RIGHTNOW
Year End Procedure

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Overview

Prior to performing <u>RightNow Year End</u>, the following tasks MUST be completed.
You can also use this checklist to keep track of your progress

1. **Provide the following information (marked ***) to PCS Support by e-mailing**
support@pcsrcs.com.

> ❑ *****Notify PCS of your intended date to perform RightNOW Year End**
>   **This is important in case your Year End was not done correctly!**
> ❑ ***** Bulk Grace Date*:_____/_____/_____**

>   *If you are unsure of your bulk grace date, it is defined as the last date of the grace period
>   for the students' eligibility statuses.
>   This will keep the student's eligibility 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).

2. **Ensure the following have been performed:**

> ❑ Last school serving day completed
> ❑ Month end reporting completed
> ❑ Financial reporting completed
> ❑ Claims completed

3. **School Year End**

> ❑ FASTrak Year Ends completed (if applicable*)
> ***WebPOS customers will not have to wait for schools to finish their year**
> **end processes - all year end processes are handled in RIGHTNOW.**

4. **Confirmation of Backups**

> ❑ PCS or local IT Support has notified of backup completed and archive process
> *Your IT Dept may deicde to perform this process in certain instances.
> *If you are a Self Hosted district you or your local IT will need to create your own
> backup.

While performing the year end procedures, make sure that you are the only user logged in with the Year End user.
The RightNow Year End procedures require there are no other users logged into RIGHTNOW.

Edit the Year End User

* Instructions as provided must be followed in order to access areas where year end functions can be performed.

If you have already created a Year End User from previous year use that same user, there is no need to create a new user
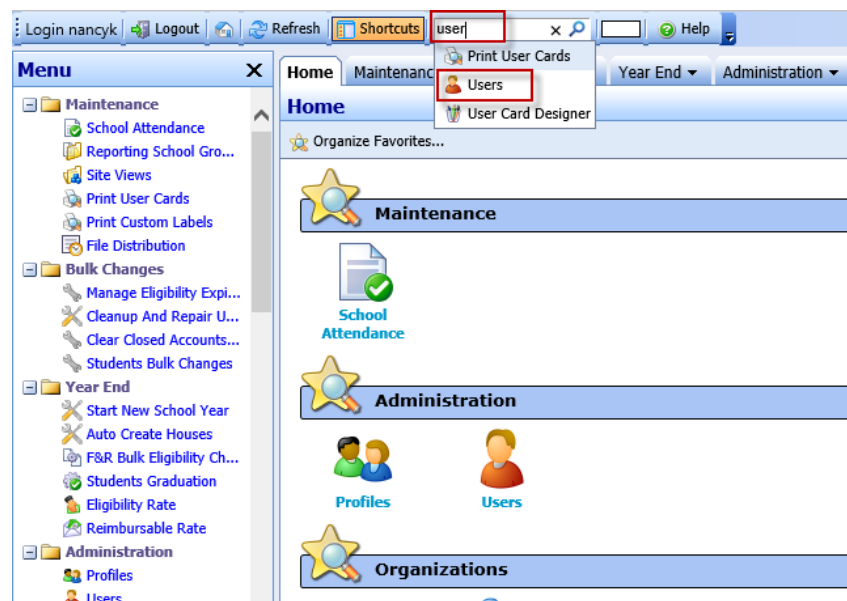
Search for Existing Year End User

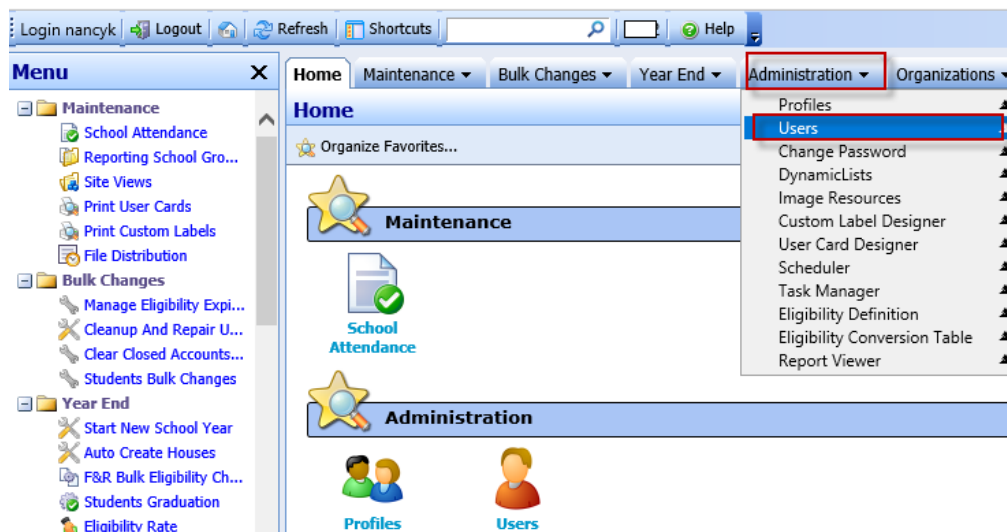**1.**   Access RIGHTNOW with your Username and Password.
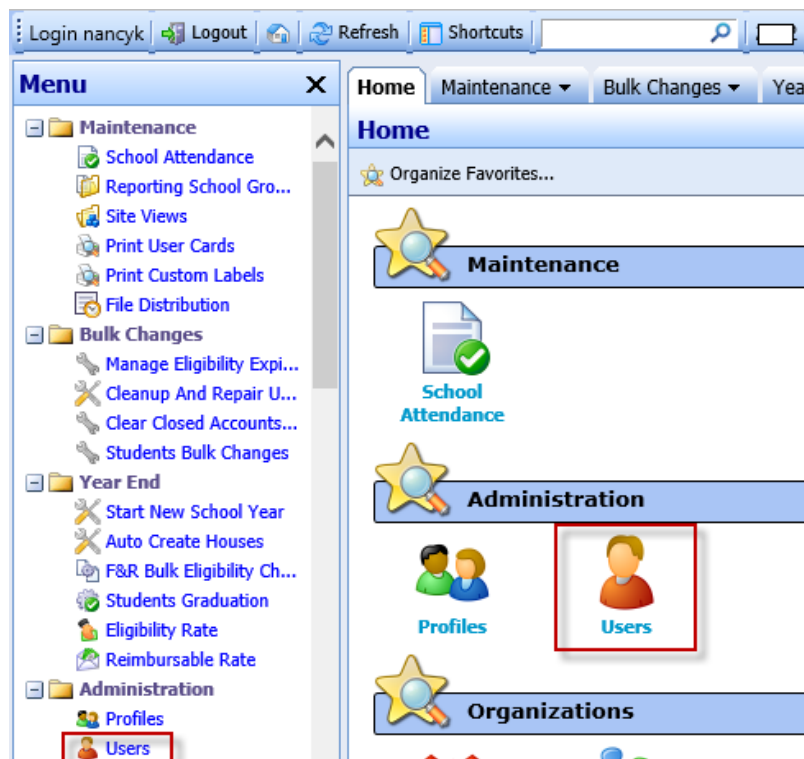

