SchoolPaymentPortal

https://www.schoolpaymentportal.com

# Parents Guide to

Getting Started

Contents

Welcome to SchoolPaymentPortal

Your school has chosen to use LunchTime Software for their School Lunch Management. As part of the LunchTime suite of software, SchoolPaymentPortal is being offered as a safe, secure and convenient way for parents or guardians of students manage school payments. You will have the opportunity to track purchases, create reminders and set up automatic payments.

This document will assist new users with the most basic functionality of SchoolPaymentPortal. Any questions or concerns with a student's account should be directed to your schools food services team.
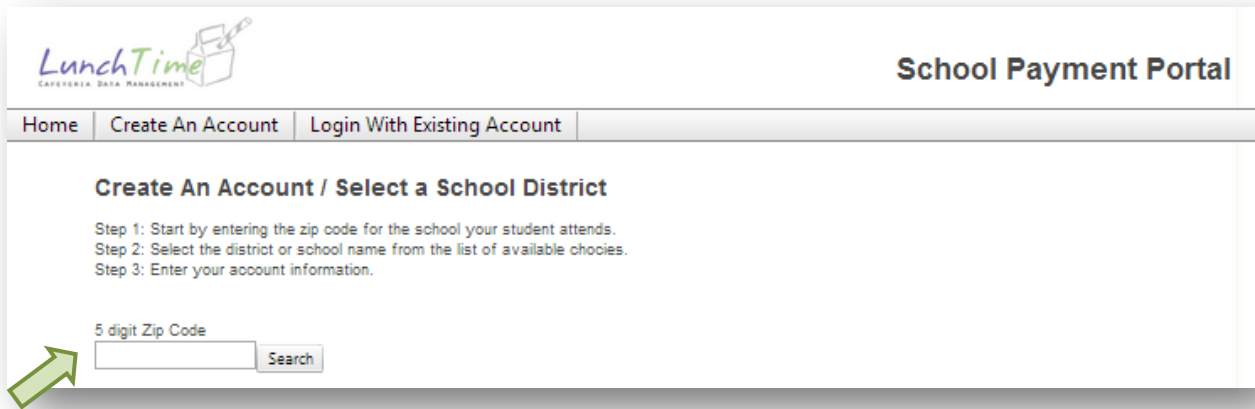
The Home Screen
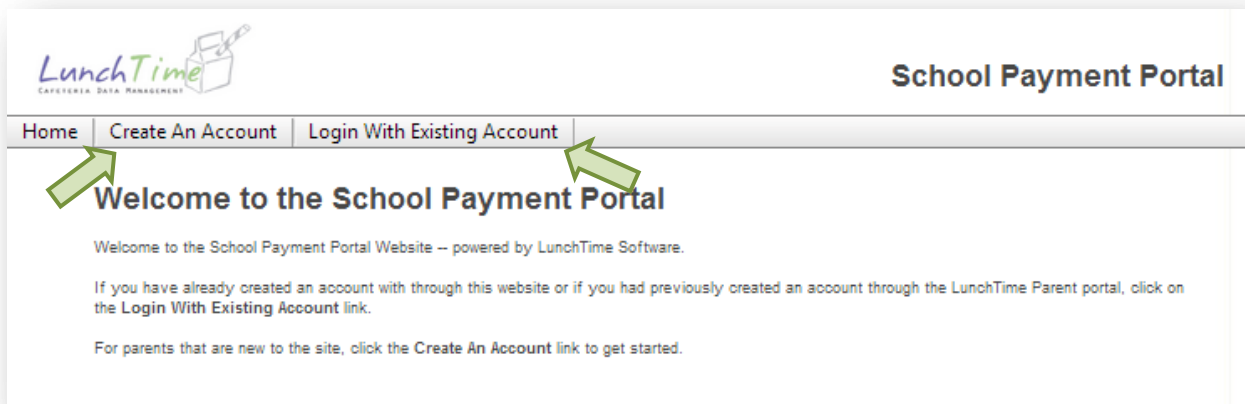
The first time you access www.SchoolPaymentPortal.com, you are required to **Create An Account**. Use the tab at the top to begin.

