

AUTOPAY OVERVIEW



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AutoPay Overview

AutoPay is a recurring payment that parents can set up and control in My BackPack. Once they enroll, AutoPay automatically transfers funds from their bank account, debit card or credit card according to the schedule they set up. Each payment that is made will be applied to their charges that are due at the time of processing.

Important Notes

Our Autopay functionality is currently only available for Network Merchant customers. However, we anticipate we will have this feature available to Authorize.net customers in the near future.

To use our AutoPay feature you will need to ensure you have your Customer Vault turned on in Network Merchants. If you are a Diamond Mind customer, they can assist you with this.

Getting Started

The AutoPay Setup will display for any Administration that has security permissions to Merchant Account Setup in My BackPack .

After making sure your Network Merchant Customer Vault is turned on, log into My BackPack and click on **AutoPay Setup** under the Administration heading.

Administration

Merchant Accounts AutoPay Setup Reload System Settings Sign In As Another User About My BackPack

Turn On AutoPay

Selecting the **On** option under **Select AutoPay Mode** will turn this feature ON (you may work on the setup before turning this feature on). Selecting **Off** will turn the AutoPay feature off but regular one-time My BackPack Online Payments will still be available.



AutoPay Setup

Options	Overview Description	Schedule Description	Schedule Transactions
ransaction Run Tim mount: Field Total Due Tuition Due Custom Custom Tuition Due	E: 10:00 C Label Total Due Tuition Due Incidental Due Custom Tuition Due	Email Summary of AutoPay Adminis I authorize the is non-refund Trace AutoPa off by default but if	of AutoPay Jobs to: tration Fee Disclaimer: § 5.00 admin fee per transaction for these automatic payments that I am submitting. I understand that this fe ble. y Process:This is a log file that will be created to show how Senior Systems arrived at the total amount to charg uid be primarily used in order to trouble-shoot if there was a question about an amount that was charged. This is c an be turned on at any time.
Incidental Due Frequency: Field Semi-Monthly Monthly	Label Weekly Semi-Monthly Monthly		

Options

Transaction Run Time: This is the time of day you would like the merchant account to process your AutoPay transactions.

Amount: Decide which types of charges you would like your parents to be able to pay for - check the box next to the appropriate options, you may change the field label in the text box if desired.

- Total Due: Total amount due for the student at the time of the AutoPay transaction
 - Please note that we do account for deferred, non-deferred and pending payment batches for tuition and incidentals (if applicable) when you select Total Due.
- Tuition Due: The full Tuition amount that is due at the time of the AutoPay transaction
- Incidental Due: The full Incidental amount that is due at the time of the Autopay transaction
- Custom: This allows the parent to enter a Custom amount for Tuition and Incidentals (if applicable). The parent will be charged up to the amount they enter.
 - Example: If a parent enters \$500 in the Custom amount and they owe \$400, they will only be charged the \$400 plus applicable fees.

- Example: If a parent enters \$500 in the Custom amount and they owe \$1000, they will only be charged \$500 plus applicable fees.
- If you are using both Tuition and Incidental, leave these check boxes checked and the parent will have the ability to enter a specific amount for each type of charge.

Frequency: Decide the frequency you would like the parent to have the ability to choose from for processing their AutoPay transactions.

- Weekly: This option allows the parent to make an automatic payment on a specific day each week (Ex. Every Friday)
- Semi-Monthly: This option allows the parent to select 2 specific dates per month to make automatic payments (Ex. The 2nd and 20th of every month)
- Monthly: This option allows the parent to make an automatic payment on a specific date each month (Ex. The 15th of every month)

Email Summary of AutoPay Jobs: Enter one or more email addresses (separated by a comma) for the people who should receive a daily summary email of all AutoPay transactions. Successful and failed transactions will be included.

Note: If no email address is entered, the summary email will be sent to the email address that is specified in Ascendance – System Administration/My BackPack/Preferences:

SU Enter up to 3 email addresses that should receive error reports.

