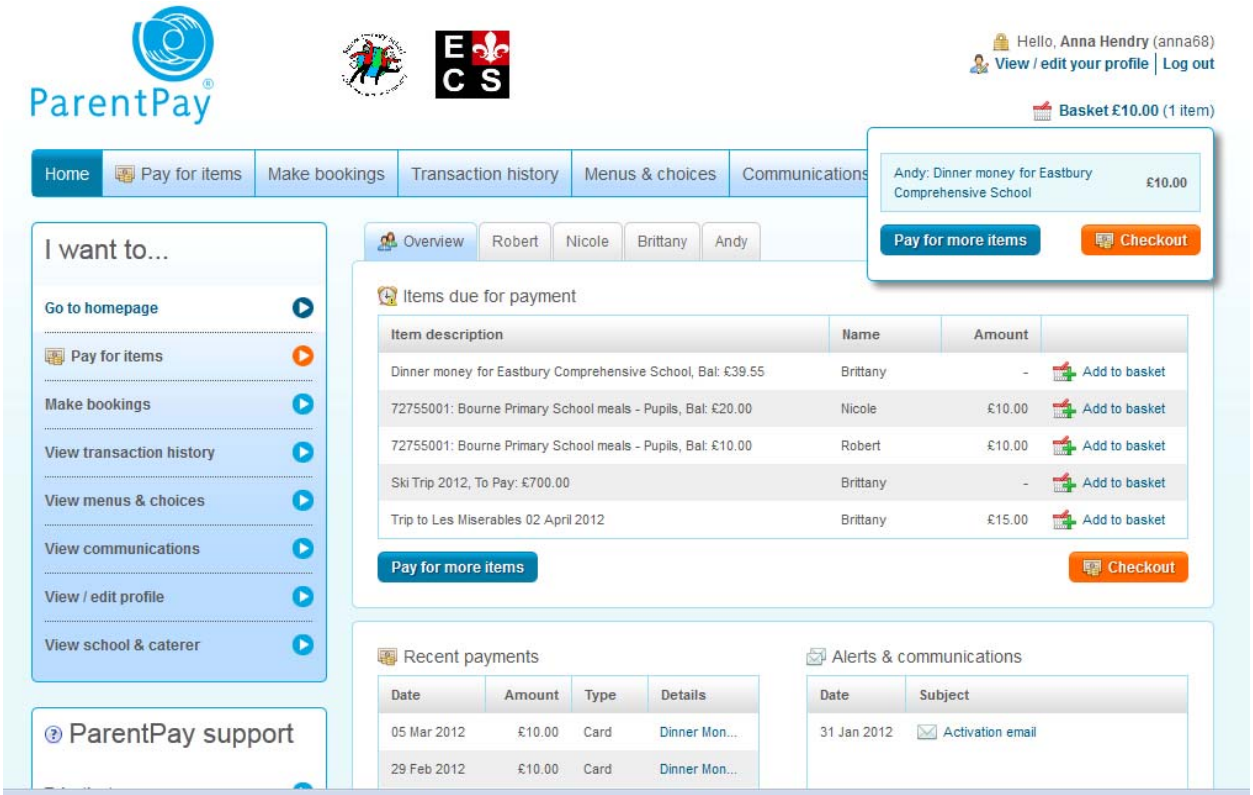
The New ParentPay for Parents

Guide to new interface and features



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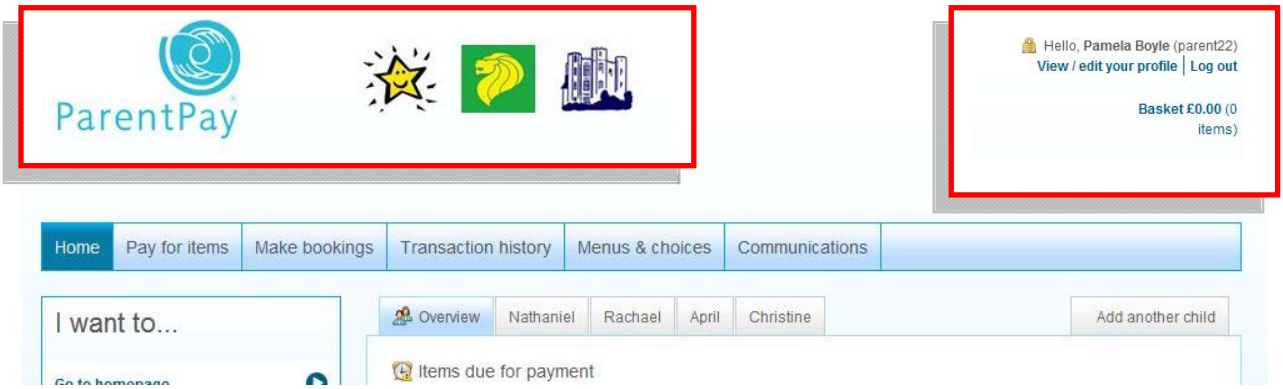
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The NEW ParentPay for parents

Following extensive customer research and independent usability studies we have developed a fresh, simple user-friendly site for the new ParentPay application.

Your home page

The logos of all schools your children attend will be visible at the top of the screen; clicking on a school logo allows you to view that school's individual ParentPay welcome page.



The top right of your home page will display your name (entered when you activated your account) and your username. You will also be able to use the quick links in this area to:

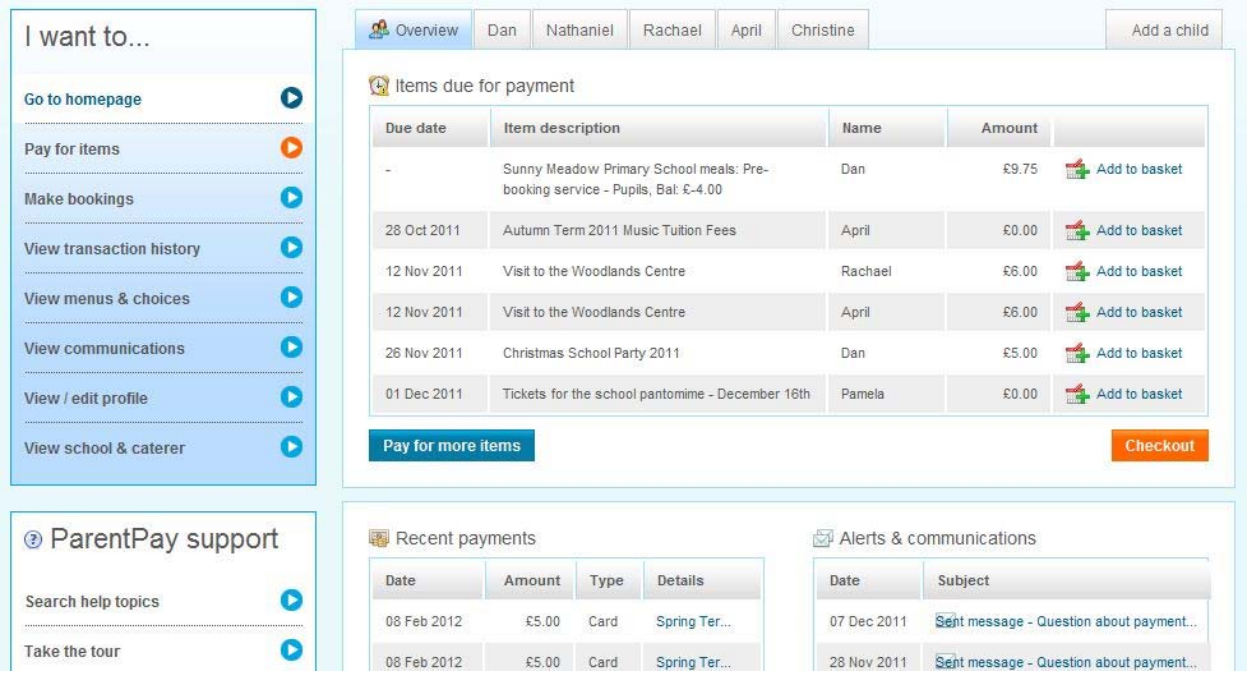
- **View / edit your profile**
- **Logout**
- **Basket**: add, edit and view items in your basket before proceeding to **'Checkout'**

The **'Overview'** area of the page displays an overview of your children - if you have already added all your children to a single account you will also see tabs for your other children, clicking on these tabs shows information specific to that child. If you have not already created a single account for all your children using ParentPay and want to find out how to do so please goto the section:'**Single account / login for all your children'**

In addition, you'll see another tab on the right side of your home page **'Add a child'** – this is where you'll go to add more children to your account providing the school they attend is a ParentPay school.



