SIMS

SIMS Pay for Customers

Handbook

Revision History

Version	Change Description	Date
2.0	Rebranded as SIMS Pay. Rebranding changes (including updates to graphics) made throughout. Handbook title changed to *SIMS Pay for Customers*. Capita Doc Ref had to MGPayCustomer. Updated the *Registering your Account* and *Signing In* topics for new SIMS ID screens.	04/02/2019
2.1	New SIMS Pay home page graphic.	18/02/2019
2.2	*Paying Fees* topic added for schools using SIMS Fees Billing.	10/07/2019
2.3	Added the *Managing your Cards*, *Deleting a Saved Card*, *Re-ordering the List of Cards*, *Selecting the Payment Method*, *Using a Saved Card*, *Using a New Card* and *Payment Card Statement* topics to the *Using SIMS Pay* chapter. Updated the *Welcome to SIMS Pay*, *Viewing My Payments*, *My Basket* and *Checking Out* topics.	28/01/2020

Capita Doc Ref: MGPayCustomer/HBK/280120/CE

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

publications@capita.co.uk

Please ensure that you include the module name, version and aspect of documentation on which you are commenting.

C | Contents

01 | **Getting Started with SIMS Pay**

Welcome to SIMS Pay

SIMS Pay is an online marketplace, which enables schools to sell and collect payment for items such as school uniform, school meals, trips, events, clubs and other school activities, in a safe and secure way.

The benefits of using SIMS Pay include:

- the ability to make safe and secure online payments at any time of the day.
- the ability to make payments via debit or credit card.
- the ability to make payments in person via PayPoint and Post Office counters.
- the ability to pre-pay for school meals.
- the ability to identify when payments are due and whether sufficient funds are available.
- the ability to receive email notifications when a balance falls below a set amount.
- the ability to view current balances and a payment history.

Parent/guardians have these additional benefits:

- the ability to pay for expensive items (e.g. school trips) in instalments, at the discretion of the school.
- the ability to maintain a single SIMS Pay account that serves all of their children, even if they attend different schools (this is available only if all the schools use SIMS Pay).
- the ability to select school meals and review previous meal purchases.
- the ability to pay for school fees, if the school uses SIMS Fees.
- the ability to save card details to speed up the checkout process.

NOTE: The contents of the graphics (dates, names, panel numbers, etc.) are examples only of what you might expect to see when using SIMS Pay.

NOTE: Local currency replaces pounds sterling where appropriate.

Your Invitation to Register Your SIMS Pay Account

Your school will send you an invitation to create a SIMS Pay account for yourself. The invitation can take the form of an email or a letter.

You will need an account with one of our supported identity providers: SIMS ID, Microsoft, Office 365, Google, Facebook or Twitter. It is possible to use an existing account to register, or you can create a new one.

Parent or Guardian

The invitation from your child(ren)'s school contains:

- a unique invitation code required for registering your SIMS Pay account.
- the name of your child(ren) currently at the school for whom you can make payments once registered.
- the additional information you will need to provide when registering, i.e. your child, or one of your children's, date of birth.
- what you can do with your account, i.e. make payments for your child(ren) at the school using SIMS Pay.
- a link to the registration page (if you received an email) or a URL to enter in a browser window (if you received a letter).
- the date by which you must register your account. If you do not register by this date, a new invitation will be required.

> *WARNING: If another parent/guardian of the child(ren) wishes to register an account, either instead of, or as well as the person to whom the invitation was addressed, please contact the school to request a separate invitation. You should not attempt to use an invitation code intended for another person.*

> *IMPORTANT NOTE: If you already have a SIMS Pay account for a child, new children will be added to this account as they enter the school.*

School Employee

The invitation from your school contains:

- a unique invitation code required for registering your SIMS Pay account.
- the additional information you will need to provide when registering, i.e. your date of birth.
- what you can to do with your account, i.e. make payments for yourself at the school using SIMS Pay.
- a link to the registration page (if you received an email) or a URL to enter in a browser window (if you received a letter).
- the date by which you must register your account. If you do not register by this date, a new invitation will be required.

If you are also the parent/guardian of a child(ren) at the school, the invitation lists the child(ren) for whom you will be able to make payments once registered.

The range of payments you can make for your child(ren) is greater than the range of payments you can make on your own behalf (please see *Welcome to SIMS Pay* on page *1*). The single invitation covers all your identities within SIMS Pay, i.e. school employee and parent/guardian.

Administrator

This account can be used to administer the school within SIMS Pay.

If you are an administrator, any other identities you possess within SIMS Pay as either a school employee or a parent/guardian of a child(ren) at the school will be encompassed within the single invitation. This means that:

- as an administrator, you will also be known to SIMS Pay as an employee.

  You can use this account to administer the school and make payments for yourself using SIMS Pay.

- as an administrator who is additionally known within SIMS Pay as the parent/guardian of a child(ren) at the school, you can use this account to administer the school and make payments for your child(ren) at the school using SIMS Pay.

**Additional Resources:**

SIMS Pay for Schools handbook

Registering your Account

The registration process for the following customers is the same:

- the parent/guardian of a child(ren) at the school,
- a school employee who may also be the parent/guardian of a child(ren) at the school,
- an administrator of SIMS Pay who is a school employee and who may also be the parent/guardian of a child(ren) at the school.

1. Navigate to the URL for the SIMS Pay website given in the invitation.
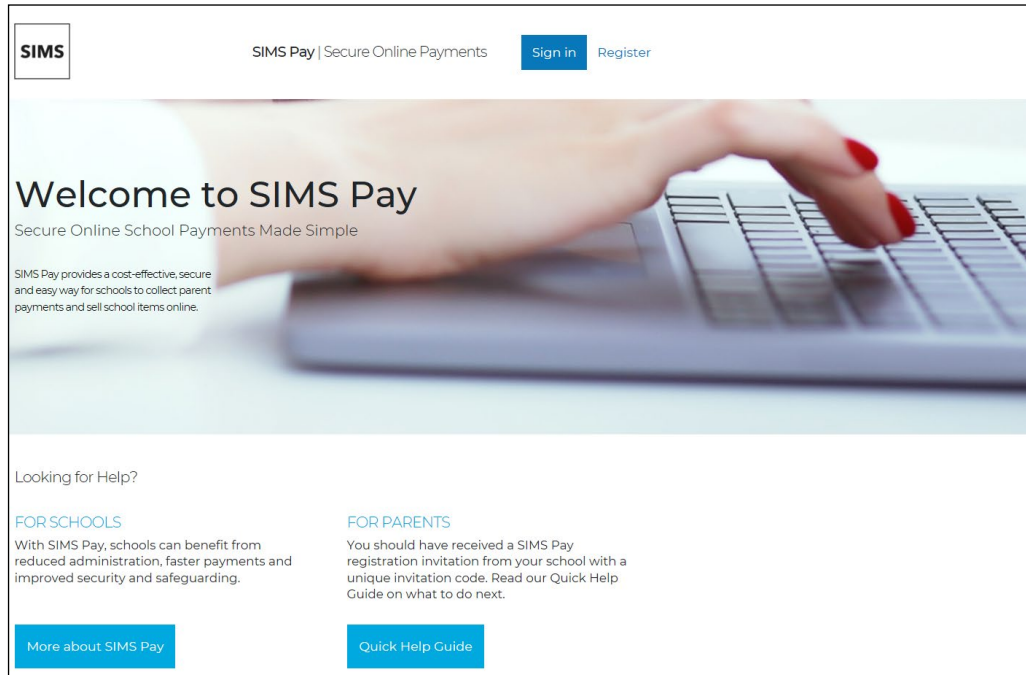
2. Click the **Register** button on the right-hand side of the screen to display the **Sign in to SIMS Pay** page.
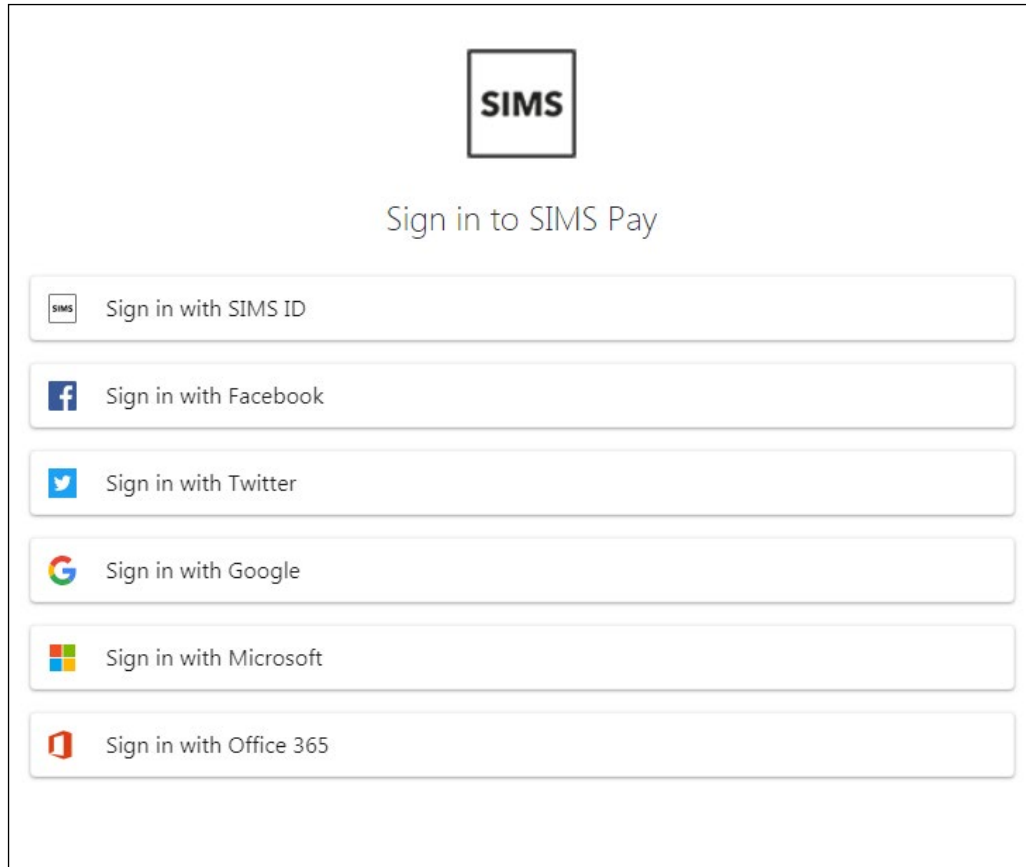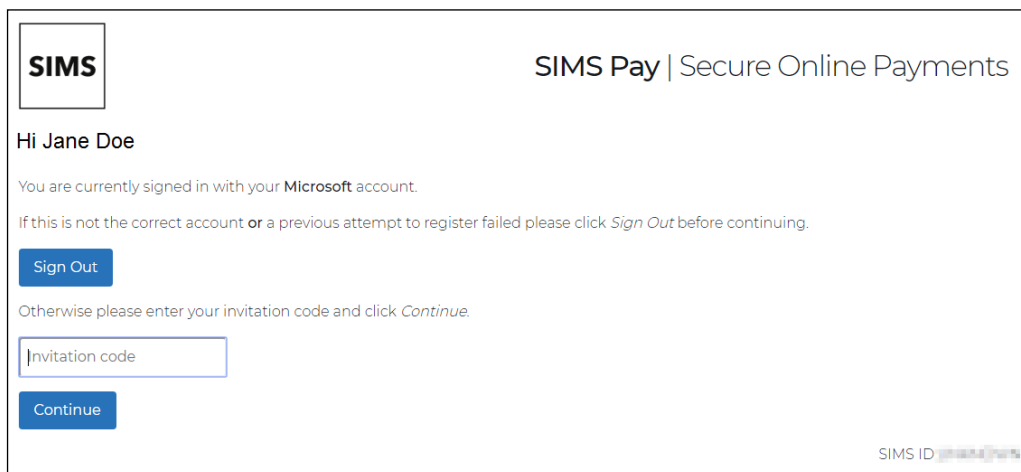
NOTE: If you see the **Account Welcome** page instead of the **Sign in to SIMS Pay** page, review the guidance (please see Account Welcome Page on page 11).