2.   **Navigate to Users by:**

        a.)   Using the shortcut option and typing in User

b.) Clicking on the Administration Tab and choosing Users

c.) Clicking on the main screen if your RIGHTNow is set up to show this way

3. Search the list of users for a YearEnd user (NOTE: Hopefully the name will show something to do with year end)

Edit or Create the Year End User

Click on the user name to highlight it and click on Edit

Password can be changed if needed (It needs to be changed if you are unaware of what it is)**

Create the Year End User ** Only needed if you did not already have a Year End user per the steps above)

* Instructions as provided must be followed in order to access areas where year end functions can be performed.

1.   Access **RIGHTNow** with your Username and Password. To create users, you may need to use a **RightNow Administrator** account.

2.   Access the Users module under Administration. *
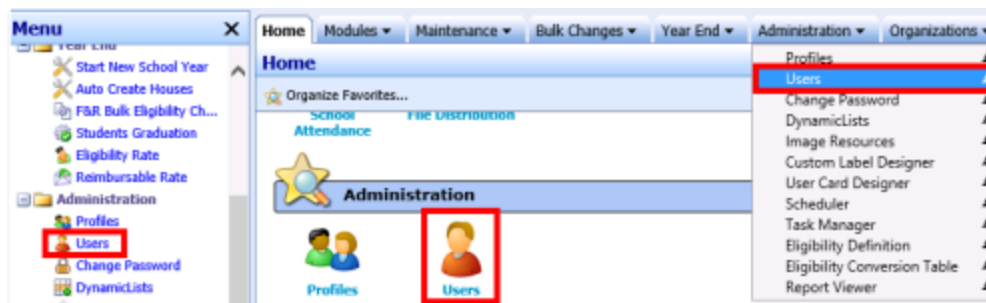
    * If your **RIGHTNow** user access is restricted - you may not see this module.

3.   Press the **New** button in **User Administration**.

The New User window will appear. You will need to enter all mandatory fields in order to create a new user.

Mandatory fields are marked with a red asterisk*.

4.　Select a Profile - **PCS Year End** as **Allow** and **Default**
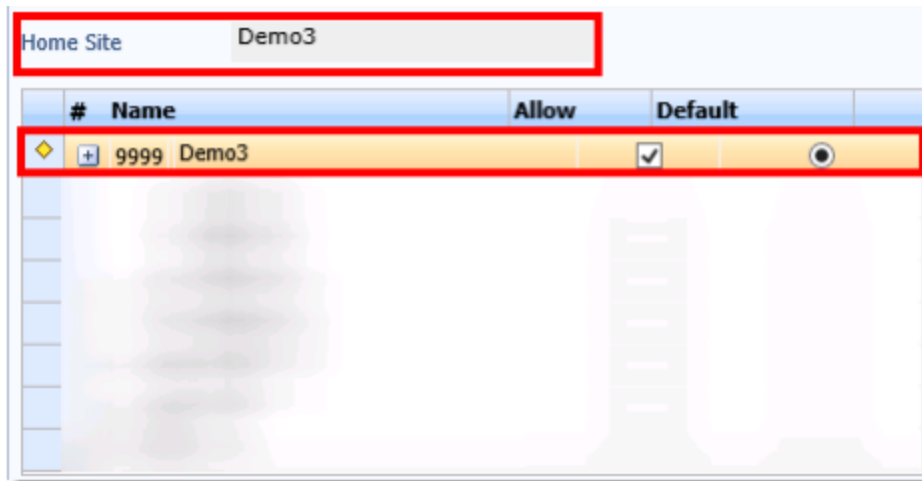
5.　Press **Next**.

The next page, the **Linked School** page, allows you to select your district associated to the profile.

6. Select the district as **Allowed** and **Default**.

7. Click on **Save**.

When you are finished creating the user, logout of RIGHTNow and login again with the user you just created. Make sure to
note the password you created if you are not performing Year End immediately. If you have any issues, please contact PCS Support.

Web UI vs. RTUI using a Year End Account

In the RIGHTNOW Year End, you will be switching between the Web UI and the RTUI. Pay attention to the steps and which application is needed. They are marked with which application you should be using when performing the step.

- **To perform your Year End procedure, you will need to use a machine which has access to both the Web UI and RTUI.**

- **You will also need to use a Year End User account to access the year end functions in the Web UI and the RTUI.**

If you do not know your Year End account password, please contact PCS Support.

If you are having issues determining which application to use, use the next pages as a reference of what each application looks like.

