



## End of Year Instructions

Spring, 2021

**Heartland**

*A Global Payments Company*

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## Before You Begin

Before you begin, make sure that all students and adults are in the correct grade prior to starting these procedures. If they are in incorrect grades, they will move up to the next grade regardless of the correct grade. If they are not in a grade, they will not be affected by grade increases. For graduating students, use the Grade called **Graduate**. Use the School **Graduate** as the school for students exiting the school system this year.

The Eligibility Carryover Expiration is normally 30 School Days. The applications will actually roll over on the morning of the date you enter. Please allow for this when selecting the temporary Expiration Date if desired.

**Important:** End of Year procedures must be done from the server where Mosaic is installed (Non-hosted Only).

## MySchoolBucks End of Year Instructions

### Online Payments Customers Only

Perform the following End of Year procedure if your district uses MySchoolBucks for online payment processing.

**IMPORTANT:** Please read the following section in its entirety before attempting the End of Year procedure. It is important that you complete the process in the order listed below as some actions are required and others are suggestions.

### Frequently Asked Questions

#### When should I run my End of Year process?

Running the MySchoolBucks End of Year process is recommended prior to completing any End-of-Year procedures in Mosaic.

#### Is there anything I should do prior to running the process?

Yes.

- It is recommended you inform end-users/parents the last day the district will be accepting funds, your district's refund policy, a reminder to turn off automatic payments for their account if a student has graduated or is leaving the district, and suggest they review their automatic payment amounts.
- Ensure students who will no longer attend school for the upcoming school year are inactive in your POS system.  
**Note:** If a student is not returning, but has a credit on their account and is due a refund, it is recommended that you inactivate the student.
- Import any payments from that have not yet posted.
- Establish Special Dates for non-payment periods.
- Issue refunds via your POS system.

#### What should I do if I am unsure how to proceed?

In the event you have any questions or are unsure how to proceed before or during this process, it is recommended that you call 1-800-803-6755 or contact MSB Support for assistance.

## Update Dashboard

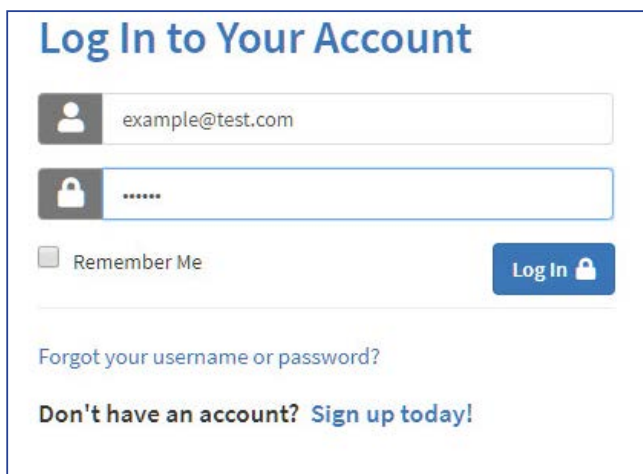
Two weeks before the end of the school, update the Dashboard on the MySchoolBucks website to inform parents of the following:

- The last day you will be collecting lunch funds.
- Your district's refund policy.
- A reminder to turn off all automatic payments on their account for graduating students or students leaving the district.
- Review automatic payment amounts.

As students are promoted to different grades or schools, it is important to remind parents that students' meals may be a higher price, so they may want to revisit the automatic payment amounts to accommodate the change in meal prices.

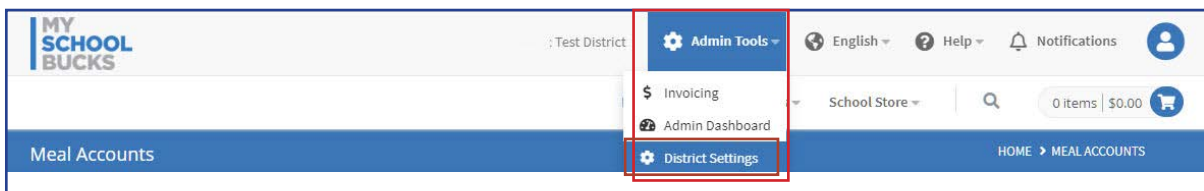
Perform the following procedure to update the Dashboard.

