School Dynamics

THE SCHOOL DYNAMICS MANUAL · CHAPTER 3

Students

Admit, find, move and look after students, their parents, photos, documents and records.

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CHAPTER	LESSONS	SCREENS	EDITION

Edition of 11 November 2026. The latest version, with search and questions answered by the team, is at app.schooldynamics.ug/help.

Screens show the demo school: every name and figure is invented. © 2026 Newline Technologies Limited, Kampala.

Contents

03 **Students**

Find a student
Admit a student
Import students from a spreadsheet or SchoolPay
A student's page
Student photos
Change a student's class and promote a class
Parents and guardians
Online applications
Letters, ID cards and exports
Discipline and conduct records
Answer a parent's request for their child's records
Students who leave

03

Students

Admit, find, move and look after students, their parents, photos, documents and records.

Everything about a student lives on their page: class, parents, fees, marks, attendance and documents. This chapter shows how students come in (one by one, from a spreadsheet or by online application), how to find them, and how they move through the school.

Find a student	4 min
Admit a student	5 min
Import students from a spreadsheet or SchoolPay	5 min
A student's page	4 min
Student photos	2 min
Change a student's class and promote a class	4 min
Parents and guardians	3 min
Online applications	4 min
Letters, ID cards and exports	5 min
Discipline and conduct records	2 min
Answer a parent's request for their child's records	1 min
Students who leave	2 min

CHAPTER 3 · STUDENTS

Find a student

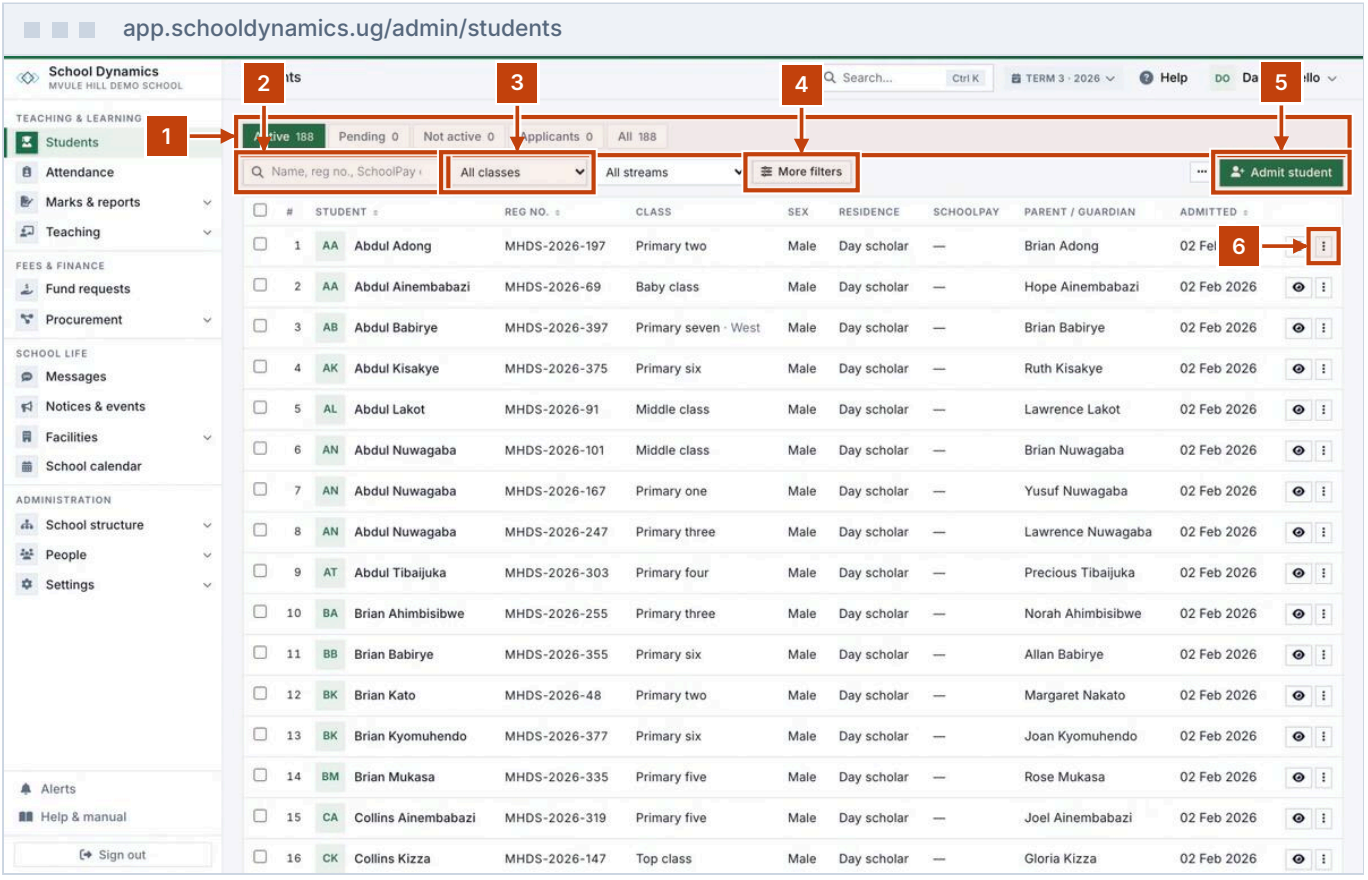
Search and filter the students list, look at a student in a quick view without leaving the list, and use the row menu and the ticked-student actions.

For: Secretary, School administrator, Director of studies, Head teacher, Teacher, Bursar · app.schooldynamics.ug/help/students/finding-students

The students list is where you look up a student, check who is in a class and act on many students at once. Open it from **Teaching & learning › Students**.

Anyone on staff who works with students can open it: teachers, the head teacher, the director of studies, the bursar, the secretary, the warden and the nurse. Only the school administrator, the director of studies and the secretary can admit, edit or move students.

Reading the list



The demo school · invented names and figures

1. The status tabs, each with how many students it holds.
2. Search by name, reg no., SchoolPay code or phone number.
3. Show one class. Classes are grouped by year.
4. Sex, day or boarding, SchoolPay code, admission dates and more.
5. Admit a new student.
6. The row menu: full profile, admission letter, edit, status, class.

The tabs at the top 1 sort students by their status:

Tab	Who is on it
Active	Students in school now. The list opens here.
Pending	Admitted but not yet active, for example waiting to report.
Not active	Students who left or finished school.
Applicants	Students the old system made from online applications.
All	Everyone, with a **Status** column.

Each row shows the photo (or initials), the name, the reg no., the class and stream, sex, day or boarding, the SchoolPay code, the parent or guardian with their phone, and the day the student was admitted. A student with no class shows a red **No class** label.

Click the **Student**, **Reg no.** or **Admitted** heading to sort by it.

Searching and filtering

- Type in the search box 2. It finds a name, a reg no., a SchoolPay code, a LIN or a phone number. With seven or more digits it also finds the guardian's, father's and mother's numbers, however the number was written.
- Choose a class 3. Classes are grouped by academic year, and the active year is marked. **No class** finds students without one. When a class has streams, a stream box appears beside it.
- Press **More filters** 4 for sex, day scholars or boarders, the SchoolPay code (**Has a SchoolPay code**, **No SchoolPay code**, **Code shared with another student**) and the dates a student was admitted. Schools with theology classes also get the theology class and stream here.
- **Clear filters** puts everything back.

The counts on the tabs follow your search and filters, so you can see at once how many of a class are pending or not active.

> TIP
>
> To find a student from any page, press Ctrl + K and type their name. See Finding your way.

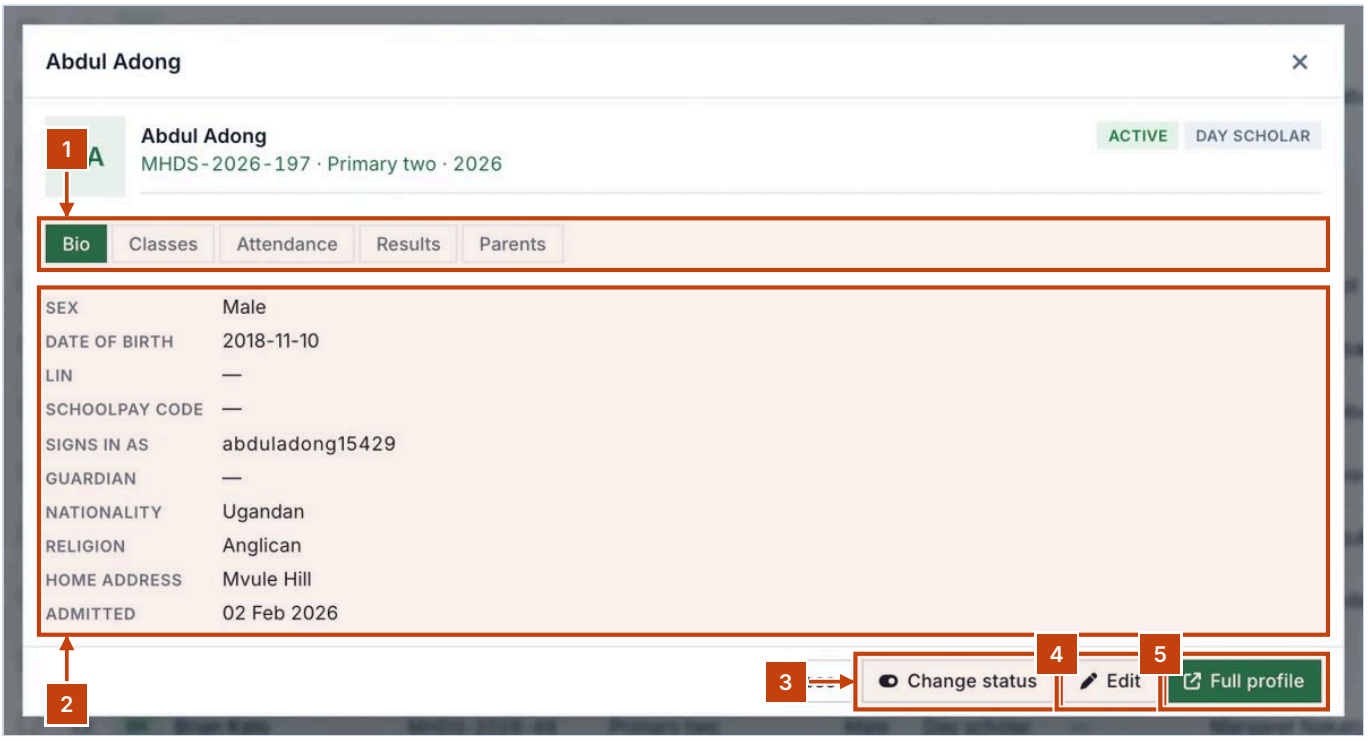
The row menu

The ⋮ button at the end of each row 6 is the student's row menu. It holds:

- **Full profile**: the student's own page.
- **Admission letter**: the student's admission letter as a PDF, in a new tab. See Documents and ID cards.
- **Edit details**, **Change status** and **Change class**, for those who manage students.