Web UI Login

Web UI

The Web UI is the main application that RIGHTNOW users are in on a day-to-day basis. It is accessed through Internet Explorer. Refer to the picture below to see the main page of the Web UI:
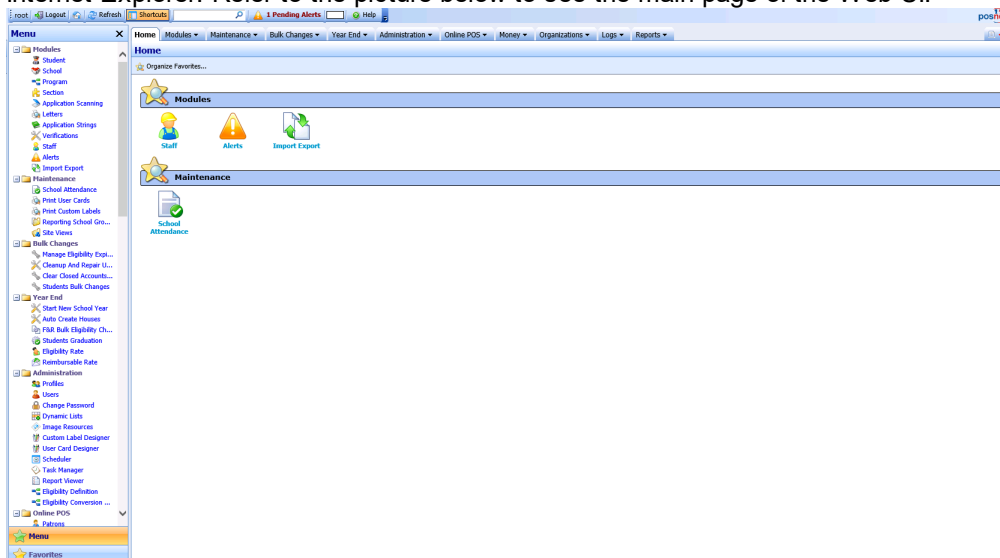
RTUI Login
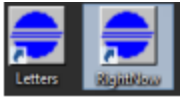
--Yours may look like these to the left.
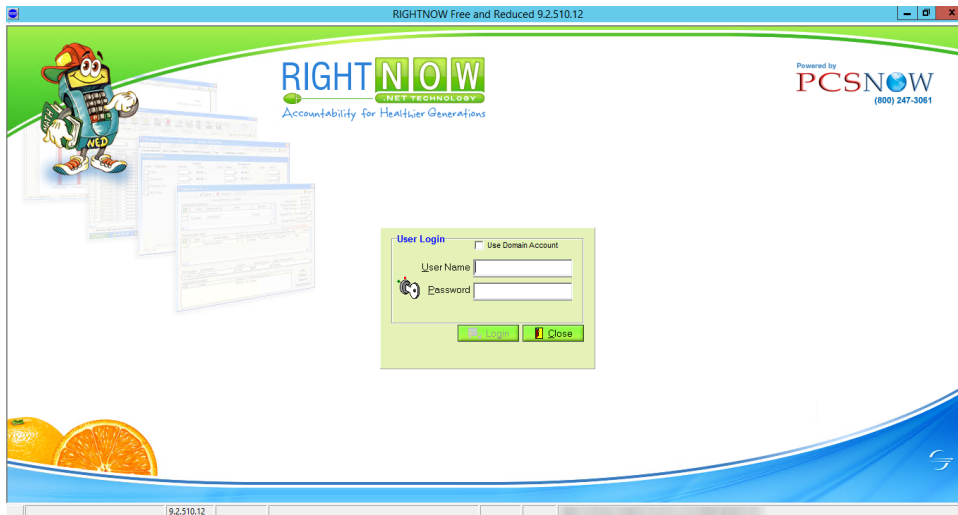
RTUI (Letters)

The RTUI is the application in RIGHTNOW that is mainly used for letters but is also used for Year End processes. The RTUI is usually installed on certain computers or the server. Refer to the picture below to see the main page of the RTUI:
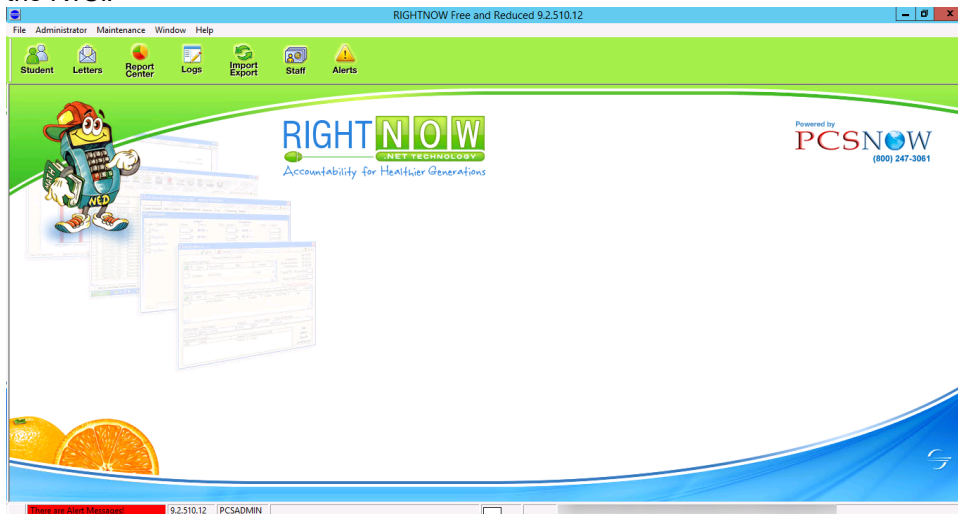
If you are missing/having issues logging into RTUI or Web UI with the specified login, please call PCS Support at 1(800)-247-3061.

