

# Parent User How-To

EZSchoolPay

Version 3.4.4





## Step-By-Step Guide: Parent User How-To

*This step-by-step guide gives a brief outline for parent users on how to navigate [www.EZSchoolPay.com](http://www.EZSchoolPay.com). For more detailed descriptions of each step, refer to the page numbers below.*

### Create an Account (Pages 4-7)

1. In order to utilize EZSchoolPay, parents must first register for an account by clicking the “Register” button:
2. Enter an Email Address in the box provided, then click “Continue” – the email address entered will be used when logging in to EZSchoolPay in the future, as well as for validating the new account, password resets and email notifications that may be generated through EZSchoolPay in the future:
3. Enter the required information, such as First Name, Last Name, Address, etc., and then click the magnifying glass to search for your child’s school district. Once you have located your child’s school district, check the box next to the district name, then click “Use Selected District and Close.” Check the box to confirm that you have read and agree to the EZSchoolPay.com Terms of Use, then click “Save”:
4. The final step to complete the registration process is to validate your account. An email from [noreply@ezschoolpay.com](mailto:noreply@ezschoolpay.com) will be sent to the email address you provided with instructions and a link to finish the validation process. If the email is not received within a few minutes, check your Junk or Spam folder. For Gmail accounts, check the “Promotions” folder. Once the account has been validated, your new account is ready for use

### Home Screen (Page 8)

1. When first signing in to EZSchoolPay, the Home screen is displayed:

### Adding a Student (Pages 9-11)

1. From the Home screen of EZSchoolPay, click the “My Students” link on the left side of the page:
2. Click the “Add a Student” button. Click the magnifying glass to search for your child’s school district, then check the box next to the district name. Click the “Use Selected District and Close” button:

### View Balance/Transaction Information (Pages 12-13)

1. Click the “My Students” link on the left side of the page, then click the clipboard icon next to your child’s name:
2. If your children share an account balance for purchases, the “History For” dropdown can be used to filter transactions for the one specific student selected, or to show all transactions for the account. The sort order can also be changed to show “Newest First” or “Oldest First,” if desired:

### Low Balance Email Reminders (Pages 14-15)

1. Click the “My Students” link on the left side of the page, then click the pencil next to your child’s name:

**\*\*Continued on Page 2\*\***





2. On the next screen, enter the “Low Balance Email Reminder Level” (i.e. the dollar amount the account balance should reach before a notification is sent), then check the “Send Reminders” box. Click “Save” when finished – the next time your child’s account balance reaches this dollar amount (or below), an automated email will be sent to your email address to notify you:

### Spending Limits (Pages 16-21)

*NOTE: The spending limit feature may not be available for all school districts. Please contact your child’s school district directly to set spending limits if this feature is not active on EZSchoolPay.com.*

1. To request a spending limit for your child’s meal account, click the “My Students” link on the left side of the page. Then, click the pencil next to your child:
2. On the screen that opens, click the “Set Spending Limits” button, located at the bottom right-hand corner:
3. Select the type of spending limit that should be applied. “Simple” refers to a limit that should be applied to each day, overall, whereas the “Advanced” selection would apply to meal sessions and a la carte purchases individually. When selecting the “Simple” option, continue to step 4; otherwise, proceed to step 5:
4. When setting the spending limit to apply to each day, overall, select the appropriate Spending Limit choice from the options listed.
5. When setting the spending limit to apply to breakfast, lunch and a la carte purchases separately, select the “Advanced” option, then make the appropriate selections for each session (Breakfast and Lunch), as well as how their a la carte purchases should be limited, accordingly.
6. Once all appropriate selections have been made, click the “Save” button. A confirmation will appear, indicating the type of limit(s) being set for your child’s meal account. If this is correct, click “Continue”; otherwise, click “Cancel” and make the appropriate selections:
7. Once the “Continue” button is clicked, this will send a message to your child’s school district to approve the request (if the district requires these requests to be approved). Once approved, the limit selections made will be applied, moving forward, for any purchases made.

### Billing Setup (Pages 22-23)

1. To add a payment method to the account, click “Billing Setup” on the left side of the page, then click the “Add Credit Card” button
2. On the screen that opens, enter a description for the payment method, as well as the details for the payment method, in the fields provided. If there is more than one payment method set up, one card needs to be marked as primary. Once the details for the payment method have been entered, click the “Save” button

### Recurring Payments (Pages 24-26)

1. To setup a recurring payment click the “Recurring Payment” link on the left side of the page, then click the “Add Recurring Payment” button
2. Select the recurring payment type of Frequency or Low Balance, then enter in the information for the recurring payment. Select the option for the duration that the recurring payment should remain in effect. Choose the patron(s) to apply these payments to and enter in the amount. Once all selections have been made, click the “Continue” button. Confirm that the recurring payment details are accurate. If so, click the “Confirm” button to

**\*\*Continued on Page 3\*\***







complete the setup. If the information is incorrect, click the “Back” button to make the appropriate changes

## Credit History *(Page 27)*

1. To view the credit (payment) history that has been applied to the account, click the “Credit History” link on the left side of the page. Enter in the Range that should be displayed. To search for an individual credit enter in the Credit ID, then click the “Search” button

## Store / Pay Online *(Page 28)*

1. Click the “Store / Pay Online” link on the left side of the page. If there are any pending purchases that have not been submitted, they will display in the “Pending” column. Enter the amount to be applied for the purchase, then click the “Add to Cart” button

