



**MealManage**  
**New School Year Migration Guide**  
Version 1.0

MealManage LLC  
07/01/2023

# Introduction

This guide provides instructions for creating a new school year, moving students & balances to new year as well.

**Please note:** This guide assumes that all senior-most (highest grade) students will graduate and need not be migrated to next school year. Balances for these students can be accessed in previous year on as needed basis.

Using this guide step-by-step with complete the following tasks -

- 1) Create a new school year
- 2) Copy school settings (e.g. POS settings, Reimbursement rates) from previous school year to new school year
- 3) All students (*except senior-most grade in the school*) are moved to a new school year and all student grades are incremented to next grade
- 4) All balances for students who are migrated to new school year will be migrated as well.

**Please note:** The senior most (highest) grade students in the school and corresponding balances are not migrated.

Below are the migration steps provided in detail in following sections-

**Step 1** – Create a new school year.

**Step 2** - Roll over students to new school year

**Step 3** – Roll over the student balances

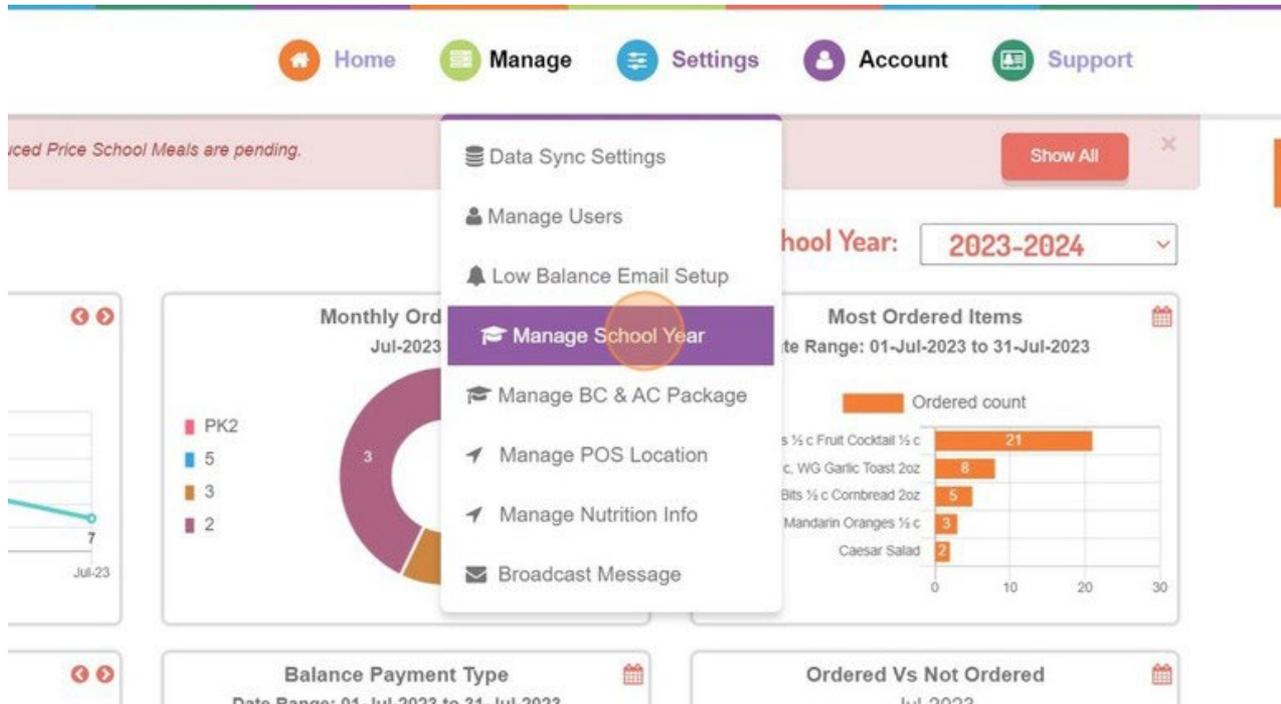
**Step 4** - Import new students

**Please note:** If you have SIS integration with MealManage only step 1 is needed. As soon as the first sync happens from SIS, all the students and balances will automatically move.