If you are returning to www.SchoolPaymentPortal.com, you will use the tab labeled **Login with Existing Account**

Create An Account

SchoolPaymentPortal is used by many school districts across the country. To begin to identify with your school, please enter the Zip Code for your School and click **Search**.

Depending on the size of your district, you may have more than one option. If you have more than one student and they attend different schools within the district, then check the box by the district name. Otherwise, check the box by your student's school.

Enter the requested information to create your account. All information is required. Your Email Address should be in the format of user@mailprovider.com. We recommend choosing a password that is at least 8 characters in length and contains both numbers and letters. Once you have entered the information, click the **Create Account** button.

Once you have successfully created an account, you will click the HERE link to proceed. You will be taken back to the Home screen where you can now login with an existing account.
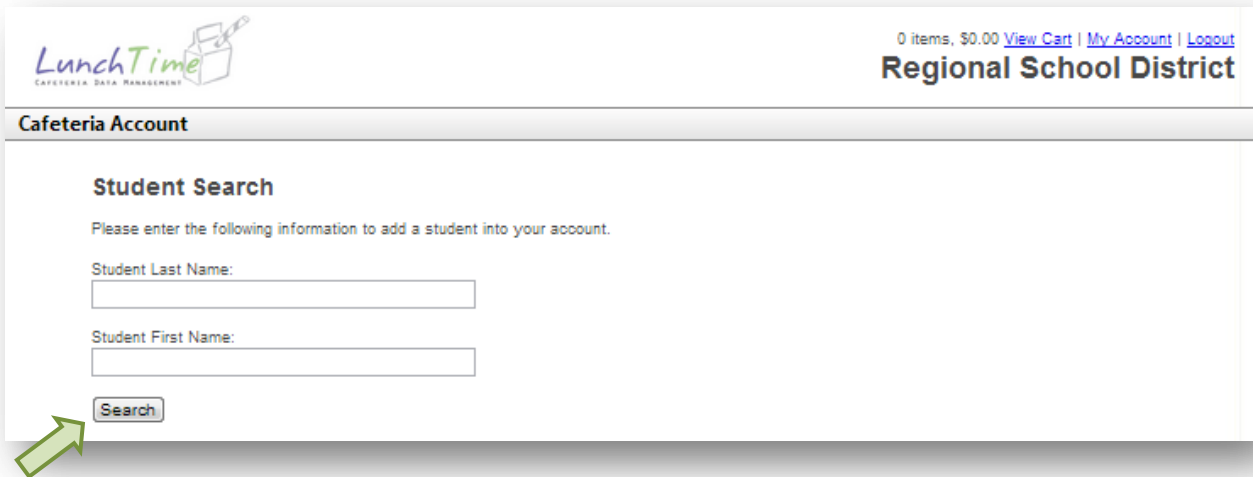
My Account Page

From the **My Account** page, users can add Students; add, modify or delete Payment Sources; review Payment History or review account information (to update email addresses or change passwords). Click on the HERE link to go to the Student Search.

