User's Manual for EZSchoolPay Parents

Revision 6 – 08/24/2006

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 revolves around all the features related to making credits to your student's accounts. It explains linking and unlinking of students, crediting their accounts and maintaining your billing information.

3. **Maintenance**
   This chapter covers editing your account information, deleting your account and other maintenance activities.

Note: Please contact your school if you have further questions regarding EZSchoolPay.com.

EZSchoolPay sales and website administration personnel cannot provide tech support. Sorry.

TABLE OF CONTENTS

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

Step 1: **Select to Sign Up**

1. Go to www.EZSchoolPay.com
2. Click on the button "Click Here" for parent sign up.

Step 2: **Registration form**

1. A simple registration form as shown in the figure below will be displayed.
2. Make sure that you enter a valid E-mail address as it is necessary to activate your account.
3. The password needs to be at least 6 characters long
4. Fill in all the details in the form and Click "Submit"

Step 3: Successful registration

1. If you see the page shown in the figure below, then you have registered successfully.
2. You should receive an activation email at the email address you entered while completing your registration.
3. Be sure to activate your account using the activation E-mail in order to use it.

Step 4: **Activation**

   You will need to activate your account in order to start using it. The **Activation E-mail** you receive from EZSchoolPay.com 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 **resend** the activation E-mail to your registered E-mail address with EZSchoolPay.com.

If you never received an activation E-mail:

1. Please check that the E-mail address you registered with EZSchoolPay.com 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 EZSchoolPay.com 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 the figure below.
   To receive your activation E-mail, click on the link "<u>Click here</u>"

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. Activated your account successfully using the activation E-mail.

If you forgot your password, you can reset your password and EZSchoolPay.com 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 EZSchoolPay.com.

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:
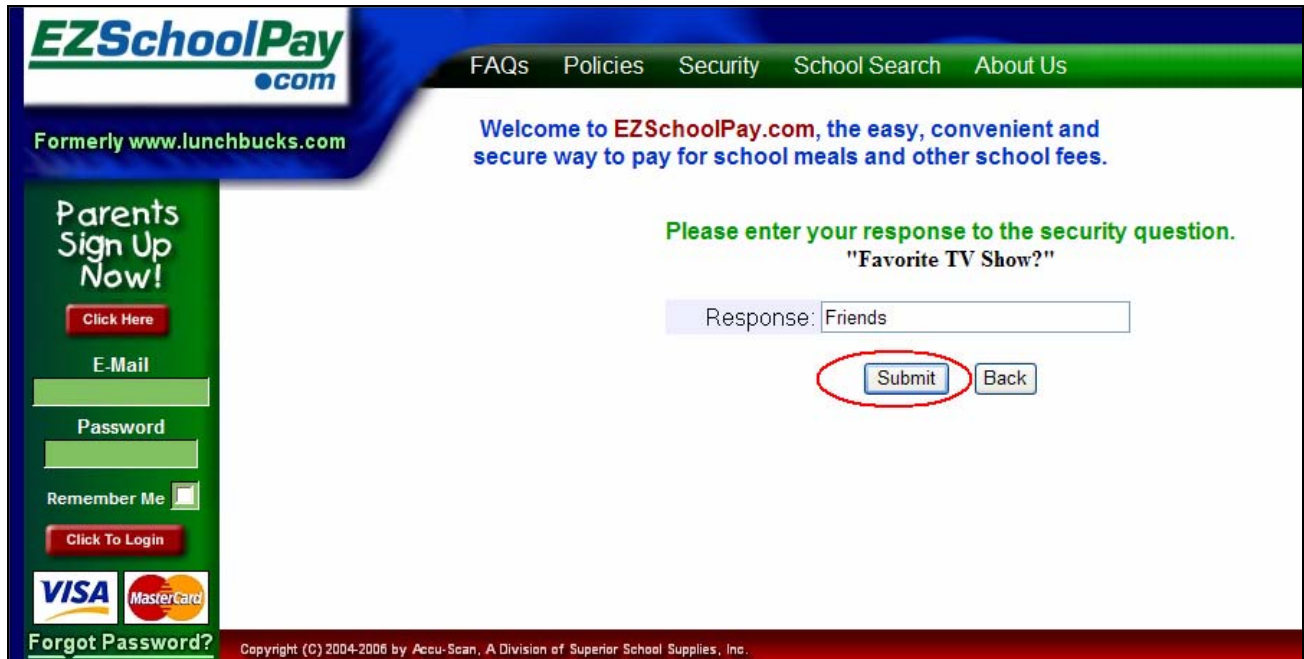
1. Go to www.EZSchoolPay.com
2. Click on the link "Forgot Password?"

