

## How to use the End of Year Assistant

The End of Year Assistant has been designed to help complete essential end of academic year and new academic year tasks.

By ensuring these tasks are completed early, the school's ParentPay site will be prepared for the start of the new year, reducing the tasks to be completed during that busy period.

The End of Year Assistant will be made available to schools early in the Summer term. While it will be available for completion, initially, you are able to postpone completing it until a more convenient time if needed. Approximately one month before the end of the Summer term, it will become mandatory to complete any critical items. This should take no more than 10 minutes and as a minimum requires you to have the following to hand:

- Term dates for the new academic year
- Closing dates for the new academic year (may be updated if changes occur)
- Meal prices for the new academic year (where appropriate)
- Free school meal allowance for the new academic year (where appropriate)

**NOTE:** We strongly encourage you to complete all critical tasks as soon as you are able to.

### Viewing the End of Year Assistant

Once the End of Year Assistant has been enabled by ParentPay, a new icon will appear on the home screen when the school's ParentPay manager logs into the system.



When the End of Year Assistant icon is selected, a list of tasks to complete will be displayed.

**NOTE:** Only the tasks relevant to the school will be shown.

### End of year assistant



















#### Summary

This dashboard will assist you in completing the end of year tasks required to begin a new academic year within ParentPay. It also provides a simple series of optional tasks, tailored to your schools' usage, that ensure you are appropriately configured before the new year begins.

You can access this dashboard at any time from the menu or using the assigned button on the home page. Any progress made by you or other managers at your school, will be shown on the dashboard each time you open it.

**If you are not responsible for any of the administrative activities listed, you should not attempt to complete the tasks. This may be because a local authority or caterer administers your site or because you only have limited duties within ParentPay as a user.**

To begin a task, select it from the list below.

	Update application settings - 0 of 2 tasks complete (2 mandatory task remaining)	
	Update contact details - 0 of 1 tasks complete (1 mandatory task remaining)	
	Update meal/session prices - 0 of 2 tasks complete (2 mandatory task remaining)	
	Managing debt and credit balances - 0 of 2 tasks complete	
	Update meal patterns - 0 of 1 tasks complete	
	Update menus - 0 of 1 tasks complete	
	Upload new pupils - 0 of 2 tasks complete	
	Record upcoming changes - 0 of 1 tasks complete	
	Final considerations	

**Getting help**

Should you wish to get in touch with the support team directly about these tasks, or about any other issues or questions you have, you can contact us using:


- Telephone - call us on 02476 994 820 between 0830 and 1630 Monday to Friday (exc. Bank Holidays)
- Email - you may email [support@parentpay.com](mailto:support@parentpay.com) at any time and we will contact you as soon as we are able in relation to your query or issue.

## Postponing the End of Year Assistant

The End of Year Assistant can initially be dismissed until a later date. School managers can enter any date prior to the mandatory deadline, and the End of Year Assistant will re-appear on the date selected.

If you would like to complete the assistant at a later date, you can set a reminder here

Please note that the deadline for completing all the tasks is

 [Set reminder](#)

If the End of Year Assistant is not completed by the deadline, the list of tasks to complete will automatically appear on screen the next time the school's ParentPay manager logs into the system. At that point, it will not be possible to navigate away from the End of Year Assistant until the mandatory tasks have been completed.

## Tasks





When the End of Year Assistant is accessed, the dashboard will be displayed containing the tasks to be completed. The number of tasks will vary depending on how the school uses ParentPay.

There are potentially nine tasks to complete:

- **Update application settings** – term dates and closure dates
- **Update contact details** – update or add new contact details
- **Update meal/session prices** – meal or session costs and FSM Allowance
- **Managing debt and credit balances** – enabling the school to manage any debts or credits
- **Update meal patterns** – adding, amending or ending meal patterns
- **Update menus** – adding or extending menus
- **Update new pupils** – uploading new pupils and producing activation letters
- **Record upcoming changes** – prompting the user to state if they are about to change MIS systems, cashless till providers, school name and/or DfE/SEED number
- **Final considerations** – prompting the user to update site data settings

Some tasks will need to be completed before the end of the summer term. Other tasks, such as pupil uploads, will not need to be completed until the school returns at the beginning of the autumn term.

The status of the task will update once a task has been fully or partially completed:

-  Task is complete
-  Task is partially complete
-  Task has not yet been completed
-  Not a task that requires any action, the page contains useful information only

The mandatory tasks will need to be completed in the order they are listed, for example, a user will not be able to update meal prices until the term dates and school closure dates have been entered in the **Update application settings** task. Once the mandatory tasks have been completed the user will be able to access the remaining tasks in any order.

Once a task has been marked as completed, it cannot be accessed to make additional changes. If further changes are required, or the school's ParentPay manager made a mistake when completing the task, the details can be amended from within the main ParentPay site.

