ParentPay eLearning courses

Version 3.0

ParentPay

Contents

ParentPay – eLearning course suite

The Academy is the home of training at ParentPay where an array of complementary and additional paid for training. eLearning can be found in the Academy which is the home of training at ParentPay.

How to enrol

If you don't currently have access to our portal, you can self-register. Click HERE to find out how.

Learners can self-enrol on courses that are in the catalogue. Courses that are not catalogued can be accessed via the relevant onboarding team.

To find out more about the portal click HERE.

Catalogued Courses

Welcome to the ParentPay Group Learning Portal

Who is it for: All users of the ParentPay academy

Objectives By the end of the course you will be able to access the ParentPay catalogue of courses available.

Description
Whether you're new to ParentPay or simply new to the role and ParentPay is already up and running, this course is designed to help you familiarise yourself with the eLearning platform and help you explore what courses are on offer.

ParentPay

ParentPay Back to School

Who is it for: School Administrators

Objectives
By the end of the course you will be able to:
- Run pupil uploads
- Add a new manager
- Send activation codes
- Promote ParentPay to parents
- Increase activation rates

Description
This course is designed to assist people return to school and starting a new academic year.

ParentPay Clubs

Who is it for: School Administrators and Club leaders

Objectives
This course will enable you to:
- Create a club, add sessions an configure club settings
- Get payments and enter opening balances
- Book a session as a payer or a manager
- Change, cancel and review who have booked onto sessions
- Add a late charge or credit
- Record payments by Childcare vouchers
- Mark attendance and run reports

Description
This course introduces the club's feature launched in 2023 to work with ParentPay. It explores what the club's feature can do and how you might typically set these up.

It looks at the basics of building a club and supports you with the day-to-day running of a club, whether that be an enrichment club or a session booking club.

It also covers how to book a club, how to manage the club on a daily basis and finally what reporting you can access to help you.

ParentPay End of Year

Who is it for: School Administrators

Objectives: By the end of this course you will be able to:

- Set term dates including half term holidays & training/inset days
- Add contact details
- Change meal prices including FSM allowances
- Refund leavers
- Send debt letters

Description
This course is designed to assist you in preparing your ParentPay site ready for the new academic year.

Towards the end of the current academic year we will add next year's calendar template for you to complete with your new term dates.

ParentPay Communication Centre

Who is it for: School Administrators

Objectives

By the end of the course you will be able to:

- Sendi activation letters/emails
- Add additional accounts and sending activation letters/emails
- Send a letter/email to non-activated payers
- Send debt letters/emails
- Create PayPoint letters
- Send emails (including attachments)
- Send texts

Description

This course is designed to assist you in sending communications to payers on your ParentPay system. There are multiple ways to contact payers ranging from SMS text messages, emails, and printed letters.

ParentPay Daily Tasks

Who is it for: School Administrators

Objectives

By the end of the course you will be able to:

- Search for a pupil/payer
- Receive and respond to messages from payers
- Receive cash or cheque payments
- Create a PayPoint barcode letter
- Issue a refund
- Add secondary payers
- Produce a payment report
- Transfer balances
- Register childcare vouchers
- Amend the price of an item for a pupil

Description

This course is designed to cover some typical day-to-day tasks you may encounter when using ParentPay.

This course is by no means exhaustive, and you may encounter other tasks that may be covered in a different course.

ParentPay Donations Page

Who is it for: School Administrators

Objectives

By the end of the course you will be able to:

- Manage a donations page
- Enable gift aid on a donation page
- Make a donation
- Run useful reports

Description

This course is designed to assist users customise and manage their donations page.

ParentPay Merchandise Shops

Who is it for: School Administrators

Objectives
By the end of the course you will be able to:

- Customise your shop
- Creating products
- Manage products
- Make a purchase
- Run reports

Description
This course is designed to assist users customise and manage their merchandise shop page.

