

## SuccessEd 2025-26 Rollover Instructions

### **SAVE THE DATES:**

**\*\*\*Friday, June 12<sup>th</sup>** – Connex linkage will be disabled\*\*\*

**\*\*\*Wednesday, July 8<sup>th</sup>** (may take up to 48 hours to complete) – District Student Data Rollover \*\*\*

The 2025-26 Rollover instructions provide steps for completing pre- and post-rollover tasks. Following these steps promotes data integrity and minimizes the need for manual correction of data following the rollover. Pre-rollover tasks can begin after reading the instructions in their entirety. After rollover, post-rollover tasks should be completed to verify accuracy of data and prepare for the 2026-27 school year.

If the district subscribes to the Connex product, some of the following steps should only be completed once the process has been turned OFF; otherwise, data (i.e., **Current Grade** and **Current Campus**) will be overwritten during the next download of demographics to SuccessEd. Connex will be turned off for all districts on **June 12<sup>th</sup>**. Before the download will be turned back on 1) **the district must post a new flat file to the ftp site**, and 2) **the district must contact Support once the district's SIS has been rolled forward to request it be turned back on.**

**\*\*\*NOTE:** Please contact Support if your district will be switching to different Student Information System (SIS) this summer so they can help coordinate getting Connex turned back on for the district.

### **What is Rollover?**

The summer rollover is a process conducted by SuccessEd to finalize data for one school year, activate the next academic calendar and advance student grades and campuses as appropriate. Forms locked in one academic year cannot be unlocked post-rollover. For the purposes of data integrity, it is recommended that all completed evaluations and meeting forms be locked prior to rollover. Draft forms do not affect the rollover process, and information found on existing draft forms will remain after rollover with updated Academic Year, campus and grade information reflected in the form header.

Specifically, the following events occur during rollover for each student in the SuccessEd

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application:

1. The student's English Learner *Monitor* Status will progress one year on Student Demographics.
2. The student's Next Campus becomes their Current Campus.
3. The student's Next Grade becomes their Current Grade.
4. All students with an inactive status across *all* products are moved to the district's inactive campus which is commonly named Beyond High School or Inactive (Campus ID = 456). At any time, these students can be moved back to a campus and reactivated in a program if the need arises. For districts subscribing to Connex, once the download is resumed, students who are inactive in programs but remain enrolled in the district will move back to their current campus for easy access to existing records.
5. For districts using SE Manager, the rollover process also does the following:
  - a. updates the Special Education Status on Program Compliance:
    - i. Initial and Transferred students are updated to Active.
    - ii. Status of students with a Next Grade of GR are updated to Graduated.
  - b. PEIMS 163 records are created for the first day of school for all Active special education students.
6. If selected, for districts using ELLA, the rollover process advances the number of years in U.S. schools on Program Compliance for students if the Customization Option has been turned on. The pathway for the customization is **District Admin > Districts > Edit Customization Options > Bilingual/ESL**; click the box for 'Advance years in U.S. Schools on Program Compliance at Rollover.' \*\*\*NOTE: Districts will want to check the Years in U.S. Schools field to verify information has been entered by running the Programs – Bilingual/ESL report or by running a Custom Report and selecting Years is US Schools as an option from the Compliance options along with Bilingual/ESL from the Status options. If nothing has been entered into the field, users will want to enter the number and save the students Program Compliance screen.
7. For all programs, forms left in draft will be updated to reflect the new Academic Year (e.g., 2025-26 will become 2026-27).
8. For districts who manually assign student rosters via the District Admin > Users

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> Edit User Roster screen, this information will be removed during the rollover process. Administrators will need to re-assign students to staff for the new school year unless the district is utilizing rostering through an automated process.

### Pre-Rollover

\*\*\***NOTE**: See the Pre-Post Rollover checklist for the complete list of the recommended reports to run for the district.

### Step 1: Save the date!

July 8<sup>th</sup> is the scheduled rollover date for *all* districts.

### Step 2: Verify the appropriate forms are locked.

Verify which draft forms should be locked and which can remain in draft by running the Students by Forms report. This report can be found in **Reports > X > Students by Form** (Note: X = *Program preparing for Rollover*).

1. For SE Manger, IEP meetings that occurred in this school year must be locked for the start-of-school PEIMS 163 record to be created accurately. (Note: IEP meetings that have not yet occurred should stay in draft, and data will be maintained on the draft IEP.)
2. For SE FIE, Full and Individual Evaluation reports that were completed this school year should be locked to ensure accuracy. \*\*\***NOTE**: FIEs that are not yet complete can stay in draft, and data will be maintained on the draft SE FIE.)
3. For SE IEP Goals, progress reports for goals currently in effect remain active. **IMPORTANT**: Do not master or discontinue Subject/Focus areas that remain in effect for the start of the 2026-27 school year. Goals completed during 2025-26 cannot be reactivated after rollover.
4. For clients subscribing to SE 504, ELLA and RtI, forms are locked at the district's discretion. Draft forms do not affect the rollover process, and information found on existing draft forms will remain after rollover with updated Academic Year, campus and grade information reflected in the form header. However, throughout the application, it is highly recommended that locking occurs as soon as a form has been completed to maintain a record of

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decisions made and improve the accuracy of reporting.

