



2020.7.29 Release

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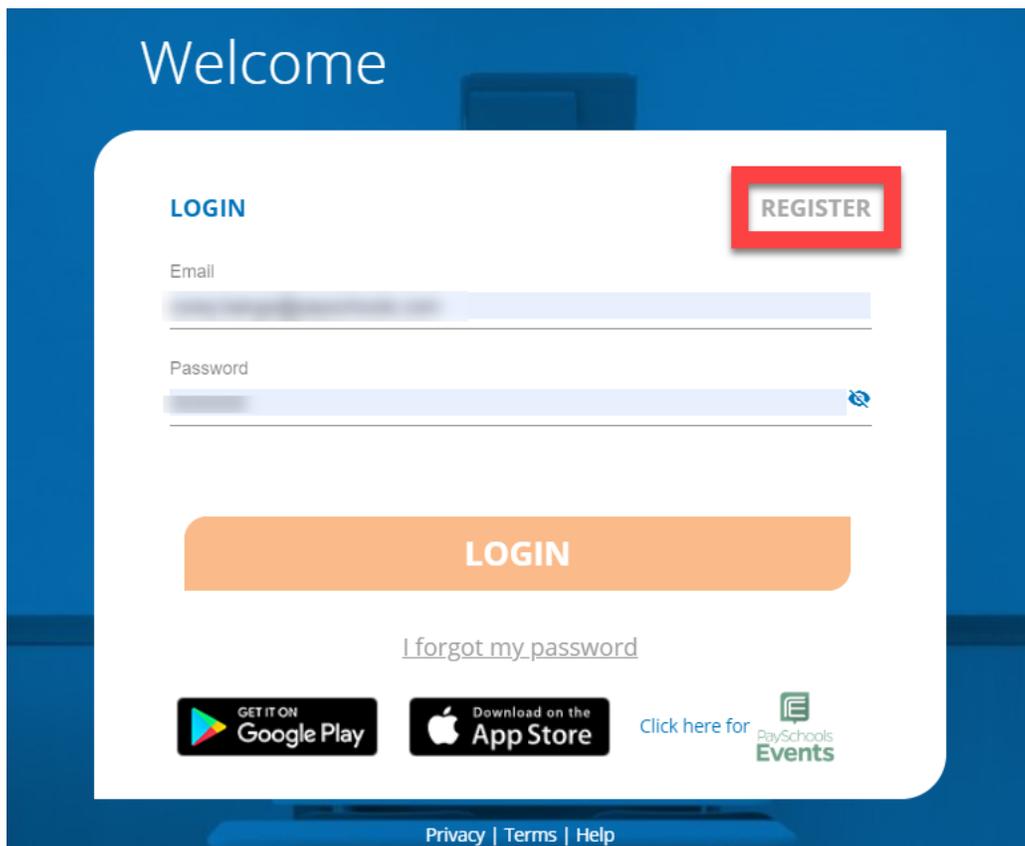
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Registration

Registration is quick and easy. Make sure to have all ID numbers for the people you wish to add to your account. For privacy purposes, PaySchools is unable to give out student information. Please contact your school if you need to validate.

Create User

- 1) To set up an account, go to www.payschoolscentral.com and click **REGISTER**.



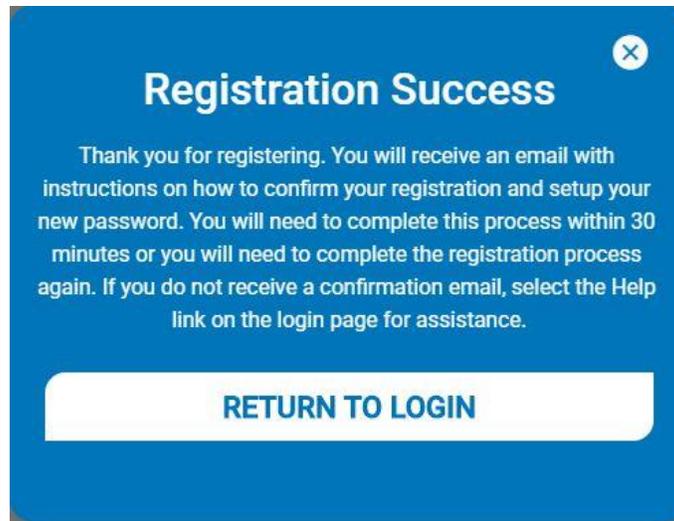
- 2) Fill out all fields marked with an asterisk (*). We strongly suggest adding a mobile number as it will help you reset your password via text if you ever have trouble logging in.

The screenshot shows the 'Register' page of the PaySchools Central system. The page has a blue header with the title 'Register' and a navigation bar with tabs for 'Register', 'Students', 'Payments', and 'Notifications'. The main content area is a white form with the following fields: 'Language Preference *' (dropdown), 'Email *' (text), 'First Name *' (text), 'Last Name *' (text), 'Address Line 1 *' (text), 'Address Line 2' (text), 'Postal Code *' (text with a help icon), 'City *' (text), 'State *' (dropdown), 'Country *' (dropdown), 'Phone Number' (text), and 'Mobile Number' (text). Below the fields is a checkbox with the text 'By checking this box, I agree to the terms of the PaySchools User Agreement.' and a large orange 'REGISTER' button. At the bottom of the form are links for 'Return To Login' and 'Clear All'. The footer contains links for 'Privacy | Terms | Help'.

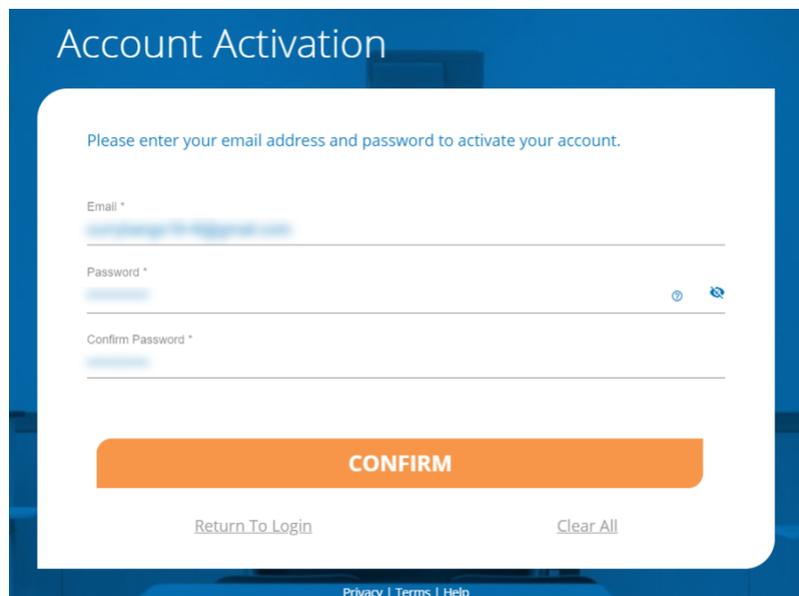
- 3) Review the User Agreement and check the box before clicking



- 4) Click  in the pop-up window and **check your email inbox** for a confirmation email.



- 5) You **MUST** click the link in the email in order to continue. This link is **ONLY VALID FOR 30 MINUTES**. If you do not activate the link within 30 minutes, please return to www.payschoolscentral.com and click [I forgot my password](#) to request a new email.
- 6) Create and confirm your password in the Account Activation screen after clicking the link in the email. You can view the password complexity rules by clicking [?](#)



Secure Account

You can always update your security questions after registration by going to the Menu and selecting the [Secure Account](#) option.

- 1) Fill out your 3 security questions and answers after setting up your password. Answers must be at least two characters long.
- 2) Click  to continue.

Secure Your Account

Register Students Payments Notifications

WE TAKE YOUR ACCOUNT SECURITY TO HEART.

If you contact our support desk for assistance, we'll ask you to answer security questions to confirm we're speaking with you.

Please select three questions and provide answers at least two characters long.

Security Question 1

Select Question *

Your Answer *

Security Question 2

Select Question *

Your Answer *

Security Question 3

Select Question *

Your Answer *

SECURE

[Return To Login](#)

Privacy | Terms | Help
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Add Student and/or Staff

You have the option to  this step and add your students/staff later via the [Dashboard](#). To add students after registration is complete, open the Menu and select the [Your Students](#) option.

- 1) Add your student(s) and staff by filling in all the required fields and clicking



You can add as many students to your account as you like, if they are in the same school district. If you have students in two or more districts, you will need to create separate accounts and use different emails/passwords for each district.

Your student or staff information must exactly match the details provided by your school. If you are having trouble adding your student/staff, please contact your school. PaySchools is unable provide student information for privacy reasons.

Add Student or Staff

Register Students Payments Notifications

INFORMATION

Due to privacy laws, PaySchools is unable to help you add students or staff to your account. The student or staff ID, first name, and last name you enter MUST match the information your district has provided to PaySchools. If you're having trouble adding a student or staff member to your PaySchools account, please contact your district to check their spelling or format of the name or ID number.

State *
District *
Student Id *
First Name *
Last Name *
Relationship *

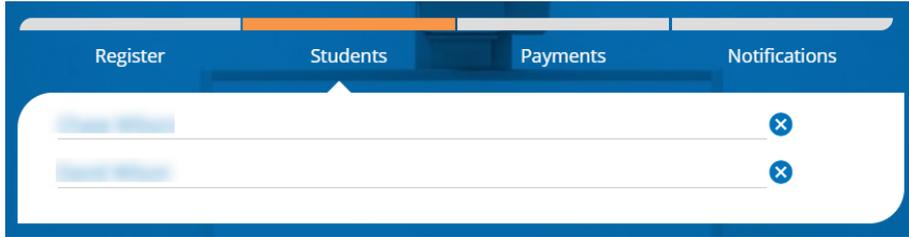
[Clear All](#)

ADD STUDENT / STAFF

SKIP

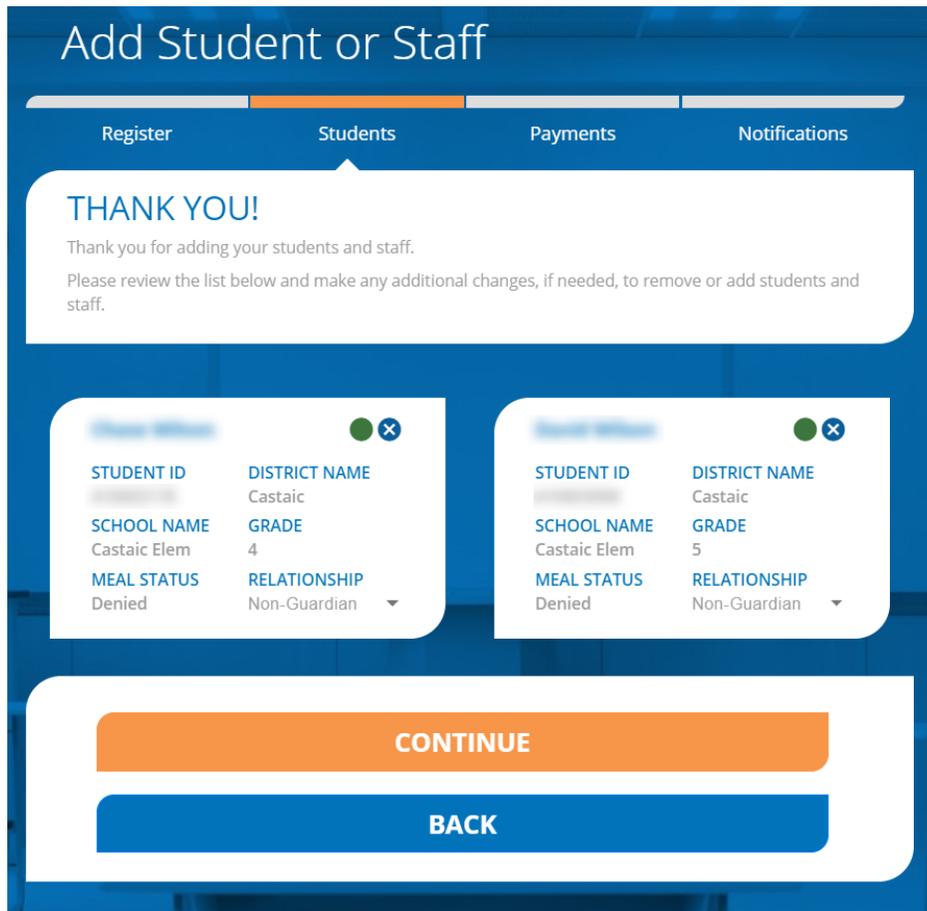
Privacy | Terms | Help

- 2) Once students and staff are added, they will appear at the top of the page where you can remove and manage your students/staff.



- 3) Click  once you've added all of your students and/or staff.

- 4) A summary screen will display all students and staff who've been added. A green circle in a student/patron's card indicates they're active. A red circle indicates they're inactive. If your student or staff is showing up as inactive, please contact your school for assistance.



Add Payment Methods

If you prefer not to store any payment information in your account, you can skip this step. You can either opt to make one-time payments or you can add payment methods later via the [Dashboard](#). To add or modify your payments any time after registration, open the Menu and select the [Payment Methods](#) option.

- 1) Choose the payment type. Please note school districts choose which payment methods are accepted.

Add Payment Method

Register Students **Payments** Notifications

INFORMATION

For your security, only the nickname you choose for your payment method will be displayed on the PaySchools screen when you make payments.

Payment Type

Select Payment Type *

[Clear All](#)

SKIP

BACK

[Privacy](#) | [Terms](#) | [Help](#)

- 2) Enter in the payment method information, including the payment type, nick name, and card number or routing/account numbers. The “Nickname” field is simply a name you can give your payment method. For example: Jane’s Visa CC.

Credit Card

Add Payment Method

Register Students **Payments** Notifications

INFORMATION
For your security, only the nickname you choose for your payment method will be displayed on the PaySchools screen when you make payments.

Payment Type
Select Payment Type *

Nick Name *
Jane's Visa CC

Card Number *

MM/YY * CVV Number *



Credit Card Processing terms and Conditions:
1. I authorized CP-DBS, LLC dba PaySchools, as owner and operator of payschoolscentral.com, to charge my account described above for non-recurring credit card transactions processed through the site.

By Checking this checkbox, I agree to the Credit Card Processing Terms and Conditions.

By checking this box, I am setting this as my default payment method.

[Clear All](#)

ADD PAYMENT METHOD

SKIP

BACK

[Privacy](#) | [Terms](#) | [Help](#)

ACH

Add Payment Method

Register Students **Payments** Notifications

INFORMATION

For your security, only the nickname you choose for your payment method will be displayed on the PaySchools screen when you make payments.

