Managing Payment Information

April 2013

Managing Payment Information

☑ This document is written for use by parents. Districts can choose to provide this information to their parents or use it as a guide for creating district-owned documentation.

Overview

Online Payment functionality allows the ability to register, modify and delete payment methods. These tools enable a transaction to occur and provide users with the ability to manage their online accounts.
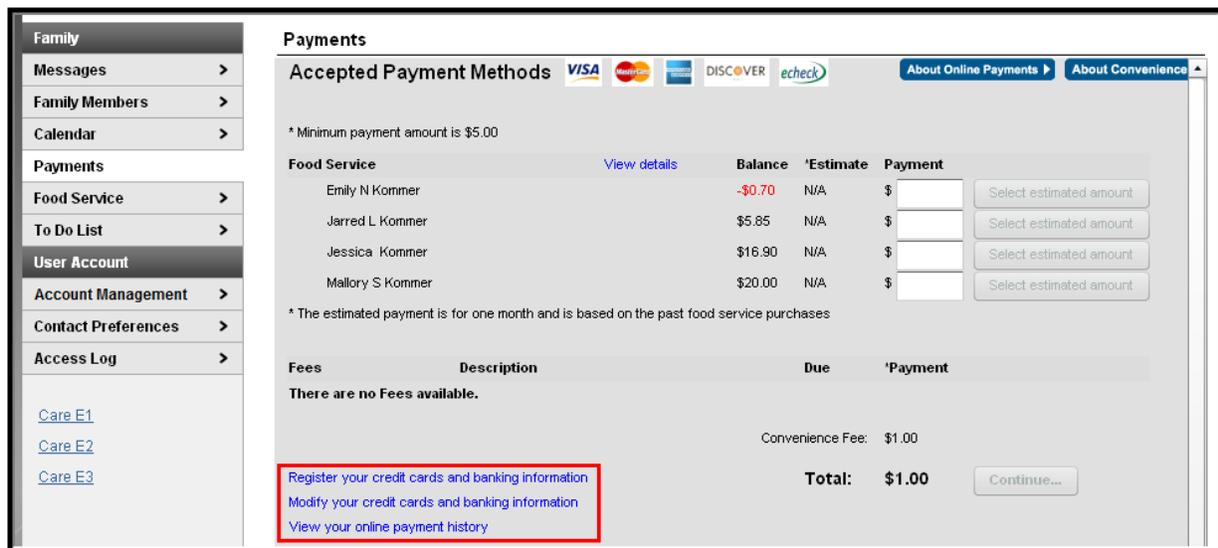
Image 1: Registering / Modifying / Deleting Payment Information

Registering Payment Information

PATH: *Portal > Payments*

Before a user is able to make an online payment, a payment method needs to be established. Users have the option of paying by credit card, checking account or savings account. To begin registering a payment method, select the **Register Your Credit Cards and Banking Information** hyperlink.
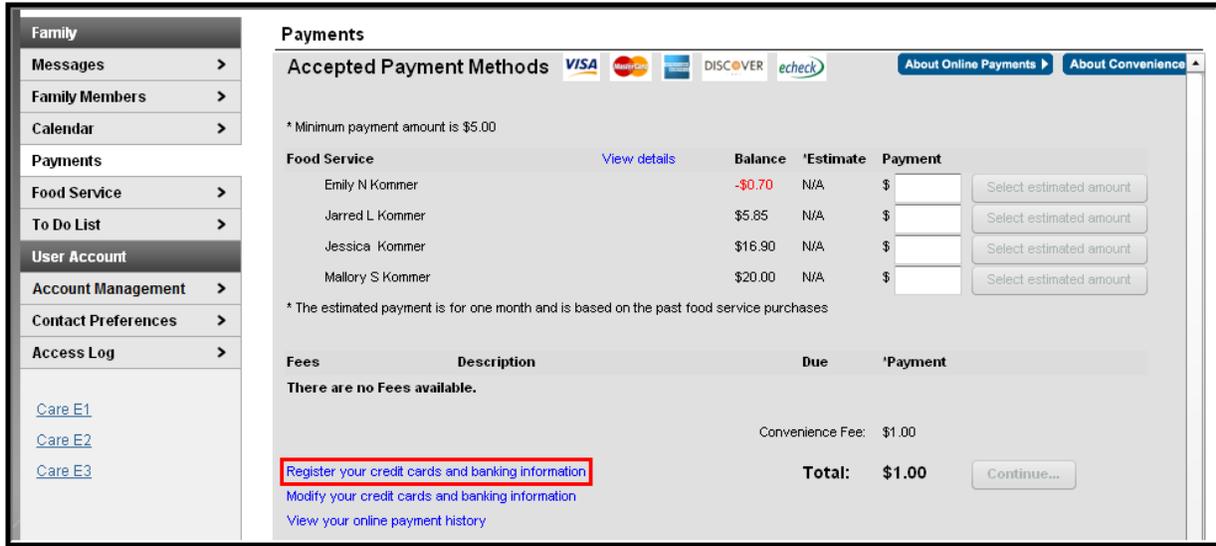
Image 2: Registering a Payment Method

Registering Checking Information

Users have the ability to register and make payments via a checking account. To begin the registration process, select the **Checking** radio button.

Image 3: Registering a Checking Account Payment Method

Enter all required Billing Information as well as the checking account's **Routing Number** and **Account Number**. Once information has been entered, select the **Save** button. Users will be directed to a confirmation screen.

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Image 4: Registered Payment Method Confirmation

Carefully read and determine if all displayed information is correct. If so, select the **Save** button. The payment method is now saved within Infinite Campus and can now be used to make transactions. If information is incorrect, select the **Back** button. Users will be redirected back to the previous page, allowing for information to be adjusted.

Registering Savings Information

Users have the ability to register and make payments via a savings account. To begin the registration process, select the **Savings** radio button.

Image 5: Registering a Savings Account Payment Method

Enter all required Billing Information as well as the saving account's **Routing Number** and **Account Number**. Once information has been entered, select the **Save** button. Users will be directed to a confirmation screen.