Overview > Items due for payment: Payment items across all your children.



Recent payments: A breakdown of the most recent payments you have made across all of your children.

Alerts & Communications: A list of the most recent messages across all your children that you have received from your child/children's schools or those you've sent to school from within ParentPay and any automated alerts you have received.

The left side of your screen has clear, concise **'I want to...'** navigation and a **'ParentPay support'** area should you need any assistance.

Account Activation & Single Account / login

In addition to a new look and feel one of the key features we've introduced is the ability for parents with children at different schools to add up to six children to a single account regardless of which school their children attend (providing those schools subscribe to ParentPay). This means parents will only ever have to remember one username and password to use ParentPay. **Here's how:**

Existing parent user – creating a single account / login

IMPORTANT: you must log out of all your ParentPay accounts before you start.

Choose one account to 'add' the rest of your accounts to. This will become your single account / login for all your children in future; the username and password for this account will become the 'only' set of account login details you use in future.

- Go to www.parentpay.com
- Login to the account you wish to have as your future login for all children/schools



Next: Go to the **'Adding children to your single account/login'** section below for information on how to 'add children' to your account.

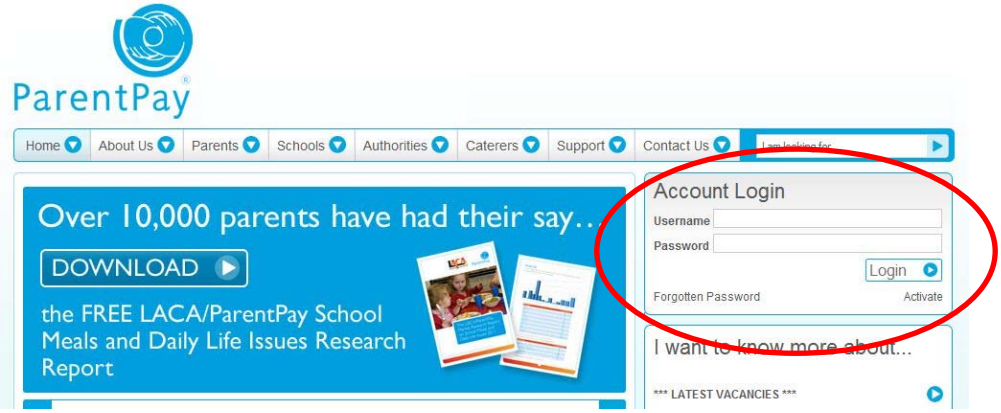
New parent user

If you have 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 those children, choose one child's details to activate your account.

Go to www.parentpay.com

Enter the username and password you have received for one of your children in the account login area.

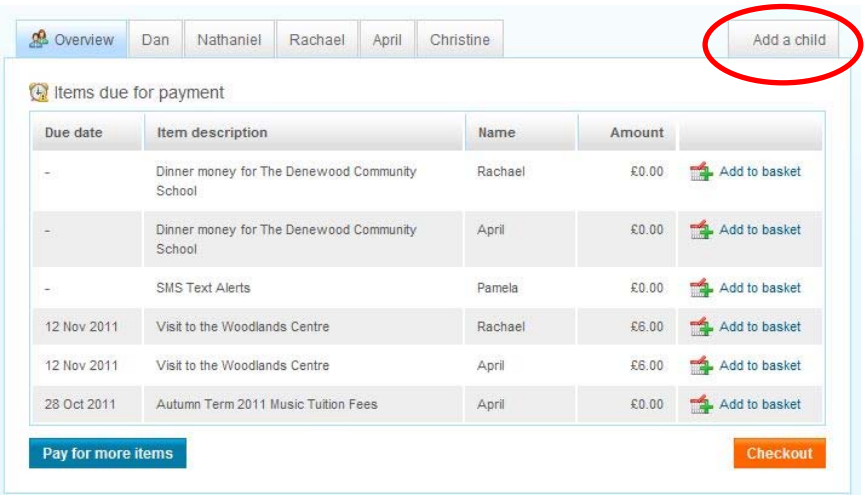
Click **Activate.**



Next: See the **'Adding children to your single account / login'** section below for information on how to 'add children' to your account.

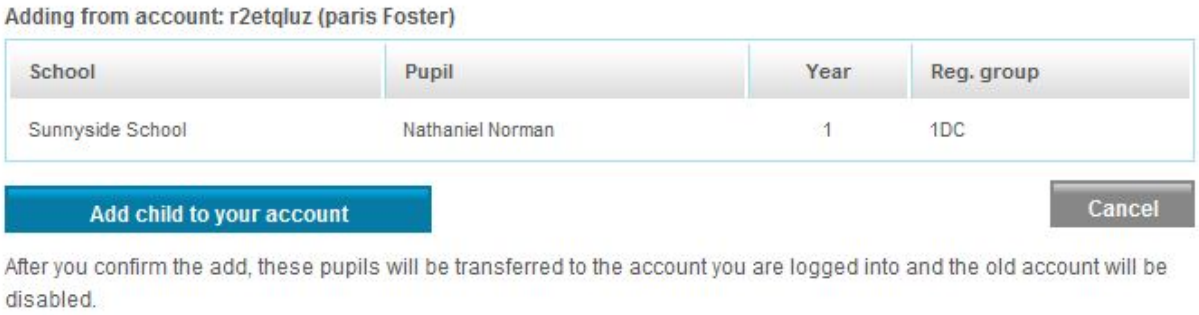
Adding children to your single account / login

- Click on **Add a child**



- **Enter the username and password** for your other child
- Click **Search**

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



Click **Add child to your account** to confirm this is the child you wish to add to your account. You can repeat the above process to add more children to your account.

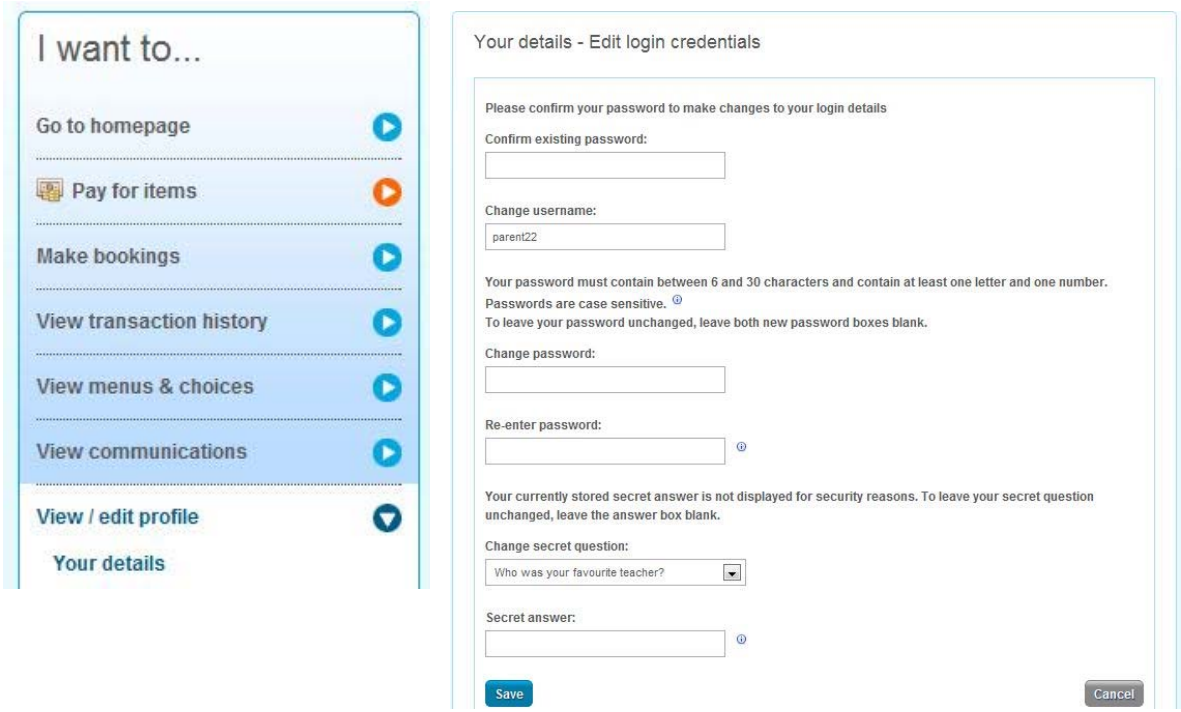
You will then be directed back to your home page which will have changed slightly.

Making changes to your account

Changing your username and/or password

If at any time you want/need to change your username or password you can do so as follows:

Go to the **'I want to…'** area of your home page **View/edit profile>Your details**



First, you'll need to confirm your existing password – then you can make any changes required.