Looking at a student without leaving the list

Click a student's name, or the eye at the end of the row. The student's record opens in a quick view over the list.



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1 The record, tab by tab: bio, classes, attendance, results, parents.

2 The tab's facts.

3 Change the student's status.

4 Edit the student's details.

5 Open the student's own page.

The quick view has the same tabs as the student's own page 1: **Bio**, **Classes**, **Fees** (for those who see fees), **Attendance**, **Results** and **Parents**. The facts of the open tab show below 2. On the **Fees** tab, the bursar can open the fees account or record a payment from here.

At the bottom, **Change status** 3 and **Edit** 4 open the same dialogs as on the list, and **Full profile** 5 opens the student's page. **Close** or Esc takes you back to the list where you were.

A student's name is a quick view link everywhere in School Dynamics: on roll-calls, class lists, discipline records and more.

Acting on many students at once

Tick the students in the first column, or tick the box in the heading to tick the whole page. When the list has more pages, **Select all … matching** takes every student that matches your search and filters.

A bar appears with the actions: **Status**, **Promote**, **Class**, **Stream**, **Sex** and **Reg. numbers** (and **Theology stream** at schools with theology classes). Each one opens a dialog that says exactly what will happen, and who will be left as they are and why, before you confirm. See Changing class and promotion and Students who leave.

GOOD TO KNOW

A long action carries on while you work elsewhere. Its progress shows at the top of the list and in the progress tray, and only one batch action runs for a school at a time.

Students without a registration number

If some active students have no reg no., a yellow line says how many. Press **Give them numbers** to number them all. The number is the school's short name, the year the student was admitted and their record number, for example MHDS-2026-1042. Students who already have a number keep it.

More student pages

The ⋯ button at the right of the toolbar opens **Class lists**, **Promotions** and **Optional subjects** (see Changing class and promotion) and, for those who manage students, **Export**: a CSV file of every student on the tab you are on who matches your filters.

QUESTIONS

Why can I not see the Admit student button or the tick boxes?
They are for the school administrator, the director of studies and the secretary. Other staff who may see students can search, filter and open them, but not change them.

A student I admitted last year is not on the list. Where are they?
The list opens on the **Active** tab. Look under **Pending**, **Not active** or **All**. If the student has no class, choose **No class** in the class filter.

Can I search by a parent's phone number?
Yes. Type at least seven digits. The search looks in the student's own phone numbers and the guardian's, father's and mother's numbers on the student's record, in any way the number was written.

How do I get the list into Excel?
Press ⋯ at the right of the toolbar, then **Export**. You get a CSV file of every student matching the filters on the tab you are on, not only the page you see. For a spreadsheet with the columns you choose, use Exports.

Admit a student

Add a new student in one dialog, and see what the system does for you - the reg no., the fees account, the class record, the parent and this term's fees.

For: Secretary, School administrator, Director of studies · app.schooldynamics.ug/help/students/admitting-a-student

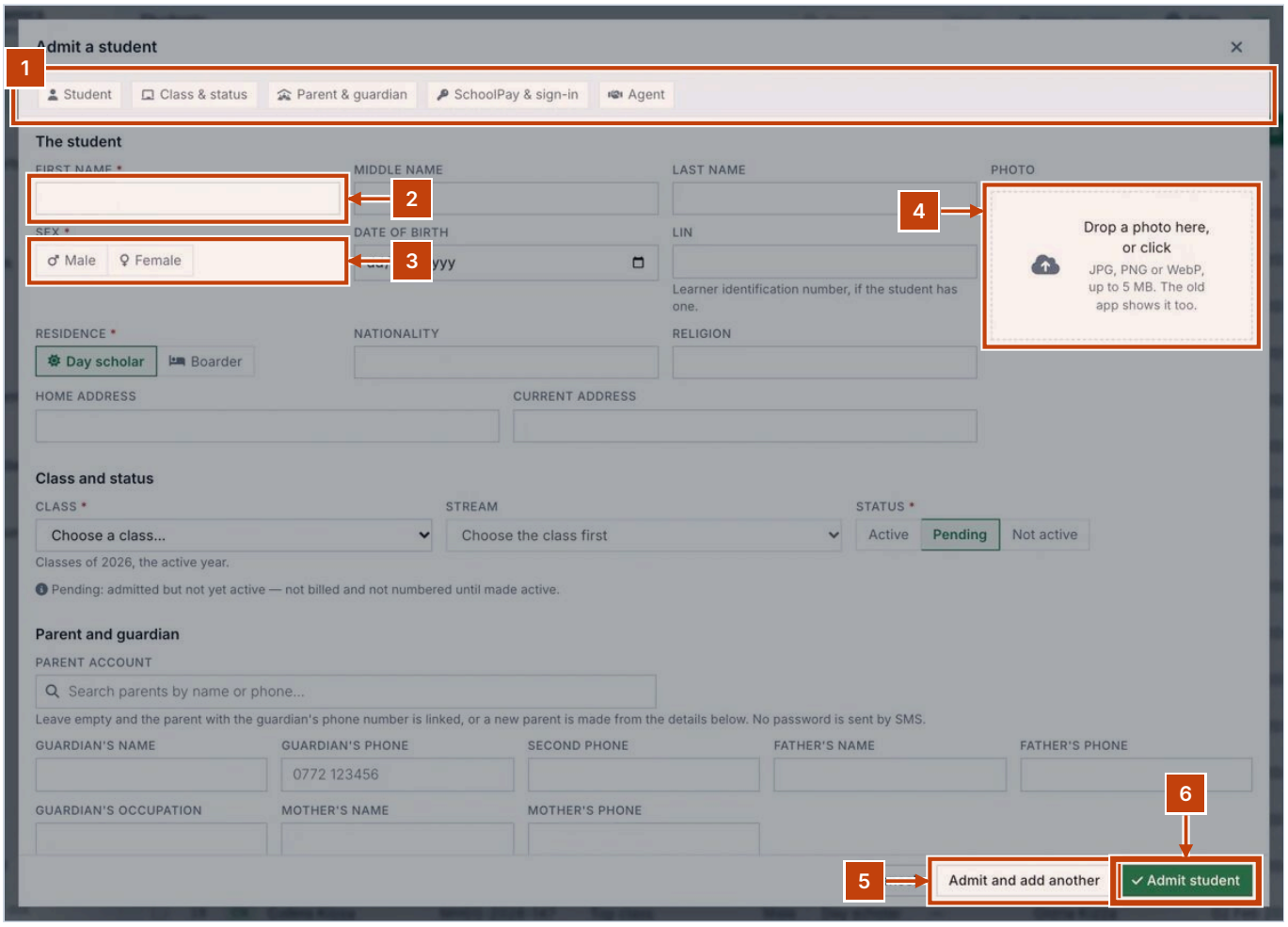
Admitting a student puts them on the register in one step. You fill one dialog, and the system does the rest: the reg no., the fees account, the class record, the parent account and, for an active student, this term's fees.

To bring in many students at once, use Importing students. Students who apply online are admitted from Online applications.

Before you start

- You need to be the school administrator, the director of studies or the secretary.
- The school needs an active academic year with its classes. If it has none, the dialog says *This school has no active academic year, so students cannot be placed in classes.* Set one up under › **Academic years**.
- To bill fees when you admit an active student, the class's fees for the active term must be set. See Fee structure.

Admit a student



The demo school · invented names and figures

1. Jump to a part of the form.
2. First name: the only name you must give.
3. Choose the sex: it is required.
4. Drop a photo here, or click to choose one.
5. Admit, and start again with the same class.
6. Admit the student.

1. Open **Teaching & learning › Students** and press **Admit student**. If the list is showing one class of the active year, that class is already chosen in the dialog.
2. Type the first name 2. Middle and last names are optional, but a full name is best.
3. Choose the sex 3. Residence is **Day scholar** unless you choose **Boarder**. Add the date of birth, LIN, nationality, religion and addresses if you have them.
4. Add a photo 4 if you have one: JPG, PNG or WebP, up to 5 MB. See Photos.
5. Under **Class and status**, choose the class (only the active year's classes are listed) and the stream if the class has streams.
6. Choose the status: **Pending** (the default), **Active** or **Not active**. The line under it says what each one means.
7. Under **Parent and guardian**, type the guardian's name and phone, and the father's and mother's if you have them. Leave **Parent account** empty unless you know the parent is already in the system; then search for them by name or phone.
8. Under **SchoolPay and sign-in**, type the SchoolPay payment code if the student has one.
9. Press **Admit student** 6, or **Admit and add another** 5 to keep the class, stream, status and residence for the next student.

The chips at the top 1 jump to each part of the form: **Student**, **Class & status**, **Parent & guardian**, **SchoolPay & sign-in** and **Agent**.

When the student is saved, a message at the bottom says what was done, and the new student opens in a quick view over the list.

What the system does for you

When you admit a student, School Dynamics does all of this on its own:

- **A fees account.** Every student gets one. See Student accounts.
- **A class record** for the class (and stream) you chose, in the active year.
- **A parent account.** If you picked a parent, the student is linked to them. If not, the system looks for a parent of the school with the guardian's phone number and links them. If there is none, it makes a new parent account from the guardian details (the father's name first, then the mother's, then the guardian's). The message says *Parent … added; no password was sent* or *Linked to parent …, found by phone number*. With no guardian name or phone, no parent is made.
- **A sign-in name.** A student with a SchoolPay code signs in with it, unless you type another name under **Sign-in name**. If someone else already signs in with that code, the message gives the name the student got instead.