3. You will be asked for your E-mail address. Please enter the E-mail address you registered with EZSchoolPay.com and click on "Submit"
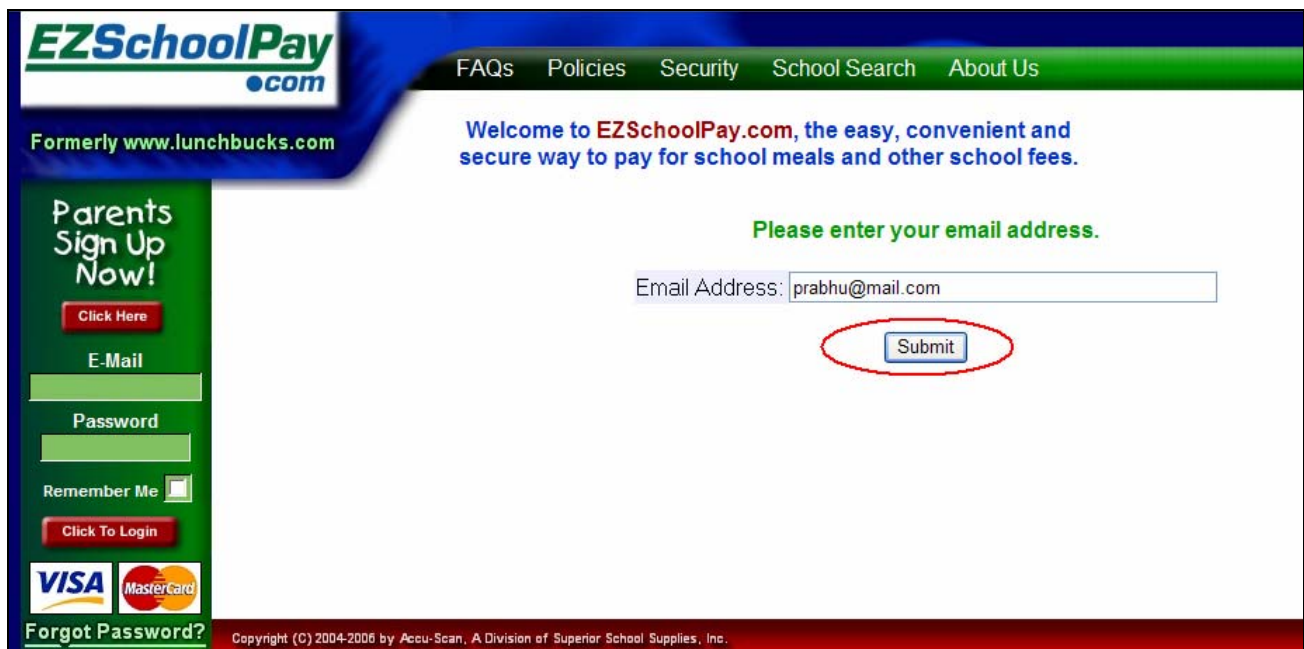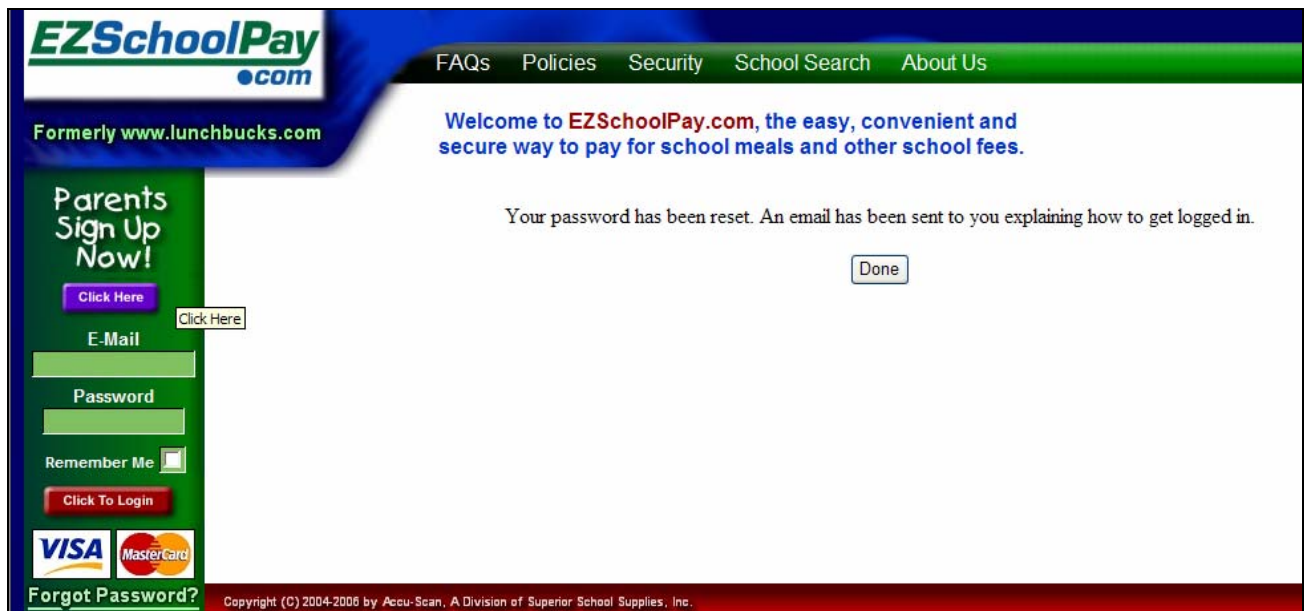
4. You will be asked the "Security Question" you selected while registering with EZSchoolPay.com.
5. Please answer the question and Click "Submit"

