



HealthOffice Recommended Year-End Process

Please keep in mind that the process may be different based upon whether the data import process is utilized.

	Description	Applicable HealthOffice Version		
		Web	Enterprise	Professional
A.	Run all year end reports	Yes	Yes	Yes
B.	Complete and store a database backup for long term storage.	No ¹	Yes	Yes
C.	Purge Damaged/Deleted Items in the Admin program.	Yes	Yes	Yes
D.	Graduate seniors to Graduated Non-Students in the Admin program.	Yes	Yes	Yes
E.	Archive the students to "Archive school" If you do not import, this is a step you can skip.	No ²	Yes	Yes
F.	Add any new schools for the next school year. Please remember to fill-in the School ID.	Yes	Yes	Yes
G.	If no import is used , then manually promote students to the next grade. If an import is used , run a data import after the completed rollover on the Student Information System for the next school year.	No ²	Yes	Yes
H.	Update User security with changes to inactive/new schools. e.g. add any new schools and authorize the users for the schools that they will be at in the new school year.	Yes	Yes	Yes
I.	Update User Security with new or changed user information.	Yes	Yes	Yes
J.	Review User Groups for any changes necessary for the new school year and for any new features added to the HealthOffice product.	Yes	Yes	Yes
K.	Set up Days Off (School Calendar)	Yes	Yes	Yes
L.	Review Healthmaster Support site for product updates. This will be done by Healthmaster for all web-enabled customers.	No ³	Yes	Yes
M.	Update system with any available immunization compliance changes. This will be done by Healthmaster for all web-enabled customers.	No ⁴	Yes	Yes
N.	Review training needs for returning and new users to the HealthOffice product.	Yes	Yes	Yes

Notes:

1. Customer data backups are managed by Healthmaster Data Center Services.
2. Customer data imports are scheduled and managed by Healthmaster Data Center Services.
3. Healthmaster Data Center Services manages all product updates.
4. Customer immunization compliance data is managed by Healthmaster Data Center Services.