

# End of School Year Process (Food Service)

Last Modified on 12/14/2025 8:45 pm CST

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This article provides some step-by-step recommendations and best practice instructions for Food Service end of school year processes. This includes student account and PIN processes, mailing letters to households concerning student balances, and terminal maintenance.

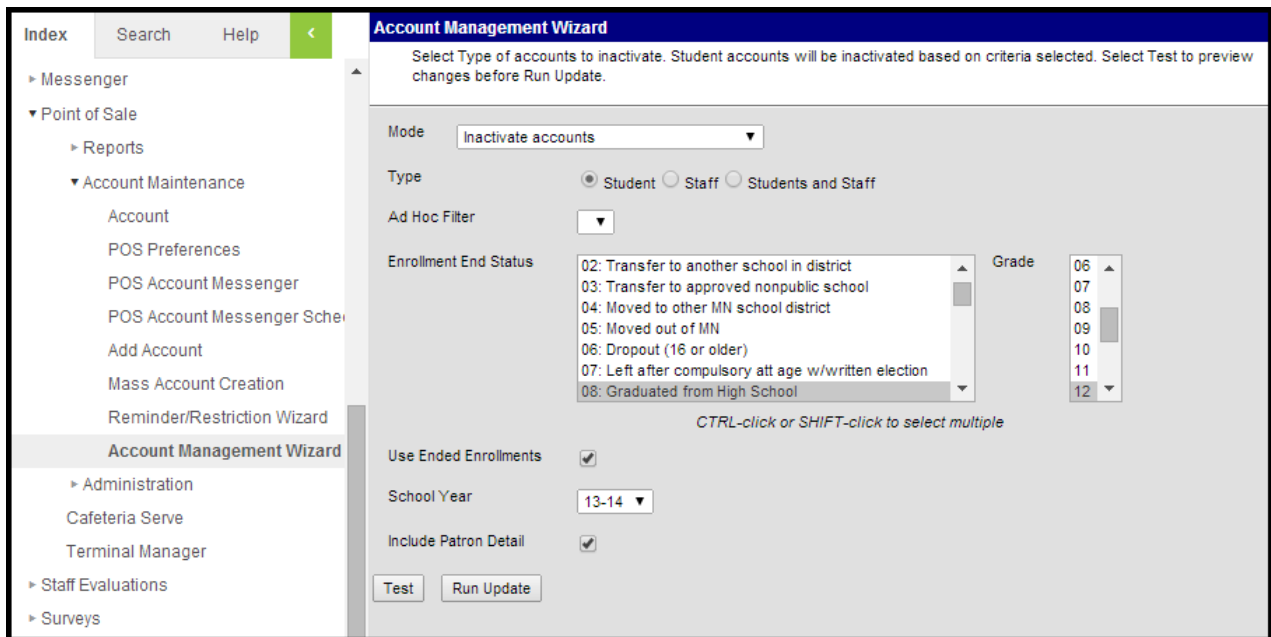
Please note that the following processes may not align with your district's end of year processes.