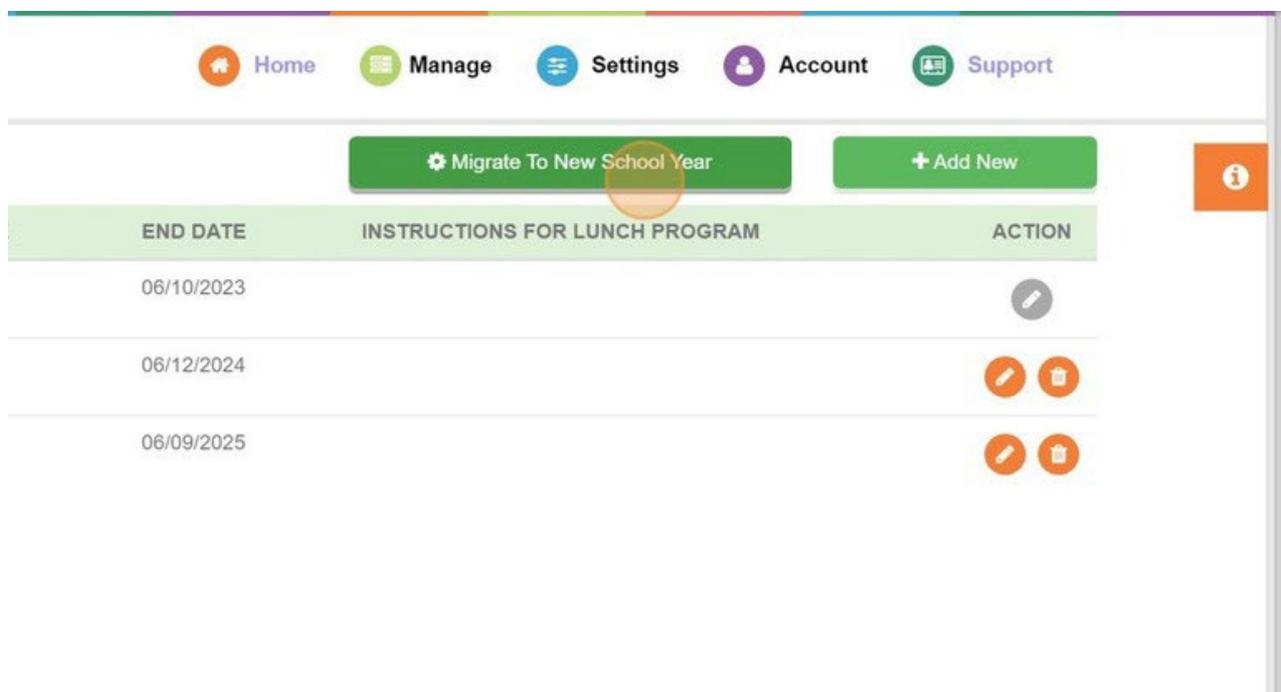
If you have any additional questions, please contact us at [support@mealmanage.com](mailto:support@mealmanage.com)

## Step 1 – Create a new school year

To create a new school year within MealManage, you will first need to log on to your admin account and go to the blue "Settings" button at the top. From there, click "Manage School Year".



Click "Migrate To New School Year" button, to start creating a new school year.



Complete the first step by filling out the start & end dates, then click "start". For **Start date field**, please follow the below guidelines -

- 1) It shouldn't overlap with the previous school year.
- 2) You must use the current date or a previous date. You cannot use a future date. Don't worry! If needed, you can go back and change the dates later so that they are accurate.

STEP 1 - ADD NEW SCHOOL YEAR

Start Date 07/11/2030 End Date 07/10/2031

Copy settings from previous school year

Start

Once you fill out your dates, click "Start" to create next school year. This will create the school year. Go to step 2.

