

# User's Manual for EZSchoolPay Parents

Revision 7 - 09/20/2007

This manual is divided into three chapters:

### 1. Sign-up and Login

This chapter explains the sign-up procedure in detail. It also provides help for issues such as logging in, activation of account and lost password recovery.

### 2. Making Credits

This chapter discusses the tasks related to making credits to your student's accounts. It explains linking and unlinking of students, crediting accounts and maintaining your billing information.

#### 3. Maintenance

This chapter provides help for editing your account information, deleting your account, and other maintenance activities.

Note: Please contact your school if you have further questions regarding <u>EZSchoolPay.com</u>. EZSchoolPay sales and website administration personnel cannot provide tech support. Sorry.

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# Chapter 1

# Sign-up and Login

### **Topics:**

- 1. New user sign up
- 2. Do not have an Activation-Email?
- 3. Existing user login
- 4. Forgot your password?
- 5. Logout

### New user registration with EZSchoolPay.com

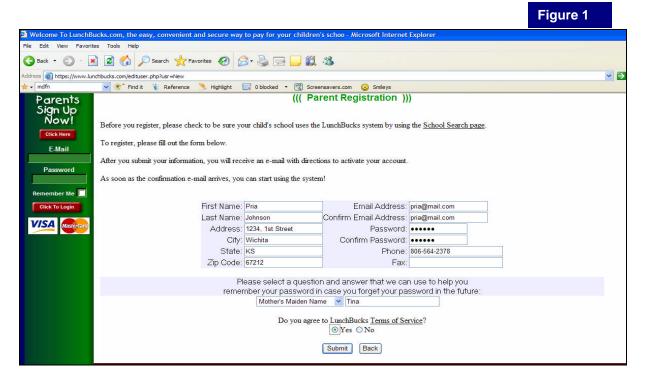
### <u>Step 1</u>:

- I. Go to www.EZSchoolPay.com
- II. Click on the "Click Here" button to begin.



### **Step 2**: **Registration form**

- I. A simple registration form as shown in *Figure 1* will be displayed.
- II. Make sure that you enter a valid E-mail address -- it is necessary to activate your account.
- III. The password needs to be at least 6 characters long (numbers or characters OK).
- IV. Fill in all the details in the form and Click "Submit."



### **Step 3: Successful registration**

- I. If you see the page shown in *Figure 2* below, then you have registered successfully.
- II. You should receive an activation email at the address you entered while completing your registration.



#### Step 4: Activation

You will need to activate your account in order to start using EZSchoolPay.com. The **Activation E-mail** you receive will contain the detailed instructions to activate your account.

## Do not have your activation E-mail?

If you have **lost or deleted** the activation E-mail without activating your account, or if you did not receive it, you can simply <u>resend</u> the activation E-mail to your registered E-mail address with EZSchoolPay.com (see "Resending the Activation E-mail" topic below).

### If you never received an activation E-mail:

- 1. Please check that the E-mail address you registered with <u>EZSchoolPay.com</u> is a valid E-mail address and you are able to receive Internet E-mail at this address.
- 2. If you are using any 'Spam Blocker' program, be sure that it allows you to receive incoming E-mail from EZSchoolPay.com.
- 3. Some E-mail providers, such as Verizon.net, mistakenly mark <u>EZSchoolPay.com</u> email as "spam", and fail to deliver it to your inbox. If you suspect this, please check with your provider.
- 4. **Resend** the activation E-mail to yourself.

### Resending the Activation E-mail:

- 1. Go to www.EZSchoolPay.com
- 2. Enter E-mail address and Password you registered with EZSchoolPay.com
- 3. Click on "Click to Login" button.



4. If your account is not activated, you will see the page shown in *Figure 4*. To receive your activation E-mail, click on the link "Click here"



5. The activation E-mail will be sent to your registered address. Please check the E-mail for further instructions regarding activation.



# **Existing User Login**

You can log into EZSchoolPay.com if,

- 1. You have already registered with EZSchoolPay.com and,
- 2. You have activated your account successfully using the activation E-mail.

If you forgot your password, you can reset your password and <u>EZSchoolPay.com</u> will send you a new password.