1. From the MySchoolBucks.com home page, enter your District Administrator login information and then click **LOG IN**.

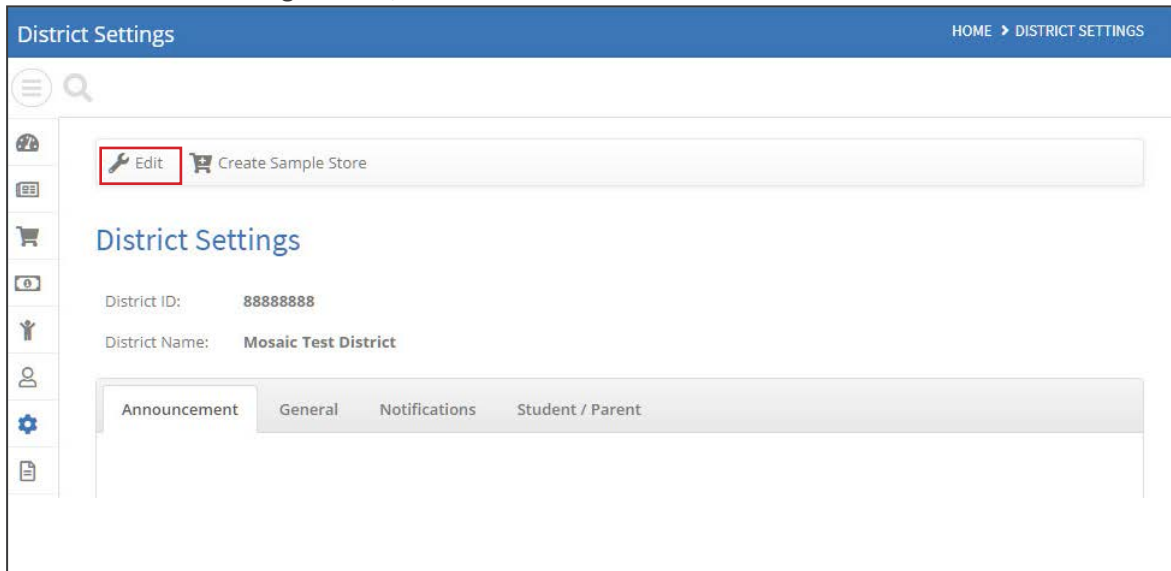


The screenshot shows the 'Log In to Your Account' page. It features a title 'Log In to Your Account' in blue. Below the title are two input fields: the first for an email address (example@test.com) and the second for a password (masked with dots). There is a 'Remember Me' checkbox and a blue 'Log In' button with a lock icon. Below the login fields are links for 'Forgot your username or password?' and 'Don't have an account? Sign up today!'.