**Please note:** If you don't have student data to migrate from previous years or if you have SIS integration with MealManage, then you are done with the migration process. Click the "Skip Step 2 & 3 and exit the Migration Flow" button.

STEP 1 - ADD NEW SCHOOL YEAR

Start Date 07/15/2026 End Date 07/02/2027

Copy settings from previous school year

Complete Skip Step 2 & 3 And Exit The Migration Flow

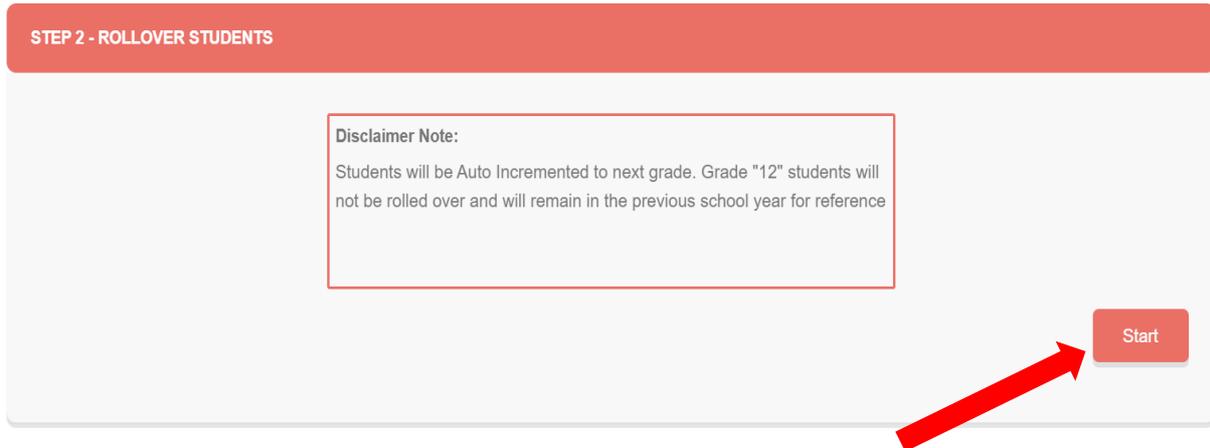
**(Please note: If you have SIS integration with MealManage only step 1 is needed. As soon as the first sync happens from SIS, all the students and balances will automatically move. Please skip next steps as indicated above.)**

## Step 2 - Migrate student data

If you want to roll over student information, proceed to the second step labelled "**Roll over students**".

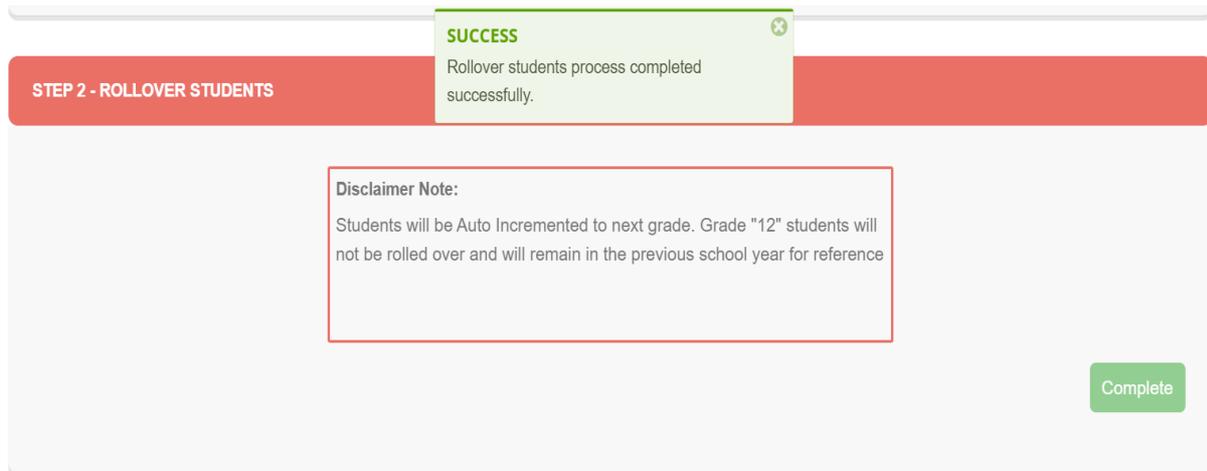
**Please note:** The senior most (highest) grade students in the school are not migrated. Also, rolled over students will be moved into next grade.