For an **active** student, also:

- **A reg no.**, made from the school's short name, the year and the student's record number, for example MHDS-2026-1042.
- **This term's fees** for the class, each fee once. The message says *Billed UGX … in fees for ….* If a fee could not be billed, the message says why; the student is still saved.
- At schools with theology classes, a place in the theology class you chose.

A **pending** student gets none of these three until you make them active. See The student's page.

Rules the dialog checks

- First name, sex, residence and class are required.
- The class must be a class of the active year, and the stream must be one of that class's streams.
- A SchoolPay code belongs to one student of the school only. A LIN belongs to one student only; words like "N/A" or "None" count as no LIN.
- **Applicant** cannot be chosen: applicants come only from online applications.

If something is wrong, the field turns red with the reason and the message *Check the highlighted fields.* Nothing is saved until every field is right.

Changing a student's details later

Open the student (from the list, their quick view or their page) and press **Edit details** (or **Edit**). The same dialog opens with **Save changes**. The same things follow a save: a parent is found or made if the student has none, and a student who becomes active is numbered and billed.

> ⚠ **CAREFUL**
>
> Moving an active student to another class takes back the old class's fees billed to them for the active term, and bills the new class's fees. The message after saving says how much was reversed. See Changing class and promotion.

If you change the SchoolPay code and the student signed in with the old code, their sign-in name follows the new code, unless someone else already signs in with it. The message says which happened.

Marketing agents

If an agent brought the student to the school, tick **Brought to the school by a marketing agent** and choose the agent, the commission in UGX and whether it is paid. Only staff with the Marketing agent role are listed. The students list can then be filtered by agent under **More filters**.

QUESTIONS

Should I admit a student as Active or Pending?
Pending when the student has not reported yet. Nothing is billed and no reg no. is given until you make them active. Active when the student is in school now; they are billed this term's fees for their class at once.

Can I put a new student in last year's class?

No. Students are placed only in classes of the active academic year. If the class you want is missing, add it under Classes.

Does the parent get a text message with a password?
No. When the system makes a parent account from the details you type, no password is set or sent. The parent signs in with a one-time code; see Signing in with a code.

I typed a SchoolPay code and it was refused.
Each student needs their own code. The message names the student who already has it, for example *SchoolPay code … already belongs to …*. Check the code, or fix the other student's record.

Can I delete a student I admitted by mistake?
Students are never deleted. Mark the student **Not active**; see Students who leave.

Import students from a spreadsheet or SchoolPay

Admit many students at once from Excel or CSV, or register the students SchoolPay knows. Every row is checked and shown before anything is written.

For: Secretary, School administrator, Director of studies · app.schooldynamics.ug/help/students/importing-students

When a new term brings many new students, or a school starts using School Dynamics, you can admit them from a spreadsheet instead of one by one. You can also register the students who already pay through SchoolPay but are not on the register yet.

Open **Administration › People › Imports**.

Before you start

- You need to be the school administrator, the director of studies or the secretary.
- The school needs an active academic year with its classes: imported students are placed only in classes of the active year.
- Save the list as Excel (.xlsx or .xls) or CSV, one student per row, with a row of column headings. The file can be up to 10 MB and 5,000 rows.

> **GOOD TO KNOW**
>
> Nothing is written when you upload. Every row is checked first, and the page shows exactly what each row will do. Students already here (the same SchoolPay code, the same reg no., or for a row with neither, the same name in the same class) are found and left as they are.

Import students from a spreadsheet

1. Press **Students from a spreadsheet**.
2. Type a title you will recognise, such as *New P.1 pupils, Term 1* (optional: the file name is used otherwise).
3. Drop the spreadsheet in the box, or click to choose it.
4. Press **Upload and choose columns**. The import's own page opens.
5. Under **1. Choose the columns**, check the **Headings are on** row and, if the file has several sheets, the **Sheet**.
6. Say whether **The names are In one column** (first word, middle words, last word) or **In separate columns**.
7. Check each field's column. The system guesses them from the headings; choose **Not in the sheet** for a field the file does not have.
8. Under **For every row**, choose **One class for every row** if the whole sheet is one class, or leave it to read each row's class from the class column.
9. Choose whether **New students are Pending** or **Active**, and the residence and sex to use when a row does not say.
10. Press **Save and check every row**.

Checking writes nothing. The page then shows how many rows are **Ready**, how many have **Problems**, how many have **Nothing to do** (already here, or left out) and how many are **Imported**.

Fixing the rows with problems

A row is a problem when it cannot be admitted as it is: no name, no or unknown sex, no class of the active year, a stream the class does not have, a phone that is not a phone number, a SchoolPay code two students already share, two rows for the same student, or a student of the same name already in the class. The **What happens** column says which.

For each row you can:

- Press the pencil (**Correct row ...**): change the names, sex, class, stream, residence, SchoolPay code or reg no., then **Save and check**. When a student of the same name is already in the class and this is another child, tick **Admit anyway: this is another child with the same name**.
- Press **Male** or **Female** on a row that only lacks the sex.
- Leave the row out with the crossed circle on the row (or **Leave it out** in the row's quick view). Nothing is written from it. **Take it back in** undoes that.

Corrections are kept with the import; **Read it from the import again** forgets them. To fix many rows in Excel instead, press **Rows to fix (Excel)**, correct the file and upload it again as a new import.

If you change the columns or choices later (**Change the columns**), check the rows again before importing.

Import

Press **Import ... rows** and confirm. The confirmation says how many students will be admitted and whether as pending or active.

The import runs on its own: you can leave the page, and the progress tray follows it. Each imported student gets exactly what a student admitted by hand gets: a fees account, a class record, a parent account found by phone or made from the parent columns, and, for active students, a reg no. and this term's fees. See Admit a student.

A row whose facts changed between the check and the import (for example, someone admitted that student by hand meanwhile) is stopped, not guessed. Check again to see what it would do now.

Rows marked **Imported** are final and never written again. **Cancel import** stops an import: nothing more is written from it, and rows already imported stay.

> ⚠ CAREFUL
>
> **Active** numbers every new student and bills their class's fees for the active term at once. Choose **Pending** if the students have not reported yet; you can make them active later from the students list.

Register the students SchoolPay knows

When parents pay through SchoolPay for children who are not on the register, those payment codes wait here.

1. Press **From SchoolPay**. The dialog says how many payment codes have paid through SchoolPay but belong to no student here.
2. Press **Gather and check the codes**. Each code becomes a row with the name, class and reg no. SchoolPay last gave; the class is matched to this year's classes.
3. Set the sex on each row with **Male** or **Female**, and correct anything else that is missing.
4. Press **Import ... rows**.

Students from SchoolPay are admitted as pending unless you choose otherwise under **For every code**. When every payment code already belongs to a student, there is no one to register and **Gather and check the codes** cannot be pressed. See SchoolPay.

The list of imports

The **Imports** tab lists every import with its rows ready, problems, rows imported and status. Click a title for a quick view, and **Continue** or **Open** to go back to it. On an import's page, **The file** downloads what was uploaded and **All rows** downloads every row with what happened to it.

The **Made in the old app** tab shows imports from the old system as they were left. Nothing can be run from there; to bring the same people in again, start a new import.

> **TIP**
>
> The same page imports student photos (**Photos**, see Photos) and, for the school administrator, staff (**Staff**, see Staff and their accounts).

QUESTIONS

What if I upload the same spreadsheet twice?
Nobody is added twice. The page says the same file was uploaded before, and every student already here shows as *Nothing to do*.

Which columns must the spreadsheet have?
Only the names, in one column or in separate columns. A class column is needed too, unless you choose one class for every row. Everything else is optional, and the columns can be in any order.

Can I bring in fees balances this way?
No. This page admits students. Balances and payments from a spreadsheet are brought in under Fees imports.

I left the page while it was importing. Did it stop?
No. The import carries on, and its progress shows in the progress tray on every page. Each row is written whole or not at all.

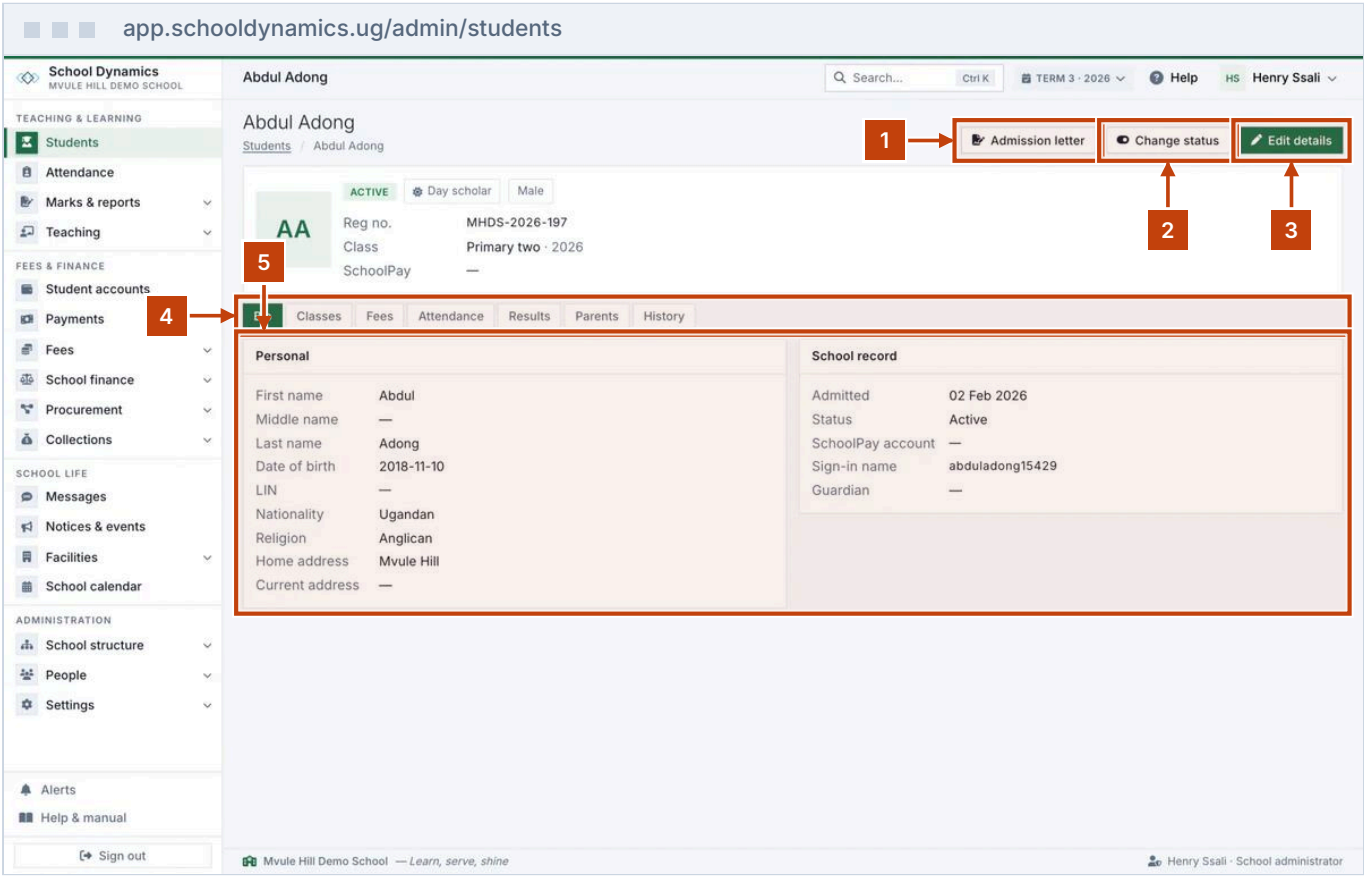
Can I try this in the demo school?
No. Imports are switched off in the demo school.

