



RIGHTrak Year End & Year Start Procedures



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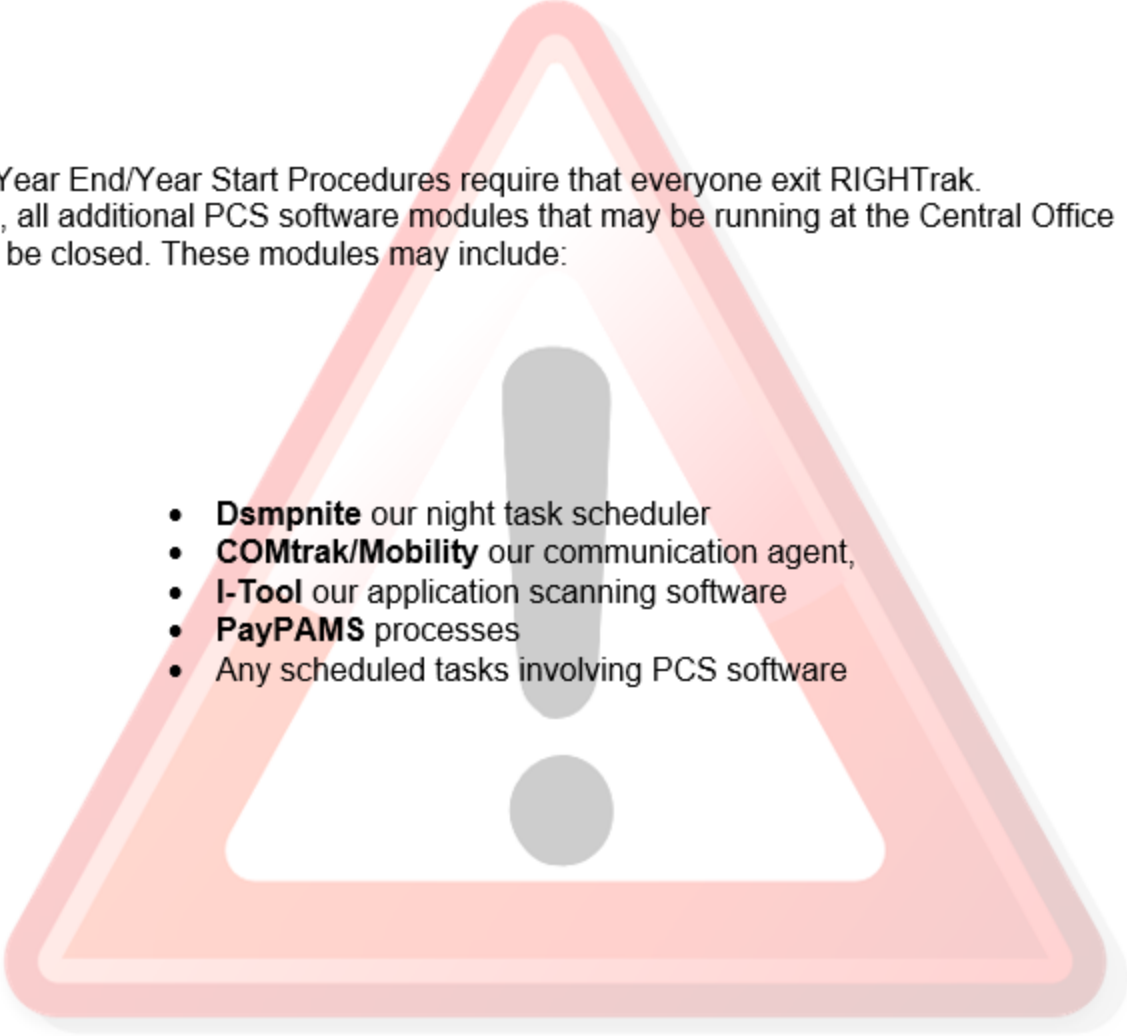
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Read this before you begin



All districts using the RIGHTrak Software **MUST** complete the following procedures after all schools have communicated their last operational day. Schools should complete the Year-End Process prior to continuing with RIGHTrak Year-End.

The Year End/Year Start Procedures require that everyone exit RIGHTrak. Also, all additional PCS software modules that may be running at the Central Office must be closed. These modules may include:

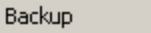
- 
- **Dsmprnite** our night task scheduler
 - **COMtrak/Mobility** our communication agent,
 - **I-Tool** our application scanning software
 - **PayPAMS** processes
 - Any scheduled tasks involving PCS software

Be sure to read and understand the entire Year End document before you begin the Year End Process.

RIGHTrak Year End Process


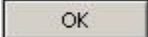
Step 1. Make a Backup

Make a backup of RIGHTrak software to a removable Media and label it “**Backup RIGHTrak Year End (insert current year ex. 20XX).**” Save the backup in a safe place for audit purposes.

1. Insert the backup media, if the media is a Flash Drive or External device, make a note of the Drive letter.
2. Launch the RIGHTrak Software
3. Click Maintenance 
4. Click Backup 
5. Click Diskette/Removable Media Full Backup 

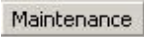

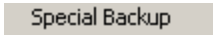


To change the drive letter double click in the box to highlight the drive letter or click in the box, delete or backspace over the letter, then type the appropriate drive letter.

6. Click Do It 
7. Click OK 

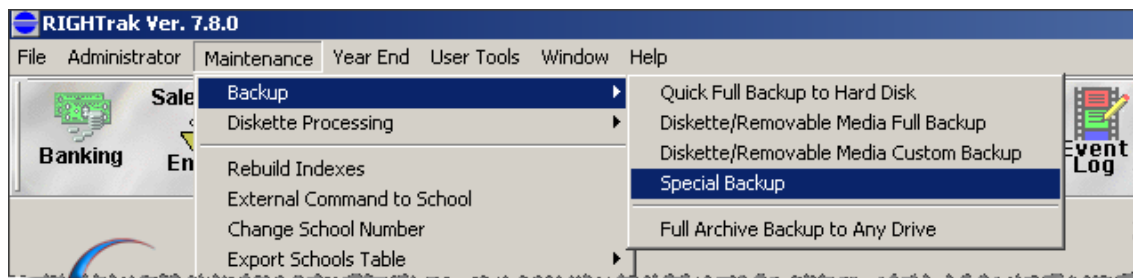
As a safeguard, PCS recommends performing a Special Backup in addition to the removable backup outlined above. The Special Backup will be stored in the Dsmp quick backup folder with a unique name.

Note: Special backups can be done at anytime before or after any step.

8. Launch the RIGHTrak software if it is not open already.
9. Close any active RIGHTrak windows and click Maintenance 
10. Click Backup 
11. Click Special Backup 


RIGHTrak YEAR END PROCESS

Make a Backup



12. Name your backup "YE(insert current year ex. 20XX)" in the blank space



13. Click Do It! 

The backup process will close upon completion.

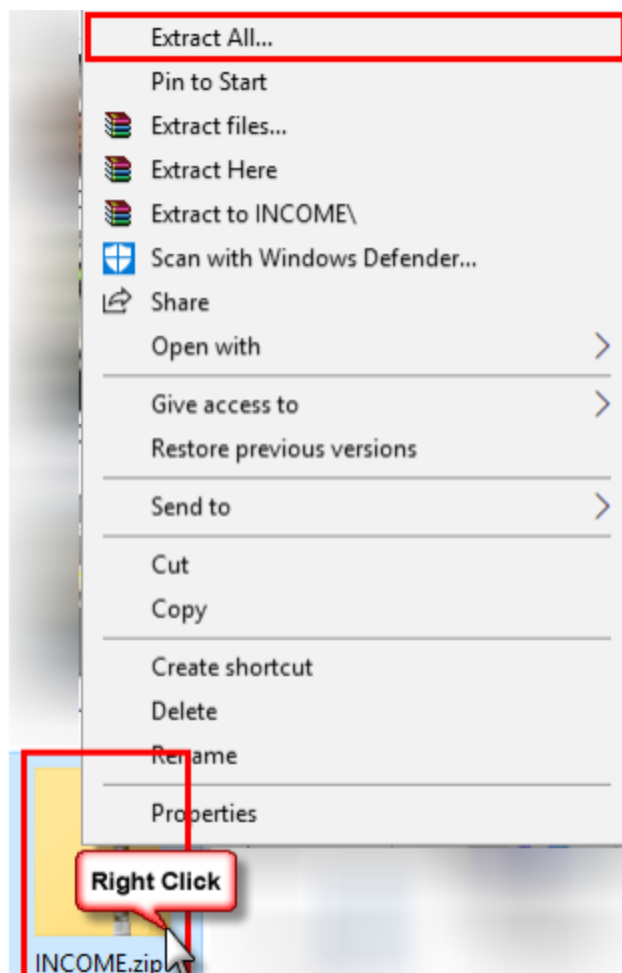
□ Step completed

Step 2. Installation of the New Config File

This year end, PCS will be releasing a new configuration file in order to update the Income Guidelines for the upcoming school year.

A new version of RIGHTrak will not be released for the upcoming year.

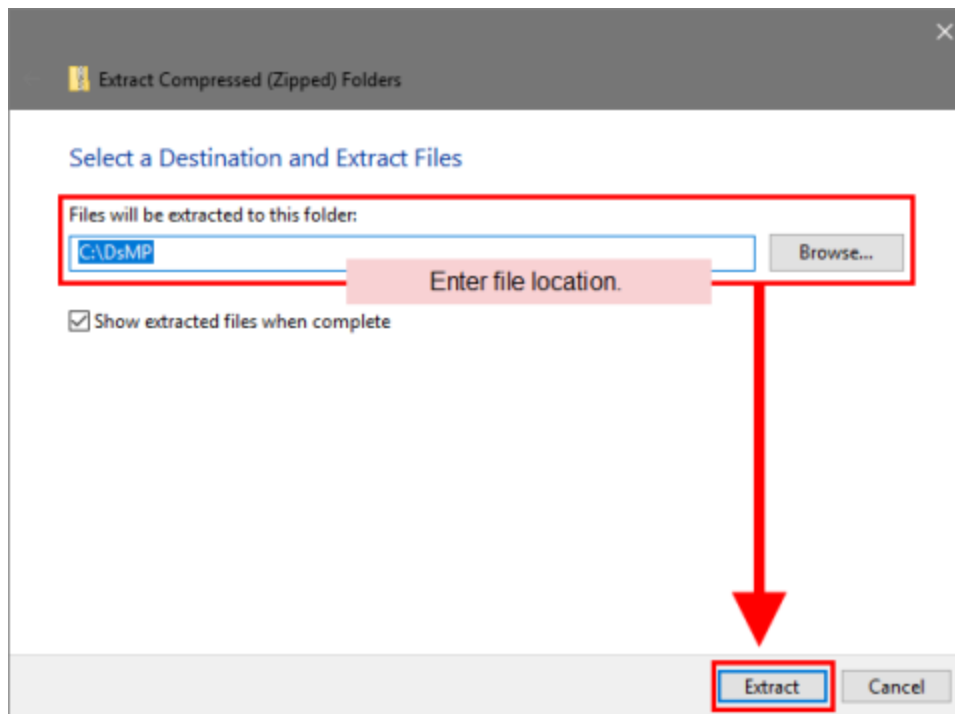
1. Download the new income file from <http://pcsrcs.com/training/video/yearend/>
 - a. It is recommended to use Google Chrome to download the income file
 - b. If you are prompted for the username and password:
 - i. Username: **customer**
 - ii. Password: **wecare1!**
2. Extract file to the DsMP folder



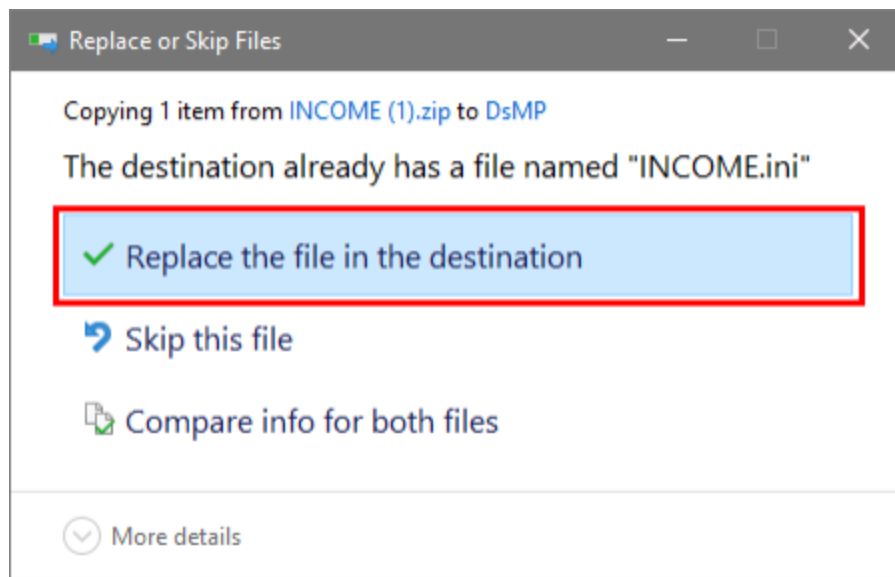
RIGHTrak YEAR END PROCESS

Installation of the New Config File

- a. The default folder is C:\DsMP if installed locally. If accessing DsMP from a network connection, be sure you are dropping the file in the correct location.



- b. When placing the file in the DsMP folder, you will be prompted to Overwrite. Make sure to overwrite the current file in the folder.
 - i. If you are not receiving a warning that you are overwriting the file, you are in the wrong folder.



❑ Step completed

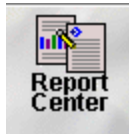
RIGHTrak YEAR END PROCESS

Installation of the New Config File

Step 3. Verify Data

From the RIGHTrak Desktop

1. Click on Report Center



The GL Data Status Report will already be highlighted.

2. Click Preview Report 
3. Verify that All Schools have communicated their last serving day

Note: The computer date determines the default viewing date

4. Close Report Center

Change the Date for previous months if necessary.

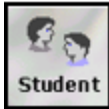
□ Step completed

Step 4. Cleaning Student ID's

Some databases may still have students with temporary student ID numbers. Permanent district ID numbers should be assigned to any student with a temporary number. This process will identify any students with temporary numbers.

From the RIGHTrak Desktop

1. Click on the Student Button



2. Type the letter "T" in the Student ID box
3. Click the Big Q

Your search results will contain all students with temporary ID numbers.

The screenshot shows the RIGHTrak Desktop interface. The 'Query Criteria' section has 'Student ID' set to 'T'. The 'Big Q' button is visible. Below the search criteria, a table lists students with temporary ID numbers. A red arrow points to the 'T' in the Student ID box.

House ID	Last Name	First Name	MI	Birth Date	Student ID	School	Grade	Home-room	Section	Program	SSN	Foster	Hor. Pho
T000108	Buffett	Jimmy			T0000001	0041						N	
T000109	Buffett	Severnash Jane			T0000002	0041						N	
T000110	Greenidge	Robert			T0000003	0041						N	
T000111	Utley	Michael			T0000004	0041							
T000112	Shakoor	Nadiah			T0000005	0041							
T000113	Taylor	Greg			T0000006	0041							

Below the table, the 'Household' and 'Application' sections are visible. The 'Household' section shows 'Anytown, NV 12345'. The 'Application' section shows 'Has Application: N', 'House Size: 0', 'In Vent: N', 'Eligibility: N', 'Reason: N', and 'Elig Date: 4/13/2010'. The 'Student' section shows 'Status: Active', 'SSN: Taylor, Greg', 'DOB: N', 'Foster: N', and 'DCRT: N'. The 'School' section shows 'School #: 0041', 'Grader: N', 'Program: N', 'Section: N', 'Home-room: N', 'Student ID: T0000006', and 'Universal PIN: 778'. The 'Scanned Appl Ref #' section shows 'From Sch#: \$0.00', 'Bal Date: N', and 'KeyPad #: 0'.

Scroll through the list of "T" Numbers and replace the temporary numbers with permanent district assigned ID numbers.

4. Search for the student that needs to be modified
5. Click on the Student to highlight them
6. Click on Edit
7. Change the Student ID
8. Click on Update

Once you click update, the student info will be removed from the screen since his/her ID number no longer starts with the letter T. Continue modifying all students with temporary ID numbers until a search of "T" students returns no results.

- ❑ Step skipped
- ❑ Step completed

Step 5. Database Clean Up

Step 5A. Clean Up Utilities

This step will purge the student and household databases of outdated information. It will also repair the records of students removed from households, but not associated with a new temporary household number. This is what we refer to as Orphaned Students.

Make sure all open windows within RIGHTrak are close before running this process.

1. Click on Maintenance at the top of the screen.
2. Click on FR Bulk Changes
3. Click on Cleanup/Repair Utils

Cleaning Up & Repair Functions

Select One or More for CleanUp or Repair

☒ Delete Closed Accounts with

☒ No Balance

☒ Inactive Since 6/30

☐ Selected Grade Only

Enrolled in School

☒ Delete Temp Houses Without Students

☒ Delete Permanent Houses Without Students ☐ and No Application

☒ Create Houses for Orphaned Students (Repair)

☒ Split Duplicate Temp Houses (Repair) - Run the Above Repair function first

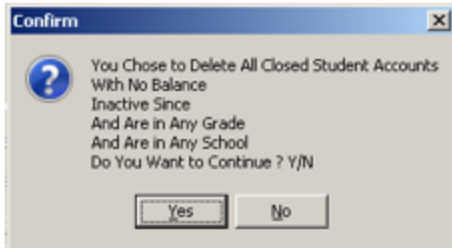
Progress:

View Job Log Preview Select 1 (Repair) Rpt to enable OK Close

*If you want all closed accounts deleted, take the check mark away from the **Inactive Since** box.*

Modify your screen to look like the one above

4. Click on OK



The clean up utilities' process may take a considerable amount up of time depending on the amount of data cleaned up and the speed of your computer.

5. Click YES in the Confirm Box
6. Each Clean Up Utility will run automatically
7. Click Close when the Progress bar reaches Done. Do NOT click OK again.

□ Step completed

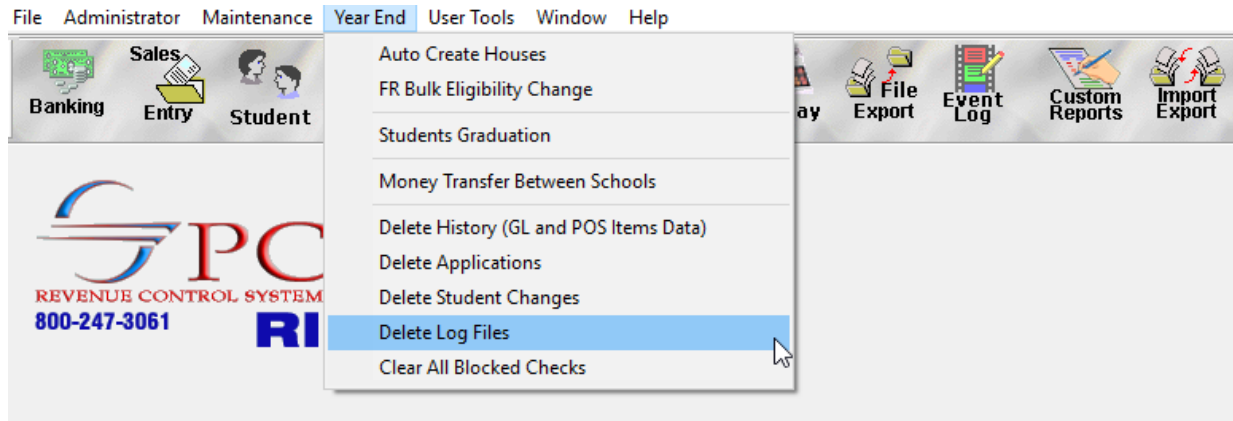
RIGHTrak YEAR END PROCESS

Database Clean Up

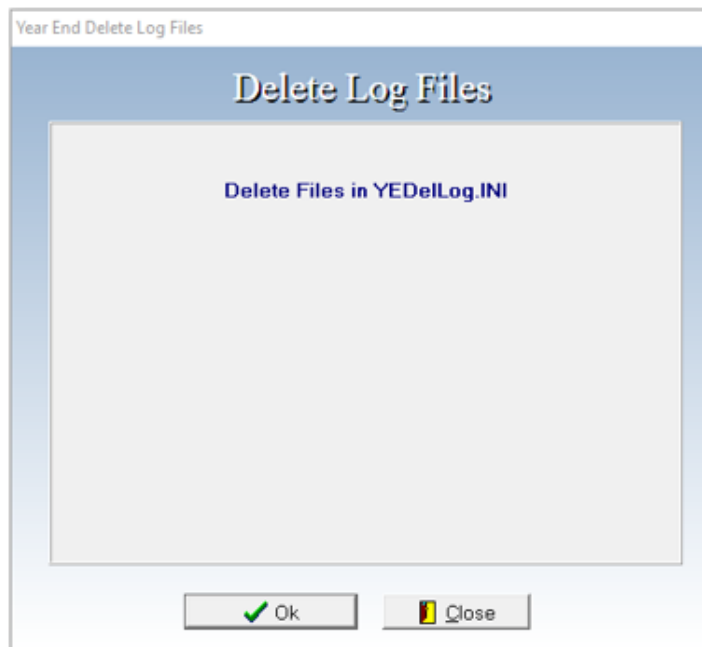
5A. - Clean Up Utilities

Step 5B. Delete Log Files

1. Click on Year End tab.
2. Click on Delete Log Files.

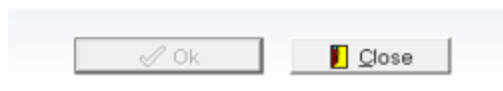


3. Click on OK to delete files.



This step can be run on weekly or monthly basis within the school year.

