MySchoolBucks

Parent User Guide

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## MySchoolBucks Parent User Guide

MySchoolBucks is an award-winning service offered by Heartland Payment Systems, Inc. Heartland Payment Systems is known for fair, fully disclosed pricing and empowering our customers to take control of their payment processing costs.

Since being introduced a number of years ago, MySchoolBucks has become the product of choice for thousands of schools throughout the United States. Whether paying for chemistry lab fees, purchasing books, buying athletic tickets, or simply paying for school lunch, MySchoolBucks gives parents the peace of mind when it comes to their children's school purchases.

With MySchoolBucks, parents are able to register for an account and view information for free. Parents are also able to view account balances or recent purchases in the school cafeteria, add money to their student's account, and set up low balance alerts through this award-winning, parent friendly system.

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Creating a Parent Account in MySchoolBucks

All new parent users must click **SIGN UP TODAY** and follow the on-screen instructions to establish their account.
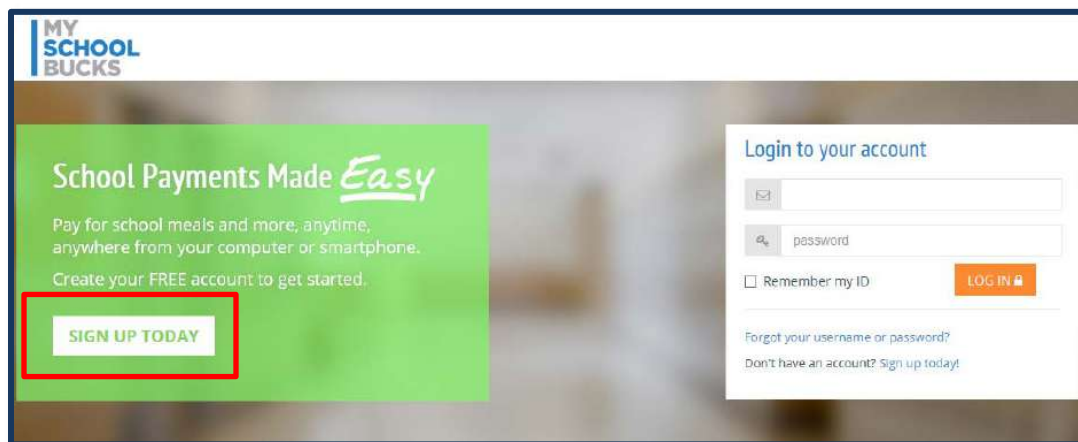
The registration process will require you to select the state, followed by the district, in which your students attend, your first and last name, email address, and password. Your email address will be your username when logging in.

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You are also required to select two security questions and fill out the answers. Once all information is entered, click **CREATE ACCOUNT**. A welcome email will be sent to the email address confirming that your profile was created.

Username and Password Recovery

If you have already created an account but have forgotten your login credentials, you can recover your profile either by entering the email address associated with your account or the mobile phone number associated with the account. To recover your profile, first click **Forgot your username or password?**

If you would like your information sent to you via text message, click **Mobile Phone #**, enter the phone number associated with the account, and click **Continue**. If you would like your information sent to you via email, click **Email Address/Login ID**, enter the email address or login ID associated with the account, and click **Continue**.

Note: You must validate your mobile number before it may be used for password recovery.

A text message or email will be sent to you. Click **Finish** to return to the login screen.
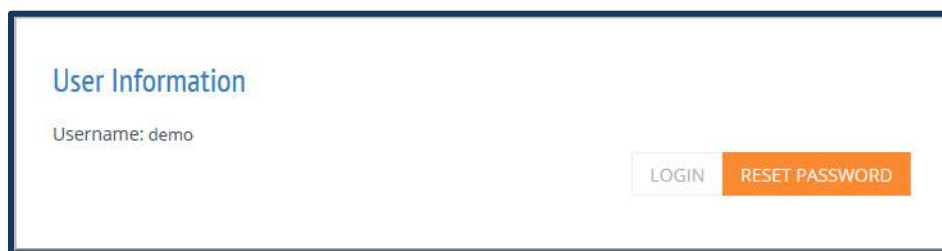
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MY SCHOOL BUCKS