NOTE: To register a SIMS Pay account, you will need an account with one of our supported identity providers: SIMS ID, Microsoft, Office 365, Google, Facebook or Twitter. It is possible to use an existing account to register, or you can create a new one.

3. Click the icon for your preferred account provider to be directed to sign in.

    The precise steps will vary depending on which account provider you select, but typically you will be asked to sign in to your account and satisfy account security. If this is the first time you have registered this account with SIMS Online Services, you will see the **SIMS ID permissions requested** page (please see *SIMS ID Permissions* on page *10*).

    The **Registration - Welcome** page is displayed, showing your name (as recorded by the account) and the identity provider you selected. This is helpful if you share a computer with other users.
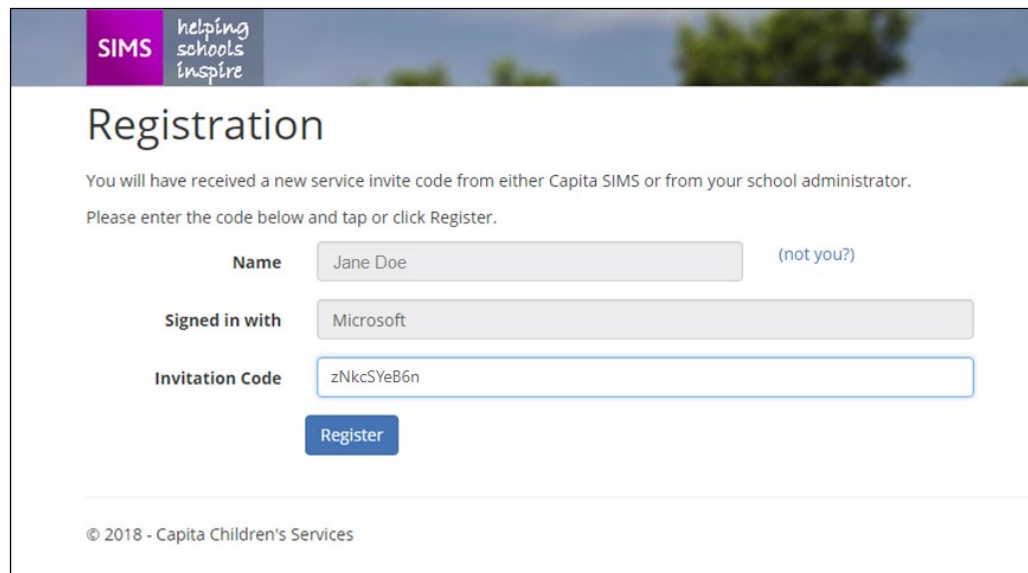

4. Check that the name and account are what you expected to see.
    -   If the details are correct, enter the **Invitation Code** from your invitation, then click the **Continue** button.
    -   If the account details are incorrect, click the **Sign Out** button, then sign in again with the correct account.
5. One of three pages is displayed:
    -   The SIMS ID **Registration** page. This is the standard registration sequence for new users of SIMS ID (please see *Registration* on page *6*).
    -   The **Confirm Details** page. You will see this page if you have previously registered for another SIMS Online Service with these credentials (please see *Confirming Account Details in SIMS Pay* on page *7*).
    -   An error message is displayed at the bottom of the **Registration - Welcome** page (please see *Errors Encountered When Entering the Invitation Code* on page *11*).
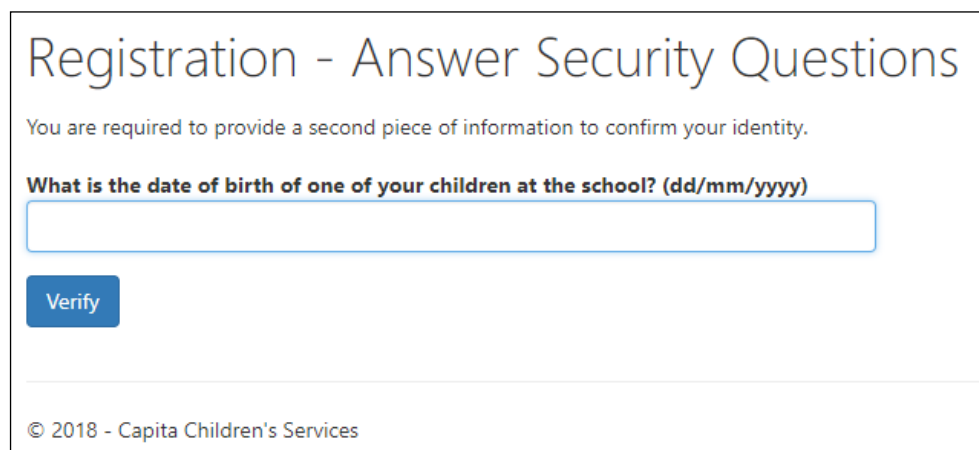
Registration

If this is the first time you have registered this account with SIMS ID, the SIMS ID **Registration** page is displayed.

The **Invitation Code** field is pre-populated with the code you entered on the **Registration - Welcome** page.

1. Click the **Register** button.

NOTE: The security question you are asked depends on whether you are registering as a parent/guardian or as an employee. The invitation from the school identifies the information you need to provide.

2. Enter the information requested on the **Registration - Answer Security Question** page.

This is the same information referred to in the invitation received from the school.

- Parent/guardians enter the date of birth of their child/one of their children at the school.
- School employees enter their own date of birth, even if they are also registering as parent/guardians and/or administrators.

