

Supporting your Payers

This guidance document will help you to support your payers in their use of the ParentPay system.

The document will also provide a reference point for you when payers have a query.

How Payers Activate their Account

Go to www.parentpay.com

- Type in the **username and password** received in the activation letter from school, be sure not to confuse the letter l (for lemon) with the number one (1) and the number 0 (zero) with the letter o (for orange). **NB these user details are for one-time use only and will become invalid after account activation**
- Follow the on-screen instructions to successfully activate the account. At this point the user will need to enter in their name, an email address and select a password for the account (their email address will become their username)
- Read the ParentPay terms and conditions and click in the box next to **Accept terms and conditions** at the bottom of the page and click **Continue**

A verification email will be sent to the user. They will need to click on the link within the email to activate and access their account.

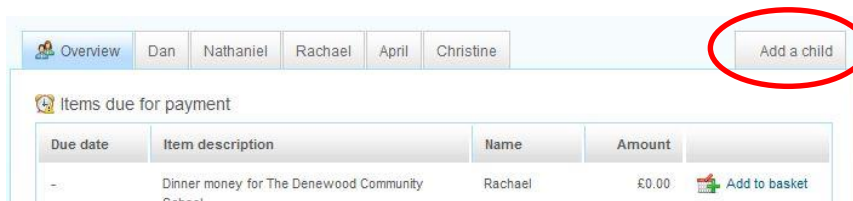
Cross-school login

One of the key features of ParentPay is "cross-school login" functionality, enabling payers with children at different schools to add up to six children to their account, regardless of which school their children attend. The schools must all subscribe to ParentPay for a payer to be able to merge their accounts for children at different schools.

Existing parent user – Add a child

The payer needs to choose one account to 'add' the other children to. The username and password for this account will become their 'main' account.

- Go to www.parentpay.com
- Login to the account they wish to have as their main login for all children/schools
- Click on the **Add a child** tab from their home page



- **Enter the username and password** for the child they wish to add.
- Click **Search**.

The school, pupil name, year group and class will show on screen.

Adding from account: r2etqluz (paris Foster)

School	Pupil	Year	Reg. group
Sunnyside School	Nathaniel Norman	1	1DC

Add child to your account **Cancel**

After you confirm the add, these pupils will be transferred to the account you are logged into and the old account will be disabled.

- Click **Add child to your account** to confirm this is the child they wish to add to their account

They can repeat the above process to add a maximum of six children to their account.

New parent user – Add a child

If the payer has more than one child at the same school, or children at different schools that use ParentPay, and have been provided with a username and password for the children they should choose one child's activation username and password to activate their account.

This account will then become their 'main' account (login) for all children.

Go to www.parentpay.com

- **Enter the username and password** they have received for one of their children in the Account login area
- Click **Activate**
- Click on the **Add a child** tab on their home page

Overview Dan Nathaniel Rachael April Christine **Add a child**

Items due for payment

Due date	Item description	Name	Amount	
-	Dinner money for The Denewood Community School	Rachael	£0.00	Add to basket
-	Dinner money for The Denewood Community School	April	£0.00	Add to basket

- **Enter the username and password** for the child they want to add
- Click **Search**
- The school, pupil name, year group and class will show on screen

Adding from account: r2etqluz (paris Foster)