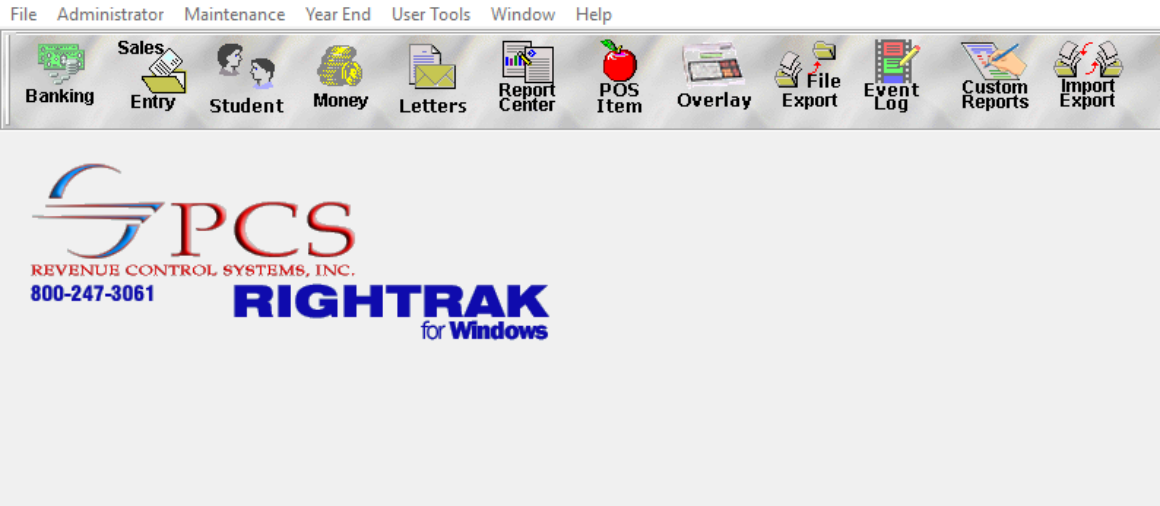
4. Click on Close when done (OK button is grayed out when done).



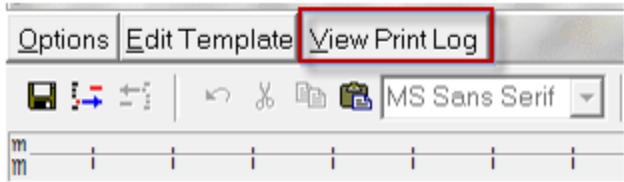
□ Step completed

Step 5C. Purge Print Log

1. Click on Letters.



2. Click on View Print Log.



3. On **Prt Date To:**, enter date x/xx/20__ then press **Q** (This will query print logs up to the date entered so you can choose the year(s) you want to purge).

Note: Leave PRT DATE TO 'blank' if you want to delete the entire log.

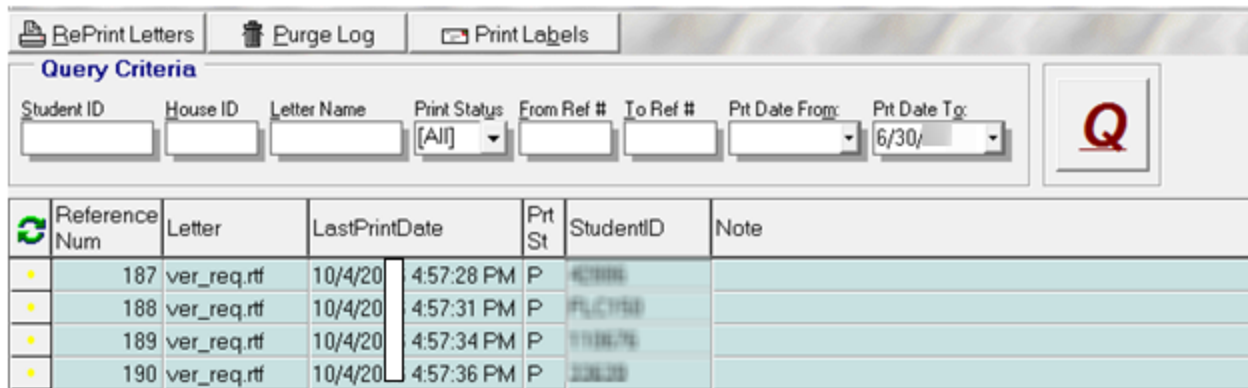
Reference Num	Letter	LastPrintDate	Prt St	StudentID	Note
187	ver_req.rtf	10/4/20	4:57:28 PM P	421116	
188	ver_req.rtf	10/4/20	4:57:31 PM P	FLC1116	
189	ver_req.rtf	10/4/20	4:57:34 PM P	1111674	
190	ver_req.rtf	10/4/20	4:57:36 PM P	211674	
191	ver_req.rtf	10/4/20	4:57:39 PM P	1111677	

RIGHTrak YEAR END PROCESS

Database Clean Up

5C. – Purge Print Log

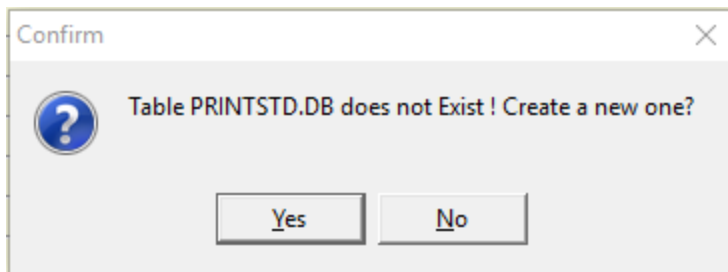
- Click on the first student ID to highlight the cell.
- Scroll to the bottom of the list or press Ctrl + End keys.
- Hold down the Shift key and click on the last student ID in the list. This will highlight all student IDs in the list.
- Press Purge Log.



The screenshot shows the RIGHTrak software interface. At the top, there are three buttons: 'RePrint Letters', 'Purge Log', and 'Print Labels'. Below these is a 'Query Criteria' section with fields for 'Student ID', 'House ID', 'Letter Name', 'Print Status' (set to '[All]'), 'From Ref #', 'To Ref #', 'Prt Date From', and 'Prt Date To' (set to '6/30/'). To the right of these fields is a red 'Q' icon. Below the query criteria is a table with the following columns: 'Reference Num', 'Letter', 'LastPrintDate', 'Prt St', 'StudentID', and 'Note'. The table contains four rows of data:

Reference Num	Letter	LastPrintDate	Prt St	StudentID	Note
187	ver_req.rtf	10/4/20	4:57:28 PM P	40000	
188	ver_req.rtf	10/4/20	4:57:31 PM P	PLC150	
189	ver_req.rtf	10/4/20	4:57:34 PM P	1110679	
190	ver_req.rtf	10/4/20	4:57:36 PM P	22000	

- If it will prompt you that 'Table PRINTSTD.DB does not Exist! Create a new one?', just click Yes then it will proceed with the Purge.



The screenshot shows a 'Confirm' dialog box with a question mark icon. The text inside the dialog box reads: 'Table PRINTSTD.DB does not Exist ! Create a new one?'. There are two buttons at the bottom: 'Yes' and 'No'.

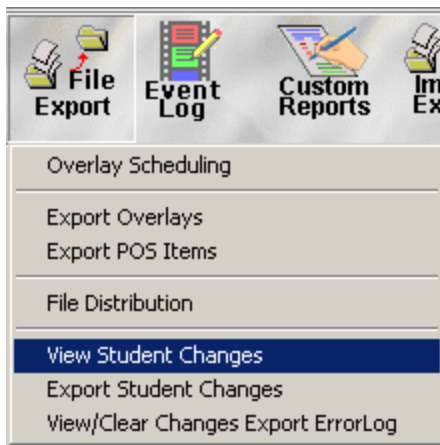
□ Step completed


Step 6. Archive the Changes Database

The archive process may take a considerable amount of time depending on the amount of data archived and the speed of your computer. PCS recommends to run all Archive Processes from the computer/ Server where RIGHTrak was locally installed.


Before archiving the Student Changes database, you will need to determine the amount of data to be archived. To do this, you must view the Student Changes log.

1. Click on the File Export Icon
2. Click on View Student Changes



3. Click on the "Sent check box", this process will place a gray check mark 
4. Leave blank the FROM date box and change the TO date box for a date which you are comfortable archiving up to. PCS recommends twelve months prior to today's date.

From To

5. Click on the Query button 
6. Write down the transaction number of the last (Bottom) record in the list. We will use this number later in the process.

Transaction #

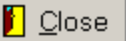
RIGHTrak YEAR END PROCESS

Archive the Changes Database

NOTE:

Keep in mind that we are archiving data not deleting data. The archived changes will be viewable in the same section of the program that you are in currently: File Export\ View Student Changes Tab.

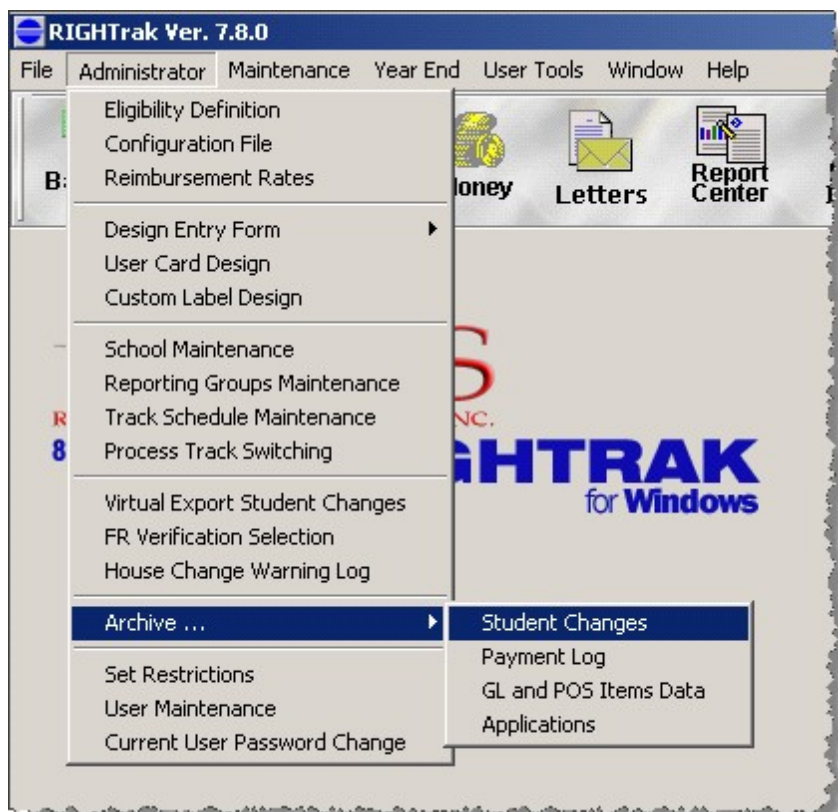
Notice the view archive button in the upper left section of this window. 

7. Close the Student Changes window 

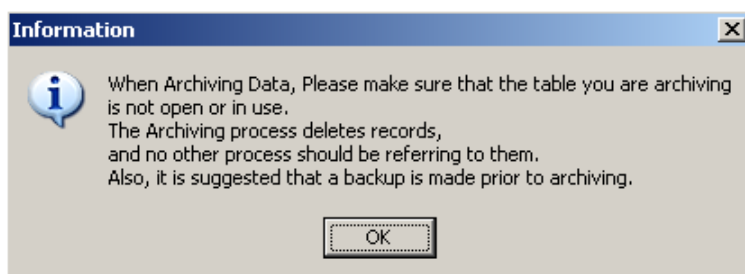
8. Click on Administrator

9. Click on Archive

10. Click on Student Changes

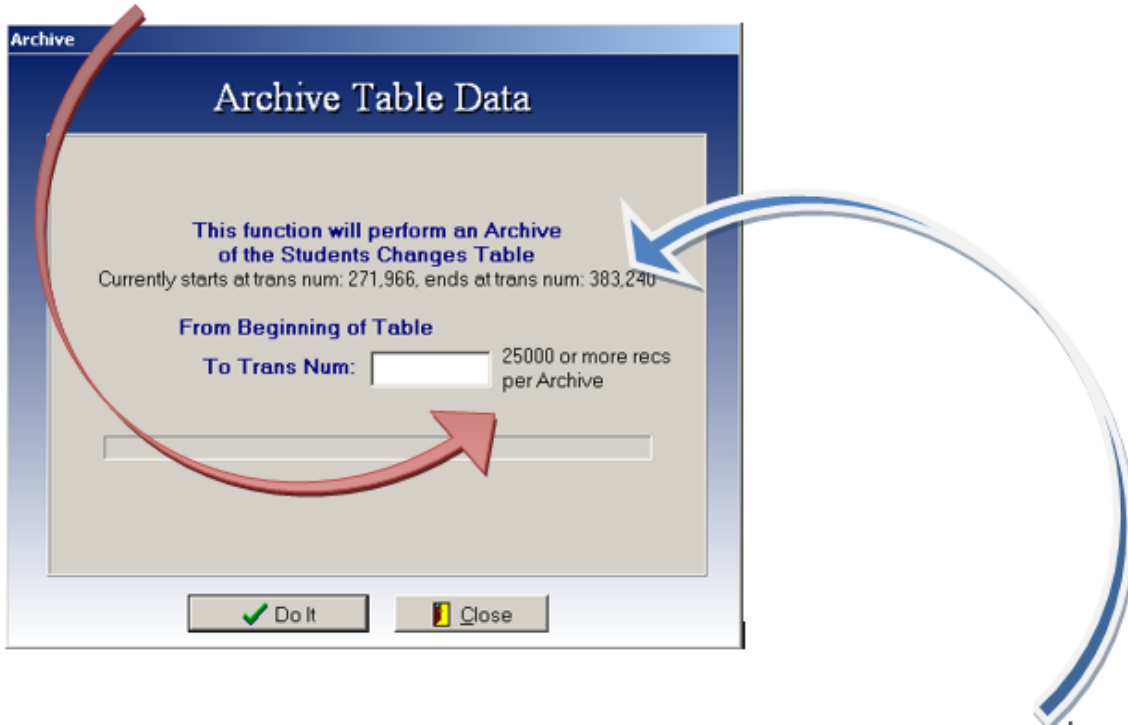


The following warning will appear



11. Click OK

12. Enter the transaction number that you noted from the Student Changes screen in the empty box.



Note:

1. If you are comfortable archiving all change history, simply enter the last number found on **your** 'Archive Table Data' screen, the '**ends at trans num**'. In the example above, you would enter **383,240**.
2. Archiving is not deleting data. It is placing the data in another location which is still viewable within RIGHTrak.
3. You may receive the following warning if there is not enough data to be Archived...



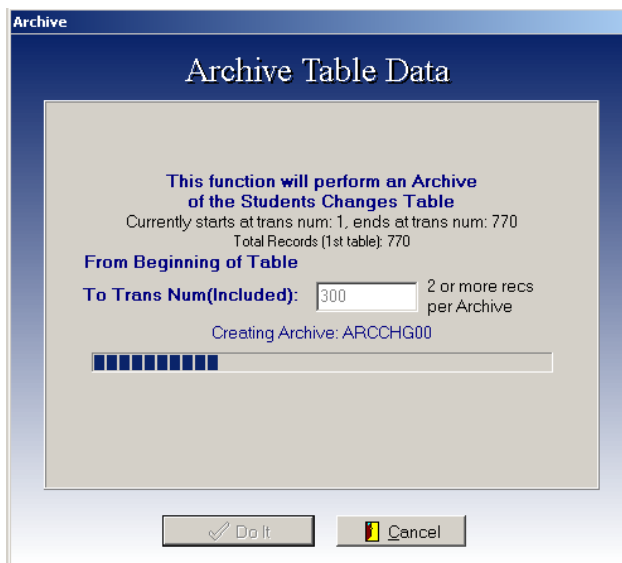
4. Check the transaction number you entered and make sure it was entered correctly on your screen.
 5. **If your numbers are correct, there is no need to archive. Simply skip this step.**
13. Click Do It



RIGHTrak YEAR END PROCESS

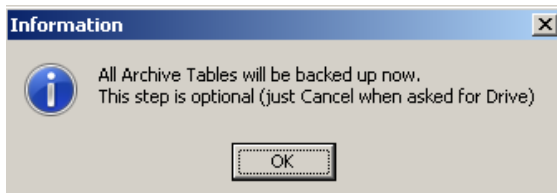
Archive the Changes Database

You will receive the following screen while the archive process is running.



The archive process may take a considerable amount of time depending on the amount of data archived and the speed of your computer. Please be patient.

Then, you will receive the following message



14. Click OK

15. From the drop-down, select the drive letter to where you would like your archive backup copied. If you would prefer not to back up your archives, simply click Cancel.



The zip Archive file will be copied to the drive you selected.



16. Then, the RIGHTrak is going to continue with the archive process.
17. Once it displays DONE, Click Close.

- ☐ Step skipped
- ☐ Step completed

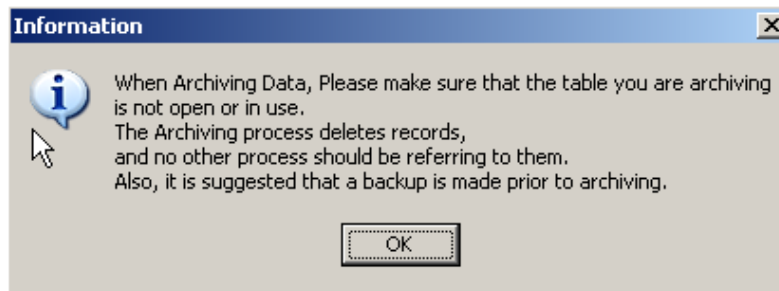
Step 7. Archive GL and POS Item History

The archive process may take a considerable amount of time depending on the amount of data archived and the speed of your computer. PCS recommends to run all Archive Processes from the computer/ Server where RIGHTrak was locally installed.

