



## Greenholm Primary School

### 'How to' guide for parents when using Parent Pay.

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**Please note: If you are still having difficulty, or require any additional information, please contact the school office by calling 0121 464 6321.**

## What is Parent Pay?

Parent Pay Limited is a privately owned software company offering a complete solution for income management for schools in the UK. Their unique web application Parent Pay® allows parents to make secure online payments by credit and debit card.

Parent Pay created the market for cashless payments in schools. They are now firmly established as the UK market leader for online parent payments and income management for schools.

Offering advice to the Department for Education and government agencies, Parent Pay is recognised as the leading expert in this rapidly growing sector. They now provide services to over 2,000 schools across 165 local authorities. This year they will help schools collect and manage £100 million from parents.

In 2002 the business was founded by a working parent and ex-teacher trying to help a local school and make life easier for other parents. Every feature developed by Parent Pay has been driven by their customers. Their school online payment system puts schools' and parents' needs at the centre of everything we do.

Parent Pay makes cashless payments in schools easy and delivers real-time data to their users wherever they are based, using a standard Internet browser. This includes parents, schools, the local authority and catering staff.

Greenholm Primary School started using Parent Pay for school trips in May 2013. The 2013/14 academic year will see Parent Pay being used for nearly all payments; this will include dinners, BASC, trips and music lessons.

## How to activate your account

Every child will have been issued with a unique username and password. These are generated by Parent Pay and are handled by the school office.

Once you first log in you will be asked to change the username and password, at this point the office will no longer be able to access the details. If you forget your log in details after you have activated the account, you will need to contact Parent Pay directly to retrieve the information.

When you have your child's initial log-in details, you will need to go <http://www.parentpay.com/>

The screenshot shows the ParentPay website homepage. At the top is the ParentPay logo and a navigation menu with links for Home, About Us, Parents, Schools, Authorities, Caterers, Support, and Contact Us. A search bar is also present. The main content area features a large orange banner for a 'The latest results are in...' report, with a 'DOWNLOAD' button and a link to 'Download the Free LACA/ParentPay School Meals Research Report'. Below this is a section titled 'I want to know more about...' with links for Parents FAQs, Parents support, Parent account activation, The New ParentPay for Schools, and PayPoint cash collection. At the bottom, there are three columns: 'For Parents', 'For Schools', and 'For Authorities', each with a representative image and a brief description of the service's benefits for that group.

Once on the website you will need to click the **Activate** button (shown below)

This is a close-up of the 'Account Login' form. It contains two input fields: 'Username' and 'Password'. To the right of the 'Password' field is a 'Login' button with a blue play icon. Below the 'Login' button is a link for 'Forgotten Password'. A red rectangular box highlights the 'Activate' button, which is located below the 'Login' button.

On the page below you will need to enter your child's details (as supplied to you from the school)

ParentPay

Home About Us Parents Schools Authorities Caterers Support Contact Us I am looking for...

**Parents**

- Parent Login
- Activate**
- Parents Support
- Parents FAQs
- Parent Help Topics
- PayPoint
- Back to school FAQs

**News**

ParentPay launches broadest school meals survey to date  
ParentPay the UK's market leading online payment provider for schools are giving 2 million parents a chance to have

Wauton Samuel & ParentPay launch new development  
Wauton Samuel is the latest school MIS provider to enhance their integration with ParentPay. The new development build

The New ParentPay for Schools launches at LACA 2013  
UK Market leader demonstrates the latest development in school online payment systems with a brand new user-centric task

You are currently in: Home > Parents > **Activate**

## Activate

**Activate account for online parent payments**

ParentPay lets you make online payments to school or pay cash at local PayPoint stores. Your school must subscribe to ParentPay before you can pay school online.

**Activate to get started**

Activate your account to start making online parent payments.

Your school will send you an activation letter with your unique activation codes. Enter these carefully below. Be careful with UPPER and lower case and don't mix up the letters and numbers.

For child protection reasons ParentPay cannot provide your activation details, only your school.