Add Students
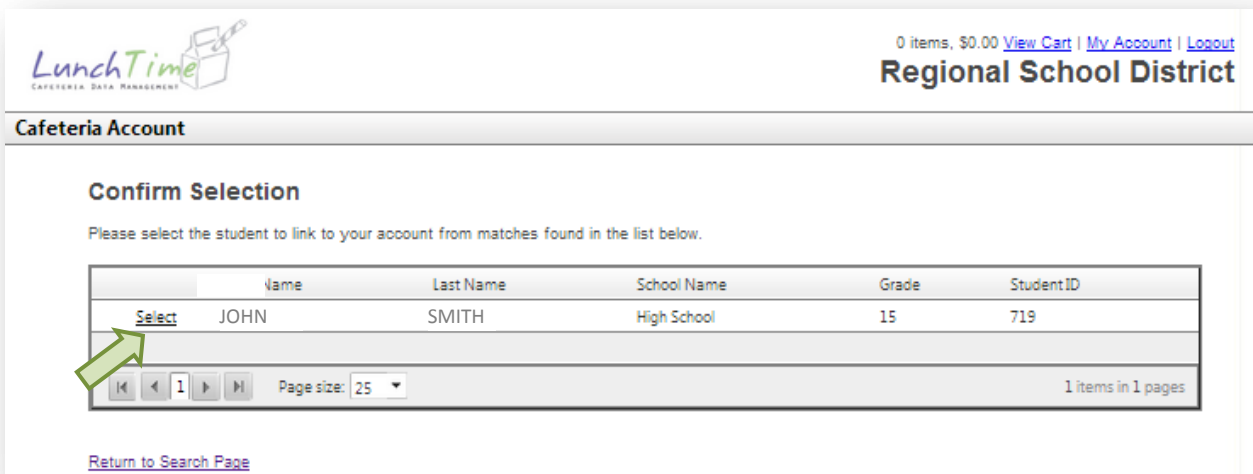
Your school will determine the criteria required for searching students. Some schools may choose to use any combination of name, date of birth or school id's for search terms. Type in the requested search criteria and click **Search**.

Confirm Selection

Confirm the identity of your student and click **Select**. You will be returned to the **My Account** Page which will now show your student information.

Manage Cafeteria Account

You can continue to Add Students to your account as needed.

After adding all your students, click **Manage Cafeteria Account** to proceed.

From this screen, you may **View Transactions**, **Make a Deposit** or **Set Up** notifications or automatic payments. Each of these options will be discussed next. While the **Restrictions** link may be visible, this function may not be available for your school. Check with your school's cafeteria for additional information on **Restrictions**.

View Transactions

Click on **View Transactions** to see the most recent transactions by this student.

You have the option of exporting this data in either Word or Excel format. When you are finished reviewing and/or exporting your students' transactions, you can click **Back to LunchTime Account** list which will take you back to the **Cafeteria Account** page.

Notification Settings

Notification Settings

To setup Notification settings for the patrons in your account, click the "Set Up" link next to the name of the patron you wish to set up.

	First Name	Last Name	Grade	Option	Balance	Deposit
Set Up	JOHN	SMITH	15	None		

The following options are available:

- Automatically receive an email when a patron's account drops below a specified level
- Automatically add funds to a patron's account when it drops below a specified level
- Automatically receive an email with a link to add funds to a patron's account when it drops below a specified level

Cafeteria Account

Notification Options

Patron Name:
John Smith

Notification Option:
◉ Email Notification once balance falls below a specified amount.
◯ Email Notification with a link to pay online once balance falls below a specified amount.
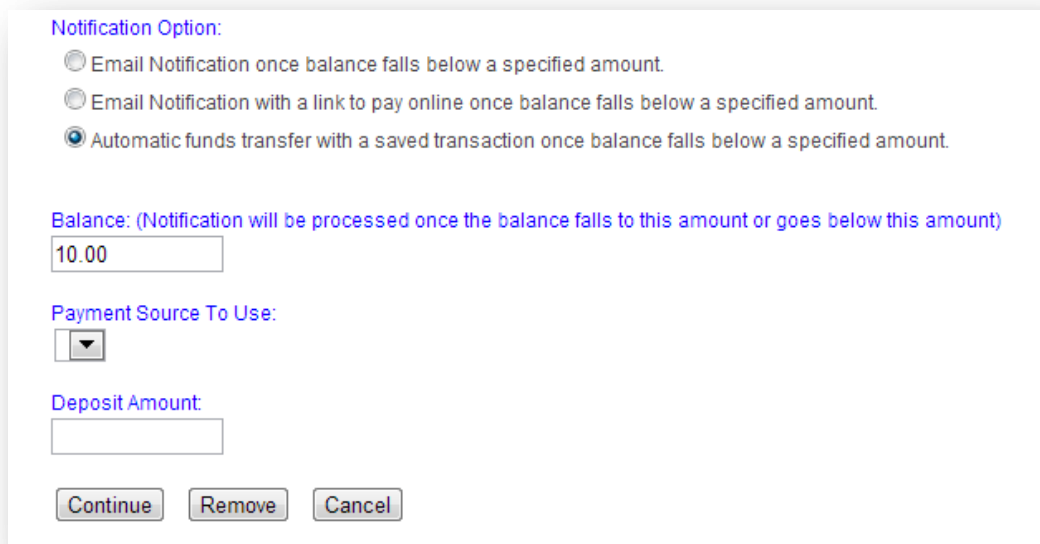◯ Automatic funds transfer with a saved transaction once balance falls below a specified amount.

