



Year-end Checklist*

Things to accomplish before moving on to the next school year

**All items may not apply to your account. Please follow checklist in order, skipping those that do not apply.*

<input type="checkbox"/> Reconcile Financials	Although financials will roll over from year to year, best practice is to finalize your recordkeeping before moving on to the next year.
<input type="checkbox"/> Grade all Assignments	Check that any late Assignments have been accepted and graded.
<input type="checkbox"/> Finalize all Attendance	Make sure all attendance for events is taken care of
<input type="checkbox"/> Follow up on Repair Requests	Requests will roll over into the next year. However, best practice is to take care of repair issues within the year they occurred.
<input type="checkbox"/> Accept/decline any remaining Volunteer Requests	Requests will roll over into the next year. However, best practice is to take care of these requests within the year they were offered.
<input type="checkbox"/> Resolve any Admin Dashboard alerts	Alerts will remain when the year rolls over. However, to keep your account clean, best practice is to accept new members in the year in which they requested membership. It is also best to resolve any other Admin Dashboard alerts in the year in which they occurred.
<input type="checkbox"/> Return Inventory/Attire	Make sure all Inventory/Attire is returned to your account if members are not keeping these items over the summer months. This will help you start with a clean, updated account in the new year. <i>Reminder: Scanning barcodes is a quick and easy way to do this.</i>
<input type="checkbox"/> Check to see all students have grade level assignments	In order to bring student members into the new year, they must have a grade level assignment. This is their current grade level, not the grade level they are going into. Go to Tools > Tools/Reports > Reports (left hand side) > Member Information > Students with no grade level assigned.
<input type="checkbox"/> Promote students to the new year	Go to Tools > Tools/Reports > Tools (right had side) > People > Promote (end of year). Here you will be able to graduate your students, move them to the next grade level, or even move them to their next building if that school also has a Cut Time account.
<input type="checkbox"/> Get new members into the account	Upload new members into the account and send out Cut Time Registration Invitations.
<input type="checkbox"/> Create new Ensembles	There are two ways to create new Ensembles: 1. Clone the Ensemble – if most of the students will be staying in the same ensemble for the following year. 2. Mass Updater Ensemble/Groups – if most of the students will be moving to different ensembles.
<input type="checkbox"/> Update Member permissions	Make sure to update access/permissions in your account. Go to Tools > Tools/Reports > Reports (left hand side) > Cut Time > Cut Time Access Rights and Permissions. This is a listing of permission access levels within your account. Click on the name and go to the Permissions tab to modify as needed. If adding new permissions, go to the member's profile (People > Members > In the Search box under Ensemble/Group choose All People (all years). Select the member you are looking for. <i>For quick search: Use the small search box under the right-hand corner of the large search box, click Update next to the member's name, and scroll down to the Permissions tab.</i>
<input type="checkbox"/> Update Calendar	Update the Calendar with new school year information; create new Volunteer Opportunities and Event Attendance.
<input type="checkbox"/> Create new Financial Obligations	Create Financial Obligations and assign the members who are required to pay those obligations.