### **Step 3: Run SPP Indicator reports.**

To ensure all students and relevant data are captured for current reporting periods, be sure to work and finalize your SPP Indicator report data prior to rollover.

1. **SPP Indicator 6** – Provides a list of students aged 3-5 for whom a COS form may need to be completed. Helps prep/verify SPP Indicator 7.
2. **SPP Indicator 7** – Ensure all needed COS Entry and Exit records have been completed and locked prior to running your final report.
  - a. Use SPP Indicator 6 to look for any students that may be missing from your SPP Indicator 7 report.
3. **SPP Indicator 13** – Ensure all Supplement Transition/SPP Indicator 13 Folder Review and/or Transition: SPP Indicator 13 Folder Review forms are locked.
4. **TSDS Child Find** – Ensure all Full and Individual Evaluation/Upload and IEP Meeting forms are complete, dated correctly, and locked.
  - a. **SPP 11:**
    - i. Run the Referral Timelines report, looking at the SPP Indicator 11 table. Only students that will be completed during the following academic year, FIIE and/or IEP Meeting, remain on the report.
    - ii. Verification of SPP 11 may also be done using Custom Reports.
      1. Select Current Campus and Grade in the Enrollment column.
      2. Select the desired, or all, SPP Indicator 11 data points in the Compliance column.
      3. Choose Special Education under status.
      4. Export to Excel and filter as desired (consider looking at dates and statuses first to help narrow down your results).
  - b. **SPP 12:**
    - i. Run the Referral Timelines report, looking at the SPP Indicator 12 table. Only students that will be completed during the following academic year, FIIE and/or IEP Meeting, remain on the report.
    - ii. Verification of SPP 12 may also be done using Custom Reports.
      1. Select Current Campus and Grade in the Enrollment column.

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2. Select the desired, or all, SPP Indicator 12 data points in the Compliance column.
3. Choose Special Education under status.
4. Export to Excel and filter as desired (consider looking at dates and statuses first to help narrow down your results).

**\*\*\*NOTE:** *It is imperative that districts run the SPP Indicator and TSDS Child Find reports listed above due to automatic status changes and students being transitioned to the Inactive/Beyond High School campus as a part of the summer Rollover process.*

### **Step 4: Run Rollover Preparation report.**

To verify the completeness of Campus and Grade information, run the **Rollover Preparation** report in **Reports > Administrative**. Items with a red “x” should be addressed.

### **Step 5: Verify accuracy of the academic year and school day calendars.**

**\*\*\*NOTE:** Prior to summer rollover, administrators **must** enter the districts Academic Year Calendar.

- If the calendar has not been entered prior to the Rollover date, the districts Rollover will not occur.
- The district will need to contact SuccessEd once the calendar has been entered, so we can coordinate Rollover with our development team.

1. As early as possible, enter dates for the district’s 2026-27 board-approved academic school year if the district subscribes to SE Manager and/or ELLA.
  - a. Go to **District Admin > Districts > Academic Year Calendar**.
  - b. Select **2026-27** from the **Select an Academic Year** dropdown.
  - c. Address the required (highlighted) fields.
  - d. If the district subscribes to **SE IEP Goals**, populate the **6-Week** and/or **9-Week Reporting Period End Dates**.
  - e. Click **Save**.
  - f. Click **Set School Day Calendar** button.
  - g. Click each date that is a non-school date between the First and Last days of the school year. Note: Weekends are already selected.

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- h. Upon completion, click **Return to Academic Year Calendar**.
2. Verify that district and campus information has been edited to reflect the next school year by running the **District & Campus Information** report. This report is found in **Reports > Administrative > District & Campus Information**.
  - a. If needed, correct dates in District Admin > Districts > Academic Year Calendar.
  - b. Correct campus information in District Admin > Campuses > Add/Edit Campuses. Ensure each campus has a Next Campus per the district feeder pattern.
  - c. Ensure each campus has the appropriate 6- or 9-week Report Period indicator if the district subscribes to SE IEP Goals.
  - d. SE Manager users should edit the campus' Instructional Time as needed.

### **Step 6: Verify Enrollment information.**

Verify **Next Campus** and **Next Grade** information. This report can be found in **Reports > X > Student Campuses and Grades** (Note: X = Program preparing for Rollover).

1. Supply/edit information in Student Information > Enrollment tab. Students will not roll correctly if information is missing (i.e., Next Campus), and districts should manually correct missing information after the rollover has completed.
  - a. Program Name will only show if the Report category is SE Manager. Program Name fields are not required for rollover but may prove helpful when planning for the next school year.
  - b. For districts not using SE Manager, the Home Campus and Next Home Campus fields are not required.
2. Edit **Next Grade** on all students being retained.
  - a. Consider Next Grade on EEs (i.e., do they remain EE or change to PK or KG based on age and eligibility?).
  - b. Consider Next Grade on all 12<sup>th</sup> graders who will not graduate (i.e., do they remain 12 or change to PS?).
  - c. Consider Next Current Campus for all students going to a new campus opening in the fall.

