

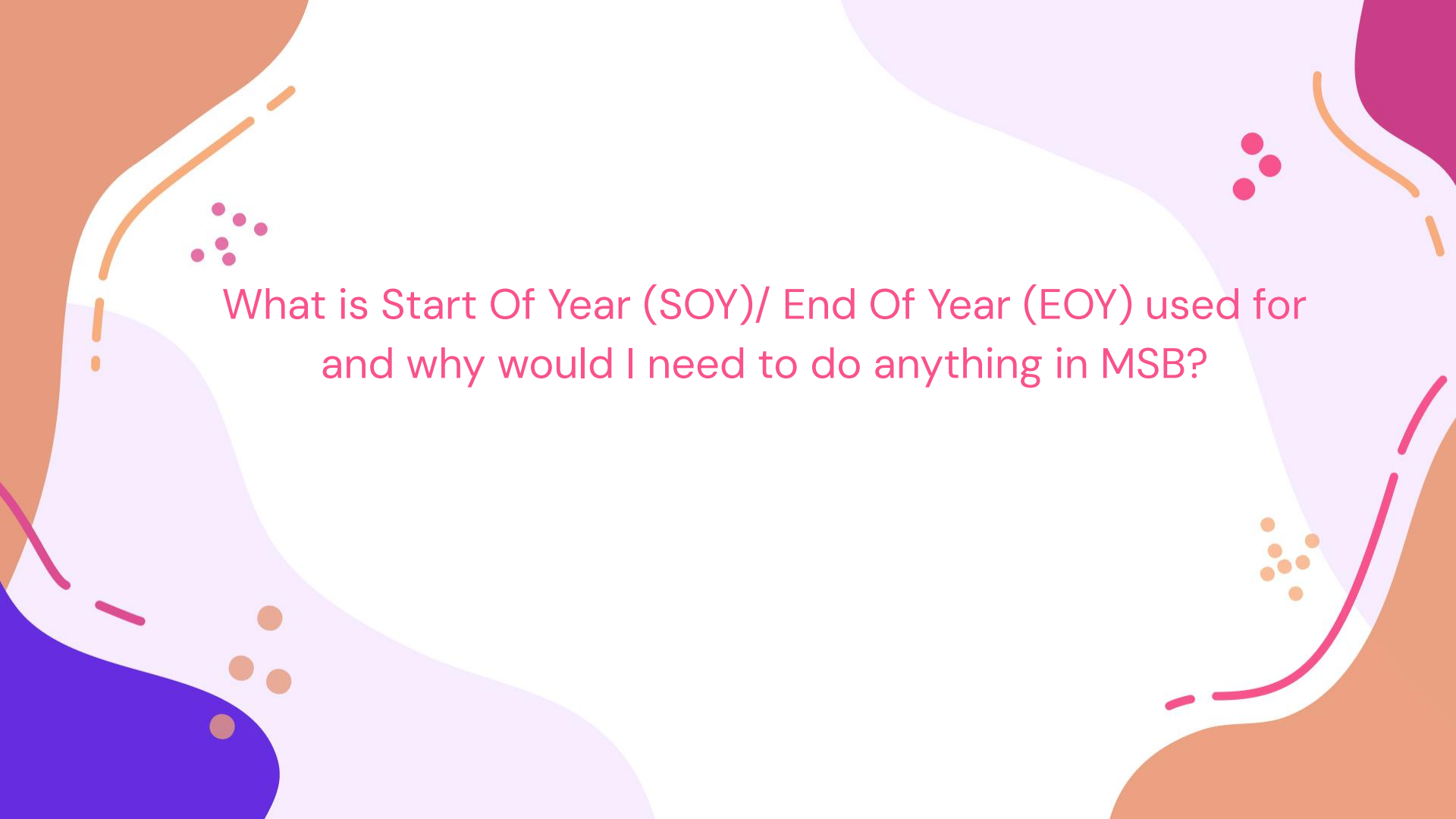


CONNECT

Level Up: Striving for a successful End of Year and Start of Year in MySchoolBucks

PRESENTED BY: Siobhon Aviles-Burgos and Mikel Diaz





What is Start Of Year (SOY)/ End Of Year (EOY) used for
and why would I need to do anything in MSB?

- Some districts at the end of the school year would set special dates on MSB so that there are no more transactions or updates while the EOY rollover process is being conducted.
- Other districts set it so that there are no payments being processed during the off time it makes it easier for them to have a clean slate to the new year in terms of reconciliation.

What steps should I take for Start Of Year (SOY)

- Log into MySchoolBucks
- Navigate to the admin dashboard
- Down to the configurations Tab
- Navigate to special dates
- Here you will be able to set your Start Of Year.



What is EOY used for and why would i need
to do anything in MSB?

Navigating to End Of Year (EOY)

- Log into MySchoolBucks
- Navigate to the admin dashboard
- Down to the configurations Tab
- Navigate to special dates
- Please keep in mind that if there is a special date set for EOY you would just edit the start and end date
- The Start date would be the date that you would like to stop payments and the End date would be the day that payments resume

What happens when you do EOY for graduating students balances?

- The students balance stays with the students ID number and parents should follow the refund policy for their specific district.
- You are able to clear all graduating students balances in MySchoolBucks so that the graduating students balance shows \$0 in MySchoolBucks but it will not affect the students balance in your POS.

Clearing AutoPay for Seniors

To navigate to the clearing AutoPay for seniors once you are on the students tab you will be able to do the following:

- On the top you will see filters you are able to look for the students that have already graduated. If you click on the student on the top you will be able to see the clear autopay button
- You are able to mass clear auto pay for students that graduated if you pull up a specific grade and select all on the top left corner
- Then you would scroll to the bottom and do selected actions
- Then clear auto pay
- This will only clear the autopay for the students selected

What happens if I don't clear auto pay?

If you don't go through the clear auto pay for senior there might be a chance that you give the senior or the parent a refund for the funds in the account when the system starts back up from EOY and the student still has auto pay it could cause the auto pay to trigger another payment for that graduated student.

Parent support is not able to do refunds unless its a Same day payment reversal the parent would have to call in the day that the payment processed before end of business day.

Thank you

The logo consists of a white circle containing the word "CONNECT" in a sans-serif font. The "N" is orange, while the other letters are purple. The background features abstract, flowing shapes in shades of purple, blue, orange, and pink, with small clusters of dots in corresponding colors.

CONNECT