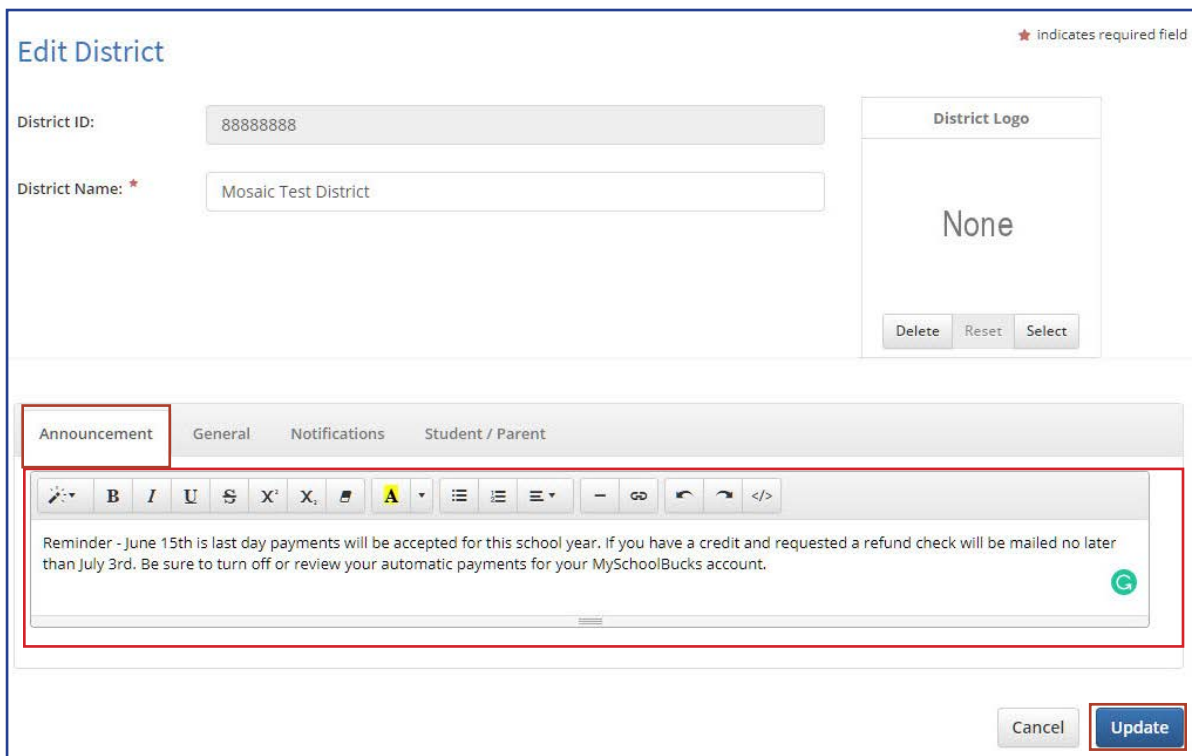
2. From the **Admin Tools** menu, select **District Settings**.



3. From the District Settings screen, Click **Edit**.



4. Select the **Announcement** tab and then type the information in the section regarding the last day you will be accepting payments, your school's refund policy, a reminder to turn off or review automatic payment amounts, etc.
5. Click **Update** to save the information.



## Import Pending Payments

To ensure all pending payments have been pulled from the POS serving lines.

1. Open **Mosaic** and login.
2. Click **End of Day** in the left-hand navigation bar.
3. Click **Close Day**.
4. Verify all serving dates are reconciled. If not, ensure they are reconciled and then click **Close Day**.

## Special Dates

Please review the [MySchoolBucks End of Year Process](#). Completing this process will ensure that manual or scheduled payments setup by the parents will stop during the summer break.

The Special Dates feature might be used if:

- Your school district does not wish to receive online payments over the summer.
- Nutrition server will be turned off over the summer (if server is off, balances will not update after payments are made).
- Your migrating to a new server.

If you have any questions or need additional assistance, feel free to MySchoolBucks Admin Support for additional assistance at 1-855-832-5226, Monday - Friday: 7 a.m. - 7 p.m. (Eastern Time).

## Refund Student Balances

Provide refunds for students in accordance with your district's refund policy, especially for graduating seniors and students leaving the district.

**Reminder:** The MySchoolBucks support team does not retain any funds on behalf of the district or have the ability to process refunds.

## Create a Folder for Archiving Reports

1. On the Desktop, right-click the background of your desktop.
2. Select **New > Folder**.
3. Give the folder the name “Mosaic EOY Year 2021”. This is where you will archive and save the pre-end of year reports.

## Create a Backup

**Note:** This section is for On-Premise Customers only. Please proceed to the Create a Folder for Archiving Reports procedure.