**Completing activation to pay school online**

To complete account activation you'll need to:

- Enter your activation codes 1 and 2
- Confirm your personal details
- Register an email address (if you have one)
- Choose your new login details

**Your Details**

Please Note fields marked with an asterisk \* are required

**Activation code 1/Username \***

**Activation code 2/Password \***

**Account Login**

Username

Password

Parent FAQs

Parent Support

Cashless Partners

Once you have entered the details click **submit**

## Your Details

Please Note fields marked with an asterisk \* are required

**Activation code 1/Username \***

**Activation code 2/Password \***

On the page that opens, **please enter all the required information.**

The screenshot shows the ParentPay 'Activation' page. At the top, there's a navigation bar with 'Home', 'Pay for items', 'Make bookings', 'Transaction history', 'Menus & choices', and 'Communications'. Below this is a sidebar with 'I want to...' and 'ParentPay support' sections. The main content area is titled 'Activation' and contains two sections: '1. Your personal details' and '2. Register email address'. The first section has dropdowns for 'Title' and 'Date of birth', and text boxes for 'Forename' and 'Surname'. The second section has a text box for 'Email' and a 'Re-enter email' field. A 'Continue' button is located at the bottom of the form.

Click **continue**, at the bottom of the page, when all your details are entered.

Please remember to make a note of your new log-in details.

Once you've clicked **continue** a page confirming your details will open (shown below).

The screenshot shows the ParentPay 'Your account activation settings have been saved' page. The top navigation bar is the same as in the previous screenshot. The sidebar is also present. The main content area is titled 'Your account activation settings have been saved' and includes 'Login details' (username and password), 'Please use these for all future logins', 'Verifying ownership of your email address', 'Your email address', 'Instructions' (a list of steps), 'Troubleshooting', 'Wrong address', 'Junk Mail Filter', 'Blocked by ISP', and 'Contact us'. A 'Continue' button is at the bottom.

Click **continue** once again and that is it. You have successfully activated your account and you can now start using Parent Pay.

Once you have activated, just log in as normal afterwards.

# The home screen explained

The screenshot shows the ParentPay home screen for Greenholm Primary School. The interface includes a top navigation bar, a main content area with several sections, and a footer with promotional banners. Red boxes with numbers 1 through 7 highlight specific areas of the page.

**1** Points to the main navigation bar containing: Home, Pay for items, Make bookings, Transaction history, Menus & choices, Communications.

**2** Points to the user profile area showing: Overview, TEST, Add a child.

**3** Points to the basket status: Basket £0.00 (0 items).

**4** Points to the 'Items due for payment' section, which includes a table:

Due date	Item description	Name	Amount	
-	Dinner Money for Greenholm Primary, Bal: £0.00	TEST	-	<a href="#">Add to basket</a>
24 Sep 2013	Shugborough Hall - Y5	TEST	£15.00	<a href="#">Add to basket</a>
31 Jan 2014	Bell Heath - Y4 Residential, To Pay: £95.00	TEST	£95.00	<a href="#">Add to basket</a>

**5** Points to the 'Lunch meal activity' table:

Date	Taken	Details	Amount
20 Sep 2013	✗	Lunch	-
19 Sep 2013	✗	Lunch	-
18 Sep 2013	✗	Lunch	-
17 Sep 2013	✗	Lunch	-
16 Sep 2013	✗	Lunch	-

**6** Points to the 'ParentPay support' section, which includes links for: Take the tour, What's new?, Browse help topics, Parent FAQs.

**7** Points to the 'Alerts & communications' section, which includes a table:

Date	Subject
19 Sep 2013	<a href="#">Activation email</a>

The bottom of the page features three promotional banners: 'New ParentPay for parents', 'School meals research', and 'Vacancies at ParentPay'.

## The home screen explained – continued

### 1 – Navigation tabs

Use these to navigate around the site. Most of the options are displayed on the home screen.

### 2 – Add a child/ view other accounts

The “add a child” tab will allow you link all of your children onto one account. This is so you don’t have keep signing in and out to pay for different things. Once you have added another child, you can use the left hand tabs to quickly navigate between accounts. How to add a child is explained on page 8.

### 3 – Basket

This works much in the same way as amazon or ebay. Once you have added an item(s) to your basket, you click here to proceed to payment.

### 4 – Items due for payment

This is where all the relevant trips/ clubs that need payment will be displayed. The trips and clubs will be assigned to your child by Mr Barrett. If you pay in the office by cash, the item will be marked as paid on Parent Pay.

The only item that will never move from this box is dinner money. Dinner money will also never show an “amount”. This is because we have opted not to use the dinner register facility on the site. Just click “add to basket” and input the amount you wish to pay, along with a note explaining the payment. How to pay is explained on page 10.

### 5 – Lunch meal activity

Please ignore this box. We have opted not to use the dinner register option on the site. As a result, the function of this menu option will not be relevant.

### 6 – Recent payments

This will show all payments you have made. Any cash payments will also be displayed here.

### 7 – Alerts & communication

This is another box to ignore. The only communication you should receive via Parent Pay will be activation letter. All other correspondence will be done via letters to parents.

