

## Other MIS Users September Readiness Checklist

### Preparing for the start of the new academic year

At the end of this academic year / beginning of the new academic year, you will need to update and re-import your spreadsheet (CSV file). You will need to remove any leavers and add any new members. All registration groups and year groups of existing school members will need to be updated to reflect the new academic year. Once the spreadsheet is updated, you will need to re-import this into Schoolcomms.

Please ensure that you do not amend the MIS IDs for your existing students.

You can then delete any leavers when you no longer wish to have any further contact with them.

Access the Delete Leavers help guide [here](#).

### Entering new parents/staff details

You will need to individually add each parent along with their email address and mobile manually into Schoolcomms.

Access the help guide for adding/amending linked contacts [here](#). Parental Responsibility also needs to be applied for parents to be able to give consent, see balances, and make bookings on School Gateway. To review and identify any gaps in data currently held in Schoolcomms, check your registered users with the Management Report. Access the Management Dashboard help guide [here](#).

### 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. See the Data Issues help guide [here](#).

### Create/delete Staff Schoolcomms accounts for new/leaving staff members

Your school multi-user administrators can create, amend, unlock, and delete staff Schoolcomms user accounts. Access the Create Additional Users help guide [here](#).

## Delete 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 will need to be removed from the CSV file and once re-imported can be permanently deleted from Schoolcomms.

Access the Delete Leavers help guide [here](#).

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. Access the Groups help guide [here](#).

## 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. Access the Bank Accounts help guide [here](#).

## Payments

Amend existing or create new payment requests for the new academic year. See the Payment Requests help guide [here](#).

**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

For credit balances for leavers and other similar queries, access the Refunds help guide [here](#).

## Clubs

Amend existing or create new Clubs and connecting payment requests. Access the Clubs help guide [here](#). Add new students to Clubs and Payment requests once they have been imported after they have hit date of admission in your MIS.

## 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 hit date of admission in your MIS.

Access the Schoolcomms Dinners help guide [here](#).

A separate Dinner Plan with no charge would need to be created for FSM pupils.

UIFSM year groups will not be updated until your new file is imported following your Academic promotion being completed in your MIS.

## Text credits

Top up text credits to ensure that you have enough for the new academic year. Access the Ordering Text Credits help guide [here](#).

## Space usage

Archive messages and clean up the inbox.

Access the Archiving via the Web (Sent Items) help guide [here](#).

Access the Desktop Archiving help guide [here](#).

## 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 [here](#). Also see App/Payments invites in Messaging templates. Access the Full Parent Guide [here](#). Access the School Gateway help guide [here](#). Please remind parents to ensure that they are on the most recent version of School Gateway for the best user experience.

## FAQ and Hot Topics

Access a useful help guide for Frequently Asked Questions [here](#).

Access the Hot Topics [here](#).