ParentPay Simple Payment Page

Who is it for: School Administrators

Objectives
 By the end of the course you will be able to:

- Get a simple payment page set up, change its title, and make child details optional
- How to enable Gift Aid
- How to support payers making a purchase
- Run and use helpful reports

Description:
This course is designed to assist users customise and manage their simple payment page.

ParentPay Trips Module

Who is it for: School Administrators

Objectives
By the end of this course you will be able to:

- Access the Day trips video channel
- Access to the Residential trips video channel
- List the booked attendees on a trip and who have paid
- Refund an individual or cancel a trip

Description:
The trips module is designed to provide a single page for creating and managing all your trips. Using the built-in wizard enables you to create trips without having to have specific payment item knowledge.

ParentPay Payment Items

Who is it for: School Administrators

Objectives
By the end of this course you will be able to:
- Set up a payment item
- Use record adjustment
- Produce PayPoint barcode letters
- Produce debt letters
- Run a payment report
- Export financial data
- Transfer balances between accounts or payment items
- Process a refund

Description:
This course is designed to assist you in building payment items on your ParentPay site. Payment items allow schools or organisations to collect funds for services/goods that are available through ParentPay. Payments can be made via online transactions using ParentPay as a payer, PayPoint barcode letters or cards (dinner money only) or, if necessary, cash or cheque in school.
There are many different types of payment items, and this course will cover all of them including examples.

Note: ParentPay has a specific Trips function covered in a separate course.
If you require this additional course, please enrol via the catalogue

ParentPay Supported Charity Page

Who is it for: School Administrators

Objectives
By the end of this course you will be able to:
- Effectively promote your page, making payers aware they can donate
- Support payers when making donations
- Report on, or request a report on, the total donations made via your page

Description:
This course is designed to help learners learn the basics for, and get the most out of, a charity donations page that ParentPay is proud to support. These pages are typically for Comic Relief and BBC Children in Need.

If you are interested in supporting other charities throughout the year and wish to use the page feature for your own supported charity, why not get in touch with our sales team who can discuss your requirements.

ParentPay Weekly Tasks

Who is it for: School Administrators

Objectives

By the end of this course you will be able to:
- Produce weekly meal reports
- Send letters to inactivated payers
- Send debt letters
- Produce financial reports
- Export financial data
- Generate a collection service statement
- Reconcile cash and/or cheque payments

Description:

This course is designed to offer some guidance to tasks that could be completed on a weekly basis.

Not all tasks may be necessary for your organisation, however, the modules may be a good indicator of any reporting or processes you'd like to implement once ParentPay has become a fully integrated system.

ParentPay Wraparound Care/Nursery

Who is it for: School Administrators

Objectives

By the end of this course you will be able to:
- Manually mark attendance (PAYG)
- Set up groups and patterns
- Set up bookable clubs
- Create a reducing balance upfront payment
- Invoice for upfront payment

Description:

This course is designed to assist you set-up and manage wraparound care clubs in your organisation.

There are many ways to set up wraparound and this will depend on the needs of your organisation.

This course will cover options such as manually marking, ad-hoc sessions to more complex methods such as bookings or invoicing. Please feel free to review as many or as few options you require. There are no completion criteria for this course, and you can come back to it as often as you like.

Non catalogued courses

The following courses are not catalogued but can be accessed via the relevant onboarding team.

ParentPay Start your Journey (Onboarding Learning Path – Part 1)

Who is it for: School Administrators

Objectives
By the end of this course you will be able to:

- Set calendar dates
- Add a bank account
- Add a manger to ParentPay
- Upload your pupil data

Description
Welcome to the start of your Onboarding Journey. This course makes up part one of your journey. After completion of this course, you will automatically receive the next one with your next steps.

ParentPay Ready for Go Live (Onboarding Learning Path – Part 2)

Who is it for: School Administrators

Objectives

By the end of part 2 you will be able to:

- Set the free school meal allowance
- Enter opening balances
- Add additional payers
- Send activation codes
- Promote ParentPay to parents

Description

Welcome to the final stage of your Onboarding Journey. This course makes up the part two of your journey. After completion of this course, you'll be ready for you training call with the onboarding team.