The email will contain a link. Click the link to begin recovering your profile. You may be presented with the security questions set up during your account creation. Enter the answers to the questions and click **Recover Profile**.
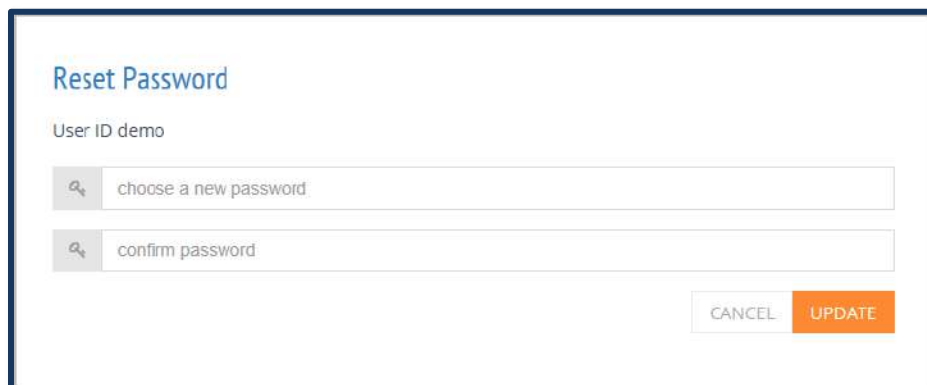
Security Questions

What is your favorite color?

? |

What is your pet's name?

?

CANCEL   RECOVER PROFILE

After correctly answering the security questions, you will be provided with your username. If you remember your password, click **Login** and enter your password. If you do not remember your password, click **Reset Password**.

User Information

Username: demo

LOGIN   RESET PASSWORD

To reset your password, enter a new password in the top field and re-enter it in the field below. Then, click **Update**. Note that the password must be at least 6 characters
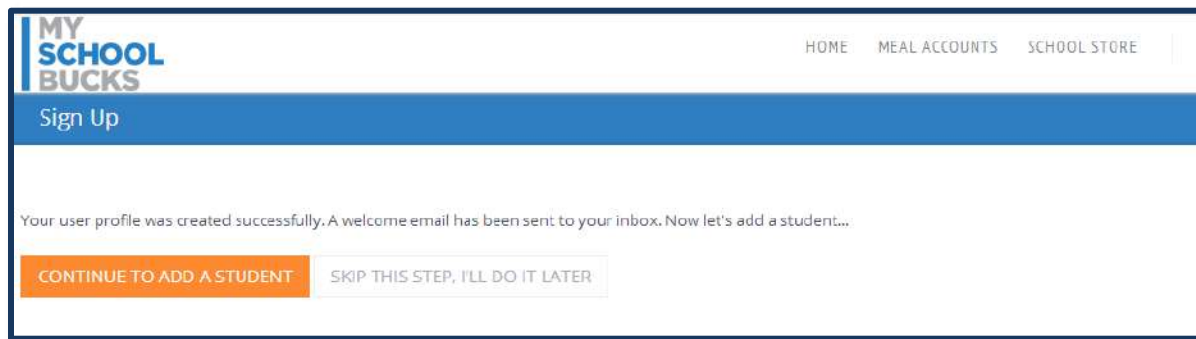
Reset Password

User ID demo

🔑 choose a new password

🔑 confirm password

CANCEL   UPDATE

Adding a Student

Adding a Student on a New Account

After creating your account, you will then have an opportunity to add a student. You can choose to skip this step until a later time.

The student's district will automatically be populated. If a new District needs to be added, click the down arrow at the top of the screen to add the new district.
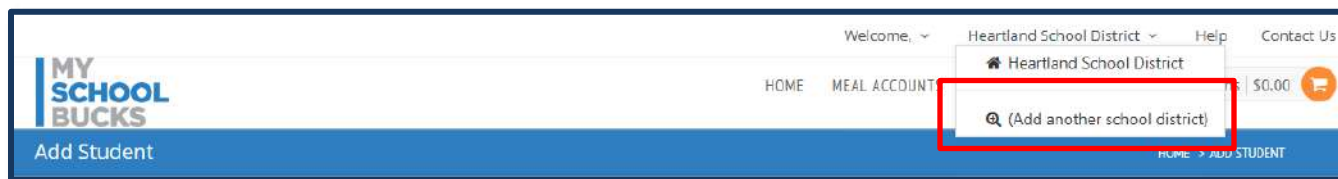
To add a student, enter the student's school along with their first and last name, date of birth, or student number and click **FIND STUDENT**.

Note: The information required to locate the student is dependent upon the individual district's settings. Some districts may require both the birthdate AND the student ID, while others may only require the birthdate OR the student ID.

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Add Student

To add a student to your account please enter their name and identifying information.

Heartland School District

| Challenge Academy | ▼ |

Note: If your child attends school in a different school district please use the district selector at the top of the page to switch.

| 👤 | First Name |

| 👤 | Last Name |

One of the following is required to validate your student

| 🗓 | Birthdate (mm/dd/yyyy) | ▼ |

- or -

| 🏷 | Student Number |

Don't have your child's student ID?