Balance: (Notification will be processed once the balance falls to this amount or goes below this amount)
`10.00`

[Continue] [Remove] [Cancel]

Using this screen, select the balance that will trigger your notification. You have three options with the notification.

- The first option is a basic notification. This will send an email to the email address used to establish the account indicating that the student balance has fallen below the trigger amount.
- The second option will include a link to pay online –the link will automatically redirect you to the Make Payment section of the Payment Portal.
- The third option will automatically transfer funds using the saved transaction when the trigger amount has been reached.

Once an initial payment has been made (see Making a Payment) you may be prompted to save the payment source. If you elect this option, you will then be able to use this payment source to automatically fund the student account.

Note: Saved Payments are NOT saved by the school. Neither the school nor LunchTime Software will have access to the payment source. Saved payments are saved with a payment processor who is PCI compliant and follows industry standard security to protect your identity.

The **Remove** button will allow you to remove an automatic payment.

The **Cancel** button will return you to the Manage Cafeteria Account page.

The **Continue** button will establish the automatic payment. This option will require a confirmation on the next screen to proceed. It will then return you to the **Manage Cafeteria Account** page.

Make a Deposit

On the **Manage Cafeteria Account** page, choose **Make a Deposit**.

You will see the current balances for all your students and you will have the ability to deposit specific amounts to each student. Enter the amount you wish to deposit for each student and click **Continue.**

Select **Add to Cart** to continue or **Cancel** to return to the previous screen.
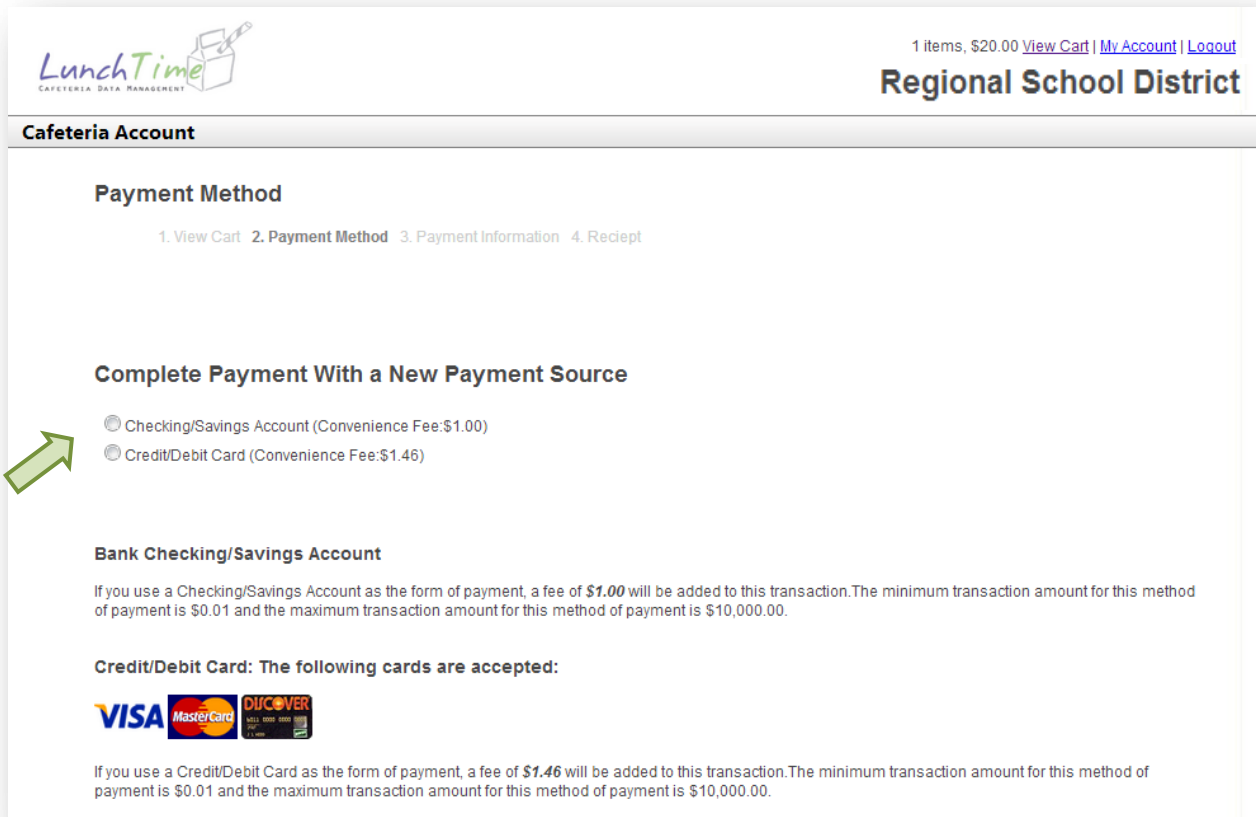
This is your final opportunity to make changes. Once you click **Purchase Now** your payment account will be charged. Please click only once. Multiple clicks could result in multiple charges. It may take up to two minutes to fully process.