AutoPay Administration Fee Disclaimer: This is the Administration fee that the parent is agreeing to pay for the convenience of using AutoPay. This text is not editable.

Trace AutoPay Process: This is a log file that will be created to show how Senior Systems arrived at the total amount to charge the parent, this would be primarily used in order to trouble-shoot if there was a question about an amount that was charged. This is off by default but it can be turned on at any time.

Once you feel you have everything set up, click **Submit** and you are ready to accept automatic recurring payments using AutoPay!

Overview Description

We have created default text for the AutoPay Overview page, we recommend using this text but there is an HTML editor if you wish to make any changes.

• Submit: This will save your changes and your new default text will appear on the page

- Reset: This will cancel your changes and reset the editor back to the text that was in the editor when you first entered the screen
- Reload Default Description: This will clear out the current text and load the default text from Senior Systems

ACADEMY ACADEMY
AutoPay Schedule Setup
Back to Admin User
Options Overview Description Schedule Description
AutoPay Overview Description
HTTLL Constant Con
AutoPay schedules for your student(s) are listed below. • Click Add Schedule to create a new schedule • Click Update to modify an existing schedule • Click View to see details of an existing schedule set up by someone else • Click Cancel to stop to an existing schedule • Click Re-Enable to reinstate a canceled schedule
Path: div.rich-panel » div.rich-panel-body » p.MsoNormal » span

Schedule Description

We have created default text for the Add Schedule page, we recommend using this text but there is an HTML editor if you wish to make any changes.

- Submit: This will save your changes and your new default text will appear on the page
- Reset: This will cancel your changes and reset the editor back to the text that was in the editor when you first entered the screen
- Reload Default Description: This will clear out the current text and load the default text from Senior Systems

AutoPay Sch	edule Setup			
<u>ck to Admin User</u>				
Options Overvi	w Description Schedule Desc	iption		
utoPay Schedule D	cription			
™ & B <i>X</i> <u>U</u> X	ABC ☰ ☰ ☰ 44 Norm 64 ☆ ⊟ • ⊟ • 詳 詳 ¢ 5 ¹ m m ² ♥ Ⅲ Ⅲ -	i line spa - Paragraph - Taho : • 7 (≈ ∞ 炎 ů 또 - ∠ ×, ײ ☺ ▣	ma • 12pt • <u>A</u> •ª Ω ፼ ⊙ ⊨ ¶ * • •	-
AutoPay is a qu funds from you Follow these sin	ck and easy way to make n bank account, debit card, uple steps:	ecurring payments. Onc or credit card based on t	e set up, AutoPay automat he payment frequency you	ically transfers ı select.
 Select the Ar Select the Fr Enter Payme Save. 	ount. quency of Payments. It Method.			
Set up addition	I schedules for each stude	ıt.		

Schedule Transactions

The **Schedule Transactions** tab allows you to do quick reporting on AutoPay transactions. You can search by the following citeria:

- Student
- MBP Account
- Payment Method
- Payment Status

• Date the Schedule was created

Using the Sort box to the right of the filters you can choose which column you'd like to sort by as well as the direction.

Filter				Sort				
Student Last Name: Student First Name: MBP Account: Select status include Scheduled @ Processed Schedule is created From Schedule is created From	Peyment Hethod: School: A Display: 2 Processed - no charge Fror	Cancel	•	Sort Column: Student N. MBP Accos Payment P Schedule 1 Payment P	Sor ime O int O tatus bate lethod	t Direction: Ascend Descend	Tota	Transactions: 6
Student Name	MBP Account	Status	Creation Date	Towards	Amount	Schedule Date	Payment Method	View
		Processed	3/3/2017	Incidental	\$87.00	3/10/2017	Credit:Visa ending 1111	9
		Processed	3/2/2017	Tuition/Incidental	\$87.00	3/9/2017	eCheck:Saving ending 2222	0
						and a stand of the		25
		Processed	3/2/2017	Tuition	\$675.00	3/9/2017	Debit:American Express ending 8431	8
Garrett James Alexander	AUTOPAYTESTADMIN	Processed Processed	3/2/2017 3/2/2017	Tuition Incidental	\$675.00 \$87.00	3/9/2017 3/8/2017	Debit:American Express ending 8431 Credit:MasterCard ending 4444	9
Garrett James Alexander	AUTOPAYTESTADMIN	Processed Processed Processed	3/2/2017 3/2/2017 3/3/2017	Tuition Incidental Incidental	\$675.00 \$87.00 \$5.00	3/9/2017 3/8/2017 3/3/2017	Debit:American Express ending 8431 Credit:MasterCard ending 4444	4 4

