

# Arbor September Readiness Checklist

Tick off each completed step with the assistance of our web-based guides

## ○ Entering new parent / staff details on Arbor

Follow the web guide to assist you with entering members contact details to be successfully imported into Schoolcomms.

Parental Responsibility needs to be applied in your MIS for parents to be able to give consent, view and make bookings and payments on School Gateway.

To review and identify any gaps in data currently imported into your Schoolcomms account, check your registered users Management Report.

## ○ Pre-admissions

Currently it isn't possible to import pre-admissions for non-SIMS MIS systems.

Any new starters will import across to Schoolcomms once they are on roll (date of admission).

## ○ Import Settings

To check the data, you are currently importing from Arbor review your current import settings in Schoolcomms via: **Dashboard > Import Management > Edit Settings**.

Any new starters will import across to Schoolcomms once they are on roll (date of admission).

## Data Issues

Ensure that your data issues are dealt with on a regular basis; if ignored, you may not be communicating to all imported contacts.

Check your data issues via: Dashboard > Management Reports > Import Data Issues.

## Manage Schoolcomms user accounts

Your school multi-user administrators can create, unlock, amend, and delete staff Schoolcomms user accounts.

## Leavers

Please ensure you review the pupils balances and action any required manual transactions / refunds before marking them as leavers and running the import in Schoolcomms, as once the import has been run in your MIS the linked contacts and their connecting School Gateway account will be removed.

You will also no longer be able to send messages to them and any association with your school will be removed from their School Gateway account.

**Please note:** When deleting your leavers from Schoolcomms, this is a permanent deletion; only complete once you are certain you no longer need to access any related information or communicate through Schoolcomms.

School leavers need to be given a leaving date (employment end date for staff members) and once the leaving date has passed, they will be taken off roll. Once they are leavers, they can be permanently deleted from Schoolcomms.

## Leavers in Meal Manager (Cypad)

In order for them to no longer be passed to Cypad (at which point they should change to **Closed** on Cypad and **Anonymised**), you will need to follow the [Delete Leavers](#) process in Schoolcomms.

## Adding/amending Bank Details

As part of our improving security standards, schools will be asked for proof of ownership when adding new bank accounts to Schoolcomms. Proof of account will need to be sent to [banking@parentpay.com](mailto:banking@parentpay.com)

## Payments

Amend existing or create new payment requests for the new academic year.

Add any new starters to existing relevant payment requests.

**Please Note:** Schoolcomms recommends that a new payment request is created if a vast sum of monies has been collected to prevent time-outs.

## Refunds

You will need to apply refunds for leavers with a credit balance before they are deleted as leavers in Schoolcomms. Alternatively, if they have a sibling at the school, you could transfer the credit to them in Schoolcomms via manual transactions.

## Text Credits

Top up text credits to ensure you have enough for the new academic year.

## Space Usage

To ensure you have enough space to send messages, archive messages and clean up the inbox.

## Schoolcomms Dinners

Amend existing or create new Dinner Plans for the New Academic year.

Add new students to the Dinner Plan and connecting payment request once they have been imported after they have reached date of admission in your MIS.

UIFSM year groups will not be updated until the first import is run following your Academic promotion being completed in your MIS.

We would advise that you do not allow parents to pre-book meals in the Summer.

## Meal Manager

To ensure that UIFSM meals are charged correctly on your first day of term, run an import in Schoolcomms before 11am so that the updated year groups will be passed to Cypad.

Depending on when the first import in the new academic year is run in Schoolcomms, pupils and class groups will update in Cypad after the next data sync:

**School members – 6am, 11am, 3pm, and 6pm each day.**

The status of leavers will change to Closed and they will be anonymised on the next Cypad sync.

Once they have been deleted from Schoolcomms; they will then no longer appear on the Whiteboard.

## Clubs

Amend existing or create new clubs and connecting payment requests. Add new students to clubs and Payment requests once they have been imported after they have reached date of admission in your MIS.

## School Gateway

Encourage your new and existing parents to register for School Gateway. Useful letter templates can be found in the School Gateway Success Guide.

There are also useful App/Payments invite templates within Messaging.

Please remind parents to ensure they are on the most recent version of School Gateway for the best user experience. They can check for updates via their respective app store.