First Time Purchase

If this is the first time you have used SchoolPaymentPortal, you will be prompted to add a payment source. Your school may accept payment by Checking/Savings account and/or by major credit card. Specific fees for each method are detailed.

Once you choose your payment source you will be directed to the next page for additional account information. You will also have the option to save this information for future use. Again, saved information is secured by PCI compliant payment processors. You will be able to modify and/or delete your payment source by going to **Saved Payment Sources**.

Enter the required billing information and click **Continue**. Click on the checkbox by **Save Payment Source for Future Use** if you plan to use this method again or if you have automatic notifications set.

Enter the required information for Checking/Savings account use (*above*) or for Credit Card use (*below*). Carefully review the information on the **Shopping Cart Total**, **Convenience Fees** and **Total Purchase**. Once you have confirmed your transaction, click in the box **By checking this box, I hereby authorize $XX.XX to be drawn from my checking/savings account (or authorize my credit card to be charged)** and finally click **Submit Payment**.

Confirmation

You will receive a confirmation of your payment. You should also receive an email confirmation at the email address associated with the payment account. It is recommended that you print and save your receipt.

Once you have reviewed, printed and/or saved your receipt, click on **My Account** in the upper right-hand portion of the screen.

Saved Payment Sources

Click on **Saved Payment Sources** to view any payment source you chose to save in the payment information screen (see above)

From the **Saved Payment Sources** screen, you can **Modify, Delete** or **Add a New Payment**. Click on **Modify**. You will be returned to the **Payment Billing Information** screen associated with this payment method (see pg. 16). Review this information and make any necessary changes. You will be forwarded to your **Bank Account Information** screen (pg. 17) or your **Credit Card Information** screen (pg 18). The most common change will be to update expired credit card information. You will be returned to the **Saved Payment Sources** page. Use the same procedures to **Add a New Payment Source**.

Payment History

Click the **Payment History** tab.

The **Payment History** screen will allow you to view a record of your recent payments.

My Info

Use the **My Info** screen to make any necessary changes to your personal information. This information will ***NOT*** be passed to your students' school. Contact your school to update any information they may have on file.

Contact Information

If you have any questions, concerns or technical issues using the SchoolPaymentPortal, please contact your school.