Payment Type
Select Payment Type *
ACH/Check

Nick Name *

My Checking Account

Account Type *
Checking

Account Number *

Routing Number *

ACH Electronic Check Processing Terms and Conditions:

1. I authorize CP-DBS, LLC dba PaySchools, as owner and operator of payschoolscentral.com, to debit my account described above for non-recurring ACH Electronic transactions processed through the site.
2. I agree to pay a return fee of up to \$30.00 if my ACH transfer is returned unpaid. CP-DBS, LLC dba PaySchools may represent my transfer up to two more times. I authorize CP-DBS, LLC dba PaySchools to make a one-time electronic fund transfer from my account to collect the \$30.00 fee. If my electronic transfer remains unpaid, my debt will be turned over to a collection company or a check recovery company that may charge me a processing fee, as permitted by law. Any information I provide while registering for payschoolscentral.com can be used in this process.

By Registering above account for credit/ACH transfers, I acknowledge that I am an authorized signer of this account.

By checking this box, I agree to the ACH electronic check processing terms and conditions.

By checking this box, I am setting this as my default payment method.

[Clear All](#)

ADD PAYMENT METHOD

SKIP

BACK

Privacy | Terms | Help

- 3) Please read the terms and conditions for each payment method and check the box to agree. Click **ADD PAYMENT METHOD** to add your payment method.

- 4) You can store multiple payment methods in your account, including credit/debit cards and ACH. To add another payment method, select another payment type from the drop-down menu and follow steps starting on the [Add Payment Methods](#) section of this guide. You can also add more payment methods later by going to the Menu and clicking the [Payment Methods](#) option.

Email Notifications

PaySchools Central gives you the ability to set up a variety of email notifications. You have the flexibility to turn each option on or off and to make changes at any time. The emails will automatically send to the email address associated with your account.

- 1) To turn on any of the notifications, simply click the on/off toggle. An orange toggle indicates the notifications are on.

Notifications

Register Students Payments **Notifications**

Meal Account Instructions ⓘ

Balance	Amount \$ 5.00	Low Meal Balance	<input checked="" type="checkbox"/>
Day of Month	Select Day Last Day	Balance Reminder	<input checked="" type="checkbox"/>

Fees Instructions ⓘ

Days Notice	Select Day 1	Fee Due	<input checked="" type="checkbox"/>
Days Notice	Select Day 1	Upcoming Payment	<input checked="" type="checkbox"/>
Days Overdue	Select Day 1	Overdue Fee	<input checked="" type="checkbox"/>

Fund Account Instructions ⓘ

Balance	Amount \$ 5.00	Low Fund Balance	<input checked="" type="checkbox"/>
Day of Month	Select Day Last Day	Balance Reminder	<input checked="" type="checkbox"/>

Monthly Statement Instructions ⓘ

Day of Month	Select Day Last Day	Monthly Statement	<input checked="" type="checkbox"/>
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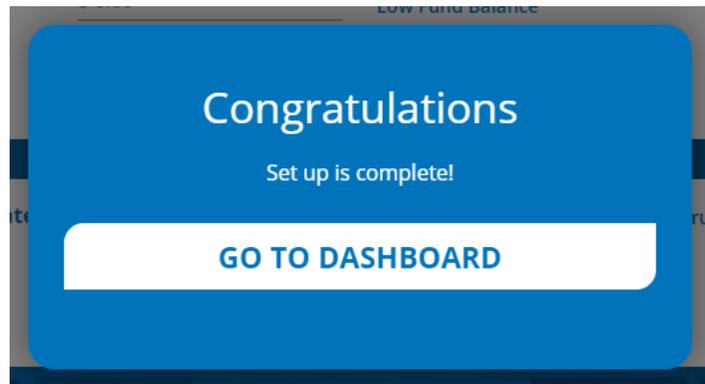
[Reset All](#)

CONTINUE

BACK

Privacy | Terms | Help

- 2) There are instructions for each section to give you more information about each type of notification. Click [Instructions](#)  to see the notification descriptions.
- 3) To save your notification settings, click .
- 4) The registration process is now complete!



Dashboard

One of PaySchools Central’s many new features is the Dashboard landing page. The Dashboard is where you can view the students and staff associated with your account as well as meal, fund, and fee account summaries depending on what your district offers.

Dashboard

All Students

Meal

Name	Balance	Bonus Balance	Action
[Redacted]	\$5.80	\$0.00	[Action]
[Redacted]	\$0.00	\$0.00	[Action]

Fees

All Fees
All Fees

Search

Fees

School Fees for Jan 2020

Assigned Fee

Fund Account

Name	Account Name	Balance	Action
[Redacted]	After School Program	\$0.00	[Action]
[Redacted]	After School Program	\$5.00	[Action]

Privacy | Terms | Help

Dashboard

Notifications

- Messages
- Notifications

Account

- Your Profile
- Secure Account
- Your Students
- Payment Methods
- Auto Replenishment
- Digital ID
- Pre-Order Meals

History

- Payment History
- Reports

School District

- Free/Reduced Meal Application
- Share Benefits with other Departments
- View Completed Application
- School Events

Information

- Help
- Privacy
- Terms and Conditions

Logout

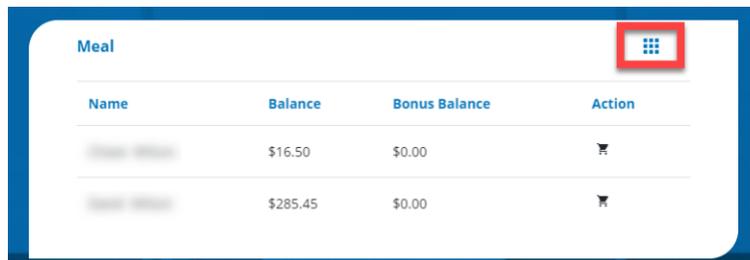
You can access the Menu from any page on the site. Click on the  in the upper right-hand corner of the screen to access any of the site’s features including your account settings.

Lunch Payments

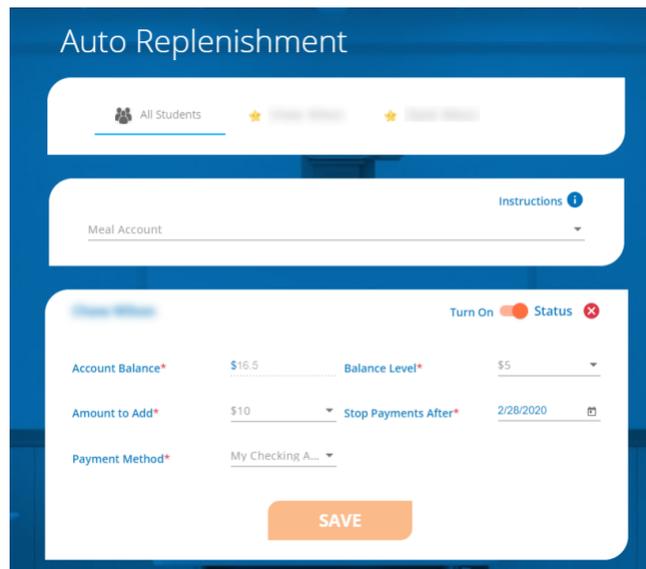
PaySchools Central makes it easy to add funds to your meal account. You can make a single lunch payment or you can take advantage of our convenient Auto-Replenishment feature, which automatically deposits money when your balance reaches a certain level.

Auto-Replenishment \ Recurring Payments

- 1) To set up auto-replenish, click the Auto-Replenishment option in the menu. You can also access Auto-Replenishment by clicking  in the Meal card.

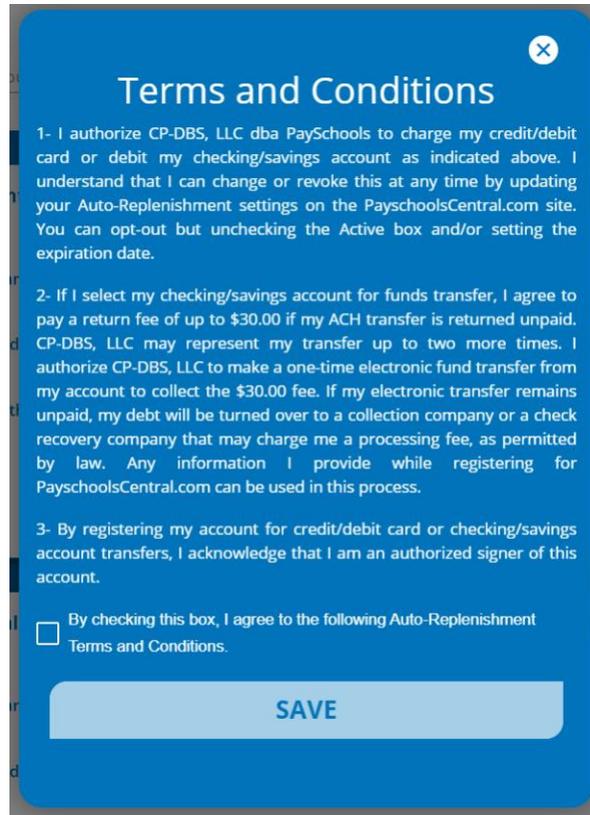


- 2) You will see your list of students and can either select a single name to set up unique auto-replenish settings or you can select All Students to apply the same settings to everyone in your account.



- 3) Once you've selected your student(s), enter in the required fields and click .

- 4) Read the Terms and Conditions and agree by putting a check mark in the box and clicking



- 5) The toggle will turn orange, which indicates auto-replenishment is on.
- 6) Once your auto-replenish settings have been saved, you will see a status icon next to the toggle. Hover over the icon to see the auto-replenish status.

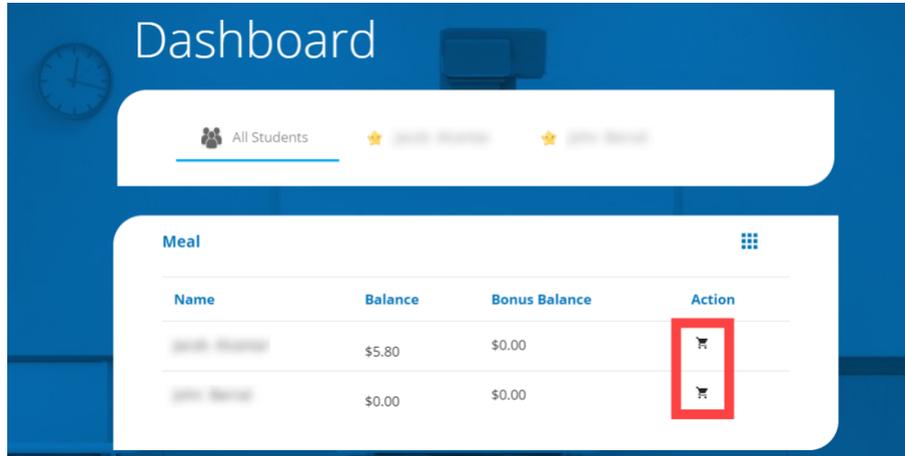
Status  indicates the balance level has been met and your account will be replenished that day.

Status  indicates the balance level has not yet been met and auto-replenishment has not kicked off.

- 7) To make changes to your auto-replenish settings, such as the amount to add or expiration date, apply your changes, click , read and agree to the Terms and Conditions by checking the box, and click .
- 8) To turn off auto-replenish, simply click the orange toggle to turn it off. When auto-replenish is off, the toggle will be grey.

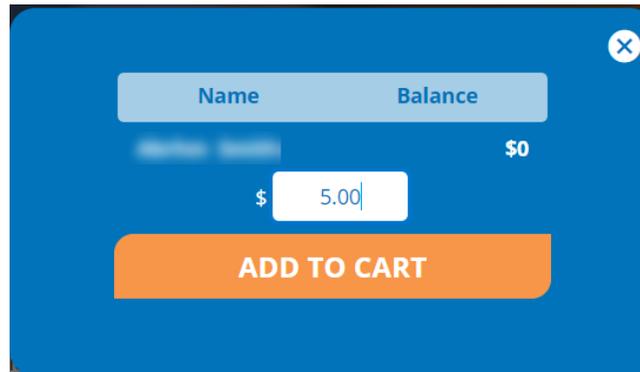
One-Time Lunch Payment

- 1) To make a one-time lunch payment, go to the Dashboard and click the  to the right of your student's name.



- 2) Enter the amount you wish to add to the lunch account and click

ADD TO CART

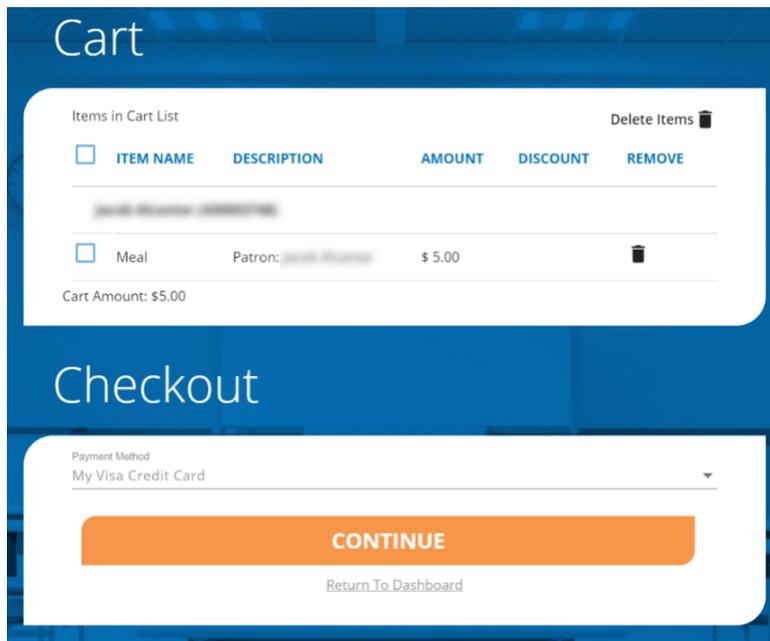


- 3) You will now see a blue circle in the upper right-hand corner of your screen where your cart is. The blue circle indicates there are items in your cart and the number indicates the amount of items.

