



CONNECT

# Level up: Striving for a successful End of Year and Start of School

PRESENTED BY Duane Miller

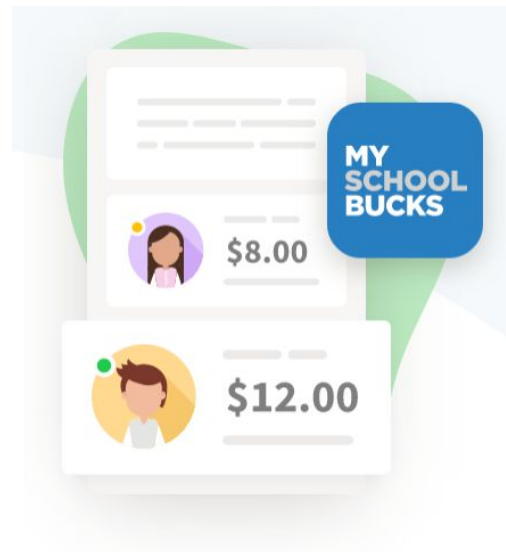




# Mosaic: End of Year

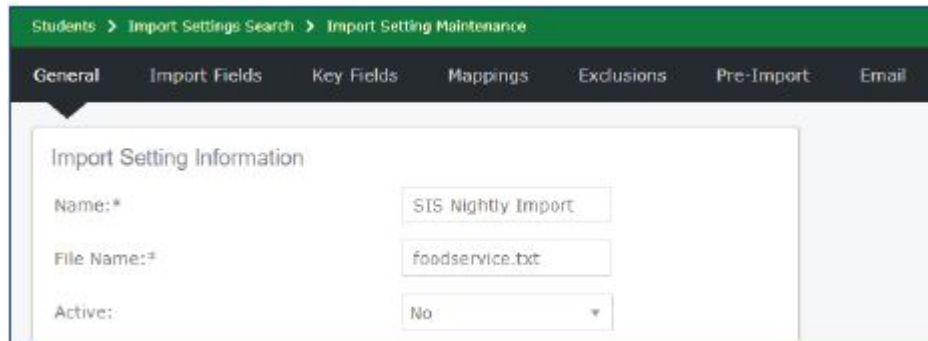
# MySchoolBucks

- Inform Parents
  - Last Day for Payments
  - Refund Policy
  - Reminder to disable automatic payments
  - Review automatic payments
- Refunds From Mosaic
  - It's best practice to deactivate the Mosaic Account prior to refunding.
- Establish Special Dates
  - Special Dates establish non-payment periods
- Update Dashboard
  - This will inform help parents



# Imports

- Click Students.
- Select Import Settings.
- Locate your district nightly import and select it. Normally, the nightly import is at the top of the list.
- Select No from the Active drop-down menu.
- When finished, click Save.



The screenshot shows a web application interface for 'Import Setting Maintenance'. At the top, there is a green header bar with the breadcrumb 'Students > Import Settings Search > Import Setting Maintenance'. Below this is a dark navigation bar with tabs: 'General', 'Import Fields', 'Key Fields', 'Mappings', 'Exclusions', 'Pre-Import', and 'Email'. The 'General' tab is selected. The main content area is titled 'Import Setting Information' and contains three fields: 'Name:\*' with the value 'SIS Nightly Import', 'File Name:?' with the value 'foodservice.txt', and 'Active:' with a dropdown menu set to 'No'.

## PowerSchool API

- Navigate to Setup > Tools.
- Select Scheduler Task.
- Select the scheduled job for the Powerschool nightly import.
- Select No from the Active drop-down menu.
- When finished, click Save.

# Review – Verification

- Eligibility (F&R) > Eligibility Management > Verification
  - Make sure it was Completed, if not – click “Complete Verification”
- Pring Verification Collection Reporting and Archive

Reports > Eligibility (F&R)

Eligibility (F&R)

1

Eligibility Record History Report

➔

☆

Notification (Letters)

➔

☆

1

Eligibility Record Listing Report

➔

☆

1

Eligibility Record Student Listing Report

➔

☆

1

Eligibility Record Summary Report

➔

☆

1

Daily Eligibility Snapshot Report

➔

☆

1

Disclosure Report

➔

☆

1

Eligibility Record Report

➔

☆

1

Eligibility Statistics By Grade Report

➔

☆

1

Eligibility Statistics By School Report

➔

☆

1

Race And Ethnicity Breakdown Report

➔

☆

1

Status Compare Report

➔

☆

1

Verification Collection Application Report

➔

★

1

Verification Collection Report

➔

★

1

Verification Collection Result Report

➔

★

1

Verification Collection Student Report

➔

★

Heartland School District

Eligibility (F&R) > Eligibility Management > Verification

General For Cause

Verification Information

Step 1: Initial Selection

Selection Method:\* Standard (Error Prone) ▼

Select for Verification

View Verification Selection

Delete Verification Selection

Step 2: Manual Changes (Optional)