Image 6: Registered Payment Method Confirmation

Carefully read and determine if all displayed information is correct. If so, select the **Save** button. The payment method is now saved within Infinite Campus and can now be used to make transactions. If information is incorrect, select the **Back** button. Users will be redirected back to the previous page, allowing for information to be adjusted.

Registering Credit Card Information

Users have the ability to register and make payments via a major credit/debit card. To begin the registration process, select the **Credit/Debit Card** radio button.

Image 7: Registering a Credit Card Payment Method

Enter all required Billing Information as well as the **Card Number**, **Expiration Date** and **Name of Cardholder**. If the **Card Number** is incorrect, the field will highlight in red and a red exclamation point will appear. Selecting the red exclamation point will generate a separate window describing the error that has occurred.

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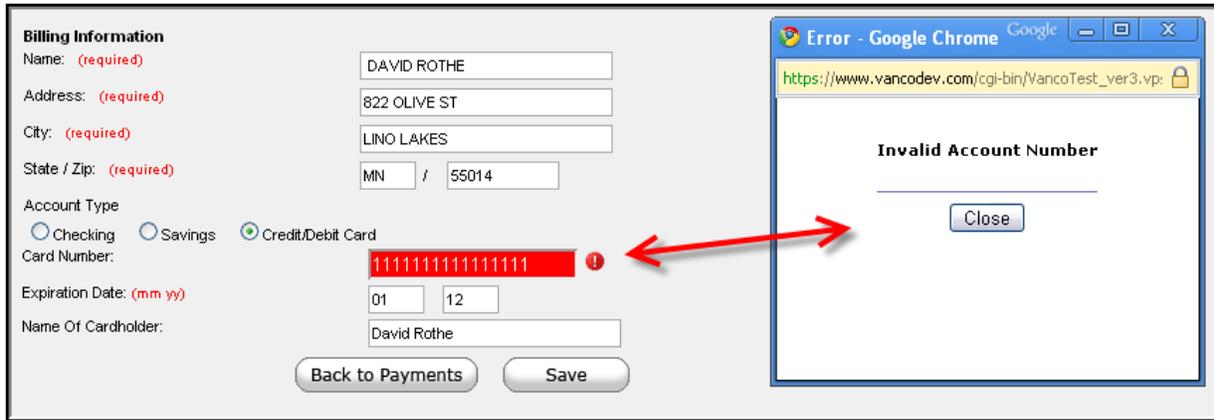
Image 8: Incorrect Credit Card Information

Once correct information has been entered, select the **Save** icon. The credit card is now established within Infinite Campus and may be used for transactions.

Image 9: Registered Payment Method Confirmation

Modifying Payment Information

PATH: *Portal > Payments*

Users have the ability to modify registered payment methods by selecting the **Modify Your Credit Cards and Banking Information** hyperlink.

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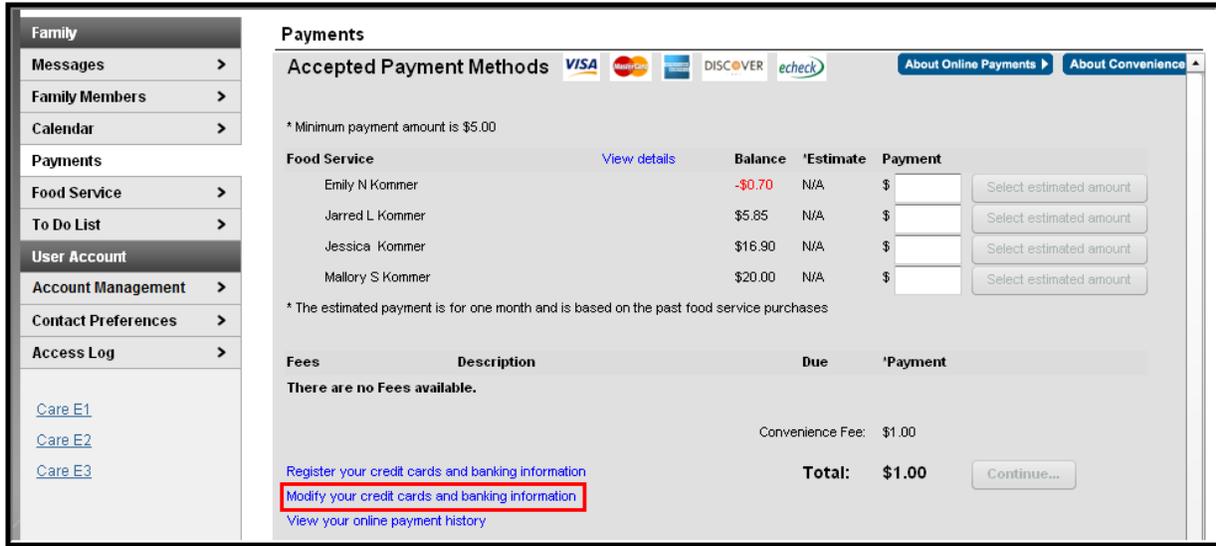
Image 10: Modifying a Registered Payment Method

Once selected, users are directed to a new screen displaying all registered payment methods. To edit a payment method, select the corresponding **Edit** button.
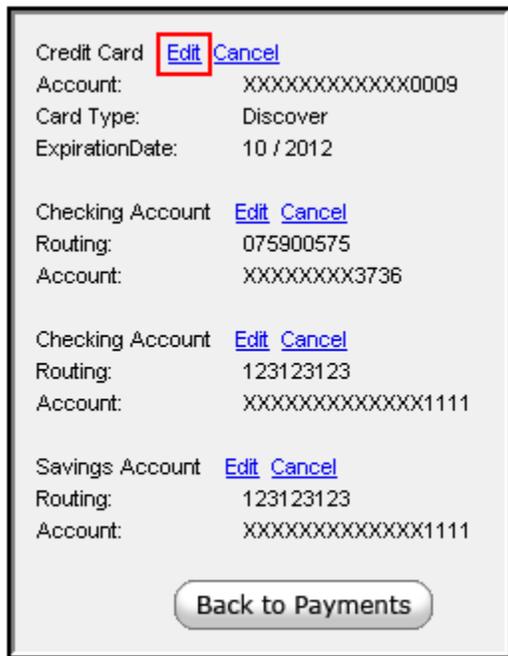
Image 11: Editing a Registered Payment Method

Once the **Edit** button is selected, users are directed to the Billing Information editor where information can be modified.