## Inactivate Graduated Student Accounts

Tool Search: Account Management Wizard

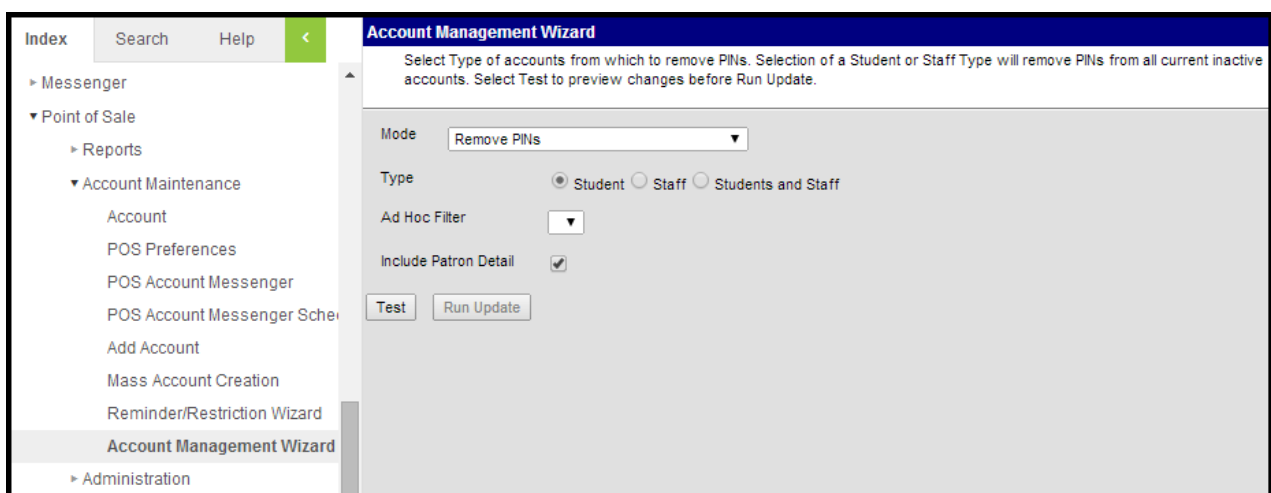
Students must be marked as inactive after they have graduated from school. The student's PINs can be removed and returned to Campus for future use by other students. The **Mode** options under the **Account Management Wizard** provide options for users to manage student account information and balances.

1. Select **Inactive accounts** from the **Mode** dropdown.
2. Choose the **Student** option as the **Type**.
3. Optional: select an **Ad Hoc Filter**.
4. Scroll down the **Enrollment End Status** field and select **Graduated from High School**.
5. Select the appropriate grade (e.g., 12) from the **Grade** field.
6. Mark the **Use Ended Enrollments** box.
7. Select the current **School Year** that is ending.
8. Mark the **Include Patron Detail** box to view student names with the total number of graduated students.
9. Click the **Test** button to view the results of the report before making changes to the database. To finalize these changes, click on **Run Update**. The results appear in another window.



## Remove Student PINs

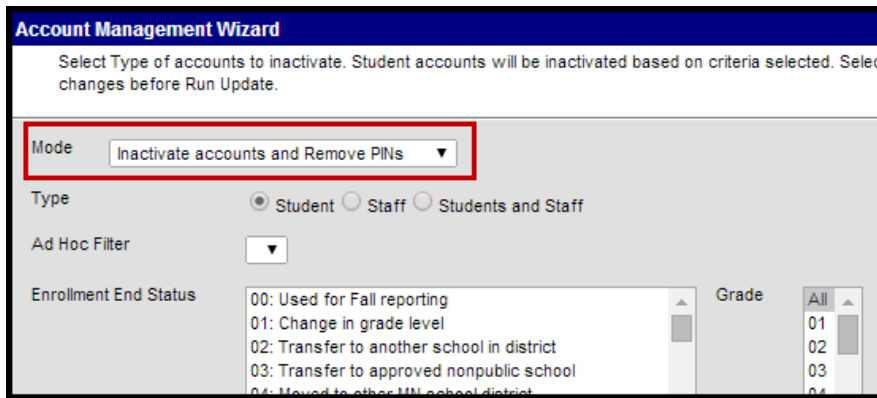
1. Select **Remove PINs** from the **Mode** dropdown.
2. Choose the **Student** option as the **Type**.
3. Select the **Ad Hoc Filter** from the dropdown options to narrow the number of students whose PINs will be removed.
4. Mark the **Include Patron Detail** box to view student names instead of just the total number of graduated students.
5. Click the **Test** button to view the results of the report before making changes to the database. To finalize these changes, click on **Run Update**. The results appear in another window.