Step 1: Verify Data (Web UI)

1. Access the the **Reports** on the **RIGHTNOW Web UI**.

2. Find the **GL Data Status Report**.

Change the date for previous months if necessary.
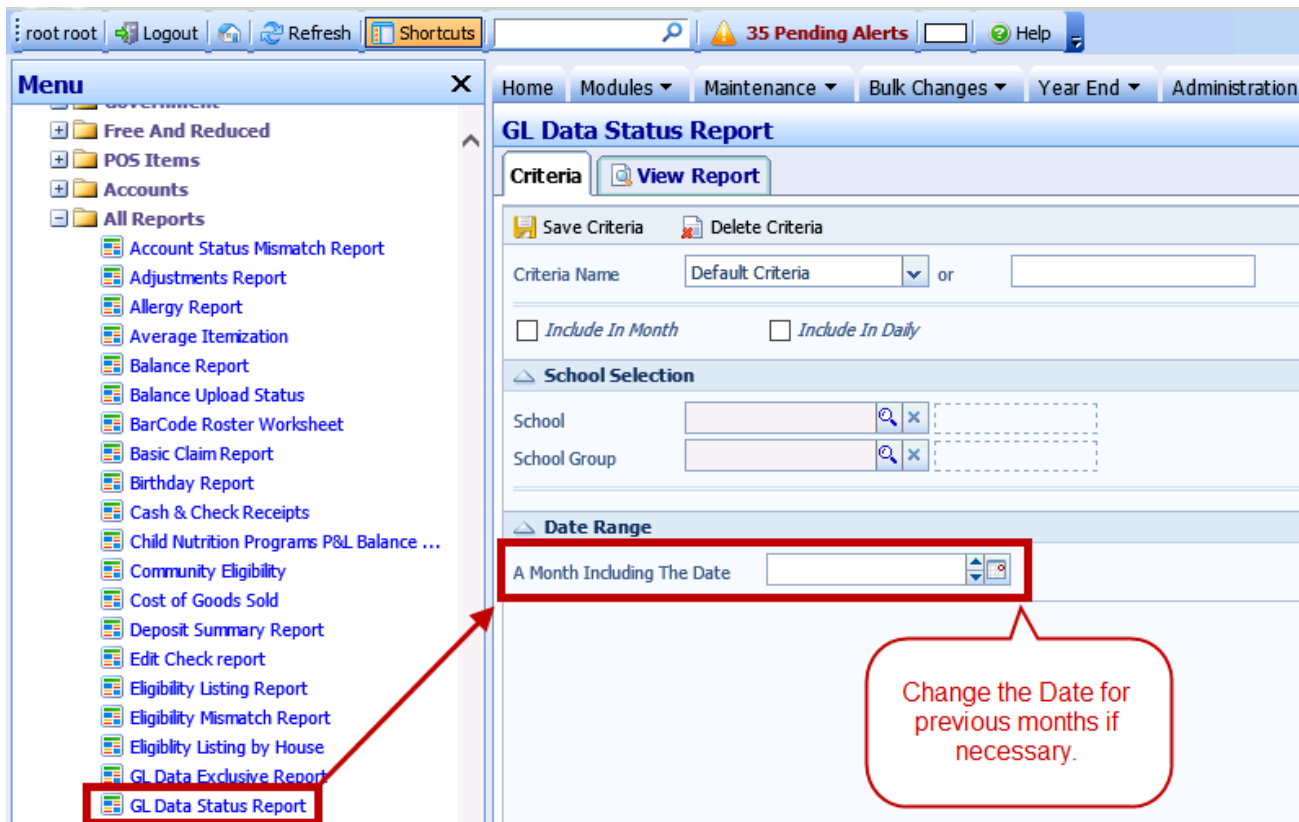
3. Press **View Report**. Verify that all schools have communicated with the district for their last serving day.

You may close the web UI after verifying the data.

Step 2: Make a Backup

Before proceeding, a backup of the data needs to be created. You must inform PCS Support about the date you intend to perform RIGHTNow Year End.
PCS (or your local IT in some cases) will perform your backup the night before the date requested.

FASTrak Year End(s) MUST be done before the backups are created.

If you are a self hosted district you or your local IT will need to create your own backup.

Step 3: Resume Scheduled Tasks At Year Start (RTUI)

This task is done to prevent any unintended changes to student records while school is not in session.
This will turn off and reassign the date your Enrollment and DCRT scheduled tasks will resume for the new year.

It is important to assign the correct dates and times when changing your scheduled tasks and to also notate this below for your records.

Generally, the scheduled tasks should be reassigned with dates after July 1 of the current year. YOU MUST get in contact
your local enrollment database administrator to find out the correct rollover dates for student enrollment and DCRT.

Use this page to write down the date you have made the change to the scheduled tasks, which scheduled tasks have been modified and the dates assigned to
restart them.
Make a copy of this page for your own reference.

<u>Note that once you reassign the START date the scheduled task will not resume until the new date assigned.</u>

Date Scheduled Tasks were changed: _____

Scheduled Tasks and Dates changed:

|	**From**	**To**
(Example) _prod_demo_enrollment_import	8/1/20☐ 7:00 AM	8/1/20☐ 7:00 AM

_____

_____

_____

Use this page to write down the date you have made the change to the scheduled tasks, which scheduled tasks have been modified and the dates assigned to
restart them.
Make a copy of this page for your own reference.

Instructions are provided on the following pages.

Step 3a: How to Reassign Scheduled Task Dates (RTUI)

1. In the RTUI, go to **Administrator**, and then select **Scheduler.**
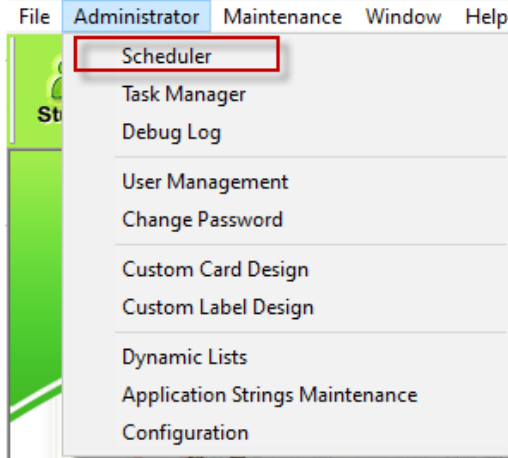
2. Find the 3 jobs that are marked **DCRT USDA, Enrollment Import** and **DCRT Import/Match**. You can use the screenshot below as an example.