### To login:

- 1. Go to www.EZSchoolPay.com
- 2. Enter your registered E-mail address and password.
- 3. Click on the button "Click to Login."



If email and password you entered is valid and your account is activated then you will login successfully into your account with <u>EZSchoolPay.com</u>.

You can use your account to add & remove students, make credits (Chapter 2) and maintain your profile (Chapter 3).

### Forgot your password?

You can reset your password and EZSchoolPay.com will E-mail you a new password.

To reset your password:

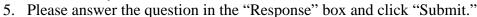
- 1. Go to www.EZSchoolPay.com
- 2. Click on the link "Forgot Password?" shown in Figure 7.



3. You will be asked for your E-mail address. Please enter the E-mail address you registered with EZSchoolPay.com and click on the "Submit" button.



4. You will be asked the "Security Question" you selected while registering with EZSchoolPay.com.





6. If your answer matches with the answer you registered with EZSchoolPay.com, your password will be reset and an E-mail will be sent to you with the new password. You'll know this happened if you see the page shown in *Figure 10*.



# Logout

Make sure that you **logout** from your account after you are done using the account. This will avoid any unauthorized access to your account.

To logout simply click the "Click to Logout" button as shown in Figure 11.



If you do not perform any activity while logged in, you will be automatically logged out from EZSchoolPay after some time for security reasons. To continue working with EZSchoolPay simply login again.

# Chapter 2

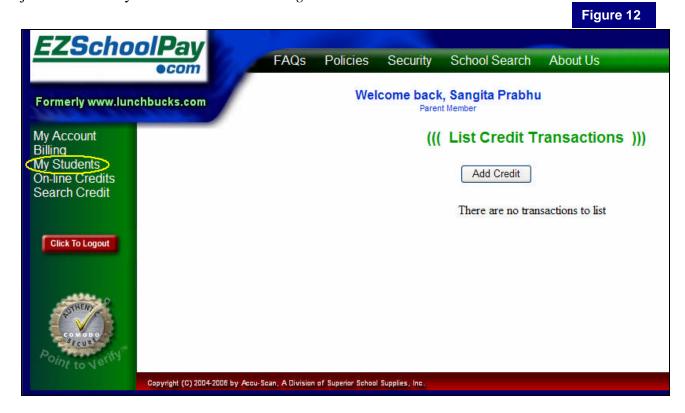
# Managing Students and Making Credits

### **Topics:**

- 1. Managing Students
- 2. On-line Credits
- 3. School Search
- 4. Credit Search

### **Managing Students**

To add or remove students to your accounts, or to contact schools for any student in your account, just click on "My Students" as shown in *Figure 12*.

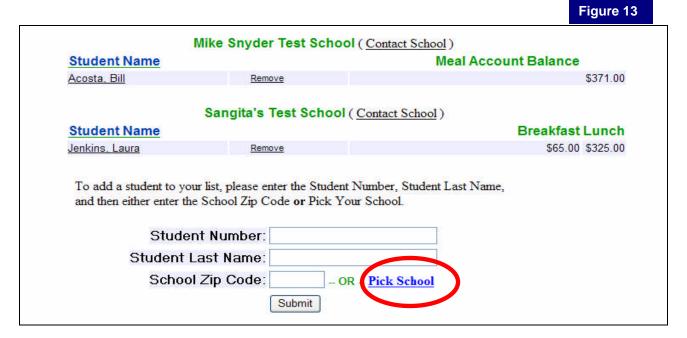


If any students are currently attached to your account, they will be displayed, grouped together by school.

