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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 in 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.

3) Review the User Agreement and check the box before clicking **REGISTER**.

4) Click **RETURN TO LOGIN** 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

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

2) Click **SECURE** to continue.

Add Student and/or Staff

1) You have the option to **SKIP** this step and add your students/staff later via the Dashboard.
2) Add your student(s) and staff by filling in all the required fields and clicking [ADD STUDENT / STAFF].

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 to provide student information for privacy reasons.
3) Once students and staff are added, they will appear at the top of the page where you can remove and manage your students/staff.

4) Click **CONTINUE** once you’ve added all of your students and/or staff.

5) 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.

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

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.
Add Payment Method

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 *

Month/Year *

CVV Number *

Credit Card Processing terms and Conditions:
1. I authorize CP-DBS, LLC dba PaySchools, as owner and operator of payschoolcentral.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.

ADD PAYMENT METHOD

Skip

Back
3) Please read the Terms and Conditions for each payment method and check the box to agree. Click 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.
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!
One of PaySchools Central’s newest 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.

You can access the Menu from any page on the site. Click on the button 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.

![Meal card screenshot]

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.

![Auto Replenishment screenshot]

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

5) An orange toggle will appear, which indicates auto-replenishment is on.

6) Once your auto-replenish settings have been saved, you will see a status icon next to the Turn Off switch. 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 turn off auto-replenish, simply click the orange toggle.
One-Time Lunch Payment

1) To make a one-time lunch payment, go to the Dashboard and click the cart icon 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 **CONTINUE**.

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

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.
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.
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 Payment

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 Payment

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 Add To Cart.
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 **ADD/UPDATE SCHEDULE** to schedule your fee payment.

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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 **Messages** option in the Menu.

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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 ▼. 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.

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 **ADD TO CART**.

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 **CONTINUE**.

7) Review the **Terms and Conditions** and put a checkmark in the box before clicking **MAKE PAYMENT**.

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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 **SAVE**.

4) Agree to the Terms and Conditions by putting a check mark in the box and clicking **SAVE**.

5) An orange toggle will appear, which indicates auto-replenishment is on.

6) Once your auto-replenish settings have been saved, you will see a status icon next to the **Turn Off** switch. 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 turn off auto-replenish, simply click the orange toggle.
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 🔄.

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.

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 Transfer.
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.
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.

2) If you’d 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.

3) If you’d like to download a PDF or Excel version of your payment history report, click CREATE PDF REPORT or CREATE EXCEL REPORT.

4) Once you’ve 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.

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 or . 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.
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 EMAIL ME or TEXT/CALL.
Email

1) The 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 Activation page.

2) Click to submit your changes.
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.

2) For either the email or text/call option, click to submit your changes. You will see the following pop-up, which indicates you successfully created a new password.
Change Your Account’s Associated District

If all the student and staff members tied to your account are switching to a new school district that also utilizes PaySchools Central, you won’t have to start from scratch and create a new account.

Remove Current Student and Staff Members

1) To view your current patrons, open the Menu and select the Your Students option.

2) To remove any or all your students and staff, simply click the icon in each card and click Save to confirm.

3) Once you’ve removed all students and staff members, your account will no longer be associated with any school district.

4) You will need the new patron ID numbers from the new school district in order to re-add student and staff members to your account. The patron ID numbers will be different from your old district, which is why you need to re-add them.

5) Click Add Student / Staff. Fill out the necessary filters, such as the new state, district, student ID number, name, and relationship before clicking again.
6) You will see a message at the bottom of the screen which will tell you whether your student or staff member was successfully added.

7) If you are having trouble adding your student or staff member, please call your school directly for assistance.
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 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 **Continue To Dashboard**. 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.

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