



FASTrak Year End Process



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All schools using FASTrak must complete the Year End process after the DAYEND on the last operational day or any day thereafter, but prior to the start of the new school year.

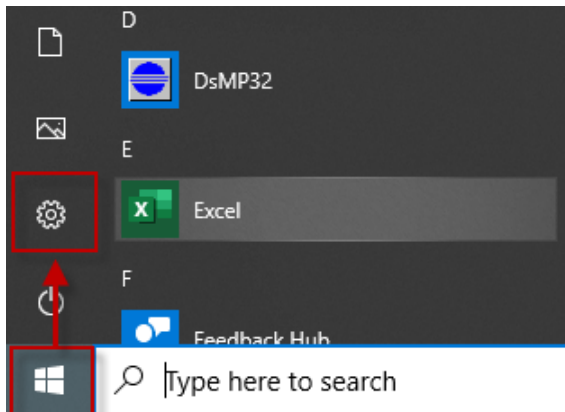
If you are using WebPOS – This process does not need to be done.

YEAR END

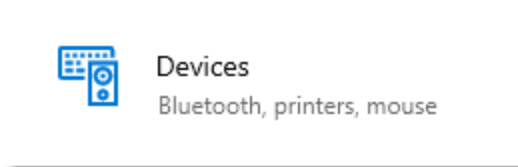
Step 1. Prepare your Printer (Windows 10)

Before beginning the Auto Year End Process, please take a moment to confirm that your printer is on and filled with paper. If you need to print to a different printer, now is the time to modify your printer settings and set the desired printer as your default printer. To modify your printer settings in Windows 10:

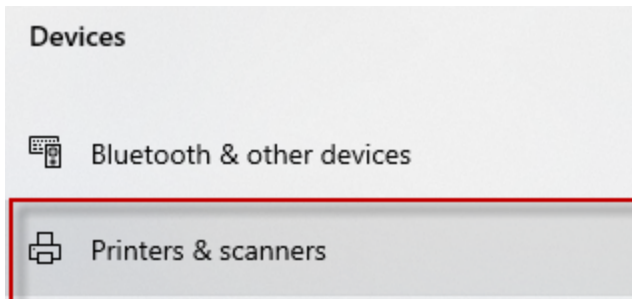
1. Click on Start and click the Gear button (settings)



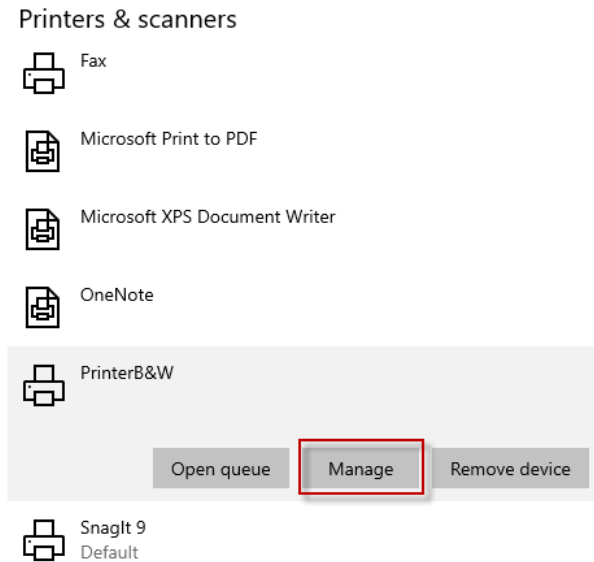
2. Click on Devices in the Settings Menu



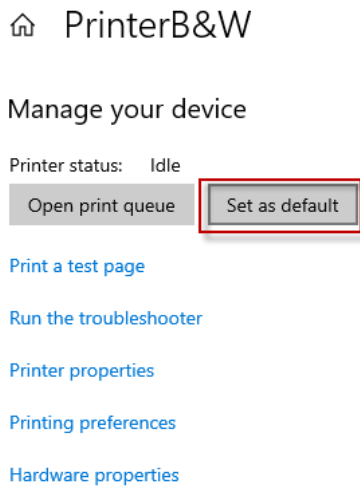
3. Select Printers and Scanners on the left-hand side of the Devices manager



4. Click on the printer you would like to set as default and press **Manage**



5. Click on Set as Default to set the printer as the default printer.



If you do not have access to modify your printer settings, please contact your local technology department.