6. If your answer matches with answer you registered with EZSchoolPay.com, your password will be reset and an E-mail will be sent to you with the new password.

Logout

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

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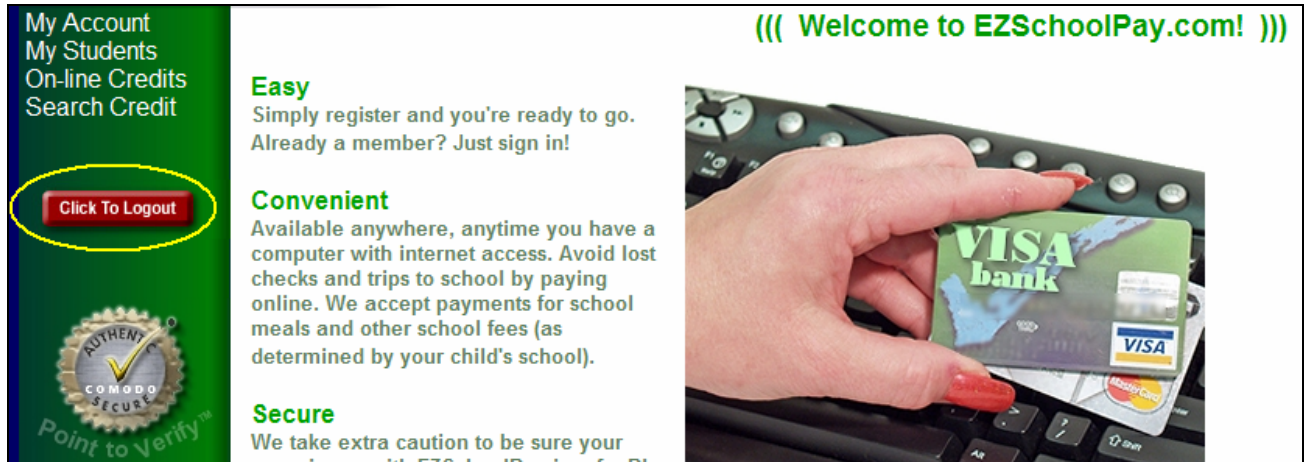
If you do not perform any activity while logged in, you will be automatically logged out from EZSchoolPay after some time for security reasons. To continue working with EZSchoolPay simply login again.