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Image 12: Entering Correct Payment Method Information

Once all modifications have been made, select the **Save** button. Users are directed to a confirmation screen.

Image 13: Confirming Edited Payment Method Information

Ensure all payment method information is accurate and select the **Save** button. Users are directed to a screen confirming the payment method update was successful. If information is incorrect, select the **Back** button. Users will be directed back to the Billing Information editor, allowing for information to be modified.

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Image 14: Confirmation of Edited Payment Method

Deleting Payment Information

PATH: *Portal > Payments*

Payment methods can be deleted by selecting the **Modify Your Credit Card and Banking Information** hyperlink.
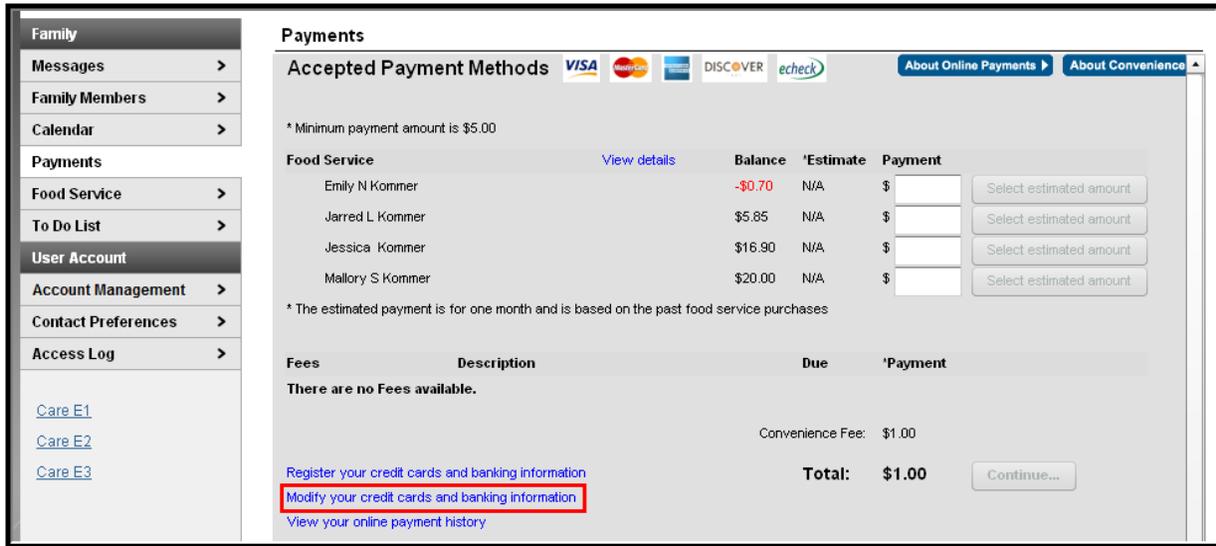
Image 15: Deleting Registered Payment Methods

Once selected, users are directed to a screen displaying all established payment methods. Select the **Cancel** hyperlink for the payment method to be deleted.

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Image 16: Deleting a Registered Payment Method

One selected, users are directed to a confirmation screen. To permanently delete the payment method, select the **Cancel** button. To go back to the previous screen and cancel the payment method deletion, select the **Back** button.

Image 17: Confirmation of Payment Method Deletion

Once the **Cancel** button is selected, a screen will appear confirming the payment method has been successfully deleted.

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Image 18: Confirmation of a Successfully Deleted Payment Method

Viewing Online Payment History

PATH: *Portal > Payments*

Users can view detailed payment history information by selecting the **View Your Online Payment History** hyperlink.
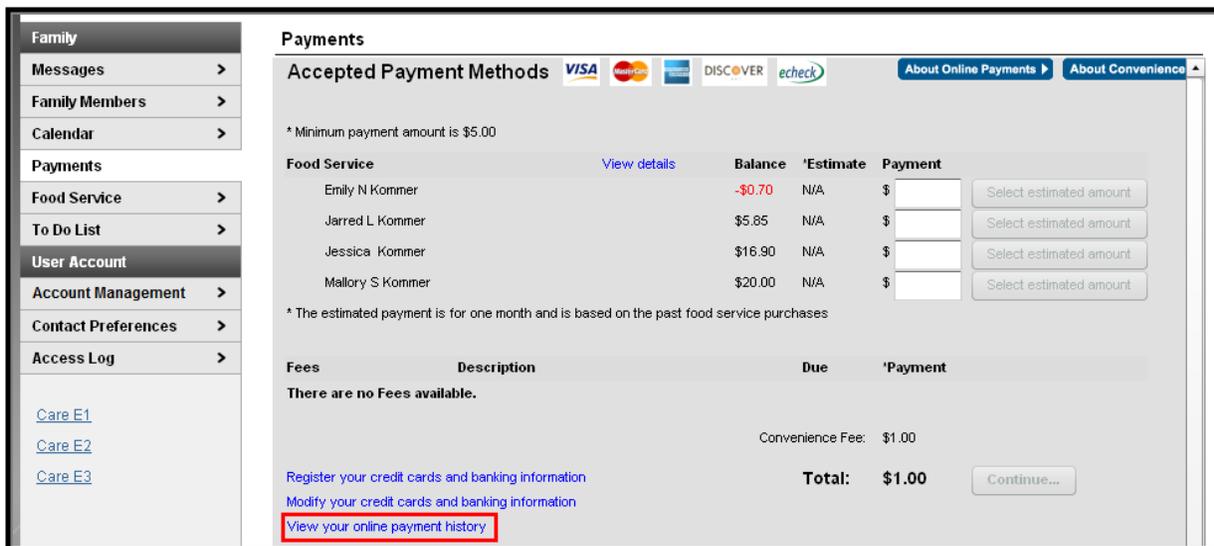
Image 19: Viewing Online Payment History

Once selected, users are directed to a screen detailing payment transactions within the date range entered.

