



# Schools Cash Office

## Academic Year End Guide 2023

**Tucasi Customer Support**

**☎ 02380 016 564**

**✉ support@tucasi.com**



**Tucasi Ltd**

Wessex House Upper Market Street Eastleigh Hampshire SO50 9FD  
School Support - 02380 016564 Sales Team - 02380 016563  
www.tucasi.com

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Document Change History	
Date	Details of Change

## 1. About this guide

This guide will take you through setting up pupil and staff data in Schools Cash Office (SCO) ready for the new academic year. Not all sections/modules will be relevant to your school, but we recommend that you refer to each section of the guide and proceed with the required actions.

We offer a chargeable 1 hour service in July, August and September, to complete this process with you if you need assistance. Email [training@tucasi.com](mailto:training@tucasi.com) for further details.

Note that any references to Dinner money relate to the Dinner money module, not the Cashless catering link. If you are unsure which modules you are licensed for at your school, in SCO click on the **Admin** tab, then select **System status report**.

This guide relates to SCO version 2.5.31.0 and later – to check you are on the latest version, in SCO click on the **Income** tab, under the **Help** button the installed version is displayed. If your version starts with 2.4 or 2.5 but is an earlier version than 2.5.31.1, please refer to <http://www.tucasihelp.com/> for details on the latest upgrade. Ensure you update all PCs using SCO with the latest version.

If your version starts with 2.3, you cannot use this guide. In SCO at the bottom of the screen click on Guides & Documentation, scroll to the bottom of the screen and follow the instructions in guides 1, 2, and 3 in the ACADEMIC YEAR END GUIDES section.

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## 2. Schools Cash Office and GDPR compliance

As you will be aware, regulations came into place from 25th May 2018 relating to how personal data should be handled under the new GDPR guidelines. At Tucasi we have reviewed our processes and the SCO software to ensure that we are compliant with the new regulations.

We have distributed revised GDPR Contracts to all our customers which will act as an agreement to evidence that Tucasi have stated that they will only process your data in compliance with GDPR. This will also allow Tucasi to evidence that you have given Tucasi authority to process your data within the parameters of the Law.

GDPR requires us to remove data from the database beyond there being no legitimate basis for holding it. Therefore, we ask schools to take responsibility to use correct workflow/processes to keep themselves GDPR compliant.

This would mean, for example, ensuring pupils and staff who are no longer on roll at your school are deleted from the system in a timely manner, ideally during the academic year end process or soon after. Schools should ensure that completed school Trips are deleted in a timely manner during the academic or financial year end processes, as appropriate. The Banking screen should be cleared down during the academic or financial year end processes, as appropriate. This would apply even if you don't currently use SCO to reconcile with your bank account.

This document references processes to cover all the above requirements which we hope you will find useful.

You may also be interested in the Tucasi news article relating to GDPR which you can find here: [GDPR What This Means](#)

You can view the Tucasi Privacy Policy here: [Tucasi Privacy Policy](#)

If you have any queries regarding GDPR compliance, please email [operations@tucasi.com](mailto:operations@tucasi.com).

### 3. Set new term dates (Dinners and Extended day modules only)

If you do not use the Dinners or Extended day modules, *proceed to section 6.*

Enter new term dates and school holidays in the Dinners and/or Extended day modules, as follows:

**WARNING - Do not Change existing term dates – you should Add new term dates for the next year.**

#### 3.1 For Dinner money users

- Click on the **Dinners** tab (you must select this tab first to activate the following options)
- Click on the Configuration tab, select System options
- Under the **General** tab next to **Set up term dates** click **Set up**
- Scroll down to the bottom of the listed term dates, if necessary
- Click on **Add** and enter **School opens** and **School closes** dates
- Enter a Description such as **Autumn 1**
- Click on **Done**
- Repeat for each half term
- In the box below, enter any **Day Closures** for example **Training** or **Bank Holidays**
- Click on **Done**. Click on **Done**
- On the Dinners tab, click Settings, Term dates
- Check that the Term dates have been updated automatically. Click on **Done**

#### 3.2 For Dinner Money users with Extended day

- If using Extended day, click on the **Extended day** tab, click **Settings, Session dates**
- If you want to use the standard term dates added above, click **Merge standard term dates** at the bottom of the screen to update the session dates
- Repeat the above for each Club that you have set up
- If your Extended day clubs are open during the school holiday, enter the **School opens** and **School closes** dates as applicable for each club
- Day closures will appear as an **X** in the Dinner money and Extended day screens

#### 3.3 For Extended day users without the Dinner Money module

- Click on the **Extended day** tab, select the first club, click **Settings, Session dates**
- Scroll down to the bottom of the listed term dates, if necessary
- Click on **Add** and enter **School opens** and **School closes** dates
- Enter a Description such as **Autumn 1**
- Click on **Done**
- Repeat for each half term
- In the box below, enter any **Day Closures** for example **Training** or **Bank Holidays**
- Click on **Done**. Click on **Done**.
- Repeat the above for all clubs

*Proceed to next section*

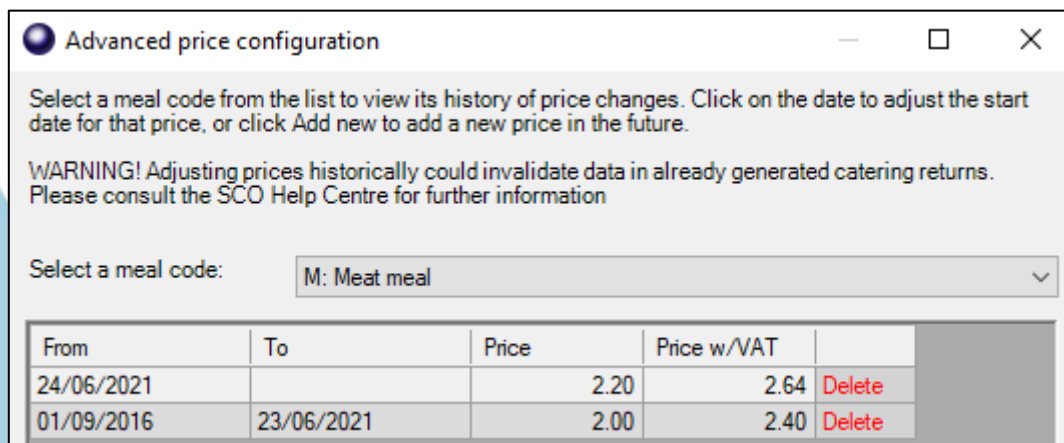
## 4. Update Dinner money prices (Dinners module only)

If your school has a meal price increase starting in September, follow the steps below, otherwise *proceed to section 6*.

- On the Configuration tab, select System options, select the Dinners/Extended day tab
- At the bottom of the screen, add a tick in **Allow meal price changes for dates before today**, click **Done**
- On the Dinners tab, select Settings, Meal codes
- Click Advanced price config
- Choose the appropriate meal code from the **Select a meal code** dropdown
- Make a note of the current **From** date and **Price** in case this is required later
- Click Add new

**Note:** this will position the previous price/s at the bottom of the list and enable a new **top line** for new pricing.