School	Pupil	Year	Reg. group
Sunnyside School	Nathaniel Norman	1	1DC

Add child to your account **Cancel**

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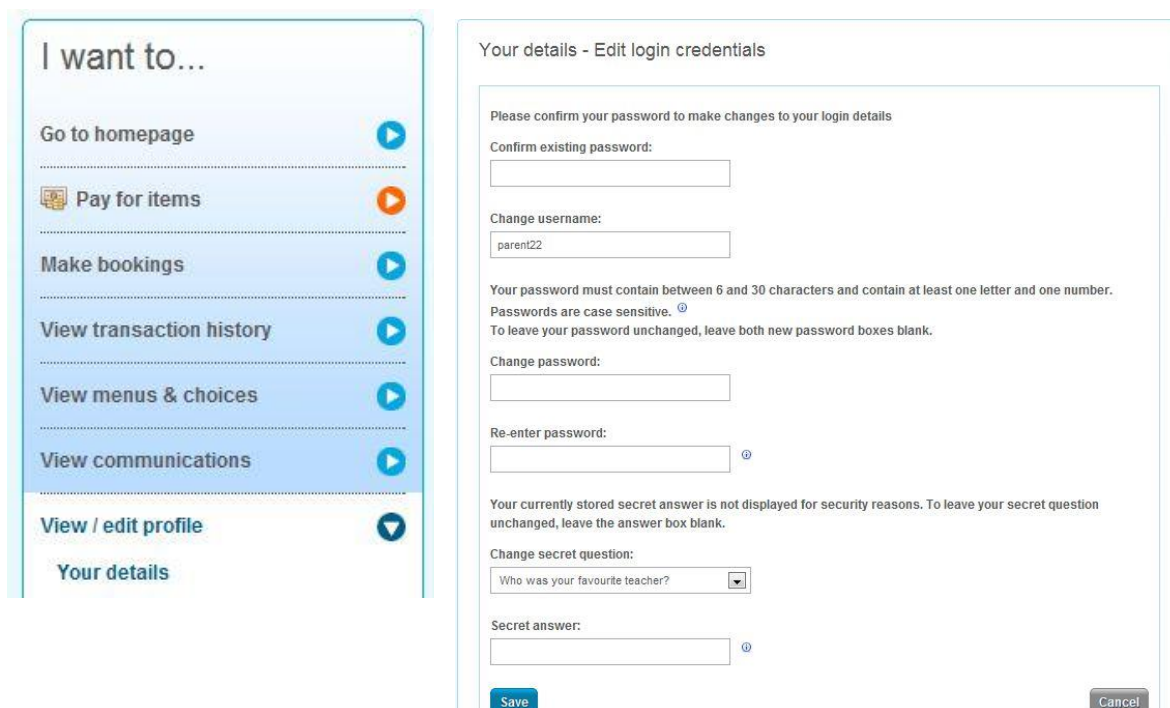
- Click **Add child to your account** to confirm this is the child they wish to add to their account

They can repeat the above process to add more children to their account up to a maximum of six.

Changing usernames and/or passwords

If at any time a payer wants to change their username or password they can do so as follows:

- Go to the '**I want to...**' area of their home page
- Select **View/edit profile > Your details**



The image shows two side-by-side screenshots from the ParentPay website. The left screenshot shows the 'I want to...' menu with options: 'Go to homepage', 'Pay for items', 'Make bookings', 'View transaction history', 'View menus & choices', 'View communications', 'View / edit profile', and 'Your details'. The 'View / edit profile' option is highlighted with a downward arrow. The right screenshot shows the 'Your details - Edit login credentials' form. It includes a password confirmation section, a username change section (with 'parent22' entered), a password change section (with instructions on password requirements), a re-enter password section, a secret question section (with 'Who was your favourite teacher?' selected), and a secret answer section. There are 'Save' and 'Cancel' buttons at the bottom.

First, they will need to confirm their existing password – then they can make any changes required and click **Save**.

Managing phone numbers and email addresses

When payers provide mobile telephone numbers within their ParentPay accounts this not only allows school/s to send them SMS text message communications, but also allows them to opt in to receiving our automated SMS text alerts for items such as a low dinner money balance for their child/children.

Automated text message alerts that they request are payable by them at 0.06p per message sent.

Text messages sent to a payer by the school, via the Communication Centre, are payable by the school and schools will be invoiced for their text message usage.

