SIMS September Readiness Checklist

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

⭘ Check the connection between Schoolcomms and SIMS

If there have been any SIMS upgrades, please check that the connection between SIMS and Schoolcomms is still working.

Test this by running the Schoolcomms import and checking your data issues.

If your Schoolcomms import fails or if the Run Import button is greyed out, it indicates that Schoolcomms is unable to connect to your SIMS database.

⭘ Import Settings

Your import settings determine the contacts and data that are imported from your SIM database.

To review your Schoolcomms Import Settings go to **Schoolcomms desktop > Management > Import Management > Edit settings.**

⭘ Entering new parent / staff details on SIMS

For members contact details to be successfully imported into Schoolcomms, there are certain guidelines which need to be followed.

Parental Responsibility needs to be applied in SIMS for parents to be able to give consent, view online reporting information, see balances, and make bookings on School Gateway

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Pre-admissions

When your pre-admissions have been entered in SIMS, they can be imported into Schoolcomms (we import pre-admissions with the status **Applied**, **Offered**, **Accepted**, **Admitted**, and **Reserved**).

Once the admission date on the intake group is reached, they will be admitted.

Please remember to update the status of any pre-admissions who are not admitted to the school to the status **Rejected** or **Withdrawal** to ensure they are no longer imported into Schoolcomms.

New year groups for students

The academic promotion routine in SIMS will automatically increment students' year groups once you have reached the start of term date, which will be updated in Schoolcomms after the import is run.

If you experience issues in September with class groups being incorrect, you may need to Validate Memberships in SIMS.

We would advise you to contact SIMS Support before running the Validate Memberships routine to confirm that there are no implications of doing so.

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.

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Leavers

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.

Once students are identified as leavers in Schoolcomms, they can still be messaged as normal, however they will no longer show in their MIS groups. We would recommend that you manually create a **Leavers Group** in Schoolcomms to continue to message them in bulk **before** they are deleted as leavers.

Once your academic promotion has been run in SIMS, any student self-contacts (i.e. the contact details held in **section 4** of their SIMS record) for leavers from the previous academic year will be **removed from Schoolcomms** as SIMS will no longer provide us with this data. **Any parental contact details (from section 5) will remain in Schoolcomms as normal**.

Please ensure that if you need to contact students directly, that this is completed before your academic promotion is run in SIMS. Otherwise, you will need to manually re-add your student self-contacts to message them.

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

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-out

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.

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.

Schoolcomms Dinners

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

Dinner bookings on School Gateway **cannot** be made for pre-admissions. They can be added to the dinner plan and the school can make bookings on their behalf.

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.

Pre-admission students will show in Cypad however parents will not be able to book through School Gateway until the pupil is admitted. The school can manually apply pre-orders for any new starters until they are admitted.

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.

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.

Apply the new academic year timetable in SIMS

Please note, if you have Timetables switched "on" in Online Reporting and you have already applied your timetables in SIMS, there is a chance that the timetables for the new academic year will show in School Gateway as this academic year ends.

If you do not want the new timetables to be displayed to users before September, either do not apply the curriculum timetables in SIMS until September or switch off the timetable view in Online Reporting until the new term starts.

Please note: You may need to change your import settings to import 'all groups' to ensure that parents can view the Timetable.

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.

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