CANCEL   FIND STUDENT

If the student is not able to be found, you will see the below message.

If you received this message, it likely means that some information was entered incorrectly. If there are no errors in the student information and the student is still not found, you will need to contact the school to verify your student is in their records.

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Once the student is found, you will have the option to request a "low balance" email be sent to your email once the student's balance falls below a dollar amount that you choose. If you do not want a low balance email, simply un-check the box and click **ADD STUDENT**.

MY SCHOOL BUCKS   HOME   MEAL ACCOUNTS   SCHOOL STORE

Add Student

Add Student

First Name: Lavell
Last Name: Gilmore
Grade: 8

☑ Send email when meal account balance falls below:

$ 10.00

CANCEL   **ADD STUDENT**

Once the student is added, you will see the below confirmation. You can click **ADD ANOTHER STUDENT** to add another student or **FINISH** to complete the process.

MY SCHOOL BUCKS   HOME   MEAL ACCOUNTS   SCHOOL STORE
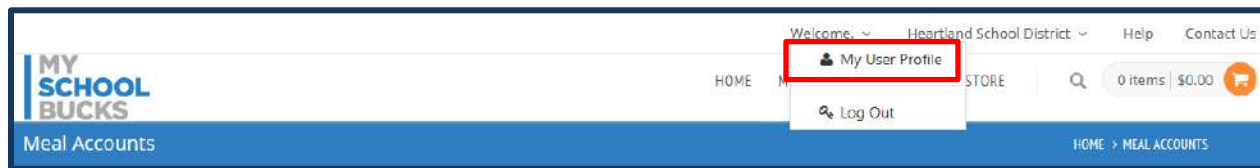
Add Student

The student you selected has been successfully added to your household.
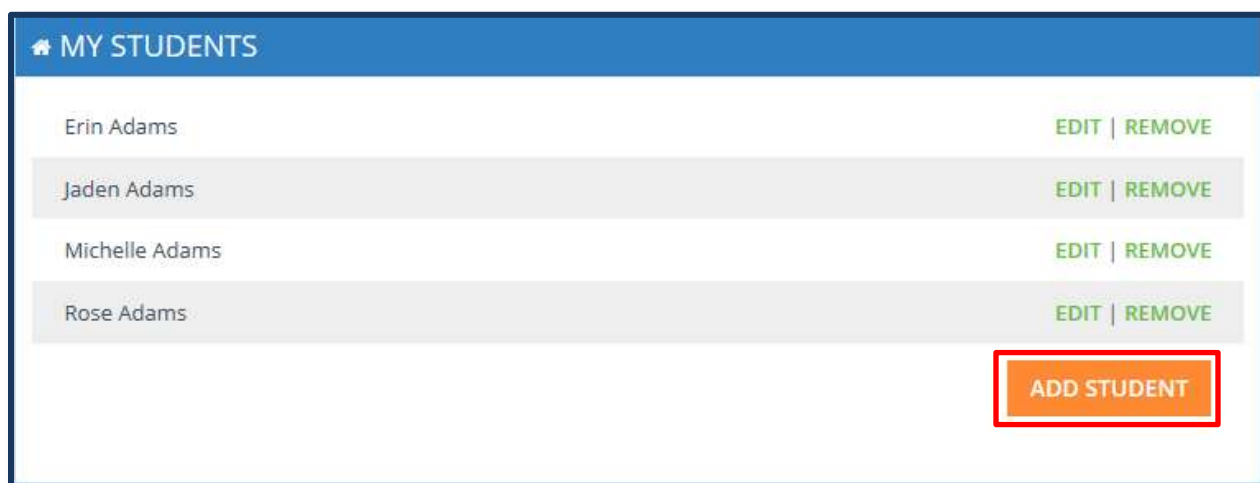
ADD ANOTHER STUDENT   FINISH

Adding a Student to an Existing Account

To add a student to an existing account, under the Welcome drop-down menu, click **My User Profile**.

Under My Students, click **ADD STUDENT**.

From here, the process is identical to [adding a student on a new account](#).

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Parent Resources

User Profile

To review or change account information such as contact information or membership settings, from the Welcome drop-down menu, click **My User Profile**. You will also be able to click **Log Out** from here.

To edit information on this page, click **EDIT** next to the information you would like to update. For example, if you would like to change your password, click **EDIT** in the Password row under My Login. To edit the security questions used in case you forget your password, click **EDIT** next to Security Question #1 or Security Question #2.

To associate an account with a name, cell phone, and an email address, click **EDIT** next to Name, Mobile Phone Number, and Email Address, respectively. In addition to having the option to send low balance emails, parents may also receive emails associated with their student store orders, such as receipts and refund confirmations, and promotional emails with updates and news about MySchoolBucks. Parents may also opt to send text messages to their phones to be updated with similar information.