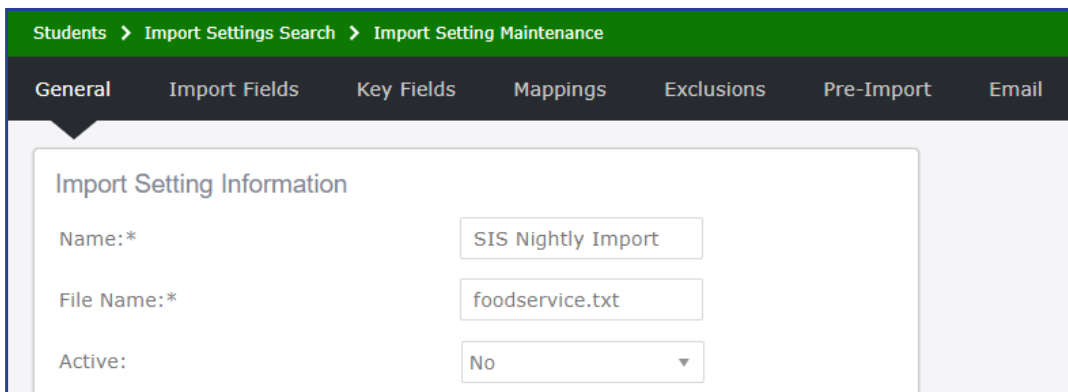
1. Open **Mosaic** and login.
2. Select **Utilities > Backup Database**.
3. In the Backup File name box, type and replace the day of the week with a specific name for the file. The file extension will be “.bak”.  
Example: C:\folder name\Central-BeforeEOY2021.bak
4. Click **Backup Database**.
5. Once the backup is created successfully, store it in a safe and easily accessible location, such as on a Network drive, a USB device, or on an external hard drive.
6. If the backup does not complete successfully, *do not continue*. Contact Mosaic support for assistance.



## Disable the Nightly Student Import

Skip this step if your district does not have a nightly import.

1. Click **Students**.
2. Select **Import Settings**.
3. Locate your district nightly import and select it. Normally, the nightly import is at the top of the list.
4. Select **No** from the Active drop-down menu.



The screenshot shows a web interface for 'Import Setting Maintenance'. At the top, there is a breadcrumb trail: 'Students > Import Settings Search > Import Setting Maintenance'. Below this is a dark navigation bar with tabs: 'General', 'Import Fields', 'Key Fields', 'Mappings', 'Exclusions', 'Pre-Import', and 'Email'. The 'General' tab is selected. The main content area is titled 'Import Setting Information' and contains three input fields: 'Name:\*' with the value 'SIS Nightly Import', 'File Name:\*' with the value 'foodservice.txt', and 'Active:' with a dropdown menu set to 'No'.

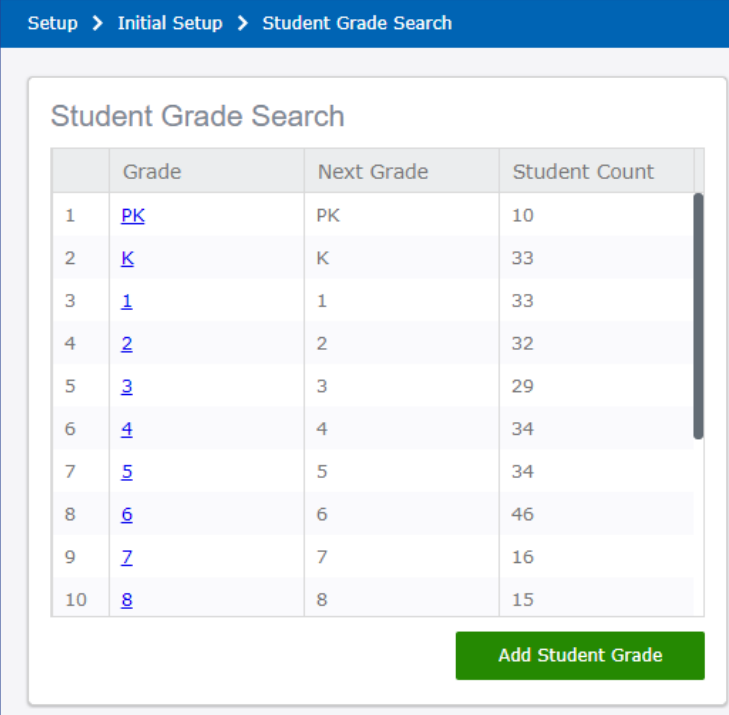
5. When finished, click **Save**.