3. Click the **Verify** button to create your account.
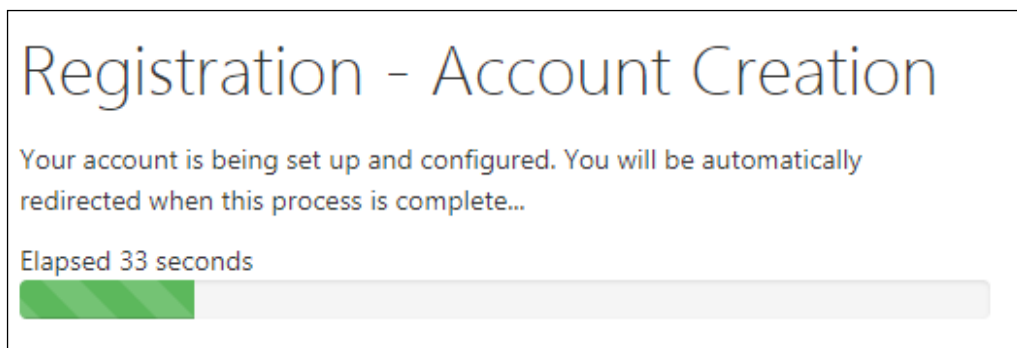
Once the account is set up, you are redirected to SIMS Pay to complete the account set up (please see *Confirming Account Details in SIMS Pay* on page *7*).
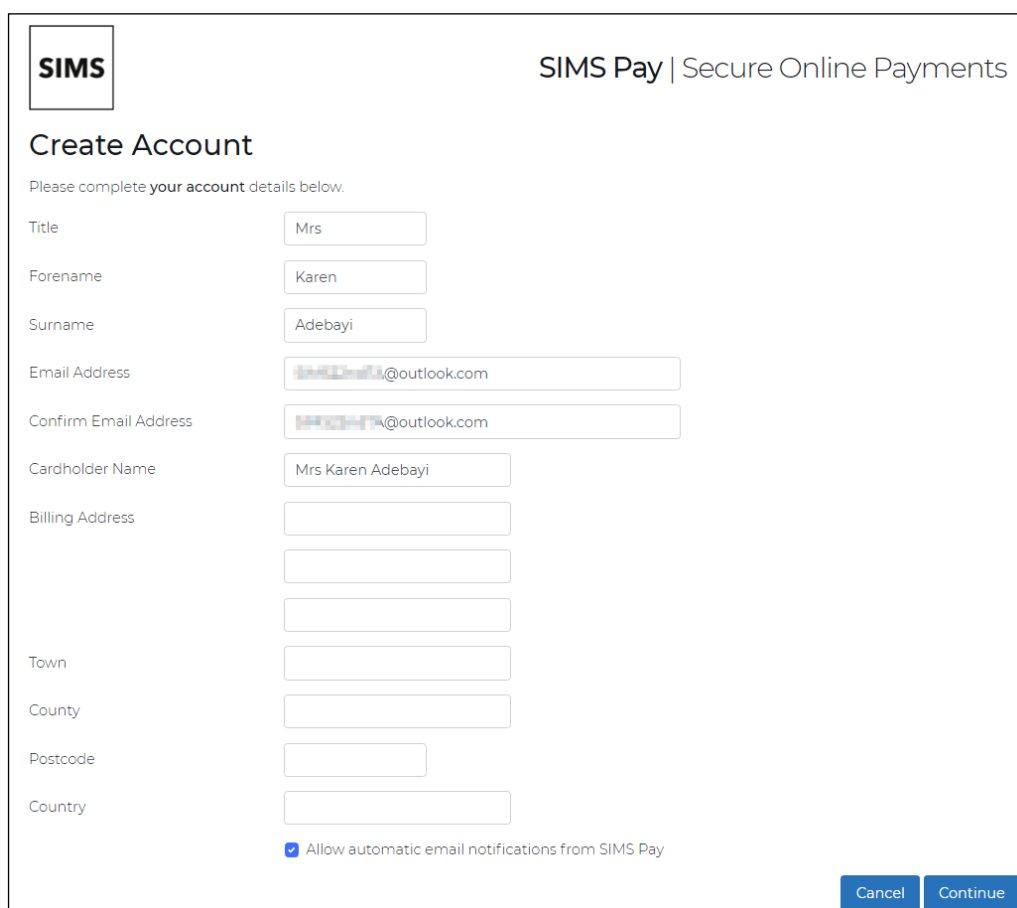
Confirming Account Details in SIMS Pay

Once your account is set up, you are redirected to SIMS Pay.

*NOTE: If you have already registered these credentials with SIMS ID, you will be directed here from the **Registration - Welcome** page.*

1. On the **Confirm Details** page, check that your **Title**, **Forename**, **Surname** and **School** details are correct.
    a. If the read-only information is correct, click the **Continue** button.
    b. If the read-only information is incorrect, click the **Cancel** button.

2. Complete your account details if this is the <u>first</u> time you have registered a SIMS Pay account. If you have previously registered with SIMS Pay (e.g. at another school), you will not see this step.


a. Record an **Email Address** and repeat this in the **Confirm Email Address** field.

b. The **Allow automatic email notifications from SIMS Pay** check box should be selected if you wish to receive email notifications from SIMS Pay. Deselect this check box, if required (please see *Checking My Details* on page *16*).

c. Cardholder information is pre-populated with the details of the primary contact. If these are incorrect, enter the **Cardholder Name** and **Billing Address** (including **Town** and **Postcode**) for the card holder who will be making payments.

> *TIP:* Cardholder details will be used during the checkout process to save time. If you would prefer to enter these details at the checkout each time you pay for an item, these details can be left blank.

d. Click the **Continue** button.
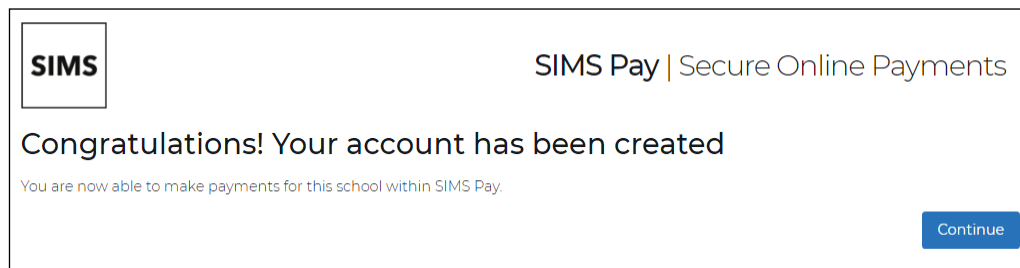
NOTE: If you are also an administrator, this message will read **You are now able to administer this school and make payments for this school within SIMS Pay**.

If you have previously registered with SIMS Pay, you will not see the **Congratulations!** page.

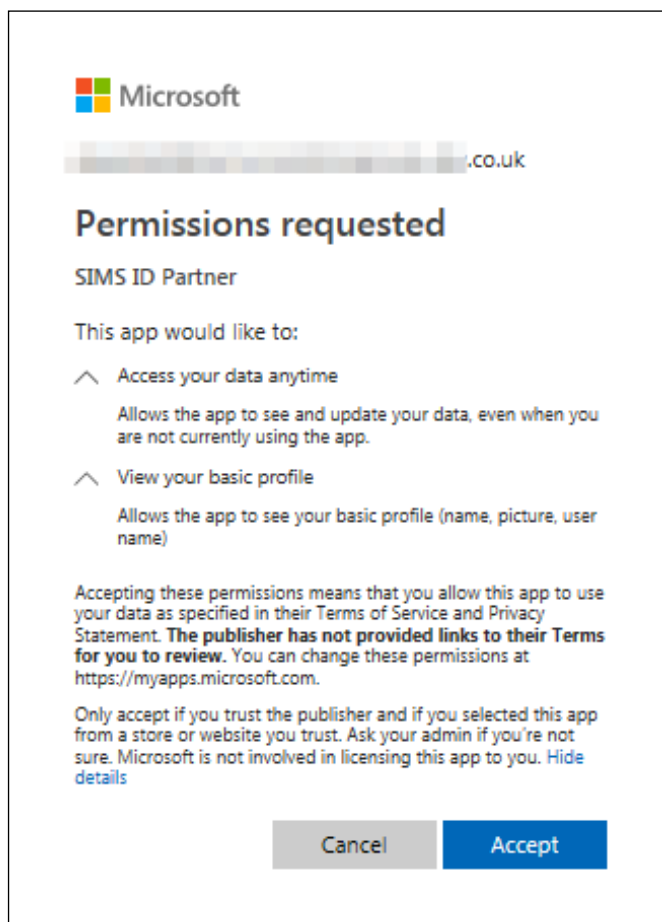3. Click the **Continue** button on the **Congratulations!** page.