Image 20: Payment History Detail

To generate a printable version of this information, select the **Download PDF for Printing** button. The Online Transaction Report will appear in a separate window in PDF format.

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Image 21: Online Transaction Report

Making an Online Payment

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Making an Online Payment

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> ☑ This document is written for use by parents. Districts can choose to provide this information to their parents or use it as a guide for creating district-owned documentation.

PATH: *Portal > Family > Payments*

The **Payments** tool allows Portal users to make online payments to fees and/or food services incurred by members of a household. If this feature is used by a school, the **Payments** link will appear in the Portal index as shown:
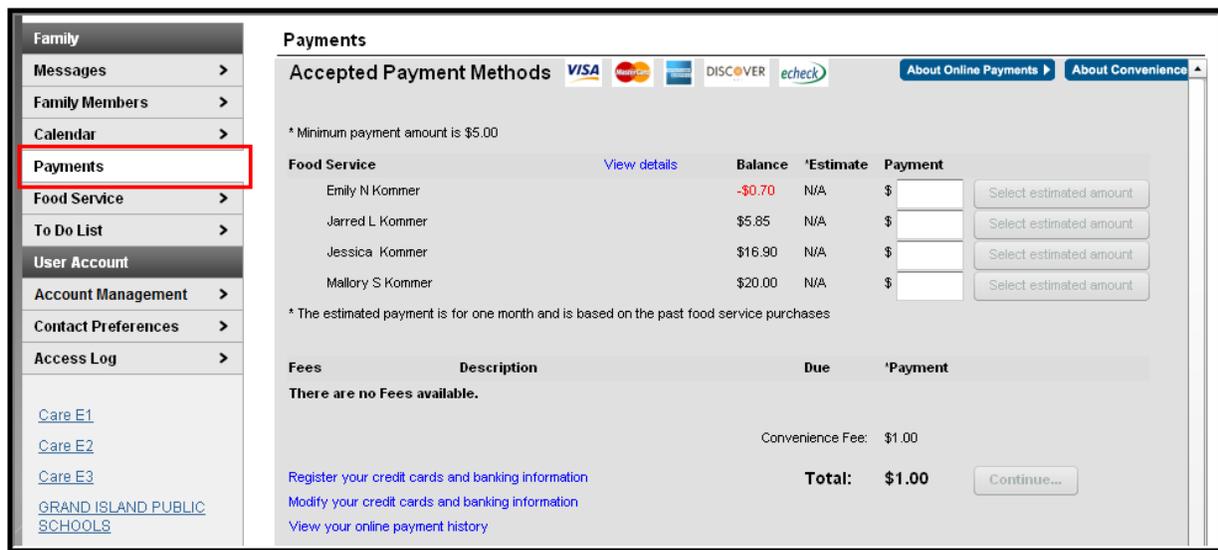
Image 1: Online Payments

> ⚠ The **Payments** link will not appear to all Portal users, as it depends on specific school operations and settings. Similarly, the **Food Service** link, which allows Portal users to view Food Service account activity, will only be available if that feature is also used by the school. When both features are enabled, the Payments tool allows parents to pay incurred fees, deposit money into Food Service accounts, and generate a food service transaction report.

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Entering Fee Payments

> ✅ Unpaid fees from All Years are listed and can be selected for Payment. This does not apply for Food Service payments.

To begin the online payment process for a fee, select **Payments** from the Index. The online payment editor will appear, displaying outstanding fees for all students within the Household.

> ⛔ If the ability to contribute to Food Service accounts is not allowed by the school, the Food Service payment section will not be shown. Similarly, if the students of the household do not have any pending fees, no fees will display in the Fees area.

To view comprehensive detail on a student's fee payment activity, select the **View All Fee Transactions** link. The Fee Statement window will appear, with details on fee transactions.

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Image 2: View All Transactions

The columns on the Fee Statement screen can be defined as follows:

Column	Description

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Due Date	The date on which the fee was due. If a fee has past its due date, but has not yet been paid, the Due Date will appear in red font.
Fee	The name of the fee.
Type	The category to which the fee is assigned (*e.g.*, activity, course).
Debit	The total owed for the fee. The shaded row indicates the total due for the fee.
Credit	The payments that have been made toward the fee. The shaded row indicates the current total of payments made toward the fee. If partial payments have been made, they are listed on the unshaded rows below the fee to which they apply.
Balance	The amount of the fee remaining to be paid.

Fee Payments

Fee payments allow users to pay fees for each student within a household. Users can also view the details of a fee by selecting the plus sign (**+**) next to the fee name. A fee shown in red indicates that a payment for the full amount has not been made before the due date assigned by the school.

> ✅ Before a user can successfully make an online payment, Payment Information must first be registered with the payment vendor. This can be done by selecting the Register your credit cards and banking information.

Once a form of payment has been registered, choose the amount of the fee payment by:

- Entering the the fee payment amount in the **Payment** field, *OR*
- Clicking the **Select Full Amount** button to quickly auto-fill the full fee amount due.

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Image 3: Making a Payment

> ⚠ Payments made through the portal cannot be voided.

If a **Convenience Fee** applies, it will be shown and included in the **Total**. Click **Continue** to proceed to the Payment Method screen:
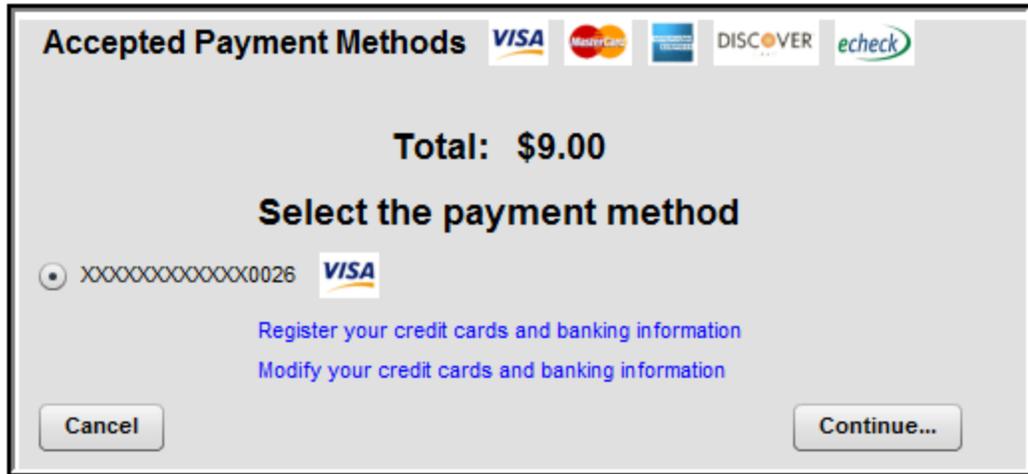
Image 4: Payment Selection