MY CONTACT INFO

Name:	Sue Parent1		EDIT
Mobile Phone Number:	---		EDIT
Send text messages?	Yes		EDIT
Email Address:			EDIT
Send confirmation of payment?		Yes	EDIT
Send feature updates, news and promotional emails?		Yes	EDIT

Under My Students, in addition to editing, there are options to remove and add entries. To remove a student, click **REMOVE** next to the account you would like to delete. To add a student, click **ADD STUDENT**.

MY STUDENTS

Name	Low Balance Threshold	
Erin Adams	$10.00	EDIT | REMOVE
Jaden Adams	$10.00	EDIT | REMOVE
Michelle Adams	$10.00	EDIT | REMOVE
Rose Adams	$10.00	EDIT | REMOVE
		ADD STUDENT

Under My Membership, your current membership is displayed. A membership allows you to make purchases without having to pay the Program Fee each time. Click **Update Membership** to join or decline a membership.

MY MEMBERSHIP

Standard Membership
Pay-As-You-Go

UPDATE MEMBERSHIP

Under My Billing Accounts, in addition to editing, there are options to remove and add entries. To remove a billing account, click **REMOVE** next to the account you would like to delete. To add a billing account, click or **ADD ACCOUNT**.

MY BILLING ACCOUNTS

Account Name	Expires	
Visa ending in 1111	01/2017	EDIT | REMOVE
Checking Acct ending in 6992	---	EDIT | REMOVE

ADD ACCOUNT

Under My School Districts, the school districts associated with your students' accounts are displayed. Your primary school district is indicated by whichever district has a yellow star under Primary. The students under your account associated with the district are listed under Students. Click Add School District if you need to add another school district. Even if all students associated with your account go to the same district, you may need to add a district in order to access another district's student store, for example.

MY SCHOOL DISTRICTS

District Name	Primary	Students
Heartland School District	☆	Erin, Jaden, Michelle, Rose

ADD SCHOOL DISTRICT

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Email Preferences

You can sign up for email notifications to inform them when your student's balance falls below a designated amount or after an order is placed. To sign up for low balance emails, click **EDIT** under My Students next to a student account, select **Send email when meal account falls below**, and enter a low balance amount. Click **SUBMIT** to confirm the changes.

Edit Student

First Name: Erin
Last Name: Adams
School: Heartland Primary School
Grade: K
School: Heartland Primary School
Grade: K

☑ Send email when meal account balance falls below:

$ 10.00

CANCEL   SUBMIT

To sign up for notifications for when a payment has been made, click **EDIT** under My Contact Info next to Send Confirmation of Payment. Then, under Send confirmation of payment, click **Yes**. Click **Update** to confirm the changes.

Edit User Info

First Name

Last Name

E-mail Address

Send confirmation of payment?
●Yes ○No

CANCEL   UPDATE

Downloads

You can access MySchoolBucks digital applications by scrolling to the bottom of the page. Currently, mobile applications for iOS, Windows Phones, and Google Play are available to download. These resources provide you with fast and easy access to your account.


Meal Accounts

The Meal Accounts page is the landing page for parents every time they log in to their accounts. Here, you can view student balances, active scheduled payments, and recent payments.

All students that have been added to your account will be displayed here. Some students will have an icon next to their name. A rounded arrow icon indicates that the student is set up on an automatic payment plan. A trophy icon indicates the student is part of a membership program.