If you are an administrator, SIMS Pay opens at the **Dashboard**. For all other users, SIMS Pay opens at **My Homepage**. You can now use SIMS Pay.
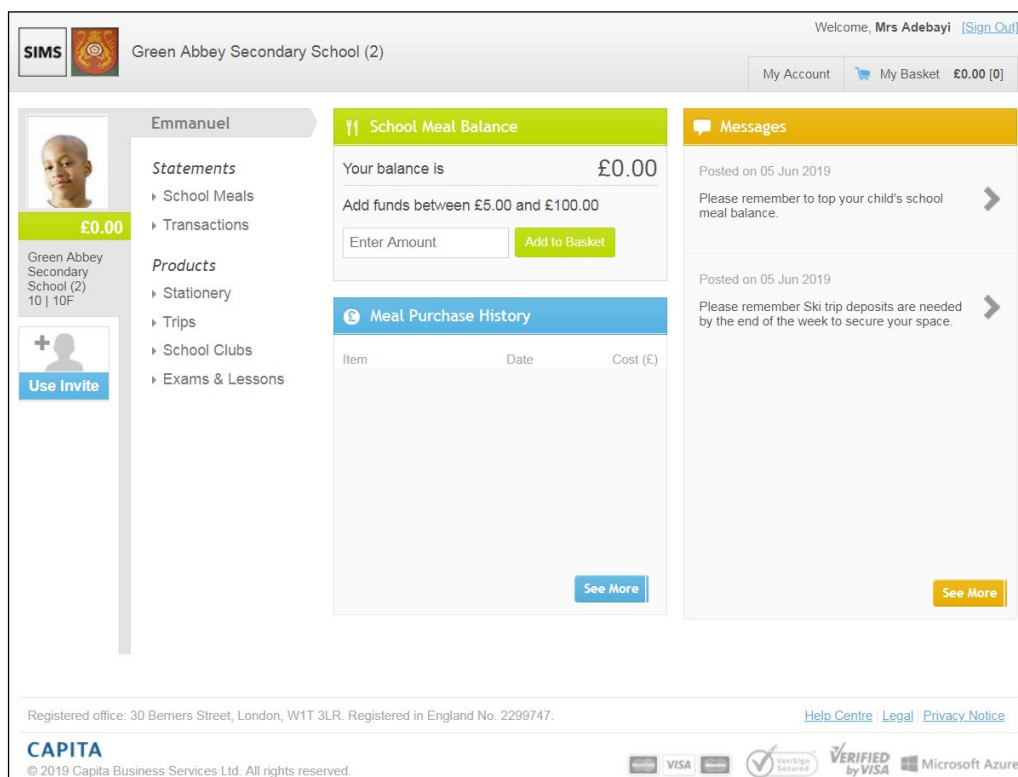
SIMS ID Permissions

If this is the first time you have registered this account with SIMS Online Services, you will see the SIMS ID permission screen.

Click the **Accept** button.

The permissions screen has a link to the SIMS ID Support & User Guide Legal page (https://id.sims.co.uk/support/SiteSettings/Wiki/Index/51?title=Legal). This page provides links to the Legal Statement, SIMS ID Cookie Policy and SIMS ID Privacy Guidance Statement.

Account Welcome Page

If you see the **Account Welcome** page during registration, this means you clicked the **Sign In** button instead of the **Register** button.

Click the yellow **Register Account** button at the bottom of the page to be redirected to the SIMS ID registration sequence (please see *Registering your Account* on page *3*).

You will be redirected to the SIMS ID registration sequence (please see *Registering your Account* on page *3*).

Errors Encountered When Entering the Invitation Code

If, after clicking the **Continue** button on the **Registration - Welcome** page, you do not see either the SIMS ID **Registration** page or the SIMS Pay **Confirm Details** page, check the error message at the bottom of the screen.

If you see **This invitation code is no longer valid**, contact your school. Invitation codes are time-limited and invitation codes entered after the final date on the invitation do not work.

If you see any other error message, follow the on-screen instructions, which may resolve your issue.

If you are still unable to register your account, make a note of the error message and contact your school.

02|**Using SIMS Pay**

Signing In

Sign in to SIMS Pay with the same account (from one of our supported identity providers) that you registered when creating your SIMS Pay account (please see *Registering your Account* on page *3*).

1. In a web browser, navigate to the SIMS Pay website (https://www.sims-pay.co.uk).
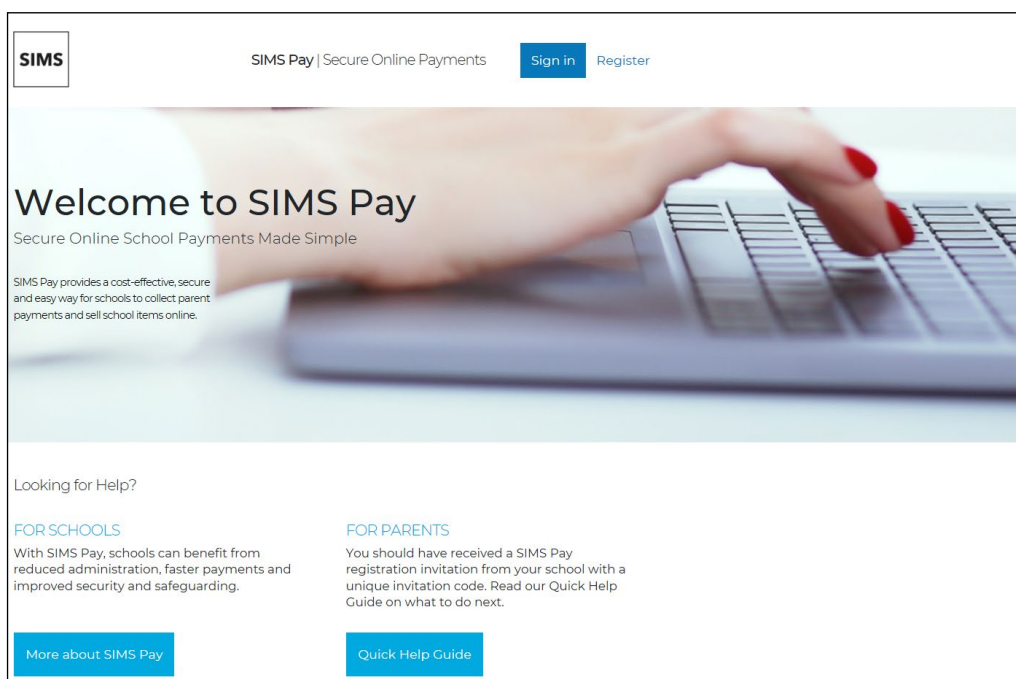
2. Click the **Sign In** button to display the sign in page.

3. Click the icon for your sign in provider and you will be directed to sign in using your existing details.

4. On completion of sign in, the SIMS Pay home page (**My Homepage**) is displayed.

TIP: For problems with signing in, please review the Troubleshooting section of this handbook.

Managing My Account

Once an account has been set up, its details can be managed via the **My Account** page.

My Homepage is displayed when you sign in. It is also available by selecting the **My Homepage** tab on the top right-hand side of the screen (unless you are already on the home page).

The **My Account** page is available from **My Homepage** by selecting the **My Account** tab on the top right-hand of the screen. The widgets you see vary according to the SIMS Pay functionality your school has made available.

NOTE: The contents of the graphics (dates, names, panel numbers, etc.) are examples only of what you might expect to see when using SIMS Pay.

This **My Account** page shows a school that has implemented **School Meals** and **Menus**.

This **My Account** page shows a school that has implemented **School Meals** and **Fees**.

NOTE: Local currency replaces pounds sterling where appropriate.

Checking My Details

> *TIP:* **My Homepage** *is displayed when you sign in. It is also available on the* **My Homepage** *tab on the top right-hand side of the screen (unless you are already on the home page).*

1. From **My Homepage**, select the **My Account** tab on the top right-hand side of the screen to display the **My Details** page.

2. Ensure that these details are correct.

   If any of these details change, update SIMS Pay and contact the School Administrator.

   The **Allow automatic email notifications from SIMS Pay** check box should be selected if you wish to receive email notifications from SIMS Pay. Deselect this check box, if required. By selecting the check box, you are enabling the following notifications:

   - Product notifications
   - School Meal Balance notifications. A message will be sent to you when your balance reaches a pre-determined threshold, to give you a chance to 'top up' before the balance runs out
   - Next instalment due soon notifications (applies to instalment payments only)
   - Overdue instalment notifications (applies to instalment payments only).

> *TIP: Cardholder details recorded here are for the purpose of auto-completing fields during the checkout process. Cardholder details do not have to be recorded in the **My Details** screen but if they are <u>not</u> recorded, they will need to be entered manually during the checkout process for every transaction.*

Managing My Links

> *TIP: **My Homepage** is displayed when you sign in. It is also available on the **My Homepage** tab on the top right-hand side of the screen (unless you are already on the home page).*

1. From **My Homepage**, select **My Account** on the top right-hand side of the screen to display the **My Details** page.