3. Select the job by **clicking** on it and pressing **Edit.**

4. <mark>This is the most important step</mark>.

> In order:
> Select the Down Arrow next to the date for "Start Date/Time"
> Select the right arrow to select the month >
> Select the day in month--this will take you back to the main screen for the task

- Notate the updated Start date/time and include on the main page of Step 3 in the <u>To column</u>
   - Press "OK" when finished.

   Note that once you have changed to a date in the future the task will not resume until the date desired.

5. Repeat steps 2-4 as necessary.

Step 4: Bulk Updating Eligibilities (RTUI)

The Bulk Grace Date Eligibility 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 RIGHTNOW.
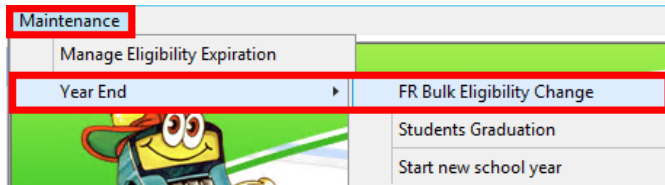
This step is done within the Letters (RTUI) Module. If you do not have the Letters module installed OR are having issues logging into RTUI, please contact PCS Support.

District Grace Date: _____ / _____ / _____

Step 4a: FR Bulk Eligibility Change (RTUI)

From the **RTUI:**

1. Click **Maintenance > Year End > FR Bulk Eligibility Change**.

2. Modify the screen to reflect the example below. You may wish to select additional settings based on your particular needs.
Current Fiscal Year: 20XX

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. Press **Start** to begin the process. This process can take several minutes. Do not try to stop it. When the bulk process is over, press **Close**.

NOTE: You may optionally desire to confirm whether the rollover was successful by navigating to the Students button (WEB UI) and looking up a
Free and Reduced student noting the assigned expiration date or follow Step 11 in this document. If there is any issue contact PCS Support.

Step 5: Print a Balance Report (Reccomended)

This will provide you with a snapshot of your student balances at the end of the current school year.

Choose the options to generate the report most suitable for your district.

However, the most typical queries are:

Active (all students)

Closed (all students)

Closed (Balance below zero)

Choose Sections to exclude (ex. FAC, EMP) – leave Incl. Sections box unchecked.

Once the report is generated, it is highly recommended to save using CSV and/or PDF. Click the Export button and save to a location easy to find.

If there are any issues generating this report please contact PCS Support

Step 6: Update Federal Reimbursement Rates (Web UI)

To update the **Federal Reimbursement Rates**, you must access the **Web UI** of RIGHTNOW.

1. Access the **RIGHTNOW Web UI**.
2. Go to the **Year End Module** and press **Reimbursable Rate**.*

*If you are having issues finding **Reimbursable Rate,** use the search bar at the top of the Web UI. Search for "Reimbursable Rate".
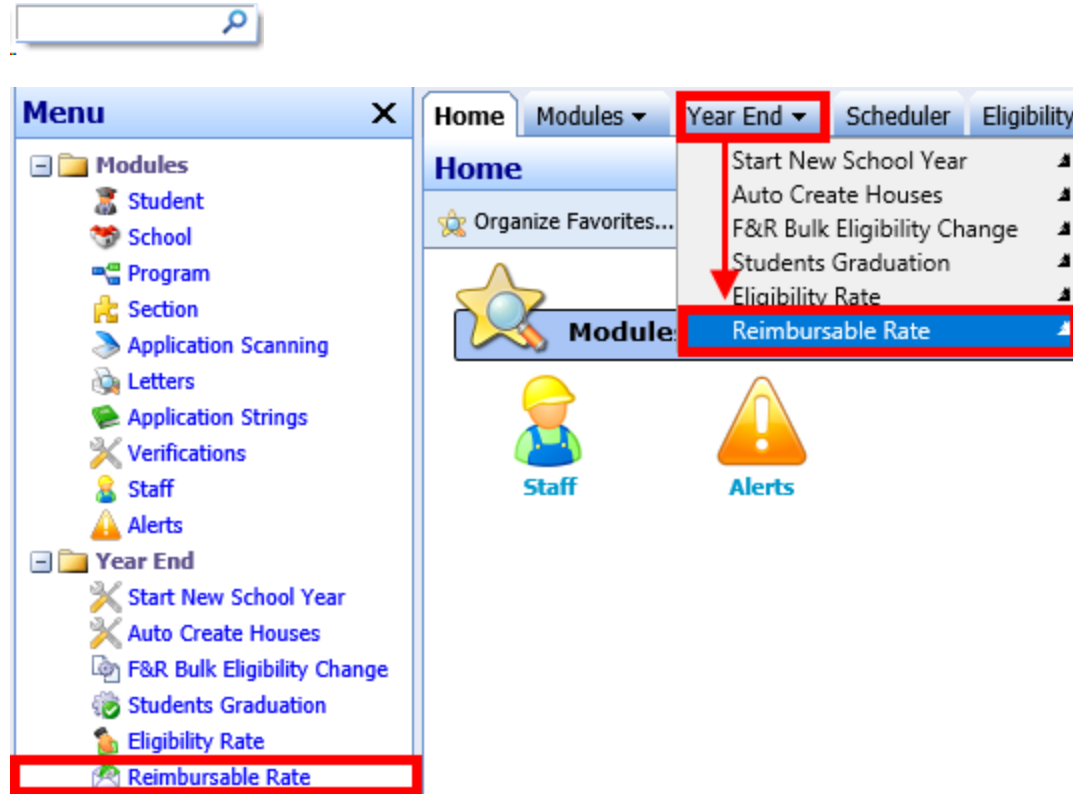
3. **Edit the values for the Reimbursement Rates by double clicking on the reimbursable rate and typing the value. Repeat for each Food Session.**

| Food Session	Meal Status	*Federal	*State	*Federal Severe Needed	*Federal State Needed
Breakfast	Free	0.0000	1.0000	1.8900	0.0000

4. Press **Save. Be sure to check the reimbursement rates again after saving to make sure changes have applied.**
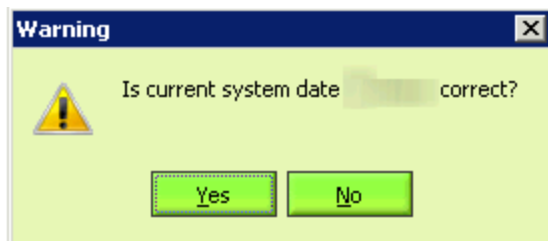

Save

Step 7: Start New School Year (RTUI)

This step will begin the new school year and close the history for the previous school year.