Also displayed is the district announcement. District administrators can enter custom announcements or notes for parents in their district to view after logging in to their accounts.
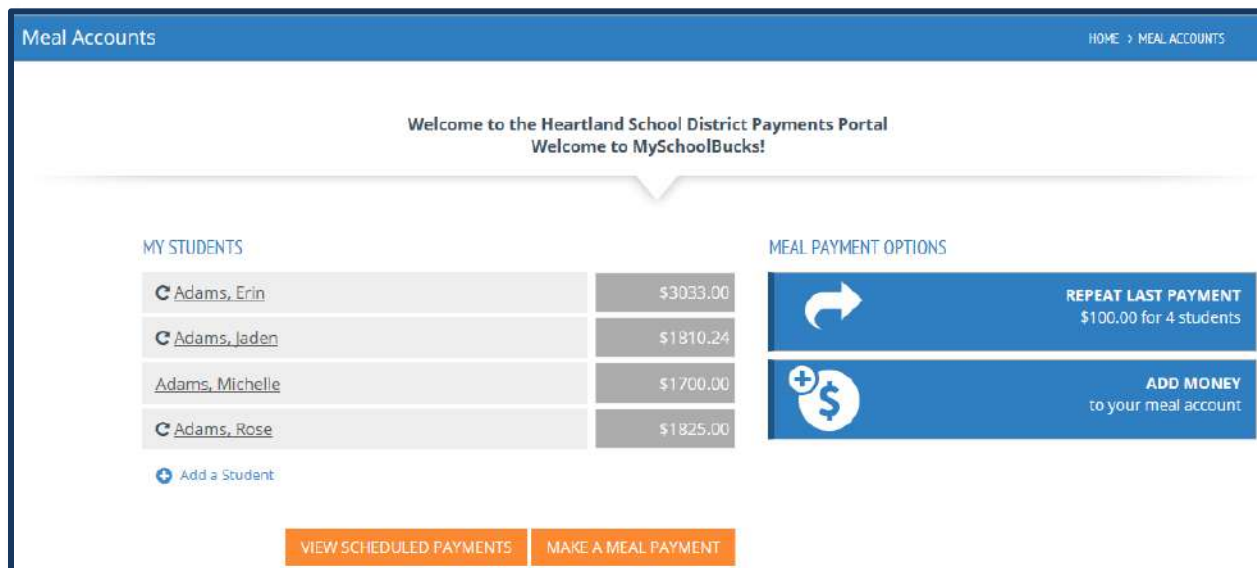
Cafeteria Meal History

The Cafeteria Meal History page displays a list of purchases and account activity for students. Some districts utilize software that is compatible with the running balances feature in MySchoolBucks. However, many district cafeteria purchases will only display activity such as purchases and deposits.

In addition to cafeteria purchases, this page also has tabs that display recent payments and scheduled payments. Click the **Recent Payments** tab to view payments made recently to your students' accounts. Click **Scheduled Payments** to view payments that are pending.

Prepayments should display in cafeteria purchases and increase the student's balance within 2 business days after the date of the prepayment.

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Make a Payment

To process a prepayment, select the "Make a Payment" option in the Meal Accounts drop-down menu. This will navigate you to the Place Order page.
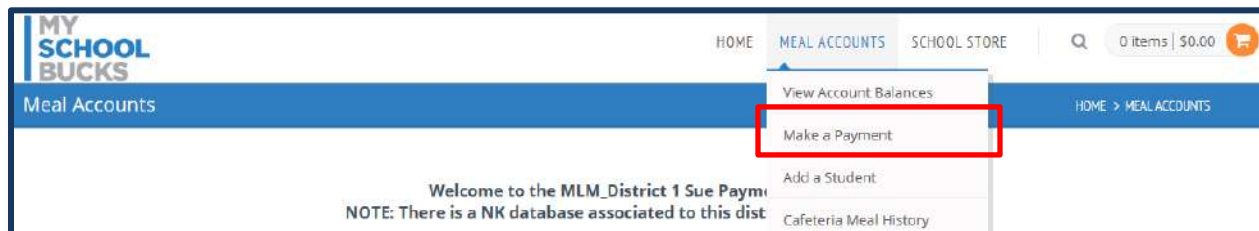
You will be able to select a store such as Cafeteria Meal Payments or School Supplies. This will depend on the stores that have been set up for the school district that the student attends. If there are only cafeteria payments available, you will automatically be directed to the cafeteria payment options.

To make a payment, you will need to first select an amount to pay within the individual school districts' maximum payment limits. This is typically a range of $1 to $120. However, this limit may vary depending on the district's agreement with MySchoolBucks.

Note: On this screen, amounts in red have fallen below their "low balance" amount. Once the balance is funded, the box will turn gray.

Next, select a payment method, either **eCheck** or **Credit Card**. When writing an eCheck, select the checking account from the drop-down menu. When using a credit card, select a credit card from the drop-down menu. If the preferred payment method does not appear in the menu, click **Enter a new checking account** to enter a new eCheck account or **Enter a new credit card** to enter a new credit card.

When making a payment to a lunch account, you have the option to make the current payment an automatic one. The selection is defaulted to **No**. This means that the current payment is made one time at the time of purchase. If you click **Yes**, you can set the current payment to recur either when the account falls below a certain balance or at sent timed intervals, such as every week after the payment. Payments can be made to stop on a certain date or continue going unless you manually cancel the payment.

When finished making the order, click **Place Meal Order** to place the order.

At this point, the order will be placed. If you selected the option to receive an email notification when an order is placed, the notification will be sent at this time.

Place Meal Order

Your order was accepted. Thank you!

PLEASE NOTE: The charge will appear on your statement as Sue MLM District Absorbed Fee Model.

Your reference code is 'AQ4QVONRICANH84'. If you have provided an email address you will receive an email confirmation.

You may check Order History on this website at any time for order status.

