SchoolMoney

PART OF communitybrands

End of Year User Guide

Dear Schools,

With the new school year approaching, we understand that this transition period can be a busy time for both schools and parents alike. In light of this, we have compiled a list of suggestions that we hope will make the beginning of the new term as stress free and simple as possible. If you have any questions regarding any of these items, please feel free to contact our support line; a member of our support team will be happy to help answer any questions you may have.

Please be aware that this is a comprehensive guide and we recommend you read it fully to prepare for September.

Contents

1. End of Year Checklist

We recommend running through the below checklist to ensure that you have fully prepared your **SchoolMoney** system for the new academic year. Some of these tasks can be carried out and the end of the Spring/Summer term to help you get a head start, whilst others will need to be actioned in September once the academic year has rolled over. For more information on how to compete these steps, please refer to our full **End of Year** guide.

Before September

- ☐ Do any of your leavers have credit that you need to refund/transfer to a sibling?
- ☐ Do any of your leavers have debts that you need to chase or clear?
- ☐ (If you do not use the Wonde or SIMS link) Have you sent CSV with all new pupil data?
- ☐ Have you removed any old Staff records that you will no longer need in September?
- ☐ Do you need to update your dinner menus?
- ☐ Do you need to update your bank details/BACS references?
- ☐ Have you archived any completed payments—have you removed/written off pupils from payments you are not expecting to be completed?
- ☐ Do you need any old users removing?

In September

- ☐ Have you ran your SIMS/Wonde/ Xporter link to update your pupil data?
- ☐ Do you need any new users creating?
- ☐ Have you added new Staff members onto your system?
- ☐ Have you updated your FSM entitlements?
- ☐ Have you checked that your UIFSM are showing correctly?
- ☐ Have you added your new pupils into your payments (e.g. dinners) so that they appear on the register?
- ☐ Have you added your pupils into any groups you have set up such as KS1 and KS2?
- ☐ Have you sent passwords to your new pupils?
- ☐ Have you set up new dinner/club weeks?
- ☐ Have your dinner/club costs changed?
- ☐ Have you set your payments live?
- ☐ Have you removed your Y6 from dinner registers?

2. Bank details

To add or amend bank details on SchoolMoney, you will need to contact us via email - we cannot amend any bank details over the phone. The email will need to state clearly what the bank details are for and if they are to replace old details or are to be added separately. You will need to send us a void cheque/paying in slip/bank statement/headed (signed) letter as proof of the account number and sort code. No bank details can be added or changed until we receive this in writing with proof of the account,

Please ensure that all BACS references are correct. If you need to change these, notify us via email as soon as possible to avoid any errors.

You can check your current details/BACS references in the Admin/BACS Information and Local Authority section of SchoolMoney.

3. Updating Free School Meals/UIFSM

Please check that all of your FSM entitlement dates are correct before you begin to mark in meals.

If you use the SIMS link, or the Xporter link picks this up from your MIS, then we can update your FSM automatically.

If your FSM entitlements do pull through from your MIS (e.g. You use the Wonde Sync, or CSV) then please follow the below instructions to update your FSM information:
- Click on the Admin tab
- Click on the Students icon
- This will bring up a list of all children in your school; find the child you want to add or take off FSM
- Double click on their record
- In the bottom left hand corner of the page there is a FSM tickbox

- <u>If FSM needs to be added</u>: click the checkbox next to FSM and then click on the Entitlement Starts and Entitlement Ends buttons to bring up a mini calendar to add the dates
- <u>If FSM dates need to be amended</u>: click on the Entitlement Starts and Entitlement Ends buttons next to free school meals to bring up a mini calendar to alter the dates
- <u>If FSM need to be removed</u>: simply untick the box.

For your Universal Infant Free School Meals (UIFSM), this should already be pre-set for you as it is based on the year groups. However, it is a good idea to check this is still set up correctly:
- Click into the Admin tab
- Choose Universal Infant Free School Meals
- Ensure the correct groups are ticket (commonly Reception, Year 1 and Year 2) and press Save.