Default Email Templates

We have set up default email templates that will be sent to the parent during the AutoPay process. To edit the text in these emails, click on **Broadcast Email Templates** under the Broadcast Messages heading:



Click on the **Confirmation** tab to see the list of email templates that are available for editing. There are 3 templates that are used in AutoPay.

- AutoPay Payment Confirmation
- AutoPay Payment Failure Notification
- AutoPay Setup Confirmation

Broad	lcast Email Te	emplates					_
General	Student/Parent	Online Billing	Constitue	nt A	dmissions	Gift/Pledge Acknowledgement	Confirma
Jse this page	e to edit text of con	firmation emails a	and to create	, edit or	delete scho	ool/division specific email template	s.
	Defa	ult Templates			_		
			Active	e Action	1		
Online Inqu	iry Confirmation			<i>ø</i>			
Online Inqu	iry Confirmation(St	udent)		ø			
Online Admi	issions Account Cre	ation Confirmatio	n 🔽	ø			
Online Admi	issions Application	Confirmation		<i>ø</i>			
Online Admi	issions Application	Confirmation(Stud	dent)	ø			
Online Enro	llment Contract Sul	bmission Confirma	ation 🔽	ø			
Online Enro	llment Payment Co	nfirmation		ø			
Online Sum	mer School Account	t Creation Confirm	nation 🔍	ø			
Online Sum	mer School Registra	ation Confirmatior	า 🔍	ø			
Form Builde	r Payment Confirm	ation		ø			
AutoPay Pa	yment Confirmatior	า		6			
AutoPay Pa	yment Failure Notif	ication		ø			
AutoPay Se	tup Confirmation			1			

Click the pencil icon next to the email template you wish to edit, make the changes you need and click **Save Template**.

Note: We don't recommend changing the merge fields that we have entered, the emails will pull the actual data that is being used in the transaction so this email will be the parent's receipt. Please be sure you really want to remove those fields before doing so.

Parent Overview

If AutoPay is turned on and the parent has access to Pay Online they will see a link on their home page for AutoPay under My Accounts.

My Accounts

Account Summary Account Details Statements Next Year Statements AutoPay Pay Online

Add New Schedule

The first time a parent clicks on AutoPay they will be brought to the Add Schedule screen.

Parents will see the student(s) name they have billing access for (same as Pay Online) and their current balance if they are eligible for Autopay set up. If there is more than one Student, a dropdown will be available for them to select the Student they wish to set up an Autopay Schedule for.

Amount: This is where the parent will specify the amount they would like to pay each time their recurring payment is made.

- Total Due: Total amount due for the student at the time of the AutoPay transaction, including tuition and incidentals (if applicable)
 - Please note that we do account for deferred, non-deferred and pending payment batches for tuition and incidentals (if applicable) when they select Total Due.
- Tuition Due: The full Tuition amount that is due at the time of the AutoPay transaction
- Incidental Due: The full Incidental amount that is due at the time of the Autopay transaction
- Custom: This allows the parent to enter a Custom amount for Tuition and Incidentals (if applicable). The parent will be charged up to the amount they enter.
 - Example: Parent enters \$500 in the Custom amount and they owe \$400, they will only be charged the \$400 plus applicable fees.
 - Example: Parent enters \$500 in the Custom amount and they owe \$1000, they will only be charged \$500 plus applicable fees.

Frequency: This is the timing the parent would like their recurring payments to occur.

