

From the Directors' Desks - June 2017

Welcome to Term 2 of what is turning out to be an exciting and extremely busy year.

Achieving successful startups for new edge and Xero schools is always a prime focus for the S&S team in Term 1, and the completion of over 250 annual accounts for audit keeps a growing financial services team right on task. They miss a lot of the summer with long hours due to the tight timeframes to meet statutory deadlines.

With a continually growing team based in Christchurch and around the South Island we are well set up to provide schools with a total administration support service. We look forward to seeing you at several conferences coming up (see page 5) and S&S regional Roadshows planned for Term 3 / 4. These will be announced soon through our new website – about to be released mid-June.

Our focus for Term 2 is showcasing Monty – the S&S Xero add-on, and assisting a rapidly increasing number of schools to access the ease and power of the two products perfect for schools – Xero + Monty. Combined with the edge student management system and edge library manager there is now a fully integrated suite and great development occurring in all these systems.

We firmly believe in having the right software products, a practical focus to the development to make life in schools easier, and a supportive team with a personal interest in the school users we assist. Easily accessed remote or onsite training help is the answer. This has been proven by our long involvement in schools and continued growth.

In 2018 Solutions and Services will proudly celebrate 25 years in business and will take the opportunity to thank you for your wonderful support. Parties are to be planned!



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The answer for school financial management = Xero + Monty



Life at Rose Street just wasn't quite the same without our terrier, Monty so we branded him in our Xero add-on and true to form, Monty is taking off. Monty is proving to be very popular providing complete budgeting and reporting specifically tailored for New Zealand schools. Like Xero, the programme exists in the cloud so you can take Monty anywhere with you.

- So easy to use for faster data entry, reconciliation, payments, invoices
- Cloud based - online 24/7 access anywhere / anytime
- Almost makes school accounts fun!
- Monty provides easy budget entry and enables balance sheet budgets
- Monty provides easy governance and management reporting
- Monty enables emailed reporting to school budgetholders
- Easy transition from other accounting software & systems
- Set up and support from experienced NZ school finance team
- S&S tipsheets online within our Xero library setup and Monty

The simplicity of generating reports in Monty and providing budget holders the information they require each month via email has certainly increased efficiency for all facets of school life. The detail available in reports provides the Management Team and BOT with the ability to make informed decisions. - Leanne McLeod, Finance Officer, East Otago High School

Our School has been using the Xero programme for around 3 years now and the limited reporting has meant a lot of extra work each month to collate the information into a presentable format which aligns to the Kiwipark model.

Having Monty has meant I can just push a button on month end reports without any hassles. I am confident the information being presented to our Board of Trustees meets all their requirements as well as audit standards.

I would highly recommend you take a look at this for your school.

- Kate Bond, Business Manager, Ashburton Borough School



The ultimate answer for school administration = edge + Xero + Monty

- The easiest integration from edge student finances to Xero
- Streamline your administration systems
- Making it easier for teachers and administrators
- Cloud based - online 24/7 access anywhere / anytime
- Capture the power of mobile access for edge and Xero
- Experienced set up and support from NZ school education trainers



WHEN DISASTER STRIKES....

Recent natural disasters remind us that they can strike at any time and we all need to be prepared. The MUSAC team reminded its edgeSMS clients the procedures for closing a school (this can still be read under the edge Announcements widget on the dashboard) but it's timely to remember what the Ministry of Education has to say about closing a school. The following comes from [the Ministry](#) website.

Your school may close from time to time for the following reasons:

- *Teacher preparation, teacher only days and local events: Your school may close for teacher only days, local gala or show days, and in-service training days. As your school is not open for teaching children on those days, you must ensure that you make up these days to meet the required total number of half days for the year.*
- *Closing your school in an emergency: Your school may need to close at any time because of an epidemic, flood, fire, earthquake or other emergency. You do not need to get permission from the Ministry of Education to close a school in an emergency, but please tell your local Ministry office of the closure.*

If the emergency means that your school will not be open for the required number of half days, you will need to apply for approval to reduce the number of half days. Contact the Director of Education at your nearest Ministry of Education office to help you with this application. Emergencies do not include paid union meetings or strikes.