Entering mobile numbers and email addresses

If a payer wants to add or update their email or mobile telephone details they can do so as follows:

- Go to the '**I want to...**' area of their home page
- Select **View/edit profile > Phones & Emails**

The image shows two parts of the ParentPay interface. On the left is the 'I want to...' menu with options: Go to homepage, Pay for items, Make bookings, View transaction history, View menus & choices, View communications, View / edit profile (selected), Your details, and Phones & emails. On the right is the 'Phones & emails' page. It has a 'Phone number' section with a 'Phone:' label, 'Not supplied' text, and an 'Edit' button. Below is the 'Mobile numbers' section showing the 'Main mobile phone:' as '00000000000000 (Registered)' with a registered icon. It includes links: 'Add or edit mobile numbers', 'Click here if you have received a mobile registration PIN', and 'View a statement of your ParentPay text balance'. The 'Additional mobile numbers' section shows another '00000000000000 (Registered)' number with a 'Resend registration PIN' link. A note states: 'Only your main mobile number is used for your automated text alerts using alerts.' At the bottom, it says: 'All mobile numbers are visible to the school manager. They may send you texts using the ParentPay Communication Centre™.'

When they provide their mobile number payers will automatically receive a registration PIN in order to register the mobile – If they do not register their mobile they will be unable to receive automated SMS text alerts from ParentPay.

Payers do not need to have registered their mobile number in order for the school to send them SMS text messages.

Three easy steps to enable automated SMS text alerts:

Step 1: Registering your mobile number

If payers wish to subscribe to our automated SMS text alerts, and have received their registration PIN, they must log back into their ParentPay account, go to the '**I want to...**' area **View/edit profile > Phones & emails** and click on the [Click here if you have received a mobile registration PIN](#) link to register their mobile. The registration PIN is valid for 7 days.

Step 2: Top up your SMS text balance

Automated SMS text alerts are paid for by the account holder at a charge of 0.06p per message sent – payers must ensure that they have a SMS text balance of at least £2.40.

Topping up is easy, they simply go to **Pay for items** via the '**I want to...**' area of their home page and click on the '**Other**' tab.

I want to...

- Go to homepage
- Pay for items**
- Make bookings
- View transaction history
- View menus & choices
- View communications
- View / edit profile
- View school & caterer

Pay for items

Click Add to basket to select items from the list below.

All items
Adam
Winston
Other

Item description	Amount	
SMS Text Alerts Buy SMS Text Credits to receive mobile alerts from ParentPay. Credits cost 6p each, minimum top-up £2.40. Tick the consent box to confirm you've read the SMS Terms and Conditions	-	Add to basket
Provided by: ParentPay Limited Balance: £0.00 Edit amount or add notes		

Checkout

Step 3: Choosing the alerts you want to receive

Go to the **'I want to...'** area of the home page **View/edit profile > Alert settings**. Choose which alerts to receive and set the threshold (balance) at which they wish to receive alerts.

I want to...

- Go to homepage
- Pay for items
- Make bookings
- View transaction history
- View menus & choices
- View communications
- View / edit profile**
 - Your details
 - Phones & emails
 - Child details
 - Child contacts
 - Add a child to your account
 - Alert settings**
 - Stored cards
- View school & caterer

ParentPay support

- Take the tour
- What's new?
- Search help topics
- Parent FAQs

Alert settings

Receive automated alerts from your account by email and SMS text message. Balance alerts are not available in all schools.

Balance alerts are available in all of your schools

Top up your ParentPay Text Balance via Pay for items to receive automated text alerts. You can still save your alert settings, but no automated text alerts will be sent until your account is credited.

The school may still send you texts using the ParentPay Communication Centre™.

- [Register your emails and mobile phones](#)
- [SMS Terms and Conditions](#)
- [Parents guide - Text alerts and school communication](#)

Balance alerts
Max. every 2 days, when account balance reaches the level set by you.

New item alerts
Max. once a day, when school creates a new payment item for your children.

Payment alerts
When school receives a cheque, cash or PayPoint payment for your child.

Message alerts
Sent as a text, to inform you when your school sends you an email through the ParentPay Communication Centre™.