Auto Run Year End Process

Auto Run Year End will complete the entire Year End process in one step.

Auto Year End will....

- Create multiple backup files for future reference
- Print a balance report of all accounts
- Create a balance file for upload
- Archive all History up to the date specified
- Delete Closed accounts without balances
- Clear all previous keypad numbers (not current numbers)
- Delete old overlays

Make sure that you have a Flash drive or External Device available when performing this step and take a note of the drive letter.

Year End Procedures

Year End Procedures

WARNING!

You are about to Archive/Delete All Historical Data for period before the date shown below.

The following will be performed with this Year End process:

1 <input type="checkbox"/> Backup	5 <input type="checkbox"/> Delete \$0.00 Balance Closed Accts
2 <input type="checkbox"/> Print Any Balance Report	6 <input type="checkbox"/> Clear Previous KeyPad Numbers
3 <input type="checkbox"/> Create Balance Upload	7 <input type="checkbox"/> Delete archived Overlays
4 <input type="checkbox"/> Archive History	8 <input type="checkbox"/> Clear Universal PIN Numbers

Make Sure the Printer is ready and Have Blank removable media !

Backup to Drive: To Date: 7/1/

☒ Archive History

Enter Backup Drive Letter

PCS recommends using our default "To Date" which will retain one year of history within FASTrak.

To begin the Auto Run Year End process, you must first launch FASTrak and login with an administrative account.

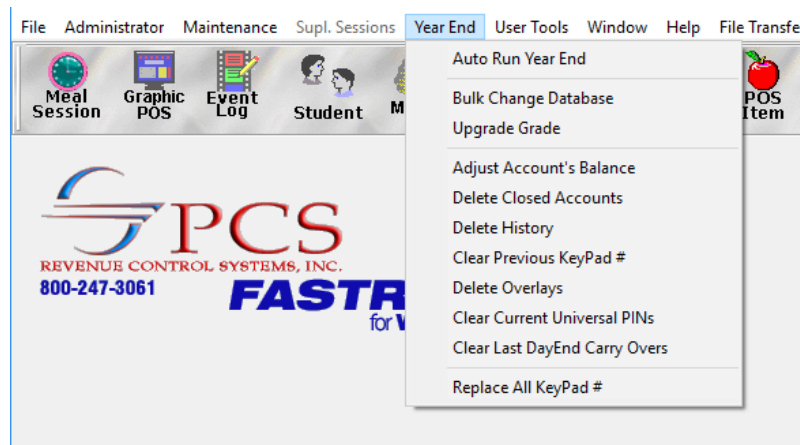
DO A DAY END BEFORE RUNNING THE AUTO YEAR END PROCESS!

Once inside FASTrak, click on:

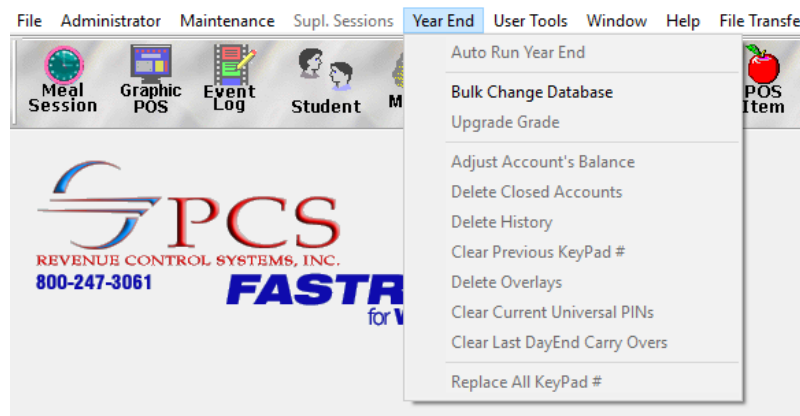
1. Year End Year End
2. Auto Run Year End Auto Run Year End

If Auto Run Year End is grayed out, you do not have sufficient rights to run this process. Please login with an administrative account. If you do not have administrative access, please contact your district's child nutrition department.