- Enter the required **From** date on the top line (this can be a date before today if you need to backdate meal prices)
- Leave the **To** date blank
- Enter the **Price** (pupil price)
- Enter the **Price w/VAT** (this is the price charged to adults and VAT is automatically calculated. This price can be overtyped if required)
- Change the **Select a meal code** dropdown to the next appropriate code
- Follow the above until all the codes have been amended



The screenshot shows a window titled "Advanced price configuration". It contains a dropdown menu for "Select a meal code:" with "M: Meat meal" selected. Below the dropdown is a table with columns: From, To, Price, Price w/VAT, and a "Delete" button. The table has two rows of data.

From	To	Price	Price w/VAT	
24/06/2021		2.20	2.64	Delete
01/09/2016	23/06/2021	2.00	2.40	Delete

- Click **Done**
- Click **Yes** to saving the changes

The new prices will be effective from the date you selected. You can test this by scrolling to that date in the **Dinners** tab and enter a code against a pupil or member of staff.


- On the Configuration tab, select System options, select the Dinners/Extended day tab
- At the bottom of the screen, untick **Allow meal price changes for dates before today**, click **Done** to prevent unauthorised changes being made in the future.

*Proceed to next section*

## 5. Update Extended day prices (Extended day module only)

If your school has a price increase for Extended day clubs starting in September, follow the steps below, otherwise *proceed to next section*

- On the Configuration tab, select System options
- Select the Dinners/Extended Day tab
- At the bottom of the screen, add a tick in **Allow meal price changes for dates before today**, click **Done**
- On the **Extended day** tab, select the relevant club
- Click on Settings, Session codes
- Click Advanced price config
- Choose the appropriate session code from the **Select a session code** dropdown
- Make a note of the current **From** date and **Price** in case this is required later
- Click **Add new**  
**Note:** this will position the previous price/s at the bottom of the list and enable a new top line for new pricing.
- Enter the required **From** date on the top line (this can be a date before today if you need to backdate session prices)
- Leave the **To** date blank
- Enter the **Price** (pupil price)
- Enter the **Price w/VAT** (this is the price charged to adults and VAT is automatically calculated. This price can be overtyped if required)
- Change the **Select a session code** dropdown to the next appropriate code
- Follow the above until all the codes have been amended



The screenshot shows a window titled "Advanced price configuration" with a close button. Below the title bar is a text box with instructions: "Select a session code from the list to view its history of price changes. Click on the date to adjust the start date for that price, or click Add new to add a new price in the future." Below this is a dropdown menu labeled "Select a session code:" with "S: Short Session" selected. At the bottom is a table with columns: From, To, Price, Price w/VAT, and a Delete button.

From	To	Price	Price w/VAT	
01/09/2021		3.30	3.96	Delete
16/02/2017	31/08/2021	3.00	3.60	Delete

- Click **Done**
- Click Close
- Repeat the above for each Club that you have set up
- The new prices will be effective from the date you have selected. You can test this by scrolling to that date in the **Extended day** club and enter a code against a pupil or member of staff
- On the Configuration tab, select System options, select the Dinners/Extended day tab
- At the bottom of the screen, untick **Allow meal price changes for dates before today**, click **Done** to prevent unauthorised changes being made in the future.

*Proceed to next section*

## 6. Check Account balances for pupils leaving the school (All schools)

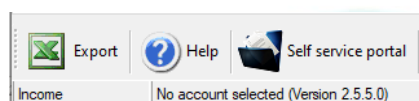
You will need to clear any Account balances for leavers (both credit and/or debit balances) to enable them to be removed from SCO. If you wish to leave balances to be handled at a later date, the pupils will be moved into a Leavers class during the end of year process.

NB You do not need to remove pupils from trips before deleting them from SCO.

To establish whether there are any pupils with accounts with a non-zero balance:

- In SCO, click on the **Accounts** tab
- Click on the **Year** column heading, this will sort the pupils by year group. Scroll to the year group that is leaving school. Scan the columns on the right to check for any pupils with balances

Export this screen to Excel, if required (use the **Export** button at the bottom left of the screen in SCO).



**Note:** The number of columns visible on the **Accounts** tab depends on the modules licensed in SCO at your school. The possibilities are Pre-pay bal, Cafeteria bal, Lettings bal, Dinner bal, Extended day clubs bal.

First name	Address	Class	Year	Status	Reg'd online?	Pupil ID	Pre-pay bal	Cafeteria bal	Dinner bal
Adrian	29 Napier Street, Bletchley, Milton Keynes, MK2 2NE.	11B	11		<input type="checkbox"/>	V820432103074	0.00	0.00	-84.00
Timota	The Moorings White City, Titchwell, King's Lynn, No...	11B	11		<input type="checkbox"/>	M820432103131	0.00	0.00	-84.00
Samanatha	49 New Street, Aberkenfig, Bridgend, CF32 9BL.	11B	11		<input type="checkbox"/>	W820432103200	0.00	0.00	-84.00
Lucy	3 Kimble Drive, Bedford, Bedfordshire, MK41 9TA,	11B	11		<input type="checkbox"/>	L820432103111	0.00	0.00	-124.00
Suzanne	48 Pont Pentre Caravan Park, Upper Boat, Pontypr...	11B	11		<input type="checkbox"/>	G820432103035	0.00	0.00	-116.00
William	48 Fairholme, Bedford, Bedfordshire, MK41 9DA,	11B	11		<input type="checkbox"/>	L820432104197	0.00	0.00	-86.00
Shona	48 Castle Hill, Huntingdon, Cambridgeshire, PE29 3...	11B	11		<input type="checkbox"/>	A820432103139	0.00	0.00	-82.00
Karen	52 Norse Road, Bedford, Bedfordshire, MK41 0NR,	11B	11	FSM	<input type="checkbox"/>	B820432104191	0.00	0.00	0.00
Catherine	30 Lythemere, Orton Malbome, Peterborough, PE2 ...	11B	11	FSM	<input type="checkbox"/>	B820432103190	0.00	0.00	0.00
Jaswinder	38B Whittlesey Road, March, Cambridgeshire, PE1...	11B	11	FSM	<input type="checkbox"/>	Y820432103211	0.00	0.00	0.00

If there are no account balances for Leavers, *proceed to section 10*

Otherwise, *proceed to next section*



## 7. Manage balances for Dinners/Extended day modules only

If there are no Dinner or Extended day balances for Leavers, *proceed to next section*.

If you wish to leave balances to be handled at a later date, the pupils will be moved into a Leavers class during the end of year process.

**Dinner or Club credit** balances for leavers can either be refunded back to the parent, transferred to a sibling's account or written off. See instructions below.

**Dinner or Club negative** debt balances should either be collected, transferred to a sibling or written off. See instructions below.