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### Post-Rollover

\*\*\***NOTE**: See the Pre-Post Rollover checklist for the complete list of the recommended reports to run for the district.

#### **Step 7: Verify rolled data.**

Run the *Student Campuses, Grades and Program Names* report post rollover to verify that students were promoted to the correct campuses and grades. \*\*\***NOTE**:

1. If the district subscribes to the SuccessEd Connex download, campus information will be automatically updated for students based on SIS enrollment once Connex is turned back on.
2. ***When the district has verified their SIS has rolled, the district must contact SuccessEd so we can schedule turning the Connex download back on for users.***

#### **Step 8: Verify creation of PEIMS 163 record for students in special education.**

To ensure accurate reporting for the 2026-27 school year, run the *PEIMS 163 Snapshot* report located in *Reports > SE Manager > PEIMS 163 by Snapshot Date*. Use the first day of school as the Services Start Date. These records are created from students' "Next" Determination of Services section from the last locked IEP.

#### **Additional Reports that may be run to aid in planning/closing the current school year**

1. All Programs: ***Staff Information*** – Verify users have the appropriate campuses, products, roles and status. This report allows for easy identification of users to be deactivated and those for whom changes need to be made to their products, campuses, and roles. **NOTE**: If a new campus was added, verify that staff needing access to that campus are given the campus (including the District Admin).
  - a. Select the category of Administrative and the report Staff Information.
  - b. Select the desired parameters (campus, staff members, products, and roles).
  - c. Select the desired Status.
  - d. Click "View Report".
2. All Programs: ***Lock Comparison Report*** (meeting and/or evaluation forms)
  - a. Select the category of Administrative and the report Lock Comparison.
  - b. Select the desired parameters (campus, status, grade, student, and

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- locked by).
  - c. Input the desired Start and End Dates.
  - d. Select the desired form (IEP Meetings, FIE, 504, and/or ELL) in the Form Types dropdown.
  - e. Click “View Report”.
3. All Programs: **Students by Form** – Ensures key forms are locked prior to staff check-out and provides list of any forms needing to be completed in the new school year.
- a. Select the appropriate category and the report Students by Form.
  - b. Select the desired parameters (campus, status, grade, case manager and student).
  - c. Select the form name.
  - d. Select the desired lock status (both, draft, locked).
  - e. Input the desired Start and End Dates.
  - f. Click “View Report”.
4. Special Education: **Federal Count Data List** – Allows for quick and easy identification of students in need of an IEP Meeting or FIE based on any particular date.
- a. Select the category of Special Education and the report Federal Count Data List.
  - b. Select the desired parameters (campus, status, grade, case manager and student).
  - c. Input a Report Date.
  - d. Select the Compliance Type: Non-Compliant (for those students out of timelines), Compliant (those that are within timelines), or Both.
  - e. Click “View Report”.
5. Special Education: **Student Campuses, Grades and Program Names, Class List by Subject** and/or **Related Services by Service** reports – Allow you to predict staff needed for the following school year.
- a. Select the category of Special Education and the report name.
  - b. Select the desired parameters (campus, status, subject, related service, etc.).
  - c. Click “View Report”.

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### Reports to consider running Pre-Rollover:

Run the following reports to capture information from meeting decisions during the 2025-26 school year and to ensure all forms have been locked.

<input type="checkbox"/>	Administrative: District and Campus Information report
<input type="checkbox"/>	Administrative: Rollover Preparation report
<input type="checkbox"/>	Administrative: Staff Information report
<input type="checkbox"/>	All Programs: Students by Form report
<input type="checkbox"/>	All Programs: State Assessments report
<input type="checkbox"/>	All Programs: Student Campuses and Grades report
<input type="checkbox"/>	Special Education: Extended School Year (ESY) Services report
<input type="checkbox"/>	Special Education: PEIMS 163 by History report
<input type="checkbox"/>	Special Education: SPP Indicator 6, 7, 13, TSDS Child Find reports
<input type="checkbox"/>	Special Education: Staff Planning report

### Reports to consider running Post-Rollover:

<input type="checkbox"/>	Administrative: Lock Comparison report
<input type="checkbox"/>	Administrative: Staff Information report
<input type="checkbox"/>	All Programs: Student Campuses and Grades report
<input type="checkbox"/>	Special Education: PEIMS 163 by Snapshot Date report
<input type="checkbox"/>	Special Education: Federal Count Data List report
<input type="checkbox"/>	Special Education: Class List by Subject report
<input type="checkbox"/>	Special Education: Related Services by Service report
<input type="checkbox"/>	Special Education: Staff Planning report
<input type="checkbox"/>	ELLA: Bilingual/ESL Record report
<input type="checkbox"/>	504: Section 504 Compliance report