If you have marked in your meals and then realise that you need to update your FSM/UIFSM entitlement then you will need to backdate the meals.
- Change your FSM/UIFSM entitlement
- Go to the register/Cashless Catering and remove the relevant meals
- Save the register/checkout on the cashless
- Go back into the register/cashless and readd the meals - they should now be correct. If they are not, please check the entitlement dates in the FSM report.

4. Updating pupil information

Please note: if you're switching MIS you need to let us know as soon as possible as you will need to provide us with an updated CSV file that we can import. This is to prevent any duplicate or incorrect data when importing from your new MIS.

4.1 Management Information System - SIMS

Please note: if you have the SIMS auto run setup on your computer then you do not have to do anything, it will automatically run the link as soon as you start your computer.

Once you have added your new intake or updated all the pupils' year groups into SIMS you will need to run the SIMS link, which can be found on your desktop as SIMS link v44 (icon of a cog/wheel) to bring this information across to SchoolMoney. This will then automatically mark all the Reception, Year 1 and Year 2 students as Universal Infant Free and therefore they will not be charged for having a meal.

If you are unable to locate the SIMS link on your desktop or need the updated v44, follow the following steps to run the link through Teachers2Parents:
- Login to Teachers2Parents
- Click on the Text Message service
- Click on the Admin link in the top right hand corner
- Click on the Setup SIMS tab - second from the right
- Click on the SIMS link v44
- When prompted, click on run/install
- Type in your Teachers2Parents username and password
- Type in your SIMS password
- Import completed

Please note: new starters will need to be added to any pre-set up payments for the new term. **They will not automatically be added into payments.**

4.2 Schools that are centrally hosted using the V12 link

Once you have added your new intake or updated all the pupils' year groups into SIMS, you will need to follow the below steps to import all the updated information across to SchoolMoney. This will then automatically mark all the Reception, Year 1 and Year 2 students as Universal Infant Free and therefore will not be charged for having a meal.

- Please ensure the T2P Central Link 'Settings' box is open - if not, double click the t2p1_central_v12 icon on your desktop to open it
- In SIMS: click on Reports and then Run Reports
- Open Focus then Student and double click the report 'A_T2P_Central_v11'
- Wait a moment, and a 'Report has been created' message will appear
- Wait again, and another window will appear saying 'opening file...'. It will run through a few lines of text as it updates, before closing down - this window might run behind SIMS. If it does, the Central link tab at the bottom of the screen will flash to indicate it's updating
- It will take a few seconds to finish updating. Then click Ok on the 'Report has been created' message.

Please note: new starters will need to be added to any pre-set up payments for the new term. They will not automatically be added into payments.

4.3 Schools not using SIMS - Wonde

If you use a MIS that isn't SIMS and you already have the Wonde link set up, you will need to run this to update your information.
- Login to Teachers2Parents
- Click on the Text Message service icon
- Click on the Admin icon in the top right hand corner
- Click on the Wonde tab
- Select the 'Import Student Details' button in the bottom right hand corner
- Import completed

If you do not have the Wonde link set up but would like this to be implemented, please contact our support team and we can talk you through the set up.

Please note: new starters will need to be added to any pre-set up payments for the new term. **They will not automatically be added into payments.**

4.4 Schools using Xporter

If you have been set up with Xporter then you will not need to take any action; the Xporter link automatically runs overnight to keep your SchoolMoney data up to date with the information in your MIS system.

You can also run a manual update if necessary. To do this, click on the Admin tab within SchoolMoney, scroll down and click on the Xporter icon. Then press the Sync Now button on the left hand side.

4.5 Schools not using SIMS or the Wonde link

If you use any other MIS system and you do not want/cannot use the Wonde or Xporter link, then you will need to send us an updated CSV file. Please ensure we receive this before the start of the school term, so that you can use the system immediately. The CSV will need to hold the following information in the given order:

- Year group
- Admission Number OR UPN
- Forename
- Surname
- Mobile Number
- Priority (must always be 1)
- Email Address
- Form Group
- Gender

Please send your CSV as soon as possible with the above information at your earliest convenience before the school term starts by submitting a support ticket. Please make sure it is formatted correctly and only has one set of contact details per child.