### 7.1 *Remove any meals or sessions entered for leavers beyond their leaving date*

Before you start handling credit or debit balances for Leavers, ensure there are no meal or session codes entered in advance (after the pupil's leaving date):

- In Dinners or Extended day click on **Reports**
- Click on the Statement Report
- Select **Custom** dates **From** the last day of term **Until** (for example) December 2021
- Select Only show pupils with debt
- Select the relevant **Class** or **Cohort**
- Generate the report
- Scan through to ensure there are no codes entered for the future. If there are, delete them in SCO before handling any balances

### 7.2 *Refund credit balances for dinners and extended day*

If your online payments are credited direct to your Local Authority or a Caterer, you will need to contact them to request the refunds to the parents' accounts, then record the refund in SCO as per section below.

If your online payments are linked to the VMS payment gateway, follow the relevant section below.

#### *a. To refund an online payment made via the VMS payment gateway VMS refunds must be made from SCO by locating the original transaction.*

- In SCO, go to the **Accounts** tab
- Double-click on the pupil's record
- Select the **transaction**
- Select the **Transaction Refunds** button  
Note that if the **Transaction Refunds** button is greyed out, it might be that the account is not school owned and permission has not been granted for refunds
- All items purchased on this transaction will be displayed
- Select the item(s) to refund
- The full amount will be refunded, unless you change the amount in the **To refund** box (you can refund part of the original transaction amount, but not a greater amount)
- In the **Reason** field enter narrative such as **School Leaver**
- Click on **Refund**
- The funds will be returned to the parent's card

### **b. To refund by cash or cheque in school**

- In SCO click on the appropriate module tab e.g. **Dinners** or **Extended day**
- Click on the red **Payment** button for the child with the credit balance
- Select the **Refund** option and the correct payment method (cash or cheque)
- The refund amount will automatically display
- Enter a Memo e.g. **Child has left school** (you can copy and paste this text for other refunds)
- Click **Confirm refund**, enter a reference when prompted if required
- Hand over the cash or cheque

*Proceed to next section*

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## **7.3 Write off credit or debt balances for Dinners and Extended day modules**

Writing off balances will not affect your Banking figures.

- In SCO click on the **Dinners or Extended day** tab
- Click on the **Payment** button, next to the relevant pupil
- Select Write off balance
- The amount is automatically entered and can't be altered
- Enter a Reason for write off click Confirm write off

*Proceed to next section*

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## **7.4 Transfer credit or debt balances for Dinners and Extended day to siblings**

Transferring balances will not affect your Banking figures.

- In SCO click on the **Dinners or Extended day** tab
- On the right hand side of the screen, click on the **Dinner money transfer or Pre-payment account transfer** button
- Click the down arrow and select the **From account**
- Click the drop down and select the **To account**
- Enter the **Amount**, if you are transferring a negative/owing amount ensure you put a - before the figure (e.g. -10.00)
- Click **OK**

*Proceed to next section*

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## 8. Manage balances for pre-payment accounts (All schools)

The General Pre-payment Account can be used to store pupil funds to pay for future purchases of items such as trips, uniform, etc. The pre-payment account can also be used to hold any refunds for re-allocation at a later date. The funds are held in a dedicated cost centre called School bank.

If there are no pre-payment account balances for Leavers on the **Accounts** tab, *proceed to section 9.*

If you wish to leave balances to be handled at a later date, the pupils will be moved into a Leavers class during the end of year process.

Any **Pre-pay bal credit** balances for pupils who have left school can either be refunded back to the parent, transferred to a sibling's account or written off. See instructions below.

Any **Pre-pay bal negative** balances will need to be collected or written off. See instructions below.

Class	Year	Status	Reg'd online?	Pupil ID	Pre-pay bal
11B	11	PP	<input checked="" type="checkbox"/>	1458	2.54
11B	11	PP, Gift aid	<input checked="" type="checkbox"/>	1410	15.00
11B	11	Gift aid	<input checked="" type="checkbox"/>	1484	-3.50

### 8.1 Refund credit pre-payment account balances

Note that this refund will affect your Banking figures

- In SCO click on the **Income** tab
- Select Account Rebate
- Select the appropriate pupil/staff account name from the drop-down list and click **OK**
- Select the General pre-payment account when prompted
- Click the appropriate **payment method** to complete the refund

### 8.2 Receive a payment for a pre-payment account debt

- In SCO click on the **Income** tab
- Click on the **Account deposit** button
- Select the pupil account to add the payment
- Click **OK**
- Click the down arrow and select the **General pre-payment account**
- Enter the **amount** to deposit
- Select the relevant **payment method** - cash or cheque

### 8.3 Transfer pre-payment account balances to siblings

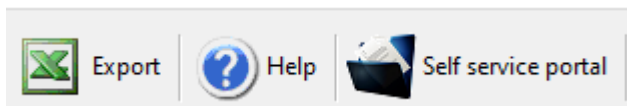
- In SCO click on the **Income** tab
- Click on the **Account transfer** button
- Click the down arrow and select **General pre-payment account**
- Click the down arrow and select the **From account**
- Click the drop down and select the **To account**

- Enter the **Amount**, if you are transferring a negative/owing amount ensure you put a - before the figure (eg -10.00)
- Click **OK**

## 8.4 Write off pre-payment account balances

You can write off the balance to allow deletion of the pupil. There is an audit trail of any write offs via the **Audit** tab, **Income and expenditure log** – they will display as **Account balance adjustments**.

If you didn't do so earlier, export your **Accounts** screen to Excel before commencing this section for your records, if required (use the **Export** button at the bottom left of the screen in SCO).



- In SCO click on the **Accounts** tab
- Right click on the **Pre-pay bal** column header
- Select **Enable set account balances** and click **Yes**
- The column will go yellow, you are able to change the relevant balances to zero. Be careful not to change any balances for non-leavers.
- Once you have amended the balances right-click on the header again and select **Disable set account balances**
- Select **Yes** to save the changes
- Click **OK**

*Proceed to next section*

## 9. Manage account balances for Cafeteria account (Cashless catering schools only)

If your school is using the Tucasi SCOPAY link with a cashless catering system (e.g. AMI, Cunninghams/IMPACT, CRB, Nationwide/NRS, Vericool, Sharp, Uniware, Live Register etc.), you might see balances for Leavers on the **Accounts** tab in the **Cafeteria bal** column.

If your school does not have a link with a cashless catering system, *proceed to section 10.*

If there are no cashless catering refunds due for leavers on the **Accounts** tab, *proceed to section 10.*

If you wish to delete leavers with a cashless catering balance without first issuing any refunds, proceed to section 10.