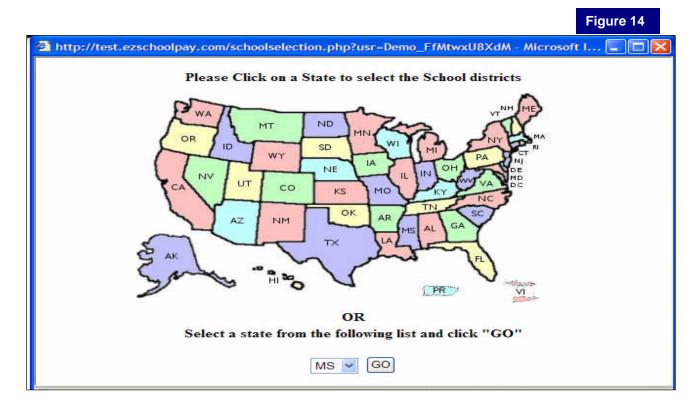
You can **add new students** to your account by entering **Student Number**, **Student Last Name**, and **School Zip Code**, and then clicking the "Submit" button, as shown in *Figure 13*.

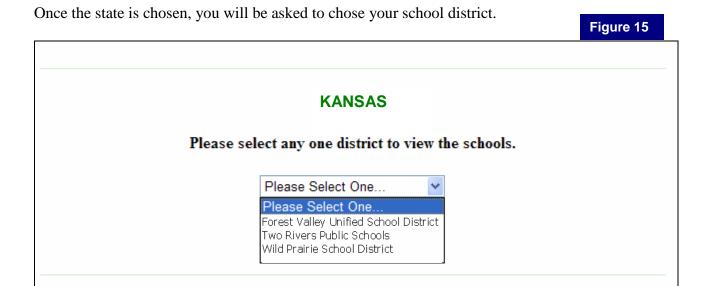
Please contact your student's school for the student number. An easy link to your student's school contact person is available by clicking the "Contact School" link beside the school name.

To **remove existing students** from your account, just click on "Remove" beside the name of the student you wish to remove.



If you do not know the zip code of your school, click on <u>Pick School</u> to select your school. You will be asked to select your state to begin with. You can either click on the appropriate state in the map or select your state from the drop-down list and press the "Go" button to continue (see *Figure 14*).





After the district is selected, you will need to select your school.

KANSAS: Two Rivers Public Schools

Please select a school from the list

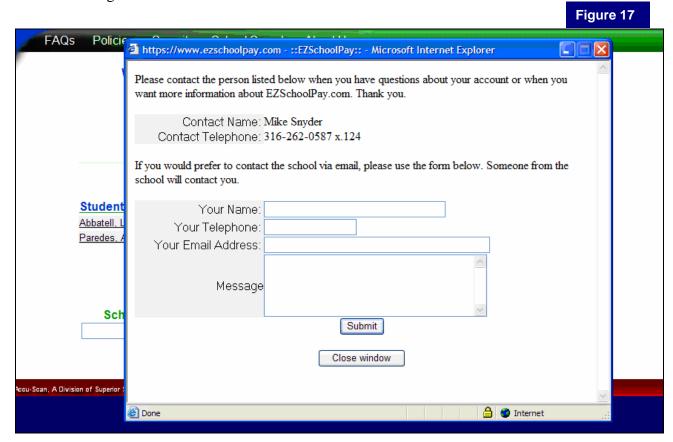
Adams Elementary

Submit Back

Once you click "Submit" after selecting the school, the zip code will be filled in for the selected school. To add the student to your account, simply click on "Submit" after you enter Student Number and Student last name.

You can view contact information for your student's school or send an E-mail to a school by clicking "Contact School" beside the school name.

A new window will appear with the contact information of the school. You can either call the school at the number given or use the form to send an E-mail to the school.



To send an E-mail to the school, type in your name, telephone number, E-mail address, and a brief message in appropriate text boxes. Conclude by clicking the "Submit" button shown in *Figure 17*. Please make sure that your contact information is correct -- the school will use this to contact you.

#### **Online Credits**

There are two types of schools: 1) "Student Sync" schools in which you add your student from an existing database once and the student record is available each time you make a credit (by far the most common) and 2) "Non Student Sync" schools in which you must add the student's name and information with each credit – note that these schools do not automatically add online credits directly into the meal accounting system at the school; a school administrator must manually adjust the balance caused by a new credit.

If you are not sure about which type of school your student belongs to, EZSchoolPay will prompt you appropriately when needed. To make credits, click "Online Credits" in the left side menu (*Figure 18*). If you have made any prior transactions, those will be displayed here.