2. Select **My Links** from the menu on the left-hand side of the screen.

> *NOTE: Employees will also see a panel named **Me**, where they can manage their own link.*

Changing the Display Order of Links

The display order of the links can be changed by clicking the **Up** and **Down** arrows in the header of each individual.

Using a Preferred Name

A preferred name can be added to anyone in your account. This may be due to personal preference or for identification purposes, e.g. if there is a duplicate record for a child because the child has moved school (please see *Moving Schools* on page *22*).

1. Click the edit icon in the heading of a child to display the **Manage Link** dialog.

 Edit icon

2.	Enter the **Preferred Name** that you would like to be displayed in SIMS Pay for this individual.

> *TIP: A **Preferred Name** may include other information, e.g. `Charlotte – Bedford School` if, for example, a child has moved school (please see* Moving Schools *on page* 22*). This helps to identify the correct child's account when making payments.*

3.	Click the **Save** button to return to the **My Links** page.

Hiding a Link from the Home Page

You may wish to hide a link from **My Homepage** if, for example, a child has moved schools (please see *Moving Schools* on page *22*). Hiding a link stops all notifications for that individual until the link is re-instated (please see *Re-instating a Previously Hidden Link* on page *18*).

1.	Click the edit icon in the heading of a link to display the **Manage Link** dialog.

 Edit icon

2.	Click the **Hide** button.

Hidden links will still be visible on the **My Links** page but they will be displayed with a grey heading.
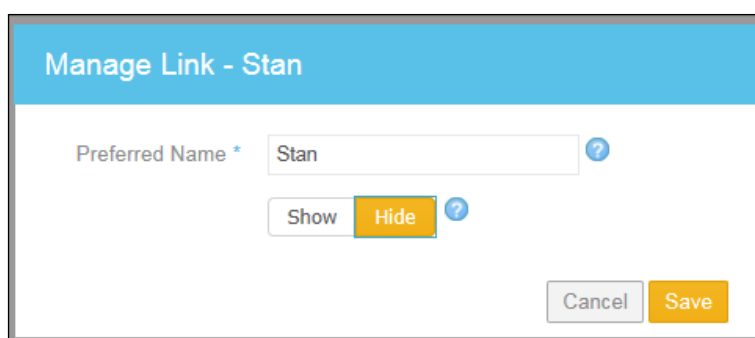
Re-instating a Previously Hidden Link

Re-instating a link to **My Homepage** also restarts notifications for that individual. Email notifications can be enabled or disabled (please see *Checking My Details* on page *16*).

1.	Click the edit icon in the heading of a link to display the **Manage Link** dialog.

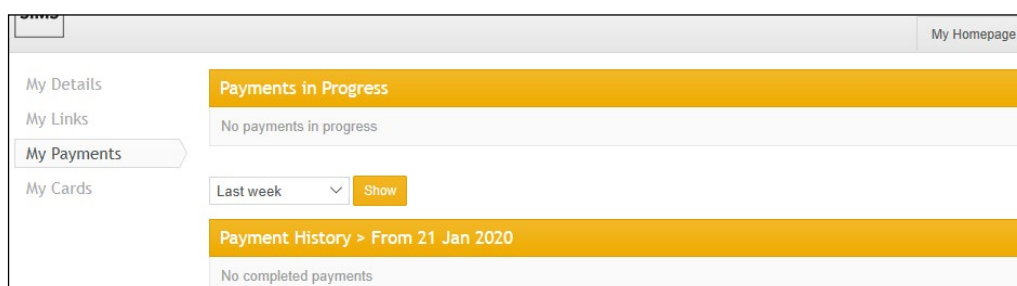 *Edit icon*

2. Click the **Show** button.

    Links that are not hidden are displayed on the **My Links** page with a yellow heading.

Viewing My Payments

Viewing payments from the **My Account** tab will show all payments made via your account. It will <u>not</u> show payments made by other account holders for a child(ren) linked to this account. To view all payments made by all account holders for a linked child(ren), see the School Meal Statements or Transaction Statements area of the home page (please see *Viewing Transaction Statements* on page *42*).

*TIP: **My Homepage** is displayed when you sign in. It is also available on the **My Homepage** tab on the top right-hand side of the screen (unless you are already on the home page).*

1. From **My Homepage**, select **My Account** from the top right-hand side of the screen to display the **My Details** page.

2. Select **My Payments** from the menu on the left-hand side of the screen.

-   **Payments in Progress** are shown at the top of the screen.
-   **Payment History** is shown below for the period being displayed. The default period is **Last week**.

3. To change the period displayed, select a different time period from the drop-down list (e.g. **Last week**, **Last 2 weeks**, etc.) and click the **Show** button.

Payments in Progress			
No payments in progress			

Last year ▼ [Show]

Payment History > From 13 Apr 2017			
Transaction Number	Transaction Date	Payment Reference	Total
255082970	02 Feb 2018	VISA *0437	£35.75
255082969	02 Feb 2018	VISA *0437	£20.00

Each transaction within the selected time period is displayed.

4. Click any **Transaction Number** to view the payment receipt.

[Back]

Payment Details	
Authorisation Code	116775
Transaction Number	255082970
Transaction Date	02 Feb 2018
Payment Reference	VISA *0437

Charlotte Ackton - Waters Edge School (2)			
Product	Quantity	Price	Amount Paid
Chess Club After School (Tuesdays Autumn Term)	4	£5.00	£20.00
Girls jumper (Small)	1	£10.00	£10.00
Pack of 10 personalised (with child's name) laser etched pencils	1	£2.50	£2.50
Pack of 18 gel pens (assorted colours)	1	£3.25	£3.25
	Total Amount Paid for 7 items		£35.75

Payments are processed on behalf of the school through Pay360 by Capita. This will appear as 'SCHOOLPAY-CAPITAL' on your card statement.

Please note your payment card number is not stored by the school or Pay360 by Capita.

Managing your Cards

SIMS Pay allows you to save cards as part of the product checkout process. You can save multiple cards. Standard card types such as VISA® and Mastercard® are supported. The **My Cards** page shows all your saved cards. Use this page to:

- Control the display order of cards during the checkout process by moving cards higher or lower on the display order.
- Delete cards.
- Identify any cards that have expired or are due to expire in the next thirty days.

> *TIP: **My Homepage** is displayed when you sign in. It is also available on the **My Homepage** tab on the top right-hand side of the screen (unless you are already on the home page).*

1. From **My Homepage**, select **My Account** on the top right-hand side of the screen to display the **My Cards** page.
2. Select **My Cards** from the menu on the left-hand side of the screen to display the **Manage your Cards** page.
3. Saved cards are identified by the last four digits of the card.

    By default, cards are displayed in the order they were saved, with the earliest saved card at the top and subsequently saved cards displayed underneath. Cards that have **Expired** are identified, as are cards that will expire in the next 30 days (**Expires soon**). There is no limit to the number of cards that can be saved.
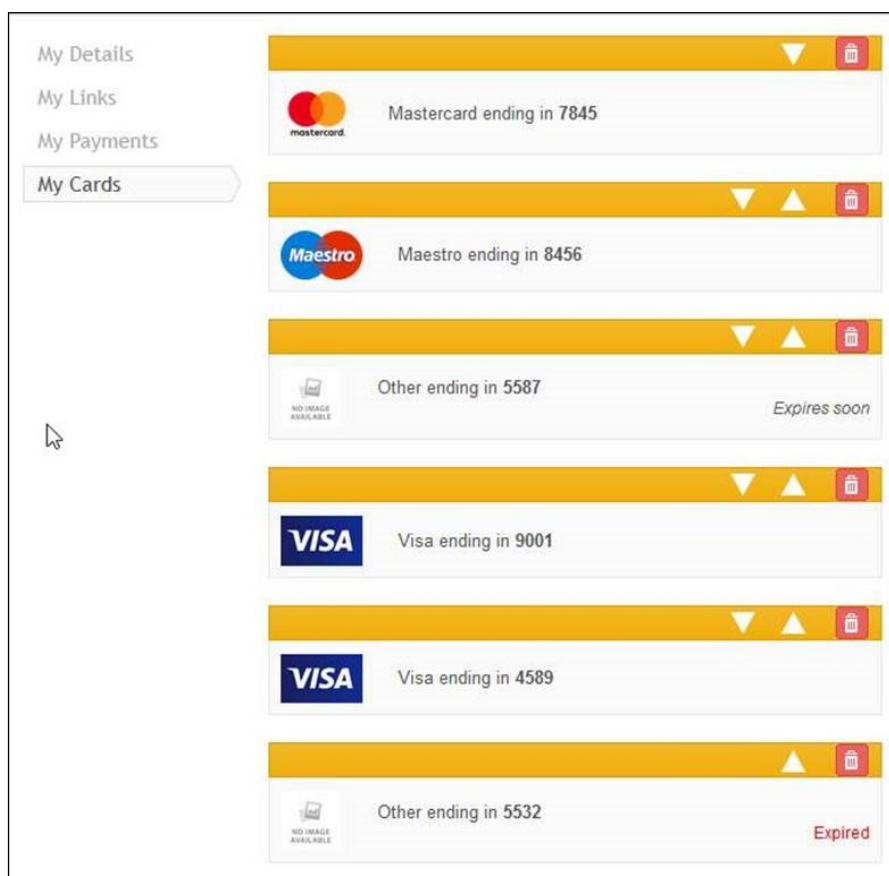
Deleting a Saved Card

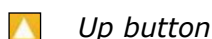To delete a card, click the red **Delete** button adjacent to the card.