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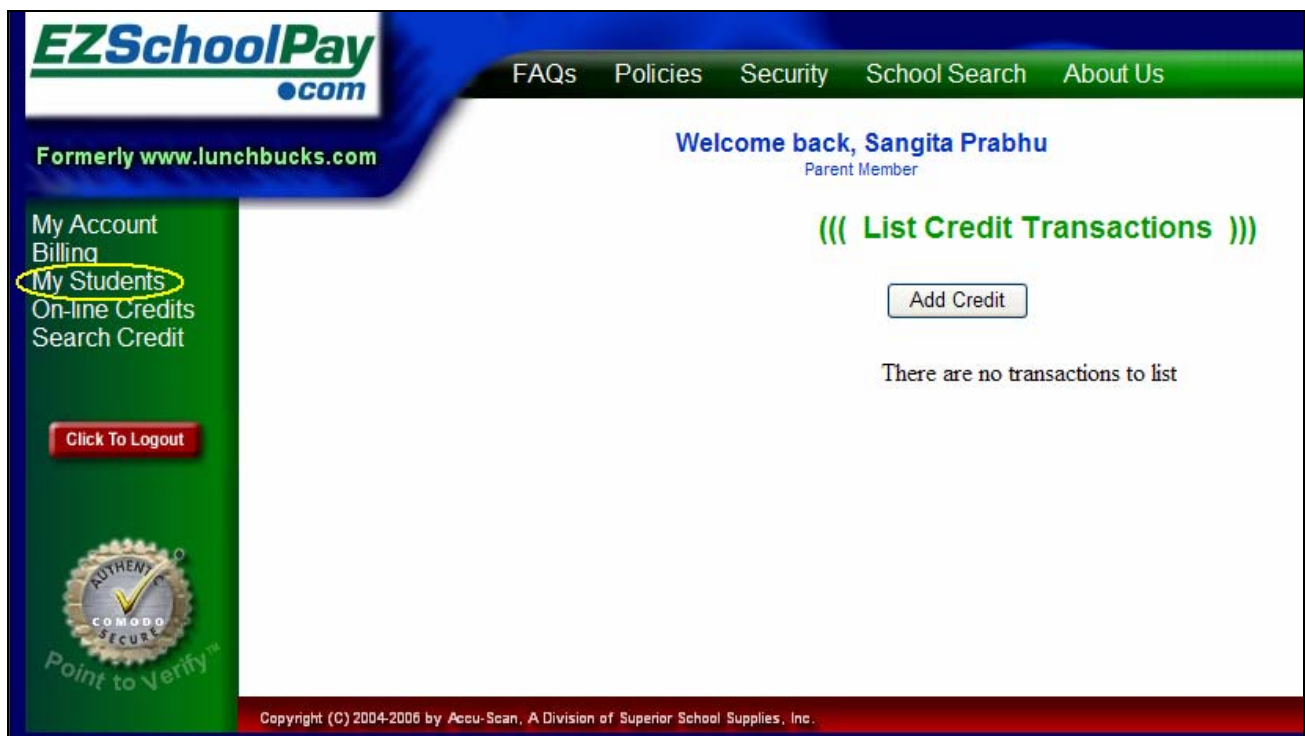
If any students are currently attached to your account, they will be displayed grouped together by school.