## How to add a sibling

**PLEASE NOTE: You do not have to 'activate' the other child's account. You can use the log in details supplied to you from the school to add additional children.**

On the home screen click **add a child**.

The screenshot shows the ParentPay interface for Greenholm Primary School. At the top, there's a navigation bar with links like Home, Pay for items, Make bookings, Transaction history, Menus & choices, and Communications. A sidebar on the left titled 'I want to...' contains various options like 'Go to homepage', 'Pay for items', 'Make bookings', etc. The main content area features a table of 'Items due for payment' and a 'Lunch meal activity' table. A red box highlights the 'Add a child' button in the top right corner of the main content area.

Input your other child's log in details.

### Add a child to your account

You can add another child to this account by merging your login details below.

**IMPORTANT:**

- If currently logged into more than 1 account, please log out of **all accounts**

Next, log back in to **the account you wish to continue using**, this username and password will remain active

Return to the **Add a child to your account** page

- You will either have Username and Password or Account activation codes for the account you are adding

Enter these below, and click **Search**

- Click **Add to my account** to confirm

Activation code 1 / Username:

Activation code 2 / Password:

**IMPORTANT:** Please do not log into your other account whilst merging your logins; you will be logged out of the system and will need to start again.

Once you have clicked **search**, your other child's details should be displayed (as seen below)

### Add a child to your account

You can add another child to this account by merging your login details below.

**⚠ IMPORTANT:**

- If currently logged into more than 1 account, please log out of **all accounts**

Next, log back in to **the account you wish to continue using**; this username and password will remain active

Return to the **Add a child to your account** page

- You will either have Username and Password or Account activation codes for the account you are adding

Enter these below, and click **Search**

- Click **Add to my account** to confirm

**Adding from account: OGOJNNBA ( TEST2)**

School	Pupil	Year	Reg. group
Greenholm Primary	TEST2 TEST2	TEST	TEST

Add to my account
Cancel

After you confirm the add, these pupils will be transferred to the account you are logged into and the old account will be disabled.

Click **add to my account**, and you will be returned to home screen. You should now be able to see the other account, as a new tab, on the home screen.

The screenshot shows the ParentPay interface. At the top, there are logos for ParentPay and Greenholm Primary School, and a user greeting: "Hello, Stephen Barrett (s.ba...)" with links for "View / edit your profile" and "Log out". A basket icon shows "Basket £0.00 (0 items)".

The navigation bar includes: Home, Pay for items, Make bookings, Transaction history, Menus & choices, Communications.

The sidebar "I want to..." contains: Go to homepage, Pay for items, Make bookings, View transaction history, View menus & choices, View communications, View / edit profile.

The main content area has tabs for "Overview", "TEST", and "TEST2". The "Overview" tab is active, showing "Items due for payment" and "Dinner money balances -".

Due date	Item description	Name	Amount	
24 Sep 2013	Shugborough Hall - Y5	TEST	£15.00	Add to basket
-	Dinner Money for Greenholm Primary, Bal: £0.00	TEST	-	Add to basket
-	Dinner Money for Greenholm Primary, Bal: £0.00	TEST2	-	Add to basket
31 Jan 2014	Bell Heath - Y4 Residential, To Pay: £95.00	TEST	£95.00	Add to basket
-	SMS Text Alerts, Bal: £0.00	-	-	Add to basket

Buttons at the bottom: "Pay for more items" and "Checkout".

The payments for both children will appear in the *overview* tab.

## How to pay for school dinners

From the home screen, you will be able to see *Dinner money for Greenholm Primary, Bal £0.00*.

The balance for dinner money will always be set at £0.00; this is because we have opted out of the dinner registers option on the website. The money records will still be kept by Mrs McMillan.

Please note: If you have 2 or more children at the school you do not need to make separate payments for each child. You can pay under one child's account, and make a note informing us what the payment is for.

The screenshot shows the ParentPay website interface. At the top, there is a navigation bar with links: Home, Pay for items, Make bookings, Transaction history, Menus & choices, and Communications. Below this is a sidebar with 'I want to...' and several action buttons: Go to homepage, Pay for items, Make bookings, View transaction history, View menus & choices, View communications, and View / edit profile. The main content area displays 'Items due for payment' with a table and a 'Dinner money balances -' section. The table has columns for Due date, Item description, Name, and Amount. The 'Add to basket' button for the £0.00 entry is highlighted with a red box.