## Shopping Cart *(Pages 29-30)*

1. To review the shopping cart, click the “Cart” link on the left side of the page. Review any pending transactions to confirm accuracy. To finalize the transaction(s), click the “Proceed to Checkout” button. The Cart can be emptied by clicking the “Clear Cart” button, if needed. To add additional items for purchase, click the “Continue Shopping” button
2. Once the user clicks the “Proceed to Checkout” button in step 1, the screen that opens will prompt for payment information to finalize the transaction. Review the items in the cart to confirm accuracy, then enter (or select) the appropriate method of payment to be used. Once the items in the cart are confirmed, and a method of payment is entered/selected, to finalize the transaction, click the “Submit Order” button

## Help *(Pages 31-32)*

1. Click the “Help” link on the left side of the page. Select the nature of your issue from the links provided
2. Depending on the nature of the issue selected, additional options will be displayed. Click the link that most accurately resembles the issue. Once selected, additional steps and/or clarification is displayed. If the issue requires assistance from either EZSchoolPay Support or district staff, the applicable contact information will be provided. At any point, clicking the “Start Over” option will allow the user to make a different selection, as needed

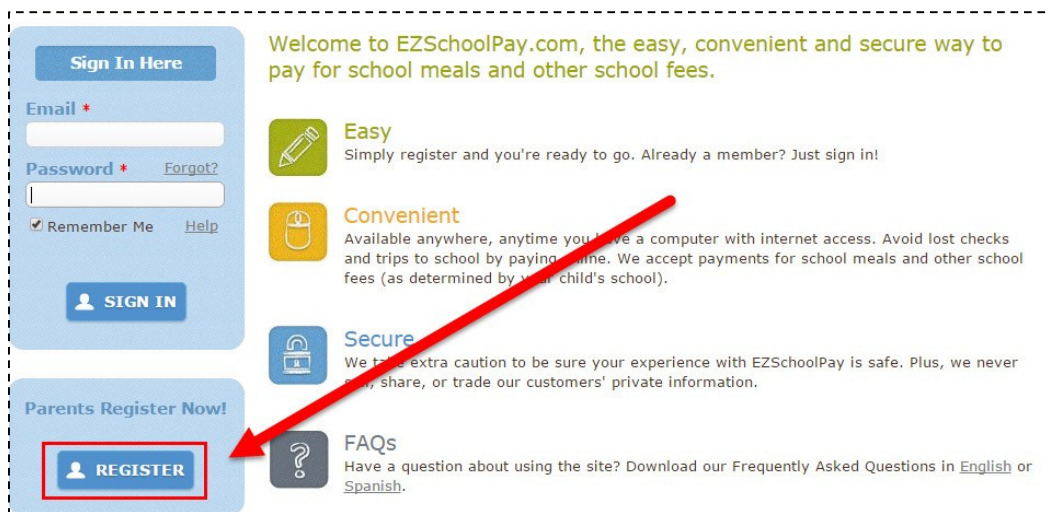




This document outlines basic usage of the [www.EZSchoolPay.com](http://www.EZSchoolPay.com) website. Instructions contained in this document are specific to parent users of EZSchoolPay who are linked to a child that is enrolled at the school district. Note that any confidential and/or secure data has been redacted for privacy throughout this document.

## Create an Account

1. In order to utilize EZSchoolPay, parents must first register for an account by clicking the “Register” button:



**Sign In Here**

Email \*

Password \* [Forgot?](#)

☒ Remember Me [Help](#)

**SIGN IN**

**Parents Register Now!**

**REGISTER**

Welcome to EZSchoolPay.com, the easy, convenient and secure way to pay for school meals and other school fees.

**Easy**  
Simply register and you're ready to go. Already a member? Just sign in!

**Convenient**  
Available anywhere, anytime you have a computer with internet access. Avoid lost checks and trips to school by paying online. We accept payments for school meals and other school fees (as determined by your child's school).

**Secure**  
We take extra caution to be sure your experience with EZSchoolPay is safe. Plus, we never sell, share, or trade our customers' private information.

**FAQs**  
Have a question about using the site? Download our Frequently Asked Questions in [English](#) or [Spanish](#).





2. Enter an Email Address in the box provided, then click "Continue" – the email address entered will be used when logging in to EZSchoolPay in the future, as well as for validating the new account, password resets and email notifications that may be generated through EZSchoolPay in the future:

Sign In Here

Email \*

Password \* [Forgot?](#)

☒ Remember Me [Help](#)

SIGN IN

## Parent Registration

By using this form, you can sign up as a parent on EZSchoolPay.com. An email with instructions for validating your account will be sent to the address you provide. Please check everything you enter to be sure it's correct before you click "save" to create your account.

Email Address\*

parent@email.com

CONTINUE

←

Connect with us: (855) 278-8277

[support@ezschoolpay.com](mailto:support@ezschoolpay.com)



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Version 3.4.4

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3. Enter the required information, such as First Name, Last Name, Address, etc., and then click the magnifying glass to search for your child's school district. Once you have located your child's school district, check the box next to the district name, then click "Use Selected District and Close." Check the box to confirm that you have read and agree to the EZSchoolPay.com Terms of Use, then click "Save":

## Parent Registration

Email Address  
johndoe@email.com

First Name\*  
John

Last Name\*  
Doe

Address\*  
123 Fake Street

City\*  
Dallas

State\*  
Texas (TX)

Zip Code\*  
76224

Phone Number\*  
(214) 320-1111

Security Question\*  
Mother's Maiden Name

Security Answer\*  
mommaiden

Password\*  
.....