## Inactivate Graduated Student Accounts and Remove Student PINs

You can also mark graduating student accounts as inactive and remove their PINs from the system

at once by selecting **Inactive accounts and Remove PINs** from the **Mode** dropdown and completing the report editor. With this option, an **Ad Hoc Filter** is not necessary to remove PINs - the student's PINs that are removed are those with the selected **Enrollment End Status**. For end-of-year purposes, this is due to graduation. This option is used most often by districts.



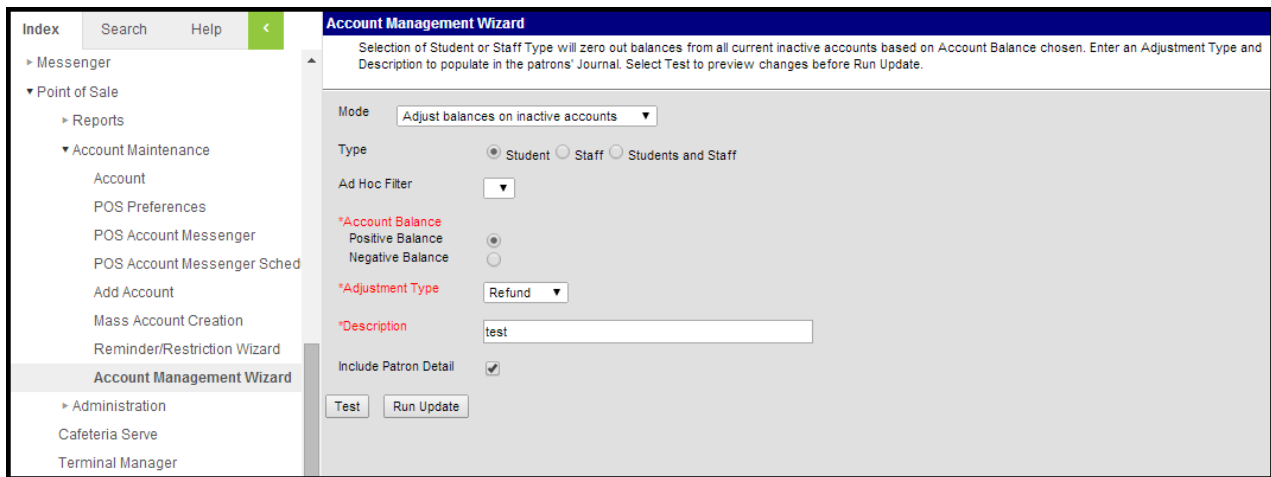
## Adjust Inactive Student Account Balances

Inactive student accounts with positive or negative balances at the end of the school year can be adjusted. This leaves a description of the adjustment on the student's Journal tab.

1. Select **Adjust balances on inactive accounts** option from the **Mode** dropdown.
2. Choose the **Student** option as the **Type**.
3. Select an **Ad Hoc Filter**. (Optional)
4. Mark either **Positive Balance** or **Negative Balance** as the Account Balance option.
5. Choose an **Adjustment Type**. Default options include: Bad Debt, Refund, and Write-Off.
6. Include a **Description** of the adjustment.

This description can be seen on the Portal by parents as well as on the student's Journal tab.

7. Mark the **Include Patron Detail** box to view student names instead of just total numbers.
8. Click the **Test** button to view the results of the report before making changes to the database. To finalize these changes, click **Run Update**. The results appear in another window.