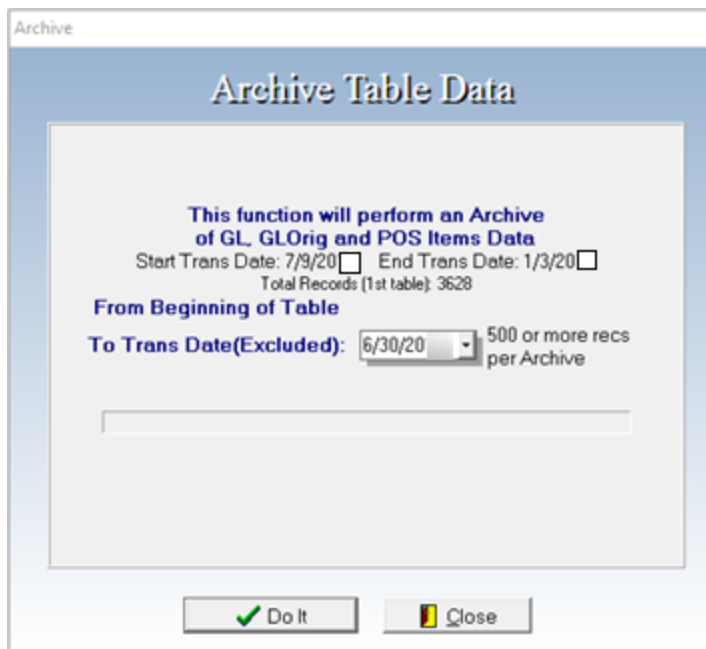
This process archives history stored in the General Ledger up to and including the date selected. **PCS recommends that you use the default date of 12 months prior to the present date.** The archived information will remain accessible, but in an archived database.


1. Click on Administrator.
2. Click on Archive. 
3. Click on Archive GL and POS Items Data. 

Please read the following pop-up message and continue when ready.



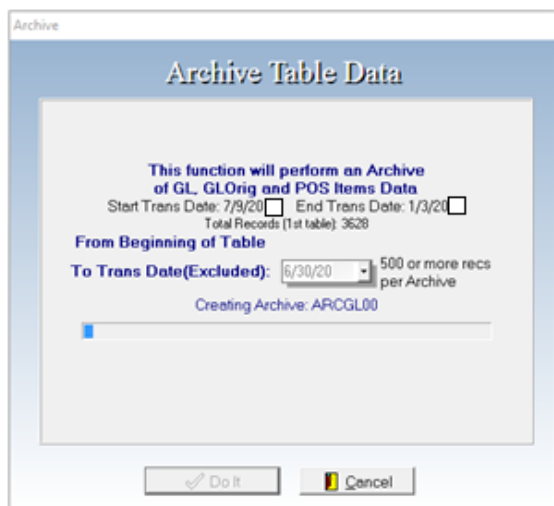
4. Enter the To Trans Date.



5. Click Do It. 

RIGHTrak YEAR END PROCESS

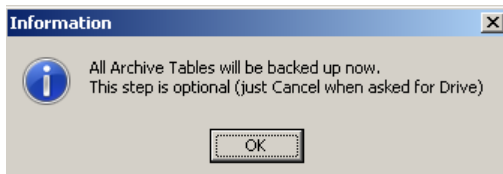
Archive GL and POS Item History



You will see the following screen while the archive process is running.

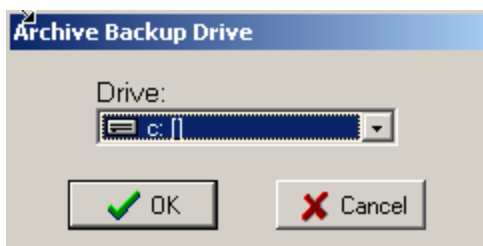
The archive process may take a considerable amount of time depending on the amount of data archived and the speed of your computer. Please be patient.

Then, you will receive the following message



RIGHTrak will now create a zip backup of your archived data.

- From the drop-down, select the drive letter to where you would like your archive backup copied. If you would prefer not to back up your archives, simply click Cancel.



The Archive backup file will be copied to the drive you selected.

- Then, the RIGHTrak is going to continue with the archive process.
- Once it display DONE, Click Close.

Step completed

Step 8. Archive Money Transaction Log

The archive process may take a considerable amount of time depending on the amount of data archived and the speed of your computer. PCS recommends to run all Archive Processes from the computer/ Server where RIGHTrak was locally installed.

Districts using **PayPAMS** are strongly encouraged to archive their Money Transaction Log.

PCS recommends retaining at least one year of history in your active database.

The date you will archive will remain accessible. It will reside in a separate archived database. Archives of the Money Transaction Log are viewable within the Money Transaction Log screen under the View Archive button.

RIGHTrak Ver. 7.8.0 - [Money Transactions Log]

File Administrator Maintenance Year End User Tools Window Help

Banking Sales Entry Student Money Letters Report Center POS Item Overlay File Export Event Log Custom Reports Import Export

Clear Trans Cancel Trans View Archive Resend Trans

Query Criteria

Reversed ☒ Transaction Type [All] From Date 7/1/20 To Date From Sch Source Clear ☒ Computer Name
Student ID Std.Name (Last,First,MI) From Trans# 1 To Trans# To Sch Dest Clear ☒ User Name

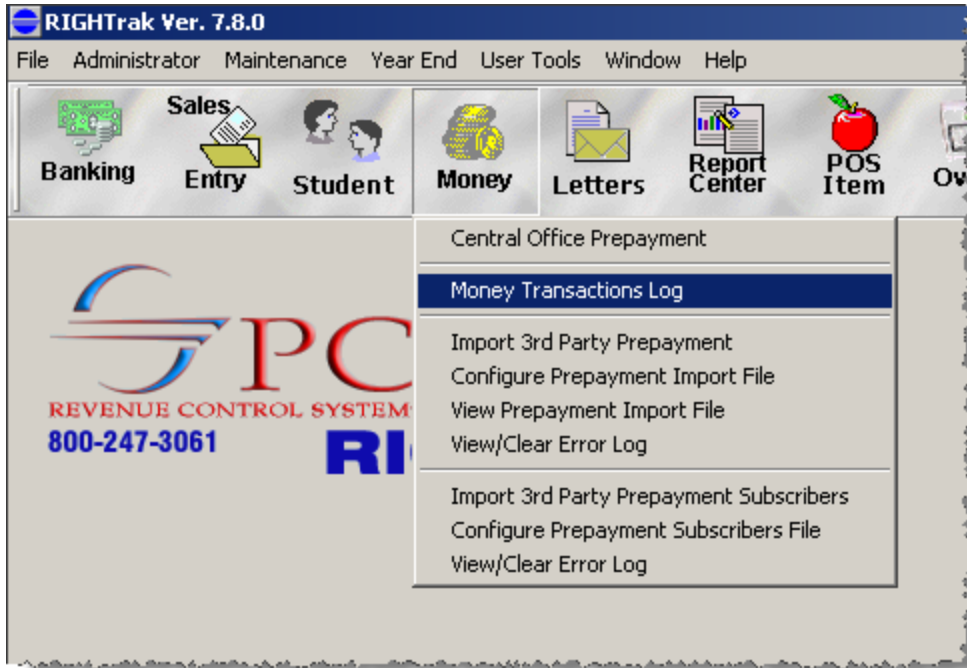
* Trans. Number	Date	Transaction Type	Amount	From Sch.	To Sch.	Student ID	StudentName	Source Clear	De
-----------------	------	------------------	--------	-----------	---------	------------	-------------	--------------	----

This utility will archive from the beginning of the Money Transaction log (the oldest recorded date) to the record number you wish to retain. You can determine the desired record number for archiving by following the direction on the next page.

RIGHTrak YEAR END PROCESS

Archive Money Transaction Log

1. Click on Money
2. Click on Money Transaction Log



3. Leave blank the FROM date box and change the TO date box for a date which you are comfortable archiving up to. PCS recommends twelve months prior to today's date.

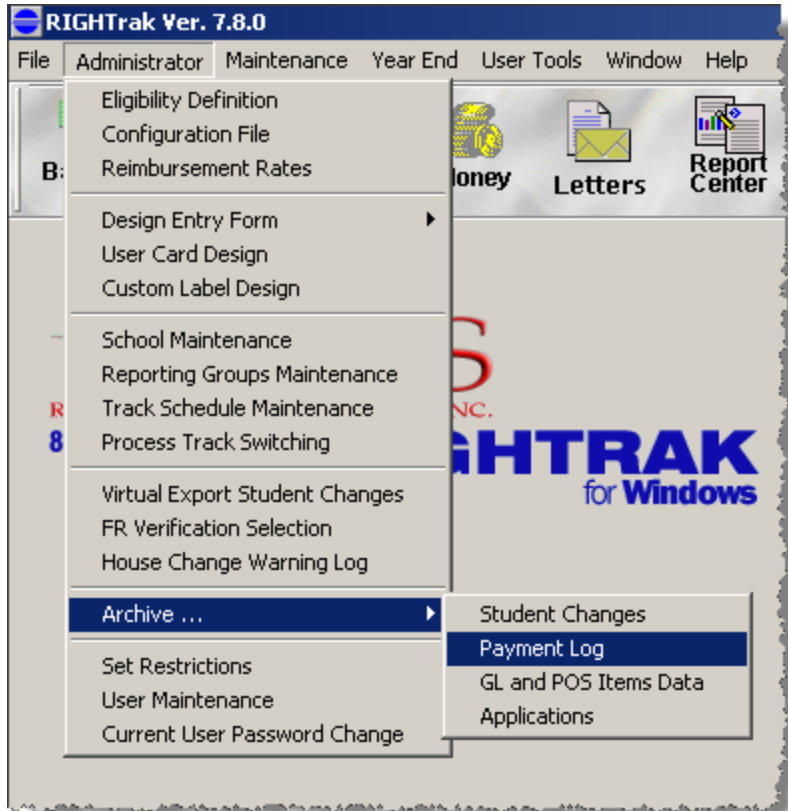
From To



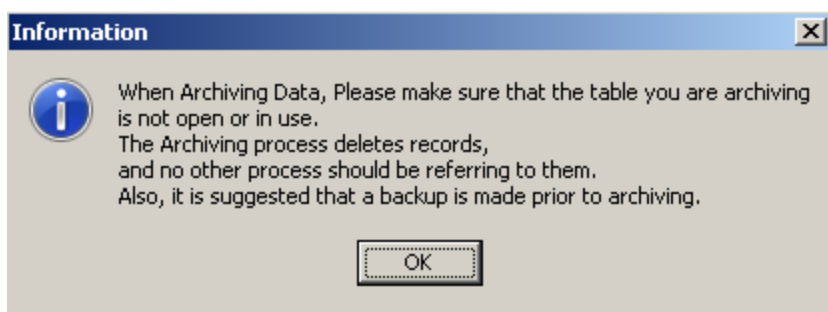
4. Click on the Query button
5. Write down the transaction number of the last (Bottom) record in the list. We will use this number later in the process.

Transaction #

6. Click on Administrator
7. Click on Archive
8. Choose Payment Log



9. Click OK to the following message.



RIGHTrak YEAR END PROCESS

Archive Money Transaction Log

You will see the following screen.

Archive

Archive Table Data

This function will perform an Archive
of the Payments Table

Currently starts at trans num: 1, ends at trans num: 4
Total Records (1st table): 4

From Beginning of Table

To Trans Num(Included): 2 or more recs
per Archive

10. Enter the transaction number you noted it on number 5.
11. Click Do It.

Archive

Archive Table Data

This function will perform an Archive
of the Payments Table

Currently starts at trans num: 1, ends at trans num: 4
Total Records (1st table): 4

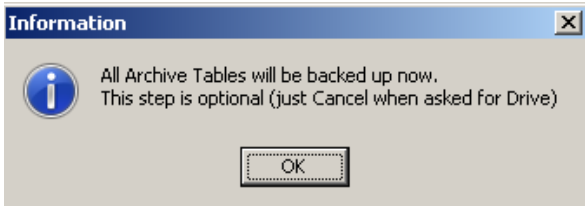
From Beginning of Table

To Trans Num(Included): 2 or more recs
per Archive

You will receive the following screen while the archive process is running.

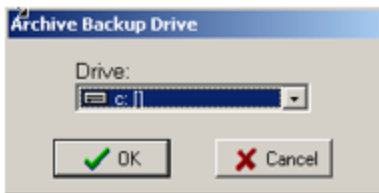
The archive process may take a considerable amount of time depending on the amount of data archived and the speed of your computer.
Please be patient.

Then, you will receive the following message



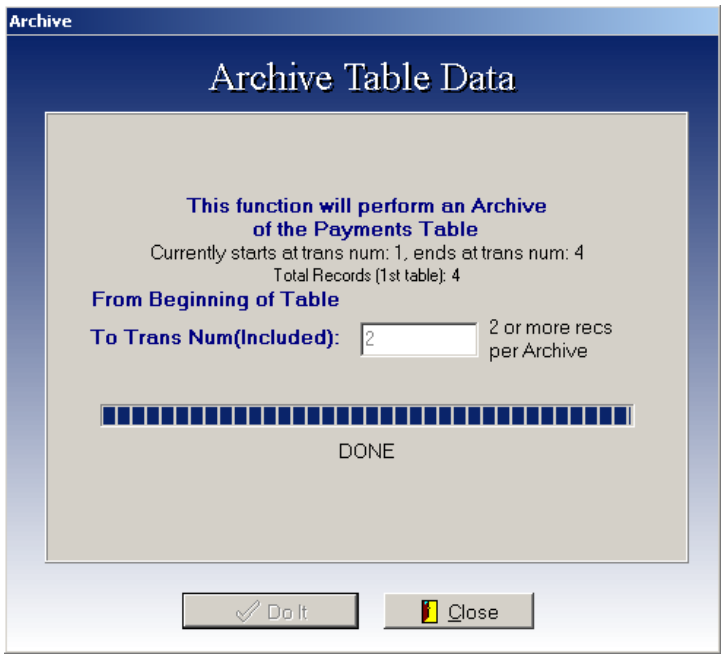
RIGHTrak will now create a zip backup of your archived data.

From the drop-down, select the drive letter to where you would like your archive backup copied. If you would prefer not to back up your archives, simply click Cancel.



The zip Archive file will be copied to the drive you selected.

You will see the following screen while the archive process is running.



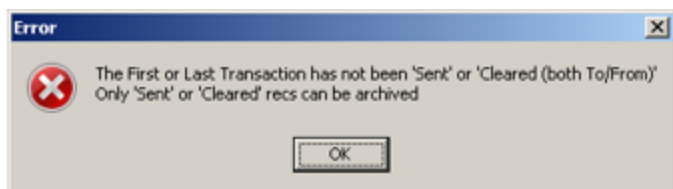
Click on Close when complete.

RIGHTrak YEAR END PROCESS

Archive Money Transaction Log

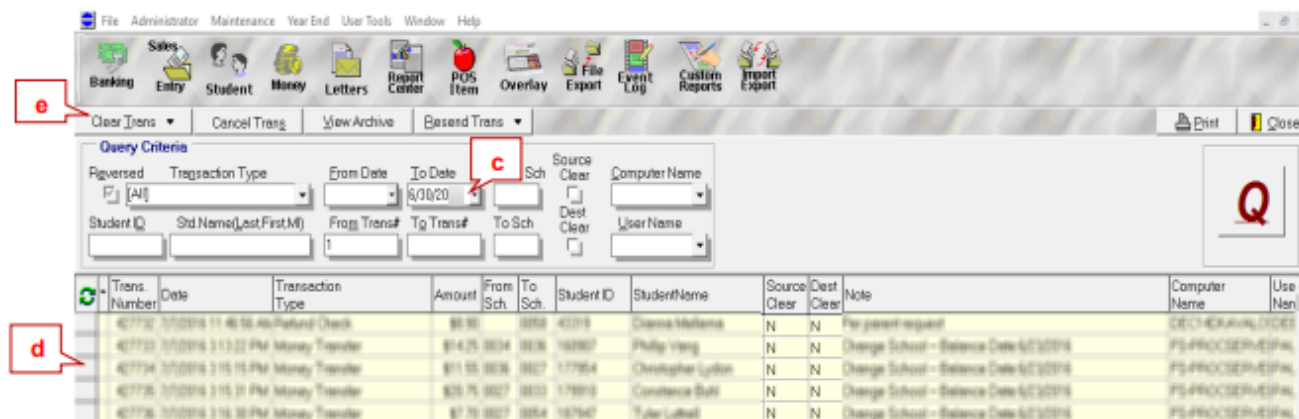
NOTE!!

If you receive the following warning message, you will need to verify that the records you are archiving have cleared both the Source and Destination before archiving.



If you are confident that all the transactions listed for archiving have reached the destination, you may clear both the source and destination flags by clicking on:

- Money Button
- Money Transaction Log
- Query the same date range in To Date box as you did in step number 3.



- Highlight all records listed
- Click on the Clear Trans button
- Click on Clear Both.



This will place a Y in both the Source and Destination box.

- ❑ Step skipped
- ❑ Step completed



If you are receiving changes and updates from the
Enrollment System,
SKIP steps 9 - 12

Step 9. Removing the Hold back Status



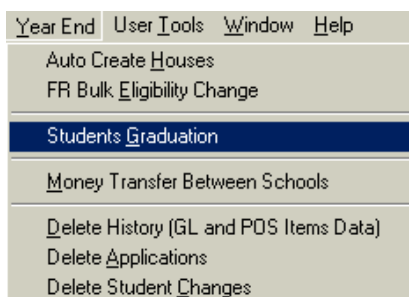
DO NOT perform this step if you are receiving changes and updates from your Student Enrollment system. Skip to Step 13.

Districts that do not receive a download file from an enrollment system must manually graduate students each year. When you performed the graduation procedure last year, a “Y” appeared under Hold Back for students as a precaution NOT to graduate these students more than once. In order to move students to the next grade you must toggle all Y’s to N’s:

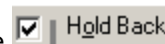
Y = Hold back, DO NOT Graduate
N = Graduate

To properly graduate students, perform the following steps:

1. Click at the Year End tab
2. Click on Students Graduation



3. Click the Hold Back box until the check mark is black and white
4. Click the Big Q



NOTE:

If you have no students with a status of Y, you may proceed to Step 10 otherwise, please continue.
The following steps will reverse the Hold Back status of those students NOT marked for graduation.

5. Click on the first student to highlight that student in blue
6. Scroll to the bottom of the list or press the Ctrl + End Keys
7. Hold down the Shift Key and click on the last student in the List. This will highlight all students in the list.

S	Hold Back	Imp Incl	Block Chks	Student ID	Enrolled School	Student Name	Grade	Section	Program	Home Room	Univ PIN	Next School
A	Y	Y		000	0376	L, Omar L	8	376		183		
A	Y	Y		000	0392	ssell S	11	392		407		
A	Y	Y		000	0374	Ju Quel	8	374		B10		
A	Y	Y		000	0310	remy	K	310		114		
A	Y	Y		000	0394	, Gregory E	9	394		E00		
A	Y	Y		000	0320	Kye S	K	320		KP1		
A	Y	Y		000	0356	Jaiyah M	K	356		108		
A	Y	Y		000	0356	sia	K	356		107		
A	Y	Y		000	0356	larquise D	4	356				
A	Y	Y		001	0390	, Carlos A	10	390		K10		
A	Y	Y		001	0314	bert A	3	314		A-2		
A	Y	Y		001	0392	hillip A	10	392		420		
A	Y	Y		001	0372	illiam D	7	372		500		

8. Click the Graduation Functions button
9. Click the Toggle Hold Back choice

Graduation Functions

- Set Default Next School
- Manually Set Next School
- Toggle Hold Back Status**
- Graduate Students

10. Click Close upon completion

- ☐ Step completed
- ☐ Step skipped

RIGHTrak YEAR END PROCESS

Removing the Hold back Status

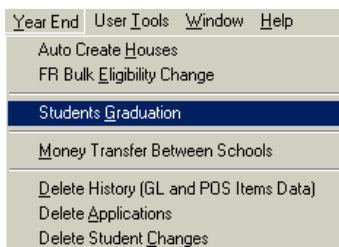
Step 10. How to Hold Back Students



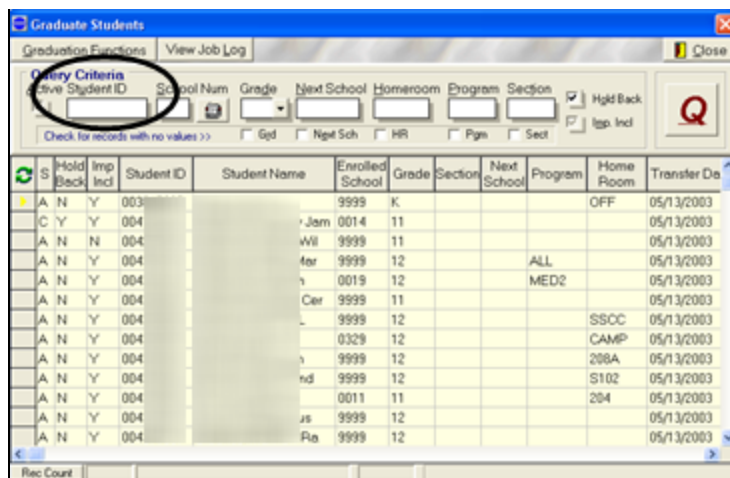
DO NOT perform this step if you are receiving changes and updates from your Student Enrollment system! Skip to Step 13.