ParentPay: Arbor Attendance

Who is it for: School Administrators

Objectives
This course will make it possible for you to:

- Set up Back to school
- Use groups and patterns
- Customise mappings
- Set up FSM/UiFSM entitlement
- Amend meal prices
- Import and schedule an import from Arbour to ParentPay
- Manually mark meals
- Run useful reports

Description:

This course is designed to assist those wishing to use the Arbor Attendance Import feature to manage meals. The course will guide you through initial setup and configuration and daily management of the meal import.

ParentPay Booking With Menu to View

Who is it for: School Administrators

Objectives
By the end of the course you will be able to:

- Amend meal prices
- Set FSM allowances
- Manage attendance from the office
- Run useful reports

Description:
This course is designed to support those who have opted to use the booking with menu to view solution for their meals. With this solution a menu is displayed to payers, and they have the option to state the day that they want the pupil to have a meal. No choices can be made, the parent simply ticks to state they want to book a meal on a particular day.

ParentPay Cashless Tills

Who is it for: School Administrators

Description:

This course is designed for schools that use data capture or classic tills to record and charge for meals taken.

ParentPay Classroom Selection

Who is it for: School Administrators responsible for the set up and training of Classroom staff

Objectives:
- By the end of the course you will be able to:
- Personalise classroom selection options
- Set up sitting groups
- Set FSM allowance
- Amend meal prices
- Create a teacher account
- Mark a meal in the classroom
- Mark a meal/ amendment in the office
- Run classroom selection reports

Description:
This course is designed specifically for schools that have opted for the classroom selection solution for their lunches.

Classroom selection allows meal choices to be chosen in the classroom by using a colour option or pre-populated alternatives e.g. home meal or packed lunch provided from home

ParentPay Dinner Money Module (DMM)

Who is it for: School Administrators

Objectives
This course will enable you to:

- Set FSM allowance
- Amend a meal/event price
- Mark a meal using the attendance screen
- Set up a group and/or a pattern
- Run useful reports

Description:
This module is designed for schools that have decided to opt for a manual marking system for their dinners. This solution is also applicable to manual mark attendance to a club or session that uses the attendance screen to generate a charge.

ParentPay Meal booking

Who is it for: School Administrators

Objectives

By the end of the course you will be able to:

- Introduction to meal booking
- Amend meal prices
- Set free school meal allowance (FSM)
- Manage attendance from the office
- Run and use reports for meal booking

Description:

This course is designed for schools that have opted for the meal booking solution for their meal management.

Meal booking gives payers the option to state the day that they want the pupil to have a meal. No choices can be made, the parent simply ticks to state they want to book a cooked meal on a particular day.

ParentPay Menu selection

Who is it for: School Administrators

Objectives By the end of the course you will be able to:

- Amend meal prices
- Set FSM allowances
- Create a menu
- Manage attendance from the office
- Run useful reports

Description

This course is designed to support those who have opted to use the menu selection option to manage their meals.

With menu selection a payer has the option to select the meal choice(s) they want the pupil to have from a menu that is displayed. As many choices / courses as required can be displayed, for example starter, main, and dessert.

ParentPay: ScholarPack Meal Attendance

Who is it for: School Administrators

Objectives

By the end of this course you will be able to:
- Integrate ScholarPack with ParentPay
- Set FSM allowances
- Import meal registers daily
- Manually mark meals
- Run meal reports

Description

This course is designed to support those that wish to integrate Scholarpack and ParentPay to automate the marking of meals.

The course will cover the setting up of the integration all the way through to using the system on a daily basis.

ParentPay: SIMS Attendance

Who is it for: School Administrators

Objectives

By the end of this course you will be able to:
- Connect SIMS to ParentPay
- Set free school meal allowance (FSM)
- Amend meal prices
- Import meals into ParentPay
- Manually mark meals
- Run meal reports

Description

This course is designed to assist those who wish to import their meal choices from SIMS.

The course will cover setting the feature up and how to maintain meal marking on a day to day basis.