Confirm Password\*  
.....

School District\*  
Francis Howell School District

Time Zone (if known)  
Central Time (US/Canada)

☒ I have read and agree to the EZSchoolPay.com Terms of Use.\* [\[Show\]](#)

X CANCEL

 SAVE





4. The final step to complete the registration process is to validate your account. An email from [noreply@ezschoolpay.com](mailto:noreply@ezschoolpay.com) will be sent to the email address you provided with instructions and a link to finish the validation process. If the email is not received within a few minutes, check your Junk or Spam folder. For Gmail accounts, check the "Promotions" folder. Once the account has been validated, your new account is ready for use



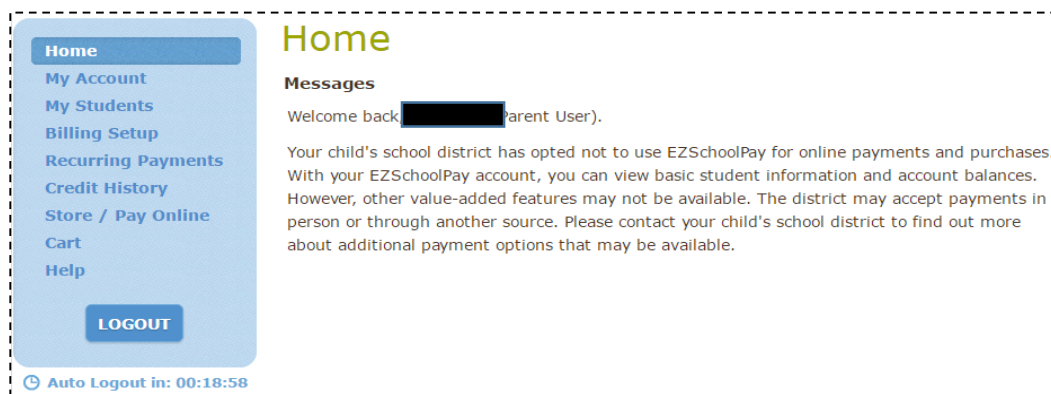




## Home Screen

When a user logs in to EZSchoolPay, the Home screen is displayed. Links to the various sections of EZSchoolPay are available, as well as any important messages that should be reviewed.

1. When first signing in to EZSchoolPay, the Home screen is displayed:



There are nine links on the left-hand side to get started:

- **Home:** This link will return to the Home screen at any time
- **My Account:** This link allows account information to be updated, such as Name and Address, or to update account security settings
- **My Students:** This link will display any students that are linked to your account, where additional students can be added, transactions can be viewed for any students that are linked, spending limits can be set, or update low balance email reminder settings, if applicable
- **Billing Setup:** This link allows the parent or user to store a payment method (credit/debit card) for use when making purchases through EZSchoolPay
- **Recurring Payments:** This link is used to set up or view recurring (automatic) payments
- **Credit History:** This link shows a history of the credits (payments) applied to the child's account
- **Store / Pay Online:** This link allows the parent or user to apply credits to their child's account online, or make purchases for other store items, as applicable
- **Cart:** This link allows the parent or user to review the items that have been selected for purchase, and to select the payment method to complete the transaction
- **Help:** This link provides answers to frequently-asked questions and allows the user to submit questions to EZSchoolPay Support, or to school district contacts, when navigating the EZSchoolPay website

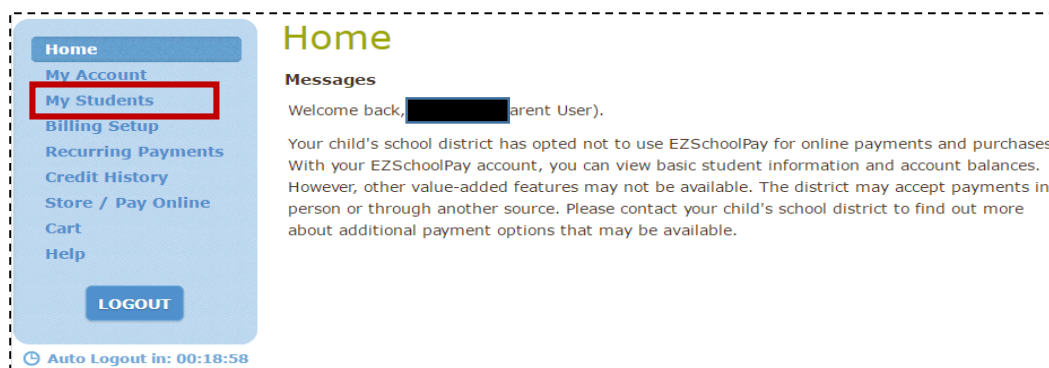




## Adding a Student

Before transaction history can be viewed, or low-balance email reminders set, a student must be linked to your account.

1. From the Home screen of EZSchoolPay, click the “My Students” link on the left side of the page:





- Click the “Add a Student” button. Click the magnifying glass and use the fields provided to search for your child’s school district, then check the box next to the district name. Click the “Use Selected District and Close” button:

### Select Districts

Please enter at least one value and then click "Search". Partial names are allowed.