Don't forget to click **Save**.

Managing your phone numbers and email addresses

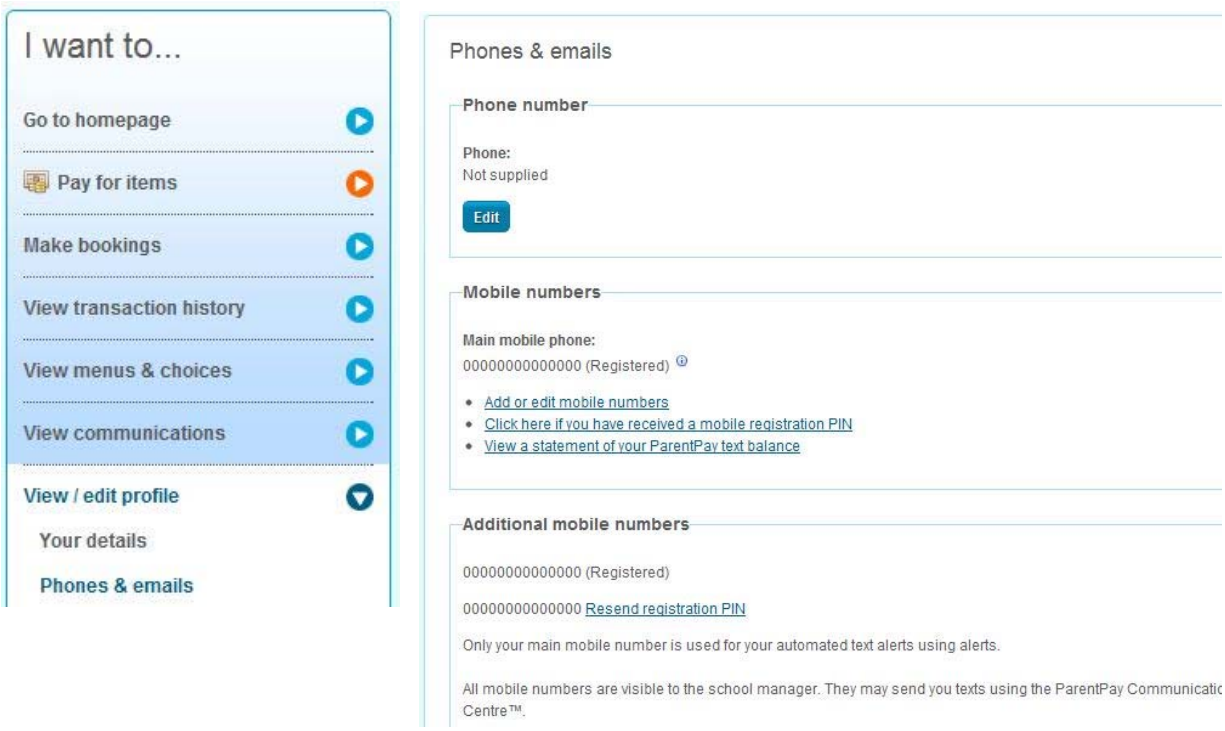
Providing your mobile number in ParentPay not only allows your school/s to send you SMS text message communications but also allows you to opt in to receiving our automated SMS text alerts for things such as a low dinner money balance for your child/each of your children.

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

Text messages sent to you from your child's school are at NO charge to you.

Entering your mobile number

Go to the **'I want to…'** area of your home page **View / edit profile > Phones & Emails**



- **Phone number**: your home, office or other number
- **Mobile numbers**: this area contains your **'main mobile number'** – this will be the number your school uses to send you SMS text messages and will also be the mobile number that any automated alerts you request are sent to.

  When you provide your mobile number you will automatically receive a registration PIN in order to 'register' your mobile – If you do not 'register' your mobile you will be unable to receive automated SMS text alerts from ParentPay.

  You do not need to 'register' your mobile number in order for your child/children's' school to send you SMS text messages.

Three easy steps to enable automated SMS text alerts in your account

Step 1: Registering your mobile number

If you wish to subscribe to our automated SMS text alerts and you have received your registration PIN, you must log back into your 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 your mobile. Your registration PIN is valid for 7 days.

Step 2: Top up your SMS text balance

Automated SMS text alerts that you request are paid for by you at a charge of 0.06p per message sent – as such you must ensure that you maintain a SMS text balance of at least £2.40.

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

Step 3: Choosing the alerts you want to receive

Go to the **'I want to…'** area of your home page **View / edit profile > Alert settings**

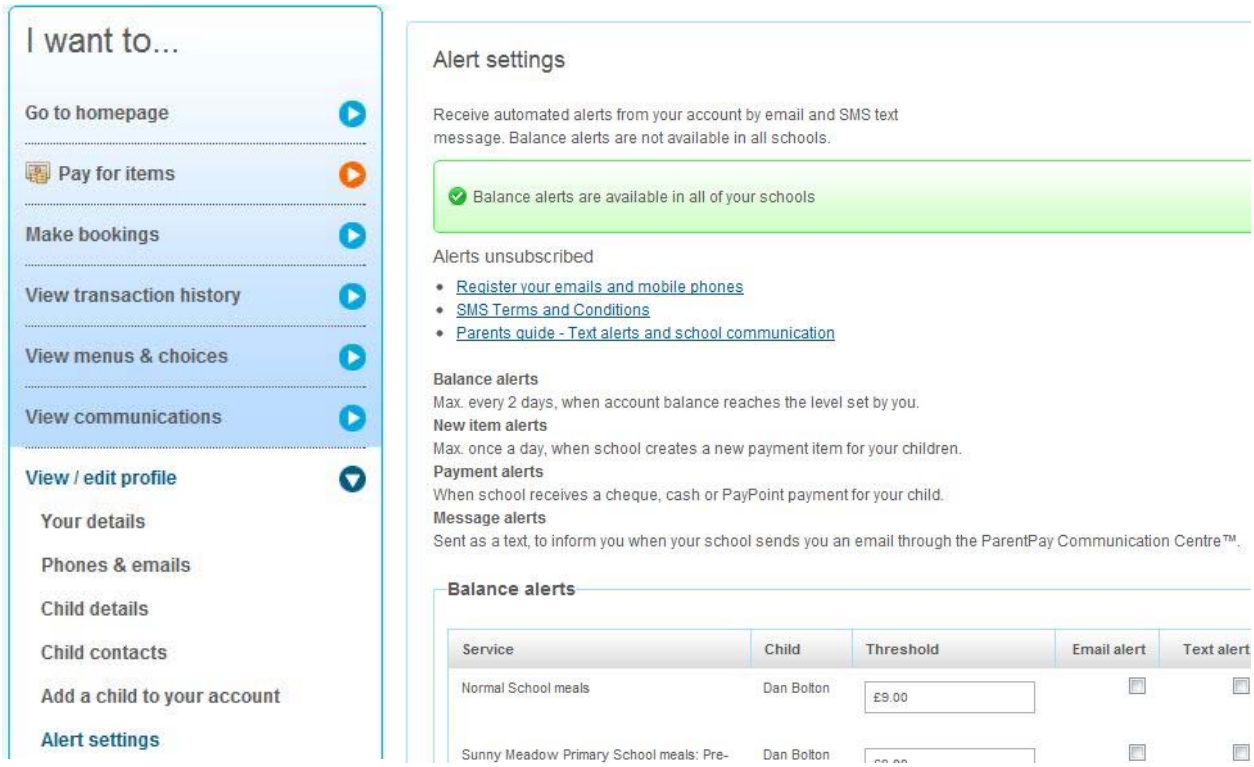
Choose which alerts you wish to receive for your child/each of your children and set the threshold (balance) at which you wish to receive alerts. For more guidance please see our 'Alert settings' area later in this guide.

- **Additional mobile numbers**: you are able to provide a number of mobile numbers to enable the school to send you text messages – schools can choose to 'send to all mobile numbers' in the event of an emergency.
- **Email addresses**: it's likely that you provided an email address and verified it during the activation of your ParentPay account and this will show as your 'main email address' – you are able to provide an alternative email address if you wish.
- **Preferred communication channel**: you can indicate which method you wish your school to use when contacting you for urgent and normal communications – your school can disregard these settings if they choose.

Alert settings

A great feature of ParentPay that allows you to set and receive automated alerts from ParentPay for low balances and other purposes! It's quick and easy to setup giving you peace of mind that your child/children will never be refused a meal due to lack of funds.

Go to the **'I want to…'** area of your home page **View / edit profile > Alert settings**



The 'Alert settings' screen will confirm if you are able to set 'balance' alerts for all of your children – this feature is not available to all schools and is dependent on the type of subscription they have with ParentPay. In the event that you are not able to set automated low balance SMS alerts, a list of the children you are unable to do this for will show on screen.