Balance alerts

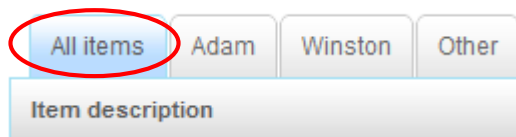
Service	Child	Threshold	Email alert	Text alert
School Meals for Oceania Primary School	Winston	£4.00	☒	☒
Dinner Money for Utopia Test Site	Adam	£4.00	☒	☒

New item alerts

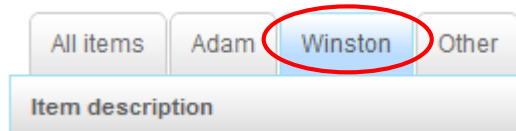
Child	Email alert	Text alert
Winston	☒	☒

Viewing and Paying for Items

Payers are able to view all items available for payment via the **All items** tab. If they have added additional children the items for payment for all children will show on this page.



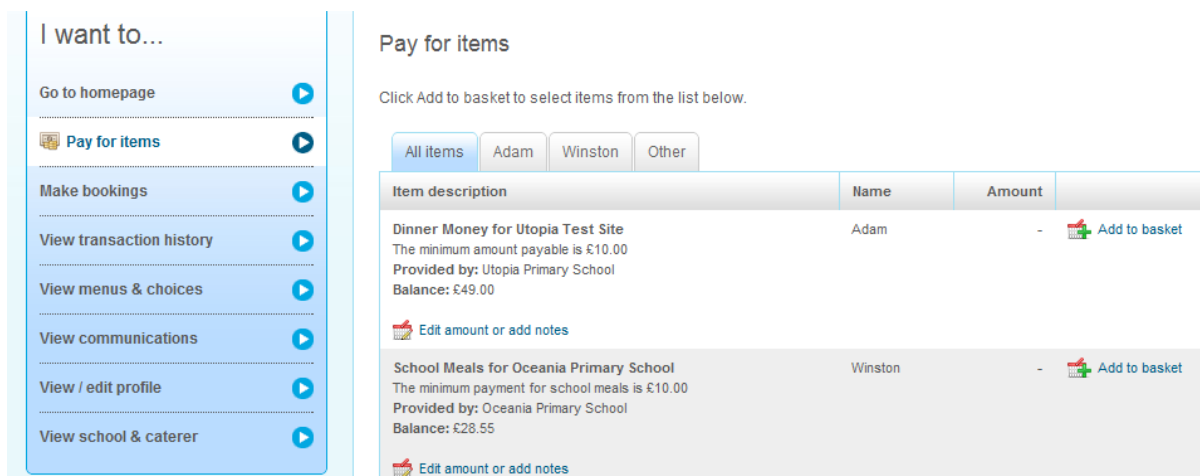
Payers can click on the named tabs if they only want to view payment items for an individual child.



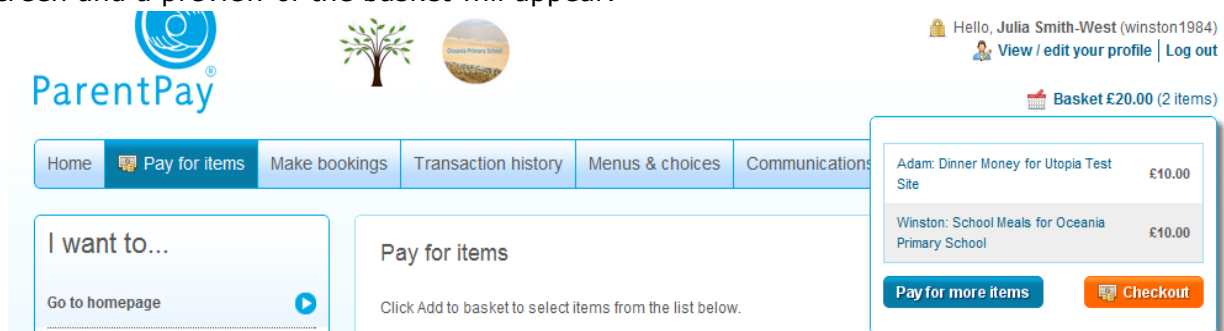
Payers need to go to **Pay for items** within the '**I want to...**' area on the left of the screen.