The [School Building Insurance Funding Programme](#) covers repairs for damage caused by:

- fire
- water – from a sudden problem including a burst pipe or sprinkler
- earthquakes, including events that happen following an earthquake, such as fire or a tsunami
- extreme weather like storms, heavy snow, gales, lightning strikes and floods
- lost or stolen keys (up to \$50,000).

The Emergency Response Co-ordinator for the South Island is Tony Haswell of School Support Limited. School Support will maintain a 24 hour, 7 days a week service to manage emergency calls in the event of an unforeseen incident affecting school buildings. The contact details are tony.haswell@schoolsupport.co.nz, telephone 0800 111 775.

The emergency response coordinator:

- *coordinates the response effort with emergency services*
- *does an inspection and arranges any urgent work to get the school functioning as quickly as possible*
- *organises emergency accommodation, security and safety at the school, if needed*
- *prepares the scope of work in liaison with you, your project manager, property advisor and loss adjuster.*

Schools should also consider having some prearranged contractors for afterhours call outs for urgent repairs.

Each school's board of trustees is responsible for arranging contents insurance.

There is a Ministry Traumatic Incident Team which can help when events disrupt a school, whether they be environmental or interpersonal. The Ministry of Education has also published [Traumatic incidents: managing student and staff wellbeing—a guide for school crisis management teams](#).

Resources for teaching kids about disasters and guidelines on civil defence planning for schools.



Keeping your asset register up to date

Your Fixed Asset Register is only as good as the information it has recorded. Therefore, it is important for schools to provide Solutions and Services with sufficient detail in order to keep your school records up to date. As invoices vary vastly in the amount of detail provided for items purchased, we recommend that a copy of our Fixed Asset Addition Form is attached to each Fixed Asset invoice, and that these are sent through to us as they are paid throughout the year. A copy of our Fixed Asset Additions Form is attached to the email that this newsletter was sent with, and is also available to download from our website at: www.solutionsandservices.co.nz.

Please remember that this excludes Library Book purchases, for which we don't require invoices at all, only our library information sheet completed at year end.

Equally important is an Annual Review of the Fixed Asset Register, using this opportunity to ensure that any items that are broken, no longer in use/in the possession of the school, or sold on etc., are disposed from the Fixed Asset Register. A full list of active assets will be sent to each school, along with instructions to help initiate this year's review.

Should you have questions or require assistance, the assets team can be reached by emailing us at assets@solutionsandservices.co.nz

Mary Gavin QSO

We were delighted to see Mary Gavin honoured in the recent Queen's Birthday Honours list.

Mary has contracted to Solutions and Services for over twenty years, as a library specialist and supporting schools in the upper part of the South Island with MUSAC student management systems.

Her citation reads—*For services to women and the community*

Mrs Mary Gavin has been an advocate for gender equality for more than 40 years and has held many leadership roles with the National Council of Women of New Zealand (NCWNZ), including terms as a National Board member and Public Issues Standing Committee Convenor.

Locally Mrs Gavin has represented the Federation of Graduate Women (NZFGW) at the Nelson branch of NCWNZ and has taken responsibility in all Branch office roles for various terms as well as representing NCWNZ on external committees. She has done extensive work at branch and national level for constitutional and communication reforms including initiatives for contemporary management structures and in NGO reporting to CEDAW (Convention on the Elimination of all forms of Discrimination Against Women). Other voluntary community leadership roles over many years in Nelson have been in heritage, education and social wellbeing areas. Mrs Gavin is the Chair of the Broadgreen Historic House Society, Deputy Chair of Nelson Civic Trust, a Life member of SPELD (Specific Learning Difficulties Association) and a former Board member of Nelson Women's Refuge and the Nelson Heritage Protection Trust.



edgeLM

edgeLM continues to be popular with schools wanting a cloud-based product. Gone are the days of the-library-computer as people are able to access both the library catalogue and its circulation functions on any computer. Every borrower can have their own login to search the catalogue and see which books they have got out, both in the past and present while library assistants have the additional ability to issue, return and renew books. Librarians have full access to the site, to maintain the catalogue and its users.