Delete button

The card is removed from the list.

Re-ordering the List of Cards

To move a card higher in the display order, click the **Up** button adjacent to the card.

🔼 *Up button*

The card moves one position higher up in the display order with each click of the **Up** button.

To move a card lower in the display order, click the **Down** button adjacent to the card.

🔽 *Down button*

The card moves one position lower down in the display order with each click of the **Down** button.

Moving Schools

When a child moves from one SIMS Pay school to another, any payment history must be kept separate. For this reason, when a child joins a new school, they will be issued with a new invitation code (by the new school) and the parent can add the record to their existing account.

To distinguish between the two records, it is recommended that the preferred name for the child in both records is edited to include the name of the relevant school (please see *Using a Preferred Name* on page *17*). It is also recommended to hide the 'old' record from the home page (please see *Hiding a Link from the Home Page* on page *18*). This will stop any notifications from being issued for that record.

Increasing a School Meal Balance

SIMS Pay enables customers (parent/guardians and employees) to manage payments for School Meals by maintaining a balance in SIMS Pay that the school can use to pay the school meal provider. This gives customers the option to 'top up' their balance less frequently in SIMS Pay than they would be required to pay for school meals directly. Funds can be added for any amount between £5.00 and £100.00. The school will use these funds to pay for School Meals until the balance in SIMS Pay is reduced to £0.00. If you have email notifications enabled, a message will be sent to you when your balance reaches a pre-determined threshold, to give you a chance to 'top up' before the balance runs out. If a payment is made without sufficient funds, the balance will show what is owed.

> *TIP:* **My Homepage** *is displayed when you sign in. It is also available on the* **My Homepage** *tab on the top right-hand side of the screen (unless you are already on the home page).*

1. From **My Homepage**, click a child's name or their picture (if there is one) on the left-hand side of the page to display the selected child at the top of the group.

   To make payments for themselves, an employee should click the **Me** link.

   The **School Meal Balance** for the selected child is displayed in the centre of the screen. It is also displayed under the child's name and (if it is available) picture.

   > *NOTE: If a **School Meal Balance** falls below the threshold set by the school and you have enabled email notifications, you will receive an email notification from the school. The negative **School Meal Balance** in SIMS Pay will be displayed with a red heading until funds are added and the balance becomes positive. Funds can be added at any time.*

2. To **Add funds**, enter the amount you wish to pay in the **Enter Amount** field.

3. Click the **Add to Basket** button to send this item to the **My Basket** page and display this item on the **My Basket** tab.

   An item that costs £10.00 will show on the **My Basket** tab as **£10.00 (1)**. The **(1)** indicates the number of items in the basket.
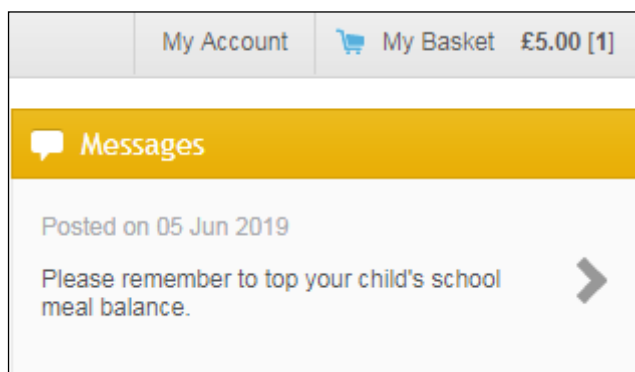

Selecting School Meals

Schools can publish weekly menus through SIMS Pay. This offers advantages to parents who can, using the **Menus** widget, select their child's meals in advance or indicate whether their child will bring a packed lunch or go home for lunch. Parents can also check previous meal selections using the **Meal Purchase History** widget.

A child's dashboard contains useful information about whether menus are available for selection. The **Menus** widget will be highlighted if menu choices are available. Weekly menu selections must be made by a set date, typically the end of the previous week. This date is set by the school. This date is clearly displayed at the top of the menu. Up to this date, selections can be made, amended or deleted as required.

1. From **My Homepage**, click a child's name or their picture (if there is one) on the left-hand side of the page to display the selected child at the top of the group.
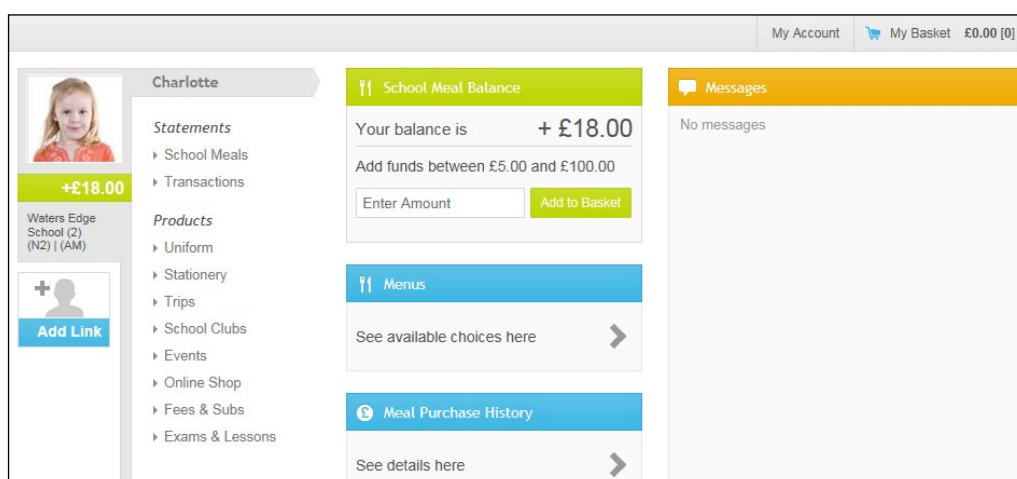
2. Click the **Menus** widget.

   The **Menus** calendar page displays weeks where meal selections can be made.

Each week has five selection fields, one for each day of the week. A tick indicates a meal choice has already been made for the day. A question mark indicates no choice has yet been made for the day.

3. Click anywhere in a week box to enable meal selection and display the menu for the selected week. Scroll down to see all selections.

The **Choices for this menu must be expressed by** date is displayed at the top of the page. This is the date by which you must make selections. This date will have been chosen by your school. You will not be able to make or amend choices through SIMS Pay after this date although your child can still do so at daily dinner registration.

4. For each day, select the **Type of Meal** from the drop-down list. The options are **School Meal**, **Packed Lunch** and **Home**.

    ▪ If either **Packed Lunch** or **Home** is selected, no further action is required for that day.

    ▪ If **School Meal** is selected, the meal options for the day become available for selection.

NOTE: Vegetarian options are identified by a **V**.

5. Select a **Mains** meal by clicking the relevant option.

The selection changes colour to indicate it has been selected.

6. If available, select one of the **Desserts**.

NOTE: If **Desserts** are available, one must be selected otherwise you will be unable to save the choices.

Additional Information about the week's menu is displayed at the bottom of the page.

7. Once the selections for the week have been made, click the **Save Choices** button.

The **Menus** calendar page is displayed, indicating where meal choices have been made and where no choice has been expressed.

NOTE: Days can be skipped. You can complete meal choices at any time prior to the **Choices for this menu must be expressed by** date at the top of the week's selection page. After this date, the menu selection for the week is locked.

Dealing with Incomplete Meal Choices

If, after clicking the **Save Choices** button, the selection page does not close, check the page for **Choice required for** messages. If two courses are offered on a menu, you must select a main and a dessert otherwise you will be unable to save the choices.

1. Locate the incomplete meal selection message.
2. Complete the incomplete meal selection. Selections are highlighted.
3. Once you have completed any incomplete selections, click the **Save Choices** button.

Changing Menu Choices

You can change meal selections at any time prior to the **Choices for this menu must be expressed by** date at the top of the menu. After this date, the menu selection for the week is locked.

1. From **My Homepage**, click a child's name or their picture (if there is one) on the left-hand side of the page to display the selected child at the top of the group.

2. Click the **Menus** widget.

    The **Menus** calendar page is displayed, summarising where meal choices have been made. A tick indicates a meal choice has already been made for the day. A question mark indicates a choice is yet to be made.