Please contact Mosaic Support if you are unable to access or perform this step.

# Mosaic Student End of Year Setup

## Grade Progression Setup - District

1. Click **Setup**.
2. Select **Initial Setup**
3. Select **Student Grade**.
4. Review the student grades table. The table includes the Grade and the Next Grade when applicable.
5. For each grade listed, verify and change the Next Grade, if needed. This is for the progression from grade to grade.
6. Click **Add Student Grade** to add a Grade and Next Grade if you notice any missing grades.



Setup > Initial Setup > Student Grade Search

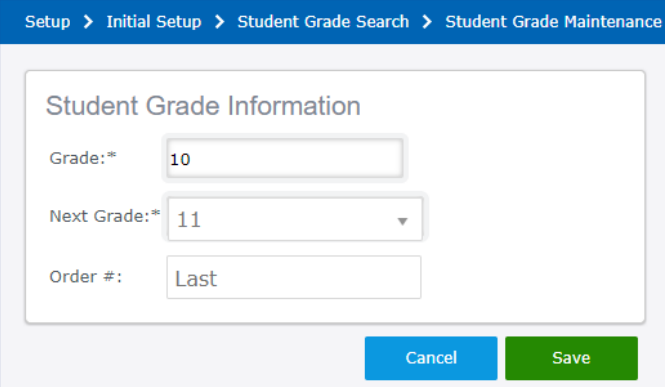
### Student Grade Search

	Grade	Next Grade	Student Count
1	<a href="#">PK</a>	PK	10
2	<a href="#">K</a>	K	33
3	<a href="#">1</a>	1	33
4	<a href="#">2</a>	2	32
5	<a href="#">3</a>	3	29
6	<a href="#">4</a>	4	34
7	<a href="#">5</a>	5	34
8	<a href="#">6</a>	6	46
9	<a href="#">7</a>	7	16
10	<a href="#">8</a>	8	15

**Add Student Grade**

**Note:** The grade “Graduate” is used for students graduating from the school at the end of this year. For example, if your district only goes to grade 6, then the Next Grade for 6 would be Graduate.

7. Type a grade in the **Grade** field.
8. Select a grade from the **Next Grade** drop-down menu. You may also enter the order which you would like the grade to appear on the grade list.
9. Click **Save**.



Setup > Initial Setup > Student Grade Search > Student Grade Maintenance

### Student Grade Information

Grade:\*

Next Grade:\*

Order #:

**Cancel** **Save**

## Grade Progression Setup - Site

1. Click **Setup**.
2. Select **Initial Setup**.
3. Select **School**.
4. Click **Search**.
5. Select the first school from the list.
6. Click the **Close Year** tab.
7. Review the School and Grade Advancement table. The table should include the Grade, Next Grade, and the School that Grade is to be at currently.
8. If the grade progression is different for this specific site, change it here. Mark the grade that is moving out to the correct "Next School".  
It may be necessary that a grade remain the same. In this case, the Grade should point back to itself. For example, putting 5 in both fields would keep that grade from advancing.
9. Click **Save**.
10. Repeat steps 4-8 for each school in the list.

**Note:** The grade "Graduate" is used for students graduating from the school at the end of this year. For example, if your district only goes to grade 6, then the Next Grade for 6 would be Graduate.