Perform this function when you receive a list of students that are being held back. This must be performed before Step 11: Graduate the Highest Grade otherwise you will have to individually correct grades under the Student Button.

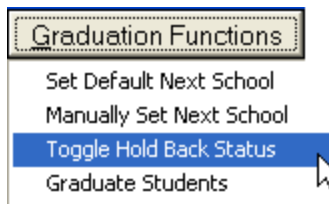
1. Click on the Year End tab
2. Click on Students Graduation



3. Type in the Student ID of the student being held back



4. Click the Big Q
5. Highlight the student
6. Click the Graduation Functions button
7. Click the Toggle Hold Back choice



8. The Toggle Status will change from N to Y
9. Repeat steps 3 - 7 until the list of **held back students** is completed

- ☐ Step completed
- ☐ Step skipped

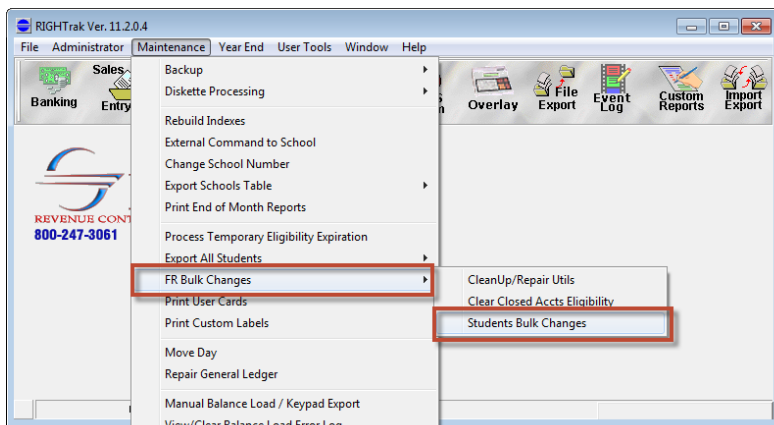
Step 11. Graduate the Highest Grade



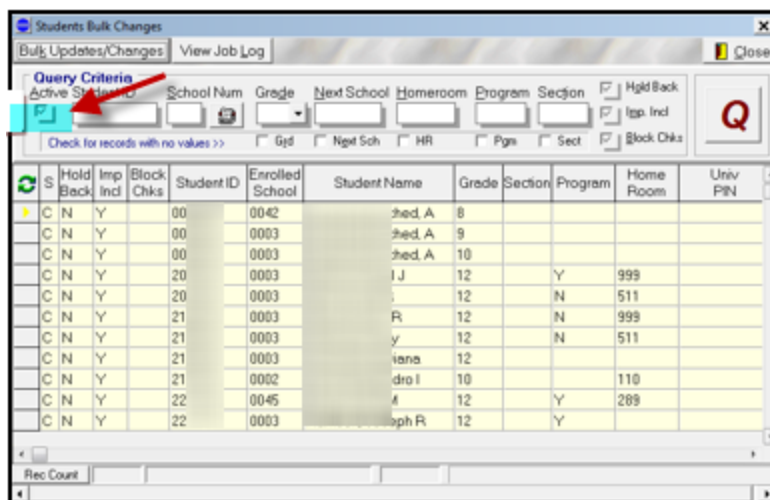
This function is optional if you are receiving changes and updates from your Student Enrollment System and choose to run the compare process.

Graduate the Highest Grade is used to move students in the highest defined grade to a closed status.

1. Click on Maintenance
2. Click on FR Bulk Changes
3. Click on Student Bulk Changes



You will see the following screen.



4. Click the **Active Status box** until the check mark becomes 'BLACK' with a white background

Students Bulk Changes

Bulk Updates/Changes View Job Log Close

Query Criteria

Active Student ID ☒ School Num Grade Next School Homeroom Program Section ☒ Hold Back ☒ Imp Incl ☒ Block Chks

Check for records with no values >> ☐ Gld ☐ Next Sch ☐ HR ☐ Pgm ☐ Sect

S	Hold Back	Imp Incl	Block Chks	Student ID	Enrolled School	Student Name	Grade	Section	Program	Home Room	Univ PIN	Ne Schi
•	A	N	Y	11	0038	Crystal J	12					
•	A	N	Y	11	0081	adley I	12					
•	A	N	Y	10	0081	Peter	12					
•	A	N	Y	10	0080	Markeita K	12					
•	A	N	Y	16	0080	lon G	12					
•	A	N	Y	16	0080	hiley B	12					
•	A	N	Y	67	0038	ec J	12					
•	A	N	Y	67	0081	' Nette S	12					
•	A	N	Y	68	0081	Danielle R	12					
•	A	N	Y	92	0081	sezanna	12					
•	A	N	Y	11	0081	i, Olivia N	12					
•	A	N	Y	10	0081	ohnathan K	12					
•	A	N	Y	70	0081	S	12					

Rec Count

5. Change the grade field to the 12th Grade
6. Click the Big Q
7. Click on the First Student in the list so they become Highlighted
8. Scroll to the bottom of the list or Hold the Ctrl Key down and press the End Key on the keyboard
9. Hold down the Shift Key and click on the last Student in the List this will highlight all students in the list at one time.
10. Click the Bulk Updates/Changes tab
11. Click the Toggle Account Status Choice

Bulk Updates/Changes

- Update Section
- Update HomeRoom
- Update Grade
- Update Program
- Toggle Import Include
- Toggle Account Status**

12. Click Close upon completion

- ❑ Step completed
- ❑ Step skipped

Step 12. Upgrade Grade

NOTE!!

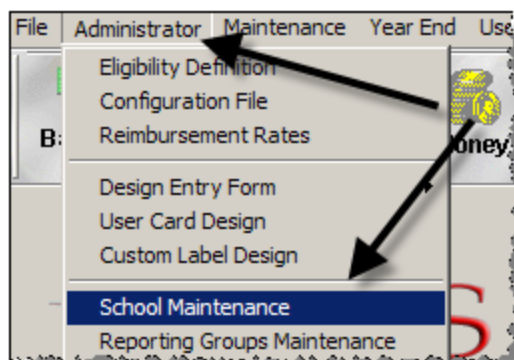
DO NOT perform this step if you are receiving changes and updates from your Student Enrollment system!

Districts that do not receive updates from a Student Enrollment System may upgrade Grades, Homeroom, Section, Program and Next School use the Student Bulk Changes section.

Before graduating your students, you must set the next school for each child. **This process will assign the “Next School” number for each student. This process will not run successfully if you have not defined the “next school” number for each of your schools.**

Setting the Next School

Setting the Next School



“Next School” number must be defined for each school under School Maintenance in RIGHTrak. If “Next School” number is not defined, edit each school under Administrator\ School Maintenance and enter the school number of the school that all graduating students will attend.

For Example: If all graduating students from school number 1234 go directly to school number 0002, you would enter 0002 in the "Next School" box when editing school 1234 under School Maintenance.

Using the example above, if all graduating students from school 1234 go to **multiple schools**, please contact PCS before proceeding. Call 1-800-247-3061 for assistance and refer to Step 11 of the RIGHTrak Year End.

The following steps will Bulk Change Next School

From the RIGHTrak Window

1. Click on Year End **Year End**
2. Click on Student Graduation **Students Graduation**
3. Highlight all the Students in the results section of the screen

S	Hold Back	Imp Incl	Black Orls	Student ID	Enrolled School	Student Name	Grade	Section	Program	Home Room	Univ. PIN	No. Schs
A	N	Y	0	0332		ne	K	132		125		
A	N	Y	0	0392		hip A	18	182		420		
A	N	Y	0	0372		iam D	7	172		500		
A	N	Y	0	0392		Anthony	12	182		128		
A	N	Y	0	0392		ryE	11	182		410		
A	N	Y	0	0350		Nicholas	7	182		316		
A	N	Y	0	0392		ayvone	12	182		112		
A	N	Y	0	0358		Michelle M	K	156		107		
A	N	Y	0	0358		inglet, Sha	K	156		108		
A	N	Y	0	0350		vique D	1	150		106		
A	N	Y	0	0358		ito P	5	156				
A	N	Y	0	0394		ne L	11	194		C20		
A	N	Y	0	0332		shen J	5	132		105		

Note: To highlight all of the Students left click on the first child in the list, scroll down to the bottom, hold down the Shift Key and left click on the last Student Record. This will highlight all Students at one time.

4. Click on Graduation Functions **Graduation Functions**
5. Click on Set Default Next School **Set Default Next School**

The following steps will upgrade the grades of all students and move graduating students to their appropriate next school.

6. Click on Graduation Functions **Graduation Functions**
7. Click on Graduate Students

RIGHTrak YEAR END PROCESS

Upgrade Grade

Hold Back	Imp Visit	Student ID	Student Name	Enrolled School	Grade	Section	Next School	Program	Home Room	Transfer Date
A	Y	N	00	ony	0083	7				
C	Y	Y	00	elle	0033	3				
A	Y	N	00	opher	0083	3				
C	Y	Y	00	Paul	0065	10				
A	Y	N	00	it	0070	8	0065			12/18/2000
C	Y	Y	00	Lucanne	0065	10				
A	Y	Y	05	in	0025	4				
A	Y	Y	05	xander B	0067	8	0065			
A	Y	Y	05	y	0067	7				
A	Y	Y	05	as	0025	4				
A	Y	Y	05	L Jacob P	0067	7				
A	Y	Y	05	ven R	0067	8	0065			
A	Y	Y	05	s B	0067	8	0065			

Note: This is a universal function. No student selection or Query Criteria is necessary.

8. Select your criteria

The Graduation Process is Not Reversible
It will operate on ALL Students
You should have a backup before continuing

Max End Grade: 12

☒ Delete Graduated Students

OK Cancel

Note: Selecting Delete Graduated Students will delete the students in the highest grade. Unselecting the box will close the students in the highest grade.

9. Click OK

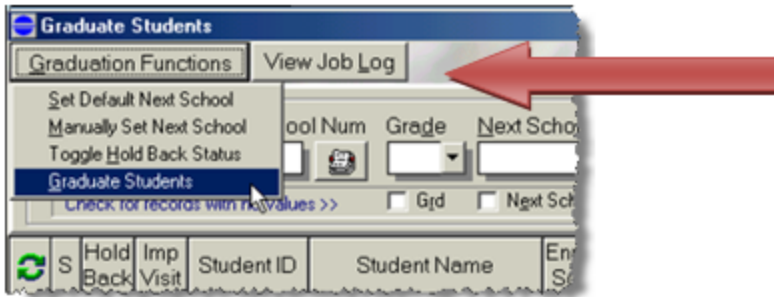
Information

There are 1204 students not graduated, due to errors
To view them click the "View Error File" Button
There were 8484 students graduated successfully

OK

10. Click OK to the Information Box

You may wish to review any upgrade errors by clicking the View Job Log button.



11. Click Close to close the Student Graduation window.

- ❑ Step completed
- ❑ Step skipped

Step 13. Make a Backup

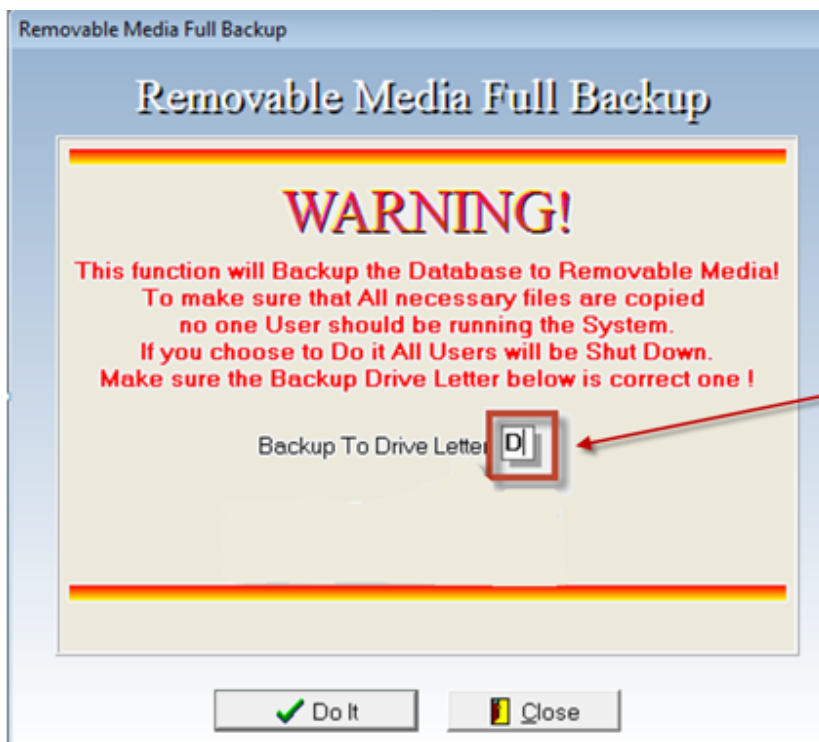
Make a backup from RIGHTrak on a **new** Flash Drive or External Hard Drive. Label the backup "Backup RIGHTrak Year End (insert current school ex. 20XX-20XX) year Step 13".

Note: DO NOT USE THE BACKUP DISKS USED IN STEP 1

Insert the backup media, and make a note of the Drive letter.

Launch the RIGHTrak Software

1. Click Maintenance
2. Click Backup
3. Click Diskette/Removable Media Full Backup



To change the drive letter double click in the box to highlight the drive letter or click in the box, delete or backspace over the letter, then type the appropriate drive letter.

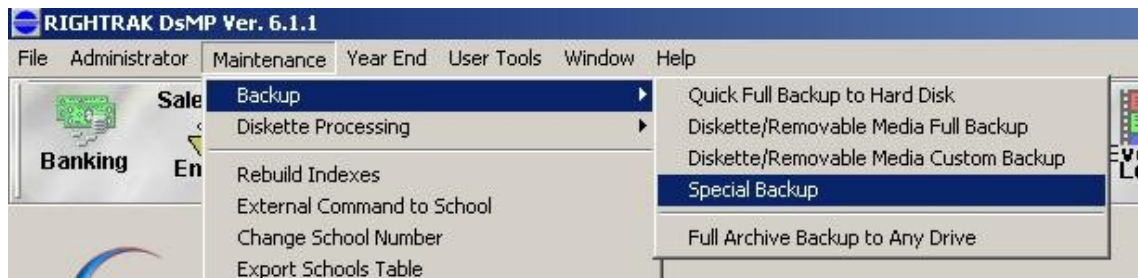
4. Click Do It



5. Click OK

As a safeguard, PCS recommends performing a Special Backup in addition to the removable backup outlined above. The Special Backup will be stored in the Dsmp quick backup folder with a unique name.

1. Launch the RIGHTrak Software if it is not open already.
2. Close any active windows and click Maintenance
3. Click Backup
4. Click Special Backup



5. Name your backup **24ST14** in the blank space.



6. Click Do It!

The backup process will close upon completion.

□ Step completed



DO NOT proceed to Step 14 until you confirmed that the student enrollment database has been rolled over for the current School Year.

Step 14. FR Bulk Eligibility Change

The **FR Bulk Eligibility Change** process was modified in order to comply with the new USDA guidelines. This option will keep the student's status until a new application is processed OR until the end of the grace period (typically at the end of the first 30 days of school). This STEP will also give you the option to clear the completed application 'STATUS' (has application Y or N). However, the application History will stay in RIGHTrak.

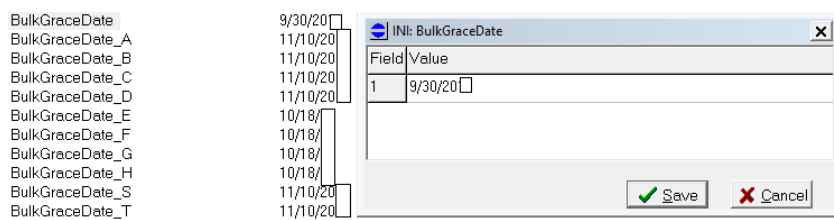
WARNING: You must change the FR Bulk Eligibility Expiration Date before performing this function.

Changing the FR Bulk Eligibility Expiration Date

Note: You must login to RIGHTrak with administrative rights to edit the configuration file.

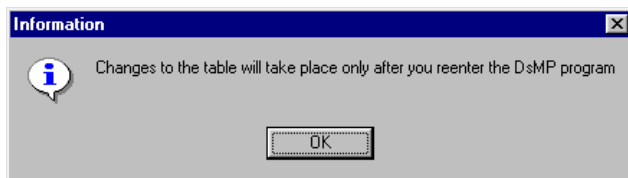
From the RIGHTrak Desktop

1. Click on Administrator
2. Click on Configuration File
3. Click on the FR_General Folder
4. Highlight (or double click) the BulkGraceDate
5. Edit the date so that it reflects **your** date of Temporary Eligibility expiration. The date below is an example **ONLY**.



6. Click on Save
7. Click on Save (top left corner)
8. Click Close

You will see the following pop-up message



9. Click OK to the message box
10. Close the Program Completely
11. Re-enter RIGHTrak

There are three flags in Rightrak that you will have to change according to your preference. They are under **Rightrak > Configuration File > FR_General**. The following flags will take effect when students move from CEP to Non-CEP schools:

RIGHTrak YEAR END PROCESS

FR Bulk Eligibility Change

Changing the FR Bulk Eligibility Expiration Date

FR_General	IncompleteGracePeriod	0
FR_Import	KeepBetterEligOnAppl	N
FR_Keypads	KeepBetterExpDateOnAppl	N
FR_UserRequired	KeepBetterExpDateOutOfBulk	N
FR_Verification	Manual_MistakeGracePeriod	10
GLEExport	ManualDCRT	Y
Import_From_Schools	MaxHouseSizeBeforeWarning	9
LaborCategory1	MixedApplAllowed	N
LaborCategory2	OutOfBulkGracePeriod	10
LaborCategory3	OutOfCEPGracePeriod	10
	OutOfProvGracePeriod	10

Terms and Definition

<u>KeepBetterEligOnAppl</u>	Y or N	Not Recommended to use. If a student is on an application and gets an eligibility, any future applications that would have an <u>adverse affect on the students</u> eligibility would be ignored if this was set to Y. You should check with your auditor before using this feature, as there can be exceptions to the rule.
<u>KeepBetterExpDateOutOfBulk</u>	Y or N	If the eligibility of a student is adverse, is the 10 days before or after the end of the grace period at the beginning of the school year. If set to Y, it would retain the grace period expiration if it was after the adverse time period.
<u>OutOfCEPGracePeriod</u>	10	Number of days a student maintains their eligibility when they are removed from a Provision school.