Class	Year	Status	Reg'd online?	Pupil ID	Pre-pay bal	Cafeteria bal
11B	11		<input checked="" type="checkbox"/>	1497	0.00	2.54
11B	11		<input checked="" type="checkbox"/>	1489	0.00	3.75
11B	11		<input checked="" type="checkbox"/>	1507	0.00	0.05
11B	11		<input checked="" type="checkbox"/>	1505	0.00	15.23
11B	11		<input checked="" type="checkbox"/>	1506	0.00	-0.10
11B	11		<input checked="" type="checkbox"/>	1486	0.00	0.00
11B	11	FSM, PP	<input checked="" type="checkbox"/>	1485	0.00	5.75
11B	11		<input checked="" type="checkbox"/>	1493	0.00	9.87

If you didn't do so earlier, export your **Accounts** screen to Excel before commencing this section for your records, if required (use the **Export** button at the bottom left of the screen in SCO).



### 9.1 To refund a cashless catering online payment made via the VMS payment gateway

Refunds for payments made via the VMS payment gateway **MUST** be done before the pupils are deleted from SCO.

- In SCO click on the **Accounts** tab
- Double-click on the pupil
- Double-click on the transaction to open it
- Select the **Transaction Refunds** button  
Note that if the **Transaction Refunds** button is greyed out, it might be that the account is not school owned and permission has not been granted for refunds
- All items purchased on this transaction will be displayed
- In the **To refund** box, enter the **amount** of Cashless catering to be refunded (you can refund part of the original transaction amount, but not a greater amount)
- In the **Reason** field enter narrative such as **School Leaver**
- Click on **Refund**

**IMPORTANT:** Note that refunds for cashless catering payments are not sent back to the cashless catering system, therefore you must carry out this next step to ensure the balances match on both systems.

- Update the pupil's balance on your cashless catering system
- The £0.00 balance will automatically update on the pupil's SCO and SCOPAY accounts after lunch

If you have already deleted the Leavers from the cashless catering system and there are still balances in SCO which you do not wish to refund or write off, you will have the option to remove Leavers in Schools Cash Office, despite them having Cafeteria balances. This is done later in the Academic Year End process.

If you have deleted pupils in error, you can easily restore them – see *section 24.*

Proceed to next section

## 10. Delete leavers via the Accounts tab

Now that you have cleared all balances for Leavers, if your Leavers are easily identifiable (in the same Class or Year group) you are able to delete them as one selection in the **Accounts** screen.

If they are not easily identifiable (e.g. if you have mixed classes or year groups, leavers over multiple years or 6<sup>th</sup> form), *proceed to next section* to import leaving dates and delete pupils automatically.

- In the **Accounts** screen, click on the **Class** or **Year** column heading to group the **Leavers** together
- Select the first pupil to highlight their account
- Hold down **SHIFT** (below Caps Lock) and select the last pupil to highlight all pupils in the range. *You can do this in small chunks if you prefer*

1047	Singh	Jaswinder	38B Whittlesey Road, March, Cambridgeshire, PE1...	11B	11	FSM
1048	Smith	Jean	26 The Terrace, North Pickenham, Swaffham, Norf...	11B	11	
1049	Stango	Giovanni	3 Northill Road, Cople, Bedford, Bedfordshire...			
1050	Stanley	Max	Green Ridges 87 Meadow Lane, Off...			
1051	Welsh	Karen	52 Norse Road, Bedford, Bedfordshire...			SM
1052	Yates	William	48 Fairholme, Bedford, Bedfordshire...			
1053	Ackton	Stan	86 Abey Path, Spalding, Lincs, PE11 1AY,	1B	1	UFSI
1054	Aloia	Paolo	4 Rhosdu Road, Wrexham, LL11 1EB,	1B	1	UFSI
1055	Baggley	Chris	22 Rushden Road, Sharnbrook, Bedford, Bedfordsh...	1B	1	UFSI
1056	Barr	Wendv	42 Union Street, Aberdeen, AB10 1BB,	1B	1	UFSI

- Right-click on the highlight and click on **Delete** (at this stage you can opt to **Keep** any pupils who have debts on trips which you may wish to chase prior to deletion)
- Right-click and **Delete** any other pupils who have left school throughout the year

If you have deleted pupils in error, you can easily restore them – see *section 24*.

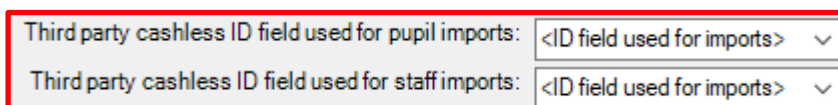
Proceed to next section

## 11. Check Import Settings (All schools)

### 11.1 Check the Pupil and Staff Third party cashless ID field

It is important to check the Third party cashless ID field settings, even if you are not using SCOPAY with a cashless catering system, otherwise an error message may be displayed when importing pupil data later.

- In SCO, click on the **Configuration** tab, select **System options**
- On the **General** tab ensure that
- Third party cashless ID field used for pupil imports is set to <ID field used for imports>
- Third party cashless ID field used for staff imports is set to <ID field used for imports>



Third party cashless ID field used for pupil imports: <ID field used for imports> ▾  
Third party cashless ID field used for staff imports: <ID field used for imports> ▾

- Click **Done**

*Note that if you are already using SCOPAY with your cashless catering system and your settings do not match the above, please talk to our Customer Support Team before changing any of these settings.*

### 11.2 Check Pupil IDs

It is important to check which ID you have previously used to import the pupils from your MIS (MIS = **Management Information System** e.g. SIMS, Progresso, CMIS, Scholarpack, Bromcom, Arbor, PupilAsset, Integris G2). You will need this information later in the process.

- Click the **Configuration** tab and select **System options**
- Make a note of the option selected in **Pupil ID field used for imports (Pupil ID, UPN or AdmissionNumber)**. Do not change the option already selected.

It is important that **ALL** pupils have an ID in SCO, otherwise duplicate pupil accounts may be created when importing new data. All IDs must be entered before you import.

- In SCO, click on the **Accounts** tab
- Click on the **Pupil ID** column heading to sort by ID. Any blank IDs will appear at the top. (You may need to click the heading twice for the blank IDs to appear at the top)

Last name	First name	Address	Class	Year	Status	Reg'd online?	Pupil ID
Ackton	Stan	86 Abey Path, Spalding, Lincs, PE11 1AY,	11B	11		<input type="checkbox"/>	
Aloia	Paolo	4 Rhosdu Road, Wrexham, LL11 1EB,	11B	11		<input type="checkbox"/>	
Baggley	Chris	22 Rushden Road, Sharnbrook, Bedford, Bedfordsh...	1B	1	UFSM	<input type="checkbox"/>	1236
Barr	Wendy	42 Union Street, Aberdeen, AB10 1BB,	1B	1	UFSM	<input type="checkbox"/>	1237
Bradbury	Christina	26 Oakfield Close, Downham Market, Norfolk, PE38...	1B	1	UFSM	<input type="checkbox"/>	1238

Pupils with missing IDs

If you have any pupils without IDs you will need to add them in as follows:

- Right-click on the pupil's name and click **Edit pupil details**
- Enter the ID in the **Pupil ID** field (this can be copied from your MIS pupil database)
- Click on **Done**

Please note that in SIMS, the ID field is only available to view for users who are part of the Third Party Reporting group. You may wish to contact your MIS support team for assistance on obtaining these IDs.