Setup > Initial Setup > School Search > School Maintenance - Adams Elementary

General Local Server **Close Year** Other Additional CEP Enrollment Homeroom

### School and Grade Advancement

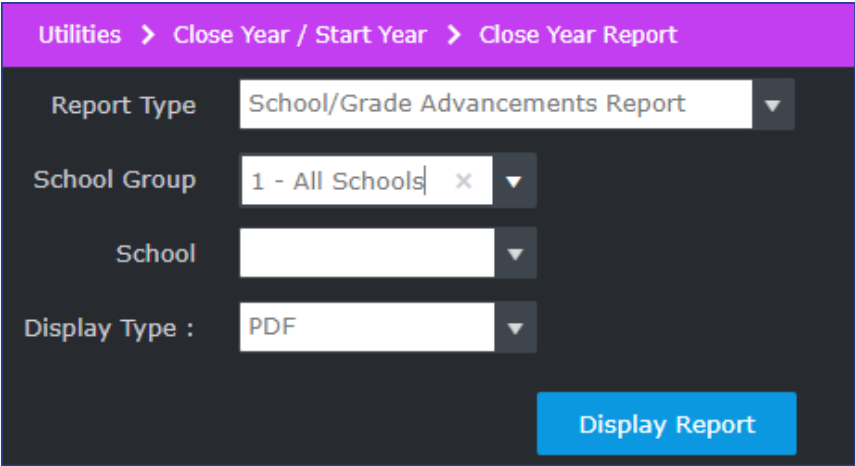
Grade	Next Grade	Next School	Student Count
1	1	Adams Elementary	14
2	2	Adams Elementary	16
3	3	Adams Elementary	15
4	4	Adams Elementary	18
5	5	Adams Elementary	16
6	6	Adams Elementary	23

Delete Cancel Save

## Mosaic Close Year

### Print and Verify the Close Year Report

1. Click **Utilities**.
2. Select **Close Year / Start Year**.
3. Select **Close Year Report**.
4. Change Report Type to **School/Grade Advancements Report**.
5. Click **Display Report**.



The screenshot shows a web interface for generating a report. At the top, a purple breadcrumb trail reads "Utilities > Close Year / Start Year > Close Year Report". Below this, there are four configuration fields, each with a dropdown arrow:

- Report Type:** Set to "School/Grade Advancements Report".
- School Group:** Set to "1 - All Schools" with a small "x" icon to the right.
- School:** An empty dropdown menu.
- Display Type :** Set to "PDF".

A blue button labeled "Display Report" is located at the bottom right of the configuration area.

6. Review the Grade, Next Grade, and School entries of the report.
7. Print and save the report in the Mosaic EOY Year 2021 folder.
8. Repeat sets 4 through 8 for **Report Type Advancement Exceptions Report**.

## Close Year Execute

Perform the following procedure to finalize your school year within Mosaic.

1. From the left-hand navigation bar, click **Utilities**.
2. Select **Close Year Execute**.
3. Click **Close Year Execute**. The Close Year Execute wizard initiates and will guide you through the process.
4. From the New First Day of School field, click the calendar icon and select your district's first operating day of school.
5. Click **Next**.

Utilities > Close Year / Start Year > Close Year Execute

1 - First Day of School      2 - Close Year Action      3 - Carryover Period Actions

**Update Your First Day of School to Proceed:**

Current First Day of School: 9/1/2020

New First Day of School: \* 8/20/2021

Cancel      Next >

- From the Close Year Actions select the desired settings.

**Recommended Settings:**

Advance Schools/Grade & Graduate: **Yes** (Highly Recommended)

Blank Homerooms: **Yes**

Reset Student Account Balances: **No**

Delete Inactive Students: **Yes** (If you choose Yes, you will be prompted for a date; any student made inactive before this date will be deleted.)

