End of Year To-Do Lists

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Some or all of the children are leaving

1. Download their data

Once you are sure you don't need or want to add any new observations, it is time to export the data to share with parents or for you to keep. You may consider exporting:

a. A **PDF copy of each child's journal*** and reports (optional)
b. A **ZIP file with all their media**
c. **Accident records**
d. Any, or all, of their monitoring screens (in 'Tracking') by clicking on the CSV/PDF buttons on each monitoring screen
e. Any **Booking**, **Invoice** and **Register** data you wish to keep

Don't forget, parents can now get a copy of their child's journal **professionally printed with this option!*

2. Transfer to another Tapestry package

Sometimes your children will start at a setting or school that also uses Tapestry. On those occasions, you can simply transfer their profiles – note that transfers can only contain Observations, Reports, relatives and assessments (including Areas of Concern judgements and bespoke framework assessments and flags used).

3. Deleting vs Deactivating

When you delete a child you will have a period of **90 days** during which you can restore them to access their full account. You are also able to download a PDF copy of their journal whilst they are awaiting deletion. Our **contract with you** outlines what happens to the data when a child is deleted.

If you want to keep records of Booking data (including Invoices and Registers), then you can make the children **inactive** for now. We'll have a more permanent solution for this in due course, but once that solution is available, do consider **deleting** those children.

If you deactivate a child, they will remain in your account indefinitely and you will be able to restore their profiles to access their data. When deactivating a child, it is important that you only keep the data as long as you have a lawful reason for doing so **as per your Data Protection policy** and therefore you should periodically review and delete any inactive records that are no longer required. In some cases you may be obliged to retain certain data, e.g. accident records, but for those instances we have made it possible to export the information into PDF files, which you can produce before the child leaves your setting.

4. Delete Relatives

Don't forget to wait until all relatives have downloaded their children's journals and/or media. Learning journal downloads are available to relatives for **90 days** after being created, and ZIP files of photos and videos for **28 days**. However, their child does **not** need to still be active once those downloads are generated; as long as the relative account remains open, they can access the download even if their child is deleted.

Some or all of the children are staying **2**

1. Manage groups

Depending on how your account is organised, you might want to rename and edit your custom groups. E.g. if you have a Nursery group and a Reception group, you could rename the Nursery group to Reception and add a new Nursery group for your new starters.

2. Manage key children

Key workers might change from one year to another, so do remember to review and update these.

Remember: Groups and Key Children do **not** influence one another; if you remove a child from a group, you may need to change who their Key Person is too.

3. If you have more than one account:

- **Transfer children between packages**

OR

- **Rename your packages**

Please refer to the *'I have separate packages for my children, how should I organise them at the end of the academic year?'* to-do list **(Page 5)**.

4. If you want to, for the children that are staying with you, you can:

a. **Download a PDF journal** for relatives for the academic year just gone*
b. **Download a ZIP media file** for relatives for the academic year just gone
c. Download their **Booking**, **Invoice** and **Register** data
d. Update their **About Me page** - has any of their information changed?
e. Export their **Accident records** and Monitoring Screens (PDF/CSV)

*Don't forget, parents can now get a copy of their child's journal **professionally printed** with this option!*

5. If you are moving children to Y1 or within KS1/KS2 years:

You'll need to **set a new MAP** for each child. This is a collaborative job between the previous and new teacher.

6. Child login page setup

If you use the Child Login feature, you might need to review which groups/children have this set up, and update them accordingly.

a. **Setting up a login page for groups of children**
b. **Set user permissions for children**

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New children are joining

1. **Get permission from relatives to get their children set up on Tapestry**

2. **Add children in bulk** or **individually** as:

a. Enrolling

This status allows you to create profiles for new children before your existing children have moved. You have space for as many Enrolling children as you do Active children, and you are able to:

- **Fill in their About Me page**
- **Create labels for them**
- **Organise them into groups**
- Add their relatives and link them **(see Step 9)**
- **Add Memos to share information with their relatives**
- Set them up on Tapestry's Management System **(see Steps 11-14)**