Please note: new starters will need to be added to any pre-set up payments for the new term. **They will not automatically be added into payments.**

5. Archiving completed payments

Please note: due to the change in Academic Year, your main payments page will revert to showing payments for the current year. To change this and see your previous payments you can change the filter at the top of the payments page to 'All.'

Payments that have been cleared and have no outstanding balances can be archived. To do this, follow the below steps:
- Click on the Payments tab
- To archive a single payment: highlight the payment you wish to archive so the entire line is grey
- In the bottom left hand corner, click on the drop-down menu
- Select the Archive/Unarchive option and the payment will be moved
- If you want to archive all available payments then all you need is to select 'Archive All' and it will move all payments with a zero balance

The payments that have been archived will always be available to view, click on the Show Archived Payments tickbox in the bottom left hand corner to view them.

If any payments still have outstanding balances you would need to clear this completely before the payment can be archived. You can do this by writing off the debt or collecting any outstanding funds from the parents.

6. Adding and removing staff

To **add** a staff member follow the below steps:
- Click on the Admin tab
- Click on the Staff Members icon. This will bring up a list of your staff
- Select Add in the bottom right hand corner
- Complete staff Forename, Surname, Mobile number and Email address
- Change Year Group and Form to Staff
- Save in the bottom right hand corner
- They are now available to be added into payments on the system.

To **remove** a staff member follow the below steps:
- Click on the Admin tab
- Click on the Staff Members icon. This will bring up a list of your staff
- Find the staff member and double click into their record
- In the top section of the screen, tick the Off Roll box
- Press Save in the bottom right hand corner
- The staff member has now been removed.

7. Dinner Money

7.1 Creating the weekly payment

To create a new Dinner Payment follow the steps below:
- Click on the Dinner Register tab
- The second drop-down below the Register tab should have School Lunches/Dinners selected if marking student register or Staff Lunches/Dinners if marking staff register
- Select the date for when you would like to mark the register - you can choose a future or past date if necessary
- Click Save in the bottom right hand corner to save a blank register, alternatively mark the register and then save
- Once the register is saved, a payment will have automatically been created. Press F5 to see this listed in your payments tab.

Please note: new starters will need to be added to any new payments and any pupils that have left will need to be removed. You will also need to update your current students in your MIS so that their year groups show correctly on their register. **Students will not automatically be added or removed from the payments.**

Please note: if your week is less than five days long for any reason (bank holidays etc) please ensure that you set up the payment for the whole week, and then mark any holidays on the register. You can do this by making sure that the filter is set to All at the top of the screen and then selecting the day drop-down box in the grey bar at the top of the register and marking as 'Holiday,' 'Inset Day' or 'School Trip.'

Please make sure that if you are pre-booking, your weeks are set up in advance of September so parents can make their meal choices before term starts.

7.2 Setting payments live

Once you have set up the relevant weeks (either for the half term or just the first week needed) you will need to turn the payments live. This is so that your parents will be able to pre-book their dinners (if you allow them this facility), and/or pay off their arrears as they accumulate. If you do not turn the payments live you may find money is not allocated correctly.

- Go to the Payments tab
- Click on the week you would like set live so that it turns grey
- In the bottom left hand corner, select the drop-down menu
- Click on Set Online/Offline
- It will pop up with a box asking if you are sure you want to turn the payment live - press Ok
- This will turn the payment live. Repeat on further weeks as needed

7.3 Changing costs

If your dinner costs have increased for the new term, you will need to change them on SchoolMoney so that when your meals are marked, the costs they generate are correct.

Register costs

- **Make sure that you have the first week in which the cost has changed set up beforehand**
- Go to Admin
- Scroll down and select Manage Dinner Payments
- In the list of weeks that pop up, select the week you want to change so that it highlights in grey
- Click Update Amounts in the bottom left hand corner
- In the box that pops up, amend your daily cost
- Select Save

- Any weeks that you set up going forward will have the new cost. **If you have multiple weeks set up in advance, you will need to change the cost for all of these weeks in this section.**

Cashless Catering

If you use our Cashless Catering module, you will need to follow the previous steps to change the register cost and you will need to amend your dinner item costs.
- Go to Admin
- Scroll down and select the Dinner Items icon
- Find the item you want to amend and double click into it
- This will open the item information into a box. Amend the cost in the box available and Save
- Repeat on further dinner items as necessary.