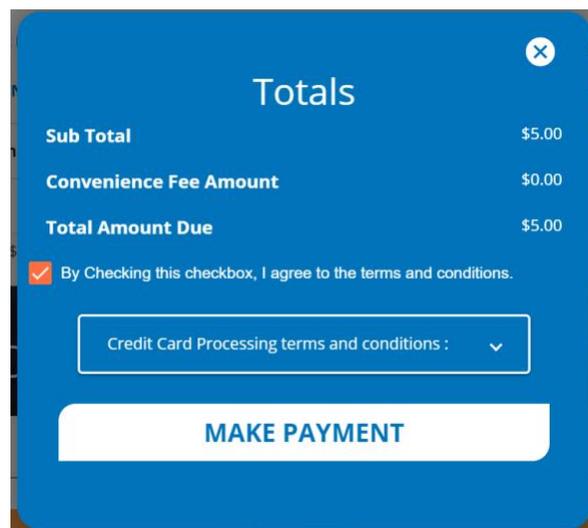


- 4) To check out, click on the white shopping cart in the upper right-hand corner of the Dashboard screen.

- 5) Review and update the items in your cart and make any necessary changes.
- 6) Select your payment method and click 



- 7) Check the box in the Totals pop-up window to agree to the terms and conditions and click 

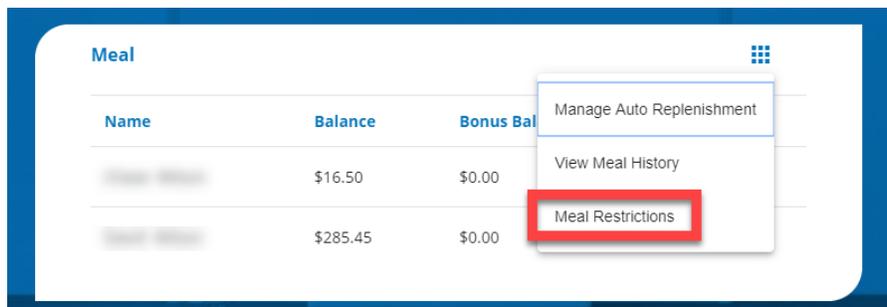


- 8) After completing your purchase, you will receive an email with a receipt listing the item(s) purchased. You can also view your payment history by opening the menu and clicking on the Payment History option.

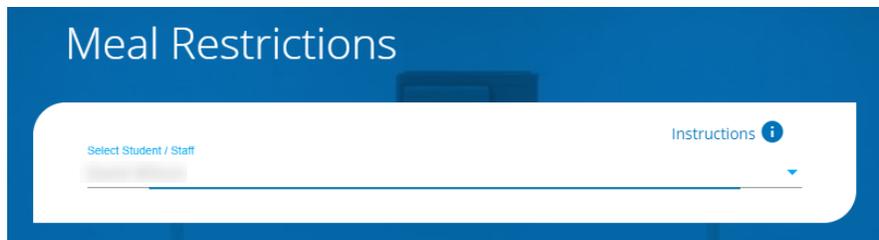
Meal Restrictions

One of the most unique features available in PaySchools Central is the Meal Restrictions screen. On this screen, you can set a daily spending limit as well as select specific items, groups, and meals you don't want your student to purchase.

- 1) To access the Meal Restrictions screen, go to the Students/Staff card at the top of the Dashboard and click the  icon. Click on the Meal Restrictions option in the drop-down menu.

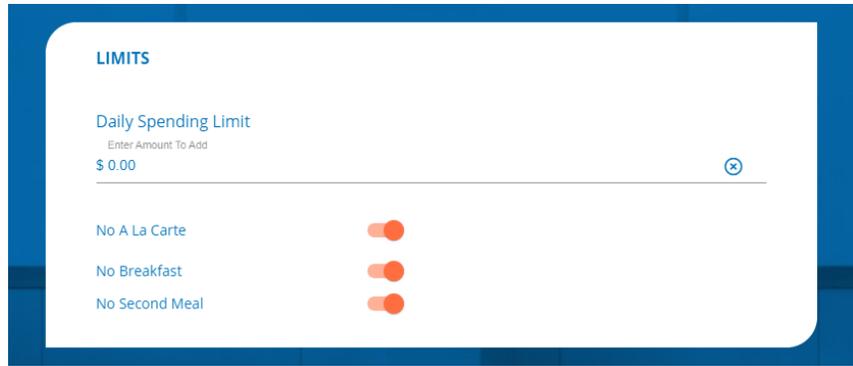


- 2) From the drop-down menu, select the student whose restrictions you wish to modify.



Limits

- 1) You can restrict your patron to a daily spending limit by entering in a certain amount, beyond which the patron is not allowed to purchase. If left empty, there will be no limit for the patron to spend. Setting the limit to \$0 dollars will completely restrict your student from purchasing anything offered by the school district.



LIMITS

Daily Spending Limit
Enter Amount To Add
\$ 0.00

No A La Carte

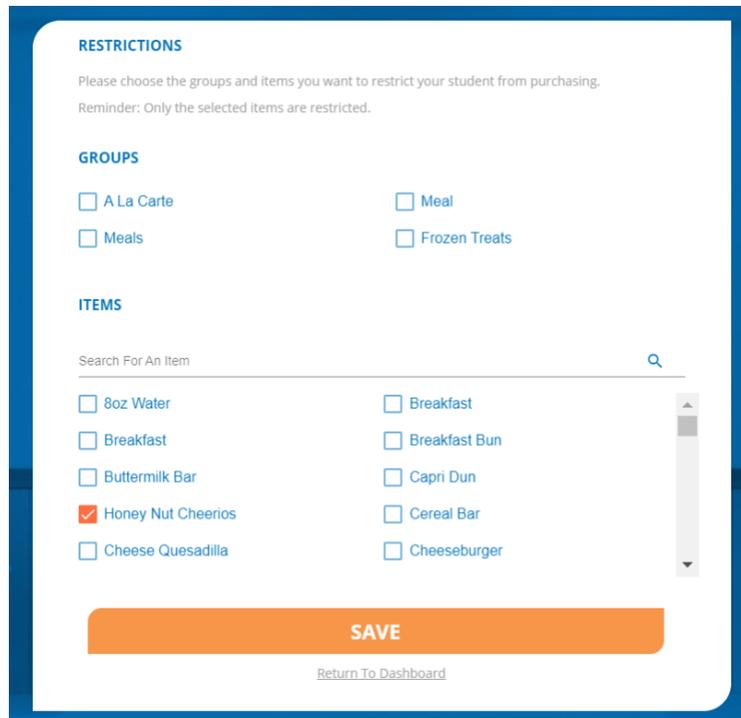
No Breakfast

No Second Meal

- 2) If you would like your student NOT to purchase certain items, like a la carte items, breakfast, or second meals, turn the toggle to the on position. An orange toggle indicates the restriction is on.

Restrictions

- 1) You can also restrict based on meal type, individual items or item groups for your patrons. Put a checkmark next to any item you **do not** want your student to purchase.
- 2) You can search for specific items with the search bar or you can simply scroll through the list of items set up by your school district.



RESTRICTIONS

Please choose the groups and items you want to restrict your student from purchasing.
Reminder: Only the selected items are restricted.

GROUPS

A La Carte Meal

Meals Frozen Treats

ITEMS

Search For An Item

8oz Water Breakfast

Breakfast Breakfast Bun

Buttermilk Bar Capri Dun

Honey Nut Cheerios Cereal Bar

Cheese Quesadilla Cheeseburger

SAVE

[Return To Dashboard](#)

All items are set up and maintained by your school district. If you do not see a certain item or have questions about the items listed, please contact your school directly.

- 3) Click  to submit your limits and restrictions.

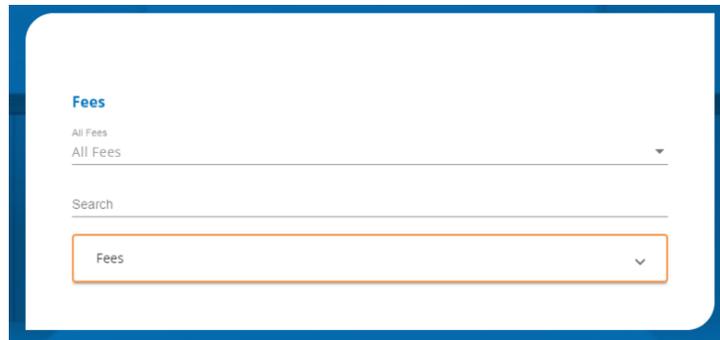
Fee Payments

If your School District is not using the fees module you will not see this feature. All fees are set and maintained by your School District. If you do not see a certain fee in your PaySchools Central account, please contact your School District.

You may or may not have the ability to adjust the amount to pay. Your district determines whether you can pay in installments or not. If you have any questions about your fees, please contact your school directly.

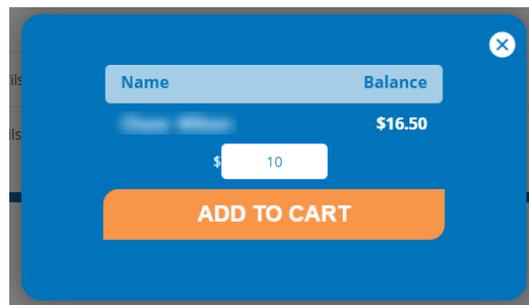
One-Time Fee Payments

- 1) To make a one-type fee payment, go to the Dashboard and scroll down to the Fees card.

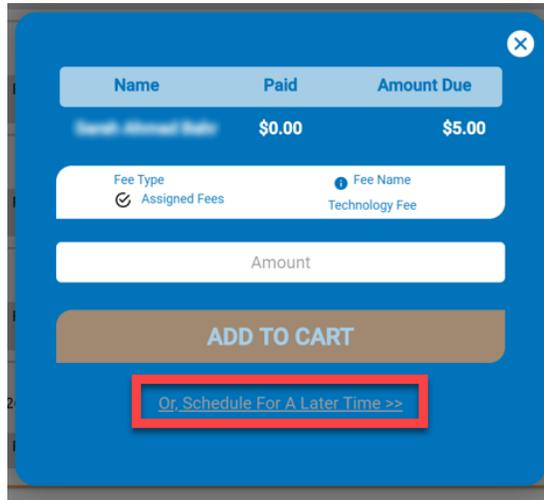


- 2) In this card, you can either find a fee in the orange box, search for a fee in the Search bar or use the pre-set drop-down filters.

- 3) To add a fee to your cart, click the  icon next to the fee, enter in the amount you wish to pay and click .



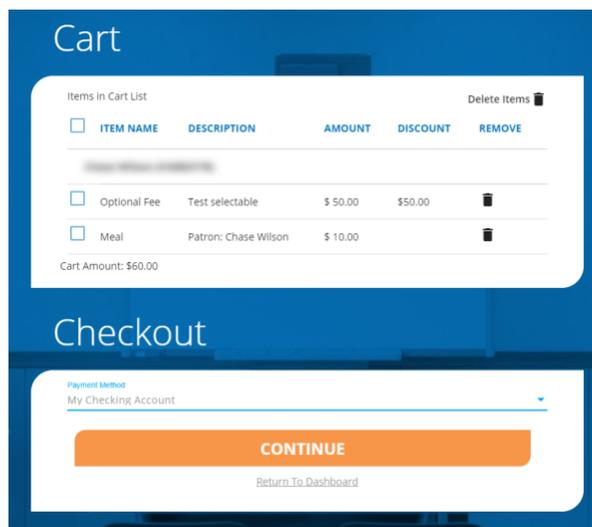
- 4) If you would like to schedule this payment for a later date, click [Or, Schedule For A Later Time >>](#). To learn how to schedule a fee, see the [Schedule One or More Fee Payments](#) section of this guide.



- 5) You will now see a blue circle in the upper right-hand corner of your screen where your cart is. The blue circle indicates there are items in your cart and the number indicates the number of items.



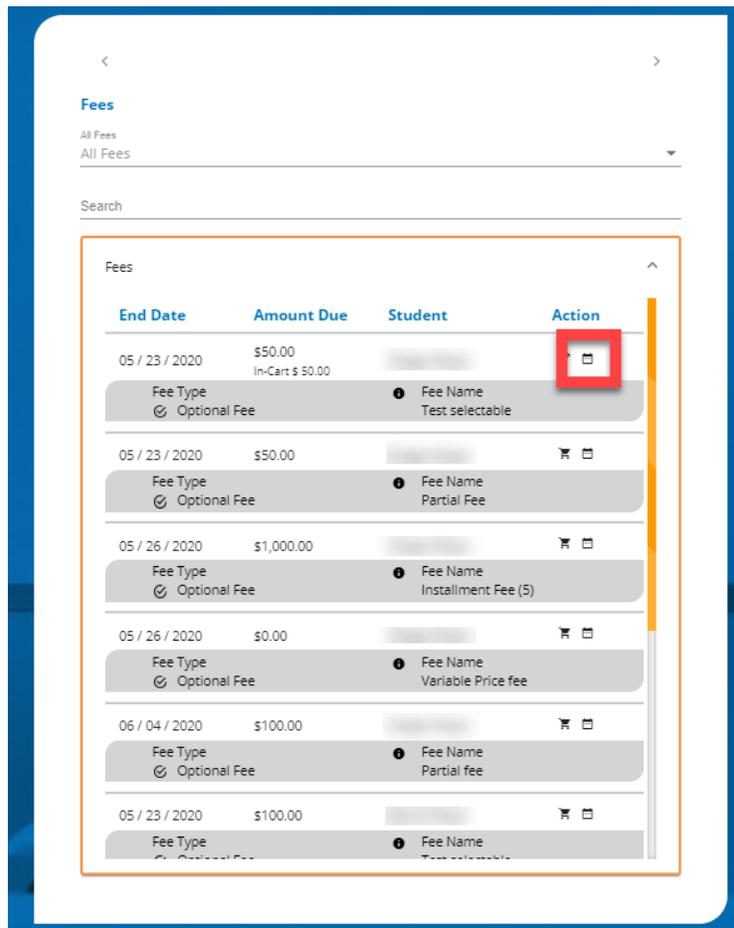
- 6) Click on the white cart icon and review the items in your cart in case you need to make any changes. Select your payment method and click **CONTINUE**.