You are not able to:

- Link them to posts (other than Memos)
- Use the monitoring screens for them

b. Active

You can have as many active children as you have available spaces. If you need to upgrade or downgrade your package, please email: **customer.service@eyfs.info**

3. Transfer children in

If you have children coming from a setting or school that also uses Tapestry, you can get the children's profiles transferred in so you can continue adding on to these. Note that the About Me and Care Diary information will **not** get transferred. The children will arrive as 'Enrolling' and the sending setting can also include their relatives, so once you have received them, you will need to:

    a. **Activate the children**
    b. **Manage the transferred relatives**

4. **Manage groups** - create new groups or amend existing ones.

5. **Manage key children** - link the new children to their key workers

6. **Upload profile pictures**

7. **Create name labels**

8. **Fill in All About Me** - you can ask families to do this for you!

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New children are joining - Cont.

9. If they haven't been transferred in with their children, you will need to **add the new children's relatives**.
   a. **Add them individually** or **in bulk**
   b. **Link them to their children**
   c. **Review the user permissions for relatives** and edit them if necessary

10. **Child login page setups**

If you use the Child Login feature, you might need to review which groups/children have this set up, and update these or create new groups accordingly. You will also need to review the **child user permissions**.

If you are using Tapestry's Management Tools

11. **Configure your account (new management users)**

If you've never used the management tools on Tapestry before, you will need to configure your account first, so that Tapestry knows when your setting is open, what sessions you have and what you charge.

This video playlist can guide you through how to do this, but Tapestry will also take you through these steps when you open the 'Booking' section for the first time. You can return to this to-do list once you have configured your account.

12. **Create children's Regular Schedules**

You can create Regular Schedules for children who are active or enrolling. You can choose which of your sessions each child will attend and when, and when they will start. You can also add any regular extra charges to this schedule.

Remember: you will be able to add **ad-hoc sessions**, **absences** and **extra charges** during the child's time with you. This part is about setting up when they will normally attend.

13. **Tell parents you are using Tapestry for your invoices**

If you need it, we have a template letter you can use **on our website**. You can send this to parents directly, or send it to all parents via Tapestry using a **Memo**.

14. **Choose a child's bill payer** and **add their billing information**

You can do this once you have added and linked a child's relatives to Tapestry, as per **Step 9** in this to-do list. By choosing a bill payer for each child, you are telling Tapestry who it should send invoices to once you have generated and approved them.

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The End of the Academic Year Tapestry To-do list

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Managing your Tapestry subscription

At the end of each academic year, you might need to take a look at your subscription and make any changes as required, so your package – or packages – are ready for the new academic year.

N.B. If you need to contact us at any point, please make sure that you do so from the registered FSF account holder's email address (where your invoices are sent), or from any email address registered as a 'Manager' in Tapestry.

1. FSF account holder

All Tapestry packages are administered from the FSF account. The FSF associated email we have on record will receive all invoice notifications, and will be able to log in to the FSF account and access, amend, download and make payment for these directly from the FSF. **You can change this if you need to**.

Please make sure this is up to date by going to Control Panel > Overview, and if you need to make any changes and you are not able to make them from within the setting/school, contact us at **customer.service@eyfs.info** so we can assist you with this.

2. Package size changes

It's possible that you'll find yourself needing to upgrade or downgrade your package size according to your new numbers. If you need to change your package size, contact **customer.service@eyfs.info** so we can help you.

3. **Check and update your setting/school contact details**

You might have changed your email handle, or the person in charge might have left. Either way, it is always good practice to check and update your contact details for both us (Tapestry) and your families.

4. **Term dates**

Check your specified term dates and make any changes now, before the new children arrive.

5. Staffing changes

Staff can come and go, so every end of the academic year (or whenever the staffing changes happen!), you'll need to:

   a. Add new staff either **individually** or **in bulk**
   b. **Delete staff** either individually or in bulk
   c. **Change staff type** – this could mean upgrading some staff to managers, or changing their type from PIN only to full staff
   d. **Review your staff user permissions**, and edit them if necessary

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