Balance alerts: simply choose the type of alert you wish to receive (Email or SMS text) and set the 'Threshold' for each child. We recommend that this is set to cover the cost of meals for 3 days in order that you have time to top up before your child may be refused a meal.

New item alerts: you can choose to receive an alert when your child's school sets up a new payment item for your child

Payment alerts – cheques and cash: you can set up alerts to tell you when a cash/cheque payment has been recorded against your child's account in school ensuring you know the payment has been received safely.

Payment alerts – PayPoint: in the event that you are a cash based payer and are using either a PayPoint card for school meal top ups and/or barcoded letters to pay for trips , you

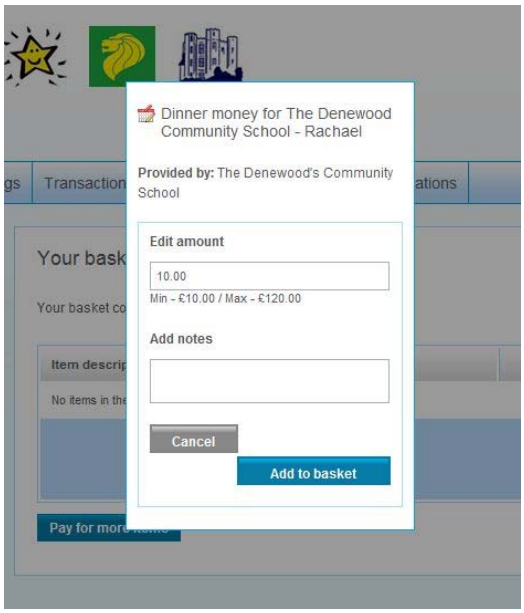
are able to set alerts to notify you once the payment shows in your child's account in school.

Message alerts: a great way to know that your school has sent you a message in ParentPay.

Selecting items and making payments

Using your basket: Quick add items

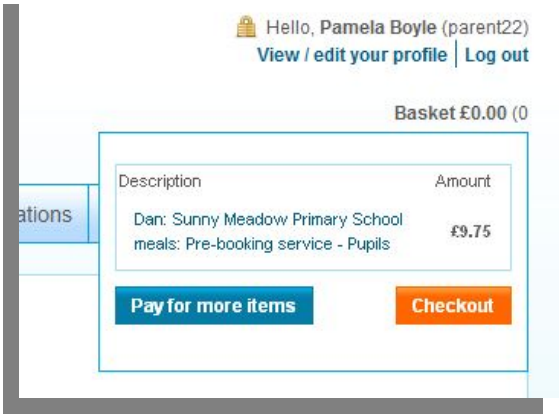
Pay for all your children in one easy place with our quick add basket! The **'Overview tab'** on your home page shows items due for payment across all of your children.



Locate the item you'd like to pay for and click on **Add to basket.**

Edit the **'Amount'** to pay and provide any **'Notes'** and **'Consent'** if appropriate in the pop-up window.

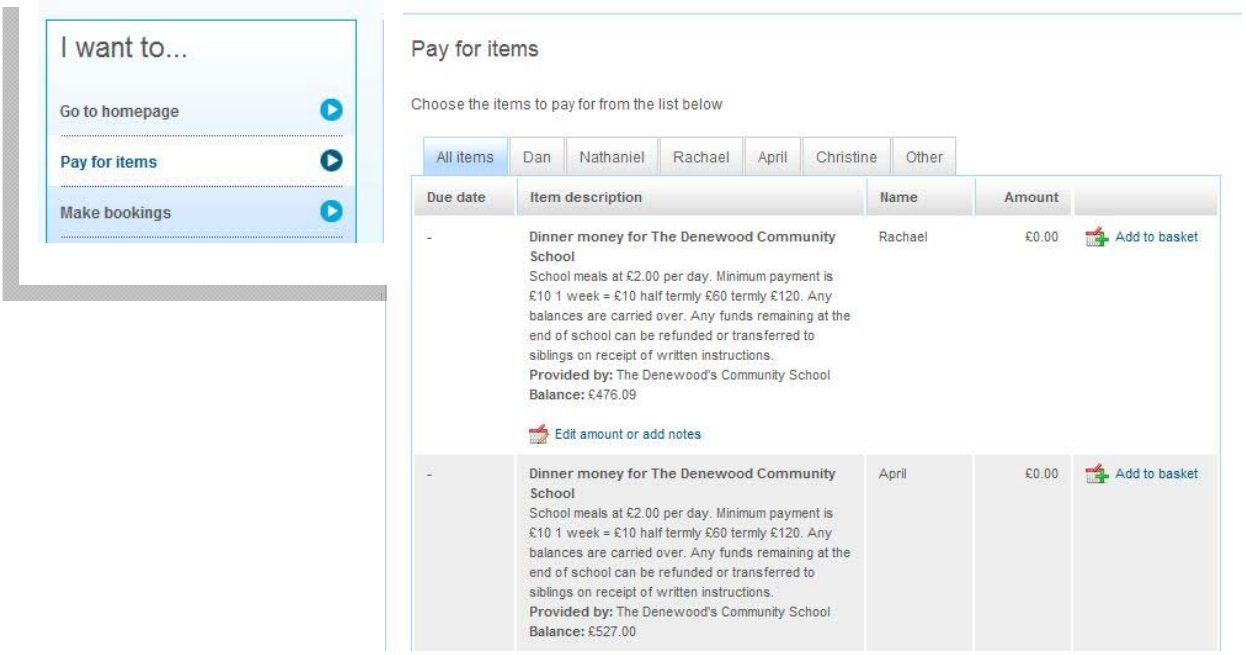
Click **Add to basket** and keep repeating the process until you're ready to **'Checkout'**.



Viewing more details about your payment items before adding them

Go to **Pay for items** in the **'I want to...'** area on the left of your 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.

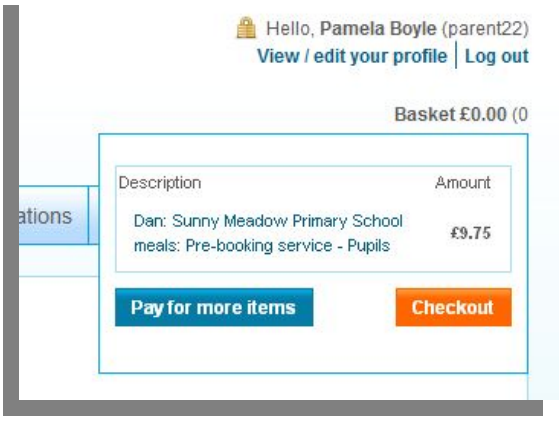


Click on **Edit amount or add notes / Add to basket** alongside the item you wish to select.

Select which items you wish to pay for at that time by clicking **Edit amount or add notes / Add to basket.**

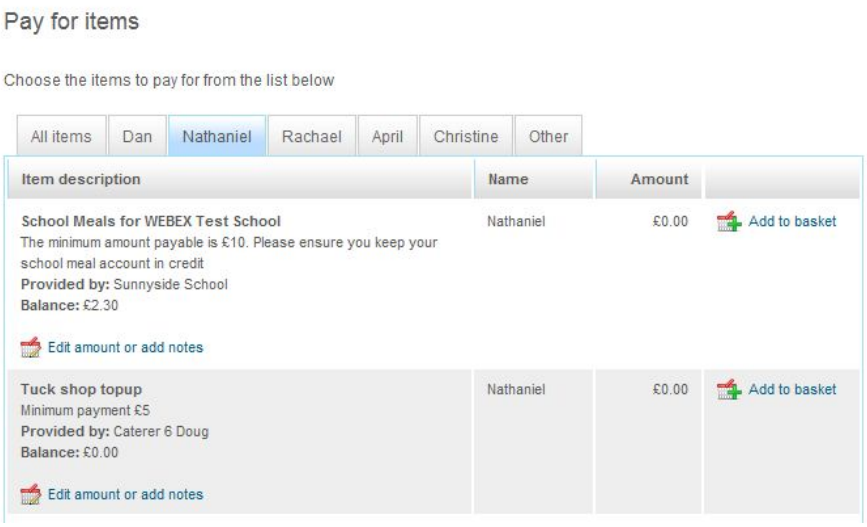
Each time you add an item to your basket, you will be directed to the top right of the screen and a preview of your 'Basket' will pop up. Once ready to make payment go to your 'Basket' and click **Checkout.**

You will have the opportunity to review your purchases, remove any you did not intend to make or edit those you did before proceeding to make your payment as normal by clicking **Pay securely now**.