# Run the Adjustment Report

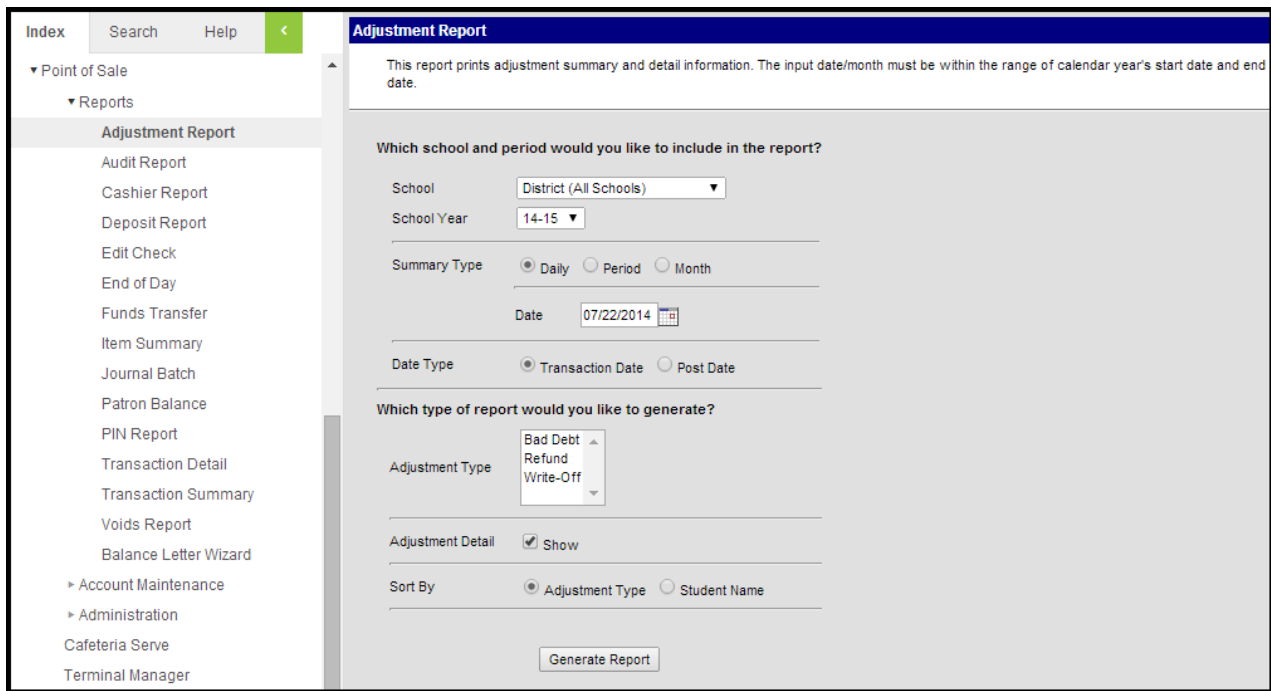
Tool Search: Reports

After student accounts have been adjusted, districts can reference these changes by running an **Adjustment Report** to view these records.

1. Select an individual school or choose **District (All Schools)** from the **School** dropdown.
2. Select a **School Year**.
3. Select a **Summary Type**. Options include: Daily, Period, and Month.
4. Select a **Date Type**. Options include the **Transaction Date** or the **Post Date**.
5. Choose an **Adjustment Type** for the report. Default options include: Bad Debt, Refund, and Write-Off.

The Date options depend on the Summary Type selected. For any date, the input date must be within the range of the calendar year's start date and end date. Input a day, start date, and end date, or month in which to run the report.

6. Mark the **Adjustment Detail** box.
7. Select how you would like to sort the report from the **Sort by** options: **Adjustment Type** or **Student Name**.
8. Select **Generate Report**. The results appear in another window.



**Adjustment Report**

This report prints adjustment summary and detail information. The input date/month must be within the range of calendar year's start date and end date.

Which school and period would you like to include in the report?

School:

School Year:

Summary Type: ☒ Daily ☐ Period ☐ Month

Date:

Date Type: ☒ Transaction Date ☐ Post Date

Which type of report would you like to generate?

Adjustment Type:

Adjustment Detail: ☒ Show

Sort By: ☒ Adjustment Type ☐ Student Name

## Send Letters to Households

Districts can send out letters to households notifying them of the student's account current balance through the **Patron Balance** report. Districts can also send a letter with the use of the **Balance Letter Wizard** or through **POS Account Messenger**.