The screen will default to the '**All items**' tab displaying each item available by child with a full Description of the item, Due date and Amount. If payers want to only see items for an individual child they will need to select the relevant tab.

- Click on **Edit amount or add notes** or select to **Add to basket**.



Each time a payer adds an item to their basket they will be directed to the top right of the screen and a preview of the basket will appear.



Once ready to make payment a payer goes to their basket and clicks **Checkout**.

View payments made between specific dates

A payer has full access to information relating to any transactions/payments they have made.

Go to **View transaction history** in the '**I want to...**' area on the left of their screen.

- **Name:** choose the child to view payments for or leave as All
- **Payment item:** narrow the report down to a specific payment item if required
- **Start date:** Enter start date (DD/MM/YYYY) or use the pop-up calendar
- **End date:** Enter start date (DD/MM/YYYY) or use the pop-up calendar
- Click **Search**.

Payments

Please select the child, item(s) paid for and dates you would like to search.

Name:

Adam

Payment item:

All services

Start date:

01/01/2015

End date:

01/02/2015

Search

A comprehensive list of all payments they have made and any refunds the school may have made to them will show on screen.

Processed payments

Selected period: 01 Jan 2015 - 01 Feb 2015

Number of records: 8

Total: £310.00

Child	Payment item	Payment method	£ Amount	Date paid	Paid to	Notes
Adam	Dinner Money for Utopia Test Site	ParentPay online Deana Card x1111	10.00	28 Jan 2015	Utopia Primary School	
Adam	School Jumper	ParentPay online Deana Card x1111	30.00	19 Jan 2015	Utopia Primary School	Size Medium please

View statement of transactions for a selected month

Account statements enable a payer to run a report by month on items where there may be 'transactions/deductions' displayed against the payments they have made such as for a school meal account.

Go to **View transaction history > Account statements** in the '**I want to...**' area on the left of the screen.

- **Name:** choose the child to view payments for or leave as All
- **Account:** narrow the report down to the item paid for or leave as All
- **Statement month:** select the month and year using the drop down menus
- Click **Search**.

Account statements

Name:

Winston

Account:

Oceania Primary School:School Meals for Oceania Primary School

Statement month:

September

2013

Search

Statement

Total paid in during period: £42.00

Total paid out during period: £12.00

Service provider: Oceania Primary School

Date	Description	Paid out	Paid in	£ Balance
01 Sep 2013	Opening balance			2.55
09 Sep 2013	Update: Lunch time:Pupil Paid Meal from 09 Sep 2013 charged	2.00	0.00	0.55
10 Sep 2013	Update: Lunch time:Pupil Paid Meal from 10 Sep 2013 charged	2.00	0.00	-1.45
11 Sep 2013	Update: Lunch time:Pupil Paid Meal from 11 Sep 2013 charged	2.00	0.00	-3.45
12 Sep 2013	Update: Lunch time:Pupil Paid Meal from 12 Sep 2013 charged	2.00	0.00	-5.45
13 Sep 2013	Update: Lunch time:Pupil Paid Meal from 13 Sep 2013 charged	2.00	0.00	-7.45
18 Sep 2013	ParentPay	0.00	20.00	12.55
25 Sep 2013	Update: Lunch time:Pupil Paid Meal from 25 Sep 2013 charged	2.00	0.00	10.55
25 Sep 2013	Update: Attendance cancellation	0.00	2.00	12.55
25 Sep 2013	ParentPay	0.00	20.00	32.55
30 Sep 2013	Closing balance			£32.55

Alerts and communications

Payers are able to view a history of all automated alerts, messages sent to them by the school(s) and any messages they have sent to school via ParentPay.