Schoolcomms

Catalogued Courses

Schoolcomms Clubs

Who is it for: School administrators and club leaders

Objectives:
This course will enable you to:
- Create a club, add sessions an configure club settings
- Get payments and enter opening balances
- Book a session as a payer or a manager
- Change, cancel and review who have booked onto sessions
- Add a late charge or credit
- Record payments by Childcare vouchers
- Mark attendance and run reports

(Note: This course is split into three modules; Intro, Creation and Daily tasks)

Description:
This course explores what the club's feature can do and how you might typically set these up.

It looks at the basics of building a club and supports you with the day-to-day running of a club, whether that be an enrichment club or a session booking club.

It also covers how to book a club, how to manage the club on a daily basis and finally what reporting you can access to help you.

Schoolcomms Create and Manage Payments

Who is it for: School administrators

Objectives:
This course will enable you to:

- Create, clone and edit a payment request
- View and manage payment request
- Record manual transactions
- Process refunds
- Run payment reports

Description:
This course is aimed at new Schoolcomms Admin users and covers everything needed for day to day management of Schoolcomms payments.

Cypad

Catalogued Courses

Cypad Menu Building and Administration for Catering Teams

Who is it for: Core Catering Team

Objectives
This course covers the following topics:
(We have separated the following into smaller sections with suggested role responsibilities)
Lead catering team
- Create meal items
- Create weekly menus
- Set up menu templates (weekly rotations)
- Create a theme menu
- Create a non-meal day (inset/training day)
- Add an allergy safe/alternate menu

Site level users:
- Add a student allergies or diet types
- Pre-order a meal

Kitchen users:
- Use the Cypad tablet

Site level users:
- Carry out daily tasks using the Cypad desktop
- Generate Cypad meal reports

Description
This course is designed to support **catering teams** through all aspects of menu building including standard menu building and rotations, allergy safe menus and theme days. The course also covers advanced features such as adding allergen and dietary information to limit choices to bookers if desired.

Notes: There is no need to enrol a learner onto the School Admin course as this course includes their modules.

Cypad Menu Building and Administration for School Staff

Who is it for: School Administration team

Objectives:

By the end of this course you will be able to:
- Maintain the system (user accounts, price changes, and meal booking settings)
- Create meal items
- Create weekly menus
- Create theme menus

Description

This course is designed to support schools that chose Cypad for in-house meal service through all aspects of menu building including standard menu building and rotations, allergy-safe menus and theme days.

Cypad Meals Daily Tasks for School Administrators

Who is it for: School Administrators, Kitchen Supervisors

Objectives

This course covers the following topics:

- Add student allergies or diet types
- Apply an allergy safe/alternate menu (if requested to by caterer/LEA)
- Pre-order meals
- Use the Cypad tablet
- Carry out daily tasks using the Cypad desktop admin
- Generate meal reports

Description:

This course is designed to support site level users in the day-to-day management of meal service using the Cypad system. It also includes information on how to assign allergy or dietary information to pupils if this functionality is to be used. Finally, the course assists in reporting of meal service within the site.

Cypad Introduction to Kitchen Manager

Who is it for: Core catering team

Objectives

By the end of this course you will be able to:

- Understand what Kitchen Manager has to offer
- Navigate around the system
- Get information about available modules

Description

This course is designed for new Kitchen Manager users who would like to learn more about the system and get familiar with the navigation.

Cypad Kitchen Manager Forms Module

Who is it for: Core catering team

Objectives

By the end of this course you will be able to:
- Add form settings
- Publish forms
- Analyse completed forms
- Edit forms

Description:

Every kitchen will likely have some documentation that is needed to be completed. This might be something simple like a cleaning register or leave request or maybe even something more advanced like a temperature check form or personal development plan.

The Cypad Kitchen Manager Forms system allows you to create forms custom to your needs, publish them to your staff using the tablets, and report on them centrally.