A student's page

Everything about one student on one page - bio, class history, fees, attendance, report cards, parents and who changed the record - and the buttons to act on it.

For: Secretary, School administrator, Director of studies, Head teacher, Teacher, Bursar · app.schooldynamics.ug/help/students/student-page

A student's page brings everything about one student together. Open it with **Full profile** from the student's quick view, or from the row menu on the students list.



The demo school · invented names and figures

1. The admission letter, as a PDF.
2. Active, pending or not active.
3. Change the student's details, class or parent.
4. The record, tab by tab.
5. The open tab: here the student's personal details and school record.

The top of the page shows the photo, the status, day or boarding, the sex, the reg no., the class and stream with its year, and the SchoolPay code. A click on the photo shows it full size.

Three buttons sit at the top right:

- **Admission letter** 1 opens the student's admission letter as a PDF in a new tab.
- **Change status** 2 makes the student active, pending or not active (see below).

- **Edit details** 3 opens the same dialog used to admit a student, to change any detail, the class or the parent.

Only the school administrator, the director of studies and the secretary see **Change status** and **Edit details**.

The tabs

The tabs 4 each show one part of the record 5.

Tab	What it shows
Bio	Names, date of birth, LIN, nationality, religion and addresses; when the student was admitted, the SchoolPay account, the sign-in name, the guardian, and the marketing agent if one brought the student.
Classes	The class history: one class record per year, with the stream and any optional subjects. At schools with theology classes, the theology classes too.
Fees	What the student owes (or holds in credit) over all terms, what was billed and paid this term, what was brought forward, and the latest lines of their account.
Attendance	The attendance rate, present and absent, for this term, the last 90 days or this year, by kind of roll-call.
Results	The student's report cards, term by term, with marks, aggregates, division and position.
Parents	The parent account, brothers and sisters at the school, and the guardian details on the student's record.
History	Who changed or opened this record. For the head teacher, the deputy and the school administrator.

Classes

Change class opens the edit dialog, where you choose the new class. The branch icon on a class record changes only that year's stream; if it is the current class, the student's stream changes too. See Changing class and promotion.

Fees

Fees account opens the account's quick view and **Statement** opens it as a PDF; the bursar also has **Record payment** here. If some of this term's fees for the student's class are not billed yet, a yellow line says how much; for an active student, the bursar's **Bill now** bills them. See Student accounts and Record a payment.

Attendance

Choose **This term**, **Last 90 days** or **This year**. The figures count closed roll-calls only, and only for a student who is active. See The attendance dashboard.

Results

Each report card opens with the arrow at the end of its row, for those who may read report cards. A student with no report cards yet says *No report cards have been generated for this student yet.*

Parents

The left card shows the linked parent account: name (a link to the parent's page), phone, email and sign-in name, and any **Brothers and sisters here**. **Link a parent** (or **Link another parent**) and **Unlink** change it. With no parent linked but guardian details on the record, **Find or create the parent** links a parent with the guardian's phone number, or makes one; no password is sent. See Parents and guardians.

The right card, **Guardian details on the student's record**, shows the guardian, second phone, occupation, father and mother as typed on the student's record.

History

Every change to the record (what changed, from what to what) and every time someone opened the record, a discipline record or a sick-bay visit, newest first. The top line says whether the parent agreed to the child's photos being used in public: **Agreed**, **Said no** or **Not asked (no)**. See Data protection.

Changing the status

Press **Change status**, choose **Active**, **Pending** or **Not active**, and press the button (**Make active**, **Mark pending** or **Mark not active**). The dialog says what each one does:

- **Active**: needs a class of the active year. The student gets a reg no. if they have none, and is billed this term's fees for their class that are not billed yet.
- **Pending**: admitted, not yet active. Nothing is billed.
- **Not active**: left or graduated. Class records, results and balances stay; nothing is billed. See Students who leave.

If the student cannot become active, the dialog says why, for example *The student cannot be made active: … is not a class of …. Put them in a class of the active year first.* Use **Edit details** to choose a class of the active year, then try again.

QUESTIONS

Why do I not see the Fees tab?
The Fees tab is for those who see the school's money - the bursar, the head teacher, the deputy and the school administrator.

A student's Attendance tab is empty. Why?
It counts closed roll-calls only, and active students only. A roll-call still being taken, or a student who is pending or not active, shows nothing there.

How do I open a student's page from another page?
Click the student's name anywhere to open the quick view, then press **Full profile**. Hold `Ctrl` while you click the name to open the page in a new tab.

Student photos

Add a student's photo, upload a whole class's photos at once, see any photo full size, and download photos for ID cards.

For: Secretary, School administrator, Director of studies · app.schooldynamics.ug/help/students/photos

A student's photo shows on the students list, in the quick view, on the student's page, on roll-calls and on ID cards. You can add photos one at a time or a whole class at once.

Before you start

- Adding and changing photos is for the school administrator, the director of studies and the secretary.
- A photo is a JPG, PNG or WebP picture of up to 5 MB.

Add or change one student's photo

1. Open the student and press **Edit details** (or **Edit** in the quick view).
2. Drop the photo in the **Photo** box, or click the box to choose it.
3. Check the preview. **Keep the old photo** cancels the new one before you save.
4. Press **Save changes**.

You can add the photo when you admit the student too.

See a photo full size

Click any student's photo: on the list, in the quick view or on the student's page. It opens full size over the page, even over an open dialog. The button at the top opens the photo in a new tab; `Esc`, the close button or a click on the dark area closes it.

A student without a photo shows their initials instead.

Upload many photos at once

Name each picture file by the student's SchoolPay code (*1003839865.jpg*), reg no. (*MHDS-2026-1042.jpg*) or name (*Amina-Nakato.jpg*). Then:

1. Open **Administration › People › Imports** and press **Photos**.
2. Choose how **Each picture is named by the student's**: **SchoolPay code**, **Reg no** or **Name**.
3. If the pictures are named by name, choose the class: names are looked for in that class first, then in the whole school.
4. Drop the pictures in the box, or click to choose them. You can choose many at once, up to 1,000.
5. Press **Upload and match**. The import's page opens with every picture and the student it was matched to.
6. Fix the pictures with problems: **Choose the student** by hand, or leave the picture out.
7. Press **Import ... pictures** and confirm.

Nothing is saved until you import. A picture is a problem when it is not a picture, matches no student, matches several, or when two pictures are for the same student. Pictures are shrunk to at most 1,200 pixels.

> **TIP**
> To redo a class's photos in an editing program, download them first from Exports named by reg. no., edit them, and upload them back named by **Reg no**.

Photos and ID cards

An ID card batch lists everyone in it who has no photo, and their card prints their initials where the photo goes. Upload the missing photos, then print again. See Documents and ID cards.

> **CAREFUL**
> Using a child's photo in public (on the school's posts, website or social media) needs the parent's consent. The **History** tab on the student's page shows whether the parent agreed. See Data protection.

QUESTIONS

Is the old photo deleted when I upload a new one?
No. A new photo replaces the one shown, but the old file stays on the server.

My pictures are named by the students' names. Will that work?
Yes. Choose **Name** and, if you can, the class. Dashes and underscores count as spaces, and capitals do not matter. A name that matches two students is shown as a problem, and you choose the student by hand.

Why does an ID card show initials instead of a photo?
That student has no photo yet. The ID card batch lists everyone without one before you print.

Change a student's class and promote a class

Move one student or many to another class or stream, promote a class at the start of a year by hand or by results, and keep class lists and optional subjects right.

For: Director of studies, Secretary, School administrator · app.schooldynamics.ug/help/students/changing-class-and-promotion

A student's class for each year is kept as a class record. Their current class is their class record in the active year. This lesson shows how to move students between classes and streams, and how to promote a whole class when a new year begins.