You can **add new students** to your account just by entering **school zip code**, **student ID** and **student last name** and clicking on "Submit" .

Please contact your school for student IDs. You can contact the schools for the students already existing students in your account simply by clicking the "Contact School" link besides the school name. If you do not have any students in your account or you are trying to add a student for a different school than the students already in your account, you can use "School Search" to locate the school contact information.

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

Mike Snyder Test School (Contact School)

Student Name		Meal Account Balance
Acosta, Bill	Remove	$371.00

Sangita's Test School (Contact School)

Student Name		Breakfast	Lunch
Jenkins, Laura	Remove	$65.00	$325.00

To add a student to your list, please enter the Student Number, Student Last Name, and then either enter the School Zip Code **or** Pick Your School.

Student Number: [   ]
Student Last Name: [   ]
School Zip Code: [   ] -- OR -- **Pick School**

[Submit]

If you do not know the zip code of your school, just click on **Pick School** 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.

http://test.ezschoolpay.com/schoolselection.php?usr=Demo_FfMtwxU8XdM - Microsoft I...

Please Click on a State to select the School districts
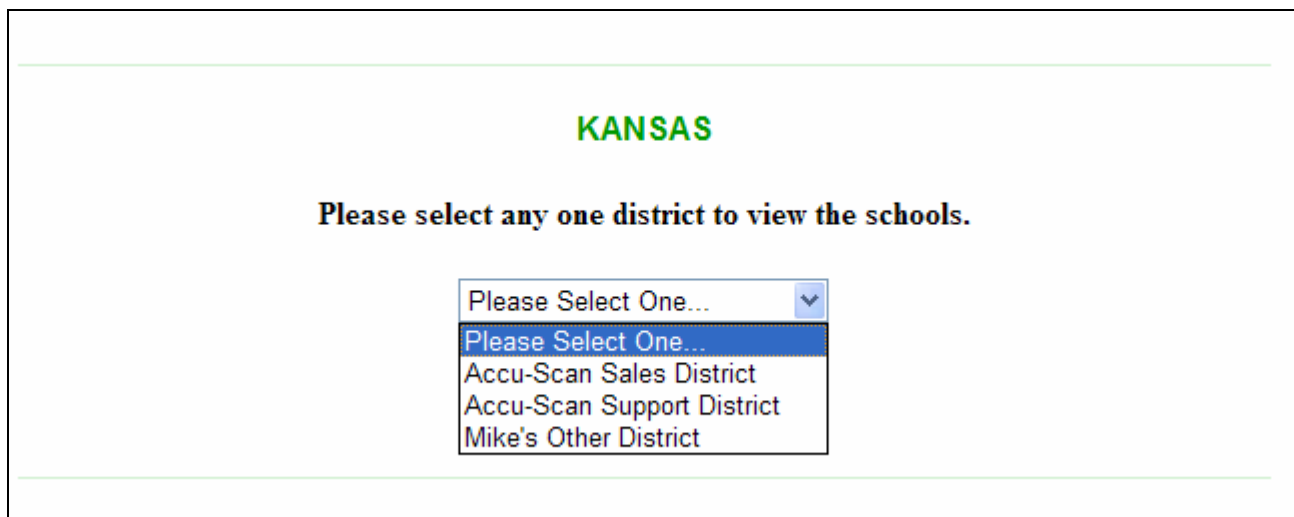
OR
Select a state from the following list and click "GO"