Administrative Access (note that all functions are visible on the Year End menu)




Restricted Access (note that all functions are NOT visible on the Year End menu)





The Auto Year End process may take a considerable amount of time to complete depending on the size of your school, the amount of data that will need to be archived, and the processing power of your computer. Please be patient.

Make sure that you have a Flash drive or External Device available when performing this step and take a note of the drive letter.

1. Insert the backup media, if the media is a Flash Drive or External device, make a note of the Drive letter.
2. Modify the backup drive letter if necessary 

Year End Procedures

Year End Procedures

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2 <input type="checkbox"/> Print Any Balance Report	6 <input type="checkbox"/> Clear Previous KeyPad Numbers
3 <input type="checkbox"/> Create Balance Upload	7 <input type="checkbox"/> Delete archived Overlays
4 <input type="checkbox"/> Archive History	8 <input type="checkbox"/> Clear Universal PIN Numbers

Make Sure the Printer is ready and Have Blank removable media !

Backup to Drive: To Date: 7/1/

☒ Archive History

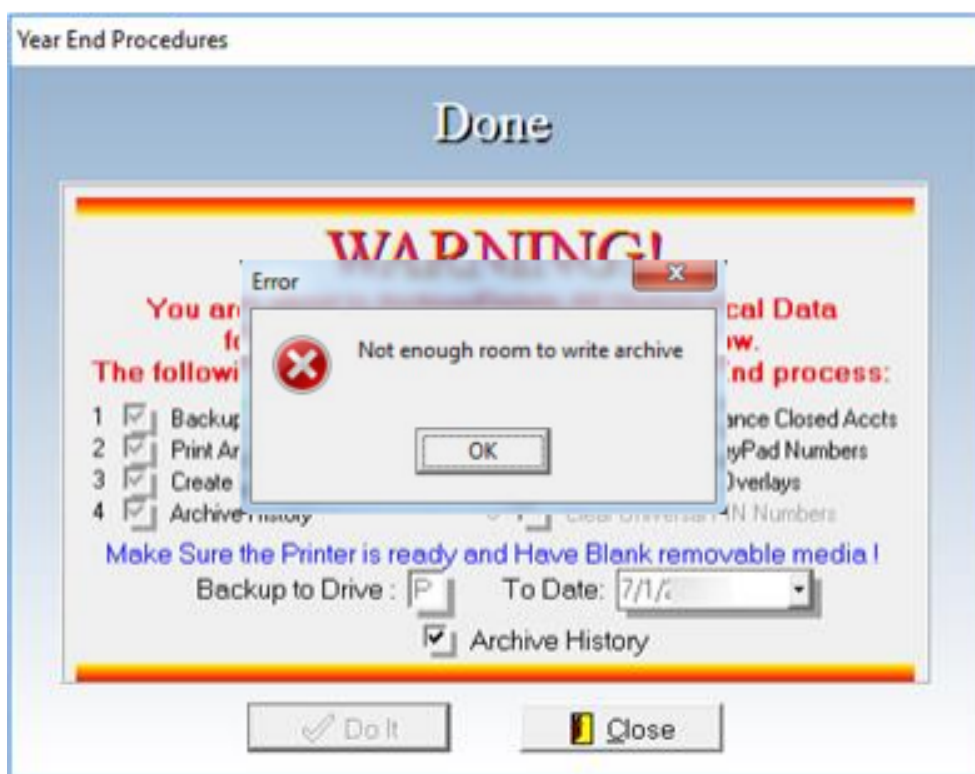
Enter Backup Drive Letter

3. Click 

Please Note: You may receive an error message that says "Not Enough Room to Archive." Press **OK**. Prompted tables will have to be deleted using table repair. If you do not receive an error, you may proceed with the next step.

You will see the following screen when the Auto Run Year End process is complete.

4. Click on Close to complete the process.



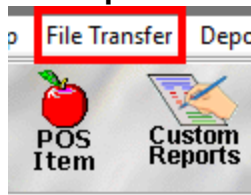
☐ Step completed

Step 2. Communicate to District

Perform your regular communication procedure to transmit these changes to the District Office



Note: the File Transfer option at the top of the FASTrak screen can also be used.



If your district is a hybrid district (RIGHTNOW/FASTrak) the changes will automatically send.

This step is critical to the success of District-wide balance transfers!!

DO NOT SKIP THIS STEP!