Go to **View communications > Communication history** in the '**I want to...**' area on the left of the screen.

There is the option to **Show all** or select **Only messages from schools** or **Only messages to schools**.

The screenshot shows the 'I want to...' sidebar on the left with options like 'Go to homepage', 'Pay for items', 'Make bookings', 'View transaction history', 'View menus & choices', 'View communications' (selected), 'Communication history', 'Contact schools', and 'View / edit profile'. The main area is titled 'Communication history' and contains a table of alerts and communications from the last 90 days. A 'Change alert settings' button is in the top right. Below the table, there is a filter section with 'Show all' and a 'Go' button.

Date	Type	Subject
29 Jul 2015		Sent message - Request a refund Hello Oceania School Office. Winston has broken his leg and will no longer be able to attend the Trip to the Zoo next week. Is there any possibility of me receiving a refund for the trip. Thank you Mrs Smith
28 Jul 2015		Below £4.00 -- Winston School Meals f
26 Jul 2015		Letter

Sending a message to the school

If the school has opted in to the send message feature parents are able to make contact directly via their ParentPay login. The send message feature is intended as a general communication tool, in the event that parents need to contact school urgently, or relay important information pertaining to their child, they are advised to contact the school directly.

To send a message to the school payers need to Go to **View communications > Contact schools** within the '**I want to...**' area on the left of their screen.

If the school has opted out of the send message facility the payer will be informed.

The screenshot shows a message box for 'Winston' with the following text: 'Your school has opted out of this ParentPay feature. Please contact your school in the usual way e.g. by telephone or email.'

- **Name:** select the child the message is in relation to
- **Message category:** use the drop down menu to select
- **Enter message:** free type their message in the text box
- Click **Send message**

⚠ **IMPORTANT:** Please note that this message is sent directly to your child's school not to ParentPay.
Do not send a message here if it contains important information that could affect your child's well being. Please contact the school directly.

The screenshot shows a messaging form within a light blue border. At the top, there is a warning icon and text. Below this, the form has three main sections: a 'Name:' dropdown menu with 'Adam' selected, a 'Message category:' dropdown menu with 'Question about payment item' selected, and an 'Enter message:' text area containing the placeholder text 'Payer will enter message to the school here!'. At the bottom left of the form is a blue 'Send message' button.

The message will be sent to the school's ParentPay system and the school will receive an update via their Notifications informing them that they have a message from a parent.

Making bookings or meal selections

If the school is using our 'bookings/selections' module, payers may be able to pre-book meals, or sessions, for certain types of payment items such as school meals and before/after school clubs.

Payers will need to the **Make bookings** option within the '**I want to...**' area to the left of the screen.

- **Name:** select the child to make a booking for
- **Booking type:** select when the event is Lunch time, Breakfast etc.
- **Week commencing:** use the drop down menu to select the week to make bookings for
- Click **Make selections**

The screenshot shows two side-by-side panels. The left panel, titled 'I want to...', contains a list of navigation options: 'Go to homepage', 'Pay for items', 'Make bookings' (highlighted with a blue bar and a play button icon), 'View transaction history', 'View menus & choices', 'View communications', 'View / edit profile', and 'View school & caterer'. The right panel, titled 'Menu selections', contains a form with three dropdown menus: 'Name:' with 'Danny' selected, 'Booking Type:' with 'Lunch time' selected, and 'Week commencing:' with '31 Aug 2015' selected. At the bottom of the form are two buttons: a blue 'Make selections' button and a grey 'Cancel' button.

Depending upon the booking module being used by the school the payer will either be able to book a meal or select items/choices from a menu. Payers have two hours to pay for the meals/sessions booked, otherwise the bookings will be cancelled.

Booking a meal/session – no menu selection

This feature is available to those payers who have children at schools that have subscribed to the bookings module.