[MS ▾] [GO]
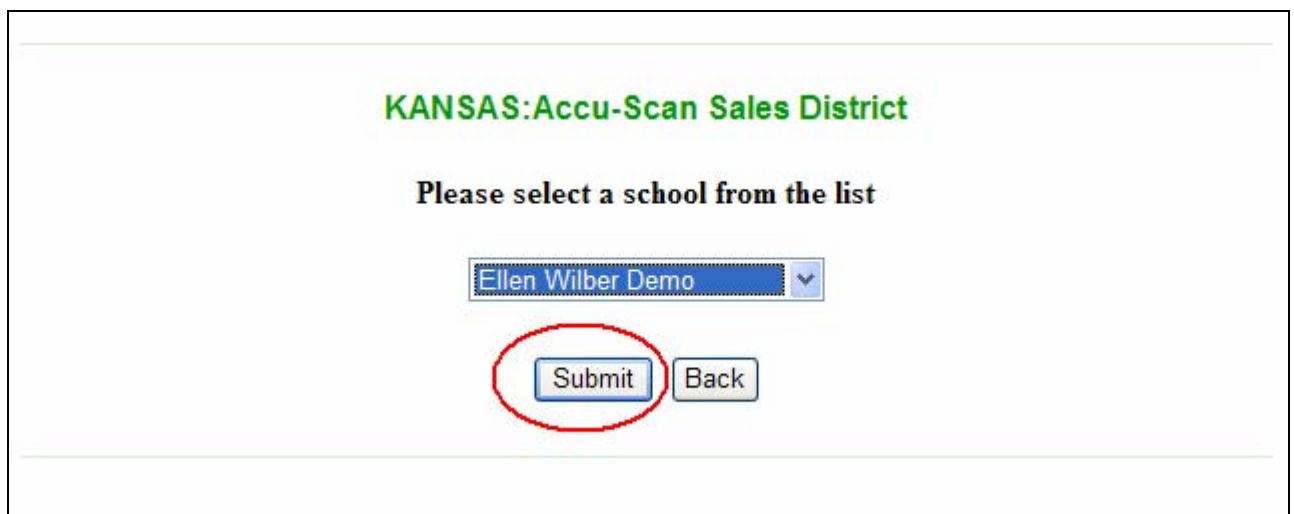
Once the state in chosen, you will be asked to chose your school district.

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

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 of the school of the students in your account or send an E-mail to a school just by clicking "Contact School" besides 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, Just type in your name, telephone number, E-mail address and a brief message in appropriate text boxes and click "Submit". Please make sure that your contact information is correct as the school will try to contact you using this information.

Online Credits

To make credits to a student account for a "Student Sync" school, the student must be linked to your account. "Student Sync" school is one for which EZSchoolPay has student information.

However, you can pay for the students from "Non Student Sync" schools directly by adding them to the transaction.

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 on "Online Credits" in the left side menu.
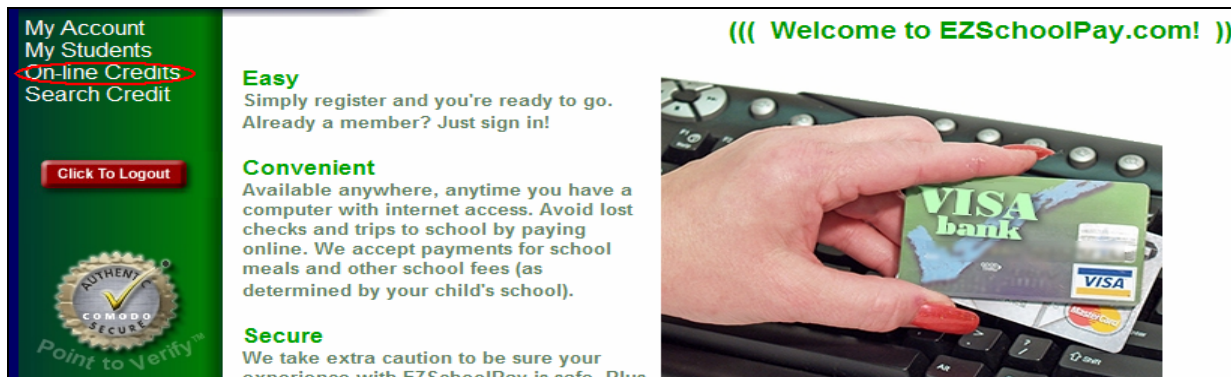
If you have made any prior transactions, those will be displayed here.