*If you deleted Leavers in the previous section, proceed to section 13, otherwise, proceed to next section.*

## 12. Import leaving dates (All schools)

If you are using the dynamic link to SIMS or Wonde, follow this section to see if the dynamic link is set up on your PC. If you are not using the dynamic link to SIMS or Wonde, proceed straight to section 12.1.

- In SCO, click on the **Configuration** tab
- Select Import from external system
- Select Import configuration
- Click on **Dynamic link configuration**. If the **Dynamic link status** indicates **Not configured**, *proceed to section 12.1*
- If the **Dynamic link status** indicates **Installed** and there are credentials in the **Login** section of this screen, click on **Cancel**
- In the **Data source** column, next to the **Leavers** heading ensure **SIMS dynamic link** or **Wonde** is selected
- In SCO, click on the **Admin** tab
- Select End of academic year, select Leavers import

### IMPORTANT:

This import **adds Leaving Dates** to any pupils who have been marked as Leavers in your MIS for the current academic year, but does not delete pupils. Pupils will be deleted later in the process.

The import screen may list ALL pupils in the **Pupils to be modified** column – this indicates that all pupils will be reviewed for a leaving date. Only those with a leaving date will be updated.

If using the Wonde link, leaving dates will only be imported for pupils who have been marked as a leaver in your MIS since the Wonde link was installed.

*Proceed to section 12.3 for instructions on deleting Leavers using the dynamic link.*

### 12.1 Create leaving data (schools without a dynamic link)

You will need to create a report containing the leaving dates for all pupils who left school either during or at the end of the academic year that has just finished. Contact your MIS support if you need assistance creating this report.

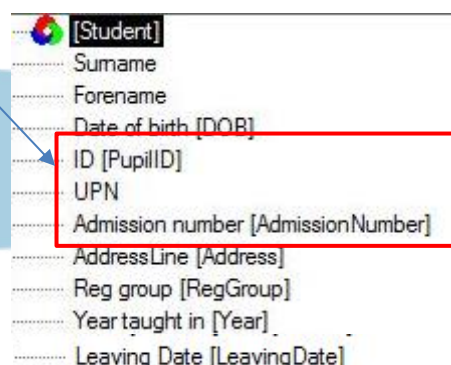
The report should contain the following **separate** fields with **identical field headings** to that shown below. A filter should be added to ensure that you only select pupils who have left during this academic year.

Forename	Surname	DOB	One of PupilID or AdmissionNumber or UPN	AddressLine	RegGroup	Year	LeavingDate
Benjamin	Able	01/01/2005	123456	45 Willow Way, AN1 2TW	11FC	11	26/07/2021

For the field containing the pupil IDs, select **only one** field - **UPN or PupilID or AdmissionNumber** as you noted earlier.

The report should be generated and saved (from Excel) as a **CSV (comma delimited)** file and saved to a location on your computer that you can access.

Ensure the **Leaving date** in your csv file is a date **before today's date** - the leavers cannot be deleted from SCO until the day after the leaving date at the earliest. If not, you can edit this date in the csv file if the pupils are no longer needed on SCO.





## 12.2 Import the leaving dates into Schools Cash Office

- Ensure the csv file created above has been closed, otherwise an error will be displayed on import
- In SCO, click on the **Admin** tab
- Select End of academic year, select Leavers import
- Browse and select the above csv file you saved on your computer
- A window will be displayed summarising the actions taken. Do not be alarmed if the screen lists all pupils in the **Pupils to be modified** column – this indicates that all pupils will be reviewed for a leaving date. Only those with a leaving date in the file above will be affected
- Click on the **Confirm** button. Click on **Close**

**NOTE:** this import **adds Leaving Dates** to any pupils who have been marked as Leavers in your MIS.

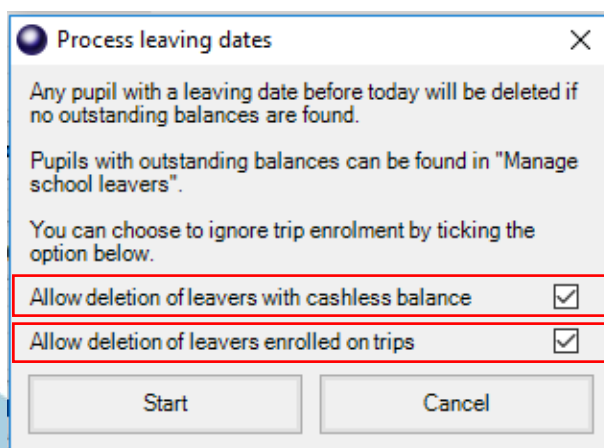
Proceed to section 12.3 for instructions on deleting Leavers.

## 12.3 Delete leavers (All schools)

In this step, you will delete all leavers with zero balances.

**If you need to refund any cashless catering balances, you MUST do so before deleting those leavers. See section 9**

- Ensure SCO is closed on all other PCs
- In **SCO**, click on the **Admin** tab
- Select End of academic year, click on Process leaving dates
- Select the option to **Allow deletion of leavers with cashless balance**  
This is applicable if you use the cashless link to a third party catering system (e.g. Cunninghams, Nationwide etc.) and if leavers have been deleted from the cashless system before any balances updated in SCO



- Select the option to **Allow deletion of leavers enrolled on trips**  
This is applicable if you no longer require pupils that have left to pay for debts on trips. Selecting this option will mean that parents of leavers will no longer be able to pay for trips online
- Click **Start** to delete the pupils - the leaving dates will be processed

**NB** If there are any pupils who have left but still have a balance, a box will appear with their details. These pupils will automatically be transferred to a class named **Leavers** and their balances can be handled later.

Click on the **Accounts** screen to check that the leavers have been removed.

Any leavers with outstanding balances will display as **Has Left** in the **Status** column on the **Accounts** tab. Such pupils will show on **SCOPAY** as (**Left school**) and **parents will no longer be able to pay online**. To allow parents to pay online, on the **Accounts** tab, **right-click the pupil, Edit pupil details**, remove the tick from **Pupil has left school**, click **Done**.

If the leavers have not been removed, ensure that they don't have any balances and that the **Leaving date** in your csv file is a date **before today's date** then repeat section 12.3.

If you have deleted pupils in error, you can easily restore them – see *section 24*.

*Proceed to section 13*

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## 13. Format Nursery class settings (schools with Nursery pupils only)

If you do not have Nursery pupils in your school *proceed to the next section*.

If you are going to import Nursery pupils into SCO and their Year Group in your MIS is marked as N1 or N2, you will need to import these as Year 15s in SCO.

To do this, simply change the **Default year group for imports** setting:

- Click on the **Configuration** tab
- Click on System options
- Enter the **Default year group for imports**: as **15**
- Click on **Done**

The screenshot shows the 'System options' configuration page. The 'Enter values for options:' section is active, with tabs for General, Receipts, Device, Income, Dinners/Extended Day, Communications, VAT/Tax, and Che. Under 'Options set across the system', various fields are visible, including School name, Unique school ID, Local authority ID, School first year group, School final year group, and School financial year start. The 'Default year group for imports' field is highlighted with a red box and contains the value '15'. A 'Set up' button is visible next to this field.

