

How to upload staff and visitors to ParentPay

MIS Sync

If you do not already have MIS Sync installed on your computer, it can be downloaded [here](#).

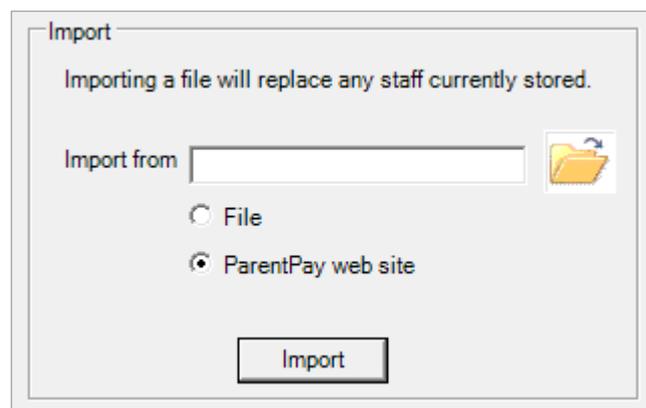
Guidance on the installation and configuration of MIS Sync can be found [here](#).

Initial upload of staff/visitors

To upload staff or visitor data to ParentPay for the first time, complete the following steps:

1. Open the MIS Sync program and log in
2. Select **Staff > Manage data** or **Visitors > Manage data**
3. Select **Import**. If this is your first upload, a message will be displayed reading *Nothing to import*. This is to ensure there are no records currently on the ParentPay system.

NOTE: If there are staff/visitor records already uploaded to your ParentPay site, a message will notify you of the number of records. Read *Uploading additional staff/visitor accounts* for guidance on how to manage this.



4. Select the **Manage** tab.
5. Enter the staff/visitor details. You will need to give each member of staff or visitor a unique ID number. ParentPay recommends using ID numbers in the format STF001 or VIS001.
A **Group** and **Sub Group** for each record will need to be entered. This is usually *Staff* or *Visitor* in both fields.

NOTE: If you have a cashless catering system, you will need to ensure the staff ID numbers match those already allocated on the till. If these ID numbers do not match, the staff/visitor accounts will not be picked up by the cashless system and payment/balance information will not be transferred between ParentPay and the till.

If you are unsure, ask your cashless provider to clarify if staff or visitor IDs need to be provided from the cashless till.

UID	Surname	Forename	Group	Sub group
STAFF001	Bell	Sue	STAFF	STAFF
STAFF002	Akers	Sara	STAFF	STAFF
STAFF003	Jenson	Paula	STAFF	STAFF
STAFF004	Hill	Kirstie	STAFF	STAFF
STAFF005	Travers	Lindsey	STAFF	STAFF
STAFF006	Tyrrell	Luke	STAFF	STAFF
STAFF007	Vickers	Shannon	STAFF	STAFF
STAFF008	O'Brian	Vicky	STAFF	STAFF
STAFF009	Carson	Kelly	STAFF	STAFF
STAFF010	James	Suzanne	STAFF	STAFF
STAFF011	Connell	Laura	STAFF	STAFF
STAFF012	Easton	Daniel	STAFF	STAFF
STAFF013	Redpath	Carole	STAFF	STAFF
STAFF014	Morris	Emma	STAFF	STAFF
STAFF015	Taylor	Sophie	STAFF	STAFF
STAFF016	Simons	Alison	STAFF	STAFF
STAFF017	Kingshott	Darren	STAFF	STAFF

- Once all staff or visitor records have been entered into MIS Sync, select **Save**
- The upload tab will open. Ensure the **Export to** option is set to **ParentPay Web Site**, and select **Export**.
- The data upload will then process. If it is successful, a message reading *Succeeded* will be displayed.

Import | Manage | Upload

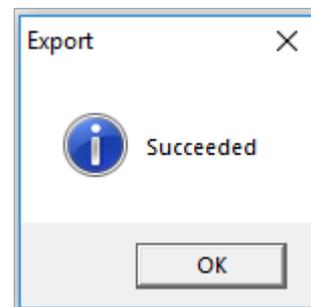
Export

Export to

File

ParentPay Web Site

Export



These records will have been sent directly to your ParentPay website and the staff/visitor details can be viewed in **People > Pupils and Staff** by changing the **Group 1** drop down menu to Staff or Visitors.

Activation letters can then be created for the staff members or visitors added to the site.