The most popular feature of edgeLM with librarians is its rapid catalogue function. Once a school is subscribed to SCIS or National Library with a z39.50 connection, librarians only need to enter the ISBN and the cataloguing information is instantly pulled through, along with a book cover image if it is available. An additional benefit for schools using both edgeSMS and edgeLM is that the programmes can be sync'ed - no more adding students as library users, edgeLM does it for you overnight. Librarians can choose whether or not they want leavers to be automatically deleted.

Solutions and Services support edgeLM in the South Island and we are happy to give interested parties a demonstration of this software. Our edgeLM experts are Mary and Belinda. A short video demonstrating its capabilities is available at <https://youtu.be/1b7cSzQDBts>

Introducing Bohally Intermediate School

Bohally Intermediate School is a school of 422 students situated in sunny Blenheim. Named for the farm which previously occupied the site, Bohally opened in 1956.

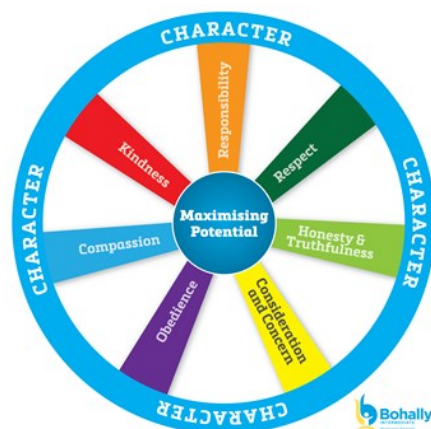
When administration officers feel bogged down by handling student enrolments, they really need to remember their intermediate school colleagues who have students turning over every two years—and that's not counting the arrivals and departures during the year. Like many intermediate schools, however, the staff at Bohally are proud of what their school can offer.

Intermediate Schooling and why we believe it is important:

Intermediate schooling provides a crucial link in transitioning learners from primary schooling through to being ready for high school education whilst introducing students to a broad range of opportunities and experiences across the curriculum and catering for individual needs during this crucial and unique developmental stage. We believe in a holistic education that develops the whole person. Being able to concentrate on these two important years with teachers and support staff who understand the needs of our emerging adolescence is invaluable in the physical, emotional and spiritual development of our students at a time when they are gaining independence but still need guidance. We include student voice in our programs to nurture a deeper level of creative, critical thinking as students are questioning the status quo. We also include student voice to ensure there is a broad range of perspectives and students gain a sense of ownership.

Bohally has developed a Character Wheel, based on the work of Dr Julia Atkin which incorporates a vision for "Powerful Learning at Bohally". Developed in conjunction with the wider school community, the Character Wheel depicts the most important values for the Bohally student to become responsible, valuable citizens who are maximizing their potential.

At the start of each year we go over the value of this wheel and follow the Cornerstone Program. All school life underpins this program reading, PP4L, playground behavior, science, restorative chats to name a few, which sets up the climate of our school and is reflected in the nature students speak to their peers, teachers and greater community and prompts positive behaviour.



All students set goals for themselves at the start of each term based around one of the characters on the wheel and reflect on them at the end of each term.

Other unique aspects to Bohally are our commitment to the explicit teaching of Philosophy, based on the work of Matthew Lipman and 'Philosophy for Children'. We are currently working to integrate this with our Inquiry learning process, Character education and Restorative approach to relationships in order to create a thorough and seamless school culture based on learning to think and respecting ourselves and the community as an expression of our values of Community, Integrity and Inquiry.

The Marlborough Technology Centre is part of and managed by Bohally Intermediate School. State of the art facilities allow an extensive range of technology options to be provided to Year 7 and 8 pupils across Marlborough including Food Technology, Biotechnology, Digital Technology, Robotics, Materials Technology, Hard Materials, Soft Materials, Repurpose, Video Production.



Below is a list of annual seminars where MUSAC and Solutions & Services staff members have been and will be attending in 2017.