**If you are performing the FR Bulk Eligibility Change
for:**

PROVISION - skip to 14A
CEP - skip to 14B

[14A.- Editing PROVISION Schools](#) 

[14B.- Preparing CEP Schools \(Full or Partial\)](#) 

**After the above steps are completed to the needs of
the District, then continue to:**

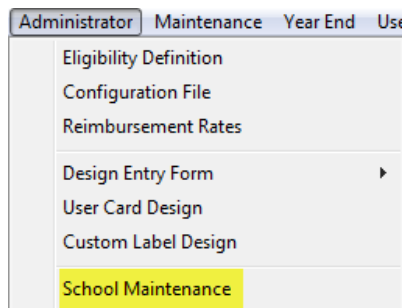
Expiring FR Bulk EligibilityPage 47

Step 14A. Editing Provision Schools

This procedure will provide instructions on how to add, remove and/or edit Provision Schools. **This must be performed before Expiring FR Bulk Eligibility Change.**

From the RIGHTrak Desktop

1. Click on Administrator



2. Click on School Maintenance
3. Highlight (or double click) the School that needs to be modified.
4. Select the PROVISIONS tab.
5. Edit the conditions according to the upcoming School Year.

Edit School - Alternative Center

Enrollment | Dialing | Government | Provisions |

Provisions Information

Breakfast <input type="radio"/> No Provision <input type="radio"/> Provision 1 <input checked="" type="radio"/> Provision 2 <input type="radio"/> Provision 3 <input checked="" type="checkbox"/> Provision Base Year	Lunch <input type="radio"/> No Provision <input type="radio"/> Provision 1 <input checked="" type="radio"/> Provision 2 <input type="radio"/> Provision 3 <input checked="" type="checkbox"/> Provision Base Year
Snack <input checked="" type="radio"/> No Provision <input type="radio"/> Provision 1 <input type="radio"/> Provision 2 <input type="radio"/> Provision 3 <input type="checkbox"/> Provision Base Year	Milk <input checked="" type="radio"/> No Provision <input type="radio"/> Provision 1 <input type="radio"/> Provision 2 <input type="radio"/> Provision 3 <input type="checkbox"/> Provision Base Year

IF a school is in the second year of provision, make sure to remove the check mark from Provision Base Year.

Non Base Year Provision Schools will **not** be set with an expiration date. These students will be set to F, R or P with a reason code of Provision I, II or III.

Base Year Provision Schools will be set with an expiration date and will keep the status until a new application is processed or the end of the Grace Period.

If you need assistance, call 1-800-247-3061 and select the option for the Support Department.

6. Click Update
7. Repeat steps 3 to 6 for every school that needs to be modified.
8. Close the School Maintenance Tab.



In order to start the new school year with a clean database, all CEP districts **MUST** first uncheck all CEP sites (*see instructions starting on page 45*), and then set all Eligibility Expiration Dates to 30 days after the start of school by running Expiring FR Bulk Eligibility (*see instructions on page 47*).

Following this process will assure that any students that were DCRT in previous years and are not DCRT in the current year will have correct eligibilities and that any F&R Applications that may be in the system for students in CEP schools will no longer be recognized by the system.

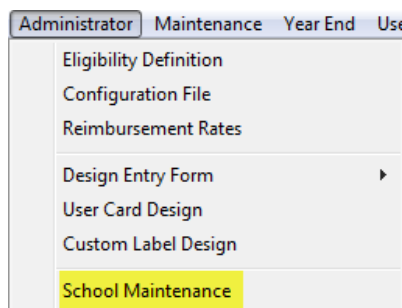
If you need further assistance, please contact PCS support at (800) 247-3061.

Step 14B. Preparing CEP Schools (Full or Partial)

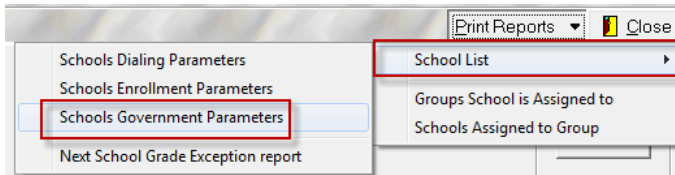
If you have setup Provision II as CEP on previous school year, please follow the same instructions on printing the CEP list and removing the CEP from schools.

A.- Print CEP List

1. Before continuing, you **MUST** print a report of all of the school's provisions. Go to **Administrator > School Maintenance**.



- On the **School Maintenance** menu, press **Print Reports > School List > Schools Government Parameters**.



- On this report, you can see if any of your schools are running **Provisions**. **Print this report.**

Breakfast		Lunch		Government Subsidy		Snack		Supper	
Federal	<input checked="" type="checkbox"/>	Federal	<input checked="" type="checkbox"/>	Federal	<input type="checkbox"/>	Federal	<input type="checkbox"/>	Federal	<input type="checkbox"/>
State	<input checked="" type="checkbox"/>	State	<input checked="" type="checkbox"/>	State	<input type="checkbox"/>	State	<input type="checkbox"/>	State	<input type="checkbox"/>
Fed. Severe Need	<input type="checkbox"/>	Fed. Severe Need	<input type="checkbox"/>	Fed. Severe Need	<input type="checkbox"/>	Fed. Severe Need	<input type="checkbox"/>	Fed. Severe Need	<input type="checkbox"/>
St. Severe Need	<input type="checkbox"/>	St. Severe Need	<input type="checkbox"/>	St. Severe Need	<input type="checkbox"/>	St. Severe Need	<input type="checkbox"/>	St. Severe Need	<input type="checkbox"/>
Any Provision	<input checked="" type="checkbox"/>	Any Provision	<input checked="" type="checkbox"/>	Any Provision	<input checked="" type="checkbox"/>	Any Provision	<input checked="" type="checkbox"/>	Any Provision	<input checked="" type="checkbox"/>
Prov. Base Year	<input type="checkbox"/>	Prov. Base Year	<input type="checkbox"/>	Prov. Base Year	<input type="checkbox"/>	Prov. Base Year	<input type="checkbox"/>	Prov. Base Year	<input type="checkbox"/>

Save this copy for when you are ready to add the CEP option to the CEP schools.

The report will show the CEP schools as Any Provision.

- Close** the report and go back to the **School Maintenance** tab.

B. Removing CEP from CEP Schools

- Highlight (or double click) a CEP school to edit it.
- Select the **Provisions** tab.
- Change from **CEP** to **No Provision for all meal types (Breakfast, Lunch, Snack, Supper)**. Make sure **Provision Base Year** is **NOT** checked off. **Press Update** when finished.

RIGHTrak YEAR END PROCESS

FR Bulk Eligibility Change

14B.- Preparing CEP Schools (Full or Partial)

Provisions Information

Breakfast	Lunch
<input checked="" type="radio"/> No Provision	<input checked="" type="radio"/> No Provision
<input type="radio"/> Provision 1	<input type="radio"/> Provision 1
<input type="radio"/> Provision 2	<input type="radio"/> Provision 2
<input type="radio"/> Provision 3	<input type="radio"/> Provision 3
<input type="radio"/> C.E.P	<input type="radio"/> C.E.P
<input type="checkbox"/> Provision Base Year	<input type="checkbox"/> Provision Base Year

Snack	Supper
<input checked="" type="radio"/> No Provision	<input checked="" type="radio"/> No Provision
<input type="radio"/> Provision 1	<input type="radio"/> Provision 1
<input type="radio"/> Provision 2	<input type="radio"/> Provision 2
<input type="radio"/> Provision 3	<input type="radio"/> Provision 3
<input type="radio"/> C.E.P	<input type="radio"/> C.E.P
<input type="checkbox"/> Provision Base Year	<input type="checkbox"/> Provision Base Year

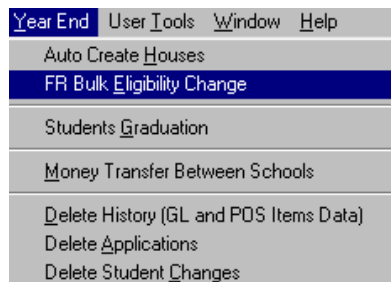
8. Repeat steps 5-7 for all CEP Schools.

□ Step completed

Expiring FR Bulk Eligibility

From the RIGHTrak Desktop Click on Year End

1. Click on FR Bulk Eligibility Change



2. Modify the screen to reflect the example below. You may wish to select additional setting based on your particular needs.

A screenshot of the 'FR Bulk Changes' dialog box. The dialog has a title bar 'FR Bulk Changes' and a red warning message at the top: 'Make Sure Provisional Schools are Set as of Next Year'. It contains several sections of checkboxes and dropdown menus. Annotations with red boxes and arrows point to specific elements: 1. A red box around the 'Include Only Students with no Application' checkbox with the text 'Make sure this checkbox stays EMPTY.' 2. A red box around the 'Temporary Eligibility Expiration Date' dropdown menu, which is set to '9/30/20', with the text 'Make sure this date is the correct EXP BULK DATE.' 3. A red box around the 'Clear Complete Appl Flag / on Houses with Applications dated before:' dropdown menu, which is set to '6/30/20', with the text 'Last day of Fiscal Year 20'. The dialog also includes buttons for 'Clear ErrorLog', 'View ErrorLog', 'Ok', and 'Close'.

Include Partial Provision II Students
Check this box if you have Provision II schools for breakfast only. If you are Provision II for breakfast only, families must re-apply every year for lunch.

Set Import Visit Flag- Clears the Import Exclude flag on all accounts currently set as Import Exclude.

Include Only Students with no Applications

Closed Accounts as Above- All closed account eligibilities will be changed as selected above.

Closed Accounts to None- All closed account eligibilities will be changed to N.

Clear Complete App Flag- Clears the completed application flag on all houses in preparation for the new year.

Clear Agree to Share Flag- Clears the Agree to Share flag on all houses in preparation for the new year.

Clear Block Check Flag- Removes check blocking on all accounts.

3. Click on OK. This process can take several minutes; do not try to stop it.
4. Click on Close after the Bulk Process is done.

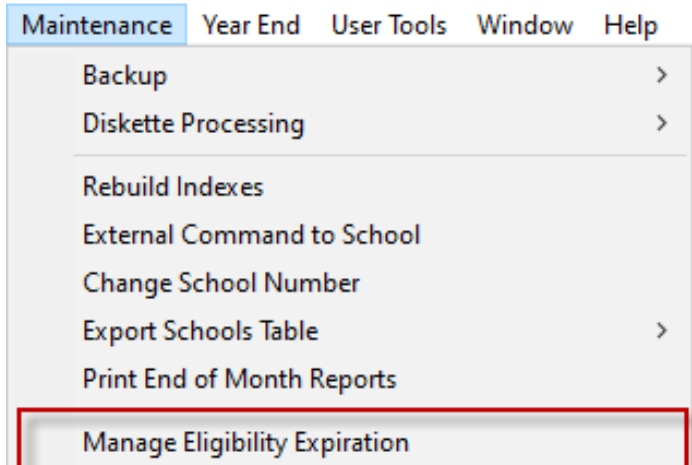


CEP Schools will be set with an expiration date and will keep the status until a new application is processed or the end of the Grace Period.

☐ Step completed

View the List of Expiring Eligibility

1. Click on Maintenance
2. Click on Manage Temporary Eligibility Expiration



3. Query on the Expiring Eligibility by entering date or use the dropdown arrow in **Elig Expire By Date**.

The screenshot shows the 'Temporary Eligibility Expiration' window. It has a 'Query Criteria' section with fields for Section, Homeroom, Name (Last, First, MI), Student ID, Elig., Elig. Reason, Active, House ID, Grade, School #, Elig. Expire After, Elig. Expire By Date (set to 9/30/20), and Not DCBT. A large red 'Q' icon is on the right. Below the criteria is a table of student data.

House ID	S	Student ID	Student Name	Sch#	Elig	Elig Reason	Changed On	Elig. Exp. Date	Next I
17583	A 44		on E	0043	TF	Bulk Change	3/10/2017	9/30/2017	N
3989	A 11		hur E	0043	TF	Bulk Change	3/10/2017	9/30/2017	N
16701	A 41		even	0043	TF	Bulk Change	3/10/2017	9/30/2017	N
4536	A 42		ary E	0043	TF	Bulk Change	3/10/2017	9/30/2017	N
8887	A 43		icole A	0043	TF	Bulk Change	3/10/2017	9/30/2017	N
4741	A 45		an R	0043	TF	Bulk Change	3/10/2017	9/30/2017	N
14776	A 12			0057	TR	Bulk Change	3/10/2017	9/30/2017	N
3258	A 45		ary L	0058	TF	Bulk Change	3/10/2017	9/30/2017	N
8744	A 10		Samantha J	0058	TR	Bulk Change	3/10/2017	9/30/2017	N
3989	A 12		neitzberg Danielle I	0043	TF	Bulk Change	3/10/2017	9/30/2017	N

On the right side of the window, there is a section with a dropdown for 'Elig. Exp. Date', a 'Change Exp Date' button, and an 'Expire Now' button.

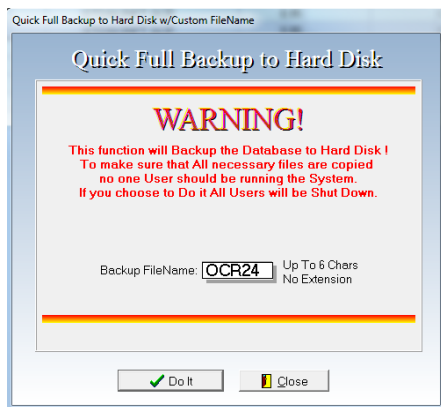
I-TOOL YEAR END PROCESS



**ONLY For Districts doing I-Tool Integration
(Scanning/ Online Free & Reduced Applications)**

Step 1. Perform Backup

1. Launch Rightrak
2. Click on Maintenance
3. Click on Backup
4. Click on Special Backup
5. Type in the name of the Special Backup. PCS suggests the name OCR24.



6. Click Do It

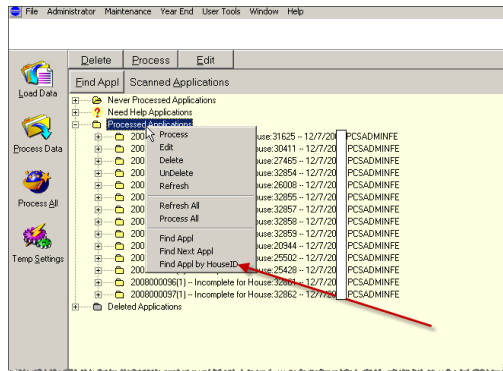


Step 2. Print Last Year's Application House ID Batch Reference Numbers

1. Launch the Itool Program
2. Click on Process Data



3. Right Click on Processed Applications
4. Click on Find Appl by House Id



Query for Applications by HouseID

House ID: Processed Date: ☐ Before ☒ On ☐ After

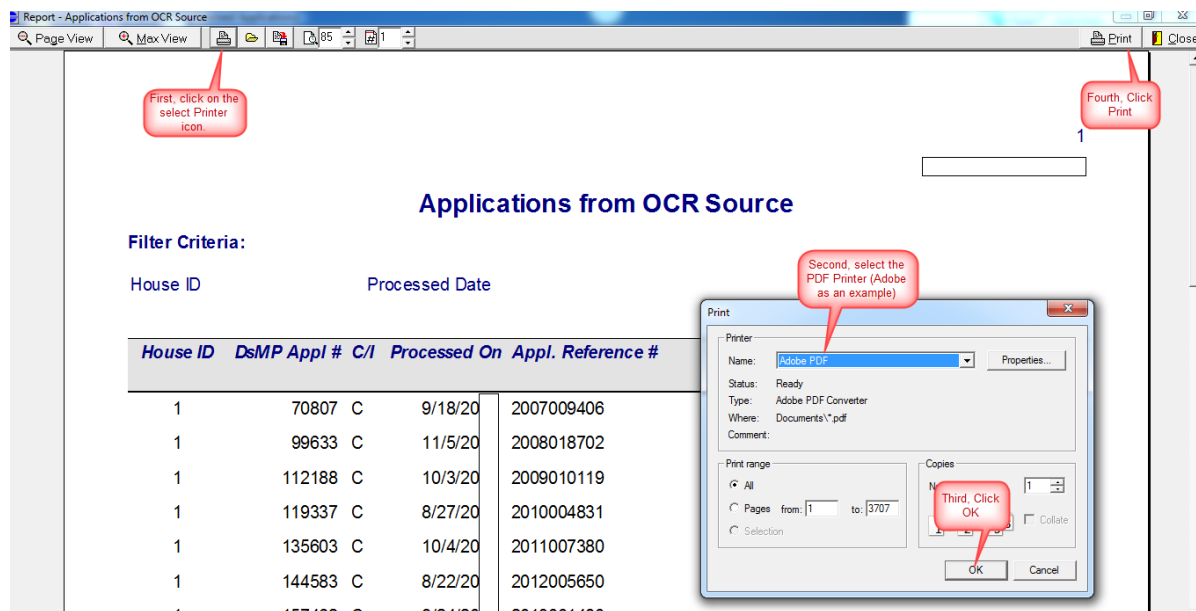
House	DsMP Appl #	C/I	Processed On	Appl Reference #	Image File
1	70807	C	9/18/20	2007009406	
1	99633	C	11/5/20	2008018702	
1	112188	C	10/3/20	2009010119	
1	119337	C	8/27/20	2010004831	
1	135603	C	10/4/20	2011007380	
1	144583	C	8/22/20	2012005650	
1	157462	C	8/24/20	2013001480	
2	70501	C	9/15/20	2007009091	
2	89833	C	9/11/20	2008007481	
2	104102	C	8/11/20	2009001411	

Remember to have a PDF writer configured...

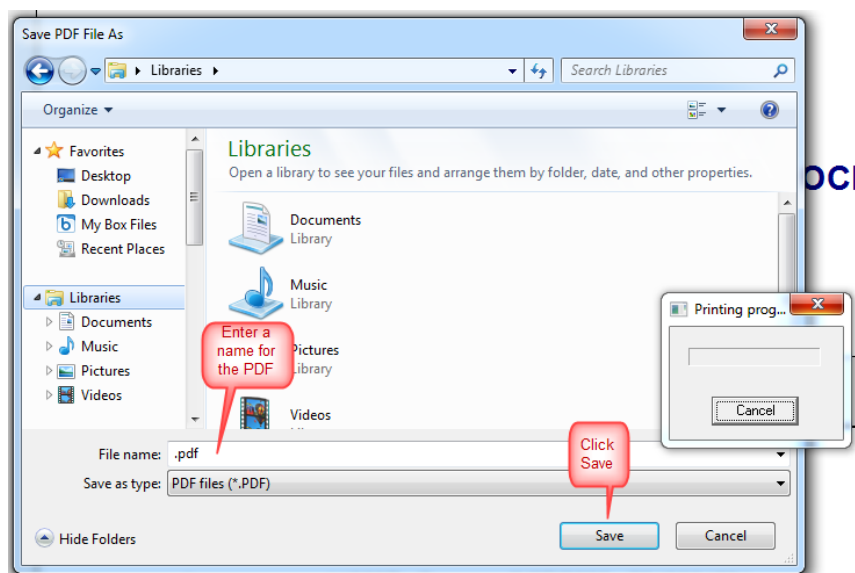
5. Click Print
6. If you are printing to a PDF Writer (Adobe, for example) Make sure it is configured as the default Printer.

I-Tool Year End Process

Print Last Years Application House ID Batch Reference Numbers



- Click the 'Select Printer' icon.
- From the list of Printers, select the PDF Printer (Adobe for example)
- Click OK
- Click Print
- The 'Save PDF File As' screen will appear
- Label the file
- Click Save.