Uploading Staff data from an Excel Template

For those schools with lots of staff or visitors to input into the ParentPay system, you can create an Excel file containing the details rather than inputting them manually.

The required headers are as follows.

Staff uploads:

	A	B	C	D	E
1	Staff Identifier	Surname	ChosenName	YearGroup	ClassGroup
2					
3					
4					
5					

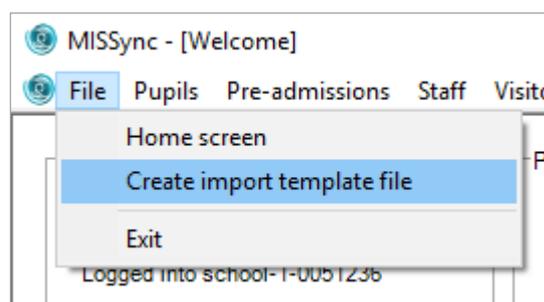
Visitor uploads:

	A	B	C	D	E
1	VisitorID	Surname	ChosenName	YearGroup	ClassGroup
2					
3					
4					
5					

The headers must be typed exactly as in these examples. If there are any differences, the data in the column will not be pulled through into MIS Sync.

NOTE: Remember that if you use a cashless till system the **Staff Identifier** or **VisitorID** needs to match the ID provided by the cashless till system.

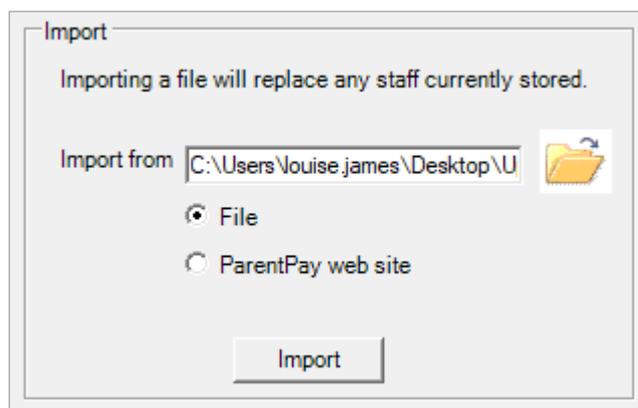
An Excel spreadsheet can be downloaded from within MIS Sync containing templates for all the different upload types. This can be accessed by selecting **File > Create import template file** in MIS Sync.



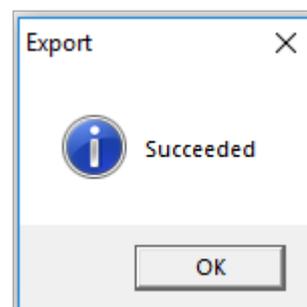
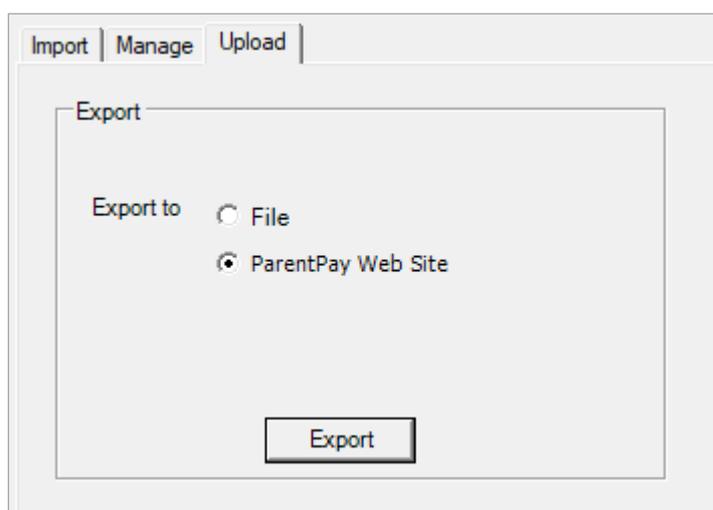
NOTE: The staff import template will contain a column for date of birth. It is not required to populate this column.

Once the Excel template has been populated with the required information, save the file to somewhere memorable on your computer, and close the document. The upload can then be completed.

1. Open the MIS Sync program and log in
2. Select **Staff > Manage data** or **Visitors > Manage data**
3. Ensure **File** is selected
4. Select the yellow folder to locate the file
5. Select **Import**
6. The data in the file will then be displayed in MIS Sync
7. Review the data displayed in MIS Sync, and select **Save**



8. The upload tab will open. Ensure the **Export to** option is set to **ParentPay Web Site**, and select **Export**.
9. The data upload will then process. If it is successful, a message reading *Succeeded* will be displayed.