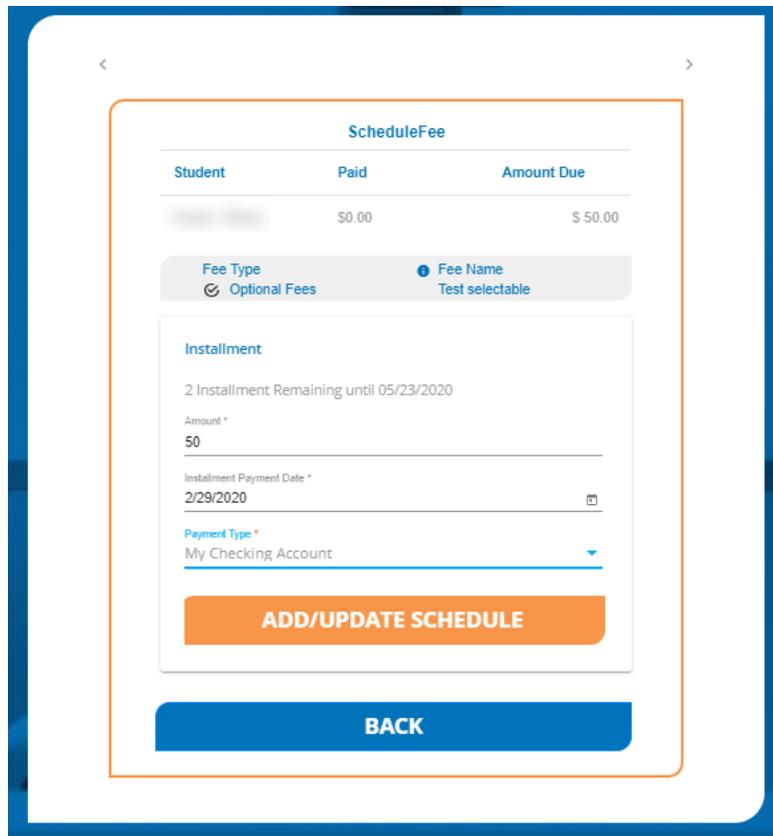
- 7) After completing your purchase, you will receive an email with a receipt listing the item(s) and transaction amount. You can also view your payment history by opening the Menu and clicking the [Payment History](#) option.

Schedule One or More Fee Payments

- 1) To help you avoid missing important fee payment due dates, PaySchools Central allows you to schedule and automate fee payments.
- 2) To schedule one or more future payments, find your fee in the Fees card and click on the  icon to the right of the fee you wish to schedule.



- 3) Select the date you wish to pay the fee as well as the amount to pay.

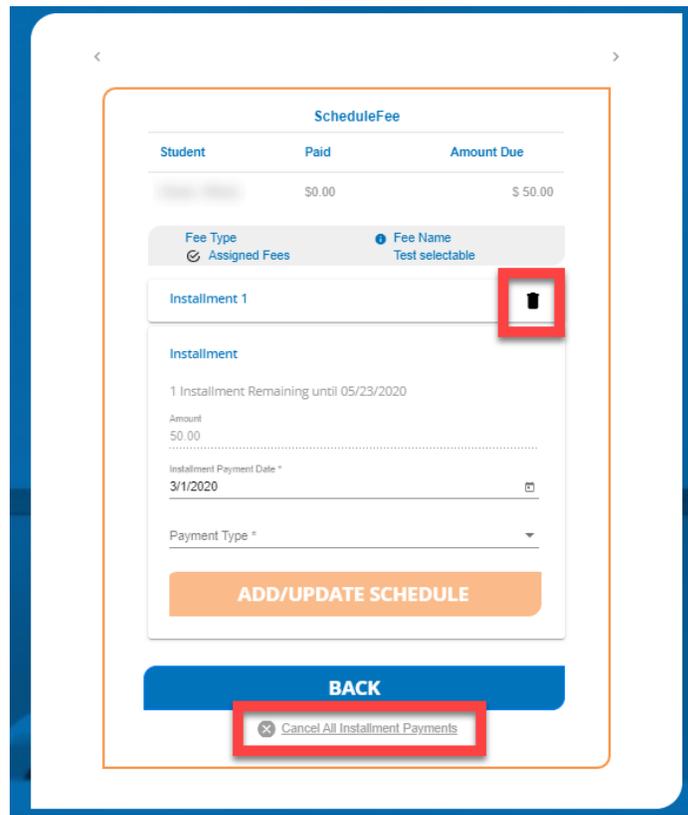


- 4) The total amount due must be paid before the district's determined due date.
- 5) The earliest scheduled payment is the following day. You cannot schedule a payment the same day you are setting it up and you must select a scheduled date before the fee's due date
- 6) Click  to schedule your fee payment.

Please note your payment will not show up in your cart, but you can view/modify the scheduled payment by going to the Fee card in your dashboard and clicking the  next to any scheduled fee payment.

- 7) You will receive a reminder notification the day before the scheduled payment as well as an email receipt when the payment is processed. You can view the same messages by clicking the Messages option in the Menu.
- 8) If you wish to cancel one scheduled payment, find any scheduled fee in your Fees card and select Scheduled Fees from the All Fees drop-down menu. Click on the  icon next to the fee and

click the  icon. If you wish to cancel all scheduled payments, click Cancel All Installment Payments and Yes to confirm.



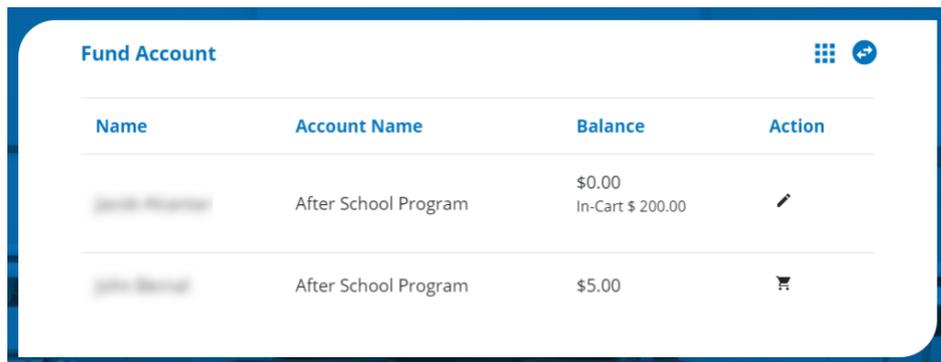
9) If you need to edit your schedule date and/or amount, click Installment # to the left of the  icon.

Fund Account Payments

If your district utilizes fund accounts for certain programs, such as daycare, you can add money and transfer funds between your students via the Fund card found on the Dashboard.

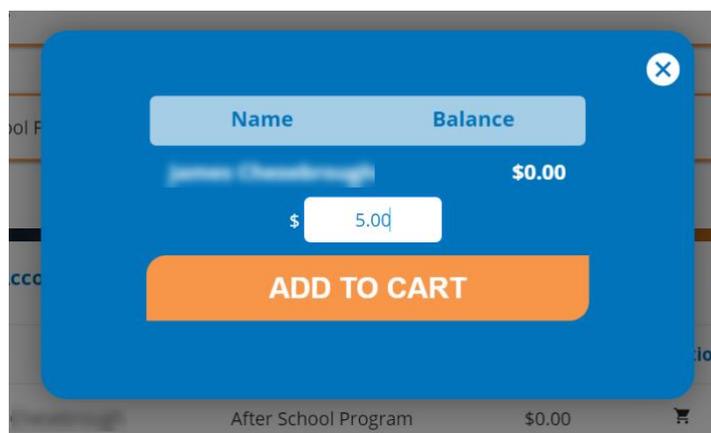
One-Time Payment

- 1) To access the Fund card, scroll to the Fund card on the Dashboard.



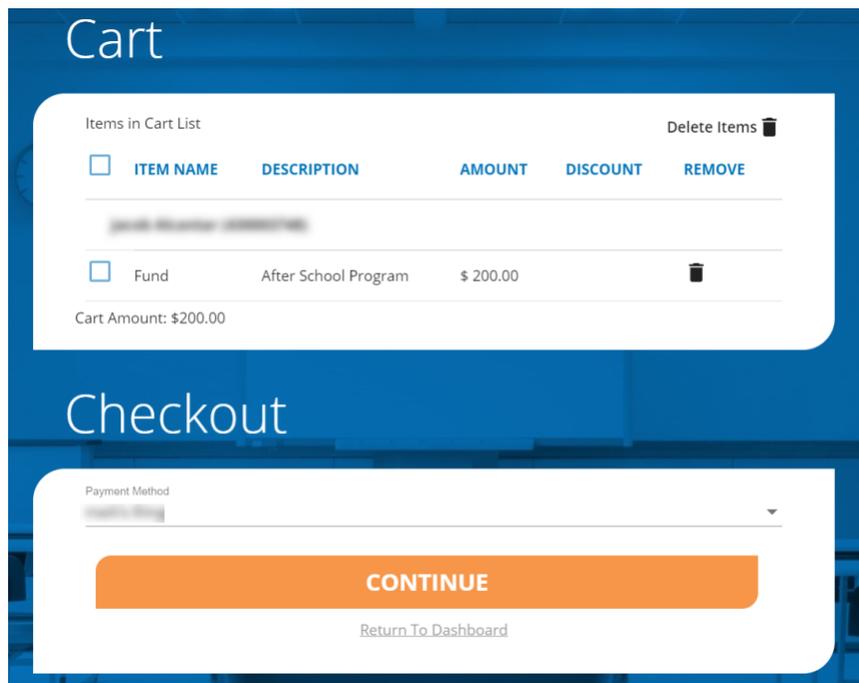
Name	Account Name	Balance	Action
[blurred]	After School Program	\$0.00 In-Cart \$ 200.00	[edit icon]
[blurred]	After School Program	\$5.00	[shopping cart icon]

- 2) To add money to your Fund account, click on the  icon.
- 3) A pop-up window will appear where you can enter the amount you'd like to add to your fund account. Enter in the amount you wish to add and click .



- 4) You will now see In-Cart \$###.## below the name of the associated student or staff. You will also see the blue icon over the  icon in the upper right-hand corner of the Dashboard.
- 5) To begin the checkout process, click the  icon. You can also add other items to your cart before completing your purchase.
- 6) Double check the items in your cart and make any necessary changes. Your default payment method appears at the top of the drop-down menu; however, you can select another existing payment method or select USE NEW CARD before clicking

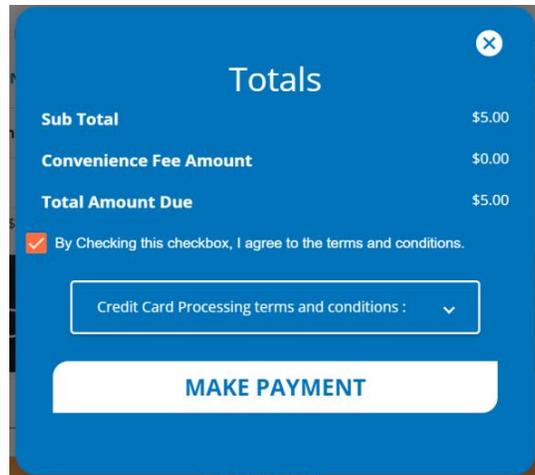




- 7) Review the Terms and Conditions and put a checkmark in the box before clicking



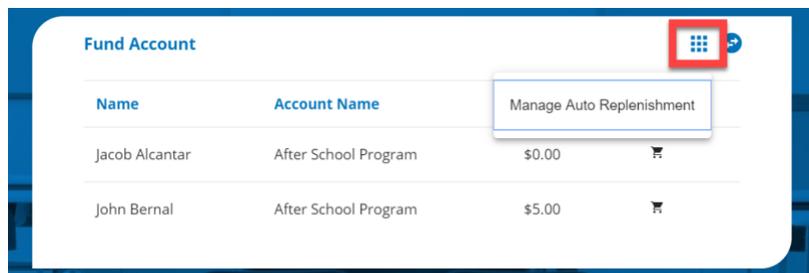
Do not refresh or close your screen until the payment is finished processing.



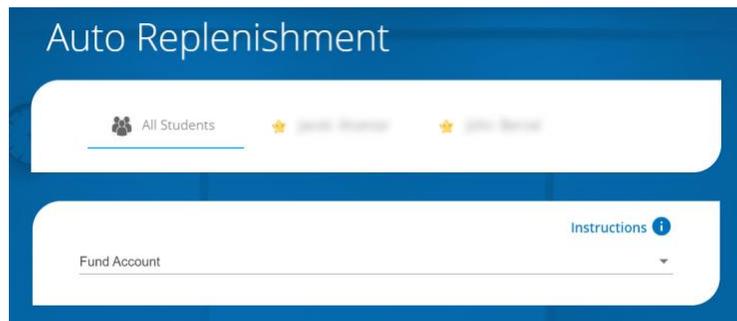
- 8) A receipt will be soon be emailed to the address associated with your account. You can also view an identical copy of the receipt in the Messages option in the Menu.

Auto-Replenishment \ Recurring Payments

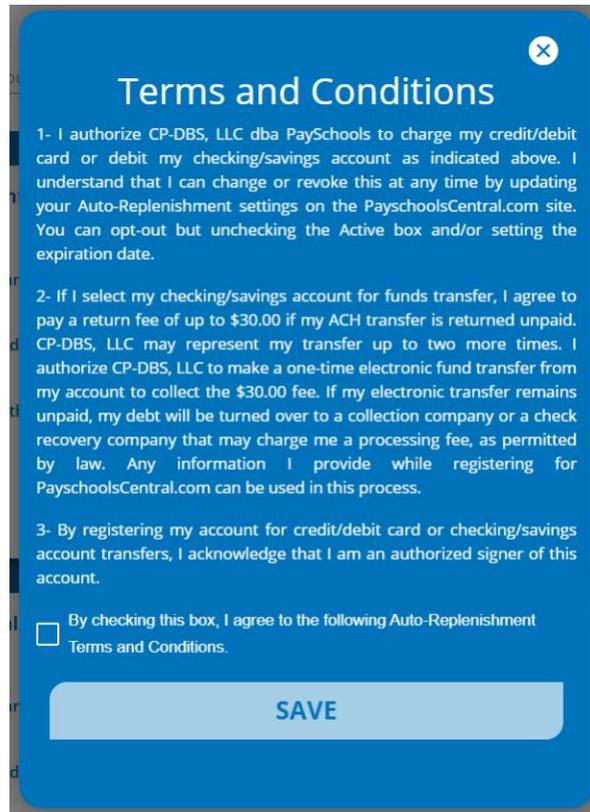
- 1) To set up auto-replenish, click the Auto-Replenishment option in the menu. You can also access Auto-Replenishment by clicking  in the Fund card.



- 2) You will see your list of students and can either select a single name to set up unique auto-replenish settings or you can select All Students to apply the same settings to everyone in your account.



- 3) Once you've selected your student(s), enter in the required fields and click .
- 4) Read the Terms and Conditions and agree by putting a check mark in the box and clicking .



- 5) The toggle will turn orange, which indicates auto-replenishment is on.
- 6) Once your auto-replenish settings have been saved, you will see a status icon next to the toggle. Hover over the icon to see the auto-replenish status.

Status  indicates the balance level has been met and your account will be replenished that day.