☐ **Step completed**

YEAR START



If your district uses RIGHTrak/RIGHTNOW, you must do YEAR START AFTER RIGHTrak/RIGHTNOW YEAR START.

Please proceed to **Year Start For District Using RIGHTrak/RIGHTNOW** on next page.

If your District **DOES NOT** use **RIGHTrak/RIGHTNOW**, you will need to follow our **MANUAL Year Start Process**.

Year Start for District USING RIGHTrak/RIGHTNOW

Step 1: Processing the New Enrollment



You may proceed once your District is ready to begin the New School Year with new enrollment information.

Perform your regular communication procedure to receive the changes from the District Office.

This step will also upload the balances and keypad numbers of all students in RIGHTrak to allow central office Keypad Note printing.

1. Enter FASTrak

2. Click on Import if prompted.



Verify that you have successfully imported your new enrollment information and successfully upgraded your students by spot checking several known students.

Verify new students and graduates

If your database does not contain your new students and your old students in their new grades, please contact your district office as soon as possible!!

Once you have verified that your database contains your new students and your old students in their proper grades, you may continue with creating a balance file.

1. Click on the Maintenance tab at the top of the screen Maintenance

2. Click on Create Balance Upload File Create Balance Upload File >

3. Click on Append Append

4. **RUN DAY END**



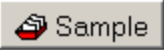
☐ **Step completed**

Step2. Print Keypad Cards




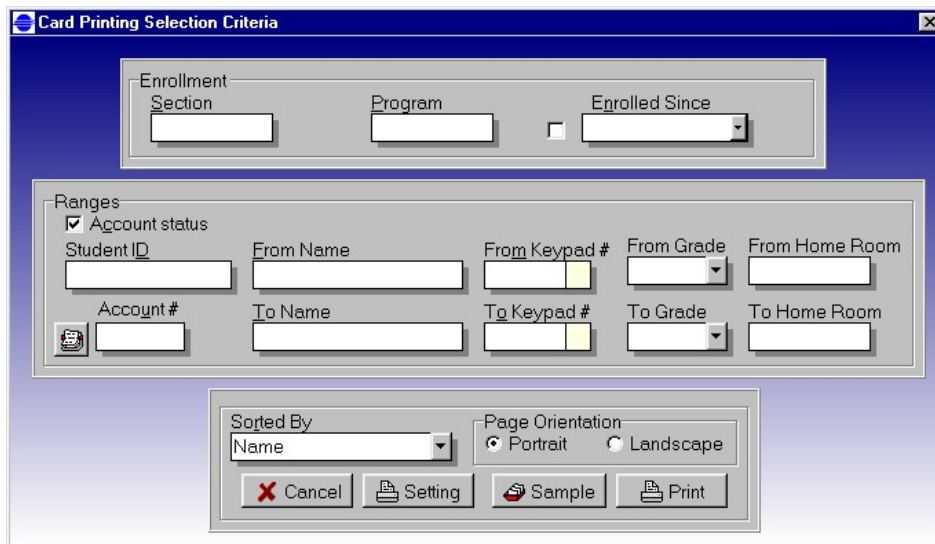
If your District Office prints Keypad cards for you, you may skip this step.

This procedure will print Keypad cards for your students to inform them about their keypad number. You can print cards for all students or only for the new students, depending on your needs.

1. Start FASTrak
2. Click on Maintenance 
3. Click on Print User Cards 
4. Click Sample to verify your card configuration and card content 

Once you have verified your card configuration and card content;

5. Enter the desired Selection Criteria and Sorting Order
6. Make sure your printer is on and you are using the correct printer paper
7. Click Print 



☐ Step completed

☐ Step skipped

**FASTrak Year End and Year Start are now complete for
Districts using RIGHTrak/RIGHTNOW**

Fastrak Year Start (At school)

PCS recommends that for 3 days prior that you run 3 day ends on each day before school starts. We recommend this to ensure that all new information that needs to be brought into the program will carry over.

If you run into any issues PLEASE CALL US at 1-800-247-3061.

☐ Step completed

YEAR START





The following pages are for Districts that do not
utilize RIGHTrak/RIGHTNOW.
**DO NOT PROCEED IF THE DISTRICT USES THE
DISTRICT SOFTWARE PROVIDED ABOVE.**

If your District **DOES NOT** use
RIGHTrak/RIGHTNOW, you will need to follow our
MANUAL Year Start Process in the following steps.