Add Application

Remove Application

Step 3: Completion

Complete Verification

Verification was completed by Duane.Miller@e-hps.com on 11/15/2022 10:05:43 AM

# Account Balance Notification / Refund Process

- Create and send end of year letters to parents
  - Transfer funds to siblings
  - Send home a refund check of funds left in account
- Great to use for graduating seniors
- Students > Student Letter Setup
  - Create your letters
- Reports > Student > Student Letters
  - Email or print your letters

# End of Day > Close Day

- All cashiers are reconciled
  - End of Day > Reconcile Day
- All open days are closed
  - End of Day > Close Day
- Ensures all sales reports are accurate

End of Day > Close Day Search

Close Day - Today

Serving Date	School	Status	Unreconciled Terminals	Reopened By
--------------	--------	--------	------------------------	-------------

Previous Days That Are Open

School  Status

Serving Date	School	Status	Unreconciled Terminals	Reopened By
<a href="#">2/21/2025</a>	Heartland High School	Open	0	
<a href="#">2/13/2025</a>	Heartland High School	Open	0	
2/13/2025	Heartland Middle School			Duane.Miller@e...
<a href="#">2/11/2025</a>	Heartland Middle School	Open	1	
<a href="#">2/10/2025</a>	Heartland High School	Open	0	

# Site and Grade Progression

- Setup > Initial Setup > Student Grade
  - Setup > Initial Setup > School
    - Close Year (Tab)
    - Set the graduating grades site advancement
    - IE: Grade 6 Elem to MS OR Grade 7 MS to HS
  - Student Import
- Will correct this data.

Setup > Initial Setup > Student Grade Search

Student Grade Search

	Grade	Next Grade	Student Count
1	<a href="#">PK</a>	PK	10
2	<a href="#">K</a>	K	33
3	<a href="#">1</a>	1	33
4	<a href="#">2</a>	2	32
5	<a href="#">3</a>	3	29
6	<a href="#">4</a>	4	34
7	<a href="#">5</a>	5	34
8	<a href="#">6</a>	6	46
		7	16
		8	15

Add Student Grade

Setup > Initial Setup > School Search > School Maintenance - Adams Elementary

General Local Server Close Year Other Additional CEP Enrollment Homeroom

School and Grade Advancement

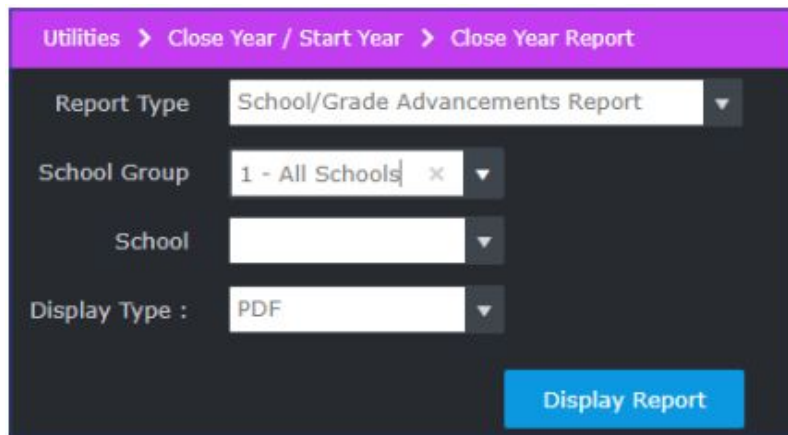
Grade	Next Grade	Next School	Student Count
1	1	Adams Elementary	14
2	2	Adams Elementary	16
3	3	Adams Elementary	15
4	4	Adams Elementary	18
5	5	Adams Elementary	16
6	6	Adams Elementary	23

Delete Cancel Save



# Close Year Report

- Utilities > Close Year / Start Year > Close Year Report
  - If changes are necessary revert to the prior steps



A screenshot of a web application interface for generating a Close Year Report. The interface has a purple header bar with the breadcrumb navigation: "Utilities > Close Year / Start Year > Close Year Report". Below the header, there are four input fields, each with a label and a dropdown menu. The first field is "Report Type" with the value "School/Grade Advancements Report". The second field is "School Group" with the value "1 - All Schools" and a small "x" icon to its right. The third field is "School" which is currently empty. The fourth field is "Display Type :" with the value "PDF". At the bottom right of the form is a blue button labeled "Display Report".