- **Book a meal/session:** click on the day to book the meal for and that day will turn green with a tick.
- **Cancel a previously booked meal/session:** click on Clear day in the column of the day the meal is booked for.
- **Past event:** past bookings/sessions will show with a 'Padlock' sign as they are not editable after the event.
- **Bookings breakdown:** the right of the screen will show a breakdown of meals or sessions booked or cancelled during this login session, credit to be added before they logout, current balance of that account (school meal account or similar) and total cost of all bookings they have made during this session.
- **<<Previous or Next>>:** go to the previous or following week to make more bookings.
- **Save and select more:** click to save the bookings on this screen and make additional bookings before paying.
- **Checkout:** click to go to the basket and proceed to pay securely.

Dan Bolton - Lunch time

<< Previous Next >>

Week: 30th Jan 2012

Show symbols Help Hide info

Dan Bolton - Lunch time

Mon 30 Jan	Tue 31 Jan	Wed 1 Feb	Thu 2 Feb	Fri 3 Feb
School meal	School meal	School meal	School meal	School meal
Clear day				

Bookings added 1

Bookings cancelled 2

Credit added today £2.00

Balance today £0.00

Cost of all bookings £6.00

Payment due £6.00

Checkout

Save and select more

Cancel

Booking a meal/session – menu selection

This feature is available to those payers who have children at schools that have subscribed to the selections module.

- **Book a meal/session:** click on the menu item (or items) to make the selection. The item(s) will turn green with a tick.
- **Cancel a previously booked meal/session:** click on 'Clear day' at the bottom of the column of the day the meal is booked for.
- **Past event:** past bookings/sessions, or sessions within the cut-off time set by the school, will show with a 'Padlock' sign as they are not editable after the event or once the cut-off time has expired.

- **Bookings breakdown:** the right of their screen will show a breakdown of meals/sessions booked or cancelled during this login session, credit to be added before they logout, current balance of that account (school meal account or similar) and total cost of all bookings they have made during this session.
- **<<Previous or Next>>:** go to the previous or following week to make more bookings.
- **Save and select more:** click to save the bookings on this screen and make additional bookings before paying.
- **Checkout:** click to go to the basket and proceed to pay securely.

Danny Dyer - Lunch time

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Next >>

PLEASE NOTE: When confirming your booking, if the Payment due value is not £0.00, you will need to credit the account within 2 hours. Failure to do so will result in your booking being cancelled.

This will in no way affect free school meal bookings as these are always considered as zero cost.

Mon 14 Sep ✓	Tue 15 Sep ✓	Wed 16 Sep ✓	Thu 17 Sep ✓	Fri 18 Sep ✓
Bread Roll ✓	Bread Roll ✓	Bread Roll ✓	Bread Roll ✓	Bread Roll ✓
Gluten Free Bread Roll	Gluten Free Bread Roll	Gluten Free Bread Roll	Gluten Free Bread Roll	Gluten Free Bread Roll
Beef Burger with Potato Wedges ✓	Roast Chicken with Potatoes and Vegetables ✓	Chili Con Carne with Rice ✓	Shepherd's Pie with Vegetables ✓	Fish with Mashed Potato and Peas or Beans ✓
Vegetarian Burger with Potato Wedges	Vegetable Bake with Potatoes	Vegetable Curry with Rice	Vegetable Pie with Potatoes	Cheesy Potato Pie with Peas or Beans
Trifle ✓	Chocolate Chip Muffin ✓	Fruit Shortcake ✓	Jelly and Ice Cream	Profiteroles ✓
Fruit	Fruit	Fruit	Fruit ✓	Fruit
Clear day	Clear day	Clear day	Clear day	Clear day

Week: 14th Sep 2015

Show symbols | Help | Hide info

Danny Dyer - Lunch time

Bookings added	5
Bookings cancelled	0
Cost added today	£10.00
Balance today	10.00
Cost of all bookings	£20.00
Payment due	£10.00

Confirm bookings

Save and select more

Cancel