Press the Print Order button to print a copy for your records.

[PRINT ORDER]   [FINISH]

My Order History

My Order History contains all orders placed through MySchoolBucks. To open the My Order History page, click **My Order History** under the Home drop-down menu.

My Order History includes both one-time prepayments and scheduled prepayments. From this location, you can view the details of past payments such as the date that the order was placed, the frequency of the order, and the billing account that the order is being billed to. Check the order details by clicking **View Order**. You can also print orders by clicking the printer icon.

Recent Payments History

To view all payments processed from your account through MySchoolBucks, select **Recent Payments** from the Home drop-down menu.
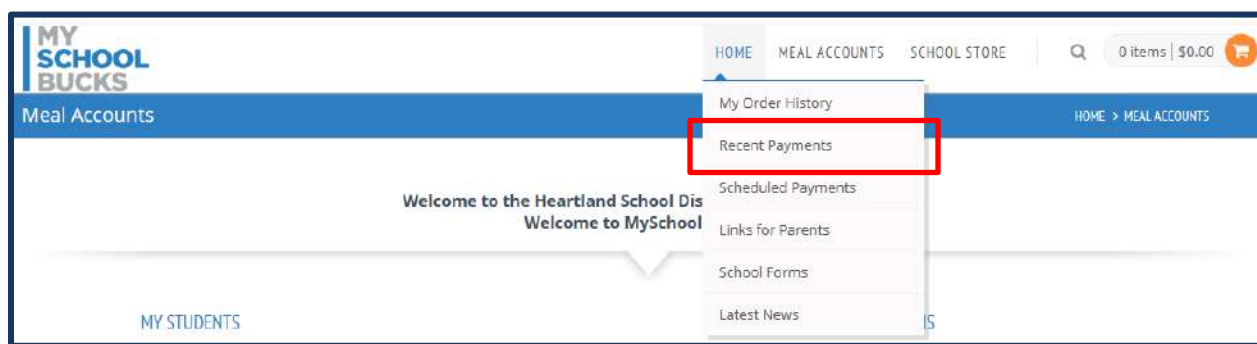
The Recent Payments page will display the most recent payments made to the school. Successful payments display in black text, and declined or returned payments are displayed in red text. To view all available payment records for a student's account, click **View All** under their account name.

Note: Payments made directly to the school or through any other service will *not* display here.

To collapse the payment list back to only recent payments, click **View Less**.

Scheduled Payments

The Scheduled Payments page lists the payments that are scheduled to process in the near future. These payments are organized by student on the account. To view scheduled payments, select **Scheduled Payments** from the Home drop-down menu.
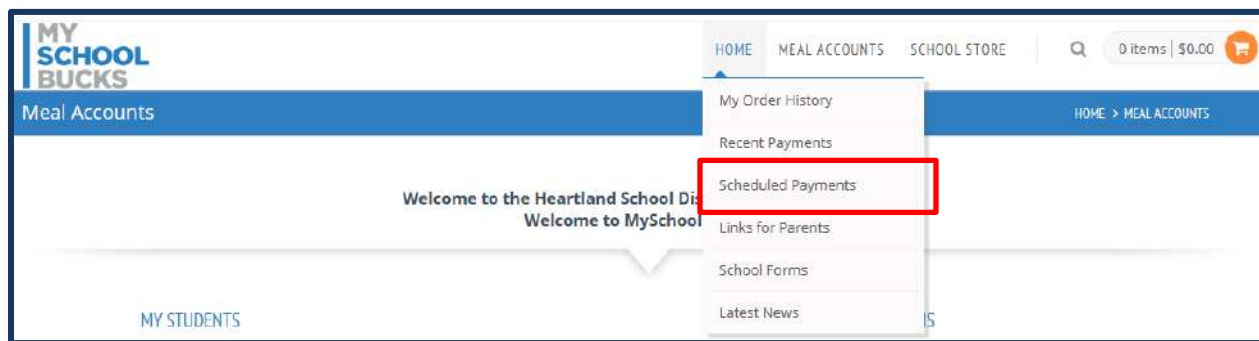
From this page, you can view scheduled payments on your account. In addition, you can also cancel a payment or change the billing information associated with the payment. To cancel or change the billing information on a payment, first click **View/Edit** next to the payment you would like to modify.

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To cancel the order, click **Cancel This Order**. Click **Yes** on the next screen to confirm the order cancellation. To change the payment method used to complete the scheduled payment, click **Use a Different Billing Acct**.