Click on the red "**Start**" button to begin.



The screenshot shows a red header bar with the text "STEP 2 - ROLLOVER STUDENTS". Below the header is a light gray area containing a red-bordered box with the following text: "Disclaimer Note: Students will be Auto Incremented to next grade. Grade "12" students will not be rolled over and will remain in the previous school year for reference". To the right of this box is a red button labeled "Start". A red arrow points from the bottom right towards the "Start" button.

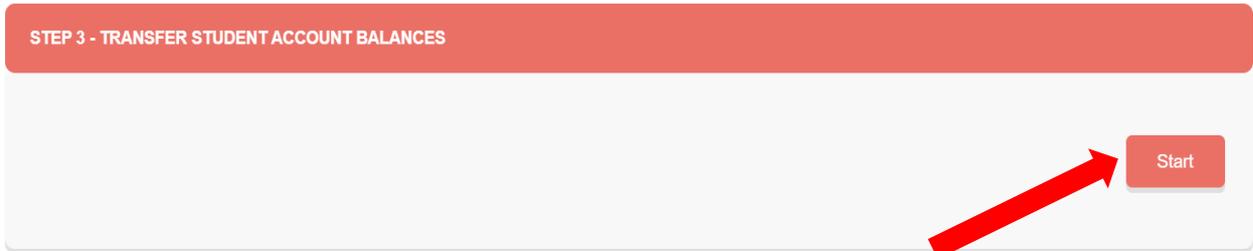
**Please note:** upon completion of the process the confirmation will be shown on the top of the page. Whole process will take only takes 20-30 seconds or less.



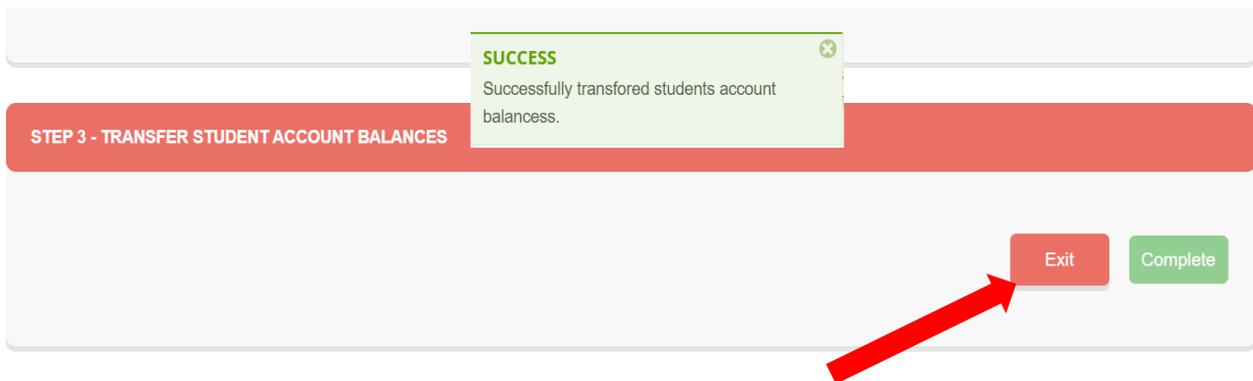
The screenshot shows the same interface as above, but with a green success message box at the top. The message box contains the text: "SUCCESS Rollover students process completed successfully." Below the message box is the same red-bordered disclaimer note box. At the bottom right of the interface is a green button labeled "Complete".