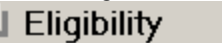
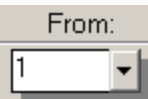
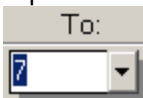

Year Start for Districts **NOT** using RIGHTrak/RIGHTNOW

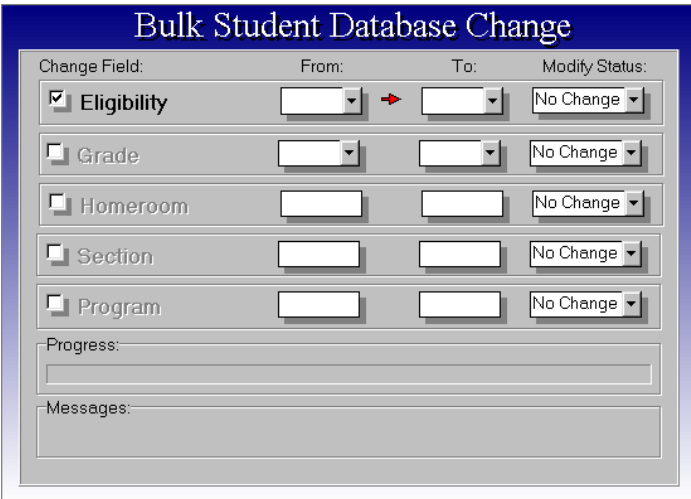
Step 1. Bulk Change Database – Temporary Eligibilities **(Manual Process)**

This function allows you to automatically change various items in the student database.

1. Click the Year End tab at the top of the FASTrak screen 
2. Click Bulk Change Database from the pull-down Menu. 

This function will change student eligibilities to a Temporary Status

1. Click Eligibility  
2. Click on the From Field 
3. Type or select the appropriate code for Free
4. Click on the To Field 
5. Type or select the appropriate code for Temporary Free
6. Click Process Changes located in the upper left corner 
7. Repeat steps 4 through 6 for each eligibility that needs to be changed



The screenshot shows the 'Bulk Student Database Change' window. It has a title bar and a main area with a table-like structure. The table has four columns: 'Change Field:', 'From:', 'To:', and 'Modify Status:'. There are five rows of fields: 'Eligibility', 'Grade', 'Homeroom', 'Section', and 'Program'. The 'Eligibility' row has a checked checkbox, a dropdown menu with '1' selected, a red arrow pointing to another dropdown menu, and a 'No Change' button. The other rows have unchecked checkboxes and empty dropdown menus. Below the table are two text areas labeled 'Progress:' and 'Messages:'.



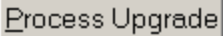
- ☐ Step completed
- ☐ Step skipped

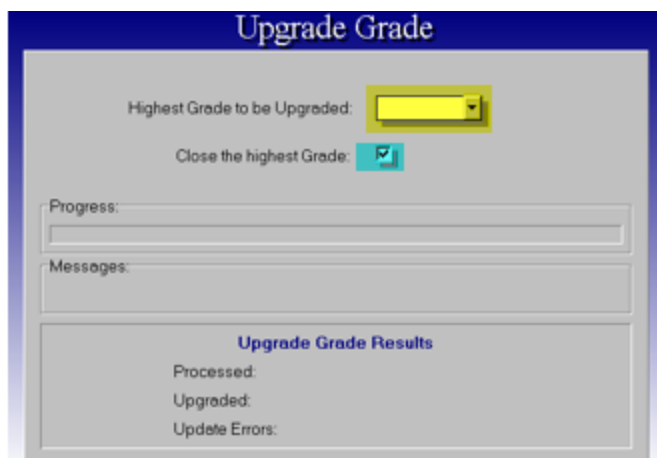
Step 2. Upgrade Grades **(Manual Process)**

Year Start for Districts NOT using RIGHTrak/RIGHTNOW

Upgrade Grades (Manual Process)

This function allows you to automatically upgrade all students' grade levels and close those students' accounts that have graduated.