Conference	Location	Venue	Date
Rural and Teaching Principals' conference	Wellington	CQ Conference and Events Centre	Wed 24 - Fri 26 May
MUSAC edge conference	Christchurch	Rydges Latimer	Thurs 1 - Fri 2 June
New Zealand School Trustees' Association	Dunedin	Dunedin Centre	Thurs 13—Sun 16 July
South Island School Office Administrators' Conference	Christchurch	Riccarton Park Function Centre	Thursday 27 July
National Association of Secondary Deputy & Assistant Principals (NASDAP) conference	New Plymouth	The Devon Hotel	Wed 16 - Fri 18 August
New Zealand Area Schools Association conference	Wellington	James Cook Grand Chancellor Hotel	Wed 16 - Fri 18 August
NZ Principals' Federation (NZPF) conference	Queenstown	Queenstown Events Centre	Tue 19 - Fri 22 September

**15TH ANNUAL SOLE CHARGE
AND RURAL TEACHING
PRINCIPALS' CONFERENCE**

THEME: OUT OF THE Paddock AND ONTO THE PLATE



As edgeSMS expands into a range of schools, it is important that data is kept tidy and each person only has one edge identity.

Basically, each adult is a staff member at an edge school and/ or the caregiver of a student at an edge school. Each person should only have one edge profile, which is recognisable when they logon using their unique email address. School employees logon at <https://staff.musac.school.nz> while caregivers logon through the caregiver portal, <https://parent.musac.school.nz>. A school employee who is also a caregiver should use the same email address and password on both sites.

For the caregiver portal to work properly, it is important that each caregiver only exists once on edge. To find an existing person on edge, you may need to try searching by either a person's legal name or preferred name. The most effective way to locate a person (in order of preference) is to search by email address, followed by cellphone number (using the recommended format 02x xxx xxxx) then postcode. If you know that a person exists on edge but you can't find them through the usual channels, it is better to ring the appropriate school(s) and seek assistance to locate the person on edge. A simple conversation could save a lot of anxiety and time in the long run.

NB if a school changes the contact details of a caregiver, this alters the person's edge profile and these changes take effect in all of the edge schools with which the person is associated.

What the caregiver's dashboard should look like when the portals are open at the edge schools which their children attend....

The screenshot shows the caregiver dashboard for Cameron Adams. At the top, there is a navigation bar with links for Home, Caroline, Carter, Jake, and John, and a Log Out button. The main content area is divided into two columns. The left column, titled 'School Announcements', contains two items: 'Winter Sports Expo' (by MUSAC Demo Primary School) and 'Winter uniform' (by Secondary School). The right column, titled 'Contact Details', lists the following information: Email: musaccaregiver@musac.co.nz, Phone (Work):, Phone (Cell):, Phone (Home):, Street Address: 26 Massey Avenue, Suburb or RD Number: Greenlane, Town or City: Auckland, and Postcode: 1061. A 'Change edge Password' button is located at the bottom right of the contact details section.

Our Payroll Expert: Trish Bennett

Trish has been working on and off in Education Service Payroll since way back before Tomorrow's Schools in 1989. More recently she has been contracted to the Ministry of Education as an Education Payroll Advisor and now Solutions and Services as a Payroll/Novopay/HR Consultant. Trish also works closely with David Reeve of Payroll Toolkit. Her work is varied and she helps schools New Zealand wide in many ways – problem resolution, training, relief payroll administrator, taking seminars and workshops, presenting at EO's meetings.

Home life is busy with three teenage children, a partner, an elderly Mum, two crazy mutts, a crazy cat and a crazy budgie to look after. It's all heaps of fun though for someone who thrives on a busy work and home life.



edgeSMS and finance

There are some trickier issues that may arise in edge finance, including **Reversals, Exemptions, Refunds and Moving Credits between family members**.

The **Transaction Summary Page** has the functionality on it to reverse transactions, refund payments and payout credits.

An Incorrect Payment - If you wish to reverse a payment, click on the X beside **the payment received line**. A box will appear and you just process the payment.

An Incorrect Billing - If you wish to reverse an item on an individual student, click on the X beside **the unpaid item**. A box will appear and you will need to enter a reason for removing/exempting the item.

Refunding a Paid Item - To refund a paid item, click on the X beside **the paid item** (not beside the payment).

The money refunded automatically becomes a credit on the student's account, and the item is exempted. This credit can be allocated to a future debt or refunded to the parent.

There is a tick box which you would use if you wished to reverse the payment only and leave the item on the students account as a debt.