Dinner Top Up

If you are not a pre-booking school, you may want to change your Dinner Top Up to reflect your weekly cost.
- Go to Admin
- Select the Parent Options icon
- In the box labelled Default Dinner Top Up Amount, overtype to old cost with the new one
- Press the Save button

7.4 New menus

If you use our Cashless Catering feature, you may need to change your menus for the new term. You can do this in Admin/Dinner Items.

To delete items:
- Go to the Admin tab
- Scroll down to the bottom of the screen and select Dinner Items
- Click on the first item you want to delete so it highlights in grey
- In the bottom left hand corner, select Un/Delete
- Repeat until all needed items are removed.

To add a new dinner item:
- Click on the Admin tab
- Scroll down to the bottom of the screen and select Dinner Items
- In the bottom right hand corner select the Add button
- A box will pop up which will have all the item options; you will need to add the name of the item, how much it costs, what menu it's for, who it is for and the days of the week it is available on
- When you have filled out the item, save
- Then click on Add again and repeat the process for the next item

For a more comprehensive look at adding a dinner item, please see the Admin Guide. If you prefer, you can also use our new Dinner Menu Import facility to update your menus.

You will either need to delete your old menus using the steps above or assign your new items to the next available menu slots in the system.

To download the spreadsheet, click into the Admin tab and click on Import Dinner Menu, then Download file template at the top right corner. When completing the spreadsheet, please note that the item names should be 50 characters or less, and commas should not be used. Please also do not include £ or P signs in the cost column.

Once complete, click on the Choose File button at the top left, and find your CSV. Click on validate to check for any errors, and finally click on import button under step 3.

If you run into any difficulty importing your dinner menus, please send your menus to us by submitting a support ticket and we will complete the import for you.

8. Clubs

8.1 Creating the weekly payment

To create a new Club Payment follow the below steps:
- Click on the Club Register tab
- In the first drop-down box, choose the club you want to create
- Select the date for when you would like to mark the register - you can choose a future or past date if necessary
- Click Save in the bottom right hand corner to save a blank register, alternatively mark the register and then save
- Once the register is saved, a payment will have automatically been created. Press F5 to see this listed in your Payments tab.

Please note: new starters will need to be added to any new payments and any pupils that have left will need to be removed. You will also need to update your current students in your MIS system so that their year groups show correctly on the register. **Students will not automatically be added or removed from the payments.**

Please note: if your week is less than five days long for any reason (bank holidays etc.) please ensure that you set up the payment for the whole week and then mark any holidays on the register. You can do this by making sure that the filter is set to All at the top of the screen and then selecting the day drop-down box in the grey bar at the top of the register and marking as 'Holiday,' 'Inset Day,' or 'School Trip.'

Please make sure that if you are pre-booking, your weeks are set up in advance of September so parents can make their meal choices before term starts.

8.2 Setting payments live

Once you have set up the relevant weeks, either for the half term or just the first week needed, you will need to turn the payments live. This is so that your parents will be able to pre-book their session (if you allow them this facility) and/or pay off their arrears as they accumulate. If you do not turn the payments live you may find money is not allocated correctly.

- Go to the Payments tab
- Click on the week you would like to set live so that it turns grey
- In the bottom left hand corner, select the drop-down menu
- Click on Set Online/Offline
- It will pop up with a box asking if you are sure you want to turn the payment live. Press Ok
- This will turn the payment live. Repeat on further weeks as needed.

8.3 Changing costs

If your club costs have increased for the new term, you will need to change them on SchoolMoney so that when your sessions are marked/booked, the costs they generate are correct.