Clear Serving Line Notes: **No**

Clear Photos: **Yes**

Remove Inactive Schools from School Groups: **Yes**

Reset Student Bonus Credit Balances: **Yes**

Generate Close Year Archive Reports: **Yes**

Retain Eligibility Record Notes: **No**

- Click **Next**.

- When selecting **Yes** from the Generate Close Year Archive Reports drop-down, your reports will generate. Click **OK** at the Success prompt.

**Recommendation:** Download and save the PDF file in the Mosaic EOY Year 2021 folder for future reference.

Utilities > Close Year / Start Year > Close Year Execute

1 - First Day of School      **2 - Close Year Action**      3 - Carryover Period Actions

**Select Your Close Year Actions:**

Advance Schools/Grades & Graduate: Yes

Blank Homerooms: Yes

Reset Student Account Balances: No

Delete Inactive Students: Yes      Students Inactive Before: 5/7/2018

Clear Serving Line Notes: No

Clear Photos: Yes

Remove Inactive Schools from School Groups: Yes

Reset Student Bonus Credit Balances: Yes

Generate Close Year Archive Reports: Yes

Retain Eligibility Record Notes: No

Cancel      < Back      Next >

- From the Carryover Period Actions select the desired settings.

Recommended Settings:

**Carryover Period Expiration Date:** Click the calendar icon and select the date when students will begin paying full price.

**Apply Carryover Eligibility to F&R Students without a Current Year Eligibility Record:** Set to **Yes**, if you want to extend Carryover Eligibility to students with Free or Reduced type status until the date specified above.

**Apply Carryover Eligibility to CEP/Prov Students who Advance to a Non-CEP/Prov School:** Select **Yes** if you participate in CEP or Provision programs. Select **No** if you do not participate in these programs.

Apply Carryover Eligibility to Current Year F&R Eligibility Records: **Yes**

- Click **Close Year**.

Utilities > Close Year / Start Year > Close Year Execute

1 - First Day of School      2 - Close Year Action      3 - Carryover Period Actions

**Set Your Carryover Period Expiration Date and Select Actions:**

Carryover Period Expiration Date: 10/4/2021

Apply Carryover Eligibility to F&R Students without a Current Year Eligibility Record:\* Yes

Apply Carryover Eligibility to CEP/Prov Students who Advance to a Non-CEP/Prov School:\* Yes

Apply Carryover Eligibility to Current Year F&R Eligibility Records:\* Yes

**Warning! This process is irreversible and should be run after ALL Manager's work is complete for the School Year!**

You may only run this process once! Please review the End of Year Documentation before proceeding.

Cancel    < Back    Close Year

- The Close Year in progress message displays. Remain on this screen until the Success prompt displays and then click **OK**.

## Update the Student Status Translation

Only update this if you use student statuses other than Free, Reduced, and Paid.

1. Click **Setup**.
2. Select **Initial Setup**.
3. Select **Student Status**.
4. Click the **Translation** tab.
5. Edit each translation with the necessary changes.
6. Click **Save**.



## Mosaic End of Year Completion Procedures

### Restarting the Mosaic Scheduler (Distributed Model Only)

1. From your desktop, click **Start**.
2. Click **Control Panel**.
3. Click **Administrative Tools**.
4. Select **Services**.
5. Locate and select **Mosaic Scheduler**.  
**Note:** the Status column will be blank.
6. Click **Start** to start the Mosaic Scheduler service.  
**Note:** the Status column should now read "Started".

**When finished, perform a backup of your database and copy any saved reports to a secure location for future use.**



If your District uses MySchoolApps to import free & reduced applications online, you may now run the End of Year process for MySchoolApps.

## Support

### Phone

For additional support, please contact Technical Support between the hours of 7 AM EST and 7 PM EST at 800-256-8224.

### Email

mosaicsupport@e-hps.com

### Support Central

For the most up-to-date help and support information, please visit our new library of articles at:

<https://help.heartlandschoolsolutions.com/>

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