Select the appropriate payment method (previously registered). Click **Continue** to proceed to the fees Confirmation page:
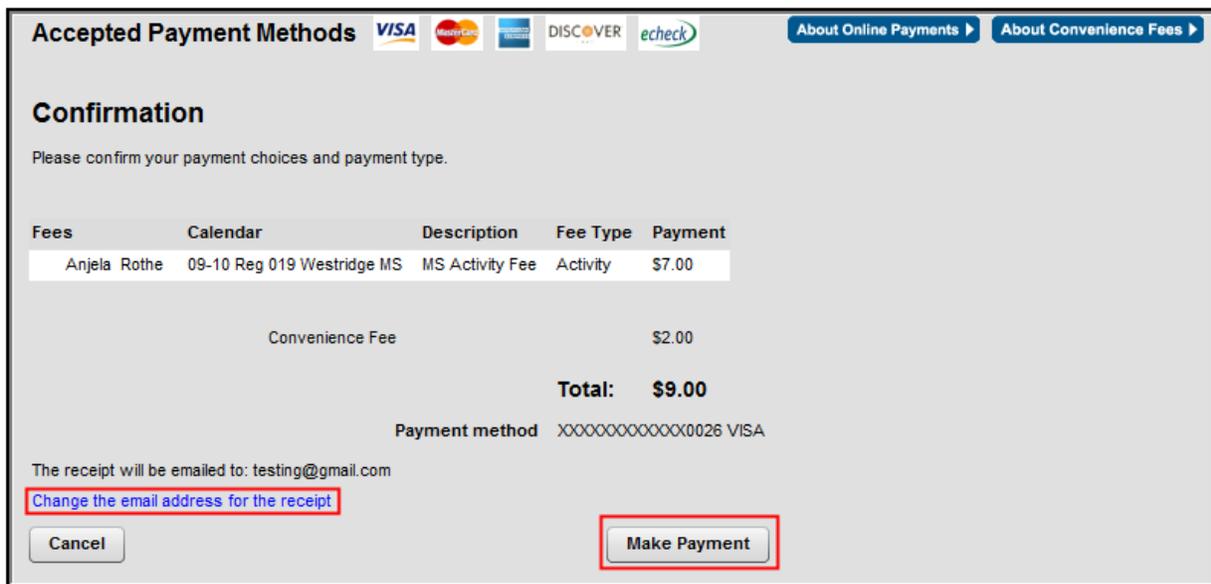
Image 5: Make Payment

Review the payment information. If the district has emailing of payment receipts enabled, the user will be notified on this screen of the email address the receipt will be sent to. To modify this email address, select the **Change the email address for the receipt** hyperlink. An editor will appear, allowing users to insert a new email address.

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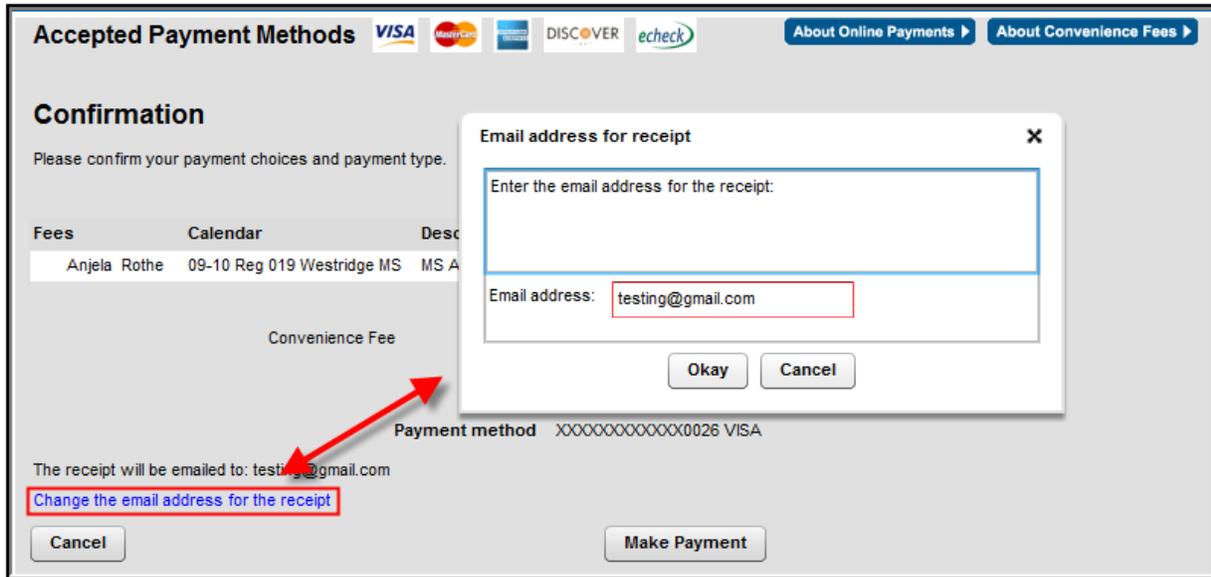
Image 6: Receipt Details