View and pay by child

Click on the child's name tab from your home page or via **Pay for items** in the **'I want to...'** area on the left of your screen.

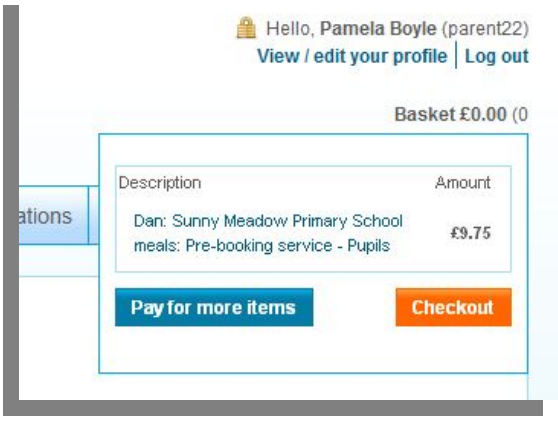


You will see all items available to that child and can proceed to select which items you wish to pay for by clicking **Edit amount or add notes / Add to basket.**

Each time you add an item to your basket, you will be directed to the top right of the screen and a preview of your 'Basket' will pop up.

Once ready to make payment go to your 'Basket' and click **Checkout.**

You will have the opportunity to review your purchases, remove any you did not intend to make or edit those you did before proceeding to make your payment as normal by clicking **Pay securely now**.



Paying for 'other' items

The **'Other'** tab will display items not necessarily associated with your child such as the SMS text alert top-up for those parents that subscribe to our automated SMS text alerts.

Each time you add an item to your basket, you will be directed to the top right of the screen and a preview of your 'Basket' will pop up.

Once ready to make payment go to your 'Basket' and click **Checkout.**

You will have the opportunity to review your purchases, remove any you did not intend to make or edit those you did before proceeding to make your payment as normal by clicking **Pay securely now**.

Transaction history

Quick view your most recent payments

The **'Recent payments'** area, towards the bottom of your home page, shows the most recent payments you have made across all your children.

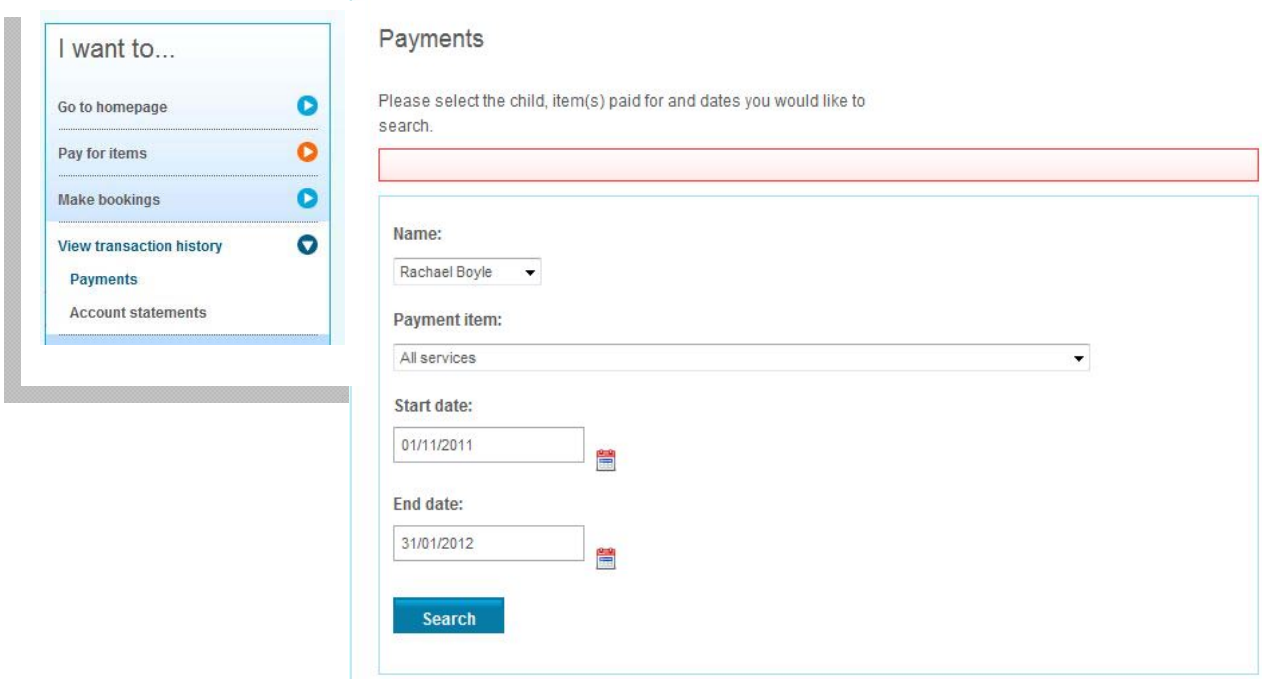
To view more transactions, click on the **View payment history** button. You'll be able to run historical reports across all your children or choose an individual child to view your payment history for.



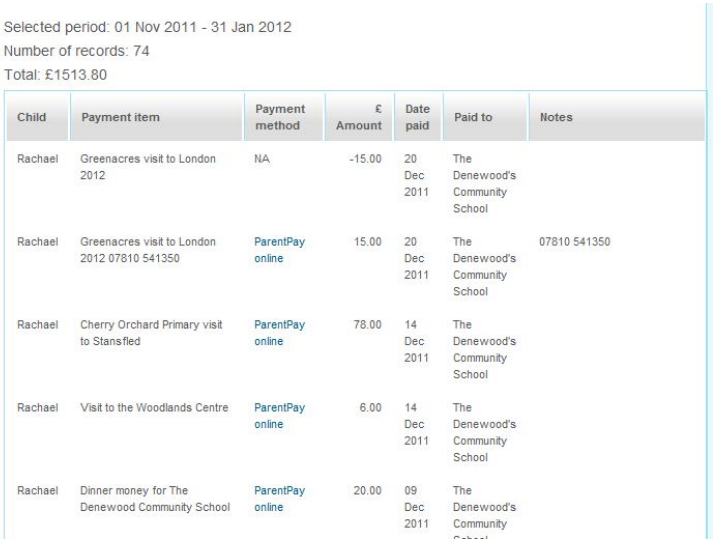
View payments made between dates you choose

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

- **Name:** Choose the child you want to view payments for or leave as 'All' to report on payments across all your children
- **Payment item:** Narrow your report down to the item you paid for or leave as 'All' services for a complete history of payments across all items in that period
- **Start date:** Enter your start date (DD/MM/YYYY) or use the pop-up calendar to select the date
- **End date:** Enter your start date (DD/MM/YYYY) or use the pop-up calendar to select the date
- Click **Search**



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



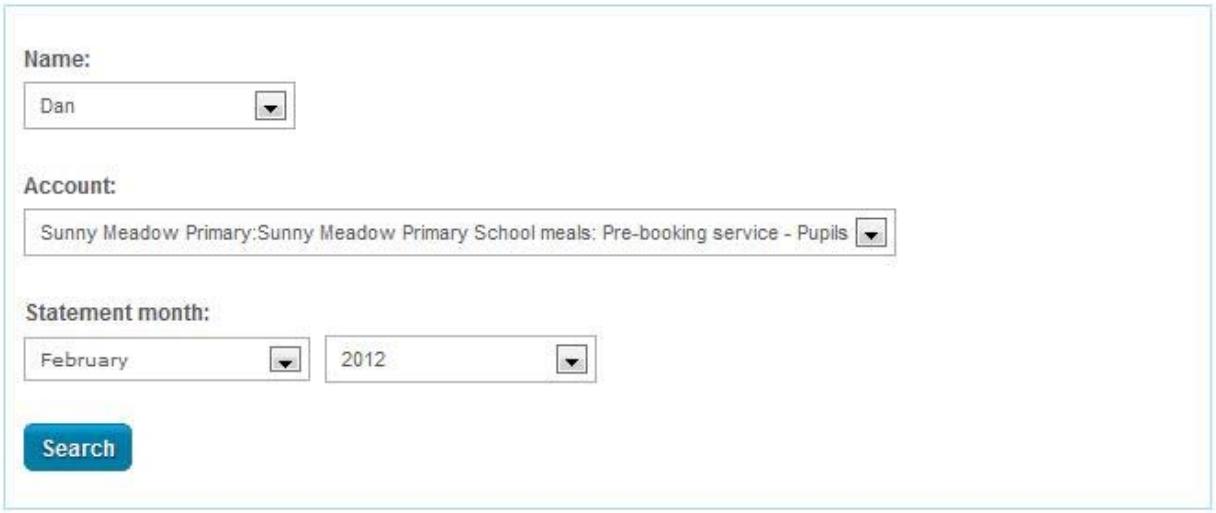
Selected period: 01 Nov 2011 - 31 Jan 2012
Number of records: 74
Total: £1513.80

Child	Payment item	Payment method	£ Amount	Date paid	Paid to	Notes
Rachael	Greenacres visit to London 2012	NA	-15.00	20 Dec 2011	The Denewood's Community School	
Rachael	Greenacres visit to London 2012 07810 541350	ParentPay online	15.00	20 Dec 2011	The Denewood's Community School	07810 541350
Rachael	Cherry Orchard Primary visit to Stansfled	ParentPay online	78.00	14 Dec 2011	The Denewood's Community School	
Rachael	Visit to the Woodlands Centre	ParentPay online	6.00	14 Dec 2011	The Denewood's Community School	
Rachael	Dinner money for The Denewood Community School	ParentPay online	20.00	09 Dec 2011	The Denewood's Community	

View statement of transactions for a selected month

Please note balances are only available to parents whose children attend schools who have opted for daily balances to be sent from the school canteen to ParentPay.