District Name

City

State

Zip Code

harris

✕ CLOSE

🔍 SEARCH

	District	Customer	Code	City	St	Zip
<input checked="" type="checkbox"/>	Harris School Solutions SM	Harris School Solutions	5906617	Rocklin	CA	95677
<input type="checkbox"/>	Harris Support Test Orion V	Harris School Solutions	9993607	Rocklin	CA	95682
<input type="checkbox"/>	South Harrison Community School	South Harrison Community School Corp.	7866553	Corydon	IN	47112

📄

USE SELECTED DISTRICT AND CLOSE







3. Enter your child's Last Name, as well as their Student Number, then click "Save" – if an exact match for the last name and student number provided exists within the selected district, that child will be linked to your account on EZSchoolPay. If you do not know your child's Student Number, contact your child's school for further assistance:

[Home](#)

[My Account](#)

**[My Students](#)**

[Billing Setup](#)

[Recurring Payments](#)

[Credit History](#)

[Store / Pay Online](#)

[Cart](#)

[Help](#)

**LOGOUT**

⌚ Auto Logout in: 00:17:13

## My Students

### Add a Student

District\*

☒ By Student Number   
 ☐ By Birth Date

Last Name\*

Student Number\*

To help ensure the privacy of your student, you must know and enter the student's last name and number. If you have trouble adding your student or don't know the student's number, you can obtain or verify this information by contacting the student's school.

✕ CANCEL
💾 SAVE

*NOTE: Other linking options, such as by name and birthdate, are available, however, these options are only displayed if the selected district has enabled this feature*





## View Balance/Transaction Information

Once linked to a student, transactions entered during meal service, as well as current account balances, are visible on EZSchoolPay. Transaction history is typically updated once per day (usually in the afternoon/early evening), and will store up to 30 days of history, while the current balance of your child's account is updated typically every 10-15 minutes. **NOTE:** Transaction history displayed on EZSchoolPay is only visible from the time you link to your student moving forward. Transactions prior to the date you linked to your student is not displayed.

To View Transaction History:

1. Click the "My Students" link on the left side of the page, then click the clipboard icon next to your child's name:

[Home](#)  
[My Account](#)  
[My Students](#)  
[Billing Setup](#)  
[Recurring Payments](#)  
[Credit History](#)  
[Store / Pay Online](#)  
[Cart](#)  
[Help](#)  
  
[LOGOUT](#)

## My Students

	Last Name	First Name	School	Balance	Fees
✕ 📋 ✎				\$6.20	N/A

Click the pencil beside your student's name to: View additional student information and pending balances.

[CONTACT SCHOOL](#)
[+ ADD A STUDENT](#)

Auto Logout in: 00:19:40





2. If your children share an account balance for purchases, the “History For” dropdown can be used to filter transactions for the one specific student selected, or to show all transactions for the account. The sort order can also be changed to show “Newest First” or “Oldest First,” if desired:

← BACK

ABOUT TRANSACTION HISTORY

→ RUN REPORT

Served	Processed	Description	Sale	Cash	Credit	Debit	Balance
09/22/2015 Tuesday	09/22/2015 12:12:43 PM	Lunch Service 1 LUNCH MEAL @ 2.25	\$2.25			\$2.25	\$0.65



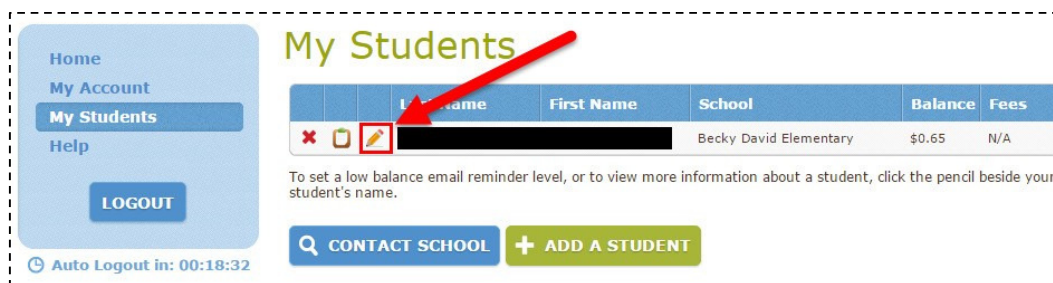




## Low Balance Email Reminders


When desired, users can receive an email notification from EZSchoolPay when their child's account balance reaches a set dollar amount, defined by the user.

1. Click the "My Students" link on the left side of the page, then click the pencil next to your child's name:



[Home](#)  
[My Account](#)  
[My Students](#)  
[Help](#)  
[LOGOUT](#)  
 Auto Logout in: 00:18:32

### My Students

	Last Name	First Name	School	Balance	Fees
✕ 	[REDACTED]	[REDACTED]	Becky David Elementary	\$0.65	N/A

To set a low balance email reminder level, or to view more information about a student, click the pencil beside your student's name.

[CONTACT SCHOOL](#)
[+ ADD A STUDENT](#)





2. On the next screen, enter the “Low Balance Email Reminder Level” (i.e. the dollar amount the account balance should reach before a notification is sent), then check the “Send Reminders” box. Click “Save” when finished – the next time your child’s account balance reaches this dollar amount (or below), an automated email will be sent to your email address to notify you:

Home

My Account


**My Students**

Help

**LOGOUT**

⌚ Auto Logout in: 00:18:39

## My Students



First Name

Last Name

Student Number

Student PIN

School / District

Provider

Birth Date

Low Balance Email Reminder Level

☒ Send Reminders

☒ Active?

