Running the New School Year Setup Processes
Touchline Support Article (TSA) #180801

Special Note

This TSA is intended for use on, or shortly before/after, the first day of each school-year (before work permits are issued for the upcoming school-year). These processes should not be run more than once each year.

Step 1

From the program's Main Switchboard use the Menu Bar to select:

- Navigation / System Configuration / Express Settings
  Update the following fields:
    - Start of School
    - End of School
    - Permit Expiration
    - Permit Remarks (optional)
  Close the form, all changes will be saved.

Step 2

From the program's Main Switchboard use the Menu Bar to select:

- Utilities / Data / New School Year Setup
- Click the "Set Standard Default Options" checkbox (any of the processes may be individually unchecked if desired).

  It's generally safe to run all of the new school year processes. However, if work permits have already been issued in the new school year, then you should consider the following:
  a. "**Deactivate Graduated Seniors**" – This will set the "Active Status" for all senior students to "Inactive". It's intended for last year's seniors. If you've already changed the grade level of some students to "Senior", then you'll need to manually reactivate their student records (just select their student record and click on the "Actively Enrolled" button to toggle their active status to "Yes".

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b. "**Grade Level Advance**" – Similar to above, but this advances the grade level. If the student's grade level has already been advanced manually, then it will need to be corrected after running this process.

c. "**Cancel Outstanding Permits**" – If work permits have already been issued for the new school year, set the "Issue Date" to the date that the first work permit was issued (for the new school-year). Only permits issued prior to that date will be canceled.

- Click the "Execute Updates" button
- Follow the message prompts and then close the form.

Schools that utilize the program's advanced permit management processes will need to define new probation periods on the Probation Management tab of the Defaults form.

Thank you for choosing **QuickPermit+** for issuing student work permits.