Utilities > Close Year / Start Year > Close Year Report	
Report Type	School/Grade Advancements Report ▼
School Group	1 - All Schools x ▼
School	▼
Display Type :	PDF ▼
Display Report	

# Close Year Execute

- Utilities > Close Year / Start Year > Close Year Execute

Utilities > Close Year / Start Year > Close Year Execute

1 - First Day of School 2 - Close Year Action 3 - Carryover Period Actions

Update Your First Day of School to Proceed:

Current First Day of School: 8/20/2021

New First Day of School: 8/29/2022

Utilities > Close Year / Start Year > Close Year Execute

1 - First Day of School 2 - Close Year Action 3 - Carryover Period Actions

Select Your Close Year Actions:

Advance Schools/Grades & Graduate: Yes

Blank Homerooms: Yes

Reset Student Account Balances: No

Delete Inactive Students: Yes

Clear Serving Line Notes: No

Clear Photos: Yes

Remove Inactive Schools from School Groups: Yes

Reset Student Bonus Credit Balances: Yes

Generate Close Year Archive Reports: Yes

Retain Eligibility Record Notes: No

Students Inactive Before: 5/7/2018

Cancel Back Next

Utilities > Close Year / Start Year > Close Year Execute

1 - First Day of School 2 - Close Year Action 3 - Carryover Period Actions

Set Your Carryover Period Expiration Date and Select Actions:

Carryover Period Expiration Date: 10/4/2022

Apply Carryover Eligibility to F&R Students without a Current Year Eligibility Record: Yes

Apply Carryover Eligibility to CEP/Prov Students who Advance to a Non-CEP/Prov School: Yes

Apply Carryover Eligibility to Current Year F&R Eligibility Records: Yes

Warning! This process is irreversible and should be run after ALL Manager's work is complete for the School Year!

You may only run this process once! Please review the End of Year Documentation before proceeding.

Cancel Back Close Year

The background is a vibrant, abstract composition. It features large, flowing shapes in shades of orange, light purple, and a deep blue on the left. Scattered throughout are small clusters of dots in pink, orange, and purple, along with thin, curved lines in orange and pink. The overall style is modern and artistic.

# Mosaic: Start of Year

# Start of Year – Tasklist

- Utilities > Close Year / Start Year > Tasklist > Start of School – System Setup Tasklist

Utilities > Close Year / Start Year > Tasklist > Tasklist Maintenance

Start of School - System Setup Tasklist

Task Name	Go To	Completed By	Completed Date
<input checked="" type="checkbox"/> Update Student Letters	<a href="#">Students &gt; Student Letter Setup</a>	Nora	07/07/2022 4:50:37 PM
<input type="checkbox"/> Update Application Letters	<a href="#">Eligibility (FAR) &gt; Setup &gt; Notification (Letters) Setup</a>		
<input type="checkbox"/> Update Non-discrimination Statement	<a href="#">Setup &gt; Nondiscrimination Statement</a>		
<input type="checkbox"/> Review Menu Product Detail Report	<a href="#">Reports &gt; Other &gt; Menu Product Detail Report</a>		
<input type="checkbox"/> Update Meal Prices	<a href="#">Setup &gt; Meal Price Template</a>		
<input type="checkbox"/> Update A La Carte Prices	<a href="#">Setup &gt; Menu Product</a>		
<input type="checkbox"/> Update Reimbursement Rates	<a href="#">Setup &gt; Reimbursement Rates</a>		
<input type="checkbox"/> Update User permissions	<a href="#">Setup &gt; Users</a>		
<input type="checkbox"/> Update School Information	<a href="#">Setup &gt; Schools</a>		
<input type="checkbox"/> Check the First Day of School	<a href="#">Setup &gt; System Settings Search/Central tab - First Day of School</a>		
<input type="checkbox"/> Verify Expiration Date (Application Carryover)	<a href="#">Eligibility (FAR) &gt; Utilities &gt; Eligibility Close Year</a>		
<input type="checkbox"/> Verify Expiration Date (First Year & Provisional Site Change Carryover)	<a href="#">Utilities &gt; Close Year Execute</a>		

1 2

Cancel

# Start of Year – Tasklist

- Managers/Cashiers open the POS at their school
- Does my POS have internet access?
- Updates will include
  - New students
  - New menu board layout
  - New menu item pricing
- Check pin pads/scanners



# End of Year / Start of Year – Resources

- <https://help.heartlandschoolsolutions.com/s/article/Mosaic-POS-End-of-Year-Instructions>
- Utilities>Close Year/Start Year>Tasklist
  - Check the boxes as items are completed
  - Items will be dated and time stamped with completion

# **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**