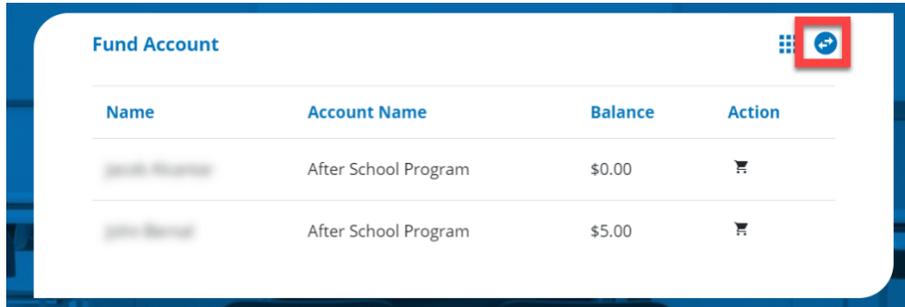
Status  indicates the balance level has not yet been met and auto-replenishment has not kicked off.

- 7) To make changes to your auto-replenish settings, such as the amount to add or expiration date, apply your changes, click , read and agree to the Terms and Conditions by checking the box, and click .

- 8) To turn off auto-replenish, simply click the orange toggle to turn it off. When auto-replenish is off, the toggle will be grey.

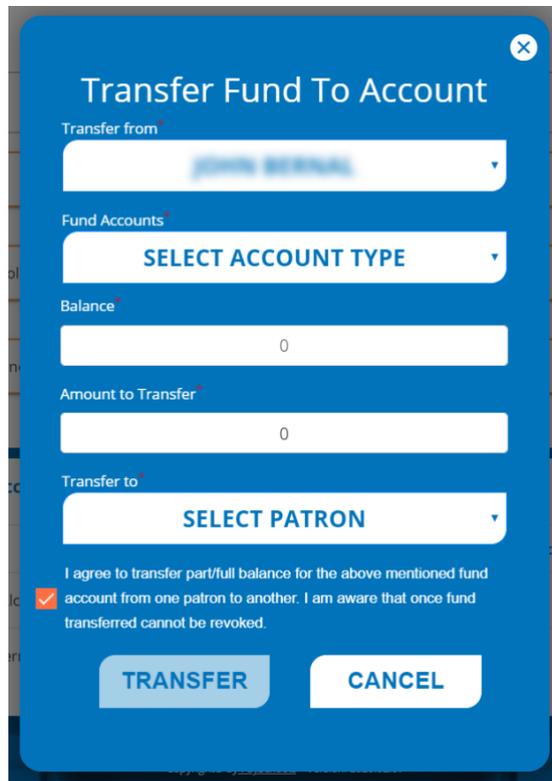
Transfer Funds Between Students

- 1) If you wish to transfer money from one patron to another, this is another option available in the Fund card.
- 2) To transfer funds between accounts, scroll down to the Fund card and click .



Name	Account Name	Balance	Action
John Brown	After School Program	\$0.00	
John Brown	After School Program	\$5.00	

- 3) A pop-up window will appear. Select the student/staff you wish to transfer the funds from as well as the student/staff you wish to transfer the funds to.



Transfer Fund To Account

Transfer from:

Fund Accounts:

Balance:

Amount to Transfer:

Transfer to:

I agree to transfer part/full balance for the above mentioned fund account from one patron to another. I am aware that once fund transferred cannot be revoked.

TRANSFER **CANCEL**

4) The balance of the selected fund account will appear where it reads Balance. In the text box below the balance, enter in the amount you wish to transfer.

5) You must agree to the transfer as well as put a check mark in the box before you can click



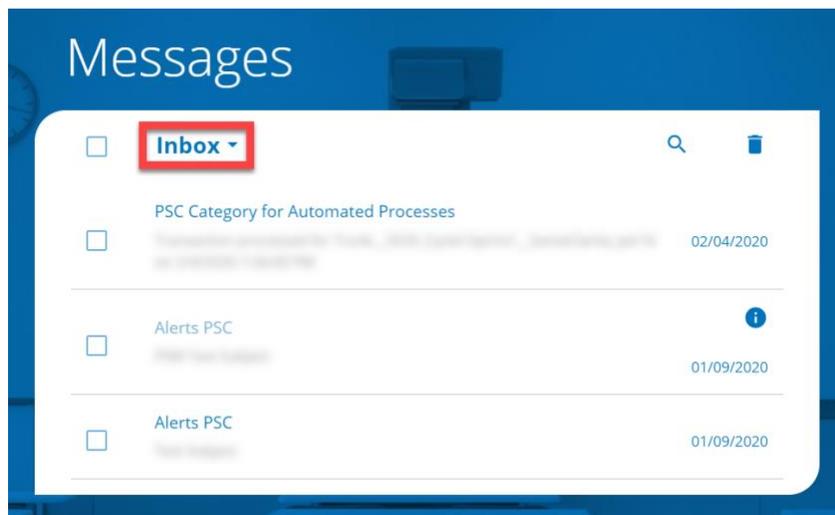
Messages

Another convenient feature offered by PaySchools Central is the Messages screen. Check this section for copies of your payment receipts, scheduled payment information, and important messages sent directly from your school district.

- 1) To access your messages, go to the Menu and click the Messages option.



- 2) A blue circle with a number in it indicates you have an unread message in your inbox.
- 3) To search for a message, you can either filter your messages via the drop-down menu where it reads Inbox, or you can click the  icon to search for a specific message.



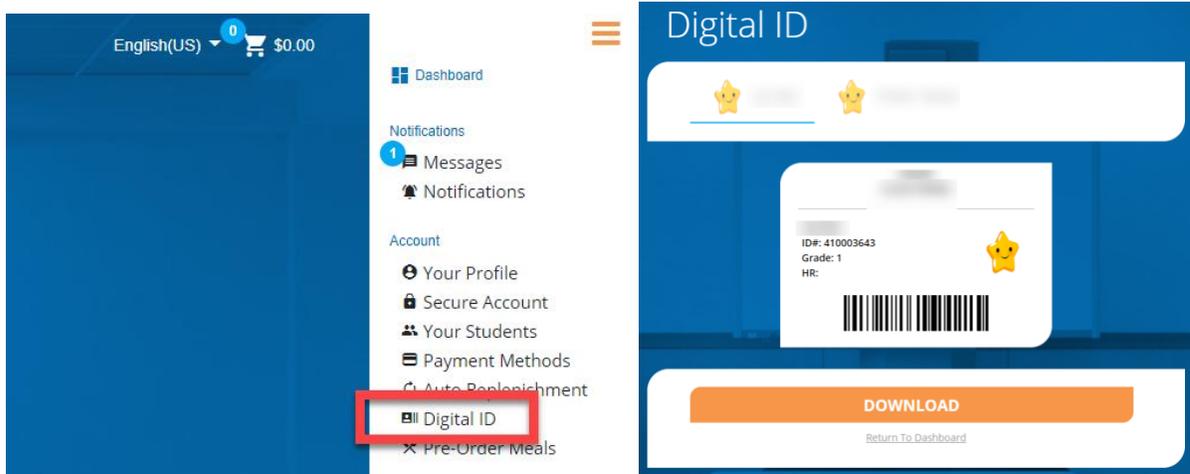
- 4) To delete a message, you can either open the message by clicking on it and clicking Delete or you can put a check mark next to the messages you wish to delete before clicking  in the upper right-hand corner of the card. You can access any deleted message by selecting Trash from the Message card drop-down menu.

Digital ID

PaySchools Central now offers a digital copy of your student’s ID card. This can be access directly from your PaySchools Central account. Say goodbye to lost ID cards and sticky pin-pads and hello to touchless scanners and ID cards you can scan directly from your mobile device.

Accessing your Digital ID

- 1) Open the Menu on the right-hand side of the screen by clicking the hamburger icon and click “Digital ID.” You will be taken to the Digital ID screen where you can see all of your students’ ID cards and barcodes.



Saving your Digital ID to Your Device

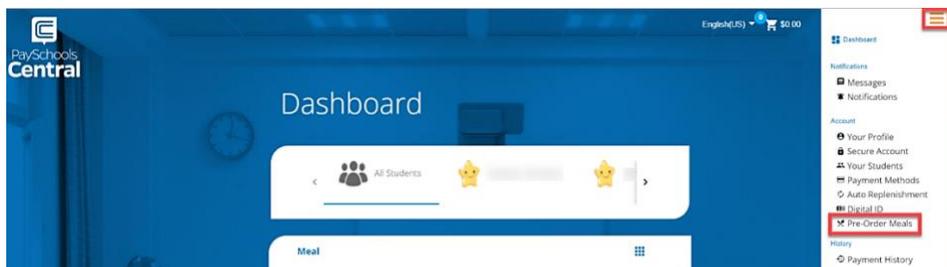
- 1) On a smartphone – You can either take a screenshot of the digital ID on the screen or you can save your ID as a PDF or picture by tapping **DOWNLOAD**. As long as the device’s screen is in working order, your student will be able to scan the device in the lunch line without having to touch a pin-pad.
- 2) On a computer – Click **DOWNLOAD**, go to your Downloads folder, and save the file to a place you’ll remember. Saving your digital ID to a computer is not necessary unless you would like to print your ID card.

Pre-Order / myMealOrder

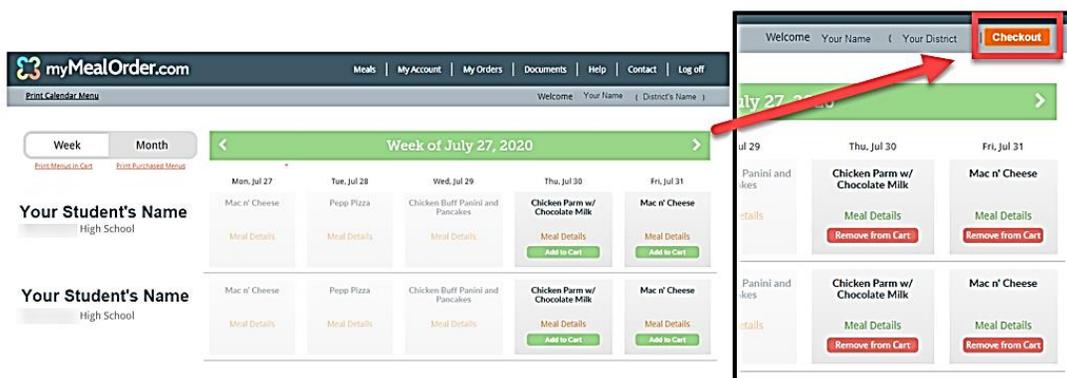
The PaySchools pre-order system, powered by myMealOrder makes preordering meals quick, easy, and secure. With our preorder system, you can plan and pay for your students' meals several days in advance. Please note, if your district doesn't offer preorder, this feature may not be available in your PaySchools Central Menu.

Getting to myMealOrder

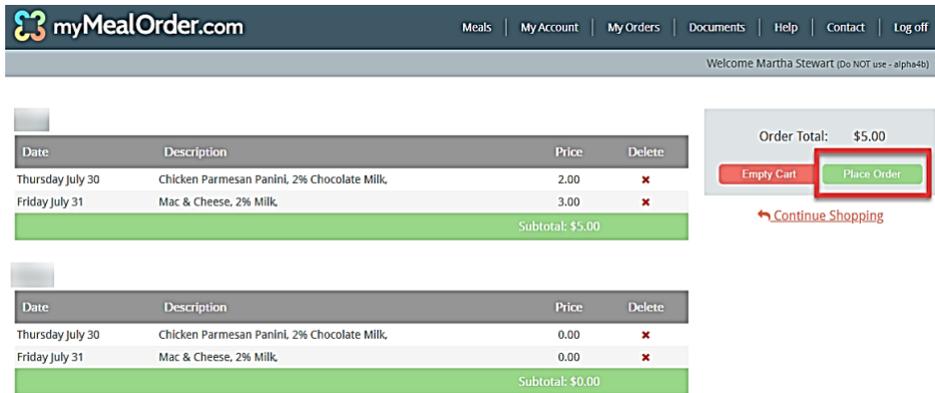
- 1) Open the Menu on the right-hand side of the screen by clicking the hamburger icon, click "Pre-Order Meals," and you will be directed to myMealOrder's website. You will not need to register nor sign in to myMealOrder as all of your account and students' information will have already been transferred.



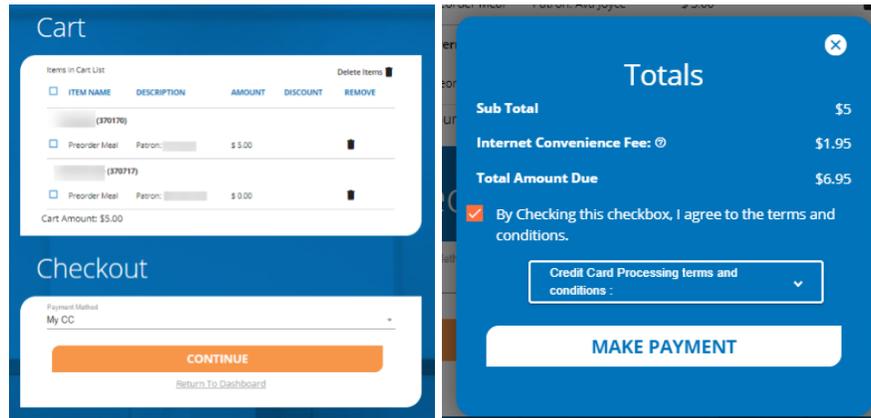
- 2) Choose meals/items for each student for the days you wish to pre-order for. Once your items have been added to your cart, click **Checkout** as pictured below.



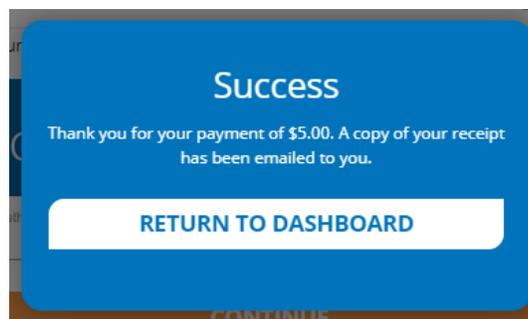
- 3) Review your total and click **Place Order**. You will then be re-directed to PaySchools Central to process your payment.



- 4) Select your payment method, click **CONTINUE**. Review your totals and check the terms and conditions box to agree and then click **MAKE PAYMENT** to process your preorder selections and payment.



- 5) Make sure not refresh your screen while the payment processes. Once you have processed your payment in PaySchools Central 2.0 account, you will receive an email receipt as well as a message with order details in your PaySchools Central Account.