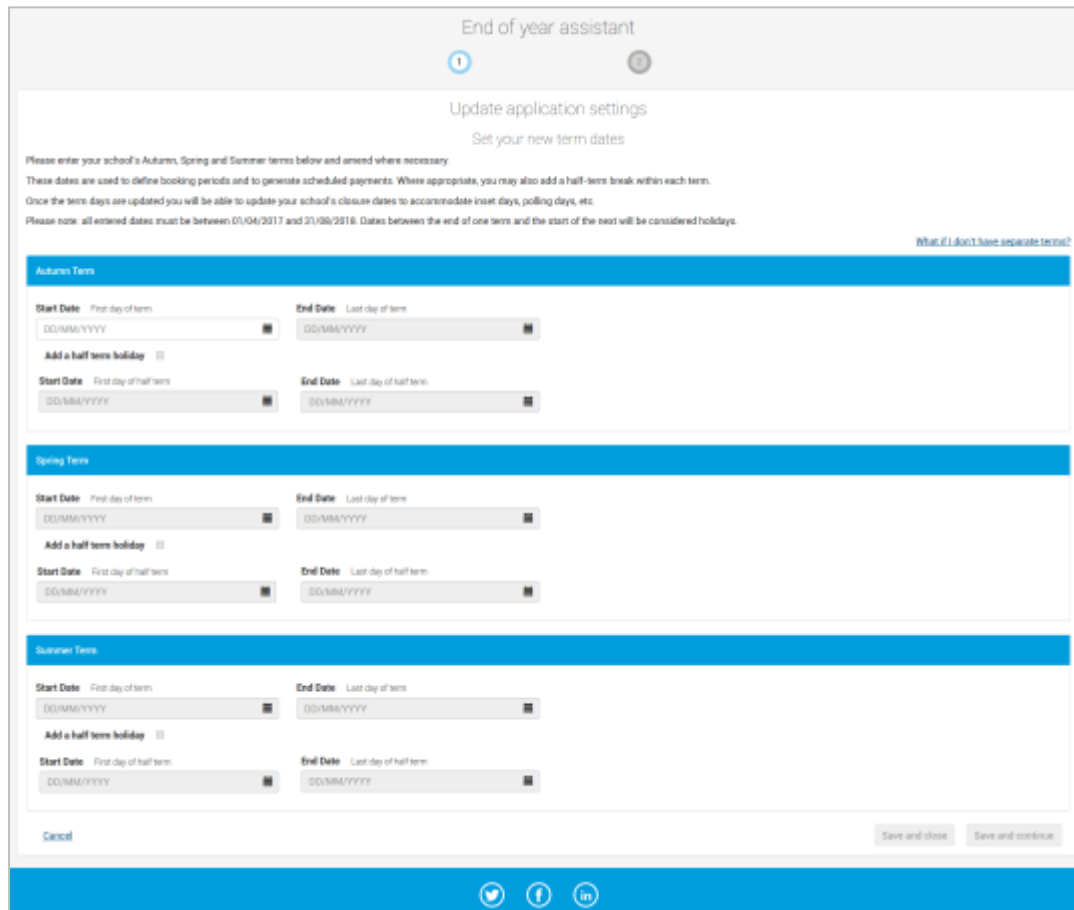
## Application settings

The first task within the wizard is updating the application settings. This will require the school's ParentPay manager to add new term dates and closure dates.

The user will not be able to move forward to the next task within the End of Year Assistant until the term dates have been entered and saved.

### New academic year term dates

The term periods will need to be added for the Autumn, Spring and Summer Term.



1. Select **Update application settings**
2. Enter the **Start Date** for the **Autumn Term** by either typing the date in, or using the calendar icon to select the correct date.
3. The **End Date** will then be made available. Type the required date into the box, or use the calendar icon to select the correct date.
4. If required, select the **Add a half term holiday** check-box and enter the first and last dates of the holiday.
5. Repeat the process as required for the rest of the terms.
6. Select **Save and continue** or **Save and close**.

Add a half term holiday

## Scheduled closure dates

Closure days will then need to be entered. These usually include INSET/Teacher training/In service days, and bank holidays that fall during the school terms.

The closure days can be set by selecting the appropriate dates from the calendar displayed.



End of year assistant

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Update application settings

Add scheduled closure dates

Please enter the closure dates for the academic year 2017/2018.

Closure dates must be within your term dates, not during holiday periods. Please enter your school's closure dates to indicate days where the school will not be open during term time.

Closure dates should include dates where the school is closed (within a term) (inset days, polling days, etc.)

Please note, these days must be selected prior to the creation of any menus or patterns in order to be appropriately excluded. Failure to do so will mean bookings can be made for those dates and any automatically generated patterns will be charged as if the school were open.