- Make sure that your first week is set up before you change any costs
- Go to Payments
- Find the week of the club and double click into the payment
- In the top section click on the Configure Durations button
- A box will pop up with your current costs
- Amend the number of durations and cost amounts as necessary
- Press Save in the box
- Press Save in the bottom right hand corner of the payment
- When you set up future weeks the costs will roll over. **If you have already set up multiple weeks in advance, you will need to amend the costs in these future payments.**

9. New pupils

Any new pupils that start your school will be added to SchoolMoney through the steps in section 4. While they will be on SchoolMoney **they will not be added into payments automatically.**

If you want these new pupils to appear on the Club/Dinner registers, you will need to add them manually:
- You need to make sure you have one week of Clubs/Dinners set up in advance
- Go to the Payments tab
- Find the week you want to add them into and double click into the payment
- This will open your payment. At the bottom of the screen, select the Manage Students button
- A box will pop up with the students not currently added into the payment on the left and the pupils already in the payment on the right
- Select Add All at the top or go through the list and add them one by one
- Save the payment in the bottom left hand corner
- **If you have set up multiple weeks in advance, you will need to add the new children to all future payments.**

9.1 Adding new pupils into groups

Any groups you have set up on SchoolMoney have to be manually created and so when new pupils start your school you have to manually update these groups.
- Go to Admin
- Click on the Groups icon
- From the list on the left, choose the group you want to amend and double click into it
- A box will pop up. Find the children you want to add from the left and select the Add link next to their name to move them to the right
- Press Save Group, and repeat on further groups as necessary.

10. Old pupils

Once you have updated your SchoolMoney system either with your link or a CSV, any children that have left the school will be automatically removed if they do not have anything outstanding on the system. If they have not been removed it may be because they have outstanding debt they need to clear.

If you want to remove any children manually, follow the below steps:
- Click on the Admin tab
- Click on the Students icon. This will bring up a list of all children in your school
- Find the relevant child and double click into their record
- In the top section, select the Off Roll tickbox
- Press Save in the bottom right hand corner
- The child has now been removed.

If you need to see the account of an off-roll pupil either because you want to see their record or because they have been off-rolled and still have credit/arrears, you will need to bring them back on roll.
- Click on the Admin tab
- Click on the Students icon
- In the top left, change the admission status to Off Roll. This will bring up all students, including your old ones highlighted in orange
- Find the relevant child and double click into their record
- In the top section, change the admission status to On Roll
- Press Save in the bottom right hand corner
- Press F5 on your keyboard to refresh the system and see the child's record.

11. Arrears and credits

We advise that you check any pupils for credits and arrears before they are off-rolled on SchoolMoney.

Arrears - if anyone has debt, then the debt will appear on the system until it has been cleared. It's up to you whether you would still like to chase the arrears or write off the debt through Cashier.

Credits - if any of your leavers have credit, then you can either refund this to the parent or transfer it to a sibling; this can be done from the Cashier tab. Any credits from current students will roll over to next year; you do not need to refund the parents.

11.1 Arrears report

When the academic year rolls over so will all of your reports, meaning that when you look in your Money Overdue, Dinner Arrears or Club Arrears reports they will not show last year's arrears automatically.

If you want to see your previous arrears, you need to filter the report to show Parent Paid On - All instead of showing the last seven days of the current academic year.

11.2 Credit report

For a list of all credits on the SchoolMoney system, you can look into the Credit Report. This can be found under Reports/Analysis. It will list all students who have credit on the system and what the credit is for. All credits roll over for all children and can be used on future payments even if they were paid the previous term.

In this report you can also include off-roll pupils so you can see if there are any past children that need refunds.

11.3 Arrears report

At the end of the year, you may be left with arrears on leavers' accounts which will prevent them from being off-rolled. If this is the case, you have two choices:

- Chase the parents for the money and leave the child on the system until it has been paid off
- Write off the arrears so that they clear immediately and you can off-roll the child.

To write off any arrears follow the below steps:

- Click on the Cashier tab
- Top left below the tabs where it says Type Student Here... start entering the child's first name or surname and then click on the name when you see it in the drop-down
- Any outstanding payments will be shown on the left side of your screen - if not shown, please ensure the show unpaid/uncollected items drop-down is selected
- Click on the payment you would like to write off from the left side of your screen; this will bring up the manage payments screen on the right side of the screen
- Click on the unpaid or partially paid status and select Write Off
- Confirm the amount you would like to write off along with the reason
- Select the Write Off button. The payment will now be written off and available to view in the Write Off report.

