



# **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 <i>SIMS Pay for Customers</i> . Capita Doc Ref had to MGPayCustomer.  Updated the <i>Registering your Account</i> and <i>Signing In</i> topics for new SIMS ID screens.	04/02/2019
2.1	New SIMS Pay home page graphic.	18/02/2019
2.2	<i>Paying Fees</i> topic added for schools using SIMS Fees Billing.	10/07/2019
2.3	Added the <i>Managing your Cards</i> , <i>Deleting a Saved Card</i> , <i>Re-ordering the List of Cards</i> , <i>Selecting the Payment Method</i> , <i>Using a Saved Card</i> , <i>Using a New Card</i> and <i>Payment Card Statement</i> topics to the <i>Using SIMS Pay</i> chapter. Updated the <i>Welcome to SIMS Pay</i> , <i>Viewing My Payments</i> , <i>My Basket</i> and <i>Checking Out</i> topics.	28/01/2020

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### 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:

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

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# 01 | Getting Started with SIMS Pay

<b>Welcome to SIMS Pay .....</b>	<b>1</b>
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## 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 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

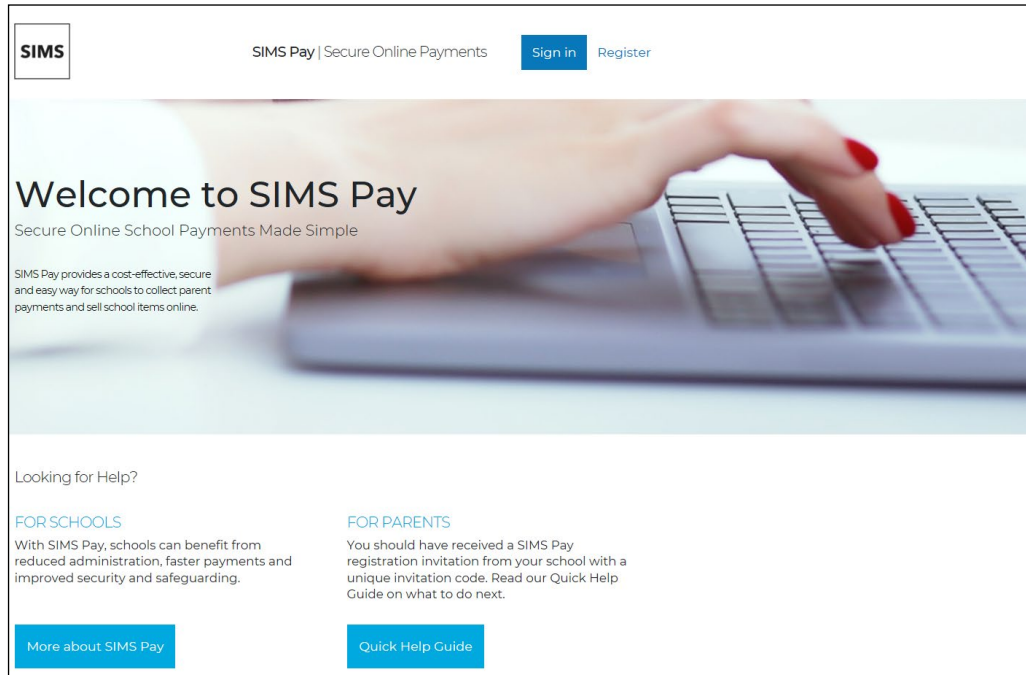
## Registering your Account

The registration process for the following customers is the same:

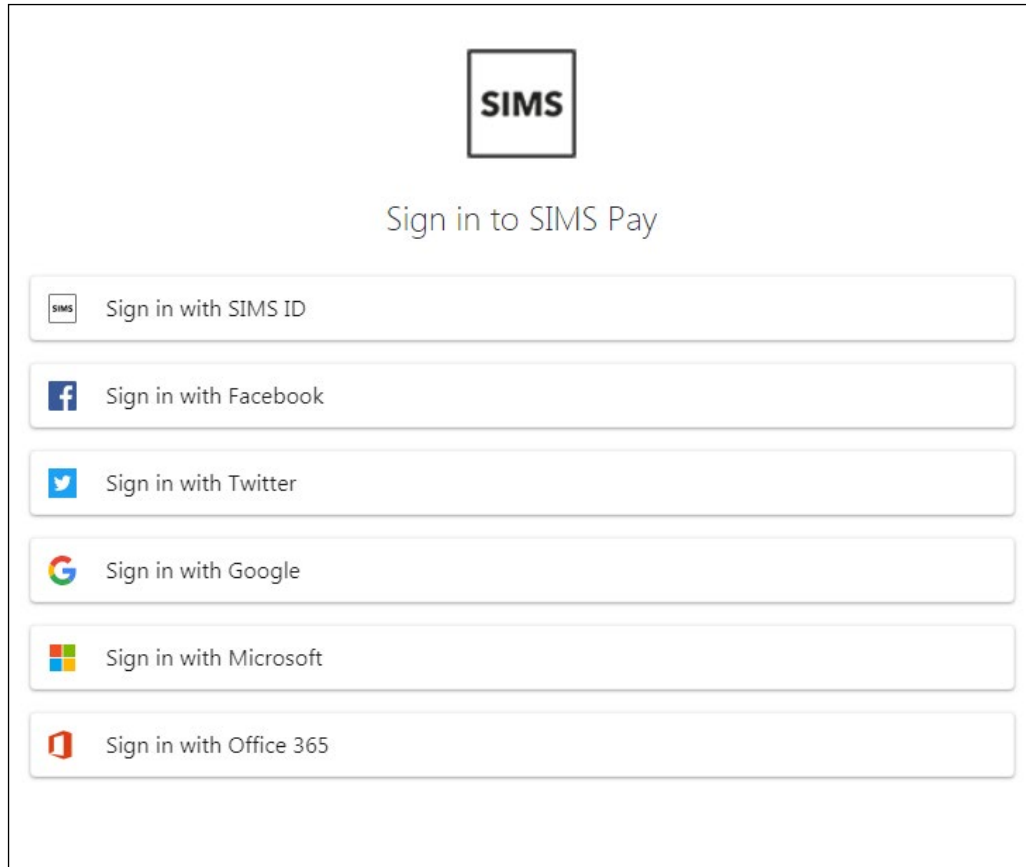
- the parent/guardian of a child(ren) at the school,
- a school employee who may also be the parent/guardian of a child(ren) at the school,
- an administrator of SIMS Pay who is a school employee and who may also be the parent/guardian of a child(ren) at the school.

## 01 | Getting Started with SIMS Pay

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.

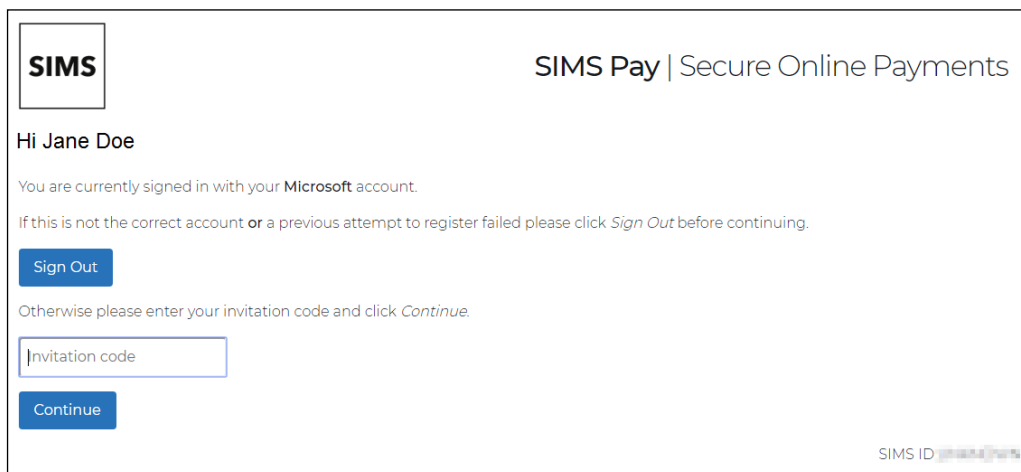




**NOTE:** If you see the **Account Welcome** page instead of the **Sign in to SIMS Pay** page, review the guidance (please see Account Welcome Page on page 11).

**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.



**SIMS** SIMS Pay | Secure Online Payments

Hi Jane Doe

You are currently signed in with your **Microsoft** account.

If this is not the correct account or a previous attempt to register failed please click *Sign Out* before continuing.

**Sign Out**

Otherwise please enter your invitation code and click *Continue*.