Enter the correct email address within the **Email address** field and select **Okay** when finished. The confirmation screen will now display the correct email address and the payment receipt will be sent accordingly.
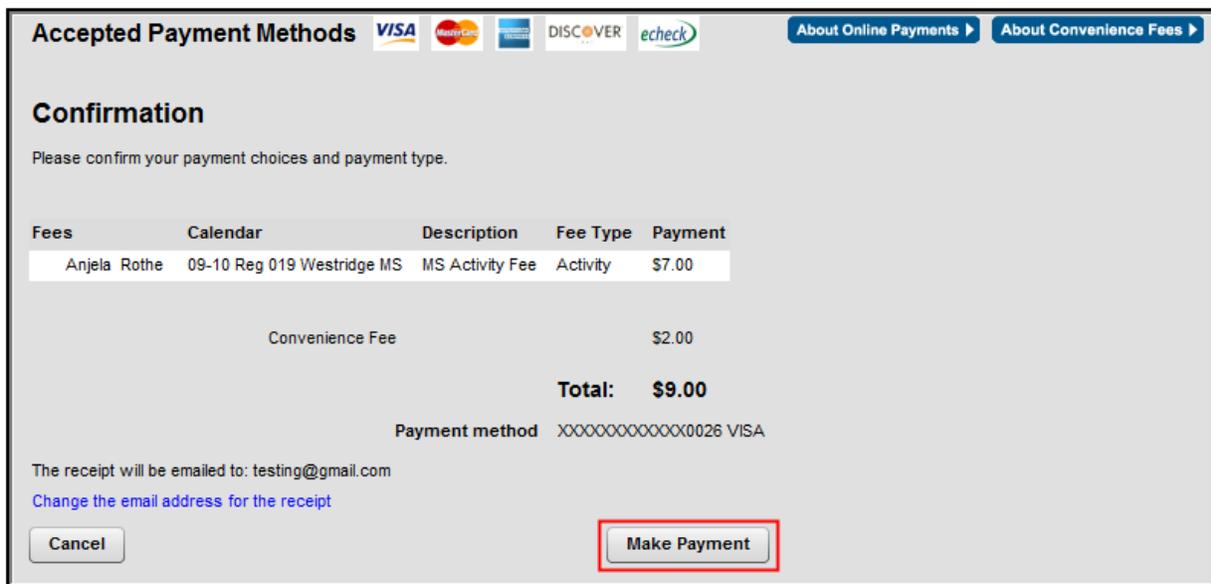
Image 7: Final Payment Review

Review the payment information again to ensure accuracy. To exit without making the transaction, click **Cancel**. Otherwise, click **Make Payments** to process the fees payment. When the transaction has been processed, the Payment Receipt screen will display:

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Image 8: Payment Made

To print a copy of the receipt, click **Print/View** in the lower right-hand side of the screen. To return to the main Payments screen, click **Back To Payments**.

Food Service Transactions

PATH: *Portal > Payments*

The Payments tool allows deposits to be made to Food Service accounts. The Payments screen will display current account balances for each member of a Household.

> ⛔ If the ability to contribute to Food Service accounts is not allowed by the school, the Food Service payment section will not be shown. Similarly, if the students of the household do not have any pending fees, no fees will display in the Fees area.

Depending on the way a school has set up its Food Service accounts, the appearance of the Food Service transactions area will differ.

- **Family Account Setup** - If all Food Service patrons in the household share the same account number, a "Family Account" **Payment** field will appear, as shown:

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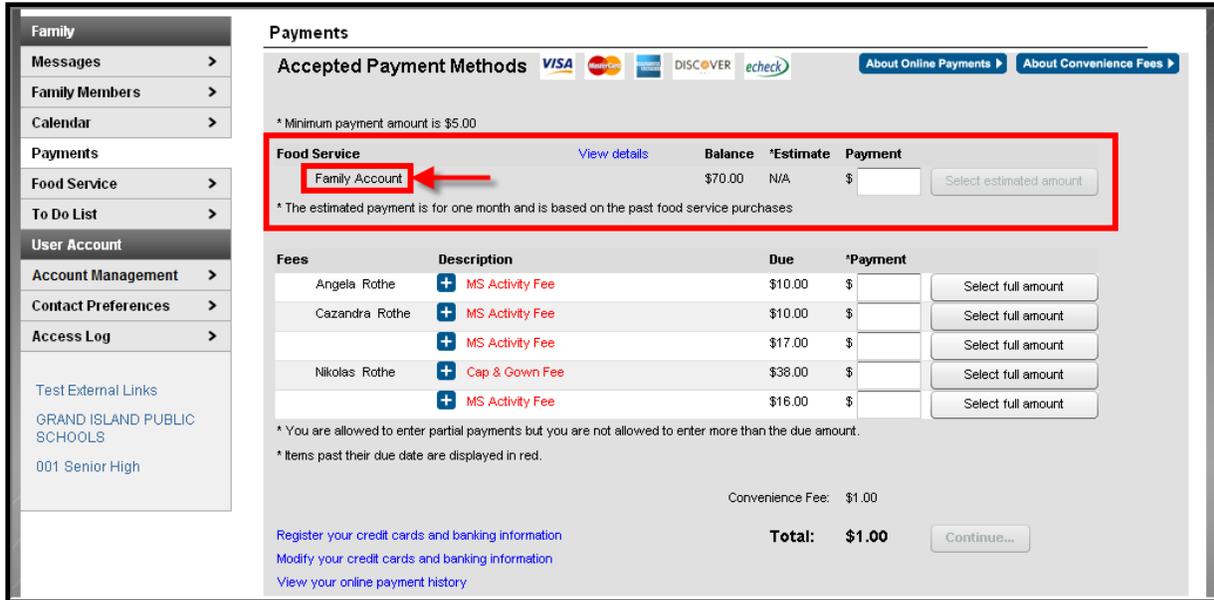
Image 9:Food Service Family Account

Users who see a Family Account shown in this area should jump to the **Family Account Deposits** section of this document.