Your 'Account statements' are monthly reports on items where there may be 'transactions/charges' against the payments you 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 your screen.



Total paid in during period: £29.25
Total paid out during period: £4.00
Service provider: Sunny Meadow Primary

Date	Description	Paid out	Paid in	£ Balance
01 Feb 2012	Opening balance			-4.00
20 Feb 2012	ParentPay	0.00	9.75	5.75
20 Feb 2012	ParentPay	0.00	9.75	15.50
21 Feb 2012	Lunch time:Pupil lunch from 21 Feb 2012 charged	2.00	0.00	13.50
21 Feb 2012	ParentPay	0.00	9.75	23.25
22 Feb 2012	Lunch time:Pupil lunch from 22 Feb 2012 charged	2.00	0.00	21.25
29 Feb 2012	Closing balance			21.25

- **Name:** Choose the child you want to view transactions for or leave as 'All' to report on all payments for all your children
- **Account:** Narrow your report down to the item you paid for or leave as 'All' services for a complete history of all transactions

- **Statement month:** Select the month and year using the drop down menus
- Click **Search**

Alerts and communications

Another great new feature enabling you to view a history of all automated alerts, messages sent to you by your children/s' school/s and any messages you have sent to school via ParentPay. You can even access copies of letters, emails and texts!

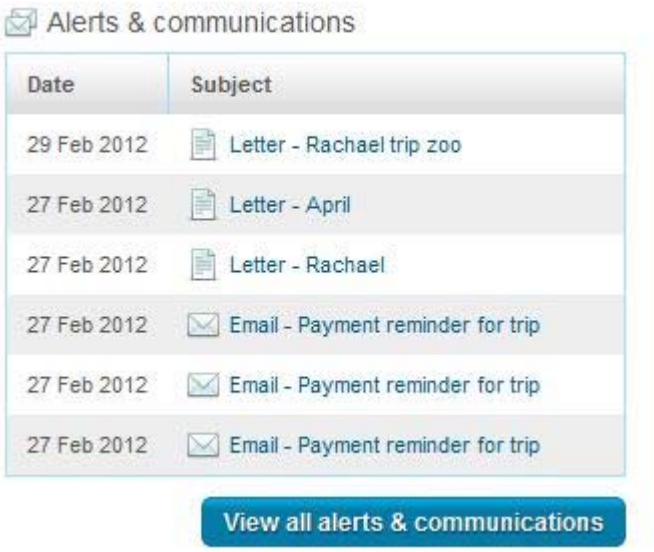
Parents can receive alerts for a range of different reasons; when a new item is added by the school to ParentPay, when a cash or cheque payment has been recorded by the school on your account and where available alerts to low balances on your account. You can receive these alerts by email and / or SMS text to your mobile.

Quick view your most recent Alerts & communications

The **'Alerts & communications'** area, available bottom right of your home page, enables you to view the most recent history, across all your children.

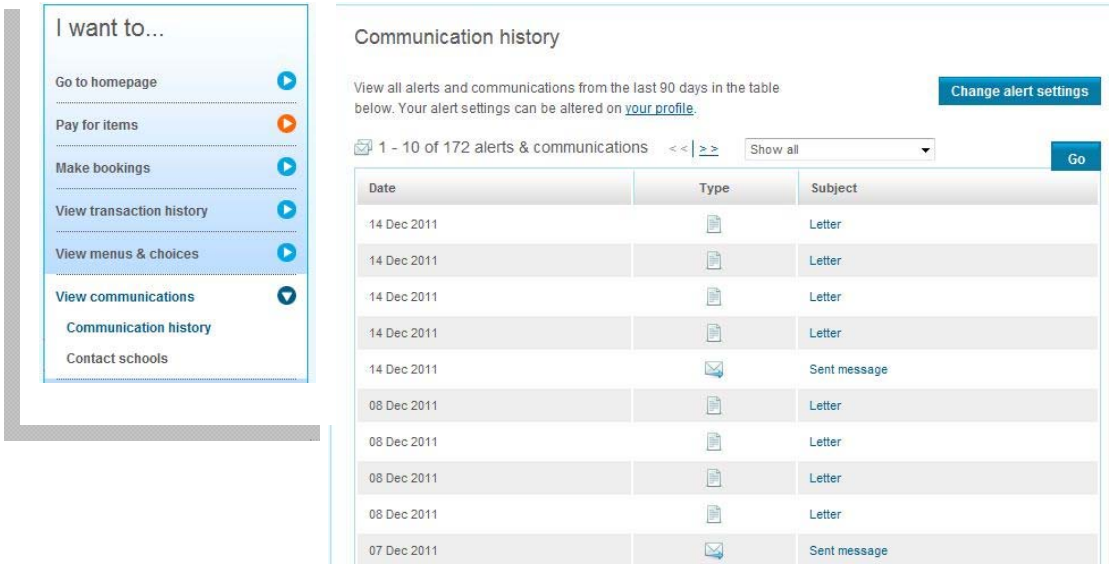
The breakdown shows automated alerts, messages sent to you by your child/children's school/s and any messages you may have sent to school using our 'Contact schools' feature in your account.

Click the **View all alerts & communications** button to see further history.



Communication history

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



You can choose to 'Show all', select 'Only messages from schools' or 'Only messages to schools'.

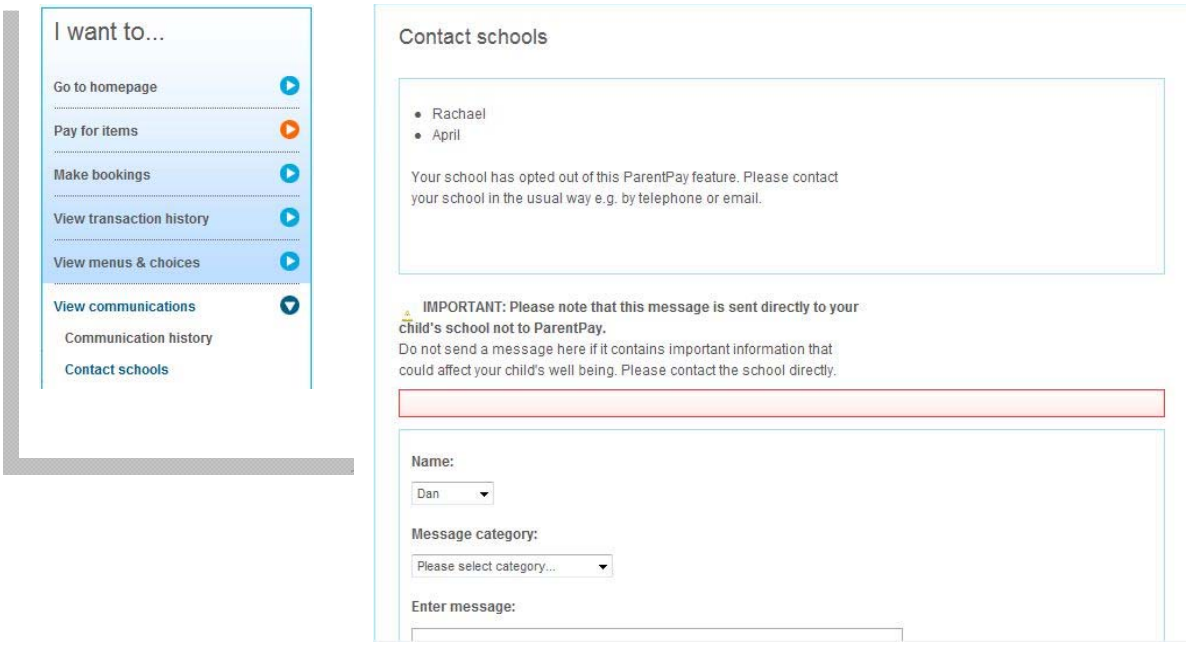
If you wish to change your alert settings you can do so by going to 'View/edit profile' and selecting 'Alerts' or by clicking on the **Change alert settings button** in the **Communication history** screen.