1. Click the Year End tab at the top of the FASTrak screen 
2. Click Upgrade Grade from the pull-down Menu 
3. The Upgrade Grade screen appears
4. Enter the Highest Grade to be Upgraded in box provided
5. Make sure that there is a Check Mark in the Close the highest Grade field.
6. Click Process Upgrade 



The screenshot shows the 'Upgrade Grade' window. At the top, it says 'Upgrade Grade'. Below that, there is a label 'Highest Grade to be Upgraded:' followed by a yellow dropdown menu. Underneath, there is a label 'Close the highest Grade:' followed by a checked checkbox. Below these are two empty text boxes labeled 'Progress:' and 'Messages:'. At the bottom, there is a section titled 'Upgrade Grade Results' with three labels: 'Processed:', 'Upgraded:', and 'Update Errors:', each followed by an empty text box.

- ☐ Step completed
- ☐ Step skipped

Year Start for Districts NOT using RIGHTrak/RIGHTNOW

Upgrade Grades (Manual Process)

Step 3. Add New Students (Manual Process)

Add your new students to the FASTrak database

FASTrak SCMP Ver. 8.1.4 - [Students]

File Administrator Maintenance Snack/Milk Year End User Tools Window Help

Meal Session Graphic POS Event Log Student Money Report Center Letters Overlay POS Item Custom Reports Import Export

New... [F4] Edit Close/Activate Replace KeyPad# Accounting Close

Query Criteria

Account # Name (Last, First, Middle) Eligibility Add/Edit Student

Key Pad # Student ID Homeroom

Add New Student -

Enrollment Limits Guardian Picture Reminder

Enrollment Information

Key Pad Number: 208 2 Student ID: 887877553423 ☒ Active

Last Name: First Name: Middle Name:

Eligibility: Grade: Homeroom:

Section: Program: Birth Date:

Cancel Help Update

Stat	Student ID	Key Pad Number	S	Last Name	First Name
A	2021588	718	8	Abrahams	Naomi
A	2050720	201	0	Adams	Cornelius
A	2042214	204	7	Adams	Lanique
A	2011405	200	3	Adams	Rahsaan
A	2010239	723	4	Adams	Shawn
A	2042894	323	0	Adger	Shantasia
A	2042895	1406	8	Adger	Shyonna
A	2031906	202	5	Adolphe	Sarah
A	2000098	812	8	Adolphe	Schelel
A	2040818	75	4	Alexander	Chanell
A	2011421	1290	4	Alym	Shyan
A	2020142	76	1	Allen	Robert
A	2020492	26	0	Allen-scruggs	Sapphire
A	2051204	311	2	Allrich	Joshua
A	2051925	335	8	Alterna	Elyse
A	2050702	205	4	Arrington	Bri-anna
A	2020449	129	4	Arrington	Bria
A	2040923	203	2	Arrington	Krystle
A	2030779	1233	6	Ashton	Zariaa
A	9901209	21	0	Atkins	Janelle

Previous Key Pad #	Guardian Last Name	Guardian First Name	M.I.
	Dufrene	Nakia	139 brook
	Adams	Holly	473 norwa
	Morris	Monroe	378 halste
	Craighead	Lonek	39 Eaton
	Oliver	Helen	166 tremo
	Adger	Ebony	462 halste
	Adger	Ebony	462 halste
	Adolphe	Harri	36 Cliffor
	Adolphe	Harry	36 Cliffor
	Williams	Timisha	25 So. Mur
	Boyd	Stephanie	78 S Harri
	Allen	Elizabeth	120 eppirt
	Allen	Natasha	323 amhe
	Bradley	Kimerly	535 s Clint
	Louimy	Alterna	109 rhode
	Arrington	Brendi	76 Eaton
	Arrington	Sakinah	264 s Burn
	Arrington	Angela	266 s Clint
	Reynolds	Treena	27 Linden
	Atkins	Harriet	66 Hillcre

Office Time 0005 09:14 AM Remind Mel

Start SCMP32 Done FasTrak VE 2006 Manual ... 9:14 AM

Edit the student database to reflect the current enrollment.

FASTrak Year End and Year Start are now complete for Districts that are **NOT** using RIGHTrak

- ☐ Step completed
- ☐ Step skipped

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PCS Corporate Headquarters in Englewood Cliffs, NJ

PCS REVENUE CONTROL SYSTEMS, INC.