My Account
My Students
On-line Credits
Search Credit

Click To Logout

To make a new transaction, just click on "Add Credit" shown in *Figure 19*.

All of the active students linked to your account will be displayed here (see *Figure 20*). You can also add more students to this transaction simply by entering their first name, last name, grade and student number.

After you click on "Add", you will be prompted to select your State, District and School respectively.

	((( Li	st Credit Tra	insactions )))	
Add Credit  Credit Detail	Date/Time	Student	Payment/Comment	Status
\$122.00 Approved	07/21/2005	Abbott, Charlie	Dance Class registration \$100.00	Completed
Trx#: 1121962512	11:15:12 AM	Armstrong, Kelsey	Second Test Bus fees \$20.00	Completed
TIAM. TIETOOEGIE		Chau, Nathan	Meal Account Credit \$2.00	Pending
				3.0
\$50.00 Approved	07/18/2005	Abbott, Charlie	Meal Account Credit \$10.00	Pending
Trx#: 1121724594	05:09:55 PM	Armstrong, Kelsey	Second Test Bus fees \$20.00	Completed
		Chau, Nathan	Year book fees \$20.00	Completed

Depending on your school synchronization type, either the student will be linked to your account or will be added to the transaction as an additional student. The linked student will appear under "My Students" menu selection and will automatically be available for future transactions.

An Additional Student is only part of the current transaction (is part of a "Non Student Sync" school; these credits are not automatically added to the school's meal accounting system – instead a manual adjustment to the balance by school personnel is necessary). This student will not automatically appear for future transactions, but must be added again manually each time.

Figure 19

	Linked Stud	dents			
	Acosta, Bill	1667	Mike Snyder Test School		
	Jenkins, Laura	485	Sangita's Test School		
	Additional S	Students			
	Additional S	Students 1234	Jackman Middle School F	<u>Remove</u>	
Last Name	Myers, Mili		Jackman Middle School <u>F</u>	Remove ent Number	

You can remove an additional student simply by clicking on "Remove".

If you do not wish to add any more students to this transaction, simply click on "Proceed to Online Credits" to pay for existing students.

All of the students linked to your account will be displayed here (see *Figure 21*). You can make a credit to some or all of them at the same time. If your child's school has set up any "Special Payments" you will see them listed here (for instance, Dance Class Registration, Back-To-School Portraits, Locker Fee, etc). Leave blank any fee you don't wish to pay as part of this transaction, or which doesn't pertain to the listed student(s).

If the schools have provided extra information about a payment (comments or special instructions), the payment name will be marked with a "\*" to indicate a footnote. The corresponding information will be displayed at the bottom of the screen.

For all fees except "Meal Account", a text box to enter "Notes/Comments" will be displayed. The comment you enter here will be sent to your child's school, along with the payment. This is useful, for instance, if the school has requested additional information about your payment. (Note: no comment can be entered for "Meal Account" credits, simply because these amounts are imported directly and automatically into your school's meal accounting program.)

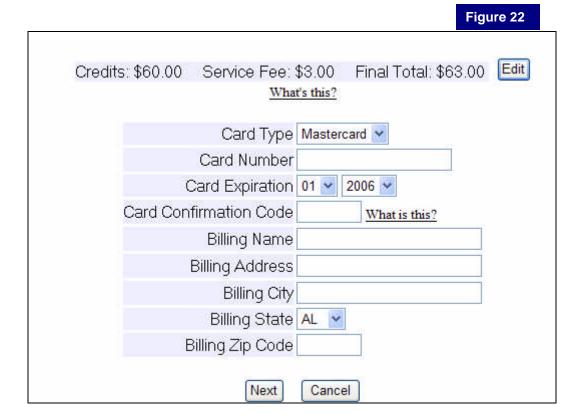
To provide a credit, simply enter the desired amounts in the boxes beside each applicable payment name. Then, click "Next" to continue.

To cancel the transaction instead, click "Cancel" to return to the Transactions List page.