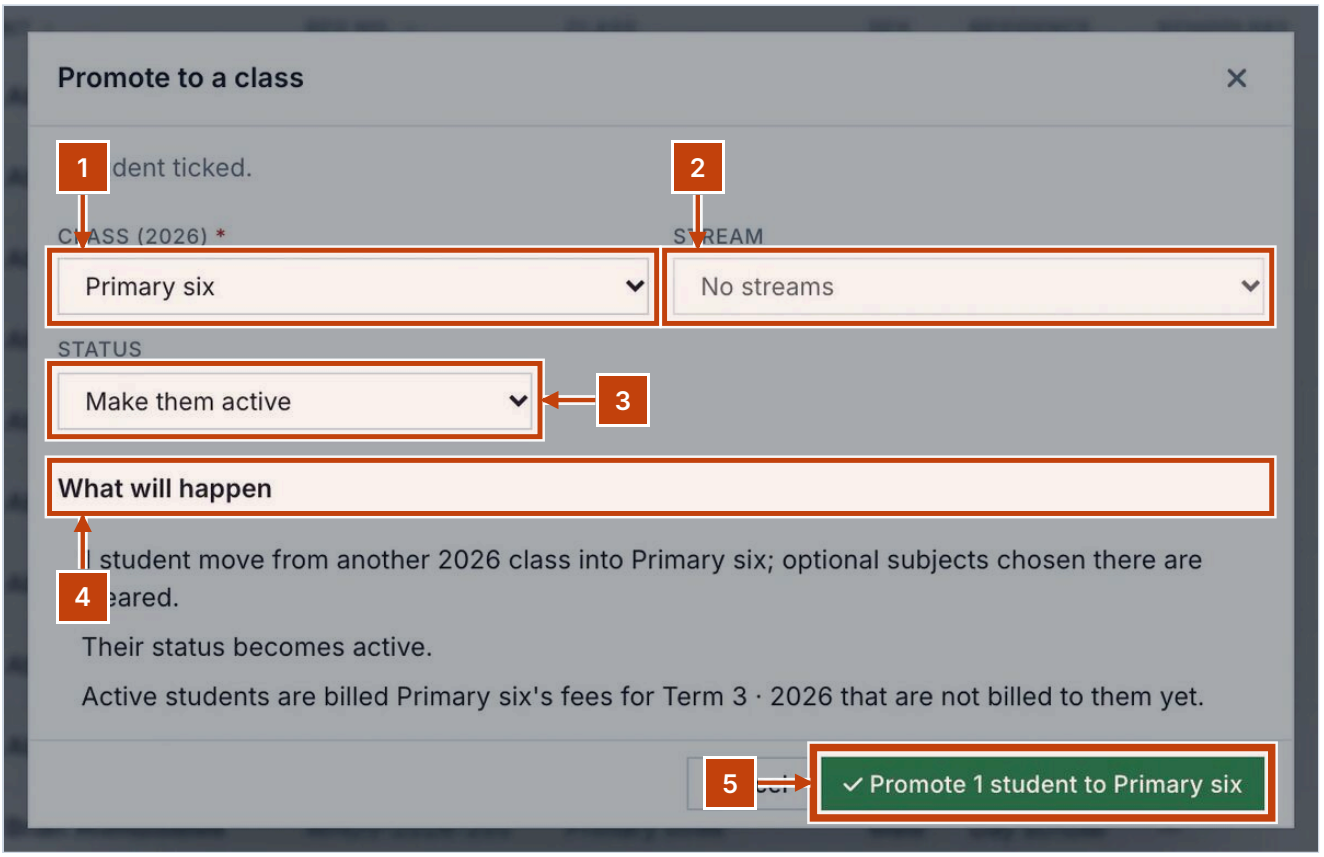
Before you start

- Moving students is for the school administrator, the director of studies and the secretary.
- Students are only ever placed in classes of the active academic year. At the start of a new year, make the year active and set up its classes first: see Academic years and terms and Classes and streams.

Move one student

Use the row menu **Change class** on the students list, or **Edit details** on the student's page and choose the new class. On the page, the branch icon on a class record changes only the stream.

Move or promote many students



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1. The class, from the active year's classes.
2. The stream, if the class has streams.
3. Keep their status, or make them active, pending or not active.
4. What will happen, before anything is done.
5. Confirm: the button says how many students move, and where.

1. On **Teaching & learning › Students**, filter the list to the students you want (for example one class) and tick them, or tick the whole page. **Select all … matching** takes every page.
2. Press **Promote** (to move them up and make them active) or **Class** (to move them and keep their status).
3. Choose the class 1 and, if it has streams, the stream 2.
4. Choose the status 3: **Keep their status**, or make them active, pending or not active. **Promote** starts at *Make them active*.
5. Read **What will happen** 4. It says who gets a new class record, who moves from another class of the same year, who only changes stream, and which fees will be billed. Students who would not change are listed under *… left as they are*, with the reason.
6. Press the button 5, for example **Promote 32 students to …**.

The work carries on while you use other pages, and a message says how many were moved.

The same bar has:

- **Stream**: put the ticked students in one stream. Students not in that stream's class move to that class too.
- **Theology stream**, at schools with theology classes: place them in a theology class and stream. Their ordinary class does not change.
- **Status**: see Students who leave.
- **Sex** and **Reg. numbers**: correct the sex, or give reg nos. to active students without one.

> ⚠ CAREFUL
>
> Fees follow the class. A student made active, or moved into a class, is billed that class's fees for the active term that are not billed to them yet. An active student moved out of a class during the term has that class's fees for the term taken back. Check the fee structure of the new class before moving students in the middle of a term.

A student has one class a year. Moving a student to another class of the same year moves their class record (it does not add a second one), and clears the optional subjects they chose in the old class.

Promote by results

Promotions moves the students of a class whose report card meets a rule. Open it from the ⋯ menu on the students list, **Promotions**.

1. Press **New promotion**.
2. Choose the **From class** (classes with report cards, by year) and the **To class** (a class of the active year).
3. Choose **Who is promoted**: **By total marks**, **By division**, **By position in class**, or **One student**.
4. Choose the term under **Report cards of**, and the pass mark: the lowest total mark, the divisions that pass (from **Division 1** to **Any division (1–4)**), or the lowest position.
5. Press **Preview who moves**. A table lists every student with their marks, division and position, and **Promoted** or *Stays* with the reason.
6. Press **Promote … students**.

Only the previewed list is promoted. If anything changed since the preview (a new report card, a student moved), the page says *The list changed since you looked at it* and you preview again. By division, a card with no division never passes; by position, a card with no position never passes. Students marked **Not active** are left out, and students already in the new class are skipped. Their status does not change.

Every run is kept in the list on the **Promotions** page: when, from and to which class, the rule, the report and how many were promoted.

Class lists

Class lists (from the same ⋯ menu) shows every student's class in each year, past years included. Choose the year (the active year at first), a class and a stream, or search a name or reg no. **Export** gives the list in Excel or CSV.

- **Add an enrolment** puts a student in a class of any year, for example a class record that was missed. If the student already has a class that year, they are moved.
- When a student is in the same class twice, the row says **Duplicate**. **Remove** takes away the extra one; the other stays. Tick **Duplicates only** to see them all.

Optional subjects

Optional subjects (from the same menu) is where you tick the optional subjects each student takes. Choose a class of the active year: each optional subject is a column, with **All** and **None** to tick or untick it for everyone shown. Tick or untick, then press **Save choices**; **Undo changes** forgets what you have not saved.

A class's optional subjects are marked on the class page first. See Subjects.

QUESTIONS

When do I promote students to the next class?

After the new academic year is made active and its classes exist. Students are moved only into classes of the active year. See Academic years and terms.

A student must repeat the class. What do I do?

Leave them out of the promotion. With **Promote by results**, they stay because they do not meet the rule. With **Promote** on the list, do not tick them, then move them into the same class level of the new year with **Class**.

Are the old year's marks and report cards lost when a student is promoted?

No. Promoting adds a class record for the new year. The old year's class record, marks, report cards and balance stay.

I moved a student by mistake. Can I undo it?

Move them back the same way. If fees were reversed and billed by the move, moving back bills the old class's fees again.

Parents and guardians

Find a parent, see their children, add a parent, and link or unlink children - from the Parents list or from a student's own page.

For: Secretary, School administrator, Director of studies · app.schooldynamics.ug/help/students/parents-and-guardians

Every student can be linked to a parent account: the parent's own record, with the phone number they are reached on and the sign-in for the parents' pages and app. A parent can have several children at the school.

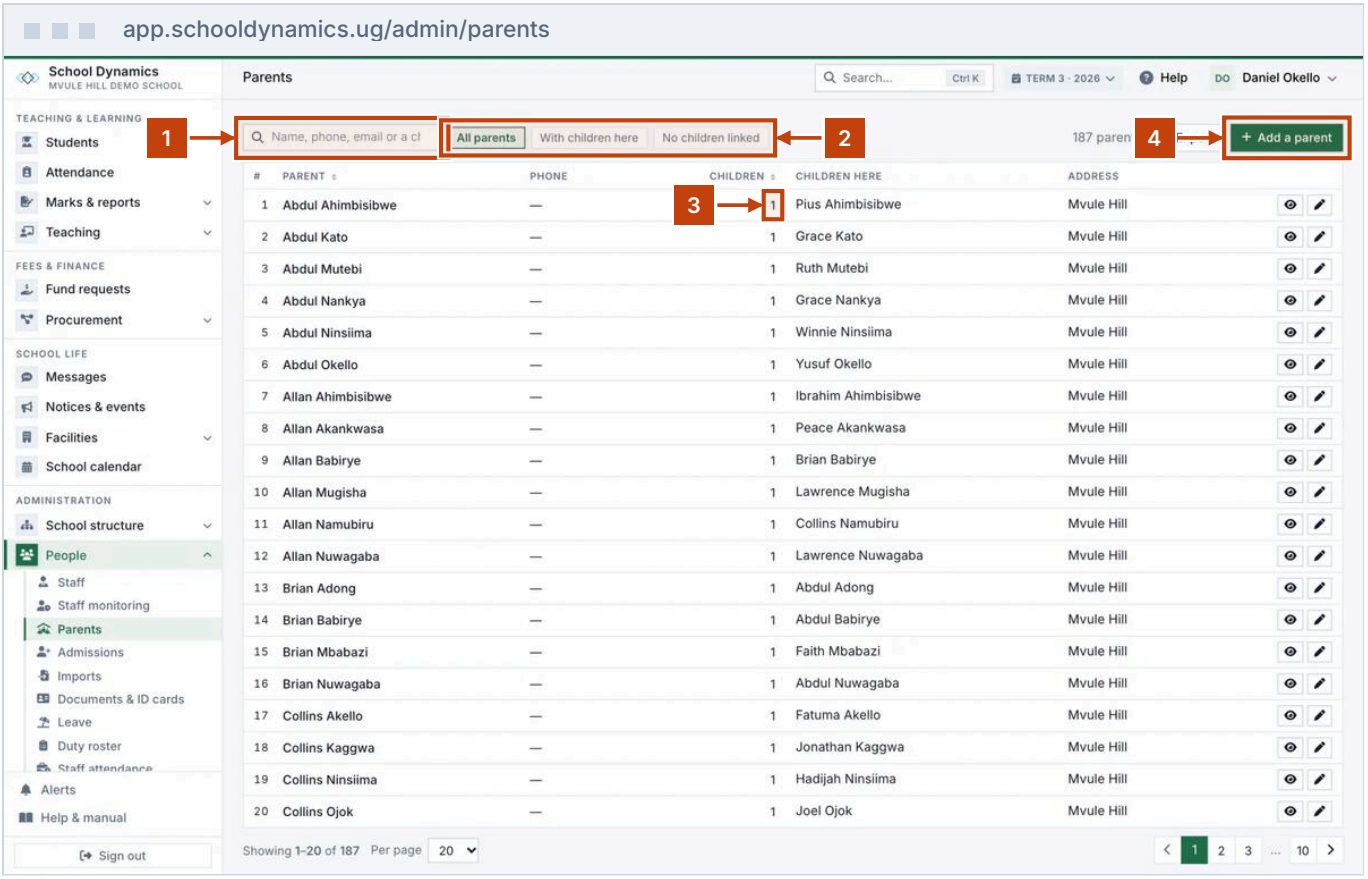
Most parent accounts are made for you: when a student is admitted or imported, the parent is found by the guardian's phone number, or made from the guardian details. This page is for checking them and putting them right.

