

## SchoolPay FAQ

### Parent and Site Administrator

#### Parent Support

The following are the most common support questions that parents will ask. The field to the left is the question and the field on the right is the answer. The questions are broken down into the following sections:

- Registration
- Problems with making a payment or a payment that was already made
- SchoolPay Parent Center Account questions
  - Void questions
- Misc. Questions

#### Registration Questions

<b>How do I become a "registered parent"</b>	<p>Go to <a href="http://www.schoolpay.com">www.schoolpay.com</a> and click the square in the middle of the screen that reads, "Create an Account." The parent will complete a form that collects the information needed to create the parent's account. The parent will also, for each child, select the school, enter their child's student ID and name.</p> <p>The process is quite easy and clear to the parent. If the parent is having a problem, please direct them to email <a href="mailto:support@schoolpay.com">support@schoolpay.com</a> or call 888-886-9729.</p>
<b>I can't find this/that email notification</b>	<p>It is very common for auto-response emails to end up in Spam/Junk folders. 9 times out of 10, the email, receipt, etc. is there.</p>
<b>I tried to register but it says my user name is already in the system.</b>	<p>This can happen when a school creates parent accounts on behalf of their parents and then parents later try to register, or if parents forget they have already registered. If a parent receives that message, simply direct the parent to <a href="http://www.schoolpay.com">www.schoolpay.com</a> where they will find a reset password link. The process is described below.</p>

#### Problem with a payment

##### Payment won't go through

<b>I got an error or decline---why?</b>	<p>Find the payment in the REPORTS tab. Sort from either ITEM level or TRANSACTION level and sort by All or Error. Select the item and then "View Details". The details explain the error---in the STATUS field. Errors are usually served by the Issuing Cardholder's Bank, who has final authority on approvals. Therefore, when in doubt, ask the parent to verify the error with their card's issuing bank for an explanation. If you suspect system error, report this to your Service Account Manager.</p>
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<p><b>It won't let me complete a transaction.</b></p>	<p>Most errors are communicated to users via messaging at the top of the page. Common examples are:</p> <ul style="list-style-type: none"> <li>• Leaving required data fields empty</li> <li>• Neglecting to enter a value in an open amount item</li> <li>• "Fat fingering" entering invalid data due to common keyboarding errors</li> </ul> <p>If you've ruled out the usual suspects, and the user still cannot complete a transaction, please either call 888.88.MYPAY (69729) or email <a href="mailto:support@schoolpay.com">support@schoolpay.com</a></p>
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### Paid for the wrong thing by mistake

<p><b>I purchased something by mistake</b></p>	<p>If the transaction is marked "PENDING" a VOID can be performed. If the transaction status reads "SETTLED", the transaction must be refunded to the parent (assuming a refund is authorized by the school/district) in the manner which transactions are refunded today.</p>
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### Questions about Voids

<p><b>My transaction was VOIDED but I see it on my online banking</b></p>	<p>Once a payment has been authorized, it will immediately appear on online banking services as "reserved". Those funds have not been pulled from your account, but because they were already authorized, the funds are reserved. Reserved funds typically clear in 24 hours of a VOID.</p>
<p><b>Can I do refunds through the SchoolPay system?</b></p>	<p>Only specific administrators are allowed to process refunds or voids. Go to a Transaction report and select the specific transaction by clicking the radio button on the left hand side. Then scroll down and click "Refund" or "Void." Follow the steps listed. The parent will automatically receive a confirmation email.</p>

### Parent Questions about the SchoolPay Parent Center Account

<p><b>Can I pay for all my kids at once?</b></p>	<p>Yes, you are able to pay for all family members in one session. Parents can add as many items to their shopping cart as they like across all their kids and food service as well (if the district uses the SchoolPay food service module).</p>
<p><b>How do I change my username or password?</b></p>	<p>In the upper right corner of the screen, when a parent is logged into their parent center account, they will see their name. If they click their name a menu appears and they should click on the option that says manage account. The parent will change their email address in the first tab, "Profile Management." The parent's email address is their username.</p> <p>The next tab – with a lock icon – allows the parent to change their password.</p>
<p><b>I forgot my password</b></p>	<p>Direct the parent to SchoolPay.com. The login box, on the screen at schoolpay.com, has a lock icon beneath the "Password field." Clicking the lock icon takes the parent through the process of resetting their password.</p> <p>An email is sent to the parent's email address and that email contains a secure link which finishes the reset process. The email and link must be used in two hours or they expire and a new link must be sent.</p>