Balances			
Balance Type	Bal	Pend	Share
Lunch	\$0.65	\$0.00	No

**CANCEL**

**SAVE**

**VIEW TRANSACTIONS**

Current as of 9/23/2015 11:18 AM

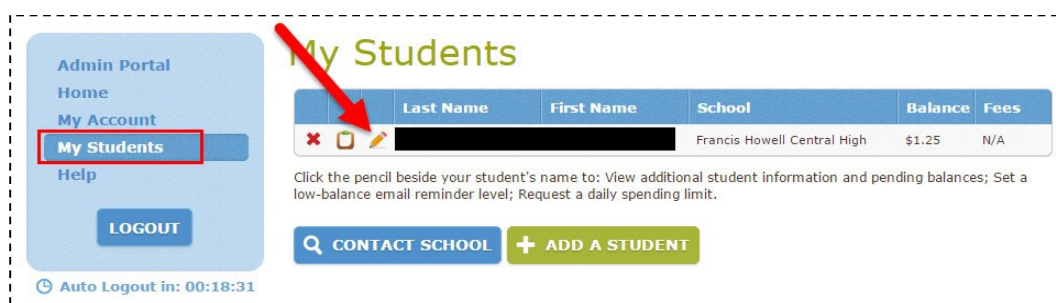




## Spending Limits

When enabled, EZSchoolPay offers the ability to request that spending limits (restrictions) are put on to your child's meal account. The spending limit can be applied to each day, overall, individual meal sessions (Breakfast or Lunch), or for a la carte purchases, if desired. *NOTE: The spending limit feature may not be available for all school districts. Please contact your child's school district directly to set spending limits if this feature is not active on EZSchoolPay.com.*

1. To request a spending limit for your child's meal account, click the "My Students" link on the left side of the page. Then, click the pencil next to your child:



[Admin Portal](#)  
[Home](#)  
[My Account](#)  
[My Students](#)  
[Help](#)  
[LOGOUT](#)  
 Auto Logout in: 00:18:31

### My Students

	Last Name	First Name	School	Balance	Fees
✕			Francis Howell Central High	\$1.25	N/A

Click the pencil beside your student's name to: View additional student information and pending balances; Set a low-balance email reminder level; Request a daily spending limit.

[CONTACT SCHOOL](#)
[ADD A STUDENT](#)








2. On the screen that opens, click the “Set Spending Limits” button, located at the bottom right-hand corner:

Admin Portal  
Home  
My Account  
**My Students**  
Help  
  
LOGOUT  
  
Auto Logout in: 00:19:29

## My Students



First Name  
Last Name  
Student Number  
Student PIN  
School / District  
Francis Howell Central High / Francis Howell School District  
Provider  
eTriton 7  
Birth Date

Balance Type	Bal	Pend	Share
Lunch	\$1.25	\$0.00	No

Low Balance Email Reminder Level  
-999.99 ☐ Send Reminders  
Current as of 2/26/2016 3:33 PM ☒ Active?

CANCEL SAVE VIEW TRANSACTIONS **SET SPENDING LIMITS**





3. Select the type of spending limit that should be applied. “Simple” refers to a limit that should be applied to each day, overall, whereas the “Advanced” selection would apply to meal sessions and a la carte purchases individually. When selecting the “Simple” option, continue to step 4; otherwise, proceed to step 5:

**Admin Portal**

Home

My Account

**My Students**

Help

**LOGOUT**

⌚ Auto Logout in: 00:16:13

## My Students

### Set Spending Limits for [REDACTED]

Note: This form will allow you to submit spending limit changes for the selected student to your school's Food Service Department. This will usually take effect within several minutes. EZSchoolPay does not make any decisions involving student spending. Please contact your school directly for any inquiries regarding spending limits.

Please choose one:

☒ Simple: Set an all-day spending limit for this student.

☐ Advanced: Limits should affect breakfast, lunch, and ala carte separately.

Spending Limit

☐ Do not limit meal account spending (max allowed).

☐ Do not allow any meal account spending (\$0.00 allowed).  
*When this option is selected, the student must pay with cash (or check) during meal service.*

☒ Limit meal account spending per day to a specific dollar amount.

Daily Spending Limit:

**✕ CANCEL**

**💾 SAVE**





4. When setting the spending limit to apply to each day, overall, select the appropriate Spending Limit choice from the options listed. See below for a more detailed explanation of each option:

Admin Portal  
Home  
My Account  
**My Students**  
Help  
  
LOGOUT  
  
Auto Logout in: 00:16:13

## My Students

### Set Spending Limits for [REDACTED]

Note: This form will allow you to submit spending limit changes for the selected student to your school's Food Service Department. This will usually take effect within several minutes. EZSchoolPay does not make any decisions involving student spending. Please contact your school directly for any inquiries regarding spending limits.

Please choose one:

- ☒ Simple: Set an all-day spending limit for this student.
- ☐ Advanced: Limits should affect breakfast, lunch, and ala carte separately.

**Spending Limit**

- ☐ Do not limit meal account spending (max allowed).
- ☐ Do not allow any meal account spending (\$0.00 allowed).  
*When this option is selected, the student must pay with cash (or check) during meal service.*
- ☒ Limit meal account spending per day to a specific dollar amount.