This will ensure that any pupils imported with a Year Group outside of 0-13, or a Year Group with an alphabetical character in the import file, will go into the Year 15 Year Group in SCO.

*Proceed to next section*

## 14. Update SCO with new academic year data (All schools)

If your school does not have the SIMS or Wonde dynamic link, *proceed to section 14.2.*

In this section you will import the data for the new academic year including new starters, existing pupils into their new classes and year groups/UFSM groups and Free school meal updates.

### 14.1 Schools with the SIMS or Wonde dynamic link

The SIMS or Wonde dynamic link will not import the new pupils into SCO until on or after the date they become **On roll**. If you have auto-import set then this will happen automatically on the first day of term. We therefore recommend that you carry out this process after that date, otherwise to import pre-admission pupils, refer to the separate guides:

[Import Pre-Admission Pupils \(any MIS\)](#)

[Import Pre-Admission Pupils \(SIMS only using Tucasi Pre-Admission report\)](#)

[Import Pre-Admission Pupils \(SIMS using csv\)](#)

[Import Pre-Admission Pupils \(Wonde Link\)](#)

Ensure you do not carry out this process until the leaving date for your leavers has passed, otherwise they may be imported again.

- In SCO, click on the **Admin** tab
- Select End of academic year
- Select Pupil import
- A **Data discrepancies** screen will appear to ensure no duplicates are imported

**Pupil account import confirmation**

Import will take place with the following settings. Please confirm, or cancel to select another import file

Import column	Pupil accounts to be modified	Data discrepancies
forename->First name surname->Last name addressline->Address date of birth->Birthday year group->Year reg group->Class name UPN->Pupil ID	Ackroyd, Ben (New) Alderson, Alex	Alderson, Alex duplicated

Preferences

- Allow blank pupil ID
- Merge with existing pupil without ID**
- Merge accounts with different ID
- Restore pupil if deleted

New account configuration

- Available online

Re-scan data

Cancel Confirm

**IMPORTANT:** if you previously imported Pre-admissions with blank Pupil IDs, tick **Merge with existing pupil without ID** and click on **Re-scan data**.

- Ensure that any pupils marked as (New) in the **Pupil accounts to be modified** section are new to the school. Scroll down this column to check that existing pupils are not marked as (New)
- Click on the **Confirm** button
- Click **Close**

Proceed to section 15

## 14.2 Schools without a dynamic link

This section will describe how to update your pupil data for the new academic year for new starters and existing pupils into new registration groups and other changed data. Contact your MIS support if you need assistance creating this report.

### a. Prepare a report to update pupil data

A report containing the following **separate** fields for all pupils needs to be generated and saved (from Excel) as a CSV (comma delimited) file.

**IMPORTANT:** the generated report **must** contain **all** the mandatory fields listed below **with exact field names as indicated**. You may need to manually rename or merge fields in Excel if your MIS does not automatically generate the required fields. For example, you may need to merge separate fields for “address” and “postcode” into an “AddressLine” field (search **Help** in Excel for instructions on how to **concatenate** fields).

**NB** The column label for the Pupil ID **MUST** match the Pupil ID field set for imports in SCO you wrote down earlier.

If you have previously imported pupil data, you may already have a report with the following fields saved in your MIS.

The required fields for the report **MUST** match the headings below:

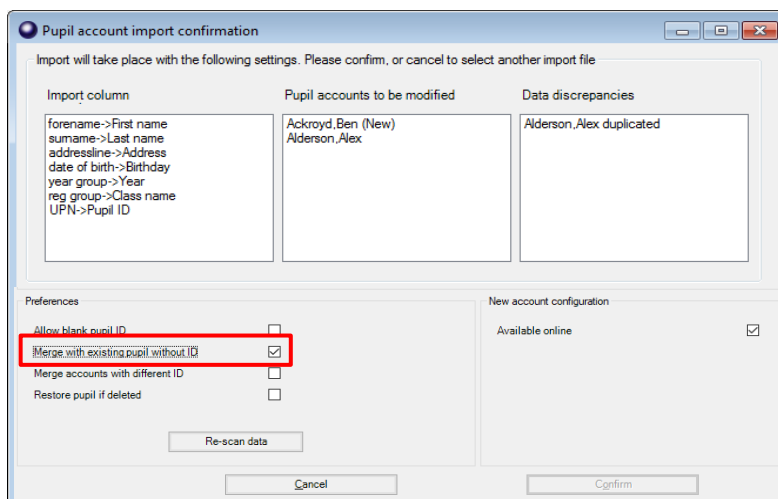
<b>Forename</b>	This is the first name of the pupil and can be legal or preferred name
<b>Surname</b>	This is the surname of the pupil and can be legal or preferred name
<b>Date of Birth</b>	This is the date of birth of the pupil
<b>Either UPN or PupilID or AdmissionNumber</b>	This is the pupil’s unique identifier and should match the Pupil ID field used for imports
<b>Year Taught In</b>	This is the pupil’s year group (0-13 or 15 for nursery)
<b>Reg Group</b>	This is the pupil’s class name
<b>AddressLine</b>	This is the address in one line separated by commas
<b>Eligible for Free Meals</b>	This is whether the pupil is eligible for FSM usually T(true) or F(false)
<b>Notes</b>	The Notes field often contains the pupil’s Dietary requirements
<b>PupilPremiumIndicator</b>	This is whether the pupil is eligible for Pupil Premium
<b>Gender</b>	This will indicate whether the pupil is male or female
<b>Salutation</b>	This will be how the parent(s) are addressed in a mail merged letter, email or text message

The report should be generated and saved (from Excel) as a **csv (comma delimited)** file and saved to a location on your computer that you can access.

### b. Import the data into Schools Cash Office

- In SCO, click on the **Admin** tab
- Select End of academic year
- Select Pupil import
- Browse and select the **SCO Pupil Data csv** file you saved
- A window will be displayed summarising the actions taken
- A **Data discrepancies** screen will appear to ensure no duplicates are imported

**IMPORTANT:** if you previously imported Pre-admissions with blank Pupil IDs, tick **Merge with existing pupil without ID** and click on **Re-scan data**.



- Ensure that any pupils marked as (New) in the **Pupil accounts to be modified** section are new to the school. Scroll down this column to check that existing pupils are not marked as (New)
- Click on the **Confirm** button.
- Click on **Close**
- Click on the **Accounts** tab and check that the leavers have been removed, new pupils imported and the remaining pupils are in their correct classes and year groups
- At the bottom left of the **Accounts** screen, below the **Help** button, check that the number of records matches the number of pupils on roll in your MIS

If any pupils have been duplicated, this can be handled later in section 23.

If you are using the Tucasi Communications module, *proceed to section 15*.