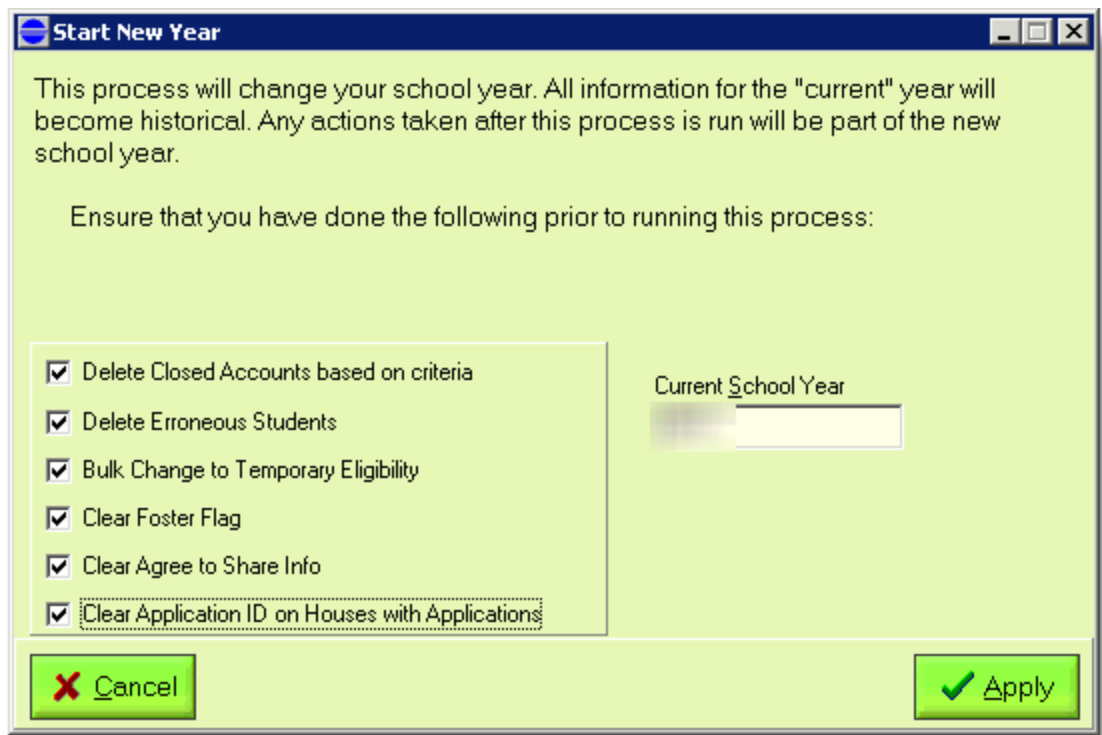1. In the **RTUI**, go to **Maintenance > Year End > Start New School Year**.
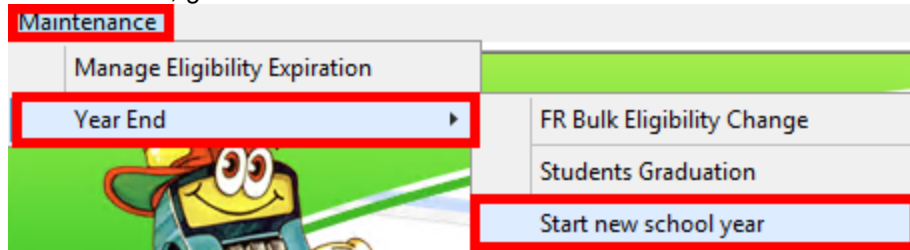
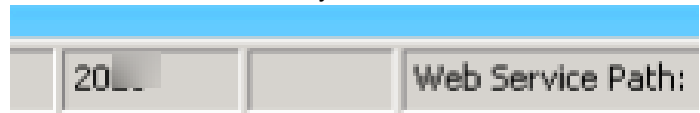2. You will be informed of the current date. Press **Yes**.

3. Make sure that all processes are checked off and the **Current School Year** is correct. Press **Apply** once you have confirmed all settings.

Please Note: The current school year reflects the school year **YOU ARE CURRENTLY IN**. For example, If you want to close the 2023-2024 school year and start the 2024-2025 school year, you would enter in the current school year **2024**.

After pressing **Apply**, you have successfully finished the **Year End** process for **RIGHTNOW**.

You can check the current year at the bottom of the RTUI, as shown here:

For the upcoming year (Next Year) 2024-2025, the year on the bottom should state 2025 (Next Year).