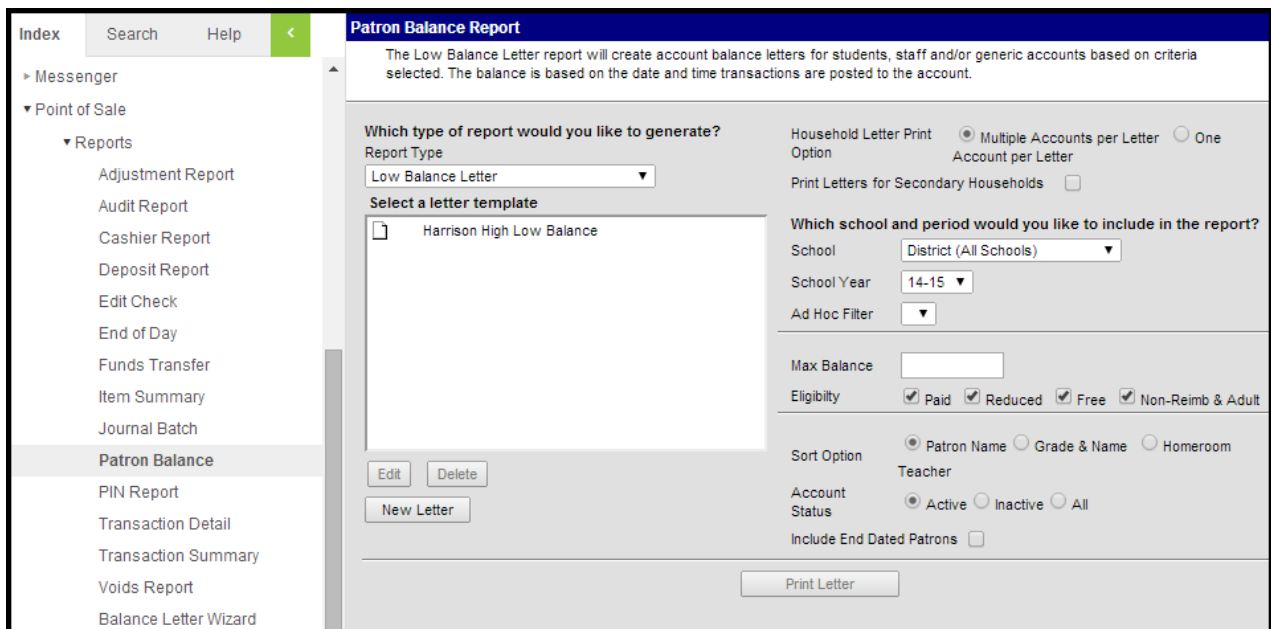
To send a letter to a household regarding an account's low balance through the **Patron Balance** report:

1. Select **Low Balance Letter** from the **Report Type** dropdown.
2. Choose a **Household Letter Print Option**. Select **Multiple Accounts per Letter** if there are multiple students with Food Service accounts residing in the same household or select **One Account per Letter**.
3. Mark the **Print Letters for Secondary Households** check box. (Optional)
4. Reports can be run for individual schools and all schools in the district. Select a school or choose **District (All Schools)** from the **School** dropdown.
5. Select a **School Year**.
6. Select an **Ad Hoc Filter**. (Optional)
7. Input a **Maximum Balance** value. (Optional)
8. Select **Eligibility** options. Check box options include: Paid, Reduced, Free, and Non-reimb & Adult.
9. Select **Sort Options**. Options include: Patron Name, Grade & Name, and Homeroom Teacher.
10. Select an **Account Status**. Options include: Active, Inactive, and All.
11. Mark the **Include End Dated Patrons** check box. (Optional)
12. Select an existing template from the **Select a letter template** options or create a new template by selecting **New Letter** without selecting a template. Complete one of the following options:

Option	Procedure
<b>Select a letter template</b>	<p>If a template is selected, click <b>Edit</b>. A template letter detail will appear.</p> <p>Anything in a white text box will print as it shows in the detail editor.</p>
<b>New Letter</b>	If a template is not selected, click <b>New Letter</b> and create a new template.