Refunding a Credit/Moving Credits between family members – If the student has a credit, a **Refund Credit** button will appear on the transaction summary page. Once you have clicked on this button you will get a box to fill in with details of the refund.

If you wish to move a credit between family members, put the reason for refund as 'Transferred to Johnny'.

Ensure that you process the transferred amount as a payment on the same day in the same batch, that is, go to Johnny's **Payment Received** page and enter the payment – same date, same method and as a credit, payment note – transferred from Mary. The two actions will cancel out each other in your batch report.

Process Billable Item

Reversal Details

This process reverses a billable item and any payments applied to that item. Any payments reversed will be added to unallocated credit.

Item: Uniform Item

Amount: \$25.00 Billed, \$0.00 Outstanding.
\$25.00 to be added to unallocated credit.

Reverse payment only: ☐

Date: 11/Mar/2017

Reason: Item returned refund issued

Process

Process Billable Item

Refund Details

Available Credit: \$25.00

Date: 11/Mar/2017

Amount: \$25.00

Refund Method: Electronic Payment

Reference:

Reason: Transferred to Johnny

Process

Payment Received

Date Received: 11/Mar/2017

Amount Received: \$25.00

Method of Payment: Electronic Payment

Payment Note: Transferred from Mary



Rowing report!!!

During April, Sue Green participated in Hoes Kaha—Row the Waikato and sent us this report, accompanied by the photo.

Had a great time up north, unfortunately only got to row 107 rather than 165km as the river was still high after cyclone and the section between Cambridge and Hamilton is narrow and much too dangerous. Still got to meet some great folk and the girls in our crew are all super girls so we had lots of fun.

We hasten to add that Sue did return home safely and is currently on a well-deserved North American holiday.



Farewell to Cheryl Jenkins

We were sad to farewell Cheryl at the end of March but were very excited to hear about her move to Avonside Girls' High School as its incoming executive officer. Avonside Girls' is one of "our" schools and at the same time as we wish their long-serving executive officer a happy retirement, we are very pleased that they have made a good appointment.

Cheryl was with Solutions and Services for over ten years, after we headhunted her from Akaroa Area School. Known for her meticulous approach to gathering and analysing data, Cheryl has been an integral part of the Solutions and Services team. Ann's response when we heard of her imminent departure was that a school reclaiming one of our staff *was bound to happen sooner or later*.

Cheryl's new position is extra challenging as Avonside Girls' and Shirley Boys' high schools are in a transition phase over the next two years for a combined schools site at the former QE2 site. There will be a lot of property management involvement and planning in the position and that area has always been of special interest to Cheryl.



Wagging the tail...



Jake has found Rose Street a bit quiet after March madness and its houseful of people. He enjoyed all of the extra attention (only at break time, of course) and became more relaxed around groups of people. Nevertheless, Izaak continues to be his best bud spending time with him outdoors and Rachel is still his person of choice to open the back door — even though he can do it himself, especially now that a mouth attachment has been added to the handle.

His trainer, Kelly is delighted with Jake's progress and has signed him up for some additional agility classes.

Introducing Alegria and Rachel

Alegria Buenventura and Rachel Harrison joined Solutions and Services at the beginning of the year fresh from studying at Ara Institute of Canterbury.

Alegria has more than 15 years' experience in finance, external auditing and corporate accounting. Currently working towards her membership with CPA Australia, she is also a member of the Philippines Institute of Certified Public Accountants and the Institute of Certified Forensic Accountants (Philippines/Asia Pacific).

A fan of Kung Fu and comedy films, she enjoys watching Jackie Chan and Stephen Chow movies. She loves the 90s Irish band The Cranberries and their "To the Faithful Departed" album in particular.

Alegria is married with three children. The youngest in a family of five children, she considers herself lucky to have such loving parents and siblings who have been very supportive of her endeavours.



Rachel and Alegria with one of their Ara lecturers, Adam Hollingworth

Rachel joined Solutions and Services after having worked as Office Manager at AMT Mechanical Services for the past 4 years. She is studying part time towards a Bachelor of Applied Management — majoring in Accountancy with Ara Institute of Canterbury and has two papers remaining.

Rachel married in January 2016 and is expecting her first child in October this year. In her spare time, Rachel and her husband enjoy camping, fishing and motocross riding.