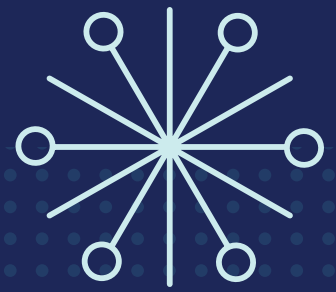


K-12 End-Of-Year Checklist

The ultimate end-of-year checklist for school administrators and directors across all departments in your district.

Explore these 8 essential tasks and tactics as you wrap up the year 2022 and prepare for winter break.



☐ Plan for expiring ingredients

Before going on winter break, be sure to make a list of foods that will be expiring over the break. Can the items be frozen or donated to a backpack program, food bank, or other community entity? Plan to reduce food waste and help others in need.

☐ Get Payroll ready for tax season

Unfortunately, the IRS runs on the calendar year – not the academic one! Before the end of the year, every district must ensure payroll and benefit deductions are in order. Verify employee data, including current addresses and payments, paychecks, signing bonuses, and overtime pay.

☐ Clean up your books

Take the time to account for all transactions, including any grants or funds received and uncleared checks and withdrawals. Review the accounts payable gaining, paying any outstanding bills, and addressing unpaid invoices due before year-end.

☐ Pre-coordinate orders and deliveries for items that will be needed when you return from break

As students return from winter break, making sure meals are planned and groceries are on order can be a huge time-saver. Coordinating ahead of time allows you and your staff to relax and enjoy the holiday.

☐ Audit your forms and make changes

Which forms in your automation flow worked well? Which didn't? Do you have any changes, or do you want to make adjustments? The New Year presents an opportunity for a fresh start. Take the time to identify and make updates to improve efficiency.

☐ Utilize technology that will make payroll a breeze

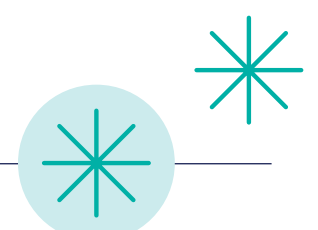
Are you missing any tax or payroll information? Tools that manage forms and workflows can help you fill in the blanks – fast. Preparing your payroll ensures you're ready to go when your staff asks about their W-2s.

☐ Remember to prepare and submit your Verification Collection Report

If you haven't already – remember to prepare and submit your FNS-742, School Food Authority Verification Collection Report. All SFAs are required to submit this to their state agency even if they are exempt from verification requirements. Don't forget – the Verification Collection Report is due by January 15!

☐ Create efficiencies tomorrow by planning your forms today

Do you have any upcoming registration events in the spring? Sports participation, field trips, or enrollment for summer camps? Take a moment to brainstorm ideas with your team and pick a handful of registration workflows you'd like to automate in the New Year.



Follow the checklist above and reach out to LINQ for more tips for a stress-free winter break!