Cypad Kitchen Manager Stock Module

Who is it for: Caterers, Area Managers

Objectives

This course covers the following topics:
- Recording staff hours on the tablet
- Managing staff hours in the desktop application
- Overview of staff record settings
- Analysis of Timesheets

Description:

Through this short module, you will learn about the ways to send information to Cypad-supplied tablets, check read status and deliver important messages to kitchen staff in the shortest possible time. Clear and timely communication is essential for kitchen management and thanks to available functionality it can be easily set up in different formats to fit all needs.

Cypad Kitchen Manager Orders and Deliveries Module

Who is it for: Core catering team

Objectives

By the end of this course you will be able to:
- Select and use the correct Supplier Integration type
- Process information about orders and deliveries
- Place a new order from the desktop
- Deal with orders with discrepancies

Description:

Welcome to the Orders and Delivery module of the Kitchen Manager application. Throughout this module, we will explore how to work with suppliers, control orders and deliveries as well as process invoices all while maintaining a high level of accuracy and efficiency. By the end of this course, you will develop further knowledge and skills necessary to streamline your catering operations using the Kitchen Manager.

Cypad Kitchen Manager Publish Module

Who is it for: Core catering team

Objectives

By the end of this course you will be able to:
- Send information to Cypad-supplied tablets
- Check the read status and deliver important messages to kitchen staff

Description:

Through this short module, you will learn about the ways to send information to Cypad-supplied tablets, check read status and deliver important messages to kitchen staff in the shortest possible time. Clear and timely communication is essential for kitchen management and thanks to available functionality it can be easily set up in different formats to fit all needs.

Cypad Kitchen Manager Staff Module

Who is it for: Core catering team

Objectives

By the end of this course you will be able to:

- Add new members of staff and edit staff records
- Support recording of staff hours on the tablet
- Analyse and edit timesheets

Description:

As with anything new in your kitchen, this is your training package to help you familiarise yourself with the system, learn basic functionality and maybe even learn some new processes to help you day-to-day.

Cypad Nutritional Analysis

Who is it for: Caterers

Objectives

By the end of this course you will be able to:

- Create cooking methods
- Add a new stock item
- Add/edit a sock item via import
- Build a menu
- Build a recipe
- Build a weekly menu
- Deal with missing nutritional and pack data
- Run Nutrition and Costing Reports

Description

This course is to help show you how to use the Menu Nutritional Analysis feature to manage the Nutritional Information, Menu Item Costing details and Menu Item Recipes.

In this course, we will keep a common theme in mind.

NOTE: The recipe's function is only available in the Next-Gen User Interface.

Non catalogued courses

The following courses are not catalogued but can be accessed via the relevant onboarding team.

Central Menu Management - Caterer/LEA*

Who is it for: Caterer/LEA

Objectives
By the end of this course you will be able to:
Lead Catering team:

- Personalise your options
- Create menu items
- Create master weekly menus
- Set up master templates (weekly rotations)
- Create a theme menu
- Create a non-meal day (inset/training day)
- Ad an allergy safe/alternate menu
- Approve menus

Site Level Users:

- Submit menu choices
- Add student Allergies and Diet Types
- Pre-order a meal
- Generate Cypad Meal Reports

Kitchen Users:
How to use the Cypad Tablet

Description
This course is designed to guide caterers/LEAs that are using the ParentPay Meal Selection system powered by Cypad but also uses the central menu management functionality.

This course is a complete training package and covers all areas of the meal selection system from creating and applying a menu, including special dietary or allergy menus specialised for individuals, to marking meals and generating reports.

Central Menu Management - School Admin Team

Who is it for: School Administration Team

Objectives By the end of this course you will be able to:

- Submit menu choices
- Add student Allergies and Diet Types
- Pre-order a meal
- Generate Cypad Meal Reports

Description

This course is designed to assist site level users whose caterer/LEA has opted to use ParentPay's Meal Selection system with the added function of central menu management.

This course will cover topics from how to add allergy and dietary information to student records through marking meals, day to day use and finally reporting.