To make a new transaction, just click on "Add Credit"

All of the active students linked to your account will be displayed here. 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.

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" section and will automatically appear in all the future transaction. However, the additional student just is part of the current transaction.

Linked Students

Acosta, Bill	1667	Mike Snyder Test School
Jenkins, Laura	485	Sangita's Test School

Additional Students

Myers, Mili	1234	Alden Takaki Demo	Remove

Last Name	**First Name**	**Grade**	**Student Number**	
				Add

[Proceed to online credits] [Cancel]

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. 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 Point-of-Sale 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.

(((Add Credits for Students)))

Acosta, Bill- Mike Snyder Test School

Meal Account Credit: `0.00`

Test Payment*: `0.00`

Jenkins, Laura- Sangita'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 Takaki Demo

Meal Account Credit: `0.00`

*Test Payment- This is a test payment that goes here.

*Dance Class Fees- specify Batch evening or morning

NOTE: The total credit amount must be $5.00 or more

[Next] [Cancel]

IMPORTANT: "Special Payments" (anything other than "Meal Account" credits) are displayed only if your child's school has set up any such payment with EZSchoolPay.com. 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 information as shown in the figure below. The page will also display the Credit amount, Processing fee and the total charges you will pay. You can edit this amount by clicking on "Edit".
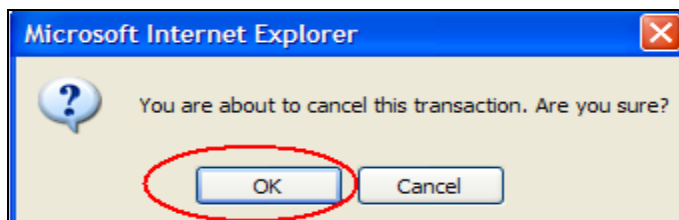
If you wish to cancel this transaction, you can do so by clicking on "Cancel". You will be prompted for a confirmation to cancel the transaction. Click "OK" if you wish to cancel the transaction.

Once you have entered all the financial information, click "Next" to continue.

NOTE: We no longer provide an option to save you financial information with us due to 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.

All the details of your transaction will be displayed for your review. 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 in the corresponding sections.

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

Please review the details of this transaction before submitting.

Acosta,Bill	Amount
Test Payment	$20.00

Jenkins,Laura	Amount
Breakfast Account Credit	$20.00
Lunch Account Credit	$20.00

Service Fee:	$3.00	What's this?
Total:	**63.00**	

Edit

Card Type:	VISA
Card Number:	*************2897
CardHoler Name:	Test User
Street Address:	Test Street
City:	Test City
State:	KS
Zip:	56789

Edit

Submit   Cancel

After transaction is processed, the results will be displayed.

Status of the transaction can be either *Approved* or *Not Approved* as shown in the figure below. Please note that Transaction Processing may take few seconds.

Welcome back, Sangita Prabhu
Parent Member (Demo Mode)

(((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 HERE 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 and the school will receive money shortly. 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:

Student ID	Student	Amount	Status*
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	Armstrong, Kelsey	100.00	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.

Print receipt   **Close window**

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.