13. After the letter editor detail is modified to fit your specifications, click **Save**, **Copy**, **Print Sample**, or **Back** to further edit the letter options.
14. Select **Print Letter**.

For more details about Patron Balance information and reporting, see the [Patron Balance](#) page.



**Patron Balance Report**

The Low Balance Letter report will create account balance letters for students, staff and/or generic accounts based on criteria selected. The balance is based on the date and time transactions are posted to the account.

Which type of report would you like to generate?  
 Report Type: Low Balance Letter

Select a letter template  
Harrison High Low Balance

Household Letter Print Option: ☒ Multiple Accounts per Letter ☐ One Account per Letter  
 Print Letters for Secondary Households: ☐

Which school and period would you like to include in the report?  
 School: District (All Schools)  
 School Year: 14-15  
 Ad Hoc Filter:

Max Balance:

Eligibility: ☒ Paid ☒ Reduced ☒ Free ☒ Non-Reimb & Adult

Sort Option: ☒ Patron Name ☐ Grade & Name ☐ Homeroom Teacher  
 Account Status: ☒ Active ☐ Inactive ☐ All  
 Include End Dated Patrons: ☐

Buttons: Edit, Delete, New Letter, Print Letter

Save Copy Print Sample Back

**Letter Detail**

\*Letter Name Harrison High Low Baland \*Font Type Arial

☒ Allow Margin for Letter Head

**Letter Format**

Low / Negative Account Balance Reminder

Date: MM/DD/YYYY

Guardian Name(s)  
Address  
City, State, Zip

Dear Parent or Guardian,

The balance(s) for the following food service account(s) are:

Save Back

**Letter Detail**

\*Letter Name \*Font Type Arial

☐ Allow Margin for Letter Head

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▼ Reports

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- Audit Report
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- Item Summary
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- Patron Balance
- PIN Report
- Transaction Detail
- Transaction Summary
- Voids Report
- Balance Letter Wizard**

► Account Maintenance

**Balance Letter Wizard**

This wizard will walk you through the creation of an account balance letter format. The students basic information, account balance and mailing address will be printed automatically.

**Balance Letter Templates**

Which students would you like to include in the report?

☒ Grade All Students  
EC  
HK  
KA  
KB

☐ Ad Hoc Filter

Enrollment Effective Date 07/21/2014

Summary Date\* 07/21/2014

Sort Option ☒ Name ☐ Grade ☐ Balance ☐ Homeroom Teacher

Edit Delete

New Letter

Print Letter

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**POS Account Messenger**

POS Account Messenger sends Point of Sale account related messages to Messenger contacts for student and recipients, select an Ad Hoc filter.

The Template Name and User/Group can be changed after selecting Save or Copy.

User/Group
User

Template
<new>
Save
Copy
Delete

Enter the filter criteria for POS Account Messenger:

School
All Schools
0000 Adams Elementary ALC
988 Alternative Learning Center
555 Appleby Middle
1 Arthur Elementary
019 Buchanan Middle School
8 Carter Middle
176 Cleveland Elementary
300 Clinton Secondary
0197 Coolidge Elementary

Grade
All Grades
01
02
03
04
05
06
07
08
09

Eligibility
All Eligibilities
Paid
Reduced
Free
Non-Reimb & Adult

CTRL-click or SHIFT-click to select multiple

Balance
☒ All
☐ Range
☐ Use Account Reminder Setting

Account
☐ All
☒ Active
☐ Inactive

Ad Hoc Filter (Further narrows criteria)

Effective Date
07/22/2014

Limit delivery to contacts that speak
No Language Preference

Delivery Devices:
☒ Inbox
☒ Email
☐ Voice
☐ Text

Sender's Email: messenger.ieentropymaster@infinitecam

Message Subject

Message Body

Cutting and pasting from third party products, e.g., Microsoft Word, is not recommended.