Cypad Course 1: Meal Manager Integration Tasks

Who is it for: School Administrators

Objectives

By the end of this course you will be able to:

- Add Account, Site Info, and user settings
- Create meal items
- Create weekly menus
- Set up menu templates
- Create a theme menu
- If applicable, set up SIMS Integration

Description:

This course is designed to assist organisations that have opted to use Cypad Meal Manager as their meal solution, initially configure their site and menu ready for integration with ParentPay.

The integration will allow Cypad Meal Manager to connect with your ParentPay site, pupil data and balance information allowing payers to make and pay for meal bookings.

This course will help you to fill in the Student Price must be filled in and create at least one menu and apply to a template so that you may successfully complete your integration

Cypad Course 2: Cypad Meal Manager Daily Tasks - ParentPay Customers

Who is it for: School Administrators

Objectives

By the end of this course you will be able to:

- Add a student allergies or diet types
- Create and assign a special menu
- Pre-order a meal
- Use the Cypad tablet (optional)
- Use the Cypad desktop admin
- Generate Cypad Meal reports

Description

This course is designed to further support organisations who have completed the setup of their Meal Manager system and now wish to further develop their knowledge as to how the system will work on a day to day basis.

It is important that schools using Meal Manager have completed the Cypad Meal Manager set up course prior to proceeding.

Cypad Course 2: Meal Manager Daily Tasks - Schoolcomms Customers

Who is it for: School Administrators

Objectives

By the end of this course you will be able to:

- Add a student allergies or diet types
- Create and assign a special menu
- Pre-order a meal
- Use the Cypad tablet (optional)
- Use the Cypad desktop admin
- Generate Cypad Meal reports

Description

This course is designed to further support organisations who have completed the setup of their Meal Manager system and now wish to further develop their knowledge as to how the system will work on a day-to-day basis.

It is important that schools using Meal Manager have completed the Cypad Meal Manager Integration Tasks course prior to proceeding.

Cypad Meal Register: Kitchen Tablet User Guide

Who is it for: Caterers, Kitchen Supervisors, Kitchen Staff

Objectives
This course covers the following topics:
Tablet housekeeping
Pre-lunch meal reports
How to mark meals

Cypad Kitchen Manager Learning Path

Who is it for: Core Catering Team

Objectives
Upon completion of all modules in the learning path, you will develop a comprehensive understanding of all system aspects and receive guidance for further practice.

Description:
This learning path offers a comprehensive training package for both new and experienced Kitchen Manager Users.
It includes the following modules:
Introduction to the system
Forms
Stock
Orders and Deliveries
Publish
Staff

BlueRunner

Catalogued courses

BlueRunner Administrator Course for POS Users

> **Who is it for:** POS Admin Users
>
> **Objectives**
> By the end of this course you will be able to:
> - Manage user accounts
> - Complete admin tasks related to finance management
> - Manage data for recognition methods
> - Generate reports
>
> **Description:**
>
> This is an introductory course for the Back of House desktop application that covers the basics, enabling new Point of Service users to start using the system. Throughout the course, you will be introduced to a variety of admin tasks, including financial management, editing recognition method data, and generating reports.

BlueRunner Menu Building Course for POS Users

> **Who is it for:** POS admin Users
>
> **Objectives**
> By the end of this course you will be able to:
> - Add and edit menu products
> - Change existing and create new menu cycles
> - Assign menu cycle to schools
>
> **Description:**
> BlueRunner POS Solution provides operators with all the tools needed to run their kitchen and manage an efficient service with a low-cost space-efficient tablet solution. Reduce the need for expensive and bulky hardware and offer a truly flexible service in school.
>
> This course will cover the menu-building part of the system. It will help you better understand the background settings as well as learn how to make changes to menus after the initial setup.

BlueRunner Hospitality Management Module

Who is it for: Caterers getting started with Hospitality Booking System

Objectives

By the end of this course you will be able to:

- understand the main navigation principles and key terminology
- navigate around bookings and take required action
- generate reports according to your needs

Description:

This is an introduction course for users new to the Hospitality Management Module. It consists of three parts and covers navigation, key terminology, the process of managing bookings, and reports.

SIMS