<p><b>I forgot my user name</b></p>	<p>In accordance with Payment Industry Data and Security Standards, user names are never resent. There are two choices to support this need:</p> <ol style="list-style-type: none"> <li>1. Reset the password—that will send a password reset link to the user name on file. That will typically jar a memory.</li> <li>2. Create a new parent account</li> </ol> <p>If the parent’s account was created with a typo, please send those requests directly to <a href="mailto:support@schoolpay.com">support@schoolpay.com</a> and we can update the user name.</p>
<p><b>Questions about security and privacy</b></p>	<p>All payment sessions are encrypted with SSL encryption—the industry standard for e-commerce. All account data is stored encrypted in a dedicated secure server at a third-party hosting facility with security monitoring. Security and Privacy policies appear in the Upper, Right-hand corner of every payment page. No email addresses are ever shared or sold to third parties.</p>

**General Payment Questions about process etc.**

<p><b>When do my funds settle?</b></p>	<p>2-3 business banking days usually.</p>
<p><b>Where can I go to view my payment transactions?</b></p>	<p>All payments made from the Parent Center are documented in the account. Click your name in the top right corner and then on “My Orders.”</p>
<p><b>Questions about the payment item itself</b></p>	<p>Direct them to the school or department responsible for the payment item. “They said the shirts were going to be available in red too...” that type question.</p>

**Questions Most Commonly Asked by Administrators**

<p><b>How do I run reports/custom report?</b></p>	<p>Each of these subjects is available via video support from the Reports Icon on the Home Page of your administrator account. How to build custom reports is <b>supported via “show me” video</b> from the Custom Reports submenu (from the Reports Tab).</p>
<p><b>When do funds settle to my accounts?</b></p>	<p>2-3 business banking days.</p>
<p><b>What does PCI mean?</b></p>	<p>Payment Card Industry Data Security Standards (PCI DSS) is the eCommerce industry standard for protecting data. SchoolPay maintains the highest industry standards for protecting data.</p>

<p><b>What does the warning indicator mean next to my payment items?</b></p>	<p>During account configuration, your account was set to offer your preferred payment methods whether or not you were going to accept VISA, MasterCard, Discover, American Express, and electronic check as payment methods, by default. Should you wish to create an exception to those offered payment methods on an item by item basis, an indicator will appear next to the item on your "Payment Items Dashboard", reminding you that you have changed the default payment method on this item.</p>
<p><b>How do I build a Payment or Multi-item Payment item?</b></p>	<p>From the Home screen under the "Payment Items" button, <b>look for the "show me" videos</b> that detail how to build individual payment items as well as multi-item payments.</p>
<p><b>How do batch reports work?</b></p>	<p>Batch reports group your transactions into daily totals by payment method. Transactions are "batched" at midnight central time, each day.</p> <p>It is not possible for us to know exactly when your payments are deposited into your bank account, however, batch reports are a great assistance in reconciliation. Credit card transactions are typically seen in your bank 2 business days after the transaction is made. And ACH transactions are also seen 2 business days later, however more ACH processors cut off daily transactions at 2:00 pm Eastern time. Therefore transactions occurring from 2:00 pm –midnight would carry over to your next day's batches.</p>
<p><b>How can I place an item on a website?</b></p>	<p>Go to "Payment Items" and select your item. To the right of your item is a button that reads "HTML". Select this and the HTML code will be generated for you. This will allow you to link that item to your website. If you only need the URL, select "View item" (magnifying lens) and grab the URL from your address bar.</p> <p><b>**Remember:</b> if you elect to post an item to a website, consider whether you want to also have that item assessable from the Parent Center. Items default to showing in the Parent Center. Therefore if you elect to now show the item, edit your item (final step/optional information/link options) to "not visible in the Parent Center").</p>
<p><b>How do I add to the Chart of Accounts?</b></p>	<p>Go to "Manage Account" and then "Payment Settings," and click "Chart of Accounts."</p> <p>Here, you can manually add an account by entering the number and label. You can also upload a CSV file with this information (Account, Label).</p> <p>You can also Edit/Delete accounts on your list. Scroll down on your list and locate the specific account. On the right hand side, click the pencil icon if you would like to edit the account. Click the red "X" if you would like to delete it.</p>

<p><b>How do I add a Category?</b></p>	<p>Categories allow you to further organize your payments, and also play a fundamental part in setting up administrator roles/permissions.</p> <p>Go to "Manage Account" and "Payment Settings," and then click "Manage Categories." Type in your category name in the box provided, and then click "Add New Category." If you would like to edit a category name, click the pencil icon to the right of the account. If you would like to delete the category, click the red "X" to the right of the category.</p>
<p><b>How do I add another bank account?</b></p>	<p>Please contact your SchoolPay Account manager, who will assist you in adding another account, or "payee." Your account manager will need a copy of a voided check to verify the correct account information.</p>
<p><b>How do I add an administrator account?</b></p>	<p>Go to "Manage Account" and "Administrator Settings," then click Administrator Accounts. Click "New Administrator Account." Enter the administrator's first name, last name, and email address. Then select a role and click "Save."</p>