Due date	Item description	Name	Amount	
24 Sep 2013	Shugborough Hall - Y5	TEST	£15.00	
-	Dinner Money for Greenholm Primary, Bal: £0.00	TEST	-	
-	Dinner Money for Greenholm Primary, Bal: £0.00	TEST2	-	
31 Jan 2014	Bell Heath - Y4 Residential, To Pay: £95.00	TEST	£95.00	
-	SMS Text Alerts, Bal: £0.00	-	-	

Click **add to basket**.

The screenshot shows a modal form for adding an item to the basket. The form is titled 'Dinner Money for Greenholm Primary - TEST' and includes fields for 'Edit amount' (set to 20.00), 'Add notes' (with a note: 'Pays for child A and child B for week ending 27/9/13'), and buttons for 'Add to basket' and 'Cancel'.

In the box that pops up, enter the relevant information. Entering a note is optional, but we recommend that you use this facility.

Click **add to basket**. A small window will open confirming that the item has been added to your basket. You can add more items if you wish.

The screenshot shows the ParentPay website interface. At the top left is the ParentPay logo. To its right is the Greenholm Primary School logo. Further right, the user is logged in as 'Hello, Stephen Barrett (s.ba...)' with links for 'View / edit your profile' and 'Log out'. A notification at the top right indicates 'Basket £20.00 (1 item)'. Below the navigation bar, there are tabs for 'Overview', 'TEST', and 'TEST2'. A table titled 'Items due for payment' lists several transactions:

Due date	Item description	Name	Amount	
24 Sep 2013	Shugborough Hall - Y5	TEST	£15.00	Add to basket
-	Dinner Money for Greenholm Primary, Bal: £0.00	TEST2	-	Add to basket
31 Jan 2014	Bell Heath - Y4 Residential, To Pay: £95.00	TEST	£95.00	Add to basket
-	SMS Text Alerts, Bal: £0.00	-	-	Add to basket

Buttons for 'Pay for more items' and 'Checkout' are visible at the bottom of the table. A sidebar on the left contains navigation options like 'Go to homepage', 'Pay for items', 'Make bookings', etc.

Once you have added all the items you wish to add, click either **basket** or **checkout**.

The screenshot shows the 'Your basket' page. It states 'Your basket contains 1 item and comes to a total of £20.00.' A table lists the item:

Item description	Name	Amount	
Dinner Money for Greenholm Primary - Dinner Money Service	TEST	£20.00	Remove Edit

Additional information includes 'Minimum top up £10.00', 'Provided by: Greenholm Primary', 'Account balance: £0.00', and a note: 'Note: Pays for child A and child B for week ending 27/9/13'. A large blue box at the bottom right displays 'Total cost £20.00'. Buttons for 'Pay for more items' and 'Pay securely now' are present.

This screen will display all the items in the basket. You can edit or remove each item.

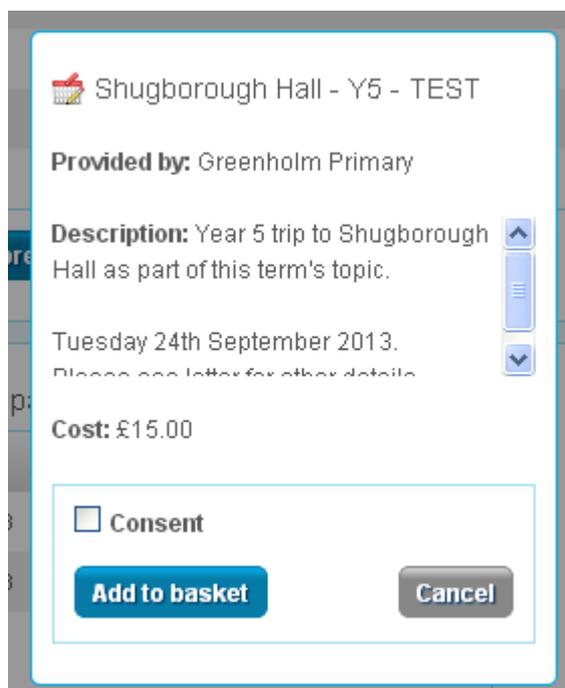
Once you are happy with what you're paying for click **pay securely now**. The next screen will ask for your card details.

Once you have entered your details, simply click **make payment**.

## How to pay for day trips

Paying for day trips works much in the same way as dinners. Once you have identified the trip you wish to pay for click **add to basket**.

Only the appropriate trips will appear on your home screen. Once you have paid, the trip will no longer be visible in the *items due for payment* window.