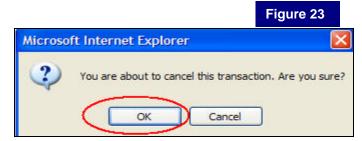
Acosta, Bill- Mike Snyo	der Test School	
Meal Account Credit:	0.00	
Test Payment*:	0.00	
Jenkins, Laura- Sangi	ta's Test School	Note/Comment to School (If Any)
Breakfast Credit Amount:	0.00	
Lunch Account Credit:	0.00	
Dance Class Fees*:	0.00	
Test Payment*:	0.00	
Myers, Mili- Alden Taka	aki Demo	
Meal Account Credit:	0.00	

IMPORTANT: "Special Payments" (anything other than "Meal Account" credits) are displayed only if your child's school has set up any such payment with <a href="EZSchoolPay.com">EZSchoolPay.com</a>. Otherwise, you will just see options to enter Meal Account credits for each student. Check with your school if you would like the ability to pay for other school fees online.

After you enter the amount you wish to pay, you will be required to enter the credit card/debit card information as shown in *Figure 22*. The page will also display the Credit amount, Processing fee and the total charges you will pay. You can edit the credit amount by clicking on "Edit".



If you wish to cancel this transaction, you can do so by clicking on "Cancel". You will be prompted for a confirmation to cancel the transaction (*Figure 23*). Click "OK" if you wish to cancel the transaction.



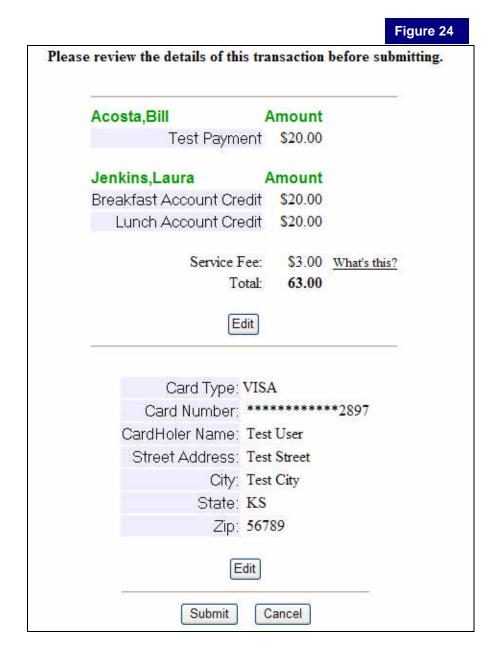
Once you have entered all the financial information and you wish to continue with the credit transaction, click "Next" to continue.

**NOTE:** Due to security guidelines EZSchoolPay.com cannot save your financial information for future transactions. This is in keeping with the security requirements of PCI (Payment Card Industry) Compliance. This means you will have to enter your credit card information every time you pay using EZSchoolPay.com.

The details of your transaction will be displayed for your review, as shown in *Figure 24*. Review these details carefully before hitting "Submit". You can still cancel the transaction by clicking on "Cancel" button.

To edit credit amount or billing information, click on "Edit" button.

After you confirm all the transaction details, click on "Submit" to process this transaction.



After transaction is processed, the results will be displayed.

Status of the transaction will either be *Approved* or *Not Approved*. *Figure 25* illustrates the results of an Approved transaction.

#### **Please note:**

- 1) Transaction Processing may take few seconds be patient.
- 2) If your transaction is Not Approved, it may be that you have entered some information incorrectly. If you are certain that you have entered all information correctly and the transaction is Not Approved, you should contact your bank or card issuer.

### Welcome back, Sangita Prabhu

Parent Member

## ((( Transaction Status )))

We are processing transaction # 1138050374.

This could take several seconds...please be patient.

If the transaction does not finish within 45 seconds, please click HERE.

# Your transaction was approved.

Click <u>HERE</u> to see a receipt.

Click **HERE** to return to your list of transactions.

If your transaction was approved then you have successfully credited your student's account. If your student's school is a "Student Sync" school the credit will be automatically added to your student's meal account balance the next time a synchronization occurs (typically within 15 minutes if the cafeteria computer is on). Remember, though, each school may opt to receive credits on differing schedules. Credits made during the night or on weekends or holidays may not appear in your child's meal account right away, if the school has shut down their EZSchoolPay processing.

