








The page features abstract geometric lines in black and blue. In the top right, a black line descends from the top edge, and a blue line descends from the top edge, crossing the black line. In the bottom left, a black line descends from the left edge, and a blue line descends from the left edge, crossing the black line.

CHECKLIST

GUIDANCE FOR SWITCHING TO PARENTPAY

Guidance for switching to ParentPay



-  The school should check the terms of the current contract and consider any notice periods which might apply.
-  Make sure that you have saved any reports you need from the current payment system before it is decommissioned.
-  Update any references to the old payment system on the school website and other resources (eg parent's handbook). Add a link to the ParentPay login page to the school website.
-  If the school's current payment system requires a merchant account (eg WorldPay), then this will not be required with the new ParentPay system, and you won't need this, once ParentPay is in place.
-  The school should contact parents to advise them of the planned change to the payment system, and use the materials contained in the ParentPay Launch Pack to inform parents about the new ParentPay service.
-  If you have been collecting income via PayPoint with your current payment system, you should ensure that users return/dispose of any existing barcoded letters/cards, as these will not be recognized once the old payment system is switched off.
-  If the school is using the current payment system to settle dinner money direct to the caterer's bank account, they should contact the caterer to make them aware of the change. Dinner money collected using ParentPay can be settled direct to the caterer's bank account or to the school, as required. If the caterer's bank account is not already set up with ParentPay, we can send the link to the online form to confirm the details of the caterer's bank account and provide the caterer with central reporting for the catering revenue at each of its schools.

Guidance for switching to ParentPay



If the school is using a cashless catering system linked to the current payment service, they should contact the provider of the till system to advise of the switch to ParentPay. There may be charges made by the till provider associated with the change. ParentPay's Technical Team will confirm the date for the change with the school/till provider, and then support the till provider in making the change to the payment system. The student/staff account balances will be reported to ParentPay from the till system.



If the school is going to use the ParentPay Attendance Module/Meal Manager/Cypad Meal Selection to manage dinner money, then you can record starting balances in ParentPay to reflect any carried-over debts/credits. You should make sure that you are able to run a report showing the closing dinner money balances from the current system. Carried over balances can then be recorded in ParentPay under Finance>Record adjustments.



Likewise, if the school is using the Attendance Module to manage account balances for Breakfast/After-school clubs or Nursery, you can record starting balances in ParentPay. You should check that you can run a report showing the closing balances from the current system.



If the school is running trips which are midway through the payment plan, then it can set up the trip in ParentPay, as required, and record the money received to-date as account adjustments against each pupil. Parents can then pay the outstanding balances for the trip using the new ParentPay system.



Don't forget that ParentPay includes the Communication Centre which you can use for messaging parents by letter, email and SMS text, for announcing new trips, payment reminders, low-balance and debt reminders, as well as general messaging. You might want to make further savings by switching from the school's current messaging provider, and you should check the contract term and notice period before cancelling the current messaging contract.

Guidance for switching to ParentPay



If the school is using a Private Funds system such as Pebble Fund Manager, or Istek's Private Funds Manager, then these can be integrated with ParentPay. You should contact the provider of the system to confirm what is required to enable the link to ParentPay, and any associated charges for this.



If the school wants to link the new ParentPay service to a print management system such as Papercut or Pcounter, then it should contact the provider of the print management system to confirm what is required, and any charges associated with this.



If the school is a member of a MAT with a central Trust bank account which has been setup with the ParentPay Group Manager Application (GMA) for central reporting, then ParentPay will add the central Trust's bank account to the school's ParentPay service.

