

# End of School Year Process (Food Service)

Last Modified on 10/22/2022 9:49 am CDT

[Inactivate Graduated Student Accounts | Remove Student PINs | Inactivate Graduated Student Accounts and Remove Student PINs | Adjust Inactive Student Account Balances | Run the Adjustment Report | Send Letters to Households | Terminal Maintenance | Deactivating Terminals](#)

This article provides some step-by-step recommendations and best practice instructions for Food Service end of school year processes. This includes student account and PIN processes, mailing letters to households concerning student balances, and terminal maintenance.

Please note that the following processes may not align with your district's end of year processes.

## Inactivate Graduated Student Accounts

**PATH:** *Point of Sale > Account Maintenance > Account Management Wizard*

Students must be marked as inactive after they have graduated from school. The student's PIN numbers can be removed and returned to Campus for future use by other students. The **Mode** options under the **Account Management Wizard** provide options for users to manage student account information and balances.

1. Select **Inactive accounts** from the **Mode** dropdown.
2. Choose the **Student** option as the **Type**.
3. Optional: select an **Ad Hoc Filter**.
4. Scroll down the **Enrollment End Status** field and select **Graduated from High School**.
5. Select the appropriate grade (e.g., 12) from the **Grade** field.
6. Mark the **Use Ended Enrollments** box.
7. Select the current **School Year** that is ending.
8. Mark the **Include Patron Detail** box to view student names with the total numbers of graduated students.
9. Click the **Test** button to view the results of the report prior to making changes to the database. To finalize these changes, click on **Run Update**. The results appear in another window.

Mode: Inactive Accounts Editor

## Remove Student PINs

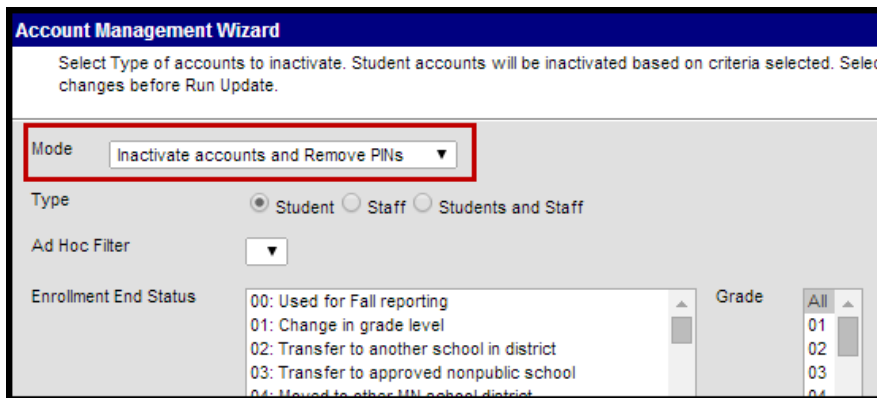
1. Select **Remove PINs** from the **Mode** dropdown.
2. Choose the **Student** option as the **Type**.
3. Select the **Ad Hoc Filter** from the dropdown options to narrow the number of students whose PINs will be removed.
4. Mark the **Include Patron Detail** box to view student names instead of just total numbers of graduated students.
5. Click the **Test** button to view the results of the report prior to making changes to the database. To finalize these changes, click on **Run Update**. The results appear in another window.

Mode: Remove Pins Editor

## Inactivate Graduated Student Accounts

## and Remove Student PINs

You can also mark graduating student accounts as inactive and remove their PINs from the system at once by selecting **Inactive accounts and Remove PINs** from the **Mode** dropdown and completing the report editor. With this option, an **Ad Hoc Filter** is not necessary to remove PINs - the student's PINs that are removed are those with the selected **Enrollment End Status**. For end of year purposes, this is due to graduation. This option is used most often by districts.