### Step 3 – Roll over student balances

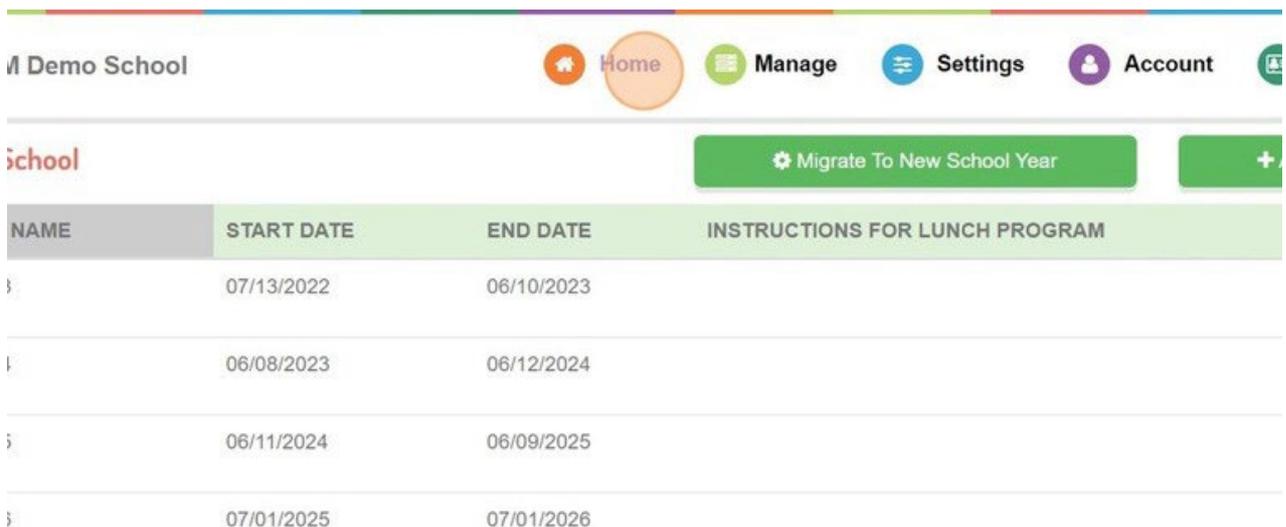
If you want to roll account balance information from previous year (Positive and Negative Balances), proceed to the step labelled "Roll Account Balances" and click on the red start button to initiate the transfer.



**Please note:** upon completion of the process the confirmation will be shown on the top of the page. Whole process will take only takes 20-30 seconds or less.



Process is complete. Click "Exit" as shown above. The system will then take you back to your home screen where you can then see the new year. Congratulations!! You have completed the New School Year migration process and can proceed to your new year.



## Step 4 – Import new students

As a final step you will need to add your new students. Please follow the guidelines provided for importing the students using the Student Import Option. Please download the latest template from Import Students Screen or contact our team if you need the student import template.

The screenshot shows the MealManage Demo School interface. At the top, there is a navigation bar with 'Home', 'Manage', 'Settings', 'Account', and 'Support' links. Below the navigation bar, the main content area is divided into two panels. The left panel, titled 'Import Students Info For: 2023-2024', contains a 'Students Info' section with instructions on how to upload an Excel file and a 'Sample file' link highlighted with a red box. Below this is an 'Upload Excel File' section with a 'Choose File' button and a 'Proceed' button. The right panel, titled 'Archive Files', features a 'Student Import' toggle switch (which is turned on) and a 'Data Sync' link. Below this is a table with columns 'DATE', 'PROCESSED BY', and 'FILE'. The table is currently empty, displaying 'No rows found'. At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and '5 rows'.

If you have any additional questions, please contact us at [support@mealmanage.com](mailto:support@mealmanage.com)

We thank you for your continued partnership with us and we look forward to working with you win the New Year!

Thank You.