You can either click to see a receipt for your transaction or can click to return back to "Transactions List" page. If you choose to see a receipt, this is how it will appear:

Figure 26 Student ID Student Status\* Amount 314 Abbott, Charlie 100.00 Completed School: Mike's Test School Payment: Dance Class registration Comment: Batch #145 314 Abbott, Charlie 20.00 Pending School: Mike's Test School Payment: Meal Account Credit RUNNING1 100.00 Armstrong, Kelsey Completed School: Mike's Second Test School Payment: Back-to-School Portraits Comment: Full Pack NBDCHAU546 Chau, Nathan 100.00 Completed School: LunchBucks Test School Payment: Bus fees Service Fee: \$19.20 What is Service Fee? Total: \$339.20 \* "Status" indicates whether this credit has been received by the school and is available for use. Pending - Not yet sent to the school. Received - Sent to the school, but not yet available. Available - Money is available to use. Completed - The school has been notified about this "Non-Meal" credit. Close window Print receipt

Click on "Print receipt" to print a paper copy of your receipt. Click on "Close Window" to close this receipt.

If you click to return to the list of transactions, you will be taken to the "Transactions List" page, which displays all your transactions (*Figure 27*).

				i iguie zi
	((( Li	st Credit Tra	insactions )))	
Add Credit				
Credit Detail	Date/Time	Student	Payment/Comment	Status
\$320.00 Approved	07/25/2005	Abbott, Charlie	Meal Account Credit \$20.00	Pending
Trx#: <u>1122304826</u>	10:20:52 AM	Abbott, Charlie	Dance Class registration \$100.00 Batch #145	Completed
		Armstrong, Kelsey	Back-to-School Portraits \$100.00 Full Pack	Completed
		Chau, Nathan	Bus fees \$100.00	Completed
\$122.00 Approved	07/21/2005	Abbott, Charlie	Dance Class registration \$100.00	Completed
Trx#: 1121962512	11:15:12 AM	Armstrong, Kelsey	Second Test Bus fees \$20.00	Completed
TIAN. TIETOUZUTE		Chau, Nathan	Meal Account Credit \$2.00	Pending
\$50.00 Approved	07/18/2005		Meal Account Credit \$10.00	Pending
Trx#: 1121724594	05:09:55 PM	Armstrong, Kelsey	Second Test Bus fees \$20.00	Completed
TIAN. TIETTETOOT		Chau, Nathan	Year book fees \$20.00	Completed

To view the details of the transaction simply click on the transaction number (TRX #) link.

### **School Search**

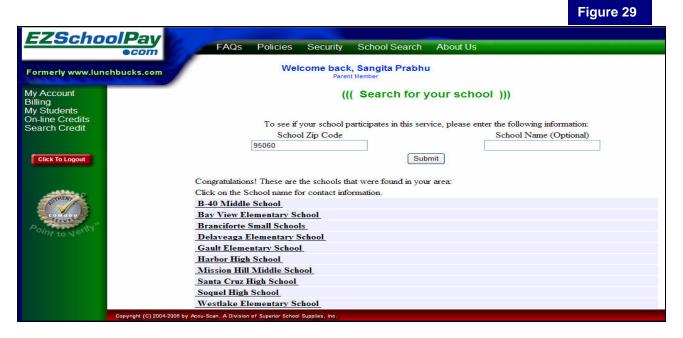
To search for a school's contact information click on "School Search" from the top menu selection.



Figure 27

You will be asked for School Zip code and School name. School name is optional. If you do not enter a school name, you will see all the schools with the specified zip code. Click "Submit" to complete the search.

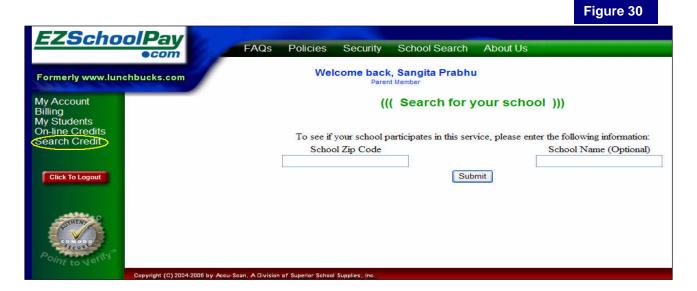
All the schools in the specified zip code will be displayed. If you specified the name of the school, then only schools matching that search will be shown.