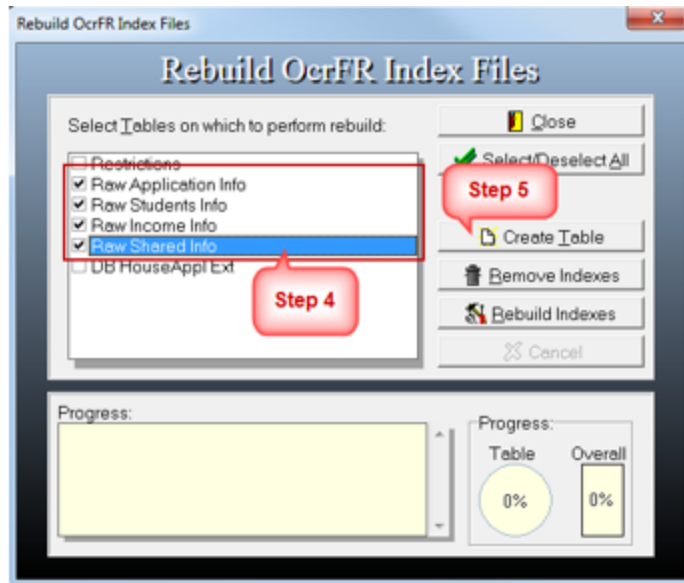


This will give you a list of all applications processed with corresponding House ID numbers and Batch Reference numbers. This list should be kept in a safe place in the event of an audit.

Step 3. Cleaning Up Last Years Applications

This will delete all of last year's applications within i-Tool. In the event of an audit you can provide the List that you have Save/ Print or restore from the backup (OCR24)

1. Open i-Tool
2. Click the Maintenance tab
3. Click the Rebuild Indexes tab
4. Select ONLY the following indexes:
 - a. Raw Application Info
 - b. Raw Students Info
 - c. Raw Income Info
 - d. Raw Shared Info
5. Click on Create Table
6. Click on OK
7. Click Close when done



□ Step completed

I-Tool Year End Process

Redirect the path for the SY 20XX-20XX Application Images

Redirect the path for the SY "20XX-20XX" Application Images

This Step is only for Districts that have the capability to view the **Scanned Application** Images through RighTrak and i-Tool. These Districts will have to change the path for the new Application Images. Usually, we only need to change the YEAR from the folder name (for the current SY, folder name is "20XX"). The changes will happen in RighTrak and i-Tool Configuration File.

In RighTrak:

1. Click the Administrator tab.
2. Click the Configuration File tab.
3. Go to Database.
4. Look for **RemoteScannedApplDir** then edit folder location or folder name.

For example:

```
RemoteScannedApplDir=\\vm-cn-apps\rsimages$\20XX\
```

In I-Tool:

1. Click the Administrator tab.
2. Click the Configuration File tab.
3. Go to OCRFR_DataBase.
4. Look for **ApplScannedImagesDir** and **ImageFileSubPathRemove** then edit folder location or folder name.

For example:

```
ApplScannedImagesDir=\\vm-cn-apps\rsimages$\20XX\
```

```
ImageFileSubPathRemove=\\vm-cn-apps\rsimages$\20XX\
```

Note: If you do not know the new path for the application images, please contact the scanning software.

☐ Step completed

☐ Step skipped



!!! WARNING DO NOT START THE YEAR START PROCESS UNTIL !!!

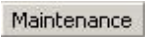

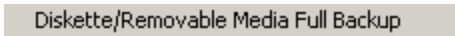
- ❖ YOU'VE RECEIVED AN ENROLLMENT FILE WITH FULL ROLLOVER FOR THE NEW YEAR.
- ❖ YOU'VE RECEIVED YOUR FIRST DCRT FILE FOR THE NEW YEAR.
- ❖ MAKE SURE THE INCOME.INI HAS BEEN UPDATED ACCORDING TO STEP 2 OF THE YEAR END PROCESS
- ❖ MAKE SURE TO RE-ENABLE THE CEP SCHOOLS IN THE SCHOOL MAINTENANCE MODULE IF NEEDED
- ❖ MOST DISTRICTS START THIS SOMETIME BETWEEN JULY & AUGUST BEFORE SCHOOL STARTS
- ❖ MOST SCHOOLS HAVE ALREADY BEEN SET UP TO AUTOMATICALLY TRANSFER MONEY SO THE MONEY TRANSFER STEPS OF THE YEAR START IS ENTIRELY OPTIONAL

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

RIGHTRAK YEAR START PROCESS


Step 1. Make a Backup

Make a backup of RIGHTrak and label the backup “**Backup RIGHTrak Year Start** (*insert upcoming year ex. 20XX*).” Save the backup in a safe place for audit purposes.

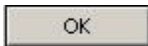
1. Insert the backup media, if the media is a Flash Drive, External Hard drive or thumb drive, make a note of the Drive letter.
2. Launch the RIGHTrak Software
3. Click Maintenance 
4. Click Backup 
5. Click Diskette/Removable Media Full Backup 



To change the drive letter double click in the box to highlight the drive letter or click in the box, delete or backspace over the letter, then type the appropriate drive letter.

6. Click Do It 

7. Click OK

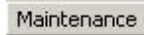


8.

As a safeguard, PCS recommends performing a Special Backup in addition to the removable backup outlined above. The Special Backup will be stored in the Dsmg quick backup folder with a unique name.

9. Launch the RIGHTrak software if it is not open already.

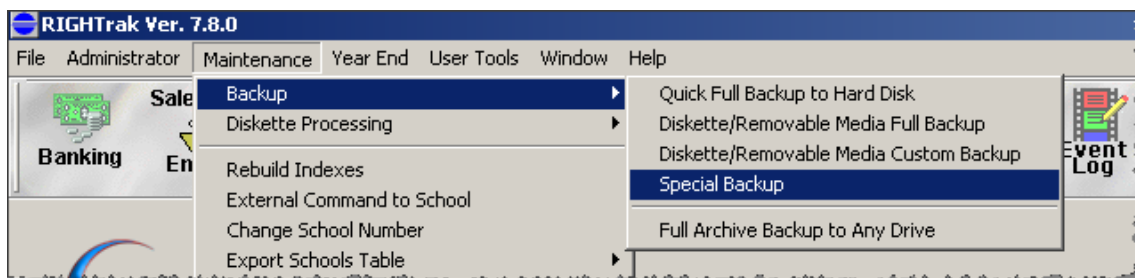
10. Close any active RIGHTrak windows and click Maintenance



11. Click Backup



12. Click Special Backup



13. Name your backup **YS(insert upcoming school year ex. 20XX)** in the blank space



RIGHTRAK YEAR START

Make a Backup

14. Click Do It!

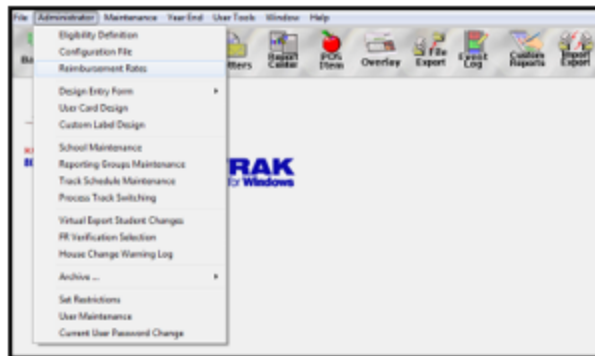


The backup process will close upon completion.

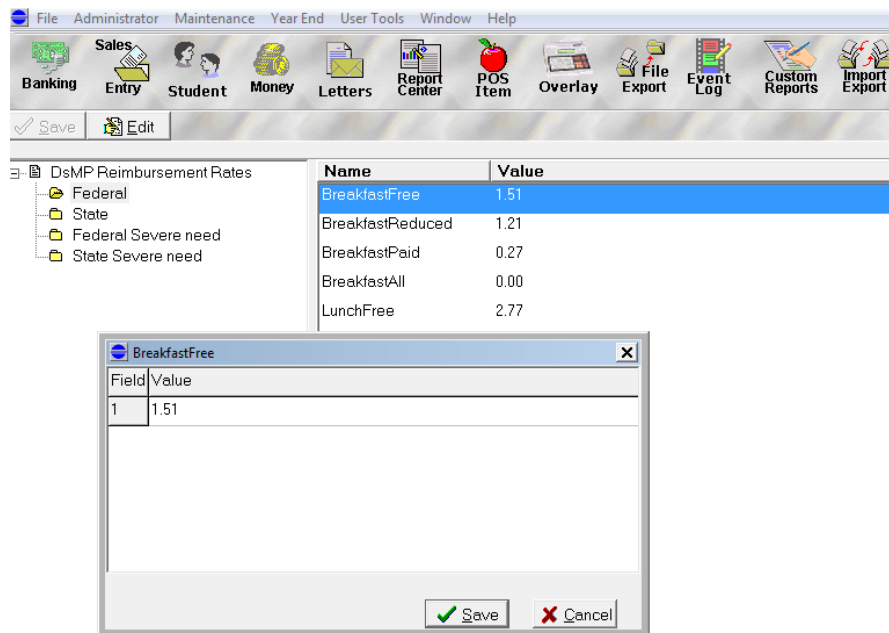
□ Step completed

Step 2. Update Federal Reimbursement Rates

1. Click on Administrator
2. Click on Reimbursement Rates



1. Click on the applicable Reimbursement Folders for your District
2. Highlight (or double click) the Reimbursement Rate you want to change in the right hand window.
3. Click on Edit



4. Edit the Value
5. Click Save
6. Repeat Steps 6 and 7 until finished
7. Click Save at the top left hand corner
8. Click Close
9. Click OK to the Information Box
10. Exit the Program completely

Note: You must exit and reenter the RIGHTrak program in order for the configuration file changes to take effect.

□ Step completed

Step 3. Adding CEP Option to CEP (Full/Partial) Schools

If the CEP Schools were set up as Provision II (not as CEP) last year, you can take this opportunity to utilize the CEP option and configure them as CEP. Please contact PCS Support for assistance at (800) 247-3061.

1. After running the **FR Bulk Eligibility Change**, refer back to the report you printed at the beginning of the process. [14B - Preparing CEP Schools \(Full or Partial\)](#) ⁴⁵
2. Highlight (or double click) a CEP school to edit it.
3. Select the **Provisions** tab.
4. Change from **No Provision** to **CEP** for all the meal types that were previously **Provision II** (Breakfast, Lunch, Snack, and Supper). Press Update when finished.

Provisions Information

Breakfast <input type="radio"/> No Provision <input type="radio"/> Provision 1 <input type="radio"/> Provision 2 <input type="radio"/> Provision 3 <input checked="" type="radio"/> CEP <input type="checkbox"/> Provision Base Year	Lunch <input type="radio"/> No Provision <input type="radio"/> Provision 1 <input type="radio"/> Provision 2 <input type="radio"/> Provision 3 <input checked="" type="radio"/> CEP <input type="checkbox"/> Provision Base Year
Snack <input type="radio"/> No Provision <input type="radio"/> Provision 1 <input type="radio"/> Provision 2 <input type="radio"/> Provision 3 <input checked="" type="radio"/> CEP <input type="checkbox"/> Provision Base Year	Supper <input type="radio"/> No Provision <input type="radio"/> Provision 1 <input type="radio"/> Provision 2 <input type="radio"/> Provision 3 <input checked="" type="radio"/> CEP <input type="checkbox"/> Provision Base Year

IF a school is in the second year of CEP, make sure to remove the check mark from Provision Base Year.

5. Repeat steps 2-4 for all CEP Schools.

Editing the Claim Percentages

6. **IF the Schools were 'previously' set up as CEP, the percentage will reappear after you 'mark' the schools as CEP.** For schools that are new to **CEP**, you will need to edit the claim percentages. After setting a school to **CEP**, press the **C.E.P%** button in the school maintenance menu. (Make sure the school you would like to edit is selected)



7. The **C.E.P % Annual Rates** will appear for **Free** and **Paid**. Edit them as necessary. Press **Save**.

Annual Rate	
CEP-%	
Name	Value
Free	0.00
Paid	0.00

8. Repeat Steps 6-7 for all **CEP** schools.

□ Step completed

RIGHTRAK YEAR START

Adding CEP Option to CEP (Full/Partial) Schools.

Step 4. Preparation for New Application Processing

The following procedures are PCS's suggestions for making Application Processing easier and less error prone.

Print the Entire Student Database

Print an entire student database, sorted by name and aggregated as a reference for incoming applications to identify house I.D. Numbers.

1. Click on Report Center



2. Click on the Accounts Tab

Student Info	Remark	Elig Change
...Alvarezo Jacques	F 03/10/00	
...Abid Hector M	F 03/10/00	

- Eligibility Mismatch Report
List of Students who have different Eligibility at the School and District Level
- Account Status Mismatch Rep
List of Students who have different Status at the School and District Level
- Eligibility Listing
List of selected Students showing Eligibility
- Students Data
List of selected Students showing Home Address

The Preview Report button allows you to view the report first on screen. If you do not want to Preview the report first simply click the Print Report button and the report will automatically print to the Printer.

- Click on Eligibility Listing
3. Click on Preview Report
 4. Click Print
 5. Exit Report Center

□ Step completed

Step 5. Send a Letter with Blank Application

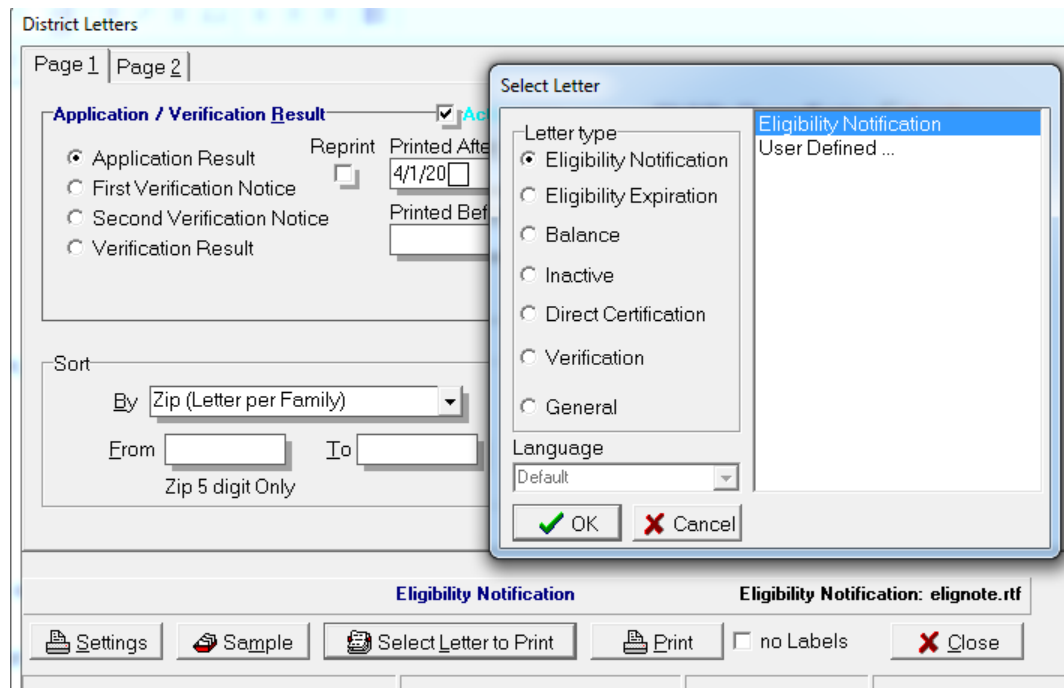
In order to make it easier to process new applications, you can send out a letter with the blank application to families indicating the system House I.D. Number in the letter asking them to use this number when filling out the new application.

From the RIGHTrak Desktop

1. Click on Letters



2. Click on Print Letters
3. Click Select Letter to Print tab
4. Select the Eligibility Expiration radio button
5. Application Request should be the highlighted letter
6. Click OK
7. Sort by House# in the Eligibility Expiration Criteria box
8. Click Print
9. Letters will start to print
10. Exit the Letters Section when your letters have finished printing.



The screenshot shows the 'District Letters' application window. A 'Select Letter' dialog box is open, displaying a list of letter types: Eligibility Notification (selected), Eligibility Expiration, Balance, Inactive, Direct Certification, Verification, and General. The 'Language' dropdown is set to 'Default'. The 'OK' button is highlighted. In the background, the main window shows the 'Application / Verification Result' section with 'Application Result' selected. The 'Sort' section shows 'By Zip (Letter per Family)'. The 'Print' button is visible at the bottom.

□ Step completed

RIGHTRAK YEAR START

Make a Back Up (Before New Enrollment file)

Step 6. Make a Back Up (Before New Enrollment file)

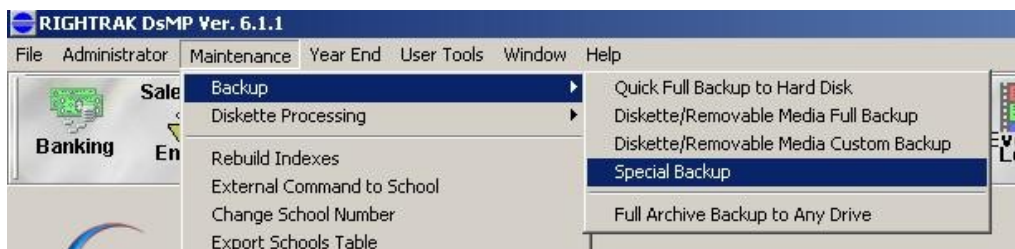
WARNING: Before performing this step, please verify the Student Database (Enrollment File) has been updated with the upcoming school year information.

Label your backup media "Backup RIGHTrak Year (*insert current school year ex. 20XX-20XX*)" Before New Enrollment.

For backup steps, please refer to Step 1 of the Year End/Year Start.

As a safeguard, PCS recommends performing a Special Backup in addition to the removable backup outlined above. The Special Backup will be stored in the Dsmp quick backup folder with a unique name.

1. Launch the RIGHTrak Software if it is not open already.
2. Close any active Dsmp windows and click Maintenance
3. Click Backup
4. Click Special Backup



1. Name your backup 25YS07 in the blank space



2. Click Do It. The backup process will close upon completion.

☐ Step completed

RIGHTRAK YEAR START

Make a Back Up (Before New Enrollment file)

Step 7. Process New Enrollment Information

Take the download as close as possible to the new school year, or as soon as the enrollment system includes only the upcoming school year's information.

The RIGHTrak Database should be updated with the latest student information available including New School Assignments, New Grades etc.

School Districts that have been processing downloads throughout the year should follow the same download procedure steps.

