SchoolMoney

Print this list and tick it off as you go along!

End of Year Checklist

We recommend running through the below checklist to ensure that you have fully prepared your **SchoolMoney** system for the new academic year. Some of these tasks can be carried out and the end of the Spring/Summer term to help you get a head start, whilst others will need to be actioned in September once the academic year has rolled over. For more information on how to compete these steps, please refer to our full **End of Year** guide.

Before September

- ☐ Do any of your leavers have credit that you need to refund/transfer to a sibling?
- ☐ Do any of your leavers have debts that you need to chase or clear?
- ☐ (If you do not use the Wonde, SIMS link, or Xporter) Have you sent CSV with all new pupil data?
- ☐ Have you removed any old Staff records that you will no longer need in September?
- ☐ Do you need to update your dinner menus?
- ☐ Do you need to update your bank details/BACS references?
- ☐ Have you archived any completed payments—have you removed/written off pupils from payments you are not expecting to be completed?
- ☐ Do you need any old users removing?

In September

- ☐ Have you ran your SIMS/Wonde/ Xporter link to update your pupil data?
- ☐ Do you need any new users creating?
- ☐ Have you added new Staff members onto your system?
- ☐ Have you updated your FSM entitlements?
- ☐ Have you checked that your UIFSM are showing correctly?
- ☐ Have you added your new pupils into your payments (e.g. dinners) so that they appear on the register?
- ☐ Have you added your pupils into any groups you have set up such as KS1 and KS2?
- ☐ Have you sent passwords to your new pupils?
- ☐ Have you set up new dinner/club weeks?
- ☐ Have your dinner/club costs changed?
- ☐ Have you set your payments live?
- ☐ Have you removed your Y6 from dinner registers?