Key: 1 Weekend/Holiday 2 Term Day 3 Closure Date

September 2017

Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

October 2017

Mo	Tu	We	Th	Fr	Sa	Su
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

November 2017

Mo	Tu	We	Th	Fr	Sa	Su
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

December 2017

Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

January 2018

Mo	Tu	We	Th	Fr	Sa	Su
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February 2018

Mo	Tu	We	Th	Fr	Sa	Su
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29				

March 2018

Mo	Tu	We	Th	Fr	Sa	Su
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

April 2018

Mo	Tu	We	Th	Fr	Sa	Su
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

May 2018

Mo	Tu	We	Th	Fr	Sa	Su
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

I have entered all my Closure dates. Total Selected: 5

Cancel Save and close

A maximum of 15 closure dates can be entered. Any weekends and school holidays will be greyed out and cannot be selected. Once all the closure dates have been entered, select the **I have entered all my Closure dates** check box, and select **Save and close**.

**NOTE:** Once term and closure dates have been saved no further changes can be made via the End of Year Assistant. If changes need to be made, or additional closure dates need to be added, this can be completed in the main ParentPay site in **Settings > Manage calendar**.

## Update contact details

**Update contact details** will allow the school to update any contact information for the person or department who deals with queries regarding ParentPay.

End of year assistant

Update contact details

Update your schools support contact details

This task is provided to capture or update the support contact information we hold for your school. Where appropriate, you may also provide a secondary contact for meal related queries. This information will be used by the ParentPay Support Team and where appropriate, by parents that require school support.

All fields are mandatory unless otherwise stated.

Please enter the contact details for the person that deals with your school's general support enquiries.

**Name**

**Telephone number**

**Email address**

Should parents contact someone different if the enquiry is meal related?

No  Yes

[Cancel](#) [Save and close](#)

If the school provides meals, and any queries regarding meals should be directed to someone other than the main contact, select **Yes** in answer to **Should parents contact someone different if the enquiry is meal related?**

If yes is selected, additional text boxes requesting contact information will be displayed.

Should parents contact someone different if the enquiry is meal related?

No  Yes

**Name**

**Telephone number**

**Email address**

[Cancel](#) [Save and close](#)

**NOTE:** This information cannot currently be edited within the main ParentPay site.

## Meal/session prices

The End of Year Assistant will display the current meal or session price for any live lunchtime event types. Any new prices/charges can be entered if any meal/session costs are due to change at the start of the new academic year.

A link to a guidance document will be displayed, and provides further information on entering price changes.

Select either **Save and continue** or **Save and close** to lock in the lunchtime meal type prices.

### End of year assistant

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#### Update meal/session prices

Confirm or amend your meal or session prices

We have automatically extended your current meal types.  
 Please review the meal prices. You may either accept the existing prices or, if required, adjust the values before saving.  
 These values will be the starting prices for your new academic year.  
 Please note: if you have a catering provider who manages your meal prices, you should consult them before changing any values.  
[How do I add or remove meal types?](#)

Meal time: Lunch time

Meal type	Group(s)	Price	Price to school
Pupil Paid Meal NEW	Pupils	£ 2	£ 2
Pupil lunch recorded at school	Pupils	£ 2	£ 2

[Cancel](#) [Save and close](#) [Save and continue](#)

If the page is saved without any adjustments to meal prices being made, a message will be displayed. If the price is correct, select **Yes**.

You have not changed any meal prices, are you sure this is correct?

Please note that by confirming below all current meal prices will be used to start the new academic year.

[Yes](#) [No](#)

If changes to the meal prices have been entered and the page is saved, a message will be displayed asking to confirm the changes are correct. Select **Yes** to continue, or **No** to make further changes.

Please note that by confirming below all current meal prices will be used to start the new academic year.

[Yes](#) [No](#)

The End of Year Assistant will display the current FSM allowances on screen for any relevant groups. If any of the allowances are due to increase at the start of the new academic year, the School Manager will be able to update the prices on screen.


The system will either extend the allowance dates to retain the current value, or will create new FSM allowances to reflect any increase inputted by the School Manager.

The School Manager will either leave the allowance values as they appear on screen or will update the values depending on the new prices inputted into the **Daily FSM value** field.

The School Manager will need to select **Save and close** to lock in the FSM allowance values.

If there is an increase in price a new FSM allowance will automatically be created for the start of the new academic year displaying the new daily FSM value.

## End of year assistant



### Update meal/session prices

#### Confirm or amend your daily FSM allowances

We have automatically completed your daily FSM allowances for the next academic year using your current values.  
 If you are happy that the values provided are correct for the start of the next academic year you can simply save and continue.  
 If any of the allowances are due to change at the start of the new academic year, please enter new values before saving.

**Please note:** we advise that the Free School Meal allowance should be equal to or greater than the associated meal price. If it is less then payers will need to pay the difference between the meal price and the daily FSM allowance or go into debt.