B
I
U

Font
Size

## Terminal Maintenance

### Tool Search: Terminals

The Events column of the **Terminals** editor of Point of Sales Administration should be at or very close to 0 (zero) for all terminals on or after the last day of serving. A terminal that has events that only increase and do not reduce may indicate a terminal is no longer in use. To keep performance and messaging optimal, terminals no longer in use should be deactivated.



Name	Last IP Address	Events	Responses
AES-1		36	0
CAFETERIA SERVE		0	0
CLASS SERVE		0	0
CS-1		0	0
HHS-1		20950	0
POS-1	10.35.58.14	20951	0
SERVER		0	0
VBHS-1		0	0

Best practices for verifying that the Event column is accurate for the Point of Sale terminals:

- It is recommended that cashiers write down the name of the last student who went through their lunch line on the last day of school.
- Generate a Daily Transaction Detail Report for the last day of school and check for the name of the student who went through the lunch lines last to verify the last transaction has been posted successfully.

This report prints the daily transactions' detail information group by POS terminal.

Which date would you like to include in the report?

Date: 07/22/2014

Date Type: ☒ Transaction Date ☐ Post Date

Which POS would you like to include in the report?  
(CTRL-click or SHIFT-click for multiple selection)

- All POS Terminals
- Adams Elementary ALC
  - CAFETERIA SERVE
  - CLASS SERVE
  - SERVER
- Alternative Learning Center
  - CAFETERIA SERVE
  - CLASS SERVE
  - SERVER
- Appleby Middle

Generate Report

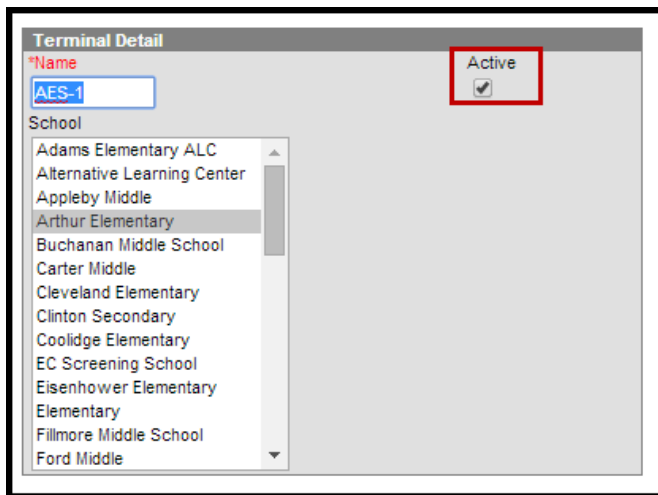
# Deactivating Terminals

Once the last successful transaction has been verified, the terminals that will not be used until the following school year can be inactivated.

This can be done by:

1. Going to **Point of Sale > Administration > Terminals**.
2. Select a Terminal; a **Terminal Detail** will appear for that terminal.
3. Unmark the **Active** check box.
4. Save.

When the next school year is about to begin, mark the terminal as Active once more and complete a POS Data Reload. For instructions on the POS Data Reload process, see the [Terminal Manager](#) page.



The screenshot shows a web form titled "Terminal Detail". At the top left, there is a field labeled "\*Name" with the value "AES-1" entered. To the right of this field is a checkbox labeled "Active" which is checked. Below the name field is a dropdown menu labeled "School" with a list of school names: Adams Elementary ALC, Alternative Learning Center, Appleby Middle, Arthur Elementary, Buchanan Middle School, Carter Middle, Cleveland Elementary, Clinton Secondary, Coolidge Elementary, EC Screening School, Eisenhower Elementary, Elementary, Fillmore Middle School, and Ford Middle. The "Active" checkbox is highlighted with a red rectangle.