Before you start

- Anyone who may see students can look at parents. Adding, editing, linking and unlinking are for the school administrator, the director of studies and the secretary.

The Parents list

Open **Administration › People › Parents**.



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1 Search by name, phone, email or a child's name.

2 All parents, those with children here, or those with none linked.

3 How many children; click to see them in the students list.

4 Add a parent by hand.

Each row shows the parent, the phone number they are reached on, how many children they have, the first children's names, and the address. Search 1 by name, phone, email or a child's name, and choose 2 **All parents**, **With children here** or **No children linked**.

Click the number of children 3 to open the students list showing only that parent's children, on the **All** tab.

Click a parent's name for their quick view: phone, email, sign-in name, address, and their children with each child's class and status. From there:

- **Link a child**: search a student by name or reg no. and press **Link**. A student who already has a parent account moves to this one.
- The unlink icon beside a child removes the link. Both records stay; only the link goes.
- **Edit** opens the parent's details, and **Full page** opens the parent's own page, with the same children and buttons.

For those who manage students, **Export** gives every parent matching your search as a CSV file, with their children.

Add a parent

1. Press **Add a parent** 4.
2. Type the first and last name. Both are required.
3. Type the mobile number, for example 0772 123456. It must be a real Ugandan number; the parent signs in with it when nobody else does.
4. Add a second number, email, address, occupation, nationality, religion and a photo if you have them.
5. Under **Children**, search for the parent's children and pick them. A child who already has a parent moves to this one.
6. Press **Add parent**.

A password is optional (at least 6 characters). Nothing is sent by SMS.

Change a parent's details

Press the pencil on the row, **Edit** in the quick view or **Edit details** on the parent's page, then **Save changes**. When you change the mobile number, the parent's sign-in name follows it, unless someone else already signs in with that number.

A student's parents

On the student's page, the **Parents** tab shows two things side by side:

- **Parent account**: the linked parent, their phone, email and sign-in name, and the student's **Brothers and sisters here** (other children of the same parent).
- **Guardian details on the student's record**: the guardian, second phone, occupation, father and mother, as typed when the student was admitted or edited.

The buttons on the left card:

- **Link a parent** (or **Link another parent**): search parents by name or phone and press **Link parent**. Linking replaces the parent the student had.
- **Unlink**: the student no longer has this parent account. The parent's account stays.
- **Find or create the parent**, when no parent is linked: the system looks for a parent of the school with the guardian's phone number and links them, or makes a new parent account from the guardian details. No password is sent.

If there is neither a guardian name nor a phone on the student's record, add them with **Edit details** first.

GOOD TO KNOW

When you unlink a student's parent, the system does not link one again by itself the next time the student is saved. Link the right parent by hand.

What parents can do

A parent with an account can see their children's fees, report cards and attendance on the parents' pages and in the parents' app. See What parents can do.

QUESTIONS

Why does a parent not get a password when I add them?
Nothing is sent by SMS. Set a password in the parent's dialog if they want one, or let them sign in with a one-time code from the parents' app. See Signing in with a code.

Two guardians share one phone number. Is that a problem?
No. Only one person can sign in with a number, so the second parent gets another sign-in name. Both are still reached on that number.

Can a student have two parent accounts?
No. A student is linked to one parent account. The father, mother and guardian are also kept as names and phone numbers on the student's own record.

Can I delete a parent?
No. Parents are never deleted. Unlink their children if they are not this family's parent.

Online applications

Read the applications parents send from the school's page, ask for changes, turn one down with a reason, or accept it - which admits the student and links the parent.

For: Secretary, School administrator, Director of studies · app.schooldynamics.ug/help/students/online-applications

Parents can apply for a place online, from the school's applications page, and upload the documents the school asks for. Their applications arrive on **Administration › People › Admissions**. You read each one, then accept it, ask for changes or turn it down. The applicant follows every step on their private link.

Before you start

- You need to be the school administrator, the director of studies or the secretary. Accepting admits a student.
- Parents can apply only while online applications are switched on. If they are off, the page says *Online applications are switched off*. The school administrator switches them on under › **School profile**, **Online applications**. See School profile.

Reading the list

The figures at the top count the applications **New, waiting**, **Under review**, **With the applicant** (changes requested) and **Accepted**. The tabs sort them the same way: **New**, **Under review**, **Changes requested**, **Accepted**, **Not accepted**, **Not sent yet** (started but not sent), **Cancelled** (only when there are some) and **All**.

Search by name, application number, phone or email, and filter by the class applied for, the sex and the dates sent. The **Documents** column shows how many of the required documents came in, in red when some are missing.

Read an application

Click the applicant's name. The application opens in a quick view with the student, the class applied for and the previous school, the parent or guardian, the contact details, every document (open each one over the page, or in a new tab) and the history of what happened.

Notes for staff are kept with the application and never shown to the applicant; press **Save notes**.

Decide

The buttons at the bottom of the quick view, and the row menu, do the same things.

Start the review moves a new application to **Under review**, so others know someone is on it.

Ask for changes sends the application back to the applicant with your message (**What should change**). It shows on their link, above their form. When they send it again, it comes back to **New**.

Turn down needs a **Reason** of at least ten characters. The applicant reads it on their link, so be clear and kind.

Accept opens a dialog with two ways:

1. Choose **Admit a new student**, or **Already on the register** if the child is already a student here. If a student with the same name is on the register, a yellow line names them.
2. For a new student, choose the **Class** (the class applied for is shown as a hint), the **Stream**, **Day or boarding** and the **Status**: **Pending — joins when they report** or **Active now**.
3. Leave **Parent** empty to link the parent with the applicant's phone number, or make one from the application. Choose a parent only to use another one.
4. For a student already on the register, search and choose **The student** instead.
5. Add **Notes for staff** if you want.
6. Tick **Tell the applicant, with the link to their application** and choose who gets it: SMS to the parent or the contact number, email to the parent or the contact address.
7. Press **Accept and admit** (or **Accept and link**).

A new student is admitted exactly as one admitted by hand: a fees account, a class record, the parent account, and, for **Active now**, a reg no. and this term's fees.

If the application's own details cannot make a student (for example a detail the student form refuses), the dialog says which, and you ask the applicant to correct them with **Ask for changes**.

> ⚠ CAREFUL
>
> Telling the applicant by SMS uses the school's SMS credit, like any message. If SMS is not switched on for the school, only emails can go. See How SMS works.

Message the applicant

Message the applicant... (row menu) or **Message** (quick view) sends a message about the application: choose who gets it, type the message and, if you want, tick **Add the link to their application**. The dialog shows how many SMS parts it makes. Press **Send message**.

The admission letter

Once an application is accepted and linked to a student, **Admission letter** in the row menu opens the student's admission letter as a PDF. The applicant can download it from their link too. To change the letter's words, see Documents and ID cards.

QUESTIONS

How do parents apply?
On the school's online applications page. Switch it on under **School profile**, Online applications; the **The applications page** button then opens it, so you can share the link.

Two of us pressed Accept at the same time. Are there two students now?
No. Accepting the same application twice admits one student; the second finds the application already accepted and changes nothing.

The child is already on our register. Will accepting make a second record?
Not if you choose **Already on the register** when you accept. The application is linked to that student and nothing new is added.

Does accepting bill fees?
Only if you choose **Active now**. A pending student is billed when they are made active.

Letters, ID cards and exports

Print admission letters and your own letters for a student or a class, make and print ID cards, and download student lists and photos.

For: Secretary, School administrator, Director of studies, Head teacher · app.schooldynamics.ug/help/students/documents-and-id-cards