Years	Daily FSM Value (£)
R, 1, 2, 3, 4, 5, 6, N	£ 2

Save and close
Cancel

If the user selects to Save the changes without updating the meal type cost, they will receive a message on screen asking them to confirm this is correct.

You have not changed any FSM allowances, are you sure this is correct?  
 Please note that by confirming below all FSM allowances will be used to start the new academic year.

No

If the user has updated any meal type costs they will receive a message on screen asking them to confirm this is correct.

Please note that by confirming below all FSM allowances will be used to start the new academic year.

No

### School that use cashless till solutions

Schools with a cashless till system will be able to view the meal price within the End of Year Assistant however, the price box will be greyed out and they will not be able to amend the cost of the school meal.

Meal time: Lunch time

Meal type	Group(s)	Price to school	Price
DC meal type	Pupils, Staff, Other	£ 0 :	£ 0 :

Save and continue
Save and close
Cancel

This is to ensure unnecessary changes are not made which may result in errors with pricing and charging at the till.

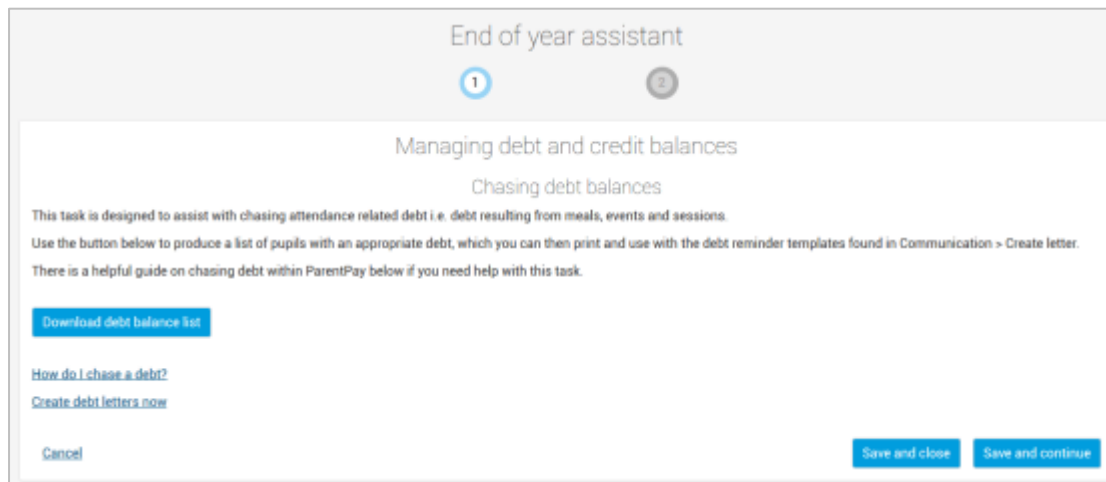


## Debt and credit balances

The End of Year Assistant provides information on managing debt and credits within the ParentPay site.

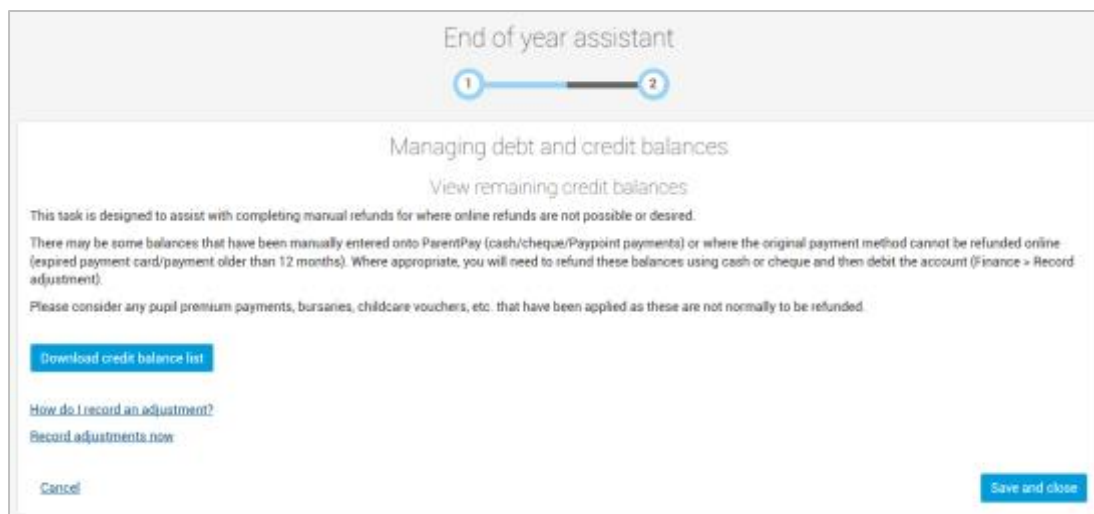
The option to **Download debt balance list** can be selected, and a list of all pupils with a debt against their account will be provided. This can then be used to reclaim the outstanding debt.