Order

CANCEL THIS ORDER **USE A DIFFERENT BILLING ACCT**

ID:	XO4N7SY9SFKAWNW
Date:	Jun 26, 2014 5:28:44 PM
Status:	active
School District:	Heartland School District
Store:	Food Services Store
Name:	Account, Demo
Email Address:	nate.schunk@e-hps.com

Name	Student	Unit Price	Quantity	Total Price
Cafeteria	Adams, Erin	$45.00	1	$45.00

* Scheduled to pay $45.00 when balance <= $10.00

Subtotal:	$45.00
Program Fee:	$2.00
Grand Total:	$47.00
Bill to:	Visa ending in 1111

From here, choose the payment method you would like to use for the payment and click **Update**. Note that new payment methods cannot be added from this screen.

Please select a billing account to use to apply the payment.

VISA ENDING IN 1111 (EXPIRES JAN 2017) ✔

DANELLE
1620 W FOUNTAINHEAD PARKWAY
TEMPE , AZ 85283

CHECKING ACCT ENDING IN 6992 (EXPIRES JAN 2015)
✔

MOBILE BANK ACCT
1234 TEST DR
#4
TEMPE , AZ 85251

To add a new billing account please first choose My User Profile from the menu then return here to update the schedule.

CANCEL **UPDATE**

One-time prepayments with the status of "Closed" cannot be cancelled or voided. If you are requesting a refund and the order has already been closed, you will need to obtain the refund directly from the school.

FAQ and Contacting Support

Users have access to the Frequently Asked Questions as well as the parent support phone number at the bottom of every page in MySchoolBucks by clicking **Help**. You may also send Support Requests and submit User Feedback through the **Contact Us** option in the top right corner or at the bottom of the page.

MyLunchMoney Migration

Parent users migrating from MyLunchMoney to MySchoolBucks will notice options in addition to those associated with other MySchoolBucks users. These features are meant to help provide a smooth transition from MyLunchMoney to MySchoolBucks.
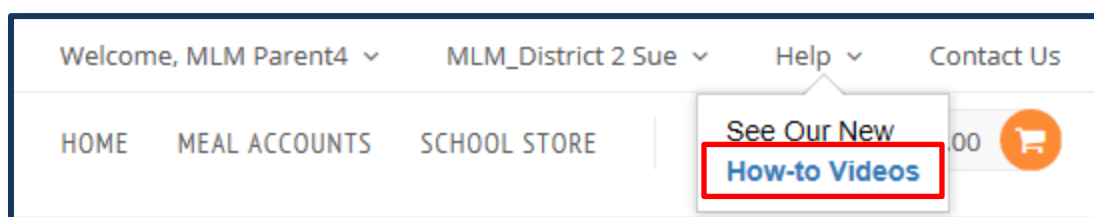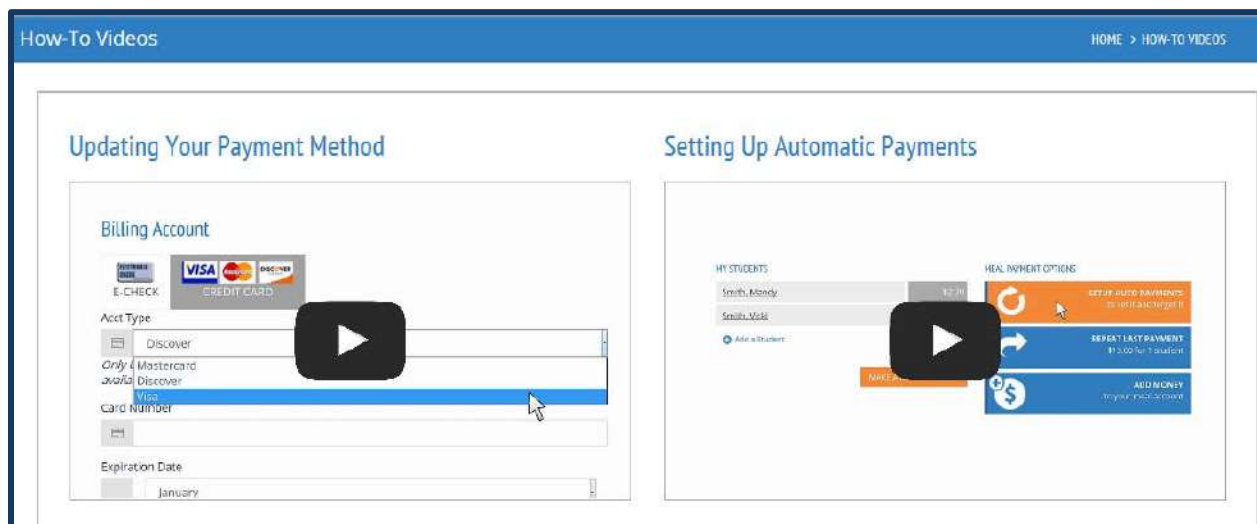
How-To Videos