*Mode: Inactive Accounts and Remove Pins Editor*

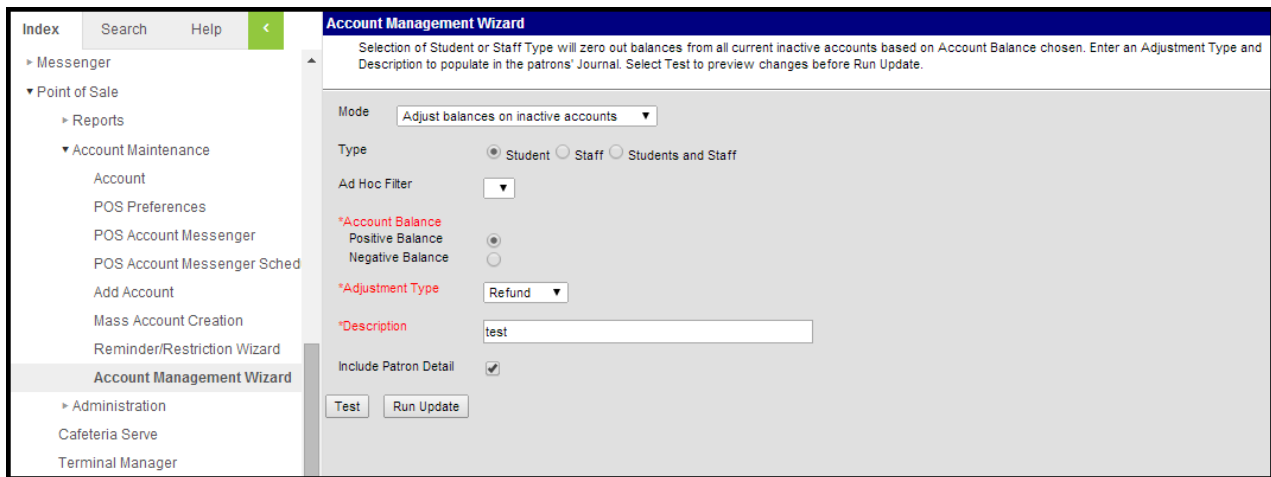
## Adjust Inactive Student Account Balances

Inactive student accounts with positive or negative balances at the end of the school year can be adjusted. This leaves a description of the adjustment on the student's Journal tab.

1. Select **Adjust balances on inactive accounts** option from the **Mode** dropdown.
2. Choose the **Student** option as the **Type**.
3. Select an **Ad Hoc Filter**. (Optional)
4. Mark either **Positive Balance** or **Negative Balance** as the *Account Balance* option.
5. Choose an **Adjustment Type**. Default options include: **Bad Debt**, **Refund**, and **Write-Off**.
6. Include a **Description** of the adjustment.

This description can be seen on the Portal by parents as well as on the student's Journal tab.

7. Mark the **Include Patron Detail** box to view student names instead of just total numbers.
8. Click the **Test** button to view the results of the report prior to making changes to the database. To finalize these changes, click on **Run Update**. The results appear in another window.