Payment History

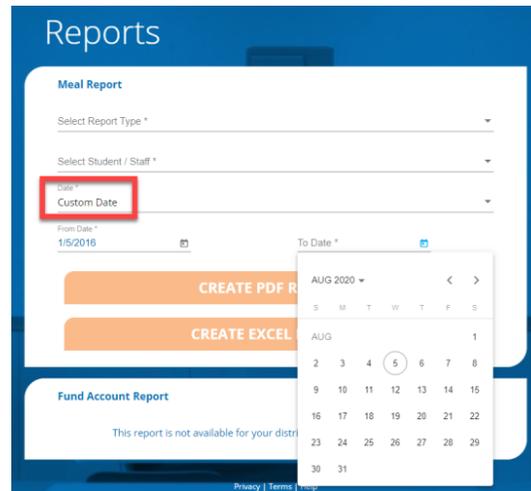
You can view a complete history of your fee, meal, and fund account payments in your PaySchools Central account depending on what your district offers.

- 1) To view payment history, go to the Menu and clicking the Payment History option. Your payments will be listed from the left to right with the most recent payment on the left.

The screenshot displays the 'Payment History' page. At the top, there are two dropdown filters: 'Type' set to 'All' and 'Date' set to '30 days'. Below the filters is a table with two columns of payment data. The table includes fields for Name, Date, Transaction Id, Payment History Type, Payment Mode, Balance Level, Fee Name, Amount, ICF, Payment Method, and Status. At the bottom of the table, there is a 'Reset All' link, two orange buttons labeled 'CREATE PDF REPORT' and 'CREATE EXCEL REPORT', and a 'Return To Dashboard' link.

Name		
Date	02/07/2020 15:13:00	01/16/2020 16:41:00
Transaction Id	223133	221973
Payment History Type	Meal	Meal
Payment Mode		
Balance Level	NA	NA
Fee Name	NA	NA
Amount	\$ 10.00	\$ 10.00
ICF	\$ 0.00	\$ 0.00
Payment Method	ACH PFI - 6666	CC PFI
Status	Success	Success

- 2) If you would like to view the history of a certain payment type, select the payment type from the top drop-down menu. You can also select a date range to find specific payments.
 - If you need to view items beyond the 30 or 90-day date ranges, select “Custom Date” from the drop-down menu and select your start and end date.



- 3) If you'd like to download a PDF or Excel version of your payment history report, click



- 4) Once you have chosen the PDF or Excel option, you can opt to have the report sent to your email address on file or you can download the report to your computer.

Reports

Viewing reports as a parent has never been easier. You can view your meal, fee, and fund account activity reports, depending on what your district offers. In addition, the format of the reports now matches exactly what is displayed on the administrative site, so you and your school staff will always be on the same page.

- 1) You can view your reports by opening the Menu and clicking the Reports option.

The screenshot displays the 'Reports' interface. It features two main sections: 'Meal Report' and 'Fund Account Report'. Each section contains a form with three dropdown menus: 'Select Report Type *', 'Select Student / Staff *', and 'Date *'. The 'Meal Report' section is currently set to 'Meal Account Report', a blurred student/staff ID, and '30 days'. Below these fields are two orange buttons: 'CREATE PDF REPORT' and 'CREATE EXCEL REPORT'. The 'Fund Account Report' section is currently set to 'After School Program', a blurred student/staff ID, and '30 days'. It also has two orange buttons: 'CREATE PDF REPORT' and 'CREATE EXCEL REPORT'. At the bottom of the 'Fund Account Report' section, there is a link labeled 'Return To Dashboard'.

- 2) The Reports Screen offers Meal Reports as well as Fund Reports:

Meal Activity Report - allows you to see what your student is purchasing.

Meal Account Report - allows you to see a student or staff's lunch payment and purchase history.

Fund Account Report - allows you to see your payment history and use of funds over time.

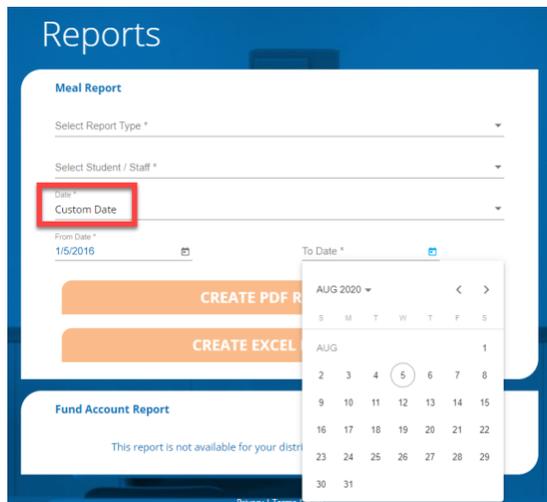
3) For any report you need, select the student or staff as well as a date range before clicking

CREATE PDF REPORT

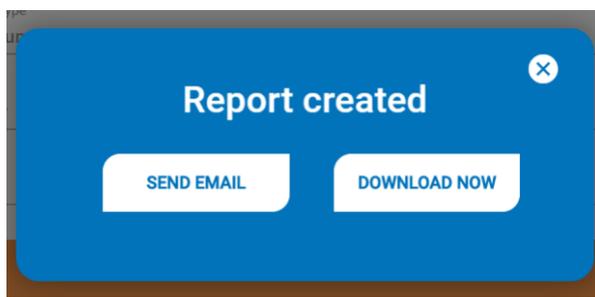
or

CREATE EXCEL REPORT

- If you need to view items beyond the 30 or 90-day date ranges, select “Custom Date” from the drop-down menu and select your start and end date.



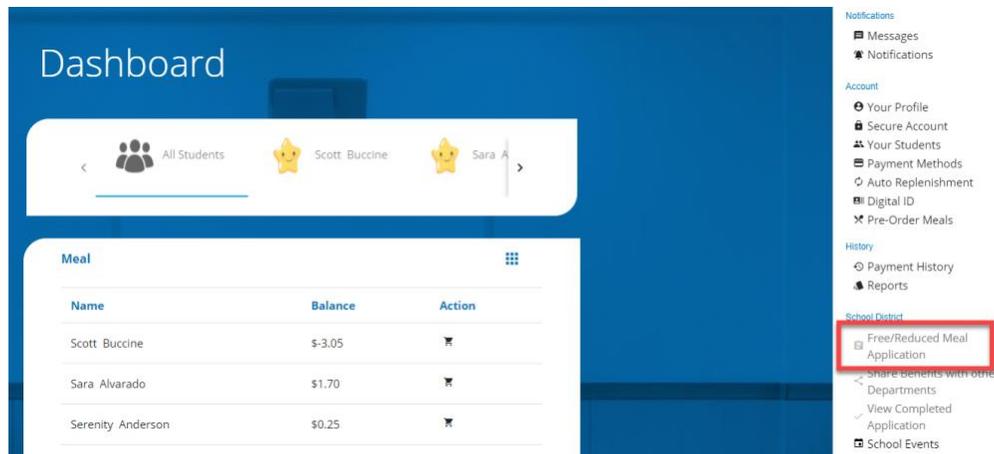
4) From there, you have the option to send the report to the email address associated with your account or simply download the report to your computer.



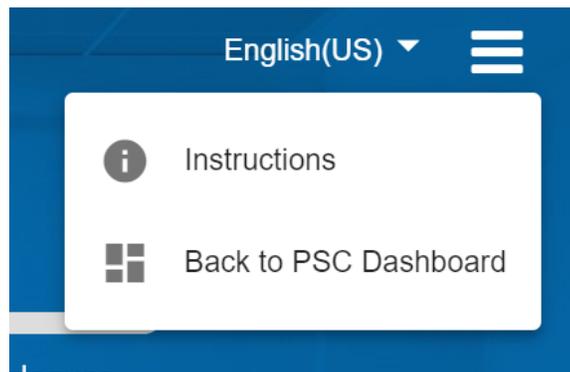
Free and Reduced Meal Applications

Start Your Application

- 1) Once you have your PaySchools Central account set up, you can begin your application.
- 2) To access the application, open the Menu and select the Free/Reduced Meal Application option.



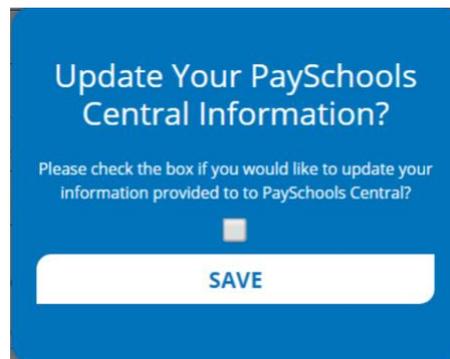
- 3) Instructions regarding how to complete an application can be accessed from the QuikApps Menu at any time.



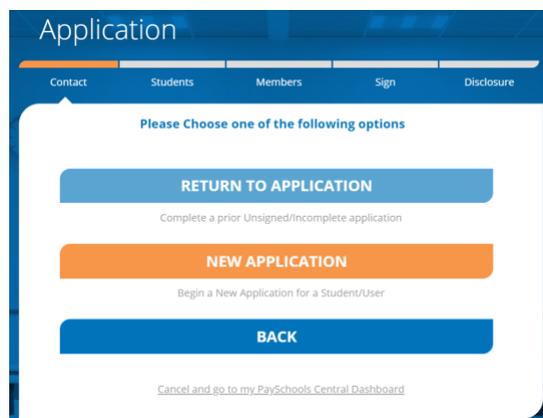
- 4) Contact information is shown pre-filled with the profile information on your PaySchools Central account.
- 5) You can verify or alter the information for your application specifically if any changes are needed.

- 6) Select your preferred contact method: email or mail. This will be used if your district requires your application to be reviewed. In that case, the district will use this contact method to send your determination letter.
- 7) Press Continue to go to the next step.
- 8) If changes were made to the contact details, you may choose to update PaySchools Central contact details as well.

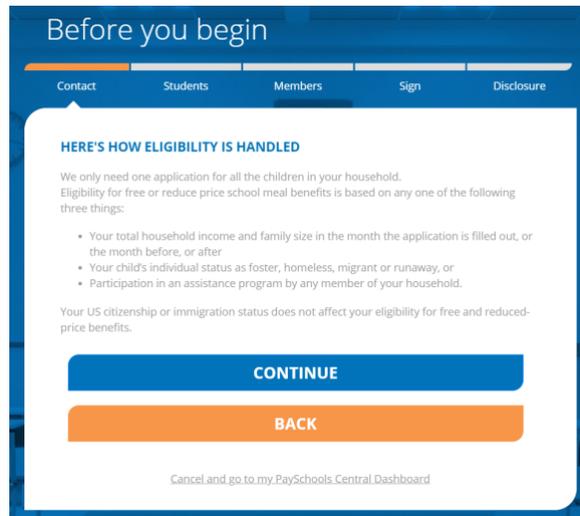
Note: You can NOT update your email address, as this is also your login ID. If you wish to change your email address, please return to PaySchools Central using the option Cancel and Go to my PaySchools Central Dashboard → Menu → Your Profile feature.



- 9) Choose your application type:
 - a) Choose Return to Application to continue an application that you started but had not completed. This option will ONLY show if you have already started an application.
 - b) Choose New Application to begin an application for this school year.



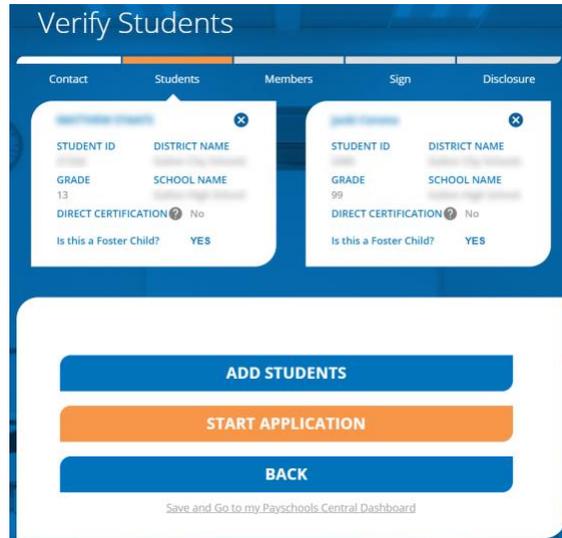
- 10) Before you begin, read messages from your school and instructions on how income should be entered.
- a) If your school district does NOT have a message, you will ONLY see the “Here’s how eligibility is handled” only.



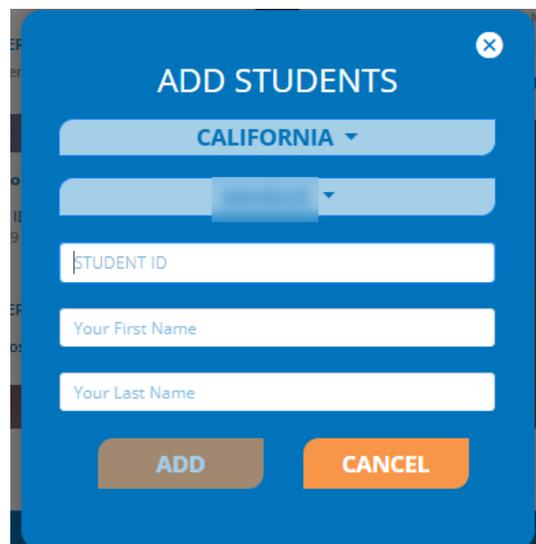
- 11) Here’s How Eligibility Is Handled: Instructions for how to complete an application and the details that will be need such as income types.
- 12) Continue to the next step:
- a) Select Continue to go to the next step. Press Back to return to the last step. Use the Cancel and Go to my PaySchools Central Dashboard link to leave the application and return to PaySchools Central.

Add\Verify Students

- 1) Verify Students: Students from last year's application and PaySchools Central will be listed.



- 2) Data regarding your student will be shown, including student ID, district name, grade, and school name. In addition, if your student is already directly certified from an outside government program such as SNAP, TANF, FDPIR, this will be identified in this section. This is done directly from the State program to your school district and there is nothing needed on your side.
- 3) You can remove students with the X icon in the top right corner of each student box.
- 4) Click Add Students if you need to add additional students.

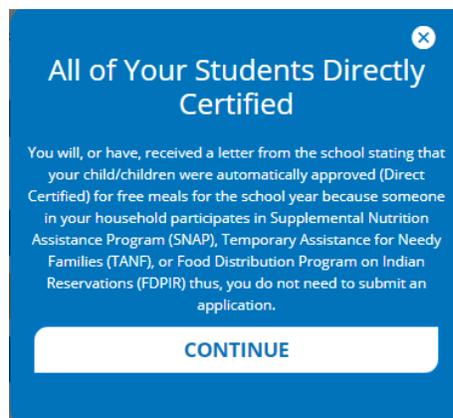


- 5) Select “is this a Foster Child?” for any students in your household who are fostered in your household. You will not enter any income or additional details for the student, but they will be part of your family count and will affect your determination.