Step 8: Edit Eligibility Definitions (Web UI)

If available, edit the Eligibility Definitions for the new school year. This can be found in the **Administration** under **Eligibility Definition**.*

*If you are having issues finding the **Eligibility Definition**, use the search bar at the top of the Web UI. Search for "Eligibility Definition".
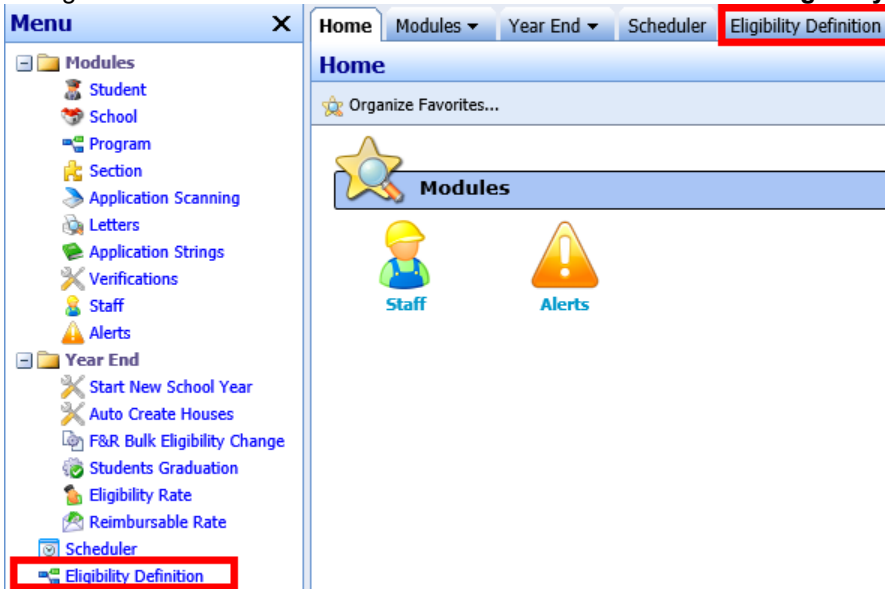
Eligibility Definition

Edit   View   Export CSV

Code	Name	Breakfast Price	Lunch Price	Snack Price	Supper Price
1	Free	0.00	0.00	0.00	0.00
2	-2-	1000.00	1000.00	0.00	0.00
3	-3-	1000.00	1000.00	0.00	0.00
4	-4-	1000.00	1000.00	0.00	0.00
5	-5-	1000.00	1000.00	0.00	0.00
6	-6-	1000.00	1000.00	0.00	0.00
7	-7-	1000.00	1000.00	0.00	0.00
8	-8-	1000.00	1000.00	0.00	0.00
9	-9-	1000.00	1000.00	0.00	0.00
10	ANY PAID SEC	1.25	2.30	0.00	0.00
11	ANY PAID ELEM	1.25	2.05	0.00	1.00
12	Ven Alt. Free	0.00	0.00	0.00	0.00
13	Ven Alt. Reduced	0.30	0.40	0.00	0.00
14	Ven Alt. Paid	1.25	2.30	0.00	0.00
15	ALT 2 FREE	0.00	0.00	0.00	0.00
16	ALT 2 REDUCED	0.30	0.40	0.00	0.00
17	ALT 2 PAID	1.25	2.30	0.00	0.00
18	Adult Labor	1000.00	0.00	0.00	0.00
19	Snack Program	1000.00	1000.00	0.00	0.00
20	Paid Cash Elem	1.25	2.05	0.00	0.00
21	Paid cash Sec	1.25	2.30	0.00	0.00
22	Adults	1000.00	3.00	0.00	0.00
23	Special Programs	1000.00	1000.00	0.00	0.00

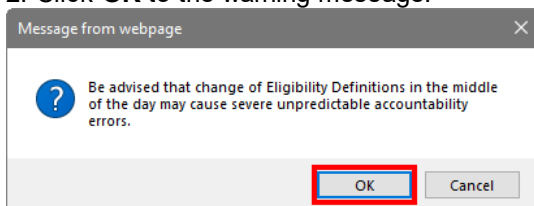# Step 8a: How to Edit and Save Eligibilities (Web UI)

If the prices for reimbursable meals have changed for the upcoming school year, you will need to edit the eligibilities in the **Eligibility Definition** in the Web UI.
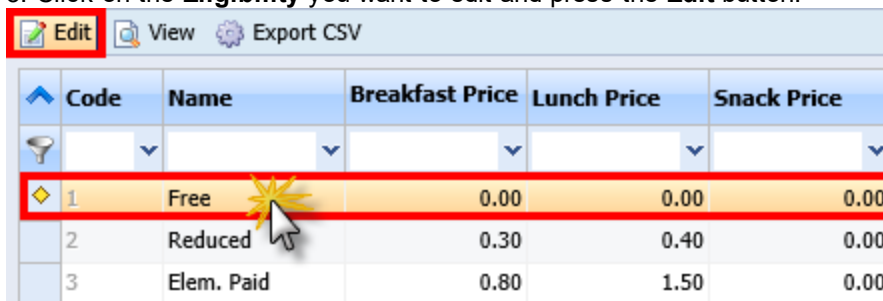
To edit the eligibilities:

1. Log on to the Web UI of RIGHTNOW. Go to **Administration -> Eligibility Definition**.

2. Click **OK** to the warning message.

3. Click on the **Eligibility** you want to edit and press the **Edit** button.

4. Edit the **Eligibility** as necessary. Eligibility pricing for reimbursable meals is at the top under **Price Information**. The **Claimable As** information is at the bottom, as highlighted. Press **Save** when finished.

5. Repeat steps 1-4 as necessary. Edit any pricing information as needed.

6. Press **Export CSV** and then select the schools as necessary to send down the **Eligibility Definitions**. Press **Save** to send it down to the schools. The next time the school communicates, it will receive the **Eligibility Definition** changes.

This step is not needed if your district uses WebPOS.

Export CSV
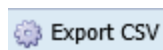
If your district has different eligibilities by School Level, please contact PCS Support for assistance on how to set up your Eligibility Definition.