Guidance on the best practise for chasing debt can be accessed by using the link, **How do I chase a debt?** Selecting **Create debt letters now** will redirect the page to the ParentPay Communication Centre, where a variety of debt letter templates can be accessed and used as required.



Some schools may find that some school leavers have meal balances remaining on their account. Also, some schools, caterers, or Local Authorities may require all pupils to end the year with a £0.00 balance. As with the debt option, a link will be displayed enabling a list of credit balances to be downloaded. This link is titled **Download a credit balance list**. Selecting **How do I record an adjustment** will open a supporting guidance document.

Selecting **Record adjustments now** will redirect to the **Record Adjustment** tab within the ParentPay site to enable them to make any adjustments required to the accounts with a credit.



Guidance on completing an electronic refund can be found [here](#).

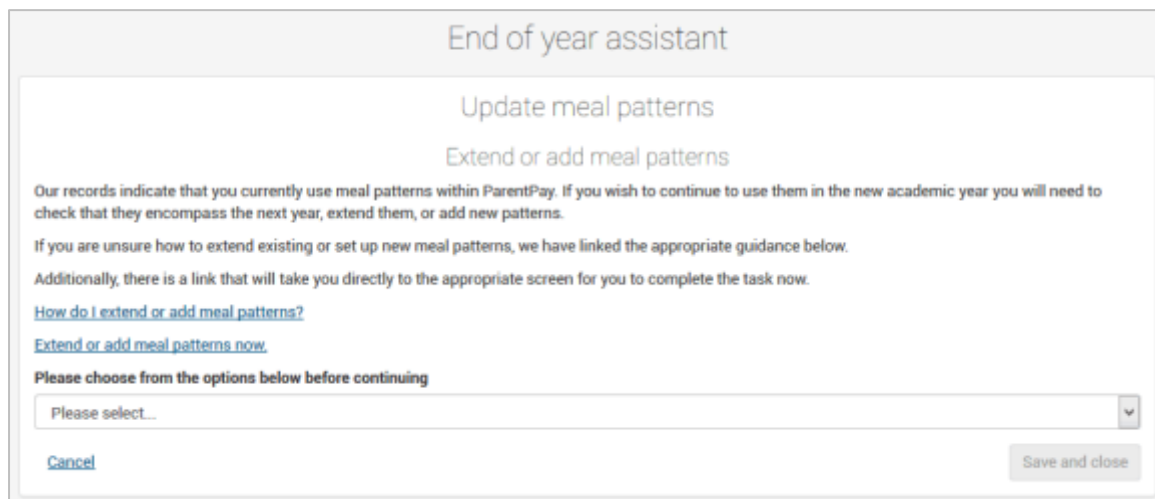
**NOTE:** Some local authorities and caterers do not allow schools to make electronic refunds. If a refund is required, and cannot be made by the school please contact the owner of the bank account to process a refund.

## Meal patterns

Meal patterns may not apply to all schools, and as such may not be displayed on all school's ParentPay sites.

A link is displayed providing guidance on **How to extend and add meal patterns**.

To update the meal patterns, select **Extend or add meal patterns now**. The page will navigate to **People > Groups**. Follow the guidance document to update the patterns as required.



End of year assistant

Update meal patterns

Extend or add meal patterns

Our records indicate that you currently use meal patterns within ParentPay. If you wish to continue to use them in the new academic year you will need to check that they encompass the next year, extend them, or add new patterns.

If you are unsure how to extend existing or set up new meal patterns, we have linked the appropriate guidance below.

Additionally, there is a link that will take you directly to the appropriate screen for you to complete the task now.

[How do I extend or add meal patterns?](#)

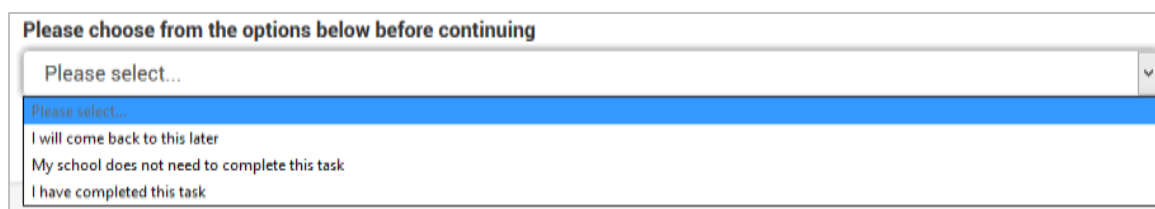
[Extend or add meal patterns now.](#)

Please choose from the options below before continuing

Please select...

[Cancel](#) Save and close

Select the **Please choose from the options below before continuing** drop down menu.



Please choose from the options below before continuing

Please select...