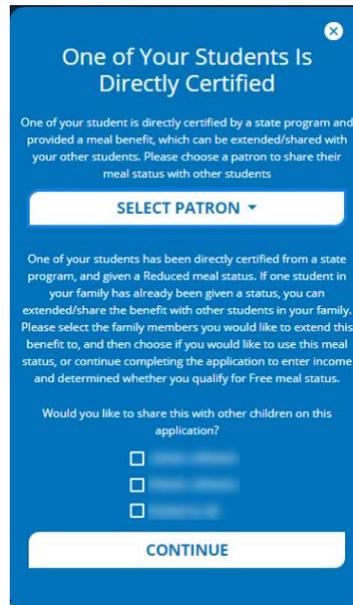
The screenshot shows a form with the following fields: STUDENT ID, DISTRICT NAME, GRADE (with the value '6'), and SCHOOL NAME. Below these is a 'DIRECT CERTIFICATION' section with a question mark icon and the text 'No'. At the bottom, there is a red-bordered box containing the question 'Is this a Foster Child?' followed by an unchecked checkbox and the word 'YES'.

- 6) Continue to the next step by selecting Continue or click Back to return to the last step.
- 7) Use the Save and Go to my PaySchools Central Dashboard link to save the application and return to PaySchools Central.
- 8) Directly Certified Students:
- a. If all your students are directly certified by the state, you will be informed and directed to the disclosure options to allow or prohibit sharing of your meal status for other departments. Disclosing this information can reduce the amount of money owed on school fees.



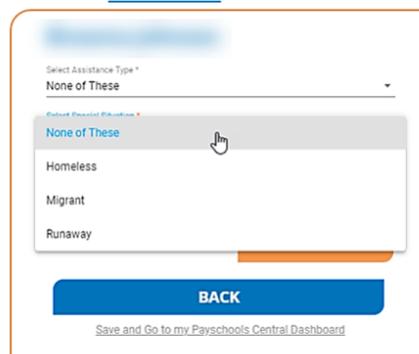
- b. If some, but not all of your students are directly certified:
- i. You can extend that benefit to the other children on your application either individually or by using the Extend To ALL option to select all students currently on your application.

- ii. If you extend benefits to ALL students on your application, you will also be redirected to the disclosure options to allow or disallow sharing of your meal status for other departments which can reduce the amount owed on school fees if your schools allow.



Note: Foster students will NOT be on this list, as they are verified by the state in a different manner than direct certification.

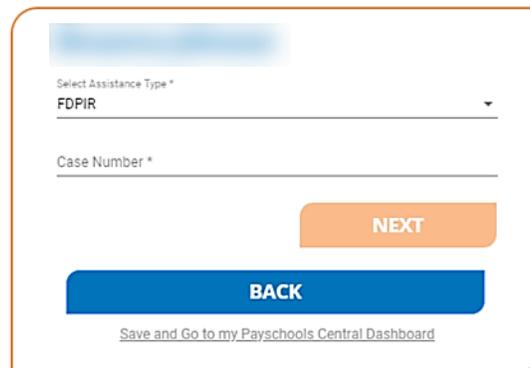
- 9) Student Assistance: If your student is NOT directly certified, you will need to enter assistance details or income.
- 10) If they are NOT part of a state assistance program, choose “None of These.”
 - a) Choose whether they are a Special Situation. If they have a Special situation, choose the option from the dropdown: homeless, migrant, or runaway.



11) If they ARE part of a state assistance program, choose the option from the dropdown (TANF, SNAP, FDPIR).

a) Enter their case number provided by the state.

- Select Next to go to the next step or click Back to return to the last step.



The screenshot shows a web form with the following elements:

- A dropdown menu labeled "Select Assistance Type *" with "FDPIR" selected.
- A text input field labeled "Case Number *".
- An orange button labeled "NEXT".
- A blue button labeled "BACK".
- A link at the bottom: [Save and Go to my Payschools Central Dashboard](#).

12) If the *student* has income, select the income box to display the income fields.

Breanna Johnson James Johnson Steven Johnson

Select Assistance Type *
None of These

Select Special Situation *
None of These

Does Breanna have income? Please select the checkbox to enter income details.

Income from Work (gross income)
\$ Income * Select Frequency *

Welfare/Child Support/Alimony(gross income)
\$ Income * Select Frequency *

Pension, Retirement, SSI, VA, SS(gross income)
\$ Income * Select Frequency *

Other Income (PFD) (gross income)
\$ Income * Select Frequency *

NEXT

BACK

[Save and Go to my Payscale Central Dashboard](#)

13) Enter income from work, welfare/child support/alimony gross), and the frequency of the income from the drop-down.

14) Enter income from pension retirement, SSI, VA, SS (after taxes).

15) Enter other income that was NOT entered from the above such as PFD in Alaska (after taxes).

16) You **MUST** complete the amount field for each income type you select in order for the Next button to be enabled.

17) Continue to the next step by clicking Next.

Add\Verify Members

1) Verify and Add Members: Please read the information on what is considered to be a member.

Verify Members

Contact Students **Members** Sign Disclosure

You have been added automatically as a member to this application, but there may be additional members in your household. Please remove or add members to this application based on the following definition:

A member is defined as:

- Students that are in grade 12 or below and attend school in another school district
- Children that attend all day care or pre-school, or are not of school age, including infants
- Anyone 18 years of age or younger living in your household that does not currently attend school
- Grandparents or other extended family members that are living with you
- Also include people that are not currently living with you, but are only away on a temporary basis, like:
- Kids that are away at college
- Members of your family that are in the military, and are deployed

Include people regardless of age or whether they earn or receive income.

ADD MEMBER

CONTINUE

BACK

[Save and Go to my Payschools Central Dashboard](#)

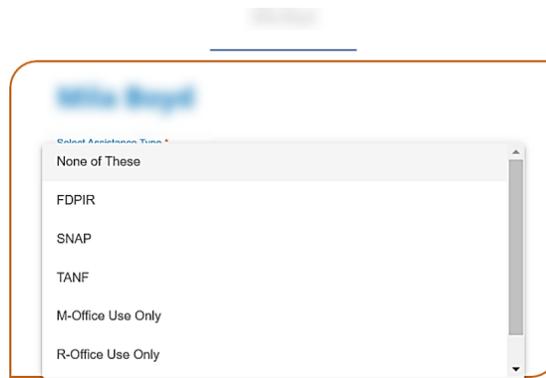
2) You will automatically be added to the application as a member.

a) Members from last year's application will automatically be added.

i. Remove members if they are no longer in your household.

ii. Add all members to your member list using the Add Member button.

- b) Continue to the next step by selecting the Continue button or press the Back button to return to the last step or use the Save and Go to my PaySchools Central Dashboard link to save the application and return to PaySchools Central.
- 3) Member Assistance: You will also need to enter assistance details or income for members of your household.
- a) If they **NOT** part of a state assistance program, choose “None of These” from the dropdown options and to move on to the income section.
 - b) If they **ARE** part of a state assistance program, choose the option from the dropdown: TANF, SNAP, or FDPIR.



- c) You will then be prompted to enter your student’s case number provided by the state.
- d) If they are **NOT** part of a state assistance program and have income, enter income amounts and the frequency: weekly, every two weeks, monthly, or annually if that option is available for your district.
- e) Check the income box and enter the **member’s** Income.
 - i) Enter income from work, welfare/child support/alimony (gross), and the frequency of the income from the dropdown.
 - ii) Enter income from pension retirement, SSI, VA, SS (gross).
 - iii) Enter other income that was **NOT** entered from the above such as PFD in Alaska (gross).
- f) You **MUST** complete the amount field for each income type you select or the Continue button will not be enabled.

g) Continue to the next step by selecting the Continue button or press the Back button to return to the last step. Click the Save and Go to my PaySchools Central Dashboard link to save the application and return to PaySchools Central.

4) Statements:

a) Read the Use of Information and USDA Non-Discrimination statements.

b) Continue to the next step by selecting the Continue button or press the Back button to return to the last step. Click the Save and Go to my PaySchools Central Dashboard link to save the application and return to PaySchools Central.

Review and Sign Application

1) Summary and Review:

Summary and Review

Contact Students Members Sign Disclosure

YOUR APPLICATION IS ALMOST COMPLETE!

Please confirm the details below. Use the Edit links below to make changes, once done you will return to this screen, or you can use the Continue button to move to the final steps.

MEMBERS

EDIT

STUDENTS

EDIT

EDIT

I Certify (promise) that all information on this application is true and that all income is reported. I understand that this information is given in connection with the receipt of Federal Funds, and that school officials may verify (check) the information. I am aware that if I purposefully give false information, that my children may lose meal benefits. Deliberate misrepresentation of information may subject applicants to prosecution under applicable State and Federal law.

I Agree

CONTINUE

BACK

Save and Go to my Payschools Central Dashboard

a) Review all member and student details:

i. Ensure all income and assistance types have been entered.

- ii. If any details were missed or need to be changed, click on the **Edit** link to be directed to the student or member assistance screen to make changes. Once done, you will be redirected to this page to review again or can use the buttons at the bottom to navigate through the application again.

 - b) Read the “I certify” message and agree that all information provided is correct.

 - c) Continue to the next step.
- 2) Sign your application and give demographic data.
- a) Demographics data is optional and may or may not be displayed based on your school districts state requirements.

Disclosure Categories

Contact Students Members Sign Disclosure

SHARE MEAL BENEFIT WITH OTHER DEPARTMENTS

The information you give on the Confidential Application for Free or Reduced Price Meal is only used to determine your student(s) eligibility for Free or Reduced Price meals. The information may also be used to determine your student(s) eligibility to receive benefits for other programs. We must have your permission to share your information. Please read the description for each category carefully. Completing this form will not change whether your student(s) get free or reduced meals. Completing this waiver is NOT A REQUIREMENT for participation in any school nutrition program. Please choose the program(s) by selecting the check box by each program for the ones you wish to OPT IN and share your information with.

Are you willing to share your student's meal benefits with other departments in the district for a possible reduction in your fee costs? If so, the school has listed the different departments or areas you can choose below. Please check the box for which to share your meal benefit.

Check this box if you would like to share with ALL departments below

Fee Waiver

College Entrance Testing

Crawford City, Mentoring

APPLY TO ALL STUDENTS

Check this box if you would like to share with ALL departments below

Fee Waiver

College Entrance Testing

Crawford City, Mentoring

SIGNER:

ELECTRONIC SIGNATURE

I Certify (promise) that all information on this application is true and that all income is reported

CONFIRM PASSWORD *

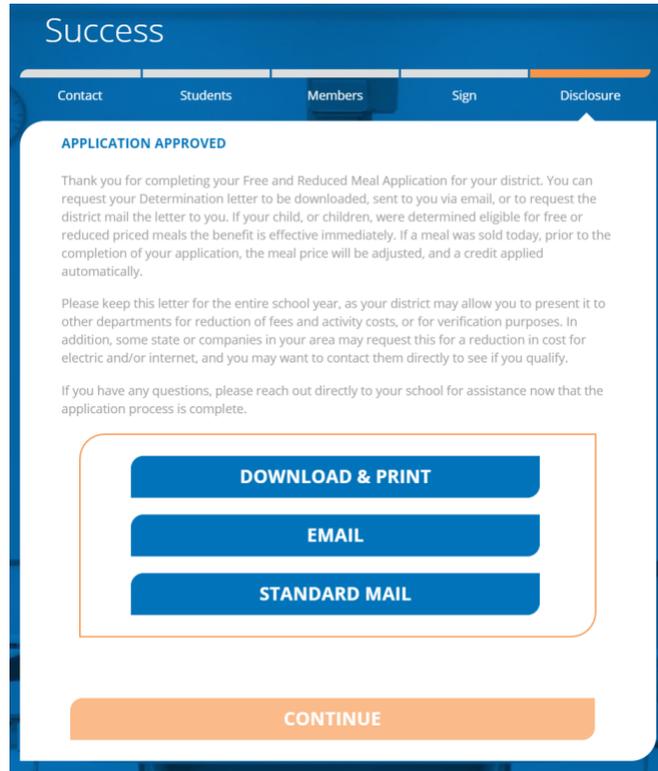
CONTINUE

SKIP SHARING

- i. Choose between 'Hispanic or Latino' or 'Not Hispanic or Latino.'
 - ii. Choose from other demographics for additional details.
 - b) Enter the last 4 digits of your Social Security Number (SSN) or select "No SSN\Not applicable" if you do not have a SSN.
 - c) Enter your PaySchools Central password.
 - d) Continue to the next step.
 - e) Select the **Sign** button to complete the application and go to the next step.
 - f) Click the **Back** button to return to the previous step.
- 3) If applicable and set up by your school, the next step is to complete disclosure choices. This option is to share your student's meal benefit with other departments your school has designated, which can reduce fee costs.
 - 4) Select the school departments to share the benefit with for each of your students individually or select the Check this box if you would like to share with ALL department's checkbox for each of your students
 - 5) Enter your PaySchools Central Password.
 - 6) Continue to the next step by selecting the **Sign** button sign the application and to go to the next step or press the **Back** button to return to the last step.

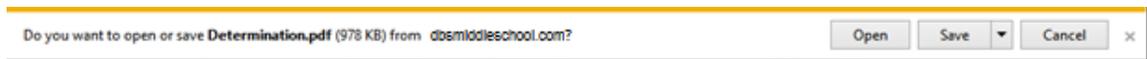
Get Determination Letter

- 1) Get your determination letter.
 - a. If your school automatically approves applications:



- i. Get your application via three options (note that you can do all three options if you choose):

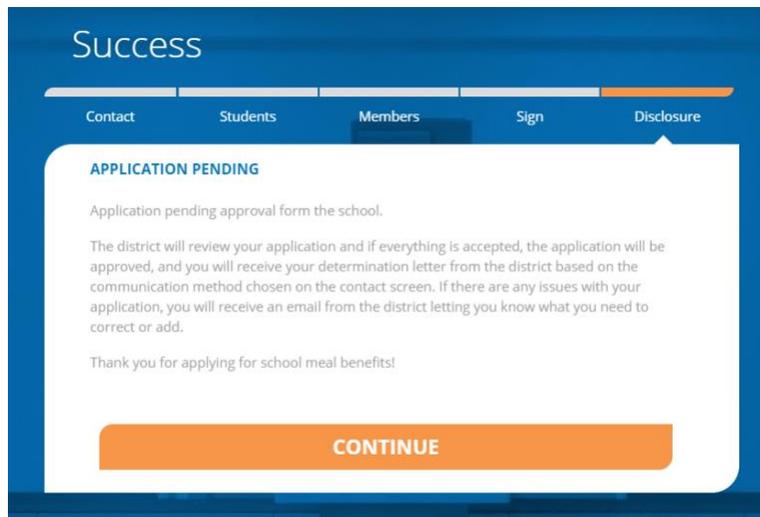
1. Download and print: download your determination letter immediately.