The screenshot shows a form for a day trip. At the top, there is a small icon of a building and the text "Shugborough Hall - Y5 - TEST". Below this, it says "Provided by: Greenholm Primary". The "Description" section includes "Year 5 trip to Shugborough Hall as part of this term's topic." and "Tuesday 24th September 2013. Please see letter for other details." To the right of the description is a vertical menu with an upward arrow, a list icon, and a downward arrow. The "Cost" is listed as "£15.00". At the bottom, there is a checkbox labeled "Consent" which is currently unchecked. Below the checkbox are two buttons: "Add to basket" in blue and "Cancel" in grey.

On the box that opens, you will be able to see a brief description of the trip.

For school day trips, you will only be able to pay the fixed full amount.

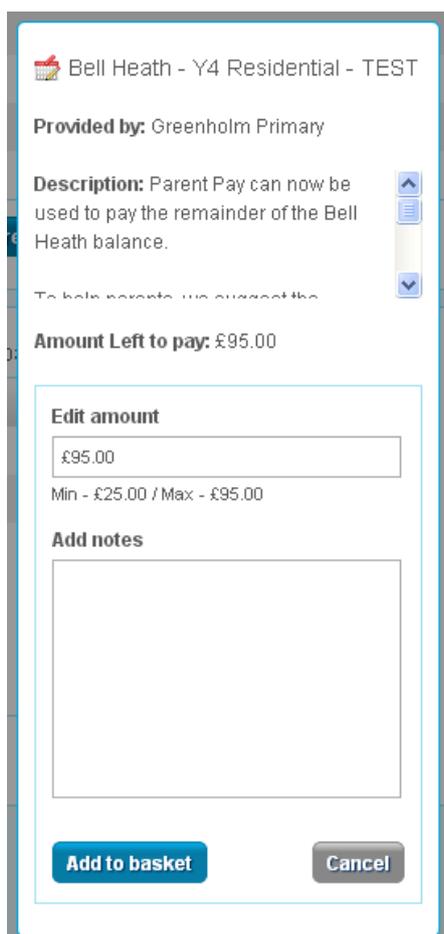
When paying for day trips you will have to tick for consent. **If you are paying online, you have to give consent, meaning you don't need to return the paper slip attached to the letter.**

Once you have added the trip, go to the checkout to complete payment (details on page 11)

## How to pay for residential trips

Paying for residential trips works in much the same way as dinners. However, only the remaining balance, after the deposit, will be available to pay online.

Only once you have paid the deposit, and after the deposit deadline, will you be able to see the residential trip in the *items due for payment* window. Only once you have paid the trip in full will the item disappear.



The screenshot shows a payment interface for a residential trip. At the top, it says "Bell Heath - Y4 Residential - TEST". Below that, it states "Provided by: Greenholm Primary". The description reads: "Parent Pay can now be used to pay the remainder of the Bell Heath balance." There is a vertical scrollbar on the right side of the description. Below the description, it says "To help parents, we suggest the" followed by "Amount Left to pay: £95.00". There is a section titled "Edit amount" with a text input field containing "£95.00" and a range "Min - £25.00 / Max - £95.00". Below that is a section titled "Add notes" with a large empty text area. At the bottom, there are two buttons: "Add to basket" and "Cancel".

In the description you will find details of the payment plan we suggest to parents.

Amount left to pay will show the total remaining outstanding balance. This figure will reflect Parent Pay and cash payments.

When entering the amount you wish to pay, please note that the default amount will be the full cost of the trip.

Once you have entered all the relevant information, click **add to basket** and continue onto the checkout to pay. (Details on page 11).

## How to pay for music lessons

Music lessons will be charged much in the same way as day trips. At the start of each half term you will be able to view music lessons in the *items due for payment* window.

The music lessons will not be broken down into violin or guitar, for example.

When you click **add to basket**, in the description box, it will breakdown the payments for each music lesson type. Enter the appropriate amount and click **add to basket**. Continue onto the checkout to pay. (Details on page 11).

(Please note: We have no images for this process as at the time of this document being written, we did not offer Parent Pay option for music lessons.)

## How to pay for Before and After School Club (BASC)

BASC payments will work exactly the same as dinner money payments. From the home screen, you will be able to see *BASC*.

Only those children who are on the BASC register will be able to pay via Parent Pay. Any children doing AD HOC or one off sessions will still have to pay in cash.

Click **add to basket** and enter the amount you wish to pay. Please utilise the *add notes* facility to explain what and who the payment is for. As with dinner money you can pay for 2 or more children for BASC just on the one account. No need to make separate payments for each child.

Continue onto the checkout to pay. (Details on page 11).

(Please note: We have no images for this process as at the time of this document being written, we did not offer Parent Pay option for BASC.)