Daily Spending Limit:

CANCEL
SAVE

- **Do not limit meal account spending (max allowed):** When this option is selected, your child will be able to use their meal account, without a limit applied
- **Do not allow any meal account spending (\$0.00 allowed):** When this option is selected, your child will not be able to use their meal account for any purchases, and must pay with cash (or check) during meal service; purchases made cannot be deducted from your child's meal account
- **Limit meal account spending per day to a specific dollar amount:** When this option is selected, your child will only be able to spend the set dollar amount from their account for each day. This applies to all meal sessions, as well as a la carte purchases







5. When setting the spending limit to apply to breakfast, lunch and a la carte purchases separately, select the “Advanced” option, then make the appropriate selections for each session (Breakfast and Lunch), as well as how their a la carte purchases should be limited, accordingly. See below for a more detailed explanation of each option:

**Admin Portal**

[Home](#)

[My Account](#)

**[My Students](#)**

[Help](#)

**LOGOUT**

Auto Logout in: 00:19:44

## My Students

### Set Spending Limits for [REDACTED]

Note: This form will allow you to submit spending limit changes for the selected student to your school's Food Service Department. This will usually take effect within several minutes. EZSchoolPay does not make any decisions involving student spending. Please contact your school directly for any inquiries regarding spending limits.

Please choose one:

☐ Simple: Set an all-day spending limit for this student.

☒ **Advanced: Limits should affect breakfast, lunch, and ala carte separately.**

**Breakfast Limit**

☒ Do not limit meal account spending during breakfast (max allowed).

☐ Do not allow any meal account spending during breakfast (\$0.00 allowed).  
*When this option is selected, the student must pay with cash (or check) during breakfast.*

☐ Limit meal account spending per day, during breakfast, to a specific dollar amount.

**Lunch Limit**

☒ Do not limit meal account spending during lunch (max allowed).

☐ Do not allow any meal account spending during lunch (\$0.00 allowed).  
*When this option is selected, the student must pay with cash (or check) during lunch.*

☐ Limit meal account spending per day, during lunch, to a specific dollar amount.

**AlaCarte Items**

☐ Do not allow any account purchases for ala carte items during breakfast.  
*When this option is selected, the student must pay with cash (or check) when making ala carte purchases during breakfast.*

☐ Do not allow any account purchases for ala carte items during lunch.  
*When this option is selected, the student must pay with cash (or check) when making ala carte purchases during lunch.*

X CANCEL
SAVE

#### Breakfast

- **Do not limit meal account spending (max allowed):** When this option is selected, your child will be able to use their meal account, without a limit applied
- **Do not allow any meal account spending (\$0.00 allowed):** When this option is selected, your child will not be able to use their meal account for any purchases, and must pay with cash (or check) during meal service; breakfast meal purchases cannot be deducted from their meal account
- **Limit meal account spending per day to a specific dollar amount:** When this option is selected, your child will only be able to spend the set dollar amount from their account for each day. This applies to all meal sessions, as well as a la carte purchases





### Lunch

- **Do not limit meal account spending (max allowed):** When this option is selected, your child will be able to use their meal account, without a limit applied
- **Do not allow any meal account spending (\$0.00 allowed):** When this option is selected, your child will not be able to use their meal account for any purchases, and must pay with cash (or check) during meal service; lunch meal purchases cannot be deducted from their meal account
- **Limit meal account spending per day to a specific dollar amount:** When this option is selected, your child will only be able to spend the set dollar amount from their account for each day. This applies to all meal sessions, as well as a la carte purchases

### Ala Carte Items

- **Do not allow any account purchases for ala carte items during breakfast:** When this option is selected, your child must pay with cash (or check) for any a la carte items that are purchased during the breakfast session; these purchases cannot be deducted from their meal account
  - **Do not allow any account purchases for ala carte items during lunch:** When this option is selected, your child must pay with cash (or check) for any a la carte items that are purchased during the breakfast session; these purchases cannot be deducted from their meal account
6. Once all appropriate selections have been made, click the “Save” button. A confirmation will appear, indicating the type of limit(s) being set for your child’s meal account. If this is correct, click “Continue”; otherwise, click “Cancel” and make the appropriate selections:

**Confirm Your Request**

You are about to request the following spending limits:

- Student spending won't be restricted.

Continue only if this is correct.

✕ CANCEL
📄 CONTINUE

7. Once the “Continue” button is clicked, this will send a message to your child’s school district to approve the request (if the district requires these requests to be approved). Once approved, the limit selections made will be applied, moving forward, for any purchases made.

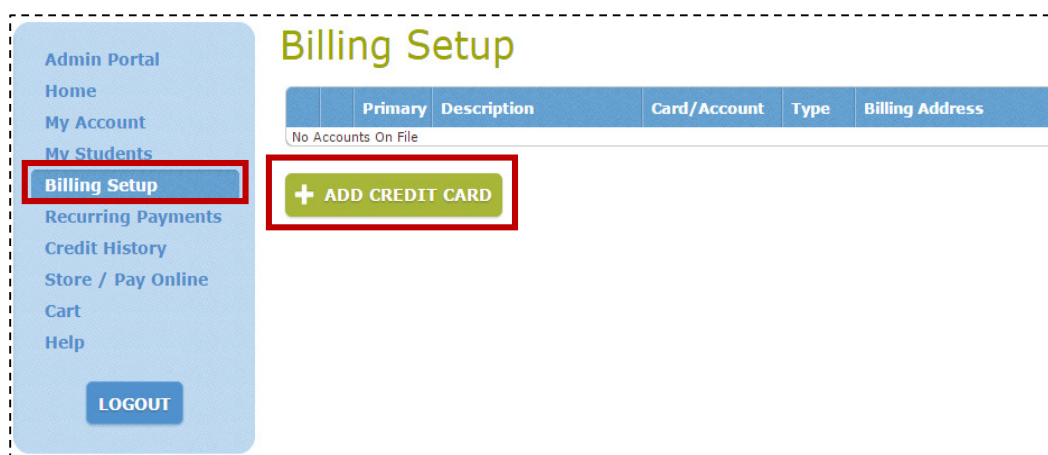




## Billing Setup

The Billing Setup screen allows the parent or user to store a payment method (credit/debit card), as well as the billing details, such as billing address, for use when making purchases through EZSchoolPay. This payment can be used for one-time purchases, or for recurring (automatic) payments, as appropriate.