- Weekly: This option allows the parent to make an automatic payment on a specific day each week
 - o Example: Every Friday
- Semi-Monthly: This option allows the parent to select 2 specific dates per month to make automatic payments
 - Example: The 2nd and 20th of every month
- Monthly: This option allows the parent to make an automatic payment on a specific date each month
 - Example The 15th of every month

Begin On: This is the date that the parent would like their recurring payment to begin.

After choosing an amount, frequency and start date the parent will see when their payment will be processed and the email address the confirmation email will go to.

Example: Your next payment will be on May 15, 2017 in the amount up to \$1200.00

	Student Account	Tot	al Due		
enjamin Carl Ad	lams - Upper School - Graduate	\$0.00			
abriel Joseph /	dams - Lower School - Student	\$22,065	40		
eather Danielle	Adams - Middle School - Student	\$28,028	46		
yla Andrea Ad	ams - Upper School - Student	\$17,311.	49		
isan Shirley Ad	ams - Upper School - Withdrawn	\$0.00			
Student: Amount:	Gabriel Joseph Adams - Lower School - Custom	Student • Tuition Due	1000.00	Incidental Due	200.00
	If entering a custom amount, you will indicate above.	be charged the amount due a	t the time of processir	g up to the amount you	
Frequency:	If entering a custom amount, you will indicate above. Monthly	on 15th -	t the time of processir	g up to the amount you	
Frequency: Begin on:	If entering a custom amount, you will indicate above. Monthly • 05-01-2017 •	on 15th -	t the time of processir	g up to the amount you	

Payment Information

Paying By: The parent will select the method of payment they would like to use (Credit Card or eCheck) and enter the appropriate information (this works the same as Online Payments).

Convenience Fee Agreement: This is in your My BackPack setup and will be the same that is used currently for Online Payments.

	Only MasterCard and Visa are accepted.
* Payment Card Number:	
* Expiration Date:	/ Security Code: 1
Cardholder's First Name:	
Cardholder's Last Name:	
	Use Contact Information Already Given
Billing Address:	
Billing Address 2:	
* City:	
State:	▪ Zip:
Country	 (for non-U.S. addresses)
Convenience Fee Agreemen four school charges a conve ayment 'obligation you are check the 'I agree' checkbox, Total Amount Charged' amou card. THERE IS NO CONVENIE I have read and agree.	at nience fee for all online tuition/incidental payments. This fee is separate from the 'Total paying. The convenience fee is included in the 'Total Amount Charged' line, above. Please below, to confirm your acceptance of the convenience fee and agreement to pay the unt indicated, subject to and in accordance with the agreement governing the use of your INCE FEE APPLIED TO YOUR DEPOSIT.
Convenience Fee Agreemer Your school charges a conve Jayment' obligation you are heck the 1 agree' checkbox, Total Amount Charged' amou ard. THERE IS NO CONVENTIE 1 have read and agree. Administration Fee Agreem authorize the \$5,00 admin his fee is non-refundable.	It nience fee for all online tuition/incidental payments. This fee is separate from the 'Total paying. The convenience fee is included in the 'Total Amount Charged' line, above. Please below, to confirm your acceptance of the convenience fee and agreement to pay the unit indicated, subject to and in accordance with the agreement governing the use of your ENCE FEE APPLIED TO YOUR DEPOSIT.

Administration Fee Agreement: This is the admin fee that is billed to the parent each time a recurring payment is processed.

The parent can Save or Cancel their AutoPay schedule.

Existing AutoPay Schedules

ASCENDAN ACADEM	NCE VIEW CONTRACTOR					
AutoPay						
Bock to Admin User						
AutoPay schedules for your student(s) an Cick Add Schedule to create a new Cick Update to modify an existing s Cick View to see details of an exist Cick Cancel to stop to an existing s Cick Cancel to stop to an existi	re Isted below. schedule ichedule ng schedule set up by someone else chedule ield schedule					
	Student Account •	Payment Method +	Frequency +	Amount +	Next Payment •	Creator +
Cancel Update	Heather Danielle Adams - Student	eCheck: Checking 6789	Monthly	Total Due	3/25/2018	PARENT
Cancel Update	Gabriel Joseph Adams - Student	Credit: Visa 1111	Monthly	Total Due	3/15/2018	PARENT
Cancel Re-Enable	Benjamin Carl Adams - Graduate	Credit: Visa 1111	Monthly	Tuition Due		PARENT

After the parent has set up an AutoPay schedule, the next time they click on AutoPay from the home page they will be brought to the AutoPay schedule screen.