- Please select...
- I will come back to this later
- My school does not need to complete this task
- I have completed this task

Depending on whether the task has been actioned, select of the following choices:

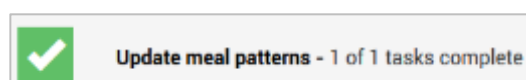
**I will come back to this later** – this will leave the task outstanding on the dashboard and enable users to return and complete the task later.



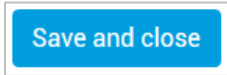
**My school does not need to complete this task** – this will mark the task as completed on the dashboard.



**I have completed this task** – this again will mark the task as completed on the dashboard.



Make the required selection, and select **Save and close**



## Menus

**Menus** applies to any schools that allow payers to book or select meals via the ParentPay system.

The menu task will not display to any schools who do not use menus currently.

Select the link **How do I extend or add menus?** to open a document providing information on updating the menu.

End of year assistant

### Update menus

#### Extend or add menus

Our records indicate that you currently use menus within ParentPay. If you wish to continue to use them in the new academic year you will need to extend them or add new menus.

If you are unsure how to extend existing or set up new menus, we have linked the appropriate guidance below.

[How do I extend or add menus?](#)

If this is usually done by ParentPay support, please call us on 02476 994 820.

**Please choose from the options below before continuing**

Please select...
▼

Save and close
[Cancel](#)

Select the **Please choose from the options below before continuing** drop down menu.

**Please choose from the options below before continuing**

Please select...
▼

Please select...

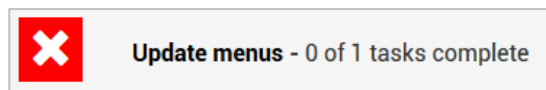
I will come back to this later

My school does not need to complete this task

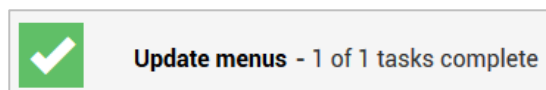
I have completed this task

Depending on whether the task has been actioned, select of the following choices:

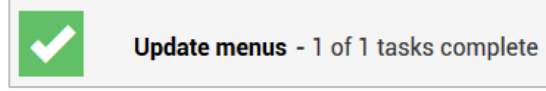
**I will come back to this later** – this will leave the task outstanding on the dashboard and enable users to return and complete the task later.



**My school does not need to complete this task** – this will mark the task as completed on the dashboard.



**I have completed this task** – this again will mark the task as completed on the dashboard.



Make the required selection, and select **Save and close**

Save and close

## New pupils and activation letters

This task is provided to highlight the need to complete an upload of new intake pupils for the new academic year. Completing this section is dependent on the MIS system you use as this will dictate when pupils are moved into their new year groups. There are three sections provided to guide you through this task, one for manual uploads through the ParentPay managers screen, one for integrated upload solutions such as Scholarpack, CMIS, RM Integris or SEEMIS, and one for all other uploads using the MIS: Sync application.

**NOTE:** if you have **permanent UPN's** available for each new starter, it is possible to complete a 'pre-admission' upload. If this is something you are interested in and are unsure of how to do this, please contact the support team.

End of year assistant

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Pupil upload  
Upload new pupils

Before the start of the new academic year, you may wish to add potential new intake students as pre-admissions. To do so you must have their allocated UPN's. You can not upload pre-admission students without their UPN's being allocated.

Once your new academic year has started, and once you have promoted the academic year within your MIS system (where applicable), you will need to complete your first upload of students into the new year. These student records will then be available throughout the ParentPay system in their correct year groups. Failure to complete this task will impact meal allowances, not enable new intake students fully and make it difficult to search your records correctly.

When you are ready to complete your first upload into the new academic year:

- If you manually upload your data into ParentPay, the link below will take you to the upload screen for you to complete your upload.  
[Upload new pupils now](#)
- If you currently use an integrated solution, the link below will take you to the upload screen where you will have the option to select and upload your data from the integrated system  
[Upload new pupils now](#)
- If you use the MIS:Sync application to upload your data, please follow your normal processes for uploading pupils.

**Please choose from the options below before continuing**

Please select...

[Cancel](#)
Save and close
Save and continue

Select the **Please choose from the options below before continuing** drop down menu.

**Please choose from the options below before continuing**

Please select...

Please select...

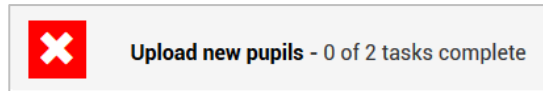
I will come back to this later

My school does not need to complete this task

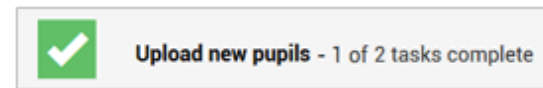
I have completed this task

Depending on whether the task has been actioned, select of the following choices:

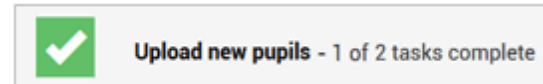
**I will come back to this later** – this will leave the task outstanding on the dashboard and enable users to return and complete the task later.