Mode: *Adjust Balances on Inactive Accounts Editor*

## Run the Adjustment Report

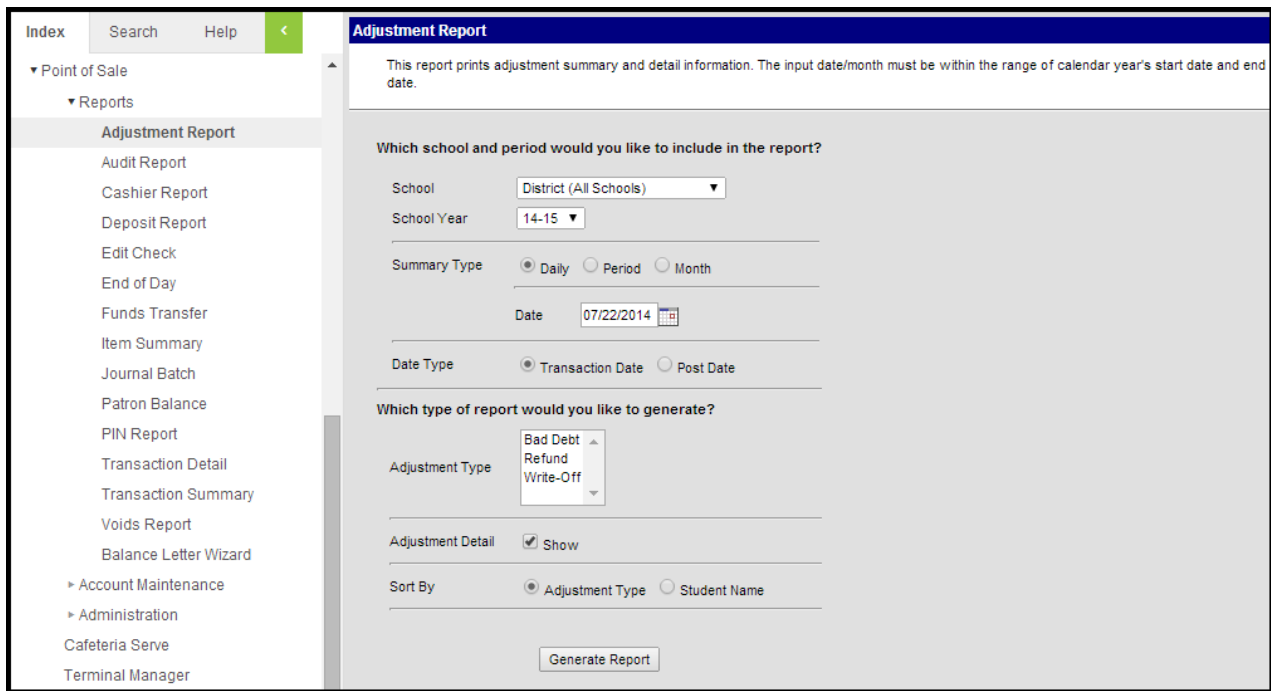
**PATH:** *Point of Sale > Reports*

After student accounts have been adjusted, districts can reference these changes by running an **Adjustment Report** to view these records.

1. Select an individual school or choose **District (All Schools)** from the **School** dropdown.
2. Select a **School Year**.
3. Select a **Summary Type**. Options include: **Daily**, **Period**, and **Month**.
4. Select a **Date Type**. Options include the **Transaction Date** or the **Post Date**.
5. Choose an **Adjustment Type** for the report. Default options include: **Bad Debt**, **Refund**, and **Write-Off**.

The **Date** options depend on the **Summary Type** selected. For any date, the input date must be within the range of calendar year's start date and end date. Input a day, start date and end date, or month in which to run the report.

6. Mark the **Adjustment Detail** box.
7. Select how you would like to sort the report from the **Sort by** options: **Adjustment Type** or **Student Name**.
8. Select **Generate Report**. The results appear in another window.



### Adjustment Report Editor

## Send Letters to Households

Districts can send out letters to households notifying them of the student's account current balance through the **Patron Balance** report. Districts can also send a letter with the use of the **Balance Letter Wizard** or through **POS Account Messenger**.

To send a letter to a household regarding an account's low balance through the **Patron Balance** report:

1. Select **Low Balance Letter** from the **Report Type** dropdown.
2. Choose a **Household Letter Print Option**. Select **Multiple Accounts per Letter** if there are multiple students with Food Service accounts residing in the same household or select **One Account per Letter**.
3. Mark the **Print Letters for Secondary Households** check box. (Optional)
4. Reports can be run for individual schools and for all schools in the district. Select a school or choose **District (All Schools)** from the **School** dropdown.
5. Select a **School Year**.
6. Select an **Ad Hoc Filter**. (Optional)
7. Input a **Maximum Balance** value. (Optional)
8. Select **Eligibility** options. Check box options include: **Paid**, **Reduced**, **Free**, and **Non-reimb & Adult**.
9. Select **Sort Options**. Options include: **Patron Name**, **Grade & Name**, and **Homeroom Teacher**.
10. Select an **Account Status**. Options include: **Active**, **Inactive**, and **All**.
11. Mark the **Include End Dated Patrons** check box. (Optional)
12. Select an existing template from the **Select a letter template** options or create a new template by selecting **New Letter** without selecting a template. Complete one of the following options:

| Option                          | Procedure  |
|---------------------------------|--|
| <b>Select a letter template</b> | <p>If a template is selected, click <b>Edit</b>. A template letter detail will appear.</p> <div style="background-color: #fff9c4; padding: 10px; border: 1px solid #ccc;"> <p>Anything in a white text box will print as it shows in the detail editor.</p> </div> |
| <b>New Letter</b>               | <p>If a template is not selected, click <b>New Letter</b> and create a new template.</p>   |

13. After the letter editor detail is modified to fit your specifications, click **Save, Copy, Print Sample**, or **Back** to further edit the letter options.

14. Select **Print Letter**.

For more details about Patron Balance information and reporting, see the [Patron Balance](#) page.

*Report Type: Low Balance Letter Editor*

Save Copy Print Sample Back

**Letter Detail**

\*Letter Name  \*Font Type

Allow Margin for Letter Head

**Letter Format**

Date:

Guardian Name(s)  
Address  
City, State, Zip

Dear Parent or Guardian,

The balance(s) for the following food service account(s) are:

Low Balance Letter Template Detail

Save Back

**Letter Detail**

\*Letter Name  \*Font Type

Allow Margin for Letter Head

Low Balance Letter Detail

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**Balance Letter Wizard**

This wizard will walk you through the creation of an account balance letter format. The students basic information, account balance and mailing address will be printed automatically.

**Balance Letter Templates**

Which students would you like to include in the report?

Grade

Ad Hoc Filter

Enrollment Effective Date

Summary Date\*

Sort Option  Name  Grade  Balance  Homeroom Teacher

Edit Delete

New Letter

Print Letter

Balance Letter Wizard

**POS Account Messenger**

POS Account Messenger sends Point of Sale account related messages to Messenger contacts for student and recipients, select an Ad Hoc filter.

The Template Name and User/Group can be changed after selecting Save or Copy.

User/Group:  Template:

Enter the filter criteria for POS Account Messenger:

| School                          | Grade      | Eligibility       |
|---------------------------------|------------|-------------------|
| All Schools                     | All Grades | All Eligibilities |
| 0000 Adams Elementary ALC       | 01         | Paid              |
| 988 Alternative Learning Center | 02         | Reduced           |
| 555 Appleby Middle              | 03         | Free              |
| 1 Arthur Elementary             | 04         | Non-Reimb & Adult |
| 019 Buchanan Middle School      | 05         |                   |
| 8 Carter Middle                 | 06         |                   |
| 176 Cleveland Elementary        | 07         |                   |
| 300 Clinton Secondary           | 08         |                   |
| 0197 Coolidge Elementary        | 09         |                   |

*CTRL-click or SHIFT-click to select multiple*

Balance:  All  Range  Use Account Reminder Setting

Account:  All  Active  Inactive

Ad Hoc Filter (Further narrows criteria):

Effective Date:  Limit delivery to contacts that speak:

Delivery Devices:  Inbox  Email  Voice  Text

Sender's Email:

Message Subject:

Message Body: Cutting and pasting from third party products, e.g., Microsoft Word, is not recommended.

**B I U** [List Icons] [Image Icons] [Font Size: 12] [Color: A]

Account Maintenance > POS Account Messenger

# Terminal Maintenance

**PATH:** Point of Sale > Administration > Terminals

The Events column of the **Terminals** editor of Point of Sales Administration should be at or very close to 0 (zero) for all terminals on or after the last day of serving.