When a new user migrating from MyLunchMoney logs in to MySchoolBucks, a pop-up will appear under the Help menu. Click the link in the pop-up, **How-to Videos**, to watch videos that detail how to navigate and use MySchoolBucks.
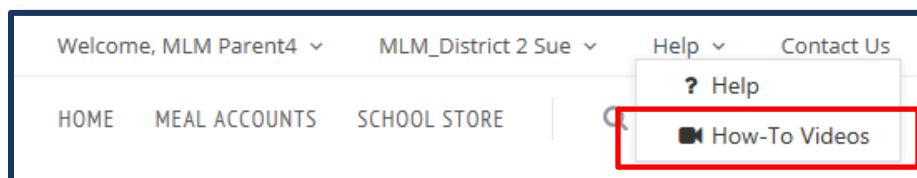

On the How-To Videos page, you will see a few videos that detail common tasks for users in MySchoolBucks.

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When finished viewing the videos, click **Let's Get Started** to return to the MySchoolBucks homepage and begin using MySchoolBucks.

LET'S GET STARTED
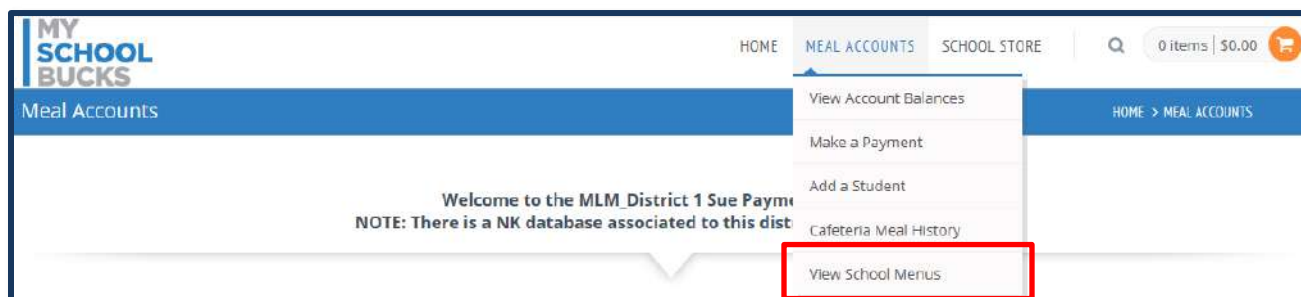
If you ever need to access the how-to videos again, they are available under Help.

Welcome, MLM Parent4 ∨   MLM_District 2 Sue ∨   Help ∨   Contact Us

? Help

◼ How-To Videos

HOME   MEAL ACCOUNTS   SCHOOL STORE

View School Menus

Parents migrating from MyLunchMoney may have districts that still post school menu information to the MyLunchMoney site. Rather than have to navigate to two separate sites, MyLunchMoney users can find their school menus through a link on MySchoolBucks. To access MyLunchMoney school menus, click **View School Menus**.

MY SCHOOL BUCKS

HOME   MEAL ACCOUNTS   SCHOOL STORE   🔍   0 items | $0.00 🛒

Meal Accounts   HOME > MEAL ACCOUNTS

View Account Balances

Make a Payment

Add a Student

Welcome to the MLM_District 1 Sue Paym
NOTE: There is a NK database associated to this dist   Cafeteria Meal History

View School Menus

Upon clicking View School Menus, the MyLunchMoney user should see their school's menu on the MyLunchMoney site.

You can also access a student's MyLunchMoney school menu by clicking the utensil icon next to their name on the My User Profile and View Student Balances pages.

Meal Controls

For parent users migrating from MyLunchMoney, MySchoolBucks has a feature that is similar to the meal control settings available on MyLunchMoney. When adding a new student or when editing a student from the My User Profile page, the Meal Controls feature is available for you to set spending limits for the student being added or edited.

Important: Meal Controls settings are on a *per student* basis, so you need to set controls for each individual student.

Under Daily Spending Limit Amount, enter the amount of money you want to allow your student to spend each day. Under Weekly Spending Limit Amount, enter the total amount of money you want to allow your student to spend each week. Make sure that the amounts in these fields are within the range shown under Daily Range and Weekly Range.

The Meal Options let you determine if your student is allowed to use cash from their account on a la carte items. If you select **Cash Account for meals/a la carte**, your student will be allowed to spend account money on a la carte items in addition to meals. If you select **Cash Account for meals only**, your student will only be allowed to spend account money on meals.

Support

For additional support, please contact Technical Support between the hours of 8 AM EST and 5 PM EST at 1-855-832-5226.

You may also contact customer technical support by using our support request form.

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