End-of-Year Rollover Checklist

A step-by-step checklist for archiving the current academic year and setting up your new student cohort in AchievoEDU.

All Plans | Allow 2–3 hours | Complete in Term 4 Week 9–10

Overview

At the end of each academic year, schools need to complete a rollover process in AchievoEDU. This involves three broad phases: exporting and reviewing the year's data, archiving the current year to reset student balances, and then setting up fresh year groups, classes, and student cohorts ready for the year ahead.

This checklist walks through each phase in the correct sequence. The order matters, particularly the export steps, which must be completed before archiving. Do not skip or reorder sections unless you are certain the steps are independent.

The full process takes approximately 2–3 hours if all data is prepared in advance. We recommend scheduling a dedicated admin block in Term 4, Weeks 9–10, with a second admin available to assist if possible.

IMPORTANT — READ BEFORE YOU BEGIN

Complete data export steps in Section 1 before rolling over. Once the rollover occurs, point balances and reward redemption history are reset for all students. This cannot be restored to the live system.

Section 1 — Before Rollover: Export & Review

Timeline: Term 4, Weeks 9–10

Before anything is archived or changed, export a complete record of the year's activity. These exports *serve as your school's official record of engagement, and the data is genuinely useful for end-of-year* reporting, pastoral review, and planning next year's approach.

Data Export & Review

- ☐ Download the years data - *Admin → Reports → Export – Determine which CSV files you want to download and save all exported files to your school server or shared drive, not just your local machine*
- ☐ Review the data: identify students who were consistently highly engaged — *Consider special recognition at the end-of-year assembly*
- ☐ Identify students who rarely or never engaged with the platform — *Note for pastoral follow-up at the start of the new year*

TIP — SHARE WITH LEADERSHIP

Share the engagement summary with your leadership team before year end. It's a strong data point for your annual report. A simple one-page summary showing total points awarded, top earners, and most popular rewards is usually sufficient.

Section 2 — End-of-Year Activities (Optional but Recommended)

Timeline: Final 2–3 weeks of Term 4

Before rolling over the system, consider running a brief end-of-year celebration campaign. These activities take minimal effort but have a meaningful impact on student sentiment and help students spend down accumulated points before the reset.

End-of-Year Celebration Activities

- ☐ Run an end-of-year 'spend up' event — *Announce a period where store items are on sale so students spend before the reset*
- ☐ Post a congratulatory school notice acknowledging the year's collective achievements
- ☐ Award special end-of-year badges — *These are carried through to the next year*
- ☐ Publish final leaderboard standings in morning notices or the school newsletter
- ☐ Send a shout-out to the top 5 point earners across the school

Section 3 — Archive the Current Year

Timeline: Final week of Term 4

Once all exports are saved and any end-of-year activities are complete, you are ready to roll up the year

Archive Process

- ☐ Confirm all exports from Section 1 are saved and backed up to the school server
- ☐ Navigate to Admin → Uploads → Year Rollover
- ☐ Review the rollover summary screen — *This provides you with two options. One to rollover and keep available points, one to reset available points starting with 0*
- ☐ Click 'preview rollover and confirm the action — *This archives year 12's and progresses all other students one year level. Depending on your choice it will also (resets all student point balances to zero)*
- ☐ Verify the rollover *- by checking a student in each year level, there should be 0 year seven students*

Section 4 — Update Year Groups & Classes

Timeline: Week 1 of new year (before students return)

With the year archived, update your school's structure to reflect the new academic year. This includes promoting year groups, removing departed students, and updating class and teacher assignments.

Year Group & Class Updates

- ☐ Promote all existing year groups by one year — *Use the bulk promote tool under Admin → Manage → Uploads → Year Rollover*
- ☐ Remove students who have left the school — *Archive the students rather than deleting where possible, to preserve data integrity*
- ☐ Update class assignments for all returning students to match new timetable
- ☐ Deactivate departed teacher accounts — *Go to Admin → Users → select teacher → Archive Account*

- ☐ Update teacher class assignments to match the new timetable and staffing structure

Section 5 — Import New Students

Timeline: Weeks 1–2 of new year

New students (typically your incoming Year 7 cohort, or equivalent) need to be imported before they can log in. AchievoEDU supports bulk import via CSV, which can usually be exported directly from your school's MIS (e.g. Compass, Sentral, TASS, Edumate).

New Student Import

- ☐ Prepare the new student CSV from your MIS system *— Required columns: first_name, last_name, email, Date of birth, year_group, house, class*
- ☐ Import new students via Admin → Students → Import CSV
- ☐ Review the import preview carefully and confirm the student count is correct before finalising *— Check for duplicate entries, missing emails, or incorrect year group assignments*
- ☐ Confirm import — new students are created with zero points (this is correct)
- ☐ Send login credentials to new students via the platform's bulk email tool
- ☐ Email parents of new students the parent communication letter *— A template is available at achievoedu.com.au/resources/parent-letter*

Section 6 — Reconfigure the Store & Platform

Timeline: Weeks 2–3 of new year

The Reward Store and platform settings carry over after rollover, but they should be reviewed and refreshed for the new year. Items that ran out of stock, badges that are no longer relevant, or point categories that no longer match your school's focus areas should all be updated.

Store & Platform Refresh

- ☐ Review all Reward Store items — remove expired items and update prices if needed
- ☐ Restock physical items that were depleted at end of year
- ☐ Add at least 2 new items to freshen up the store for the new cohort
- ☐ Review and update badge criteria if your school's recognition focus areas have changed
- ☐ Update point categories if competency or behaviour focus areas have shifted
- ☐ Run a welcome-back school notice *— Something brief and warm — 'Welcome back! You can start earning points from Day 1.'*
- ☐ Consider awarding 'Welcome Back' bonus points (optional) *— A small bonus (e.g. 20–30 points) for all students on the first week*

Section 7 — Staff Communications

Timeline: Week 1–2 of new year (staff days)

New staff need to be onboarded before students arrive, and returning staff often benefit from a brief reminder at the start of the year.

Staff Onboarding & Communications

- ☐ Create accounts and onboard any new teaching or admin staff added over the break — *Admin → Usera → Add User*
- ☐ Send all staff a reminder email about AchievoEDU with the direct login link
- ☐ Include AchievoEDU in your first staff meeting agenda (5 minutes is sufficient) — *Brief reminder of how to award points and any changes for this year*
- ☐ Update staff class assignments in the admin panel to match the new timetable
- ☐ Brief new staff individually, or pair them with an experienced staff user — *Aim for new staff to feel confident awarding their first points within their first week*

Section 8 — New-Year Launch Confirmation

Timeline: End of Week 2 of new year

By the end of the second week of the new year, run through this final confirmation checklist to ensure the rollover is complete and the platform is operating normally.

Launch Confirmation

- ☐ At least 80% of returning students can log in successfully
- ☐ All new students have received their login credentials and at least 50% have logged in
- ☐ At least one teacher has awarded points to students in the first week
- ☐ Reward Store has 8 or more active items available
- ☐ First school notice for the new year has been posted
- ☐ Wellbeing check-ins are running as expected (Plus/Pro plans) — *Confirm at least one full school day of check-in data has been collected*