**Terminals**

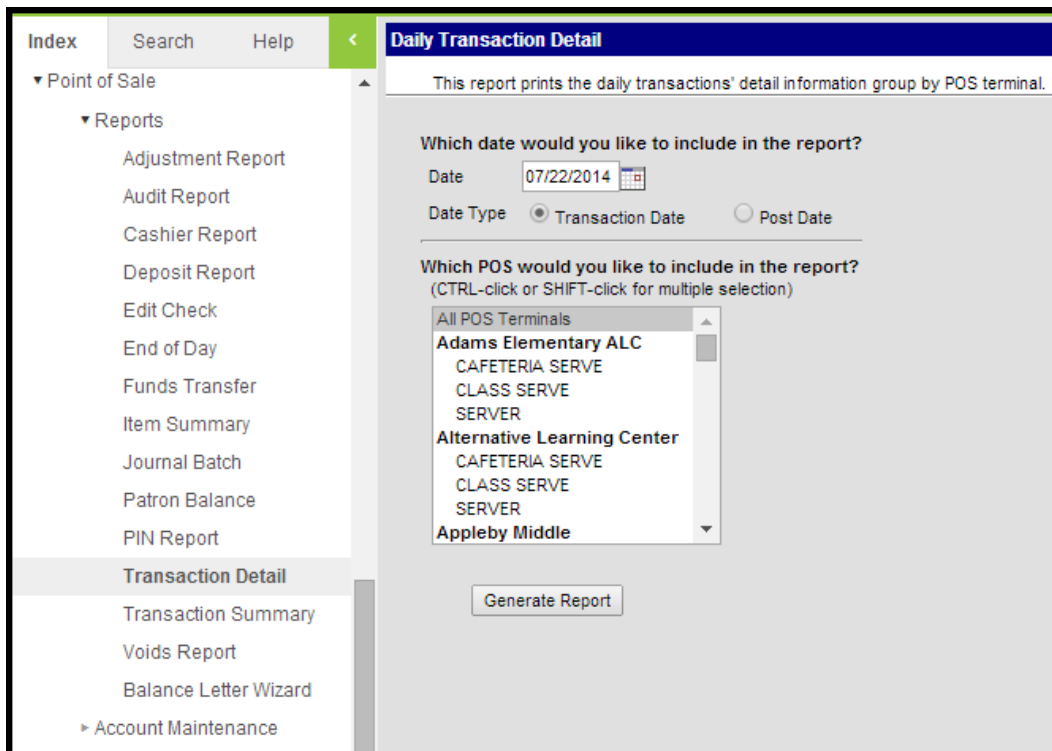
+ New 🖨️ Print All

| Name            | Last IP Address | Events | Responses |
|-----------------|-----------------|--------|-----------|
| AES-1           |                 | 36     | 0         |
| CAFETERIA SERVE |                 | 0      | 0         |
| CLASS SERVE     |                 | 0      | 0         |
| CS-1            |                 | 0      | 0         |
| HHS-1           |                 | 20950  | 0         |
| POS-1           | 10.35.58.14     | 20951  | 0         |
| SERVER          |                 | 0      | 0         |
| VBHS-1          |                 | 0      | 0         |

### Terminals

Best practices for verifying that the Event column is accurate for the Point of Sale terminals:

- It is recommended that cashiers write down the name of the last student that went through their lunch line on the last day of school.
- Generate a Daily Transaction Detail Report for the last day of school and check for the name of the student who went through the lunch lines last to verify the last transaction has posted successfully.



*Daily Transaction Detail Report*

## Deactivating Terminals

Once the last transaction has been verified to have posted successfully, the terminals that will not be used until the following school year can be inactivated.

This can be done by:

1. Going to **Point of Sale > Administration > Terminals**.
2. Select a Terminal; a **Terminal Detail** will appear for that terminal.
3. Unmark the **Active** check box.
4. Save.

When the next school year is about to begin, mark the terminal as Active once more and complete a POS Data Reload. For instructions on the POS Data Reload process, see the [Terminal Manager](#) page.

**Terminal Detail**

\*Name  Active

School

- Adams Elementary ALC
- Alternative Learning Center
- Appleby Middle
- Arthur Elementary
- Buchanan Middle School
- Carter Middle
- Cleveland Elementary
- Clinton Secondary
- Coolidge Elementary
- EC Screening School
- Eisenhower Elementary
- Elementary
- Fillmore Middle School
- Ford Middle

*Terminal Detail*

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