3. Click anywhere in a week box to enable editing. The week's meal choices are displayed.

4. To substitute one school meal for another, locate the affected day and click in the new choice. The highlight changes to the new choice.

Thursday 18 Jan 2018

Type of Meal School Meal

Mains
- Roast pork, stuffing, apple sauce and gravy
- Roasted pepper flan with roast potatoes   V
- Jacket potato with tuna and sweetcorn

Desserts
- Peach pudding with vanilla sauce
- Frozen yogurt

5. If you want to substitute a school meal for either a **Packed Lunch** or **Home**, locate the affected day and select **School Meal** from the **Type of Meal** drop-down list.

Wednesday 17 Jan 2018

Type of Meal Home

Mains
- Special celebration meal
- Special vegetarian celebration meal   V

Desserts
- Special celebration dessert

6. The menu options for the day are then active and can be selected, as required.

7. If you want to substitute a **Packed Lunch** or **Home** for a school meal, locate the affected day and select **Packed Lunch** or **Home** from the **Type of Meal** drop-down list. The additional meal choices are no longer displayed.

8. If you want to add a choice for a day that has not previously had a preference expressed, locate the affected day and select an option.

9. Click the **Save Choices** button.

Attempting to make Meal Selections after the Choices were Required by Date has Passed

You can make or amend meal selections at any time before the menu's **Choices for this menu must be expressed by** date. After this date has passed, the menu selection for the week is locked. If you attempt to make or amend a menu selection after this date has passed, the **Choices for this menu were required by** message is displayed and it will not be possible to make or amend meal selections for this menu.

Checking the Meal Purchase History

A child's dashboard contains useful meal history information.

1. From **My Homepage**, click a child's name or their picture (if there is one) on the left-hand side of the page to display the selected child at the top of the group.

   The **Meal Purchase History** widget for the selected child is displayed in the centre of the screen.

2. Click the **Meal Purchase History** widget.

   The **Meal Purchase History** widget provides a quick overview of previous meal purchases.

3. Use the drop-down list to display purchases for **Last week**, **Last 2 weeks**, **Last 4 weeks** or **Last year**, then click the **Show** button.

   Meals purchased within the period specified are displayed.

Purchasing Products and Services

Your school will decide what products and services are available for you to purchase through SIMS Pay based on your child's class/year and activities.

> *TIP: **My Homepage** is displayed when you sign in. It is also available on the **My Homepage** tab on the top right-hand side of the screen (unless you are already on the home page).*

1. From **My Homepage**, click a child's name or their picture (if there is one) on the left-hand side of the page to display the selected child at the top of the group.
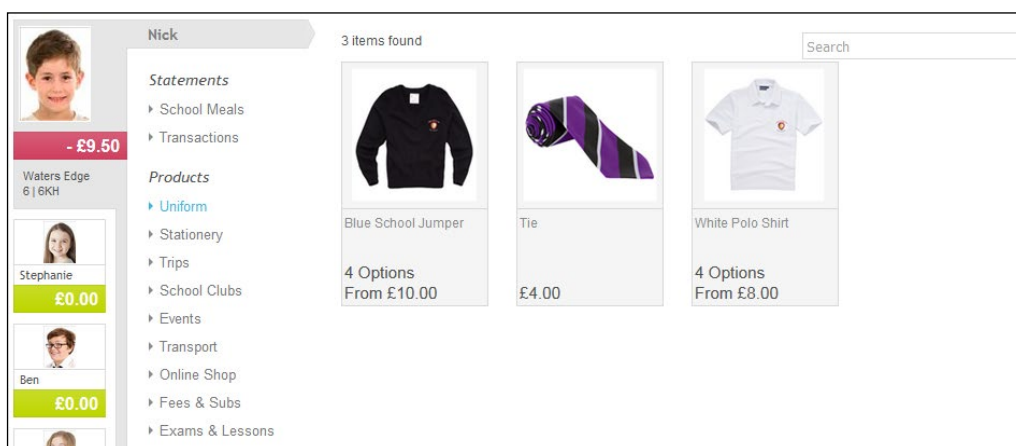
2. From the **Products** menu (displayed below the child's name), select a product or service to view the associated items.

3. Click an item to view more information.
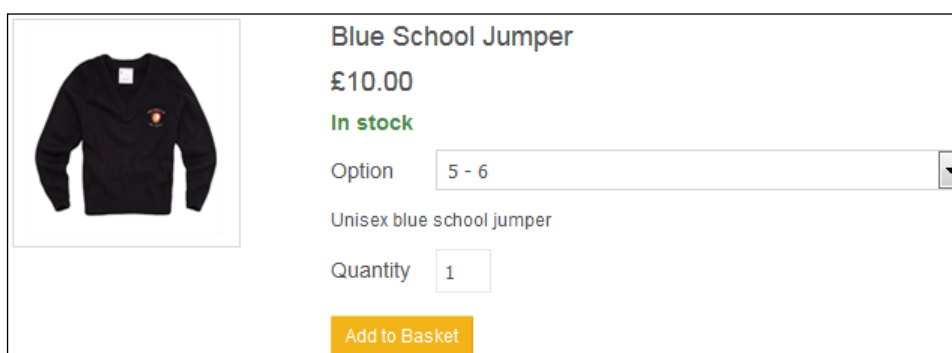
4. Select an **Option** from the drop-down list.

> ***IMPORTANT NOTE:** The nature of the **Option** you select will vary according to the selected product type. For example, a jumper that forms part of the school uniform might offer size options, colour options, etc.*

5. Enter a **Quantity** and click the **Add to Basket** button to send this item to the **My Basket** page and display this item on the **My Basket** tab.

NOTE: The school may place restrictions on the quantity that can be purchased.

An item that costs £10.00 will show on the **My Basket** tab as **£10.00 (1)**. The **(1)** indicates the number of items in the basket.
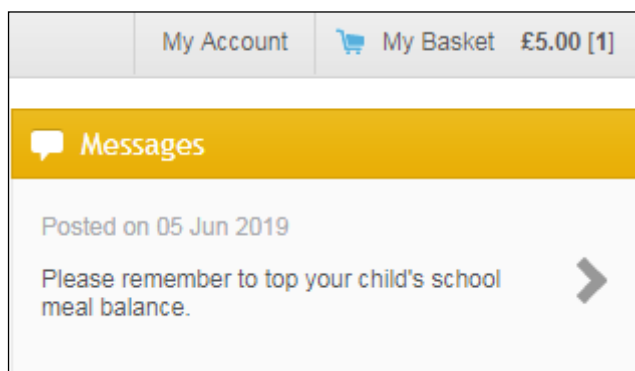
My Basket

The **My Basket** page shows all the items that are pending payment. Items can still be added to and deleted from the basket at this stage.

1. Select the **My Basket** tab on the top right-hand side of the screen to display the **My Basket** page.

Items are listed by child and product.

2. To change the amount you want to pay (for variable priced items only, such as school meals), enter a different value in the **Price** field and click the **Update** button. It is not possible to change the amount payable for fixed price items.

    ▪ To cancel the purchase, click the **Remove from basket** link (this is located below the **Product** name).

    ▪ Additional items can be added to your basket. Select the **My Homepage** tab and navigate to the required product or service (please see *Purchasing Products and Services* on page *32*).

3. Click the **Next** button to proceed to the **Payment Method** page (please see *Selecting the Payment Method* on page *34*).

Selecting the Payment Method

The **Payment Method** page allows you to select whether to pay for a purchase using a saved card or a new one <u>and</u> whether to save a new card for future use.

1. To use a saved card, select that card on the **Choose a payment method** list**.**

Where you have more than one card saved, individual cards can be identified by the last four digits of the card number.


*NOTE: Cards that have already expired and greyed out and labelled **Expired**.*

To use a new card, select either **Use another card (Save for future use)** or **Use another card (Do not save)**:

- **Use another card (Save for future use)** saves the card details for future use and adds the card to the list of cards displayed in **My Cards**.

- **Use another card (Do not save)** does <u>not</u> save the card details for future use.
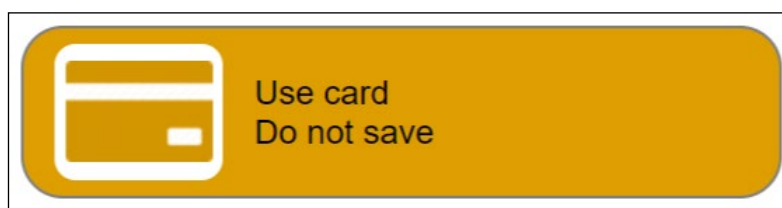
2. Click the **Checkout** button to display the **Secure Cashless Payments** page (please see *Checking Out* on page *35*).

Checking Out

If you chose a saved card, you will be prompted to verify your card details (please see *Using a Saved Card* on page *36*).

If you chose a new card, you will be prompted to provide your card details (please see *Using a New Card* on page *38*).