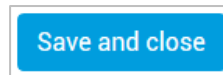
**My school does not need to complete this task** – this will mark the task as completed on the dashboard.



**I have completed this task** – this again will mark the task as completed on the dashboard.



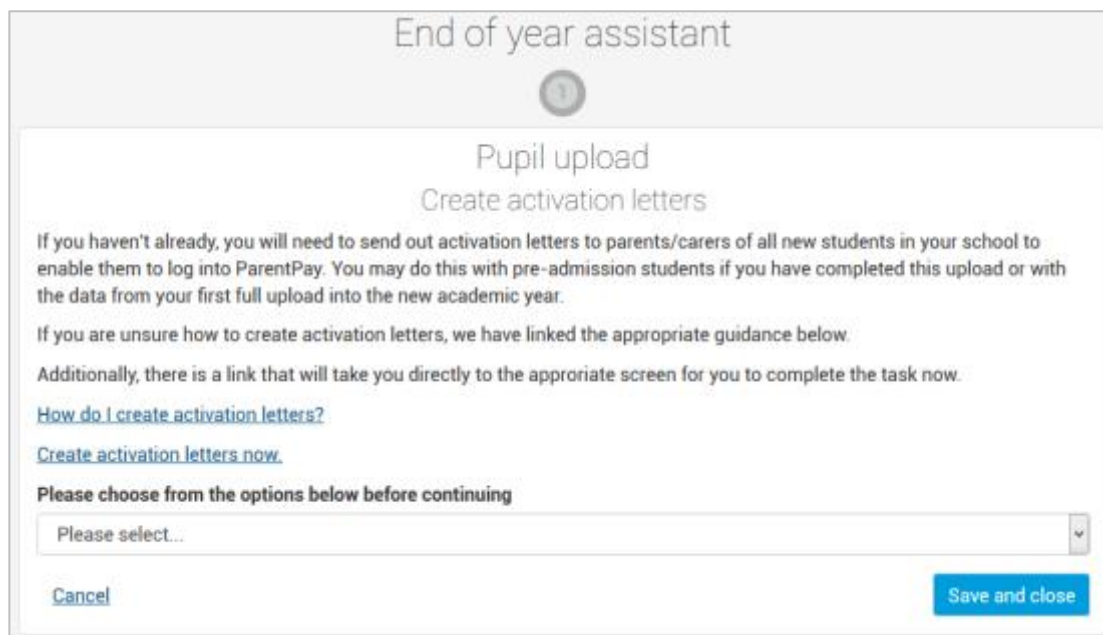
Make the required selection, and select **Save and close** or **Save and continue**.



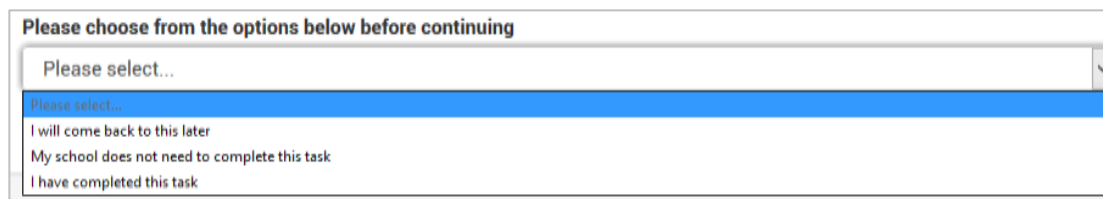
Once the upload has been completed, activation codes will be created for any new starters. These can be distributed to the parents/carers of any new starters in order for them to activate their accounts and make any required payments.

Selecting **How do I create activation letters?** will provide access to a guidance document.

Selecting **Create activation letters now** will redirect the ParentPay site to Communication. This will provide access to the letter templates, and the activation letters can be created.



Select the **Please choose from the options below before continuing** drop down menu.



Depending on whether the task has been actioned, select of the following choices:

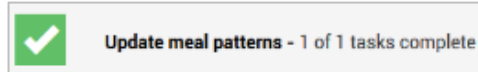
**I will come back to this later** – this will leave the task outstanding on the dashboard and enable users to return and complete the task later.



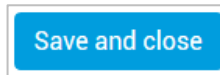
**My school does not need to complete this task** – this will mark the task as completed on the dashboard.