These records will have been sent directly to your ParentPay website and the staff/visitor details can be viewed in **People > Pupils and Staff** by changing the **Group 1** drop down menu to Staff or Visitors.

Activation letters can then be created for the staff members or visitors added to the site.

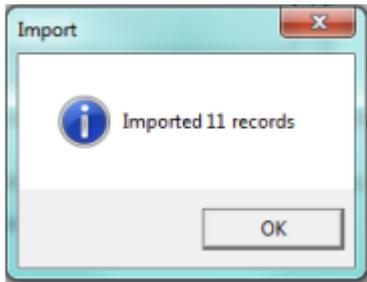
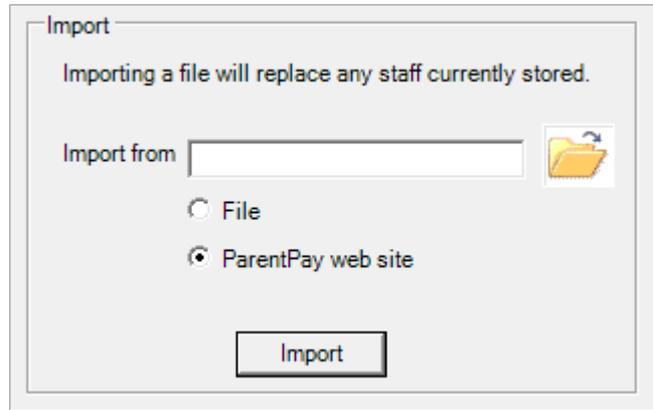
Uploading additional staff/visitor accounts to ParentPay

Any new staff members or visitors can be added to the ParentPay system using MIS Sync. It is also possible to make changes to the staff and visitor details (such as changing a name due to marriage) using this method.

WARNING: When adding new staff or visitors, you must also include any staff or visitors who are already on the ParentPay system in the upload.

If only the new members of staff or visitor records are processed in the upload, any records already held on the ParentPay system will be overwritten and archived. This will then prevent current staff or visitors from accessing their ParentPay account.

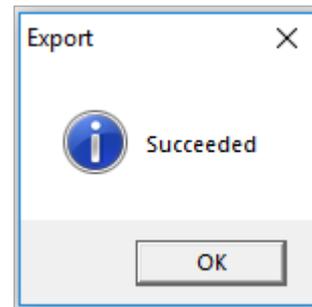
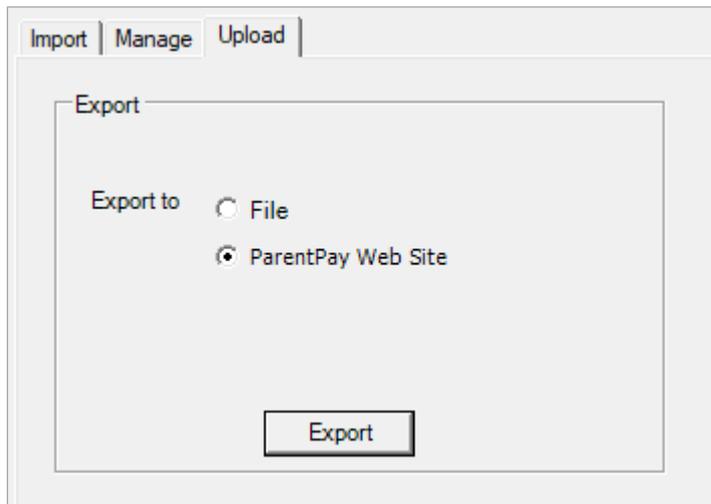
1. Open the MIS Sync program and log in
2. Select **Staff > Manage data** or **Visitors > Manage data**
3. Select **Import**.
4. You will receive a message stating how many existing records have been imported



5. Select **OK**. The **Manage** tab will be opened, and all staff or visitors currently held in the ParentPay system will be displayed. You can then add, amend, or delete records here

6. Select **Save**

7. The upload tab will open. Ensure the **Export to** option is set to **ParentPay Web Site**, and select **Export**.
8. The data upload will then process. If it is successful, a message reading *Succeeded* will be displayed.



These records will have been sent directly to your ParentPay website and the staff/visitor details can be viewed in **People > Pupils and Staff** by changing the **Group 1** drop down menu to Staff or Visitors.

Activation letters can then be created for the staff members or visitors added to the site.