Sending a message to your child's school

If your school has 'opted out' of our 'User messaging' feature you will be unable to contact your school directly within ParentPay using our 'Contact schools' feature. A message will be displayed on screen with a list of children this feature is not available for and you are advised to contact the school in another way.

Please note: The send message feature is intended as a general communication tool; in the event that you need to contact school urgently or tell them important information pertaining to your child you must contact them directly by phone.

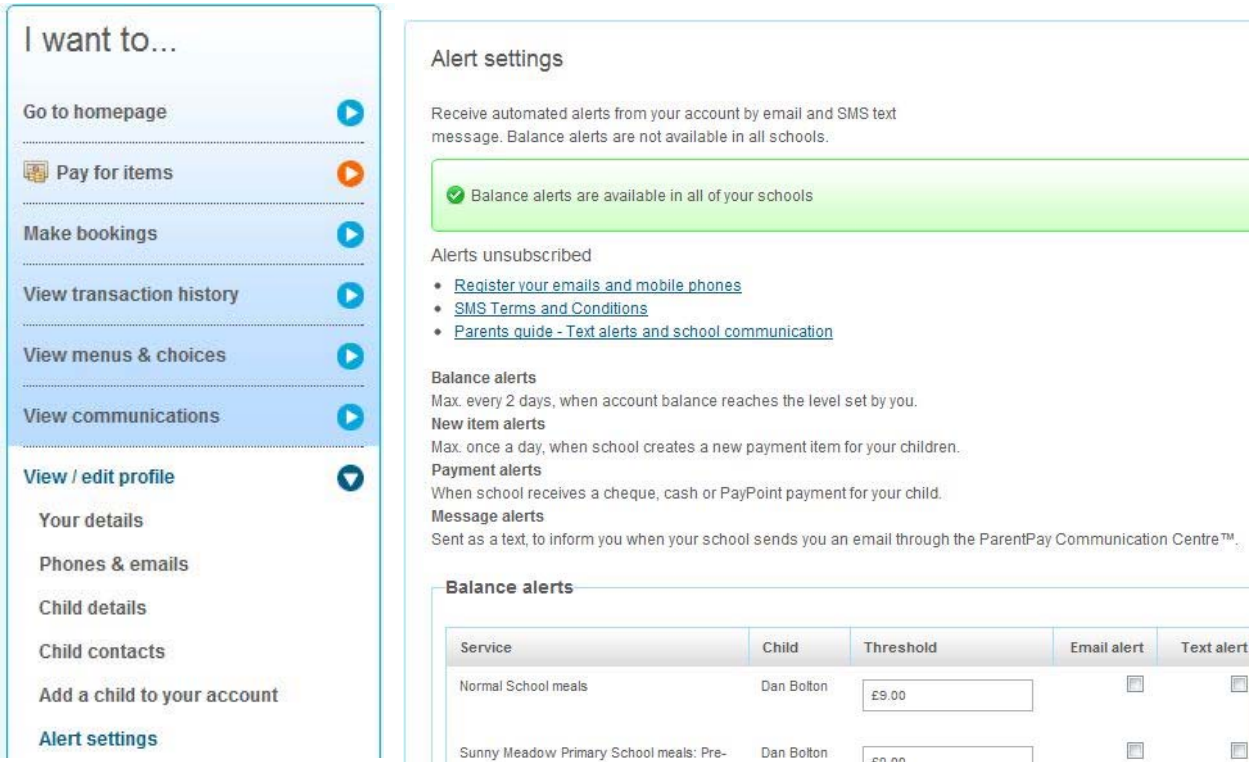
Go to **View communications>Contact schools** in the **'I want to…'** area on the left of your screen.



- **Name:** Select the child the message is in relation to
- **Message category:** Use the drop down menu to select
- **Enter message:** Type your message in the box
- Click **Send message**

Setting up Alerts

Go to the **'I want to…'** area of your home page **View / edit profile > Alert settings**



The 'Alert settings' screen will confirm if you are able to set 'balance' alerts for all of your children – this feature is not available to all schools and is dependent on the type of subscription they have with ParentPay. In the event that you are not able to set automated low balance SMS alerts, a list of the children you are unable to do this for will show on screen.

Balance alerts: simply choose the type of alert you wish to receive (Email or SMS text) and set the 'Threshold' for each child. We recommend that this is set to cover the cost of meals for 3 days in order that you have time to top up before your child may be refused a meal.

New item alerts: you can choose to receive an alert when your child's school sets up a new payment item for your child

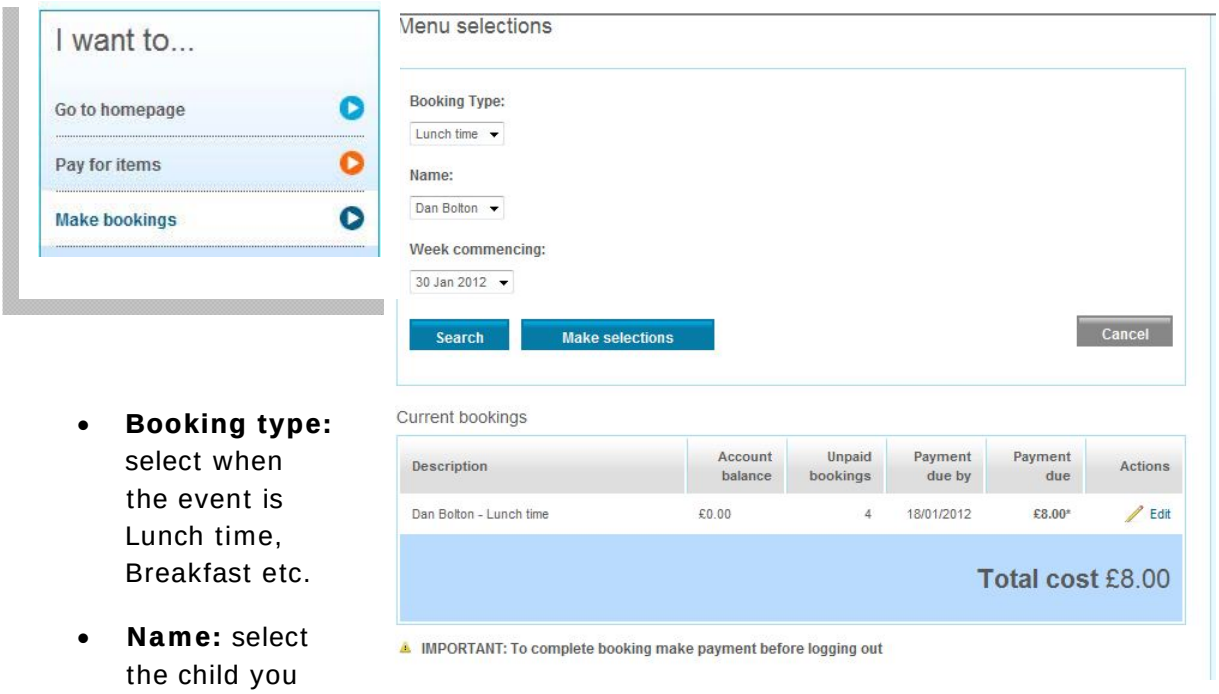
Payment alerts – cheques and cash: you can set up alerts to tell you when a cash/cheque payment has been recorded against your child's account in school ensuring you know the payment has been received safely.

Payment alerts – PayPoint: in the event that you are a cash based payer and are using either a PayPoint card for school meal top ups and/or barcoded letters to pay for trips , you are able to set alerts to notify you once the payment shows in your child's account in school.

Message alerts: a great way to know that your school has sent you a message in ParentPay.

Make bookings

If the school is using our 'bookings/selections' module, you may be able to pre-book meals or sessions for certain types of payment items such as school meals and before/after school clubs. Go to **Make bookings** in the **'I want to…'** area to the left of their screen.