**I have completed this task** – this again will mark the task as completed on the dashboard.

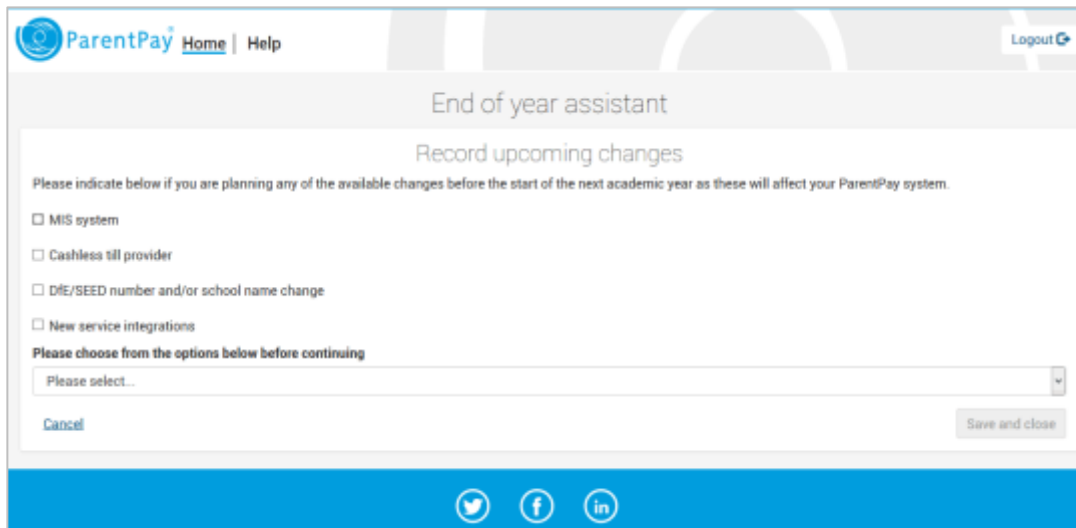


Make the required selection, and select **Save and close**



## Record upcoming changes

It is vitally important you inform us if you are intending on changing any solution that integrates with ParentPay. This task enables you to inform the ParentPay support teams of upcoming changes, allowing us to contact you to help avoid potential migration issues.



### MIS system

1. If the school is changing the provider of their MIS system or pupil database, select the **MIS system** check box.
2. Select the new MIS provider from the drop-down menu.
3. If the provider is not listed, select **Other** and enter the name of the new provider into the text box.
4. Enter the date that the school will switch from the old MIS system to the new system.
5. The ParentPay support team will contact the school with further details on tasks to complete and factors to consider prior to the MIS switch being made.

### Cashless system

1. If the school is changing the cashless till provider, or will be starting to use a

cashless system for the first time, select the **Cashless till provider** check box.

2. Select the new cashless provider from the **New cashless provider** drop-down menu.
3. If the new provider is not listed, select **Other** and enter the name of the new provider into the text box.
4. Enter the date that the cashless tills will be switched from the old provider to the new.
5. The ParentPay support team will contact the school with further details on tasks to complete and factors to consider prior to the MIS switch being made.

### DfE/SEED number and/or school name change

1. If the school is changing the DfE/SEED number or the school name, select the **DfE/SEED number and/or school name change** check box.
2. Enter the new DfE/SEED number (if required)
3. Enter the new school name (if required)



DfE/SEED number and/or school name change

New DfE/SEED number

New school name

Date of change

4. Enter the date that the name or DfE/SEED number will be changing

### New service integrations

If the school will be making any other changes that may affect the usage of ParentPay, select the **New service integrations** check box. Enter details of the new systems into the text box. This may be the introduction of an integration with Pebble or Private Fund Manager.



New service integrations

New service integrations

## Final considerations

**Final considerations** contains a list of items that a school may want to be aware of. These include advice on reviewing school information visible to payers, and reviewing the notifications displayed on the manager home screen.

ParentPay Home | Help Logout

## End of year assistant

### Final Considerations

Please find below a list of other items that you might wish to consider before the start of the new academic year:

**Reviewing your school information visible to parents**

You may wish to review and update the information that you have configured on your payers' screens. For instance, you may have changed the services you offer or changed some of the schools' processes that you may wish to make your payers aware of.

[How do I update the school information visible to parents?](#)  
[Update school information visible to parents](#)

**Reviewing all notification items**

During the end of the current academic year period, and throughout the beginning of the new academic year, ParentPay may introduce new notifications within the My notifications area of the manager home screen to highlight the status of critical tasks. You should review these notifications regularly.

[How do I select which notifications are visible on my manager homepage?](#)  
[Update which notifications are visible on my manager homepage](#)

Close

## Completion of the End of Year Assistant

Ideally, all tasks within the End of Year Assistant will be completed. This ensures the ParentPay site is set up correctly and ready for the start of the new academic year.

The End of Year Assistant dashboard will display a set of green ticks against each task to confirm it has been completed.

**NOTE:** if you have any concerns or queries as you complete the assistant at your school, please contact the service team who will assist you with any concerns or queries that you may have.

To begin a task, select it from the list below.

- Update application settings - 2 of 2 tasks complete
- Update meal/session prices - 2 of 2 tasks complete
- Update meal patterns - 1 of 1 tasks complete
- Upload new pupils - 2 of 2 tasks complete
- Record upcoming changes - 1 of 1 tasks complete
- Final considerations