Import Student Database

Lines Processed:	0
Records Updated:	0
Records Inserted:	0
Records rejected	0

Time Elapsed:	00:00:00	Process Started:	
Est. Time Remaining:	00:00:00	Average Speed:	0 Students Per Minute

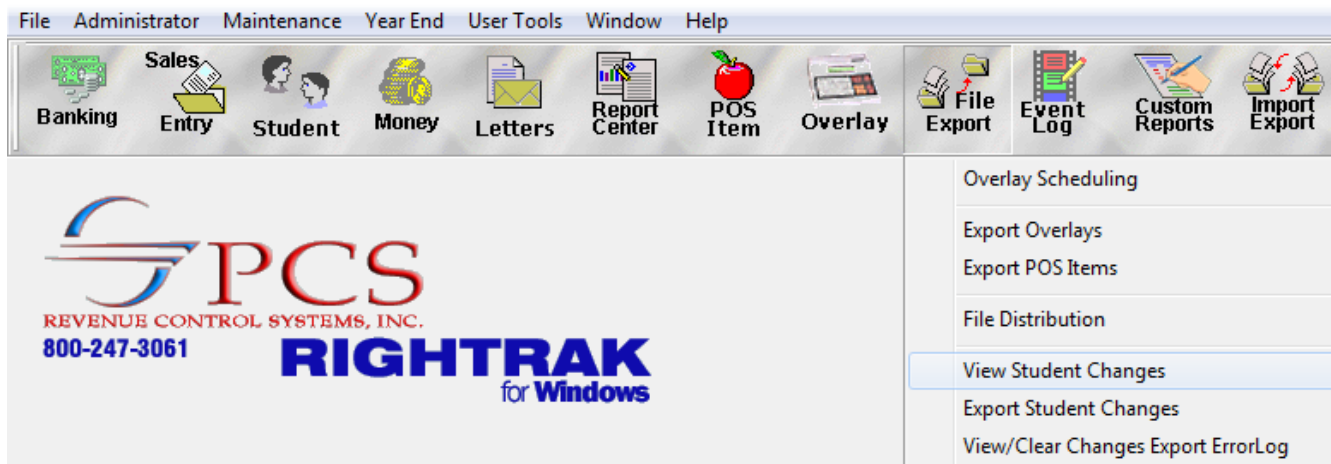
Progress:

❑ Step completed

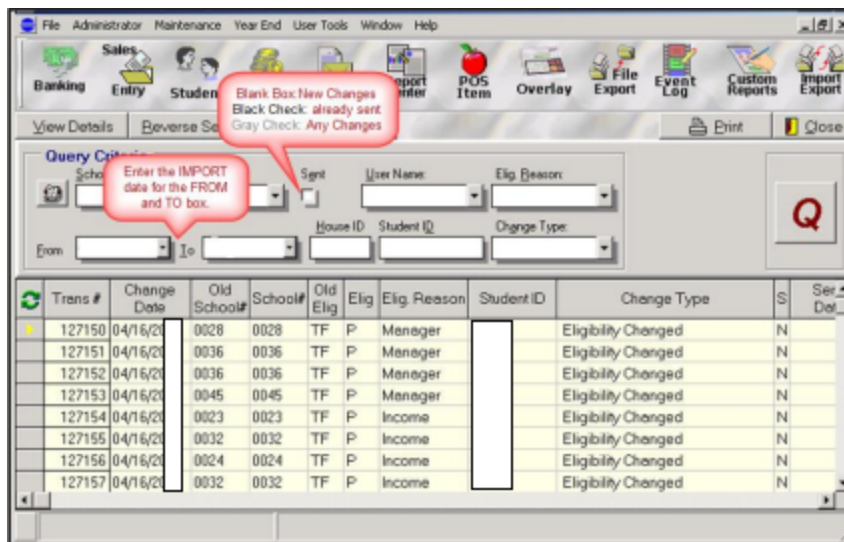
Step 8. Export Student Changes

To preview the student changes before exporting

1. Click on the File Export Button
2. Click on View Student Changes



This screen will show all the student changes from the new download. This screen allows you to view or print the changes.



Note: For those districts that are currently using our COMTrak Communication Module, It may be necessary to enter a gray check mark and query based on the date of import since COMTrak **may have automatically sent all available changes.**

To update schools with the new enrollment information

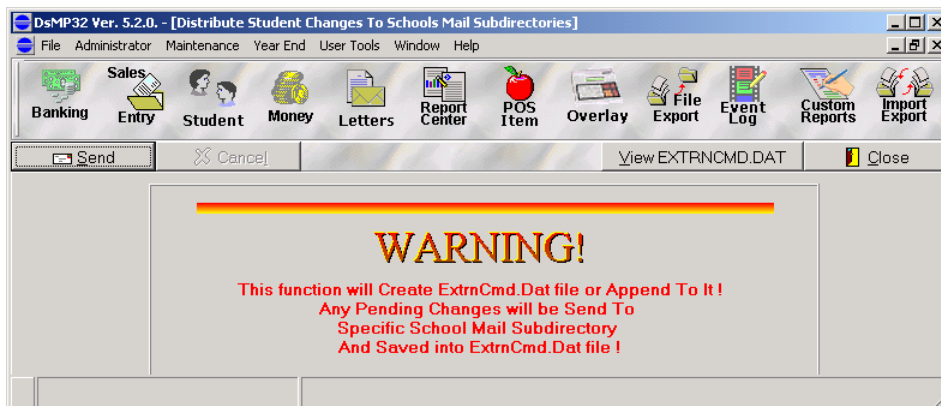
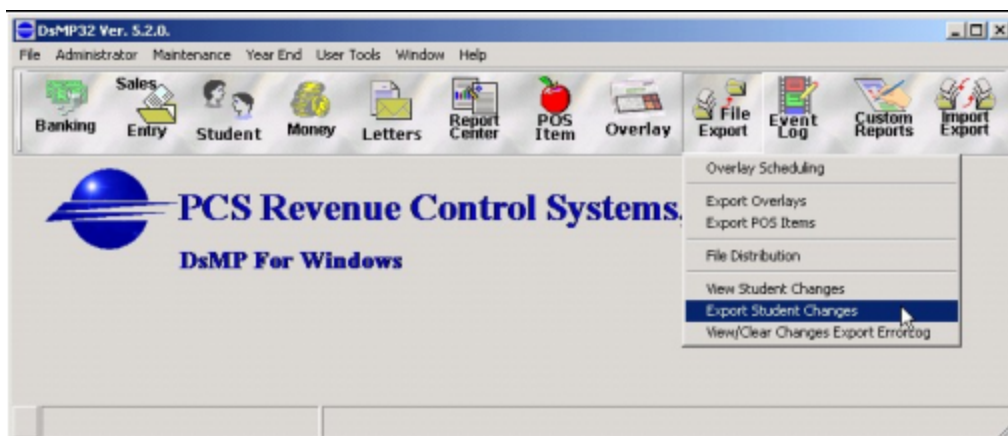
RIGHTRAK YEAR START

Export Student Changes

1. Click on the File Export Button



2. Click on Export Student Changes



3. Click on the Send Tab
4. Click on Close

Now is the time to perform Direct Certification. Remember to perform your nightly process after Direct Certification.

Please contact PCS Technical Support at your earliest convenience if you need assistance importing your Direct Certification File. Please have your DCRT file available prior to calling and verify that the file is the correct DCRT file for the current school year.

□ Step completed

Step 9. **Make a Back Up (Before running Compare process)**

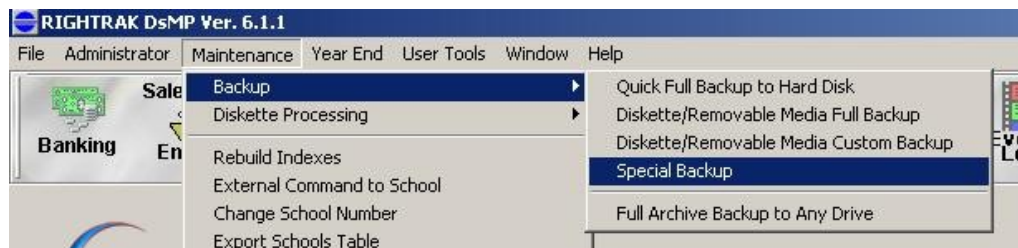
WARNING: Before performing this step, please verify the Student Database (Enrollment File) has been updated with the upcoming school year information.

Label your backup media "Backup RIGHTrak Year (*insert upcoming school year ex. 20XX-20XX*)" Before running Compare.

For backup steps, please refer to Step 1 of the Year End/Year Start.

As a safeguard, PCS recommends performing a Special Backup in addition to the removable backup outlined above. The Special Backup will be stored in the Dsmp quick backup folder with a unique name.

1. Launch the RIGHTrak Software if it is not open already.
2. Close any active Dsmp windows and click Maintenance
3. Click Backup
4. Click Special Backup



1. Name your backup 25YS10 in the blank space



2. Click Do It. The backup process will close upon completion.

□ Step completed

Step 10. Run a Compare (Optional)



WARNING: Perform this function only if you received and imported a complete download from your enrollment system.

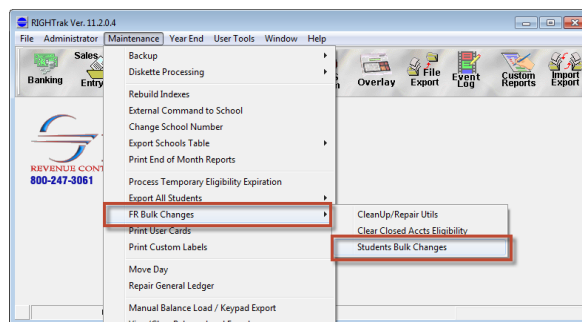
The Compare Function will enable the automatic graduation of students no longer active in the student enrollment system. It is a two-step process in which a comparison is made between the RIGHTrak database and the download file from your student enrollment system.

Before you start, confirm that all students that are part of the RIGHTrak system *but* not part of the student enrollment system (added manually) are marked as **Import Excluded.**

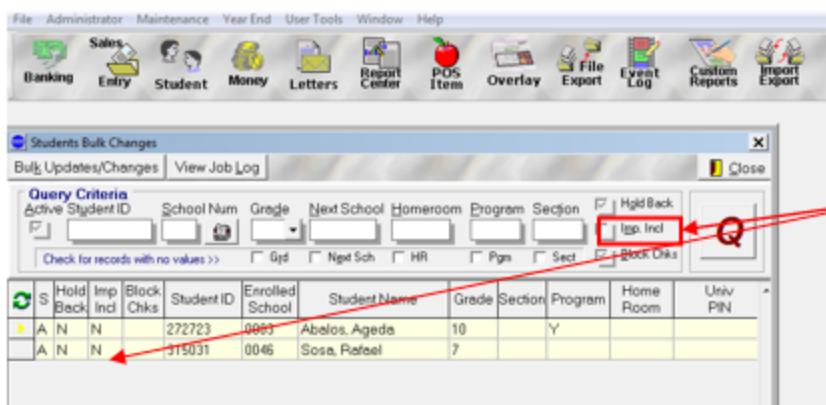
Note: Manually added students are automatically set to Import Excluded.

How to marked students as Import Excluded

1. Click Maintenance
2. Click on FR Bulk Changes
3. Click on Student Bulk Changes



1. Remove the check mark from the Imp Incl box and click the big Q (the screen will display the students that were add manually)

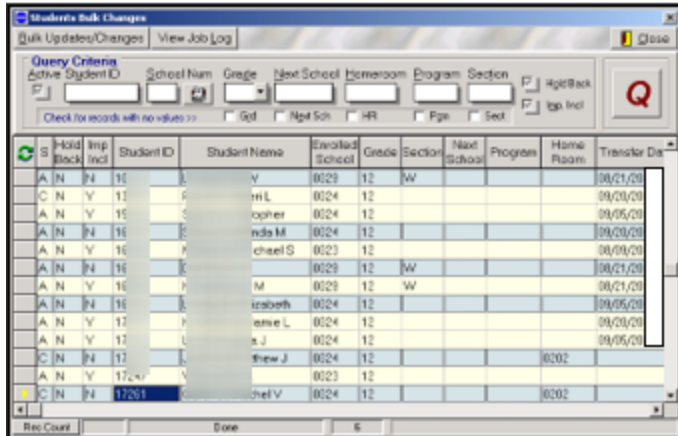


The Imp Incl Column indicates if the student is Import Included or not.

N= Not Included in the Enrollment Download. Student will not be closed by the compare process.

Y= Yes Included in the Enrollment Download. Student will be closed by the compare process if not listed in the download.

2. Click the Big Q
3. Highlight the Student Records

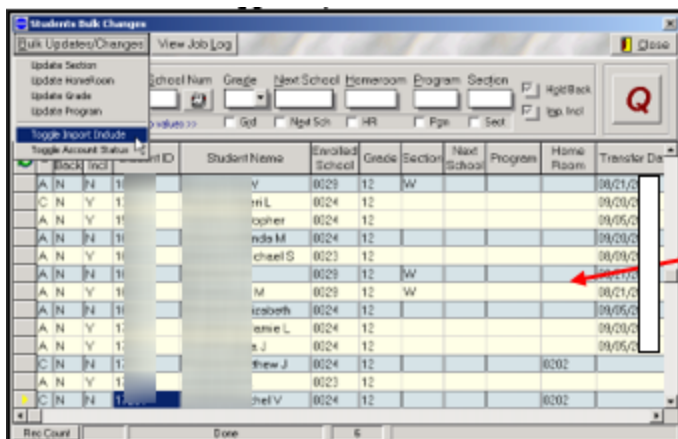


This section will allow you to select one or multiple students at one time and toggle their Import Include status.

Hold the Ctrl Key on the keyboard down while clicking with the mouse on each student. This will allow you to highlight one student at a time.

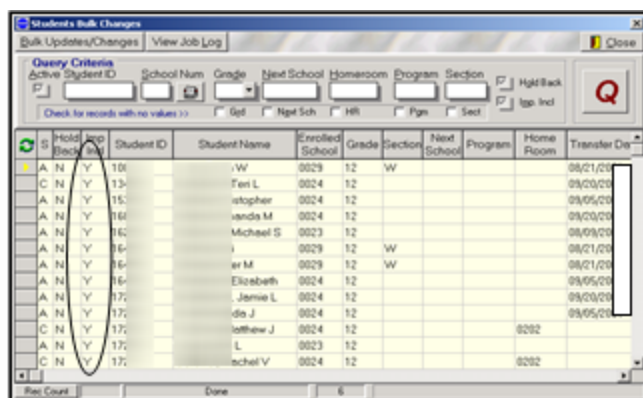
Once your Selections are made

4. Click on the Bulk Updates/Changes Tab
5. Click on Toggle Import Include



The highlighted students in this example are Import Excluded and are not included in the Enrollment Download.

This will Toggle the Imp Incl to a N or Y depending on your selection.



This Example shows that the Enrollment Download will modify all students listed.

RIGHTRAK YEAR START

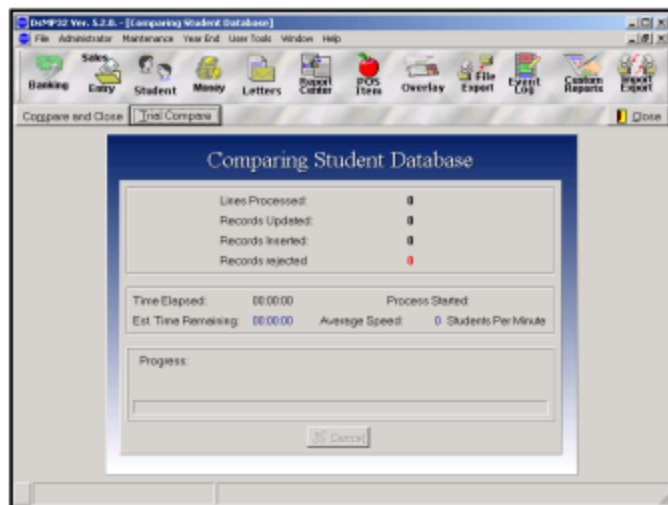
Run a Compare (Optional)

From the RIGHTrak Desktop

1. Click on the Import Export Button



2. Click on Compare Student Database with Import
3. Click on Trial Compare (wait until the process indicates Done)
4. Click on Compare and Close



Trial Compare allows you to test the compare process for errors before you permanently change the database.

Rejected Records are normal, however, if you have the same number of Lines Processed and Records Rejected or Records Updated, you should confirm that Step 3 has been completed. Consult the View/Clear Student Compare Error Log (under the Import/Export Button) and contact PCS Technical Support if you need additional assistance.

5. Verify the number of Closed Records
6. Click on Close

Note: The compare process can be configured as part of the Nightly Procedure. However, PCS doesn't recommend this function unattended because it could CLOSE wrong accounts (mainly because the students were not part of the download file).

- ☐ Step completed
- ☐ Step skipped

Step 11. Money Transfer

A. Money Transfer Made Easy



District using our Automatic Money Transfer should NOT perform this process. The Money will follow the students to their new location. If your District is not configured, please contact the Support Department at (800) 247-3061, select option 3.

You may confirm your Balance Auto Transfer Setting by clicking on:

1. Administrator
2. Configuration File
3. Import From Schools
4. Balance Auto Transfer is enabled if your flag is set to a Y

GLEExport	Name	Value
Import_From_Schools	BalanceAutoTransfer	Y
LaborCategory1	BalanceAutoTransferDays	0
LaborCategory2	BalanceEnLogIncWarnings	N
LaborCategory3	BalanceEnLogPerSchool	N
LaborCategory4	GLDataEnLogPerSchool	N
LaborCategory5	ItemHistEnLogPerSchool	N
LaborCategory6	OverwriteCustomRep	N
LaborCategory7	ProcessDOSDr	Y
LaborCategory8	ProcessDOSDRorD2	DR
LaborCategory9	WaitTimesToClear	3

The following series of events must happen in the following order to ensure your success.

1. Perform Year End at all schools. Year End creates the balance file that provides the account balance information for RIGHTrak. The BALANCE file MUST contain ALL accounts.
2. Communicate the balance files up to the district.
3. Process the Balance Files in RIGHTrak
4. Check the Balance Upload Status Report in RIGHTrak to see that ALL schools have processed their Year End balance files.

DO NOT CONTINUE UNTIL ALL SCHOOLS IN THE BALANCE UPLOAD REPORT HAVE A BALANCE DATE THAT CORRESPONDS WITH FASTRAK YEAR END.

<u>Sch Number</u>	<u>Sch Name</u>	<u>Last Bal Up Date</u>	<u>Proc Date</u>
0001	Jefferson	08/11/	✓

These are old dates. The dates **MUST** correspond to the date on which you performed Year End at each school.

RIGHTRAK YEAR START

Money Transfer

Money Transfer

IF THE LAST BALANCE UPLOAD DATE FOR ALL SCHOOLS DOES NOT CORRESPOND WITH FASTRAK YEAR END, you will need to see if there are unprocessed balance files.

- Go to Maintenance
- Manual Balance Load / Keypad Export
- Click Do It



Manual Balance Load / Keypad Export
View/Clear Balance Load Error Log
View/Clear Balance Exist Log
View/Clear Keypad Export Error Log
View/Clear StdItems Export Error Log

Return to the Balance Upload Status Report and verify whether any Balance Upload Dates have been modified after running the Balance Upload function.

Balance Upload Report

Page: 1

As Of Date: 6/30/2016
Sort By: School Number

School Number	School Name	Last Balance Upload Date	Processed As Of Date
0007	Pre Makati	No Bal Upload Date	
0027	Roman E	1/3/20	✓
0028	Coron	1/3/20	✓
0029	Boracay	1/3/20	✓
0030	Davao	1/3/20	✓

If your balance dates now correspond with your FASTrak Year End dates, you may now continue with your steps to have a successful Money Transfer!

NOTE: Make sure the enrollment file was taken already and that the students graduated to the next grade. You can check a student you know is moving to a new school in the money button.

S	Student Name	Student ID	Enroll Sch.	Grd	Elig	Elig. Reason	Block Chk	Reprt Sch	Reported Balance	Reported Adjust.
A. Asiland, Krista	162580	0054		N				0054	\$0.00	\$0.00
A. Asiland, Brenda J	162580	0054	6	R	Income			0054	\$0.00	\$0.00
A. Asiland, Christine	162580	0034	2	R	Income			0034	\$0.00	\$0.00

Student	Reported from: 0054	On: 1/3/20
Student ID: 162580	Last Eaten	Balance: \$0.00
Enrolled Sch: 0054	on: 6/22/20 9:4	Brk: 12/16/20
Eligibility: R	as of: 8/12/20	Lunch: 1/3/20
Grade: 6	Supper:	Sch.Adj.Only:
Section:	Snack:	Payment: \$5.00
Homeroom:	ALC: 5/9/20	Elig: 8
		Univ.PIN: 4405
		on 1/11/20 check

Notice His enrolled school should be the new school and his reported balance school should be the old school.

Now you are ready to do Money Transfer!!!

B. Year End Money Transfer with Summer School Made Easy

If running summer school, the following scenarios need to be defined:

- Will the students use their year round account balances in summer school?
- Will you use an existing FASTrak or will you setup a new one?

Students WILL NOT use their current year round account balances during Summer School

Assuming we want the Year end balances to transfer to the New Year and that balances are NOT used during the summer.

- Process the balances from year end.
- DO NOT create or process balances from summer school. Turn off Balance in the Eligibility table. (Make sure to turn it back on after summer school is over.)
- Import student information to move the students to summer schools.

Enjoy Summer School!!!

- Import Students for the New School Year.
- Do Year End Money Transfer
- Communicate with the schools as normal.