On this screen the parent will have the ability to:

- Add a Schedule
- Update a Schedule
- View a Schedule
- Cancel a Schedule
- Re-Enable a Schedule

Add Schedule: This allows the parent to Add a new schedule for a different Student.

Update: This allows the parent to review and update their recurring payment information. They can also see the past and upcoming transactions. Clicking the magnifying glass on a specific row will show you the details for that transaction or scheduled transaction.

Student Account	Total Due		Date	Amount	Towards	Status	Iransaction #	Payment Method	V8
rather Danielle Adams - Student	528,028.46		3/25/2018	Total Due	Tuition/Incidental	Scheduled		eCheck:Checking ending 6789	9
Amount: Total Due •									
Frequency: Monthly • on 25th •									
Begin on: 03-25-2018									
The confirmation email is sent to pamela.nelsone@	and the payment is m	nade.							
Paying By:									
eCheck:Checking ending 6789									
Use new payment method:									
Credit Card eCheck									
Administration Fee Agreement									
I authorize the \$5.00 admin fee per transaction for the understand that this fee is non-refundable.	ese automatic payments that I am subr	mitting. I							
I have read and agree.									

View: This allows the parent to view a recurring payment schedule that was set up by someone else, for the student they also have billing access for. This schedule cannot be changed by anyone other than the parent who set it up initially.

Cancel: This allows the parent to stop their recurring payment schedule. The schedule will remain in the system for future use if desired.

Re-Enable: This allows the parent to start a recurring payment schedule they had previously stopped.

AutoPay Transactions in Ascendance

To view Students AutoPay transactions in Ascendance, open the **AR** module and go to **Student Maintenance.** On the Account tab you will see an AutoPay button inside the Balances section of the screen. Clicking on this button will open a window to show you all the details for student you are currently viewing.

		Financia	al Aid			
Acct. Type	CACTIVE	•	Туре	Amount		
Tuition Plan		▼ Loan		0.00		
Service Plan	•	Fin. Aid	ł	▼ 0.00		
Service Plan I.D.		Fin. Aid	1 Pct 0.00			
Tuition Late Charges	Accident Ins.					
✓ Tuition Late Charges Balances Current	Cver 30	Over 60	Over 90	Over 120	Fotal Due	
✓ Tuition Late Charges Balances Current 92,00	Over 30	Over 60 0.00	Over 90 0.00	Over 120 7	Total Due 767.00	Autopay
✓ Tuition Late Charges Balances Current 92:00 Beginning Balance	0 ver 30 0.00 675.00	Over 60 0.00 Prepaid Balance	Over 90 0.00 0.00	Over 120 675.00	Total Due 767.00 0.00	Autopay
✓ I ruition Late Charges Balances Current 92.00 Beginning Balance Payments Received	0 ver 30 0.00 675.00 0.00	Over 60 0.00 Prepaid Balance Enroll. Dep. Bal.	Over 90 0.00 0.00 675.00	Over 120 675.00 Current Tuition Bal.	Total Due 767.00 0.00 . 675.00	Autopay
Tuition Late Charges Balances Current	0 ver 30 0.00 675.00 0.00	Over 60 0.00 Prepaid Balance Enroll. Dep. Bal. Enroll. Other Dep. Bal	0ver 90 0.00 0.00 675.00 0.00	Over 120 675.00 Current Tuition Bal. Overdue Tuition Bal Prev. Year Tuition B	Total Due 767.00 0.00 675.00 al. 0.00	Autopay