



- 1) **Registration** - The new registration process makes setup simple by walking users through initial features with helpful instructions as they go. Users are prompted to complete important steps such as adding students and staff members, payment methods, and notifications before entering the Dashboard. This ensures everything is set up and ready to go before the first payment is made.

Before:



After:



# 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](#)

- 2) **Dashboard** - The new Dashboard landing page displays a summary of added students and staff. Users will also see meal and fund account balances and available fees depending on what the district offers. The Dashboard also allows users to add money to meal and fund accounts as well as make fee payments in just a few clicks. Alongside the Dashboard is the new Menu, which allows users to navigate each page for easy access to the many features offered by the site.

Before:



Now! Complete my Meal Application

English(US)

\$0.00

Messages

User

Help

All Students

Mallory Smith

Alexandra Wilson


Manage Students/Patrons

+ Add Student / Patron

District Name	Student Id	School Name	First Name	Last Name	Grade	Active	
Castaic	430002882	Castaic Middle	Mallory	Smith	8	Yes	
Castaic	410002976	Castaic Middle	Alexandra	Wilson	8	Yes	

Back

After:



English(US) \$0.00

Dashboard

Alexandra Wilson

Meal

Balance	Bonus Balance	Action
\$0.00	\$0.00	

Fees

All Fees

All Fees

Search

Fees

School Fees for Jan 2020


Fund Account


Account Name	Balance	Action
After School Program	\$0.00	

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- 3) **Reports** - Viewing reports in PaySchools Central has never been easier. From the new Menu, users can access reports and view meal and fund account activity. Users now have the ability to view many types of reports available in a drop-down menu. In addition, the format of the reports now matches exactly what is displayed in the administrative site, PaySchools Admin. This means users will see identical report data and format, which means fewer phone calls to the food service department. Everybody wins!

Before:

 Report

 Meals ^

Patron Meals Activity

 General ^


Patron Fund Account Activity

### Report : Patron Meals Activity


Patron Name

Select your patron ▼

From Date

mm/dd/yyyy 

To Date

2/7/2020 

Generate Report

Back

After:

The screenshot displays the 'Reports' section of the PaySchools Central interface. It features two main report generation sections: 'Meal Report' and 'Fund Account Report'. Each section contains three dropdown menus for 'Select Report Type \*', 'Select Student / Staff \*', and 'Date \*' (set to '30 days'). Below these are two orange buttons: 'CREATE PDF REPORT' and 'CREATE EXCEL REPORT'. The 'Fund Account Report' section also includes a 'Return To Dashboard' link. The footer contains links for 'Privacy | Terms | Help' and a copyright notice: 'Copyright© by PaySchools - Version: 2020.02.07'.

## Reports

### Meal Report

Select Report Type \*

Select Student / Staff \*

Date \*  
30 days

CREATE PDF REPORT

CREATE EXCEL REPORT

### Fund Account Report

Select Fund Account \*

Select Student / Staff \*

Date \*  
30 days

CREATE PDF REPORT

CREATE EXCEL REPORT

[Return To Dashboard](#)

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- 4) **Auto-Replenishment and Notifications** – We understand parents have busy lives and always want to ensure their children have funds in their meal accounts. That's what makes the Auto-Replenishment and Notification features so important. As an update in PaySchools Central, changes to Auto-Replenishment as well as Notifications are saved automatically rather than manually. This ensures notifications will be sent in a timely manner and auto-replenishment will trigger consistently.

Before:

Auto Replenishment - Meal

Instructions

Student Name	Balance Level	Amount To Add	Stop Payments After	Payment Method	Turn On	Status
William Smith	\$5	\$10	2/8/2020	Select Payment	OFF	
Alexander Wilson	\$5	\$10	2/8/2020	Select Payment	OFF	

Save

Back

After:

## Auto Replenishment

All Students

Instructions

Meal Account

**Chase Wilson** Turn On ☒ Status

Account Balance\* \$26.5 Balance Level\* \$10

Amount to Add\* \$10 Stop Payments After\* 2/28/2020

Payment Method\* My Checking Ac...

SAVE

**David Wilson** Turn On ☐ Status

Account Balance\* \$285.45 Balance Level\* \$5

Amount to Add\* \$10 Stop Payments After\* 2/8/2020

Payment Method\* My Checking Ac...

SAVE

VIEW ALL HISTORY

TURN OFF ALL AUTO-REPLENISHMENT

[Return To Dashboard](#)

- 5) **Payment History** - The newest version of the Payment History is full of new filters and searching capabilities. Users can now see their full payment history on the same page, whether it's for a meal account, fund account, or fee payments. If users would like to see a single type of payment history, they can apply a payment type filter as well as a date range using drop-down menus. They can then email the report to themselves or download the report as they have in the past.

Before

Payment History								From Date:	1/8/2016	To Date:	2/7/2020	Filter
TransactionID	Name	Description	Amount	ICF?	Payment Method	Status	Date					
No items to display.												

Back



After:

# Payment History

Type

All

Date

30 days

Name	Class Room	Class Room
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

[Reset All](#)

CREATE PDF REPORT

CREATE EXCEL REPORT

[Return To Dashboard](#)

- 6) **PaySchools Central and Mobile Similarities** - No computer? No problem! PaySchools Central's display and functionality is consistent across all devices, such as computers, phones, and tablets. Users can now register, add payment methods and students, run reports, and set up auto-replenishment settings on mobile devices and tablets. New and pre-existing users will never have to use a computer to access the full capabilities of PaySchools Central.