2. Email: send the determination letter to your email in PDF
 3. Standard Mail: you can choose to have the determination letter sent to you from the school district via mail. Please note this will take time for the district to print and mail to you and is NOT the preferred method of delivery.

- ii. If your school does NOT automatically approve applications:

1. You will be notified that the application is pending approval and your preferred contact method will be used to send your letter once approved.
2. If changes are needed for your application to be approved, an email will be sent and a screen pop-up in PaySchools Central will be shown.
3. In both cases, you will be instructed to return to your application to make changes and resubmit.



- 2) Continue to the next step by clicking [Continue](#).

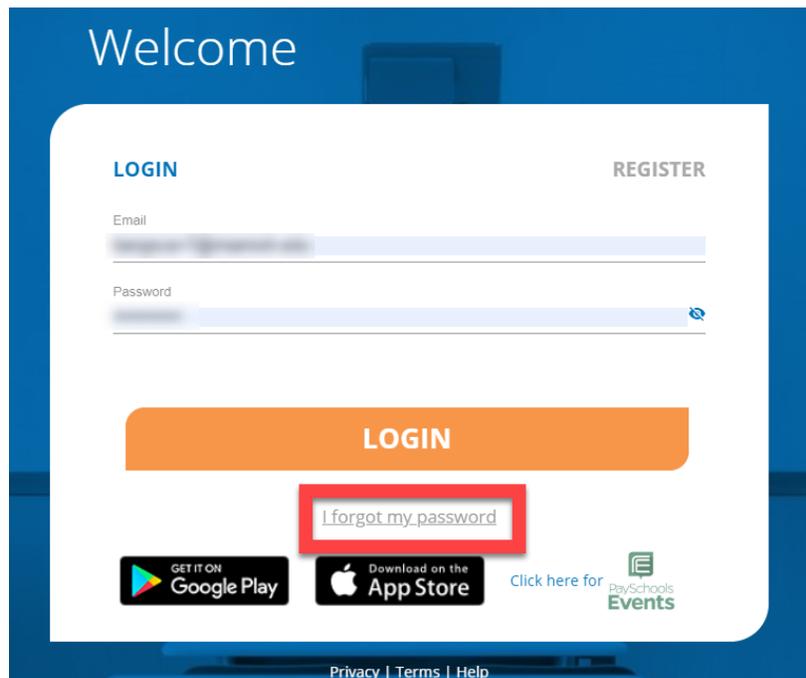
Review Completed Applications

- 1) You can view the current application from the [View Completed Application](#) option in the Menu:

Reset Your Password

If you ever have trouble logging in, you can follow some simple steps to reset your password. You can also use this feature to change your password whenever you want.

- 1) If you cannot log into PaySchools Central, click [I forgot my password](#) on the login screen and follow the steps to reset your password.
- 2) If you are already logged in and would like to change your password, you need to log out and click [I forgot my password](#) in order to create a new one.



- 3) Enter in the email address associated with your account where indicated and click



Reset Your Password

Email *

How would you like to reset your password?

EMAIL ME

TEXT/CALL

[I already have a text code](#)

[Return To Login](#)

Email

- 1) The **EMAIL ME** option will send you an email with a reset password link. Click the link and follow the instructions to reset your password when you reach the Account Activation page.
- 2) Click **CONFIRM** to submit your changes.

Account Activation

Please enter your email address and password to activate your account.

Email *

Password *

Confirm Password *

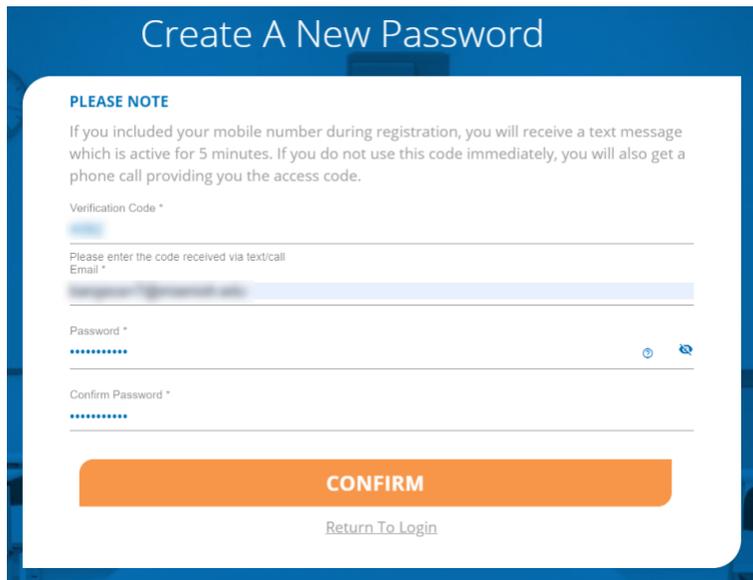
CONFIRM

[Return To Login](#) [Clear All](#)

Text

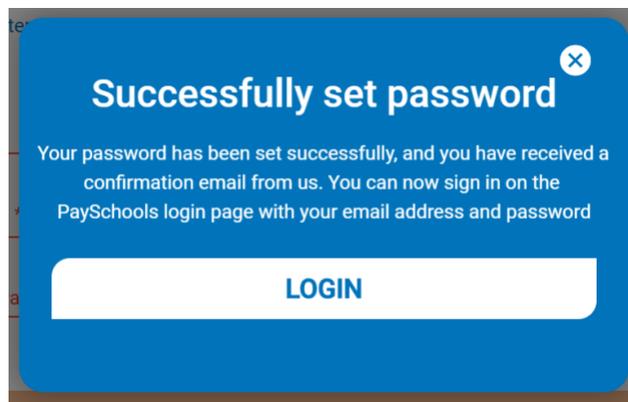
- 1) The **TEXT/CALL** option will send you a text verification code, which you'll need to enter on the following page:

If you do not enter in the verification code within 5 minutes, you will receive an automated phone call from an unknown number, which will also give you the verification code.



The screenshot shows a web form titled "Create A New Password". At the top, there is a "PLEASE NOTE" section with the following text: "If you included your mobile number during registration, you will receive a text message which is active for 5 minutes. If you do not use this code immediately, you will also get a phone call providing you the access code." Below this note are four input fields: "Verification Code *", "Please enter the code received via text/call Email *", "Password *", and "Confirm Password *". Each field has a corresponding input area with a blue highlight. At the bottom of the form is a large orange button labeled "CONFIRM" and a smaller link labeled "Return To Login".

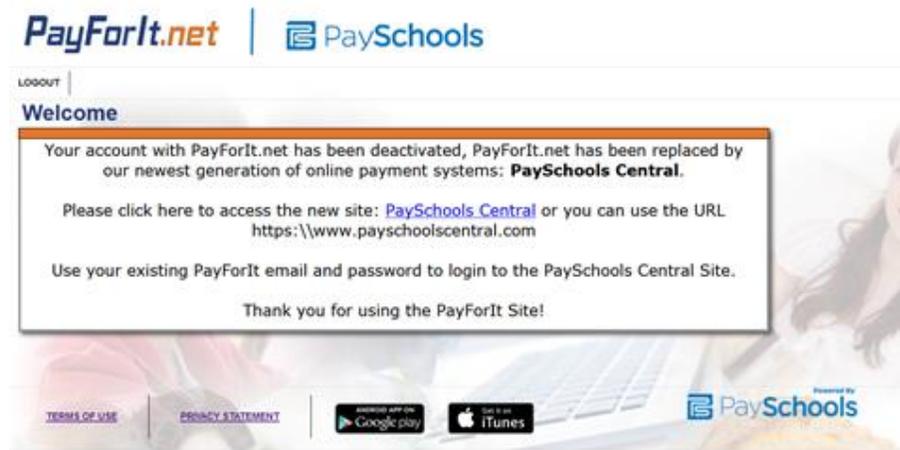
- 4) For either the email or text/call option, click **CONFIRM** to submit your changes. You will see the following pop-up, which indicates you successfully created a new password.



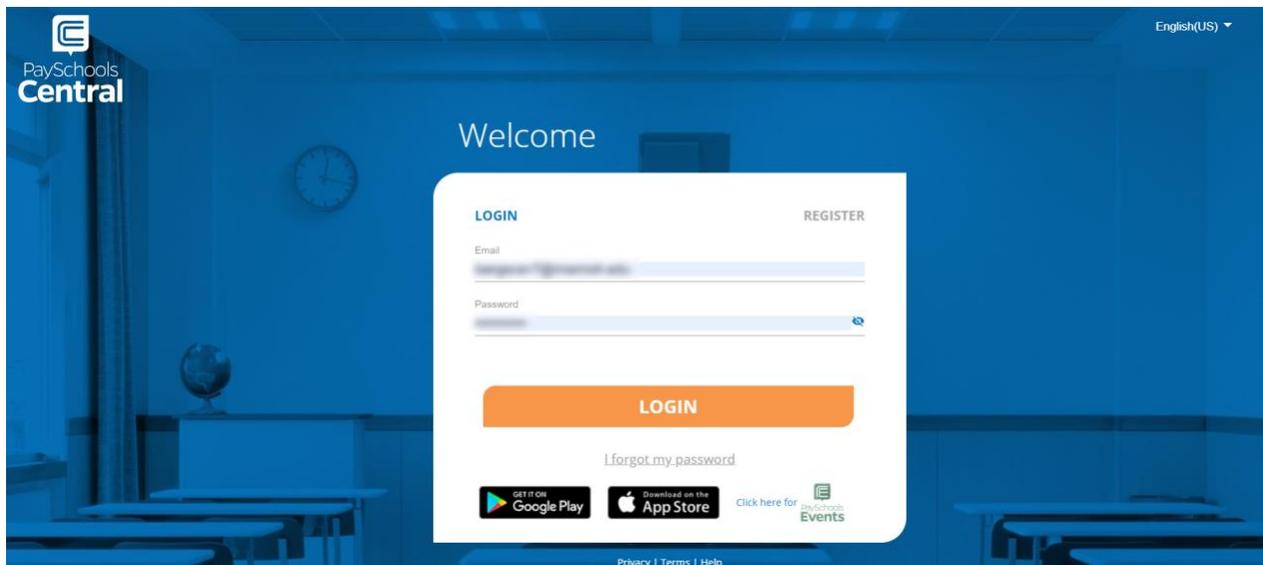
Former PFI Users

If you were previously a PayForIt user, meaning your account was in PayForIt.net, your account has been migrated over to www.PaySchoolsCentral.com!

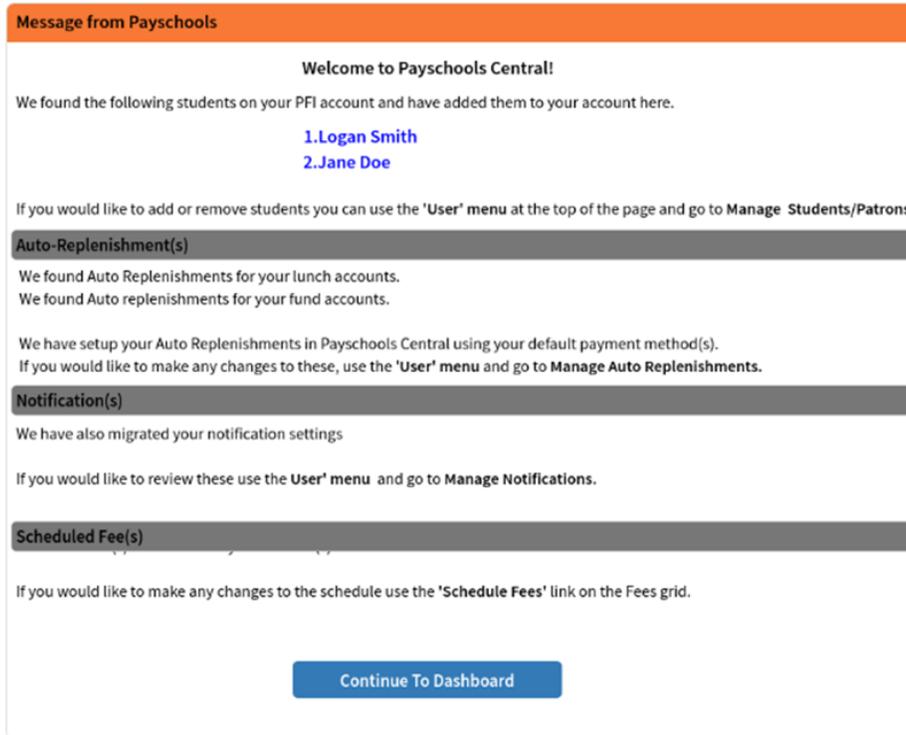
- 1) You must first log into your PayForIt account in order to properly migrate your information over to PaySchools Central. Upon logging in, you will see the following message:



- 2) Click on the [PaySchools Central](http://www.payschoolscentral.com) link to complete the migration. A new tab will open on www.payschoolscentral.com. Enter your PayForIt credentials and click



- 3) The following pop-up will display upon login. Confirm your information and click . When you sign in with your credentials, any information that was migrated will be displayed in the message below.



Message from Payschools

Welcome to Payschools Central!

We found the following students on your PFI account and have added them to your account here.

- 1. [Logan Smith](#)
- 2. [Jane Doe](#)

If you would like to add or remove students you can use the 'User' menu at the top of the page and go to **Manage Students/Patrons**.

Auto-Replenishment(s)

We found Auto Replenishments for your lunch accounts.
We found Auto replenishments for your fund accounts.

We have setup your Auto Replenishments in Payschools Central using your default payment method(s).
If you would like to make any changes to these, use the 'User' menu and go to **Manage Auto Replenishments**.

Notification(s)

We have also migrated your notification settings

If you would like to review these use the **User' menu** and go to **Manage Notifications**.

Scheduled Fee(s)

If you would like to make any changes to the schedule use the '**Schedule Fees**' link on the Fees grid.

[Continue To Dashboard](#)

- 4) After step 3, refer to this user guide for help with taking full advantage of PaySchools Central's convenient features.