11.4 Returning credit

If a Leaver has been left with credit, we would advise either giving the parent the money back via a refund or transferring the credit to a younger sibling to use on SchoolMoney.

Refunds

- Click on the Cashier tab
- Top left below the tabs where it says Type Student Here... start entering the child's first name or surname, and then click on the name when you see it in the drop-down
- Any credit will be shown in the top right hand corner Parent in Credit by: £0.00 (above the manage payment window)
- Click on the credit figure to bring up the Manage Credits window
- Select the credit that you would like to refund so that it highlights in grey and then click on the refund button
- Another window will pop up where you can type in any details for your refund and the method you would like to use (Cash/Cheque/Online) and click Ok
- If you have chosen Online Refund, the money will be sent back to the parent within 5 working days. If you have chosen Cash/Cheque refund, you will need to provide the parent with the money back yourselves.

Transferring credit to sibling

- Click on the Cashier tab
- Top left below the tabs where it says Type Student Here... start entering the child's first name or surname and then click on the name when you see it in the drop-down
- Any credit will be shown in the top right hand corner Parent in Credit by: £0.00 (above the manage payment window)
- Click on the credit figure to bring up the Manage Credits window
- Select the credit that you would like to transfer to sibling so it is highlighted in grey, and then click on the Transfer Credit to Sibling button
- It will bring up a pop up window where you can select the name of the sibling and enter the amount you would like to transfer. Click Ok.

12. Sending messages

When you have updated your student list, you might want to send a welcome message to your new pupils so that the parents have the passwords they need for SchoolMoney.

To do this:
- Go to Admin
- Click on the Students icon
- On the left hand side, tick the boxes of the students that you want to send the messages to - you can filter by year group at the top and Select All if you wish to
- In the bottom left hand corner, select the Action drop-down menu
- Choose Send Password Messages
- A box will pop up with your welcome message. You can change the wording of this message as necessary.

13. Parent login issues

Once you have sent the parents passwords, you may find that you are contacted by a few parents who say that they cannot log into SchoolMoney, Usually when this happens, it is because they are receiving the message Invalid Login Details.

If this is the case, we would advise that you follow the below steps:
- Make sure that the parents are selecting the SchoolMoney Parent Login option when signing in. If they are being asked for a username and password, they have selected the incorrect login option
- Check that the mobile number and email address you have in SchoolMoney Admin/Students is the same as what they are putting in. We advise that you check our system, not just your MIS, as they could be different. Make sure that you double check the spelling of the email and watch out for duplicate letters.
- Resend the password to the parent and advise them that it needs to be

entered exactly how you have sent it, all in lowercase. Some phone/devices can automatically capitalise the first letter in a new box, so advise the parents to watch out for this. If they have reset their password, send them the reset link again and ask them to write down the password so that they remember it

- Make sure they are entering their child's first name only exactly as it is entered in SchoolMoney

- If they are still struggling, get them into the office and do it alongside them. This way, you can see if they are entering anything incorrectly

- Make sure that the parent isn't autocompleting any of the details. The parent needs to type in all details from scratch

- Ask the parent to clear their history/cache from the device they are using (if they search how to do this on the internet it will give them instructions for their device/browser)

- Ask the parent to try a different device/browser

- Make sure that the parent isn't keeping the website up in the background on their phone. Advise them to close all browsers/apps/webpages that are open and make sure they are going through the website fresh each time instead of just selecting a page that is already open

- If the parent is getting a different error message or they are still struggling after going through the above steps, please get them to screenshot the login page and send it across to us by submitting a support ticket.

14. Setting up new users

If you have new staff members that will need access to SchoolMoney, please contact support and we will set up logins for them. This must be done from our side so please let us know in advance if you need new details.

15. Contact details

If you have any questions or require further assistance, please get in touch with us and we will be more than happy to help. Submit a ticket through our website or call **02072378456**.