1. To add a payment method to the account, click “Billing Setup” on the left side of the page, then click the “Add Credit Card” button:



Admin Portal  
Home  
My Account  
My Students  
**Billing Setup**  
Recurring Payments  
Credit History  
Store / Pay Online  
Cart  
Help  
  
LOGOUT

## Billing Setup

Primary	Description	Card/Account	Type	Billing Address
No Accounts On File				

+ ADD CREDIT CARD







2. On the screen that opens, enter a description for the payment method, as well as the details for the payment method, in the fields provided. If there is more than one payment method set up, one card needs to be marked as primary. Once the details for the payment method have been entered, click the “Save” button:

## Billing Setup

### New Card

Description\*

☐ Primary

Billing Address\*

Current Address

Name On Card\*

Payment Type\*

Visa

Card Number\*

CVV\*

Expiration Month/Year\*





## Recurring Payments

Recurring (automatic) Payments can be set up to automatically apply funds to the student(s) account, for use during meal service. The recurring payment can be set up with either a set amount and frequency (i.e. \$20 every Monday), or to only occur when the student's balance is below a set amount (i.e. \$20 when student's balance is below \$5.00).

1. To setup a recurring payment click the "Recurring Payment" link on the left side of the page, then click the "Add Recurring Payment" button:

Admin Portal  
Home  
My Account  
My Students  
Billing Setup  
**Recurring Payments**  
Credit History  
Store / Pay Online  
Cart  
Help  
  
LOGOUT

## Recurring Payments

Type	Payment Account	Start Date	End Date	Enabled
No Recurring Payments				

+ ADD RECURRING PAYMENT

☒ Show Disabled  
To disable an active recurring payment, click the pencil next to the one desired, uncheck the 'Enabled' box, continue and confirm.





2. Select the recurring payment type of Frequency or Low Balance, then enter in the information for the recurring payment. Select the option for the duration that the recurring payment should remain in effect. Choose the patron(s) to apply these payments to and enter in the amount. Once all selections have been made, click the "Continue" button:

## Recurring Payments

**Type** ☒ Frequency ☐ Low Balance ☒ Enabled

**Frequency** ?

**Payment Account**

**Start Date**  
 📅

☒ Continue until I change or cancel this payment

☐ Continue until but not after:  📅

Apply	Student	Amount
<input type="checkbox"/>	Michael Osborne	\$0.00

← BACK
→ CONTINUE







3. Confirm that the recurring payment details are accurate. If so, click the “Confirm” button to complete the setup. If the information is incorrect, click the “Back” button to make the appropriate changes:

## Recurring Payments

You have selected the following options:

- A recurring payment of \$0.01 will be made for Michael Osborne weekly.

← BACK

→ CONFIRM





## Credit History

The Credit History section displays a history of the credits (payments) applied to the account, either for a specific date range, or by specific Credit ID. Options for “Unposted Only” and “Include Declined” are available, as needed, to filter transactions that have not been applied to the student’s account, or to filter for any transactions that were not authorized.

1. To view the credit (payment) history that has been applied to the account, click the “Credit History” link on the left side of the page. Enter in the Range that should be displayed. To search for an individual credit enter in the Credit ID, then click the “Search” button:

[Admin Portal](#)  
[Home](#)  
[My Account](#)  
[My Students](#)  
[Billing Setup](#)  
[Recurring Payments](#)  
[Credit History](#)  
[Store / Pay Online](#)  
[Cart](#)  
[Help](#)  
[LOGOUT](#)

### Credit History

Range\*
Credit ID

2 months
☒ Unposted Only
☒ Include Declined

Credit ID	Credit Time	Amount	Fee	Status
None Available				






## Store / Pay Online

The Store/Pay Online screen allows the user to apply credits to their student's account online, or make purchases for other store items, as appropriate.

1. Click the "Store / Pay Online" link on the left side of the page. If there are any pending purchases that have not been submitted, they will display in the "Pending" column. Enter the amount to be applied for the purchase, then click the "Add to Cart" button:


[Admin Portal](#)  
[Home](#)  
[My Account](#)  
[My Students](#)  
[Billing Setup](#)  
[Recurring Payments](#)  
[Credit History](#)  
[Store / Pay Online](#)  
[Cart](#)  
[Help](#)  
  
[LOGOUT](#)

## Store / Pay Online



**Lunch Credit**  
Item Code: 2  
Make a payment for students in eTrition 7.

Student	School	Balance	Pending	Amount
Michael Osborne	Conway High School West	\$9.80	\$0.00	0.00