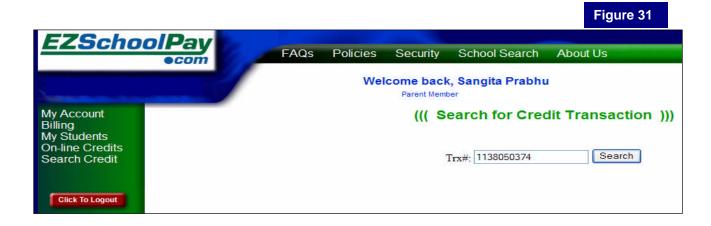
Click on the school name to view its contact information. Note: You can also view a school's contact information using the link that appears above the names of students already linked to your account, on the "List Students" screen.

#### **Credit Search**

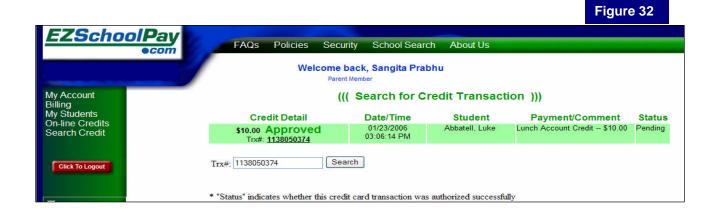
To search for a past credit transaction, click on "Search Credit" (Figure 30).



You will be asked to enter your transaction number. (You can always view all your transactions by clicking on "Online Credits"). Enter the transaction number to locate, and click the "Search" button.



The transaction will be displayed with the summary as shown in *Figure 32*. You can click on the transaction number (TRX #) to see the receipt.



# Chapter 3

## **Maintenance**

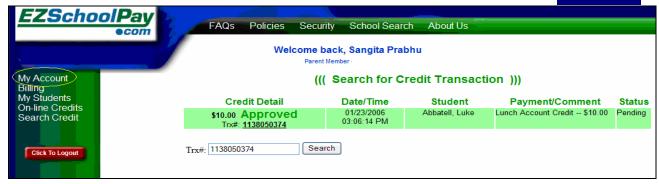
### **Topics:**

- 1. View or edit your account profile
- 2. Delete your account

### View or edit your account profile

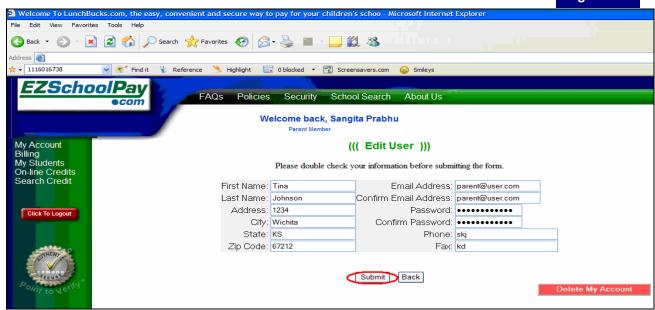
- 1. Go to www.EZSchoolPay.com
- 2. Enter your E-mail and password and click "Click to Login" (For more information on login refer chapter 1)
- 3. Once you login successfully, Click on "My Account" to view your profile.

Figure 33



You can edit your information and then click "Submit" to confirm the changes. If you do not wish to edit anything, simply click "Back." (See *Figure 34*).

Figure 34



# **Delete your Account**

You can delete your account simply by clicking on the "Delete My Account" button available in the lower right corner of your account edit screen (shown in *Figure 34*). You will be asked for a confirmation before deleting the account. If you do not wish to delete the account, click "No". If you are sure to delete the account then click "Yes".



If you click "YES" your account will be permanently deleted from <u>EZSchoolPay.com</u> along with all your information, transactions and linked students. You will have to register again in order to use the service. Note that any pending credits will still be processed.