- **Individual Account Setup** - When individual Food Service accounts exist, the name of each household member will be displayed, and each person will have his/her own **Payment** field, as shown:
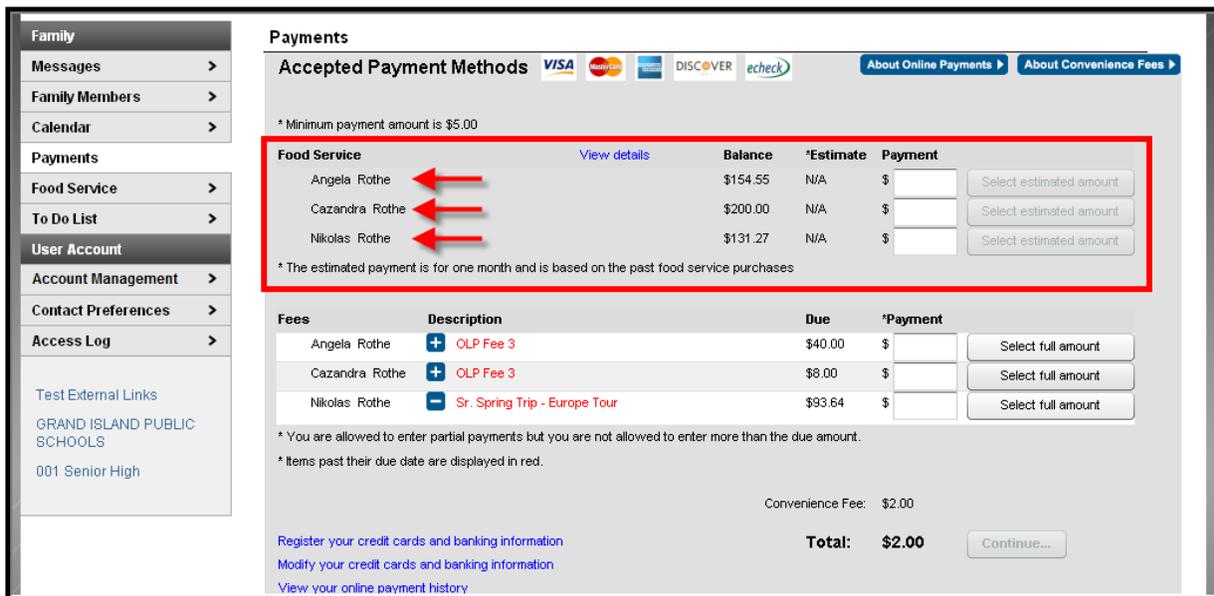
Image 10: Individual Food Service Accounts

Users who see the names of household members with food service accounts should jump to the

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Individual Account Deposits section of this document.

View Details Link

To view the details of the households food service activity, select the **View Details** link. A separate window will appear to display the account activity details, including deposits and meal item purchases.

> ☑ This information is also available through the **Food Service** tool of the Portal Index.

This screen will differ depending on the type of Food Service account setup for the household (*i.e.*, family or individual).

Viewing Family Account Details

When a family account is setup, clicking the **View Details** link will generate the account details as shown:
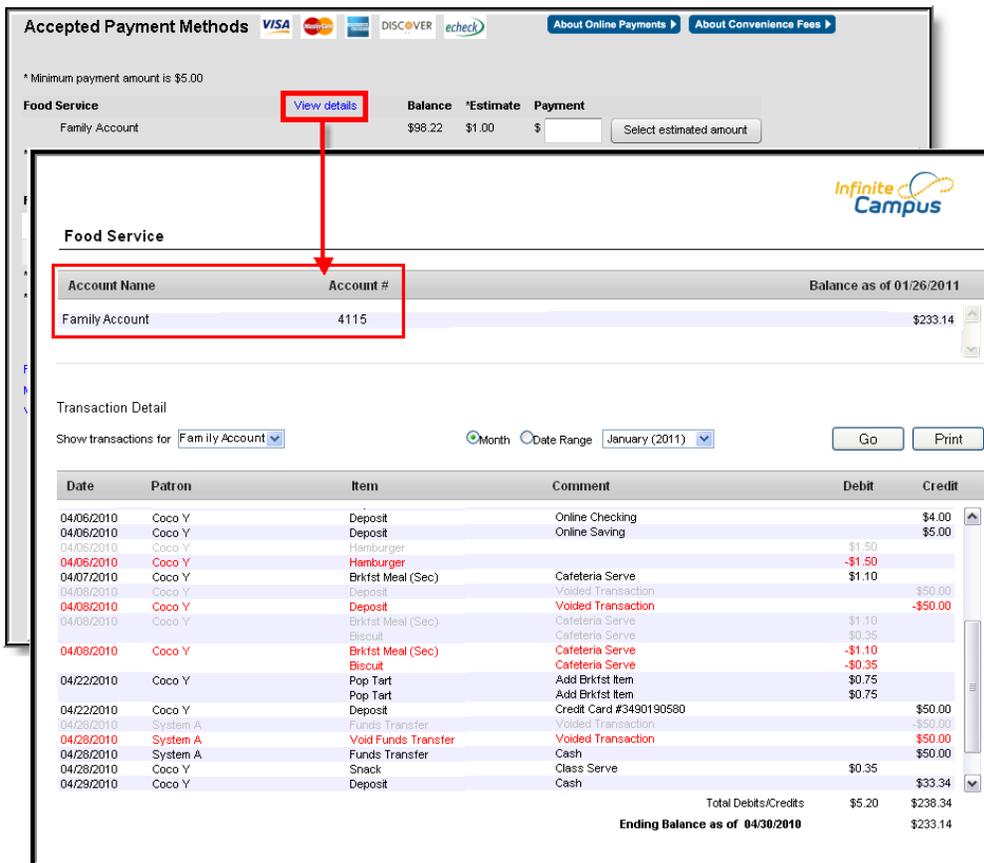
Image 11: Family Account Detail

The **Show Transactions for** field allows Portal users to view the full "Family Account" details, or only view transactions attributed to a specific patron.

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> ⛔ Deposits made to a family account are equally available to all patrons of that account. However, Portal users should be aware that this screen will show deposit transactions as a credit to one patron (not each).

Viewing Individual Account Details

When individual accounts are setup, clicking the **View Details** link will generate the account details as shown:

Image 12: Individual Account Detail

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Analyzing Account Details

The page Food Service (Portal Users) does not exist.

Printing Account Details

To generate a PDF of Food Service account activity, select the **Print** button.