Step 9: Edit School Attendance (Web UI)

If available, edit attendance and enrollment for the new school year. School attendance can be edited under the **School** module.*

*If you are having issues finding the **School** module, use the search bar at the top of the Web UI. Search for "School".
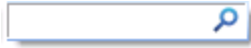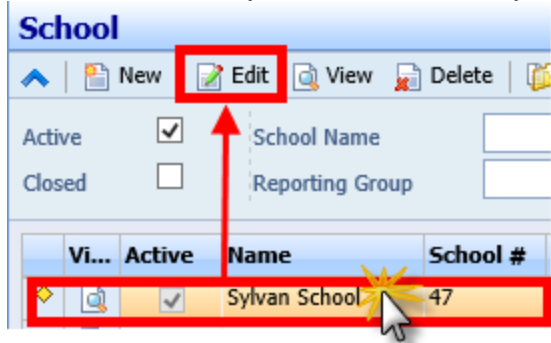
To edit school attendance:

1. Enter the **School** module.
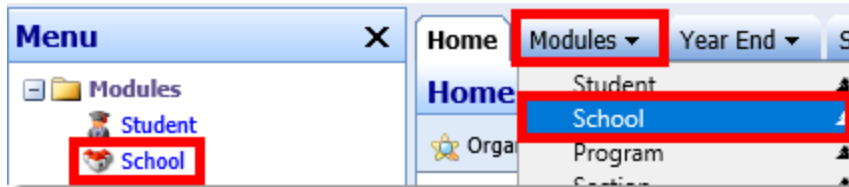
2. Select the school you would like to edit by **clicking** on the school. Press **Edit**.

Edit School Attendance (Web UI)

3. Click on the **Government** tab when editing the school. From here, edit the **Attend. Factor** as necessary. Double-check to make your government meal claim type is also correctly checked off. When finished, press **Save**.
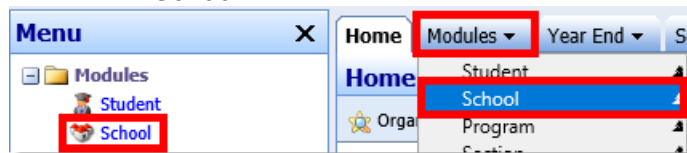
Step 10: Edit School Provisions/CEP Percentages (Web UI)

If available, edit provisions and CEP percentages for the new school year. School attendance can be edited under the **School** module.*

*If you are having issues finding the **School** module, use the search bar at the top of the Web UI. Search for "School".
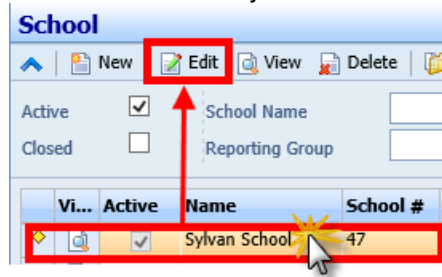
To edit school provisions:

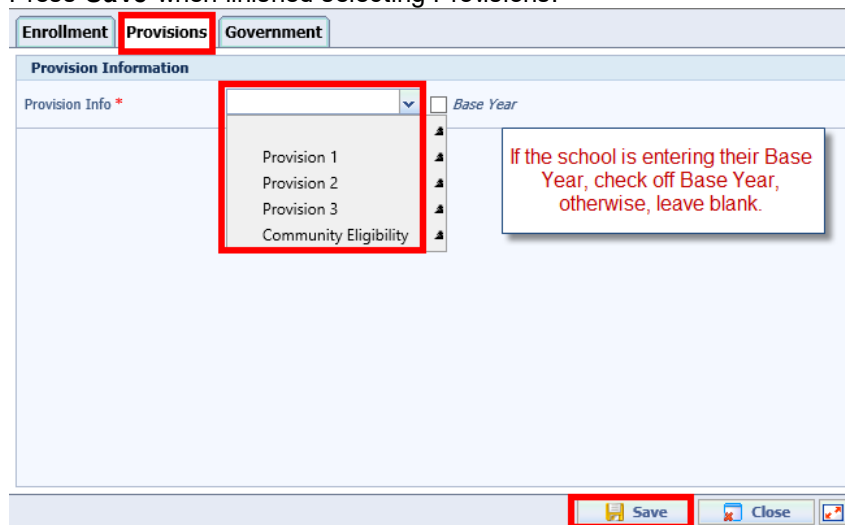1. Enter the **School** module.

2. Select the school you would like to edit by **clicking** on the school. Press **Edit**.

3. Select the **Provisions** tab and select the **Provision Info**. Take note if the school is entering or exiting the Provision **base year**.
Press **Save** when finished selecting Provisions.

Step 10a: Edit CEP Percentages (Web UI)*
*Note: This step is optional.

If you are editing CEP Provision schools - you may also need to edit percentages for the new year. The CEP percentages are edited in the **School** module.

To Edit CEP Percentages:

1. Select the CEP school and press the **CEP** button in the **School** module.

2. Enter the **Free** and **Paid** percentages for each month. Press **Save** when finished.

Enter free and paid percentages for each month.

## Step 11: Manage and Check Eligibility Expiration (RTUI)

Make sure that eligibility expiration has successfully completed through checking the eligibility expiration.
It is recommended to do this step. If your eligibilities expire on an incorrect date, there is NO way to reverse it!

You can check the eligibility expiration dates in the **RTUI**.

To check eligibility expiration:

1. In the RTUI, click on **Maintenance -> Manage Eligibility Expiration**.
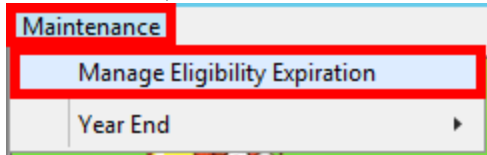
2. In the **Eligibility Expiration** window, copy the settings as seen in the image below and press **Search**:
- Active accounts only
- DCRT/Non-DCRT
- Elig. Reason: Bulk
- Elig Expire on or Before with your bulk grace date

3. Make sure the eligibilities are expiring on the correct date - **If you do not see any eligibilities expiring, please check to see if your FR Bulk Eligibility Change was done correctly (Step 5).**

Please contact PCS Support immediately if you are having issues with your Eligibility Expiration.

www.**pcsRCS**.com

PCS Corporate Headquarters in Englewood Cliffs, NJ

PCS REVENUE CONTROL SYSTEMS, INC.