Importing & New Admissions

New student intake 2024/25

It is possible to set up your new student accounts prior to them becoming active and on roll in the school's MIS database - or if the school has no automated sync, before they start in September. This allows for usernames and passwords to be provided to the new parents in order for purchases to be made for items, food and drink before the new term begins. There are two ways to set up new accounts.

For schools with an automated synchronisation tool in place (via Xporter or Wonde):

Pre-Admission token for Xporter

If on SIMS or Progresso, a Pre-Ad token is available for £95+VAT per year. This brings across all 'accepted' students, and places students into a year group - 2024/25 (for this year) and Pre-Ad Class 7/8/9/12 etc. Only available with Xporter. If on SIMS or Progresso with Wonde, a template is required.

Pre-Admission template completion*

where the Pre-Admission token is not available

For schools using Wonde as a synchronisation tool on any database, schools using Xporter using RM G2 Integris, CMIS Bromcom etc. (i.e. not SIMS or Progresso).

For schools with no automated synchronisation tool in place:

- New student import where no automated synchronisation is in place - template required £150+VAT
- Incrementing students where no automated synchronisation is in place - template required £45+VAT

Completing the template

- Template should be completed in full (or as much as possible) as this information creates a WisePay profile.
- Column A is the most important one, as all the synchronisation of data stems from the MIS ID. If that information is omitted or incorrect, you will get duplicated accounts when the students go live, and the synchronisation tool picks up the information.
- Please ensure that email addresses where possible as these will not update when the student becomes live as this information is only uploaded on the initial creation of the student's profile. Information added subsequently will need to be pulled through to WisePay via an email sweep, which would need to be requested from support. Please note that email sweeps will only bring across information where the field in the student profile is blank or it states 'not given.'
- Once completed, the template must be uploaded to the secure area on the dashboard, and we must be advised when you have done it so that we can let the technical team know it's there for it to be processed.
- When it's been actioned, we will let you know - we do state that the work will be completed in 5 working days, but it's usually quicker than that.
- We ask that all the new students are uploaded at the same time. We do appreciate this is not always possible, but please avoid submitting numerous templates.
- The cost of the templates and Pre-Ad tokens will be invoiced towards the end of the academic year.

Please note that the cost of processing the Pre-Admissions template is £150+VAT.

wisepay-software.com

How Pre-Admission students are displayed on WisePay

In WisePay, they will show as 'Year Group 2024/25' (this year) in 'Manage Account Profiles.' Class Pre-Ad 7/8/9/12 etc.

What happens when the students go live and on roll in the MIS database

- For schools with the automated sync tool, in the MIS database there will be a date set for when the 'accepted' or new students will go live and on roll. This date is usually set for end of August/beginning of September.
- Once live, the sync tool will sweep across the MIS IDs in the school's database and amend all the corresponding accounts in WisePay (this is why the MIS ID MUST be correct) and it will place the new students into their correct year and class groups. The automated sync will not change the usernames and passwords, so all the login information provided to parents will be unchanged.

Issues of usernames and passwords to parents

- Usernames and passwords can be advised to parents via the Communications Hub either in letter form or the information can be converted to Excel and a mail merge completed.
- Go into the Communications Hub, select the username and password tab. In the filter, select the year group you're looking for, i.e. 2024/25. Click on download or export.
- If you are a school that has no automated synchronisation and an import template has been submitted, in order to find your new students easily you could create a distribution list via the Communications Hub rather than clicking on Year Group 2024/25 (as your new students will have been imported into a specific year group), and you can then select the distribution group and either download the letters in Word or export to Excel for a mail merge.

Food and drink top-ups for Pre-Admissions students

- For secondary schools with Cashless Catering - if a parent tops up their child's account whilst the status is still showing as Pre-Admission, normally that payment will be held as pending and ID check before being sent to the tills.
- Payments can be found in the Food and drink module under the Pre Payment tab.
- Schools need to check the ID number showing in the student ID field - this must match the ID number used by the tills. If it matches, tick the box on the right hand side and click the button at the bottom of the screen to send to the tills.
- If the IDs don't match, a support case will need to be raised giving WisePay the details of the students whose ID the tills have, so we can investigate.

Leavers process

- When students leave the school, they should be marked as Leavers in the school's MIS database.
- Sync tool with Xporter will then mark the students and staff members as disabled in WisePay.
- The school then needs to complete the Leavers process by accessing the disabled account profiles and click the leaver box. Then, scroll to the bottom and click the large grey button to archive the accounts, which puts them into year group 50 and class of 2024 (changes each year).
- If schools are using Wonde synchronisation (or you have no automated sync) - need to mark as Leavers from live active accounts in Manage Account Profile, using the same process as above.
- Archiving the accounts removes the ex-students and staff, and it means that they will no longer appear in active reporting.