(((List Credit Transactions)))

[Add Credit]

Credit Detail	Date/Time	Student	Payment/Comment	Status
$320.00 Approved Trx#: 1122304826	07/25/2005 10:20:52 AM	Abbott, Charlie	Meal Account Credit -- $20.00	Pending
		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 Trx#: 1121962512	07/21/2005 11:15:12 AM	Abbott, Charlie	Dance Class registration -- $100.00	Completed
		Armstrong, Kelsey	Second Test Bus fees -- $20.00	Completed
		Chau, Nathan	Meal Account Credit -- $2.00	Pending
$50.00 Approved Trx#: 1121724594	07/18/2005 05:09:55 PM	Abbott, Charlie	Meal Account Credit -- $10.00	Pending
		Armstrong, Kelsey	Second Test Bus fees -- $20.00	Completed
		Chau, Nathan	Year book fees -- $20.00	Completed

You can click on any transaction number (in the leftmost "Credit Detail" column) to view the receipt for that transaction.
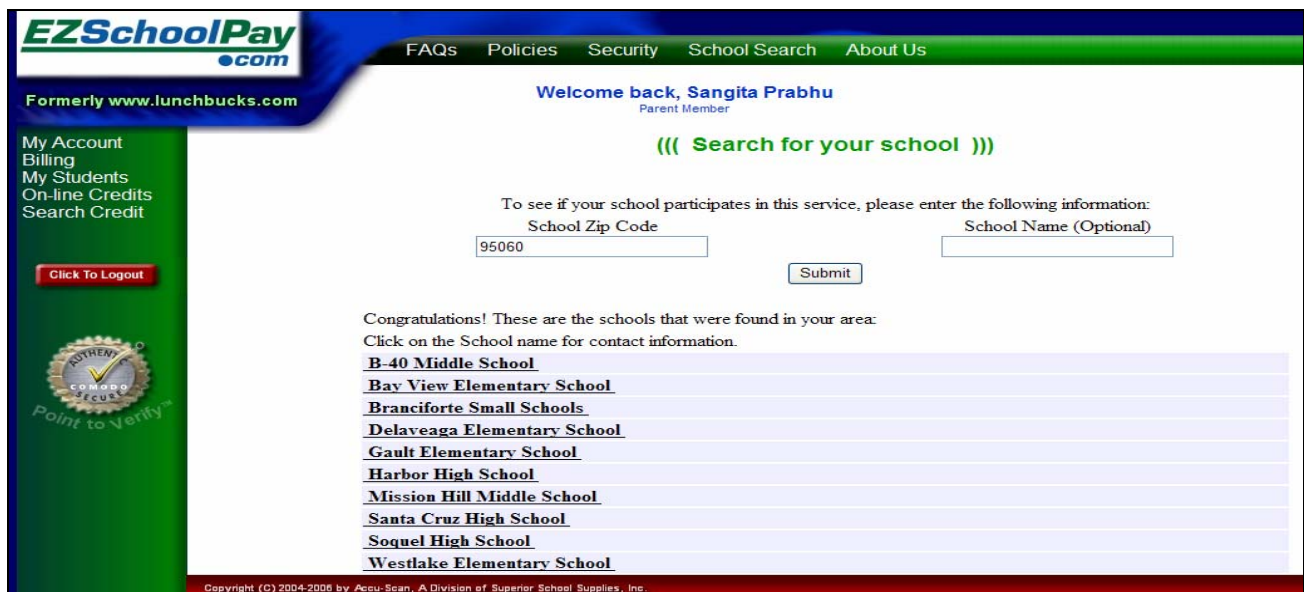
School Search

To search for a school's contact information simply click on "School Search" at the top.

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 past credit transaction, Click on "Search Credit". You must be logged into the site.

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 hit the "Search" button.

The transaction will be displayed with the summary as shown in the figure below. You can click on the transaction number 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.

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

Delete your Account

You can delete your account simply by clicking on "Delete My Account" button available in the lower right corner of your account edit screen, as shown above.

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 EZSchoolPay.com 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.