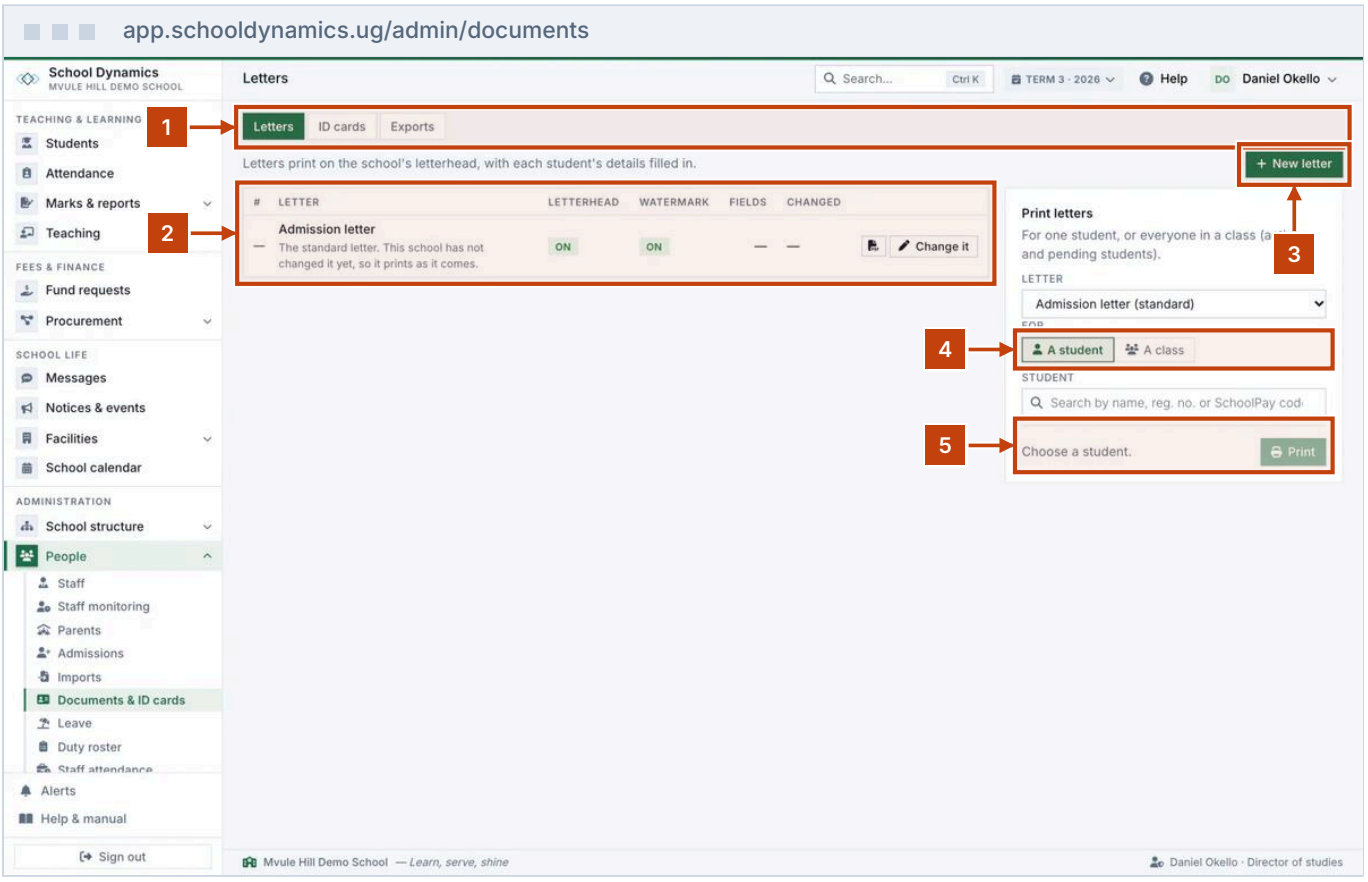
Documents & ID cards prints the papers students need: letters on the school's letterhead with each student's details filled in, and ID cards with photo, reg no., QR code and barcode. Its **Exports** tab downloads student lists and photos.

Open **Administration › People › Documents & ID cards**. Three tabs sit at the top: **Letters**, **ID cards** and **Exports**.

Before you start

- Anyone who may see students can print letters and ID cards.
- Changing letters, making ID card batches and using **Exports** is for the school administrator, the head teacher, the deputy, the director of studies and the secretary.
- The letterhead uses the school's name, logo, address and contacts from the School profile.

Letters



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1 Letters, ID cards and exports.

2 The school's letters. Click a letter to change it.

3 Write a new letter.

4 Print for one student or a whole class.

5 The number of letters, and the print button.

The tabs 1 switch between **Letters**, **ID cards** and **Exports**. The list 2 shows the school's letters, with whether each prints the letterhead and a watermark, and how many student fields it uses. The PDF icon on a row prints the letter with sample details, to check it.

Until the school changes it, the **Admission letter** is the standard one, which prints as it comes. Press **Change it** to make it the school's own.

Print letters

1. In **Print letters**, choose the **Letter**.
2. Choose **A student** or **A class** 4.
3. Search for the student by name, reg no. or SchoolPay code, or choose the class and, if you want, one stream.
4. Press **Print letter** (or **Print ... letters**) 5. The letters open as a PDF in a new tab, one a page.

A class prints its active and pending students. More than 250 students at once is refused: print one stream at a time.

A student's admission letter can also be printed from the row menu on the students list and from the student's page.

Write or change a letter

1. Press **New letter** 3, type its **Name** (for example *Suspension letter*) and choose to **Start from** a blank letter or a copy of another. Press **Add and write it**. To change an existing letter, click its name.
2. Choose whether to **Print the school's letterhead** (turn it off to print on headed paper) and to show a **Faint school logo behind the text**.
3. Write the **Text**. The toolbar has bold, headings, lists and undo.
4. Put student details in with **Insert a field...**. Fields are written in square brackets, like `[STUDENT_NAME]`, and are filled in for each student. `[REQUIREMENTS_TABLE]` becomes the term's fees.
5. Check the preview on the right. It uses made-up details; pick a real student under **Preview with** to see their own letter.
6. Press **Save letter**. **Open as PDF** shows the saved letter.

If you type something in square brackets that is not a field, a yellow note says it will print as typed. Choose fields from **Insert a field...** instead.

The bin on a row deletes a letter. Letters already printed are not affected. The admission letter cannot be deleted.

ID cards

The **ID cards** tab lists the batches of cards made, newest first: who they are for, the design and how many cards.

Make a batch

1. Press **New ID cards**.
2. Choose **Who gets a card**: **Students of classes** (every active student in them), **Chosen people** (students or staff you pick) or **All staff**.
3. Pick the classes (or **All classes**), or add the students and staff one by one.
4. Choose the **Design**: Template 1 (Classic), 2 (Guardian strip), 3 (Badge) or 4 (Portrait).
5. Press **Make the cards**. The batch opens.

Only active students and staff get a card.

Print a batch

The batch shows its first cards front and back, at actual size, with how many cards there are, how many have a photo and how long they are valid.

- Choose the layout: **Front and back side by side** (5 people a page; cut out both sides) or **Double-sided** (10 people a sheet; print both sides and flip on the long edge).
- When some people have no photo, the batch lists them under **Without a photo**, and their card shows their initials. Tick **Only people with a photo** to leave them out for now.
- Press **Print ... cards**. The cards open as a PDF.

> **TIP**
>
> Print at actual size (100%), not "fit to page". Each card is 85.6 × 54 mm, with cut marks.

The number on each card, in its QR code and its barcode, is the person's reg no.. The roll-call scan box finds a student by it; see Taking a roll-call.

A batch of more than 400 cards is too many to print at once: make one batch per class. **Download photos (ZIP)** gives the batch's photos, named the way you choose. **Change** and **Delete** change or remove the batch; cards already printed are not affected.

Exports

The **Exports** tab downloads lists and photos.

- **Student list**: choose the classes (or **Whole school**), the **Students** (**Active**, **Active and pending**, or **Everyone, including those who left**), **Excel** or **CSV**, and the columns (**All** or **The usual**). The count updates as you choose. Press **Download**.
- **Photos**: choose the classes and how to **Name each photo by** (reg no., SchoolPay code or name), then **Download ZIP**. A list of everyone is inside, and the line above the button says how many have a photo. Named by reg no., the photos can be edited and uploaded back in one go; see Photos.
- **Staff list** and staff photos, for those who may see staff.

Photo ZIPs made in the old system are listed at the bottom while their files are still on the server.

> ⚠ CAREFUL
>
> These files hold children's details and their guardians' phone numbers. Keep them safe and delete them when you are done. See Data protection.

QUESTIONS

Can I change the words of the admission letter?
Yes. On **Letters**, press **Change it** on the standard admission letter (or click its name once you have changed it), edit the text and press **Save letter**. The admission letter keeps its name and cannot be deleted.

Why does an ID card show initials instead of a photo?
The person has no photo. The batch lists everyone without one; upload their photos and print again. See Photos.

My printed ID cards are too small.
Print at actual size (100%), not "fit to page". The cards are 85.6 × 54 mm, the size of a bank card.

Until when are the cards valid?
Until the date set as **Student ID cards expire** in the School profile. With no date, 31 December of the current year.

Discipline and conduct records

Record a student's good or bad conduct, what was done about it and everyone's comments, and see a student's conduct over the terms.

For: Teacher, Head teacher, Director of studies · app.schooldynamics.ug/help/students/discipline

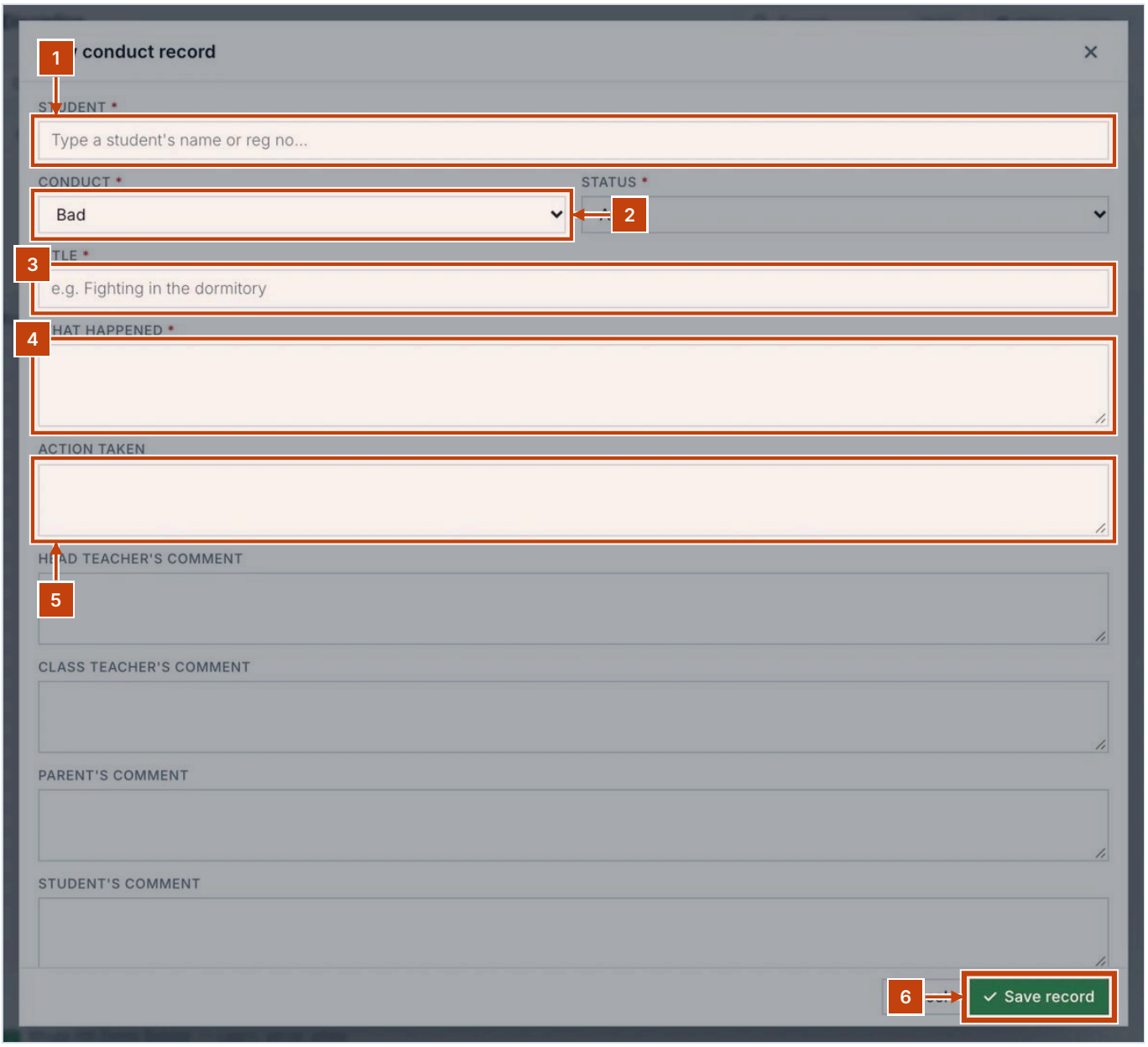
A conduct record notes something a student did, good or bad, what the school did about it, and the comments of the head teacher, the class teacher, the parent and the student. Records are kept term by term, so you can see a student's conduct over the years.