If you are using the balance during summer school:

- Process balance files from year end
- Import the enrollment file with summer school information
- Do Year End Money Transfer
- Communicate with the ALL schools

Enjoy summer school

- Do a year end at summer school creating NEW Balance files from ALL schools
- Process balance files
- Import New Year enrollment file
- Do Year End Money Transfer, use the balance date of year end at the summer schools
- Communicate with schools as normal.

RIGHTRAK YEAR START

Money Transfer

Year End Money Transfer with Summer School Made Easy

C. Money Transfer

1. Click on the Year End Section of the Menu Bar
2. Click on Money Transfer Between Schools
3. Enter the Earliest Year End Balance Date

Year End Money Transfer

Initiate \$ Transfer Process View/Clear Error Log Close

Money Transfer Viewing \$ Transfer Result

Enter Earliest Balance Date of Year End at School 6/5/20 School 6/5/20

Total Students :	0
\$ Transfers Processed Now :	0
\$ Transfers Already Initiated :	0
\$ Transfers Failed :	0

Progress:

Cancel

In this Example, the first School's Year End was performed on June 5th

4. Click on View/Clear Error Log

Note: The Transfer Log is appended to; if you do not want to clear the log just remember to scroll down to the section that starts the Year End Transfer.

Text File Viewer

Find Find Next Clear Print Close

A Std:45445 Transferred to School:0043 on 6/22/20 10:44:51 PM has Bal:48.7 Reported from School:0099 as of 1/3/20
Balance Out Of Date
Transfer Date Before Selected Balance Date
A Std:45683 Transferred to School:0043 on 7/9/20 11:35:00 AM has Bal:28.7 Reported from School:0099 as of 1/3/20
Balance Out Of Date
Transfer Date Before Selected Balance Date
C Std:45729 Transferred to School:0043 on 6/22/20 10:44:55 PM has Bal:35 Reported from School:0099 as of 1/3/20
Balance Out Of Date
Transfer Date Before Selected Balance Date
Closed Account
A Std:45951 Transferred to School:0043 on 7/9/20 11:36:40 AM has Bal:9.45 Reported from School:0099 as of 1/3/20
Balance Out Of Date
Transfer Date Before Selected Balance Date
A Std:46011 Transferred to School:0043 on 6/22/20 10:44:55 PM has Bal:40.3 Reported from School:0099 as of 1/3/20

Line: 1 Col: 1

5. Click on Clear
6. Click on Close
7. Click on Initiate \$ Transfer Process Tab

Enter Earliest Balance Date of Year End at School: 05/15/2000

Total Students: 15046
 \$ Transfers Processed Now: 594 59 of them - Negative Bal
 \$ Transfers Already Initiated: 0
 \$ Transfers Rejected: 51
 \$ Transfers Failed: 8

Progress: Year End Money Transfer between Schools...
 Done.

This is just an example date. The Balance Date you supplied in the previous step will carry over.

8. Click on Viewing \$ Transfer Results

Cl	Trans#	Date	Amount	From School	To School	Student ID	Note
----	--------	------	--------	-------------	-----------	------------	------

Show/Hide Past Money Transfer

When you enter this screen for the first time, you must click the tab to show the results.

9. Click on Show/Hide Past Money Transfer Tab

Cl	Trans#	Date	Amount	From School	To School	Student ID	Note
N	2704	05/08/20	11 (\$1.75)	0025	0031	627196	Year End Money Transfer
N	2705	05/08/20	11 (\$1.75)	0025	0031	627199	Year End Money Transfer
N	2706	05/08/20	11 (\$1.75)	0025	0031	627200	Year End Money Transfer
N	2707	05/08/20	11 (\$5.25)	0025	0031	627202	Year End Money Transfer
N	2708	05/08/20	11 (\$1.25)	0025	0031	627206	Year End Money Transfer
N	2709	05/08/20	11 \$6.80	0025	0031	627225	Year End Money Transfer
N	2710	05/08/20	11 \$2.30	0025	0031	627275	Year End Money Transfer
N	2711	05/08/20	11 \$2.50	0025	0031	627276	Year End Money Transfer
N	2712	05/08/20	11 (\$4.50)	0025	0031	627280	Year End Money Transfer
N	2713	05/08/20	11 \$2.00	0025	0031	627282	Year End Money Transfer

Show/Hide Past Money Transfers

This view will show you from school to school and the Student ID associated with it.

The Dates shown here are just examples.

10. Click Close

RIGHTRAK YEAR START

Money Transfer

Money Transfer

To view or print the Money Transfer by Name

1. Click on the Money Button



2. Click on Money Transaction Log
3. Set the Date when Money Transfer was performed

Trans. Number	Date	Time	Transaction Type	Amount	From Sch.	To Sch.	Student ID	StudentName	Cl	Note
1	08/09/20	4:01 pm	Money Transfer	\$9.85	0021	0029	17	Riche	Y	Year I
2	08/09/20	4:01 pm	Money Transfer	\$0.95	0020	0024	19	Jennit	Y	Year I
3	08/09/20	4:01 pm	Money Transfer	\$0.20	0022	0024	19	Temn	Y	Year I
4	08/09/20	4:01 pm	Money Transfer	\$0.80	0020	0024	19	Trenti	Y	Year I
5	08/09/20	4:01 pm	Money Transfer	\$0.05	0022	0024	21	Sarah	Y	Year I
6	08/09/20	4:01 pm	Money Transfer	\$0.55	0021	0029	21	Antho	Y	Year I
7	08/09/20	4:01 pm	Money Transfer	\$12.50	0028	0029	21	Mark	Y	Year I

4. Click the Big Q
5. Click Close when Finished

- ❑ Step completed
- ❑ Step skipped

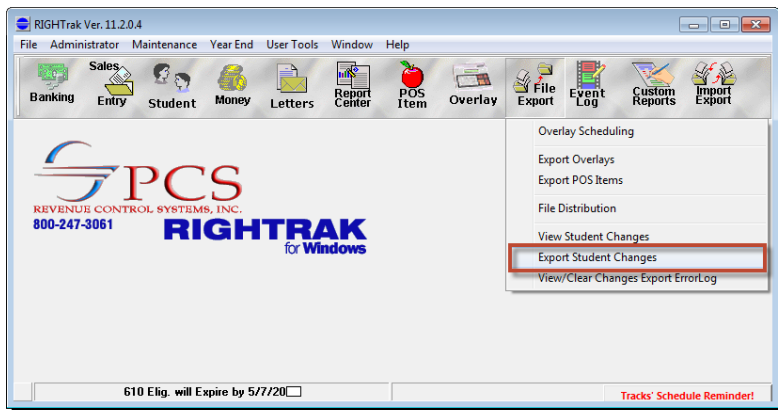
Step 12. Export Student Changes (Send to Schools)

NOTE: This Step is NOT necessary to perform if you are using Mobility (COMTrak)

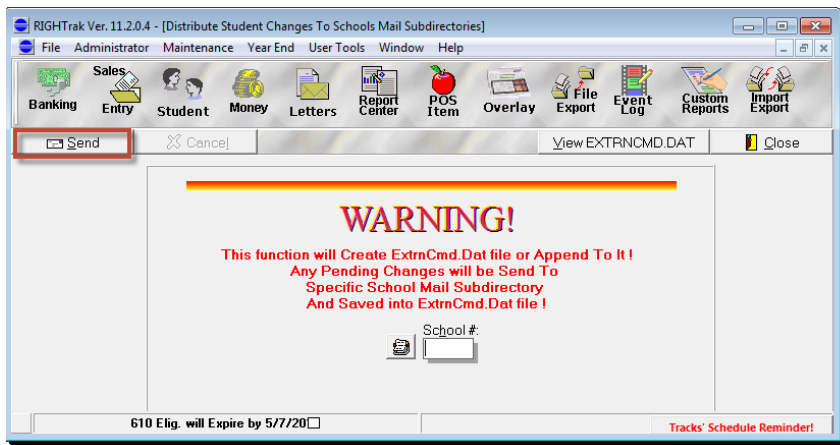
1. Click on the File Export Button



2. Click on Export Student Changes



3. Click on the Send Tab



4. Click on Close

□ Step completed

Step 13. Accept Data at Schools Prior To School Start

A few days prior to the start of school, the school computer must be turned ON and perform Wan Connection before opening FASTrak. If you are using Mobility (COMTrak) make sure it's ON before the schools open FASTrak. Once communication takes place, you may enter FASTrak to begin processing the data. This file may be large and therefore take some time to process.

The changes received by the school will include the transfer of students from school to school, the change of grade assignment, temporary meal status and transfer of balances. All this is assuming the previous steps have been completed.

Once the processing is completed at the schools, an adjustment report may be printed to verify money has been transferred, correctly. You should also upload all balances if you plan to print Keypad Notes in the Central Office.

Keypad cards should be distributed prior to the start of school.

If you are mailing postcards from Central Office to students regarding their new numbers and balances or if you are printing Keypad Cards at the Central Office, this is the time to complete this function, as there are many additional steps required.

If you have any questions or concerns about printing keypad cards, please contact PCS Technical Support at (800) 247-3061.

□ Step completed

Step 14. Entering Applications

You are now ready to enter new applications. If you are using i-Tool, MAKE sure the Year-End was completed successfully.

The screenshot shows the 'Application of 123456789 James Buffett' window. It includes a 'Query Criteria' section on the left with fields for Name, SSN, House ID, Student ID, and Section. The main area displays application history, determination details (Free below, Reduced below, Total Income), and student members. The 'Student Members' table lists students with their SSNs, names, and income details.

S	SSN	Name	Fstr	From	Reason	To	Reason	Exp Date	N...	Case #	Case ...
A		Buffett Jimmy	N	N	F		Income				
A		Buffett Savannah Jane	N	N	F		Income				

The screenshot shows the 'i-Tool OcrFR Ver. 4.8.0' interface. It includes a menu bar with 'File', 'Administrator', 'Maintenance', 'Year End', 'User Tools', 'Window', and 'Help'. The main area displays the 'PCS i-Tool for F&R Data Integration' logo and contact information for PCS Revenue Control Systems, Inc. (800-247-3061). There are also buttons for 'Load Data' and 'Process Data'.

□ Step completed

Step 15. Eligibility Letters for the New Year

This function allows you to print Eligibility letters prior to the end of the 30 operational day carryover period. This function will print eligibility expiration notices for all households that were on the Free and Reduced Program last year, but have not yet submitted an application for the current year.

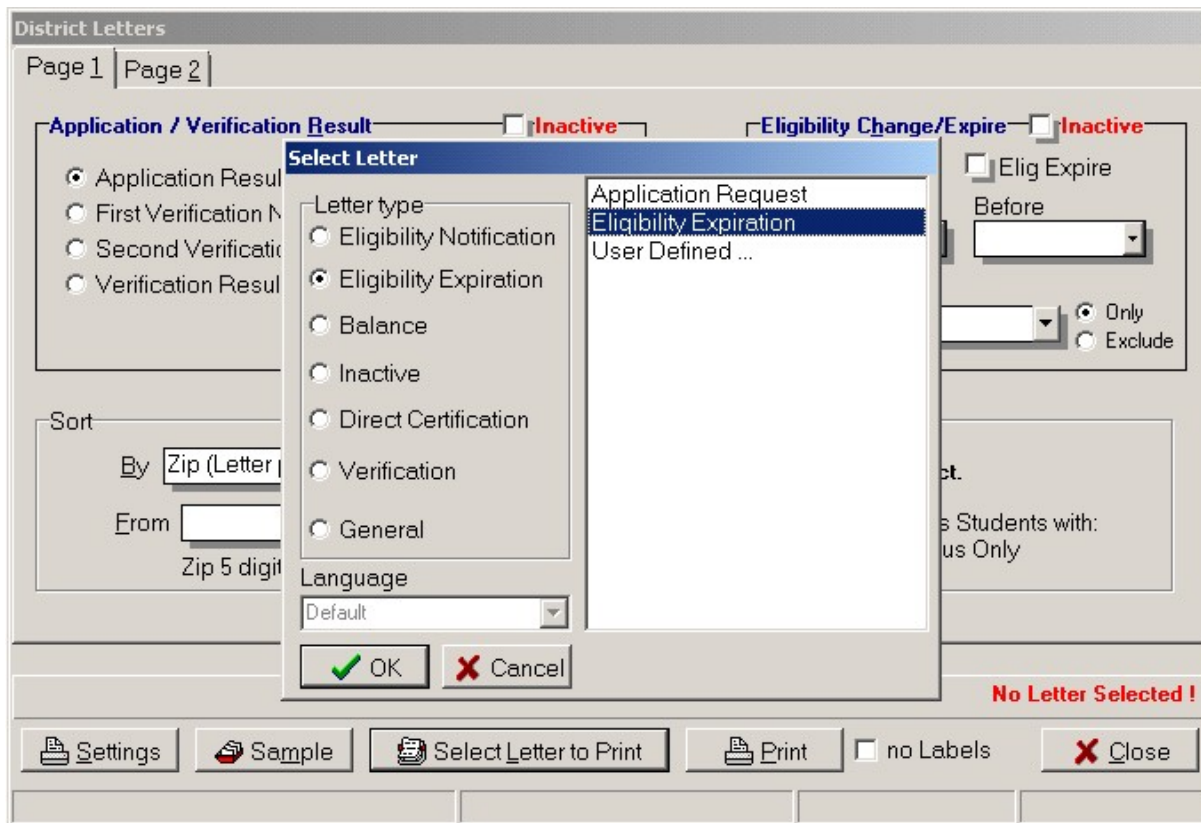
From the RIGHTrak Desktop

1. Click on the Letters Button



Letters

2. Click on Print Letters
3. Click on Select Letter to Print
4. Click on the Eligibility Expiration Radio Button
5. Highlight Eligibility Expiration



6. Click OK

Select the appropriate print criteria based on your letter. In this example we are printing letters for households that will have their temporary eligibility expire on October 1, 20XX.

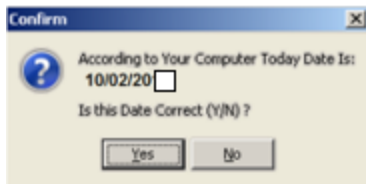
- A. Click on the check box for **Eligibility Change/Expire** to make it **Active**
- B. Click on the **Elig Expire** check box to make it active
- C. Enter the date in **Before** box that corresponds to **YOUR** expiration date. Our expiration date in our example is October 1, 20XX, so we enter 10/2/20XX since October 1st is BEFORE 10/2/20XX
- D. Select **Bulk Change** from the **Elig. Reason** drop-down menu. This ensures that we will only print letters for households that are due to expire because of the 30 day carryover provision.

The screenshot shows the 'District Letters' application window. At the top, there are tabs for 'Page 1' and 'Page 2'. The main area is divided into several sections. On the left, under 'Application / Verification Result', there are radio buttons for 'Application Result', 'First Verification Notice', 'Second Verification Notice', and 'Verification Result'. To the right of these are 'Reprint' and 'Printed After' (4/1/20XX) and 'Printed Before' (empty) fields. In the center, there are 'And' and 'Or' radio buttons. On the right, under 'Eligibility Change/Expire', there is a checkbox for 'Active' (checked) and a sub-section with 'Elig Change' (unchecked) and 'Elig Expire' (checked). Below 'Elig Expire' are 'After' (empty) and 'Before' (10/2/20XX) date fields. Further down is an 'Elig. Reason' dropdown menu set to 'Bulk Change' and radio buttons for 'Only' (checked) and 'Exclude'. Below this is a 'Status' section with a checked 'Active Acct.' checkbox and a 'Letter Includes Students with:' section containing a checked 'Active Status Only' checkbox. At the bottom left, there is a 'Sort' section with a 'By' dropdown set to 'House# (Letter per Family)' and 'From' (0) and 'To' (T999999) fields. At the bottom right, there is a 'Print' button and a 'no Labels' checkbox. At the very bottom, there is a 'Complete' button, a 'Letter #: 0' field, an 'Err: 0' field, and a 'Close' button. Red callout boxes labeled A through G point to specific elements: A points to the 'Active' checkbox, B points to the 'Elig Expire' checkbox, C points to the 'Before' date field, D points to the 'Bulk Change' dropdown, E points to the 'House# (Letter per Family)' dropdown, F points to the 'Settings' button, and G points to the 'Print' button.

- E. Set your Sort option
- F. Select or modify your printer under settings
- G. Click on Print

□ Step completed

Step 16. Recalculate Eligibility



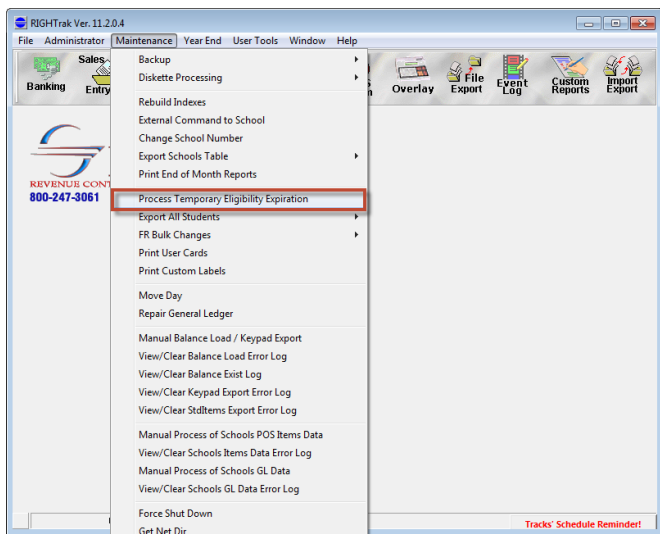
For Districts that are using Automatic Eligibility Expiration, the prompt to expire will automatically appear upon entering RIGHTrak for the first time on the date specified (the date on the left side is just an EXAMPLE date)

This step expires all of the carryover temporary eligibilities from the previous school year.

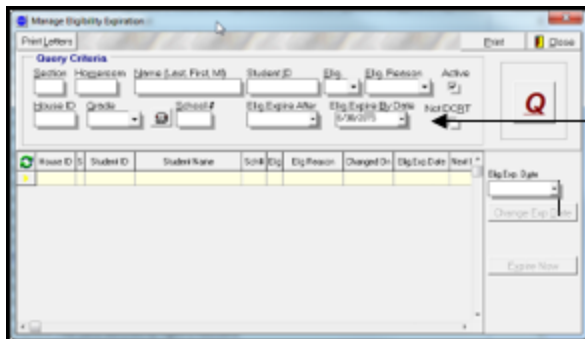
For Districts using **Manual Expiration** follow these steps:

From the RIGHTrak Desktop

1. Click on Maintenance
2. Click on Process Temporary Eligibility Expiration



The Temporary Eligibility Expiration screen will appear. All Temporary Eligibilities will be displayed. You must change the Elig. Expire by Date so that you only expire the Households that have not reapplied for Free and Reduced Status.



Change the date to match the District's End Grace Period Date. For example 09/30/20

The Dates shown here are just examples

1. Change the Elig. Expiration By Date
2. Click the Big Q

At this point all Households with the Grace Period Expiration Date should be on Screen.

3. Click on the First Student in the list so they become highlighted
4. Scroll to the bottom of the list or Hold the Ctrl Key down and press the End Key on the keyboard
5. Hold down the Shift Key and click on the last Student in the List this will highlight all students in the list at one time.

6. Click on Expire Now
7. Click on Close

The function Recalculate Eligibility can be used any time there is a need to recalculate the system wide eligibilities.

You may require a recalculation of eligibilities due to the following reasons:

- Change in the Government Income Table.
- Last day of grace period.
- Maintenance.

All Free and Reduced eligibilities' rolled over from the previous year will become N's (No Application). You should now print Eligibility Letters to all who were disqualified due to the eligibility recalculation.

□ Step completed

If you have any additional questions, please contact PCS Technical Support at (800) 247-3061.

Notes

This is a school level step

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

RIGHTRAK YEAR START

Fastrak Year Start

www.pcsRCS.com



PCS Corporate Headquarters in Englewood Cliffs, NJ

PCS REVENUE CONTROL SYSTEMS, INC.