Using a Saved Card

> *NOTE: If you have recorded cardholder details on the **My Details** page, they will be displayed automatically.*

1. Verify your details on the **Additional Information** screen.

2. Enter your **Security Code**. The Security Code, or CCV (credit verification value) number, is a three-digit number on the back of the card, that provides an additional level of security for internet purchases.
3. Click the **Continue** button to display the **Payment Confirmation** page.

Payment Confirmation Page

You are about to make a payment for the transaction shown below. Please check that these details are correct and then either click on the "Make Payment" button to continue with your payment or click on "Back" if any details need to be amended.

Once you click on "Make Payment" your transaction will be authorised on-line. This will typically take about six seconds but various factors can affect the actual time taken.

Please refrain from clicking on any other browser buttons or navigating to other sites while this process takes place. If the process stops responding for any reason then we recommend that you simply close your browser.

PURCHASE DETAILS

PLEASE CHECK THAT THE PURCHASE DETAILS BELOW ARE CORRECT

Any free products you've added to your basket will not appear on the below list

Product	Quantity	Total
School Meal	1	£5.00
TOTAL		£5.00

Card Details

Please check that your card details are correct

Card Number	***********0000
Cardholder	Mr Jonas Aaron
Expiry Date	01/25

Back   Make Payment

4. Click the **Make Payment** button to confirm the transaction and to display the **Confirmation** page.

5. If required, verify your purchase with your card provider.

3 D Secure Authorisation

Verified by **VISA**

learn more

Added Protection

Please enter your password below

Merchant	Merchant.Com
Amount	5.00
Date	20190710 13:39:55
Card number	***********0000
Password	

Continue   Cancel

A summary of your payment is displayed on the **Confirmation** tab.

You can view your payments under **My Payments** on the **My Account** tab (please see *Viewing My Payments* on page *19*).

Using a New Card

1. Enter your card details on the **Secure Online Payments** screen.

2. Click the **Continue** button to display the **Additional Information** screen.

3. Complete the required details and click the **Continue** button to display the **Payment Confirmation** page.

4. Click the **Make Payment** button to confirm the transaction and to display the **Confirmation** page.

5. If required, verify your purchase with your card provider.

A summary of your payment is displayed on the **Confirmation** tab.

If you selected **Use another card (Save for future use)**, you will see the following advice: **As required your card has been saved for future and can be managed in My Cards**. The details of the card are now available under the **My Cards** menu (please see *Managing your Cards* on page *20*).

Payment Card Statement

Payments are processed on behalf of your school by Pay360 by Capita. On your card statement, you will see **PAY360 <SCHOOLNAME>**.

Paying with PayPoint or at the Post Office

If a person with parental responsibility does not wish or cannot use SIMS Pay to pay online for school items, it is possible to pay for items using PayPoint or at the Post Office.

1. Contact your child's school to request barcodes for the items you wish to purchase.

2. Your child's school will provide a printed barcode for each item requested (each item has a unique barcode).

3. Take the barcodes to your PayPoint or Post Office counter.

   Inform the cashier if you wish to purchase more than one of any item, as these will be scanned separately.

4. The cashier will scan the barcodes and take payment for the items.

   - Some items will be fixed price, e.g. uniform.
   - Some items, e.g. school meals will require you to notify the cashier of how much you intend to pay.

5. If the payment is for school meals, it will show in the **Statements** section of your account immediately (please see *Viewing Transaction Statements* on page *42*).

> **IMPORTANT NOTE:** *Payments made by barcode cannot be assigned to an account holder and will therefore only be displayed in the **School Meal Statement** or **Transaction Statement** screens. The **Payer** will be displayed as **Other**.*

Viewing School Meal Statements

Payments shown on this page are for all account holders. Payments made by the person signed in are shown in the **Payer** column as **self** and payments made by anyone else are shown in the **Payer** column as **other**.

> *TIP: **My Homepage** is displayed when you sign in. It is also available on the **My Homepage** tab on the top right-hand side of the screen (unless you are already on the home page).*

1. From **My Homepage**, click a child's name or their picture (if there is one) on the left-hand side of the page to display the selected child at the top of the group.

2. Select **School Meals** from the **Statements** menu under the child's name.

The **Current Balance** and any payments made during the period will be displayed. The default period is **Last week**. It is possible to change the period by selecting from the drop-down list and clicking the **Show** button.

Viewing Transaction Statements

Payments shown on this page are for all account holders. Payments made by the person signed in are displayed in the **Payer** column as **self** and payments made by anyone else are displayed in the **Payer** column as **other**.

> *TIP: **My Homepage** is displayed when you sign in. It is also available on the **My Homepage** tab on the top right-hand side of the screen (unless you are already on the home page).*

1. From **My Homepage**, click a child's name or their picture (if there is one) on the left-hand side of the page to display the selected child at the top of the group.

2. Select **Transactions** from the **Statements** menu under the child's name.

The **Transactions** made during the period will be displayed. The default period is **Last week**. It is possible to change the period by selecting from the drop-down list and clicking the **Show** button.

Paying Fees

SIMS Pay enables parent/guardians to pay school Fees through the **Fees Balance** widget.

Where schools have integrated SIMS Pay with Fees Billing, the **Fees Balance** widget displays the amount for which the parent/guardian has been billed. The widget states the amount you owe.

> *TIP:* **My Homepage** *is displayed when you sign in. It is also available on the* **My Homepage** *tab on the top right-hand side of the screen (unless you are already on the home page).*

1. From **My Homepage**, click a child's name or their picture (if there is one) on the left-hand side of the page to display the selected child at the top of the group.

2. Enter the amount in the **Enter Amount** field.
3. Click the **Add to Basket** button to send this item to the **My Basket** page and display this item on the **My Basket** tab.
4. Proceed to checkout (please see *My Basket* on page *33*).
5. Checkout (please see *Checking Out* on page *35*) to complete the payment.

   Once the full payment has been processed by SIMS the **Fees Balance** widget clears the amount owed and turns green.

03| **Additional Information**

SIMS Pay Security

SIMS Pay operates inside of secure parameters to protect both financial information and personal/child information.

- SIMS Pay can be accessed only after the successful completion of various security steps.
- <u>No</u> card details are stored in SIMS Pay.
- <u>No</u> card details are ever disclosed to the school.
- SIMS Pay is PCI DSS Level 1 certified and uses the highest levels of card payment security and 3D fraud protection measures.
- You will receive an email receipt for <u>all</u> payments.
- Payment history is available via your account.
- SIMS Pay is synchronised with the main SIMS system to ensure that all account holders have up-to-date Parental Responsibility permissions.
- SIMS Pay flags account holders whose parental responsibility information has been removed from the school's main SIMS system. This also applies to parent/guardians who have a current court order recorded against them in SIMS. Account holders who are not flagged as having parental responsibility for a child (and therefore do not qualify for a new SIMS Pay account) can still sign in to SIMS Pay but <u>cannot</u> view any child details, or purchase products or services.

Cookie Policy

A small number of cookies are used to provide the features on the website and to help us to improve its performance.

We operate an 'implied consent' policy, which means that we assume that you are happy with this usage. If you are not happy with this, then you should either not use this site, or you should delete the cookies after you have visited the site, or you should browse the site using your browser's anonymous usage setting. The name of this setting varies depending on the web browser:

- Incognito (Google Chrome)
- InPrivate (Internet Explorer)
- Private Browsing (Firefox and Safari).

For more information on cookies, you are advised to visit the About Cookies website (http://www.aboutcookies.org).

The following table describes the cookies we use on this site.

Cookie Name	Purpose
_ga	Google Analytics tracking
_gat	Google Analytics throttling
_gid	Google Analytics identity
ASP.NET_SessionsId	Used to identify a user's session
SimsIdAuth	Used to track the current signed in SIMS ID Account
_RequestVerificationToken_Lw_	Cross-site request forgery prevention
cookies-consented	Used to confirm that the user has consented to cookies

Technical Requirements

To use SIMS Pay, your system must meet the following minimum specifications:

Internet Connection

A minimum network connection speed of 512Kbps is required to operate SIMS Pay.

> *NOTE: Bandwidth tests performed on a 'client PC' should return results of at least 0.5Mbps or 512Kbps.*

Supported Browsers

PC users:

- Internet Explorer® version 10 or later with the latest service packs
- Firefox® - latest version
- Chrome® - latest version.

MAC users:

- Firefox - latest version
- Safari® - latest version.

FAQ

Invitation Code Has Expired

Your registration invitation specifies the date by which registration must take place. If the invitation code you have received from your School Administrator does not work, please contact your school.

Can't Access SIMS Pay?

If you have already set up your account and are encountering problems when attempting to access SIMS Pay, check that you are signed in to the correct account from one of our supported identity providers. This is particularly important where a computer has multiple users.

Navigate to the identity provider's website, sign out of your account and then sign in again with your account credentials.

If you continue to experience problems when attempting to sign in to your SIMS Pay account, please contact your School Administrator.