Otherwise, *proceed to section 16*

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## 15. Import Pupil Contact data (Schools using SCO Communications)

If you are not using the Tucasi SCO Communications module to send emails/texts *proceed to section 16*.

If you are using the Tucasi SCO Communications module, but your school does not have the SIMS or Wonde dynamic click *proceed to section 15.2*.

### 15.1 Schools with the SIMS or Wonde dynamic link

- In SCO, click on the **Configuration** tab
- Select Import from external system, select Pupil contact import
- Select Remove contacts no longer in import data to remove old contact data
- Review the details and click **Confirm**
- Once complete, click on the **Communications** tab, select **Account** contact report, select **All dates**, select **Show accounts with no contact**, click **OK**
- Review the data to ensure all contact details are displayed
- Close the report

*Proceed to section 16*

## 15.2 Pupil contact import – schools without a dynamic link

### a. Prepare the Pupil contact import data

Pupil contact details (mobile numbers and email addresses) can be imported into SCO by preparing a file in your MIS. If you have previously imported pupil contact data, you may already have a report with the following fields saved in your MIS. Contact your MIS support if you need assistance creating this report.

The required fields for the report **MUST** match the headings below:

Either <b>UPN</b> or <b>PupilID</b> or <b>AdmissionNumber</b>	This should match the Pupil ID field used for imports
<b>FirstName</b>	This is the contact first name, not the pupil
<b>LastName</b>	This is the contact last name, not the pupil
<b>MobileNumber</b>	This is the mobile number of the contact
<b>EmailAddress</b>	This is the email address of the contact
<b>PhoneNumber</b>	This is the phone number of the contact
<b>Priority</b>	This is the contact priority assigned to the contact
<b>ContactID</b> (optional)	ID of the Contact, although this field is optional
<b>ParentalResponsibility</b>	This field is optional

<b>PupilID</b> (or <i>UPN</i> , or <i>AdmissionNumber</i> )	<b>FirstName</b>	<b>LastName</b>	<b>MobileNumber</b>	<b>EmailAddress</b>	<b>PhoneNumber</b>	<b>Priority</b>	<b>ContactID*</b>	<b>ParentalResponsibility*</b>
D891212999295	James	McCaffrey	07700 900000	jmaccaffrey@example.co.uk	01234 567890	2	11061	F
D891293923212	Aimee	Grange	07700 900001	aimee@example.co.uk	01234 567891	3	11566	F
D891293923212	Joan	Scattered	07700 900008	joanscattered@example.co.uk	01234 567892	4	11567	F
H891212923225	James	McCaffrey	07700 900000	jmaccaffrey@example.co.uk	01234 567890	2	11061	F
L891293924228	Lorraine	Doctor	07700 900007	lorrainedoctor@example.com	01234 567894	1	11845	T
L891293924228	Neil	Doctor	07700 900004	neil@example.com	01234 567898	1	11846	T
R832351122229	Lorraine	Doctor	07700 900007	lorrainedoctor@example.com	01234 567894	1	11845	T
R832351122229	Neil	Doctor	07700 900009	neil@example.com	01234 567898	1	11846	T
X891212923226	James	McCaffrey	07700 900000	jmaccaffrey@example.co.uk	01234 567890	2	11061	F

The report should be generated and saved (from Excel) as a CSV (comma delimited) file and saved to a location on your computer that you can access. Ensure the file is closed before proceeding.

### b. Import the file into SCO

- In SCO, click on the Configuration tab, select Import from external system
- Select Pupil contact import
- Browse and select the **SCO Pupil Data csv** file you saved above
- Review the details and click **Confirm**
- Once complete, click on the Communications tab, select Account contact report, select All dates, select Show accounts with no contact, click OK
- Review the data to ensure all contact details are displayed.

*Proceed to next section*

## 16. Configure preferences (Dinner money and Extended day schools)

If you set default meal patterns for pupils (e.g. if they order in advance and you set Preferences in SCO) you will need to enter these for any new pupils.

If you do not use Preferences for Dinner money or Extended day, *proceed to section 17.*

### 16.1 Enter pupil preferences

- On the Configuration tab click on Account configuration, Pupils
- Select the pupil and click on the **Preferences** tab
- Enter **Preferences** for Dinners and any Extended day clubs
- Enter preferences for all new pupils and delete preferences for any pupils no longer required
- Click **Done**
- Click **Close**

### 16.2 Populate any meal or session choices for the future

- In Dinners, click on Set meal preferences
- Select the required options
- Click on **Done**
  
- In Extended day, click on Set session preferences
- Select the required options
- Click on **Done**
- Repeat for any other clubs

*Proceed to next section.*

---

## 17. Update any cohort pupil sets

If you do not use cohorts, proceed to next section.

- Click the **Configuration** tab
- Click Account configuration
- Click Cohorts
- Click the first cohort, add or remove pupils on the right hand side
- Repeat for other cohorts, click on **Done**

*Proceed to next section*

## 18. Delete empty classes (all schools)

After updating the pupil data, SCO may contain some 'empty' classes which can be deleted.

- Click the **Configuration** tab
- Click Account configuration
- Click **Classes** - empty classes will be displayed as having 0 pupils
- Click the empty class and select **Delete class**
- Click **Yes**
- Repeat for each class. Click **Done**

*Proceed to next section*

---

## 19. Add new staff (optional)

### 19.1 Add Staff Manually

If you have previously added staff manually repeat this to add any new staff

- Click on the **Configuration** tab
- Click Account configuration
- Click on **Staff**
- Select Add new staff
- The **Last name** and **First name** fields must be completed - other fields are optional
- Click on **Done**

### 19.2 Add Staff Using the Dynamic Link to Wonde or SIMS

If you have previously imported staff with Staff IDs or via the SIMS or Wonde link, repeat this process for new staff.

- Click on the **Configuration** tab
- Click Import from external system
- Click on Staff import
- On the import screen ensure only new staff are marked with [new] after their name, otherwise you will see duplicate staff.
- Click on **Confirm**

*Proceed to next section*



## 20. Delete staff that have left (All schools)

Staff that have left can be deleted from the system if they have no account balance.

- Click on the **Configuration** tab
- Click on Account configuration
- Click on **Staff**
- Click on the staff member to delete and select **Delete this staff**
- Click on **Yes**
- Repeat for each staff member
- Click on **Done**

*Proceed to next section*

---

## 21. Assign teachers to classes

(Dinner money, Extended day and Parents evening modules only)

If your school does not use the SCO Dinners, Extended Day or Parents evening modules, *proceed to next section*.

- Click on the **Configuration** tab
- Click Account configuration
- Click on **Classes**
- Click on the required class
- Click the down arrow next to **Teacher name** and select the appropriate teacher
- Repeat for each teacher, click on **Done**

*Proceed to next section*

---

## 22. SCO Dinner money startup class (Classroom edition module only)

If your school does not use the SCO Classroom Edition, *proceed to next section*.