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

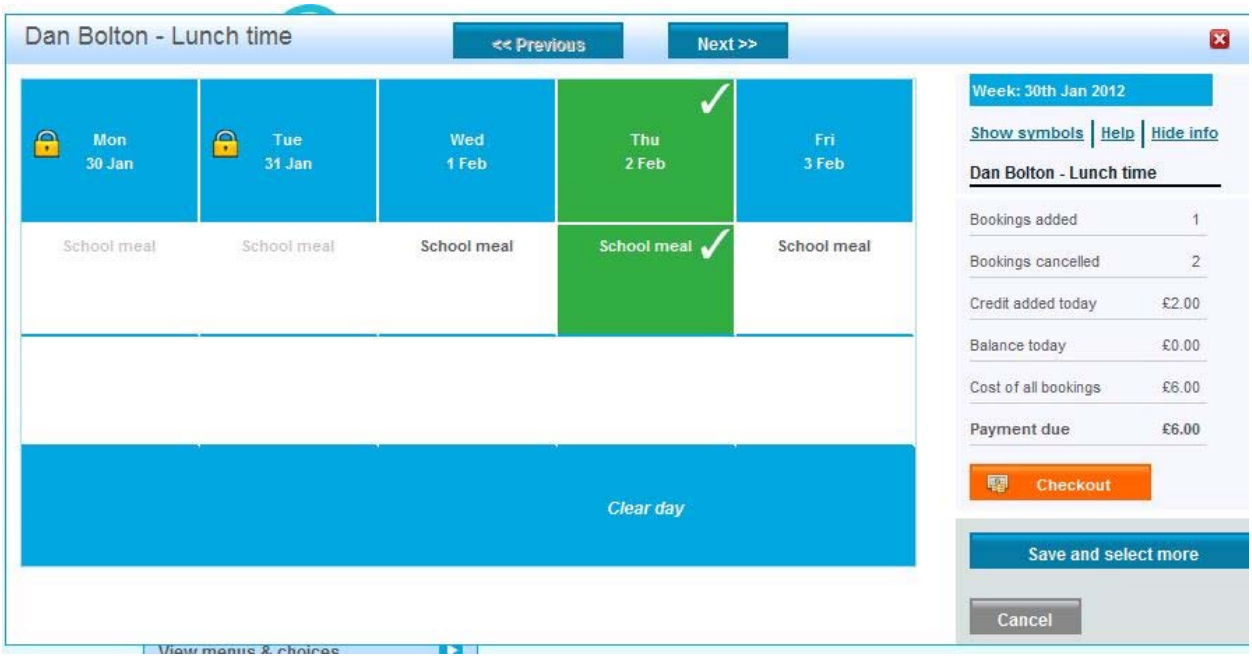
You can then view 'current bookings' for that 'booking type' on screen (as per the Current bookings area shown in the above screenshot).

- Click **Make selections** to proceed to make your bookings

Booking a meal/session – no menu selection

This feature is not available to all parents only those that have children at schools that have subscribed to our bookings module.

- **Book a meal/session:** simply click on the day that they want 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 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

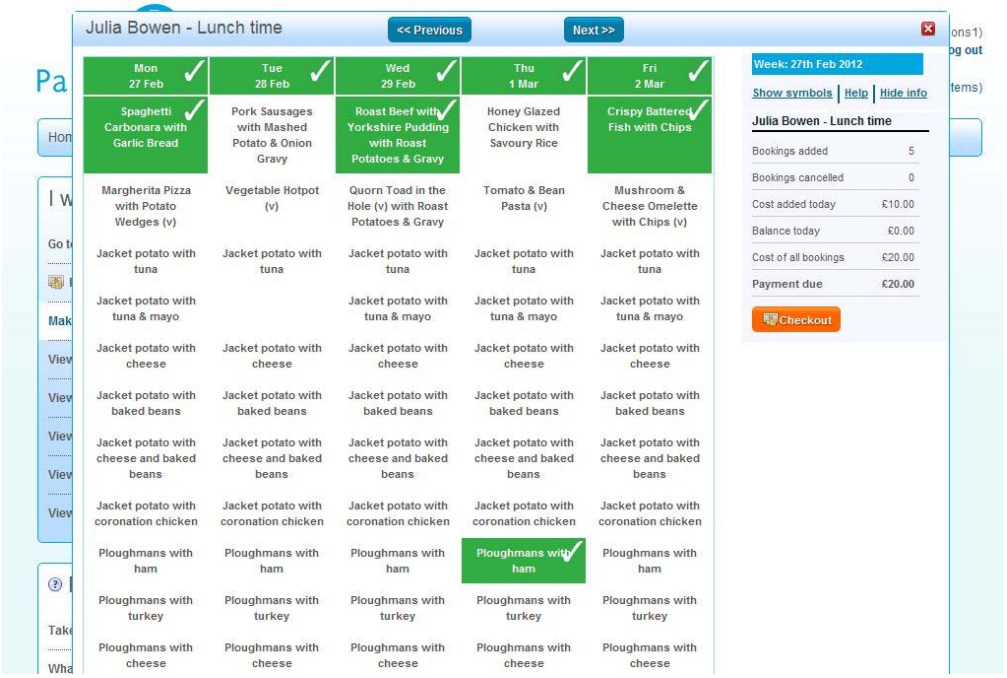


- **<<Previous or Next>>:** use these buttons to go to the previous or following week to make more bookings at this time
- **Save and select more:** click to save the bookings on this screen and make bookings for another child before paying
- **Checkout:** click to go to the basket and confirm that they wish to **Pay securely now**

Booking a meal – menu selection

This feature is not available to all parents only those that have children at schools that have subscribed to our 'bookings selections' module.

- **Book a meal:** simply click on the menu item you want to book for your child and that item 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 will show with a 'Padlock' sign as they are not editable after the event
- **Bookings breakdown:** the right of your screen will show a breakdown of meals/sessions booked or cancelled during this login session, credit to be added before you logout, current balance of that account (school meal account or similar) and total cost of all bookings you have made during this session.

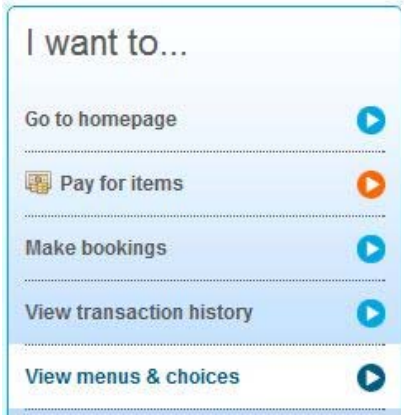


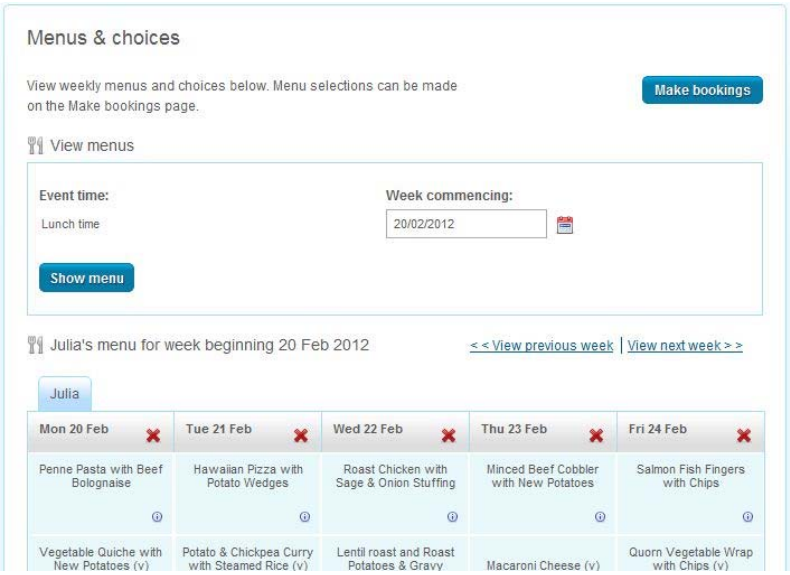
- **<<Previous or Next>>:** use these buttons to go to the previous or following week to make more bookings at this time
- **Save and select more:** click to save the bookings on this screen and make bookings for another child before paying
- **Checkout: click to go** to your basket and confirm you wish to **Pay securely now**

Viewing menus & choices

Please note this feature is only available to parents whose children attend schools which have opted to send meal information from the school canteen to ParentPay

Go to **View menus & choices** in the **'I want to…'** area to the left of your screen.





View menus

- **Event time:** defaults to lunch time
- **Week commencing:** choose the week to view the child's school menu
- Click **Show menu**
- Click on the **Make bookings** button to make bookings at this time

Viewing existing / past / future bookings for a child

The **'Dan's menu for the week beginning 20 Feb 2012'** area in the screen shot opposite shows Dan's booked meals that week.

Click **'View previous week'** or **'View next week'** to go to the date you wish to view