Open **School life › Facilities › Discipline**.

Before you start

- Anyone who may see students can read the records.
- Teachers, the director of studies, the head teacher, the deputy and the school administrator can record, edit and comment.
- The school needs an active term: every record is filed under it.

Record conduct



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1. Type the student's name or reg no., then pick them.
2. Good or bad conduct.
3. A short title, such as Fighting in the dormitory.
4. What happened.
5. What was done, and the comments, when you know them.
6. Save the record.

1. Press **New record**.
2. Type the student's name or reg no. 1 and pick the student from the list. Active and pending students are listed.
3. Choose the **Conduct** 2: **Bad** or **Good**. Leave the **Status** as **Active**.
4. Type a **Title** 3 and **What happened** 4. Both are required.
5. Add the **Action taken** 5 and the comments you have: **Head teacher's comment**, **Class teacher's comment**, **Parent's comment**, **Student's comment**. You can add them later.
6. Press **Save record** 6.

The record is saved with your name, the date and the active term.

Find and read records

The list shows every record, newest first, with the date and term, the student and their class, **Good** or **Bad**, the title, the action taken, who recorded it and the status. Search by the student's name, reg no. or the title, and filter by **Good and bad**, **Any status** and the term.

Click a student's name to see only their records. The page then shows how many good and bad records they have, and **New record** is for that student.

The eye on a row opens the whole record: what happened, every comment, and a photo if one was added. Opening a record is noted in the student's history, which the head teacher can see on the student's page.

Add comments later

Press **Edit or comment** on an open record, or the pencil on its row. Add the comments as they come in and the action taken, and press **Save changes**. A record stays **Active** unless you set its **Status** to **Inactive**.

Delete, on an open record, removes it for good. Only leaders see it.

> GOOD TO KNOW
>
> A parent who asks for a copy of their child's records receives the conduct records too. See Record requests.

QUESTIONS

Can a teacher delete a record?
No. Teachers can record, edit and comment. Only the head teacher, the deputy and the school administrator can delete a record.

Can I change the student on a record?

No. The student is fixed once the record is saved. If it is the wrong student, a leader deletes the record and you record it again.

Why can I not save a new record?
Every record belongs to a term, so the school needs an active term. If there is none, the dialog says *Set the school's active term first*.

Answer a parent's request for their child's records

Parents can ask for a copy of everything the school holds about their child. Prepare the copy, or decline with a reason, within 30 days.

For: Secretary, Head teacher, School administrator · app.schooldynamics.ug/help/students/record-requests

The law gives a parent the right to a copy of what the school holds about their child, and gives the school thirty days to answer. A parent asks from their own signed-in page. The request then waits on **Administration › People › Record requests** until someone prepares the copy or declines.

Before you start

- Record requests are for the head teacher, the deputy, the school administrator and the secretary.

The list

The figures at the top count the requests **Waiting** and those **Past the 30 days**. Waiting requests come first, the one due soonest at the top. Choose **Waiting**, **Ready**, **Declined** or **All**, or search by the child's name.

Each row shows the child, the parent who asked, the day they asked, the day to **Answer by** and the status.

Prepare the copy

1. Click the child's name. The request opens, with anything the parent wrote.
2. Press **Prepare the copy and tell the parent**.

The copy is made at once: a PDF and spreadsheet files holding the child's details, classes, fees account, report cards and marks, attendance, discipline, sick-bay visits, requirements, pocket money and messages. Other people's details (the other parent, emergency contacts, staff) are left out.

The parent is told by a message and downloads the copy from their own page for 14 days. **Download the copy** lets you see exactly what they got, and the request shows how many times it was downloaded.

Decline a request

1. Open the request and press **Decline**.
2. Write **Why (the parent reads this)**.
3. Press **Decline the request**.

The parent is told, with your reason. Only a waiting request can be declined.

> **GOOD TO KNOW**
>
> Asking, preparing, declining and every download are written in the school's audit log. A parent can have one waiting request per child at a time.

QUESTIONS

How long do we have to answer?
Thirty days from the day the parent asked. The list shows the day to answer by, and counts the requests past it.

Does a parent who owes fees still get the report cards in the copy?
Yes. The copy holds the report cards and marks whatever the fees balance.

The parent says the download no longer works.
A copy can be downloaded for 14 days, then the file is removed. Open the request and press **Prepare the copy and tell the parent** again.

Students who leave

Mark a student who left or finished school as not active. Their records and balance stay, they are no longer billed, and they can come back.

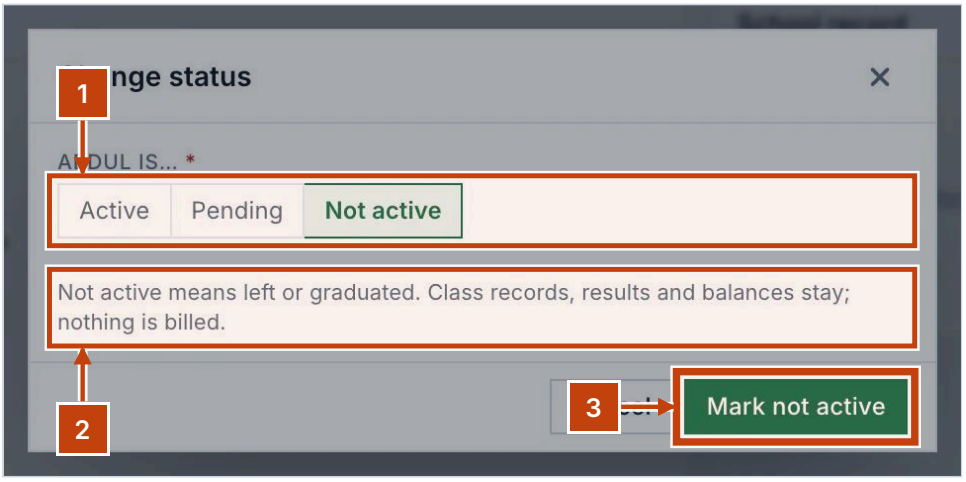
For: Secretary, School administrator, Director of studies, Bursar · app.schooldynamics.ug/help/students/students-who-leave

When a student leaves the school, transfers or finishes their last class, mark them **Not active**. Nothing about them is deleted: they move off the lists of students in school.

Before you start

- Changing a student's status is for the school administrator, the director of studies and the secretary.

Mark one student as not active



The demo school · invented names and figures

1 Choose Not active.

2 What it means: records and balances stay, nothing is billed.

3 Mark the student not active.

1. Open the student's page and press **Change status**. (The student's quick view and the row menu on the students list have **Change status** too.)
2. Choose **Not active** 1. The line below says what that means 2.
3. Press **Mark not active** 3.

Mark many students as not active

1. On **Teaching & learning › Students**, filter the list (for example to the class that finished school) and tick the students, or tick the whole page. **Select all … matching** takes every page.
2. Press **Status** in the bar that appears.
3. Choose **Not active**. The dialog says how many will change, and who is left as they are because they already are not active.
4. Press **Mark … students not active**.

What changes, and what stays

A student marked not active:

- moves to the **Not active** tab of the students list, and off the **Active** one;
- keeps their class history, report cards and marks, and stays on the roll-calls already taken. Attendance figures, on their page and on the dashboard, count active students only;
- keeps their fees account and balance: what they owe stays owed. Fees already billed stay; to change them, see Fixing mistakes;
- is no longer billed: **Bill now** and new term's fees are for active students only;
- is left out of new roll-calls, attendance figures, ID card batches and promotions by results;
- is left out of letters printed for a class (they print for active and pending students), though you can still print a letter for the student by name;
- stays linked to their parent account.

> ⚠ CAREFUL
>
> A payment recorded in the active term on the account of a student who is not active (by hand or through SchoolPay) makes the student active again, as in the old system, if they still have a class. They are then billed this term's fees for that class. If a student who left pays an old debt, check their status and their account afterwards.

The **Student list** export can still include them: choose **Everyone, including those who left**. See Exports.

When a student comes back

Find them on the **Not active** tab, press **Change status**, choose **Active** and press **Make active**.

To become active, a student needs a class of the active academic year. If their class is from an earlier year, the dialog says the student cannot be made active and why: press **Edit details**, choose their class for this year, then make them active.

When they become active again, they are billed this term's fees for their class that are not billed to them yet, and get a reg no. if they have none.

QUESTIONS

Can I delete a student who left?
No. Students are never deleted. A student marked **Not active** stays on the **Not active** tab with their class history, results and balance.

The student left owing fees. What happens to the balance?
It stays on their account. The bursar still sees it and can record payments. See Student accounts.

A student who left is coming back. Do I admit them again?
No. Find them on the **Not active** tab and make them active. Put them in a class of the active year first if their old class is from an earlier year.

A whole class finished school. Do I mark them one by one?
No. Filter the list to the class, tick the whole page (or **Select all ... matching**), press **Status** and choose **Not active**.



School Dynamics

Questions? Ask under any lesson in the app, or write to the team.

app.schooldynamics.ug/help