If you are using the Classroom Edition and need to change the default class for each teacher, the teacher will need to login to Classroom Edition via [www.scopay.com/ClassroomWebapp](http://www.scopay.com/ClassroomWebapp) with their own email address and change the setting:

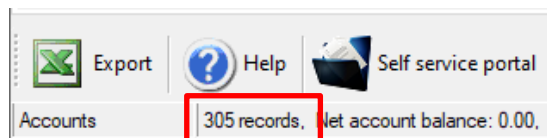
- Select Order meal for today
- Select **Control**
- Select Settings
- Click the down arrow next to **Show class on start-up:** and select the required class
- Click on **Save**

*Proceed to next section*

## 23. Manage duplicate pupils (All schools)

Duplicate pupils occur when a pupil does not have a Pupil ID in SCO or a different Pupil ID was used when new pupil data was imported.

At the bottom left of the **Accounts** screen, below the **Help** button, check that the number of records matches the number of pupils on roll in your MIS.



It is possible to view duplicate pupils by clicking on the **Accounts** tab:

Account no	Last name	First name	Address	Class	Year	Status	Reg'd online?	Pupil ID
1002	Able	Benjamin	45 Willow Way,Port Talbot,SA12 8TP.	10B	10	FSM, Gift aid	<input type="checkbox"/>	V820444405031
1228	Ackroyd	Marc	27 Springfield Avenue,Kempston,Bedford,Bedford...	8B	8		<input checked="" type="checkbox"/>	T820200100036
1229	Ackroyd	Mary	27 Springfield Avenue,Kempston,Bedford,Bedford...	8B	8		<input checked="" type="checkbox"/>	L820200100003
1325	Ackroyd	Mary	27 Springfield Avenue,	8B	8		<input type="checkbox"/>	006543
1053	Ackton	Stan	86 Abey Path,Spalding,Lincs,PE11 1AY.	1B	1	UFSM	<input type="checkbox"/>	M820200105001
1277	Adams	James	133 Armstrong Drive,Bedford,Beds,MK42 9JW.	Rece...			<input type="checkbox"/>	X820432105002
1253	Akram	Amina	128 Marton Road,Mulbarton,EAST TOWN,Eastsh...	9B	9		<input type="checkbox"/>	T820444405020

We advise you **not to use** SCO until you have sorted out any duplicate pupils.

If there are no duplicate pupils, *proceed to section 24.*

- Check the type of **Pupil ID** in SCO
- Click the **Configuration** tab and select **System options**
- Make a note of the option selected in **Pupil ID field used for imports**
- You must ensure that all pupils retained have the same Pupil ID type (e.g. Pupil ID, Admission Number or UPN)

### 23.1 Deciding which duplicate account to retain

#### a. Has the parent registered online?

For schools who have the SCO Online Payment module (SCOPAY) you **must** check that the pupil you wish to delete isn't already linked up with a registered parent online.

- Click on the **Accounts** tab
- Check the **Reg'd online?** column
- Retain the pupil account that has a tick in the box

#### b. Which account has recent transactions against it?

- Click on the **Accounts** tab
- Double-click on the pupil account. An account statement will be displayed
- If no transactions have been entered against either of the duplicated pupils and you **DO NOT** have the **SCO Online Payment module**, retain the pupil with the correct Pupil ID

## 23.2 How to move the correct ID from one duplicate to another:

If you need to retain the pupil without the correct Pupil ID, you will need to transfer the Pupil ID as follows:

- Right-click on the pupil **with** the allocated Pupil ID, click on **Edit pupil details**
- Highlight the **Pupil ID**, cut the Pupil ID (Ctrl X or right-click and select Cut)
- Click on **Done**
- Right-click on the pupil **without** the correct Pupil ID, click on **Edit pupil details**
- **Paste** the Pupil ID (Ctrl V or right-click and select Paste)
- Click on **Done**
- Repeat for each duplicate pupil and ensure the Pupil ID is of the correct type

## 23.3 Delete Duplicate pupils

Once you have identified which pupils to delete, you can delete them via the **Accounts** tab:

- **Right click** on the pupil's name
- Click on **Delete**, click on **OK**

At the bottom left of the **Accounts** screen, below the **Help** button, check that the number of records matches the number of pupils on roll in your MIS.

*Proceed to next section*

## 24. Restore deleted pupils

If pupils have been deleted in error, you can easily restore them:

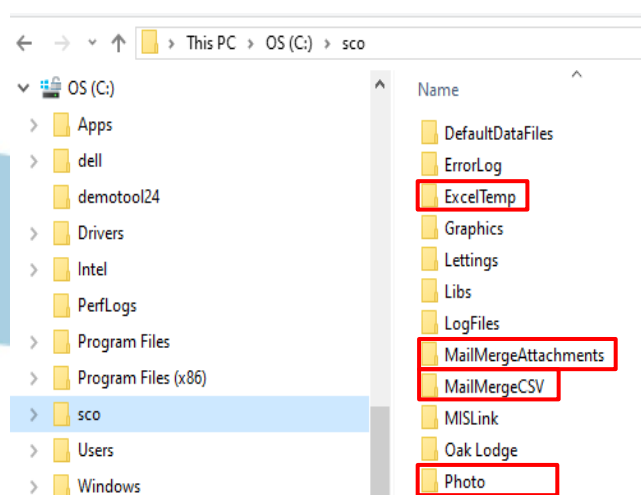
- Click on the **Admin** tab
- Click on Database management
- Click on Restore deleted data
- Click on **Pupils**
- Select the relevant pupils to restore, click on **Done**

*Proceed to next section*

## 25. Delete old data files

The Data Protection Act 2018 requires data to be removed beyond there being no legitimate basis for holding it. Therefore, schools should take responsibility to use correct workflow/processes to keep themselves compliant.

We recommend that you review the contents of the 4 folders highlighted on your local C Drive/sco folder. SCO uses these folders to place temporary files used during the generation of mail merge data. Repeat this review on all PCs with SCO installed.



## 26. Delete old Trips, products and Cost centres

This can be done at a later date, if required.

Refer to the relevant sections in the SCO Help Centre:

[Delete Trips and Events](#)

[Delete Products and Groups](#)

[Delete Cost Centres](#)

We offer a chargeable service to complete this process with you if you need assistance.

Email [training@tucasi.com](mailto:training@tucasi.com) for further details.

Proceed to next section

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## 27. Documentation and Support

Congratulations! You have now completed the Academic year end process and SCO is now ready to use for the new academic year. If you have any queries, please contact:



### Tucasi Customer Support

 **02380 016 564**

 **support@tucasi.com**

In **SCO** click on [Guides & Documentation](#)

*To import pupils marked as Pre-admission in your MIS:*  
Refer to the guide **How To Import PreAdmission Pupils**

*To carry out the Financial Year End Process,  
including archiving trips and reconciling the Banking:*  
Refer to the guide **Financial Year End Guide**

*To change which items are available online and  
generate Online access letters for new starters:*  
Refer to the guide **Quick Reference Guide Online Payments**