✕ CANCEL
 ADD TO CART



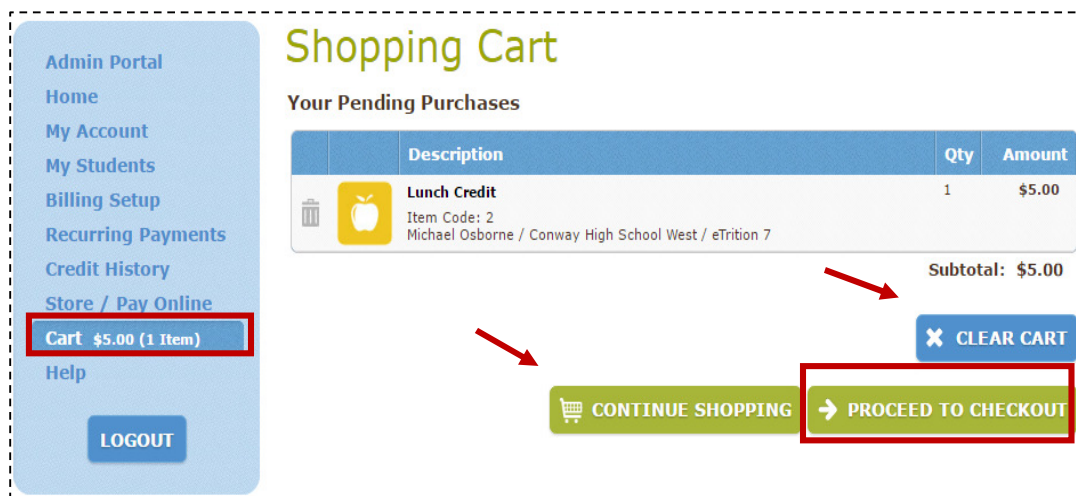




## Shopping Cart


The Shopping Cart allows the user to review the pending transaction(s), clear the pending items, or to complete/finalize the pending transaction(s).

1. To review the shopping cart, click the “Cart” link on the left side of the page. Review any pending transactions to confirm accuracy. To finalize the transaction(s), click the “Proceed to Checkout” button. The Cart can be emptied by clicking the “Clear Cart” button, if needed. To add additional items for purchase, click the “Continue Shopping” button:



**Shopping Cart**

Your Pending Purchases

Description	Qty	Amount
 <b>Lunch Credit</b> Item Code: 2 Michael Osborne / Conway High School West / eTriton 7	1	\$5.00

Subtotal: \$5.00

[CONTINUE SHOPPING](#)
[CLEAR CART](#)
[PROCEED TO CHECKOUT](#)







- Once the user clicks the "Proceed to Checkout" button in step 1, the screen that opens will prompt for payment information to finalize the transaction. Review the items in the cart to confirm accuracy, then enter (or select) the appropriate method of payment to be used. Once the items in the cart are confirmed, and a method of payment is entered/selected, to finalize the transaction, click the "Submit Order" button:

## Checkout

### Items In Cart

	Description	Qty	Amount
	<b>Lunch Credit</b> Item Code: 2 Michael Osborne / Conway High School West / eTrition 7	1	\$5.00

Subtotal: \$5.00

 Convenience Fee: \$2.75

**GRAND TOTAL: \$7.75**

### Payment Information

Payment Account

Payment Type\*

Card Number\*

Expiration Month/Year\*

CVV\*

### Billing Information

Billing Address

Address\*

City\*

State\*

Zip Code\*

### Confirmation

For maximum protection of your credit card information, your transaction will be completed by Moneris® when you click SUBMIT below. Please be sure not to use your browser's BACK or REFRESH buttons during this process.





## Help

The Help screen provides answers to frequently-asked questions and allows the user to submit questions to EZSchoolPay Support, or to school district contacts, when navigating the EZSchoolPay website.

1. Click the "Help" link on the left side of the page. Select the nature of your issue from the links provided:

**Admin Portal**

**Home**

**My Account**

**My Students**

**Billing Setup**

**Recurring Payments**

**Credit History**

**Store / Pay Online**

**Cart \$5.00 (1 Item)**

**Help**

**LOGOUT**

## Help

Please select the nature of your issue from the following:

- [Creating an Account](#)
- [Problems Logging In](#)
- [Adding/Linking a Student](#)
- [Updating Student Information](#)
- [Credit Card / eCheck / Payment Authorization](#)
- [Refunds / Adjustments / Balance Transfers](#)
- [Account Balance / Transaction History](#)
- [Low Balance Reminders](#)
- [Recurring Payments](#)
- [System Errors](#)







2. Depending on the nature of the issue selected, additional options will be displayed. Click the link that most accurately resembles the issue. Once selected, additional steps and/or clarification is displayed. If the issue requires assistance from either EZSchoolPay Support or district staff, the applicable contact information will be provided. At any point, clicking the "Start Over" option will allow the user to make a different selection, as needed:

## Help

### How do I add a student to my account?

Students can be "linked" to your account by using the "My Students" page.

- Click the "Add a Student" button on that page to get started.
- Select your district by clicking the magnifying glass icon, if it isn't already selected.
- Enter your child's last name and student number, then click the "Save" button.
- Some districts allow you to enter the student's birthdate instead of the number.

If you still have difficulty adding a student, choose the nature of the problem below:

[I can't find the district where my child is enrolled.](#)

[It asks for my child's "number" but I don't know what it is.](#)

[It asks for a "link lock" code but I don't know what it is.](#)

[I entered the correct information, but my child was not found.](#)

← BACK

← START OVER

Was this information helpful to you? [Yes](#) | [No](#)