Food Service Account Statement for Coco Young
09-10 · WILLMAR
611 5TH STREET SW, WILLMAR MN 56201-3297

Generated on 05/06/2010 02:59:13 PM

Transaction Summary for Coco Young

Balance as of 04/01/2010	Debit	Credit	Transfer	Deposit	Balance as of 04/30/2010
$0.00	$5.20	$71.00	$50.00	$117.34	$233.14

Transaction Detail for Coco Young

	Transaction Time	Post Time	Patron Name	Category	Item	#	Debit	Credit
1.	04/06/2010 13:04	04/06/2010 13:07	Young , Coco	*Deposit VISA	CC #0026 (Amount: $10.00)			$5.00
	04/06/2010 13:04			Voided Transaction				
2.	04/06/2010 13:10	04/06/2010 13:14	Young , Coco	*Deposit MASTERCARD	CC #1732 (Amount: $4.00)			$2.00
3.	04/06/2010 13:15	04/06/2010 13:19	Young , Coco	*Deposit DISCOVER	CC #0009 (Amount: $3.00)			$3.00
4.	04/06/2010 13:16	04/06/2010 13:20	Young , Coco	*Deposit Online Checking	(Amount: $5.00)			$4.00
5.	04/06/2010 13:17	04/06/2010 13:21	Young , Coco	*Deposit Online Savings	(Amount: $10.00)			$5.00
6.	04/06/2010 00:00	04/06/2010 13:40	Young , Coco	*Deposit cash deposit POSDeposit	Cash (Amount: $40.00)			$20.00
7.	04/06/2010 00:00	04/06/2010 14:19	Young , Coco	*Deposit	Check# 6543 (Amount: $10.00)			$5.00
8.	04/06/2010 00:00	04/06/2010 14:23	Young , Coco	*Deposit In office CC payment	CC #9876 (Amount: $10.00)			$5.00
9.	04/06/2010 15:54	04/06/2010 16:54	Young , Coco	Ala Carte	Hamburger	1	$1.50	
	04/06/2010 16:54			Voided Transaction				
10.	04/06/2010 00:00	04/06/2010 17:29	Young , Coco	Cons Credit Card Payment	0.75 CC # 134	1	$0.75	$10.00
11.	04/06/2010 00:00	04/06/2010 17:29	Young , Coco	Cons Check Payment	0.75 Check # 65542	1	$0.75	$5.00
12.	04/06/2010 00:00	04/06/2010 17:30	Young , Coco	Cons Cash Payment	0.75	1	$0.75	$6.00
13.	04/07/2010 16:53	04/07/2010 16:56	Young , Coco	Breakfast Meal	Brkfst Meal (Sec)	1	$1.10	
14.	04/08/2010 00:00	04/08/2010 12:59	Young , Coco	*Deposit testing	Cash (Amount: $100.00)			$50.00
	04/08/2010 00:00			Voided Transaction				
15.	04/08/2010 14:22	04/08/2010 14:29	Young , Coco	Breakfast Meal Ala Carte	Brkfst Meal (Sec) Biscuit	1 1	$1.10 $0.35	
	04/08/2010 14:22			Voided Transaction				
16.	04/22/2010 10:20	04/27/2010 13:38	Young , Coco	Ala Carte Ala Carte	Pop Tart Pop Tart	1 1	$0.75 $0.75	
17.	04/22/2010 12:20	04/27/2010 16:10	Young , Coco	Deposit Admin Adjust - Deposit	CC # 3490190580			$50.00
18.	04/28/2010 10:50	04/28/2010 10:55	Administrator , System	Transfer to Account#4115 (Peterson, Coco)			$50.00	
	04/28/2010 10:50			Voided Transaction				
19.	04/28/2010 14:43	04/28/2010 14:49	Administrator , System	Transfer from Account#4115 (Peterson, Coco)				$50.00
20.	04/28/2010 17:27	04/28/2010 17:32	Young , Coco	Ala Carte	Snack	1	$0.35	
21.	04/29/2010 00:00	04/29/2010 09:20	Young , Coco	*Deposit	Cash (Amount: $100.00)			$33.34
22.	04/30/2010 00:00	04/30/2010 17:04	Young , Coco	*Deposit	Cash (Amount: $100.00)			$40.00
23.	04/30/2010 00:00	04/30/2010 17:05	Young , Coco	*Deposit	CC #123 (Amount: $50.00)			$30.00
	04/30/2010 00:00			Voided Transaction				
					Total Debits/Credits		$6.20	$238.34

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Account Deposits

> ✅ Before a user can successfully make an online payment, his/her
>
> {*}Payment Information{*}
>
> must first be registered with the payment vendor. This can be done by selecting the
>
> *Register your credit cards and banking information*
>
> link.

Once a form of payment has been registered, choose the amount of the deposit by:

- Entering the deposit amount in the **Payment** field, *OR*
- Clicking the **Select Estimated Amount** button to quickly auto-fill the Payment field.

The **Estimate** total suggests a deposit amount based on a patron's transaction history. After a student has built a history of transactions, an estimated is calculated and displayed in the **Estimate** area. This is a feature designed for convenience.

If a **Convenience Fee** applies, it will be shown and included in the **Total**. Click **Continue** to proceed to the Payment Method screen:

Select the appropriate payment method (previously registered). Click **Continue** to proceed to the deposit Confirmation page:

Review the payment information. If the district has emailing of payment receipts enabled, the user will be notified on this screen of the email address the receipt will be sent to. To modify this email address, select the **Change the email address for the receipt** hyperlink. An editor will appear, allowing users to insert a new email address.

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Enter the correct email address within the **Email address** field and select **Okay** when finished. The confirmation screen will now display the correct email address and the payment receipt will be sent accordingly.

Review the payment information again to ensure accuracy. To exit without making the transaction, click **Cancel**. Otherwise, click **Make Payments** to process the food service deposit. When the transaction has been processed, the Payment Receipt screen will display:

To print a copy of the receipt, click **Print/View** in the lower right-hand side of the screen. To return to the main Payments screen, click **Back To Payments**.

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