Invitation code

**Continue**

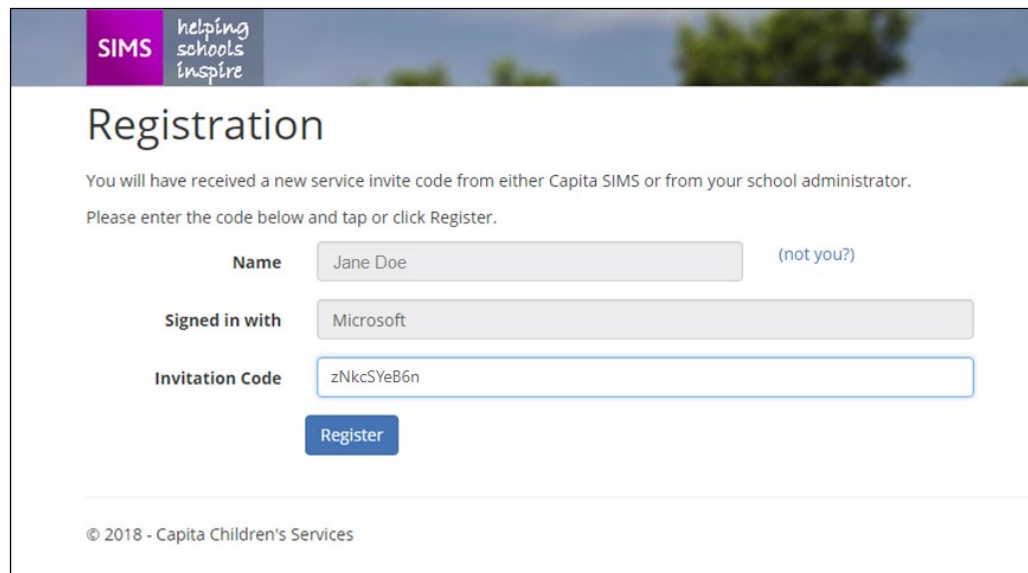
SIMS ID

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).

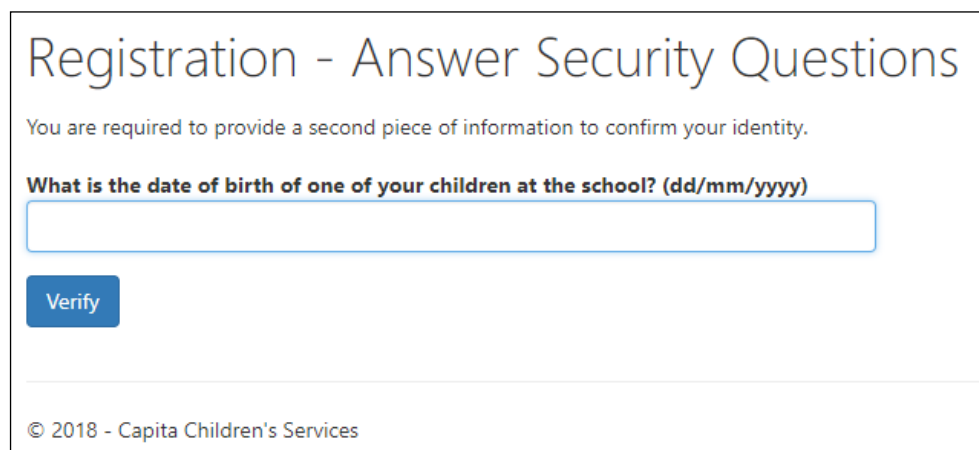
## Registration

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.

The screenshot shows the SIMS Registration page. At the top, there is a header with the SIMS logo and the tagline 'helping schools inspire'. Below the header, the title 'Registration' is displayed. A message states: 'You will have received a new service invite code from either Capita SIMS or from your school administrator. Please enter the code below and tap or click Register.' The form contains three fields: 'Name' with the value 'Jane Doe' and a '(not you?)' link; 'Signed in with' with the value 'Microsoft'; and 'Invitation Code' with the value 'zNkcSYeB6n'. A blue 'Register' button is located below the Invitation Code field. At the bottom, there is a copyright notice: '© 2018 - Capita Children's Services'.

1. Click the **Register** button.

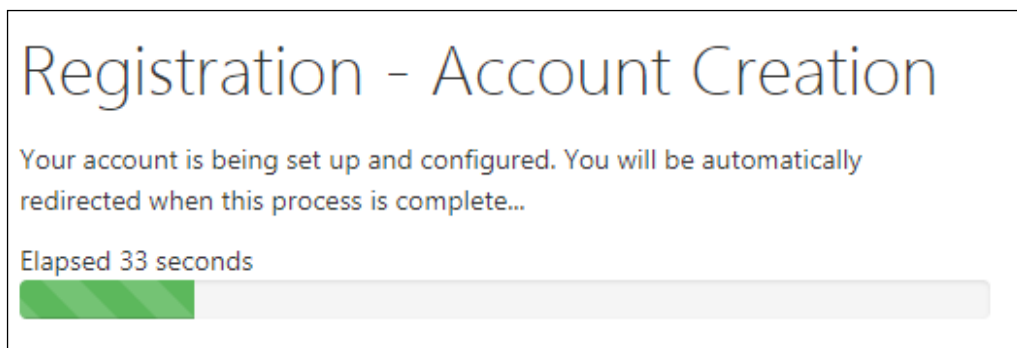
The screenshot shows the SIMS Registration - Answer Security Questions page. The title is 'Registration - Answer Security Questions'. A message states: 'You are required to provide a second piece of information to confirm your identity.' Below this, a question is displayed: 'What is the date of birth of one of your children at the school? (dd/mm/yyyy)'. There is a text input field for the answer. A blue 'Verify' button is located below the input field. At the bottom, there is a copyright notice: '© 2018 - Capita Children's Services'.

*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).

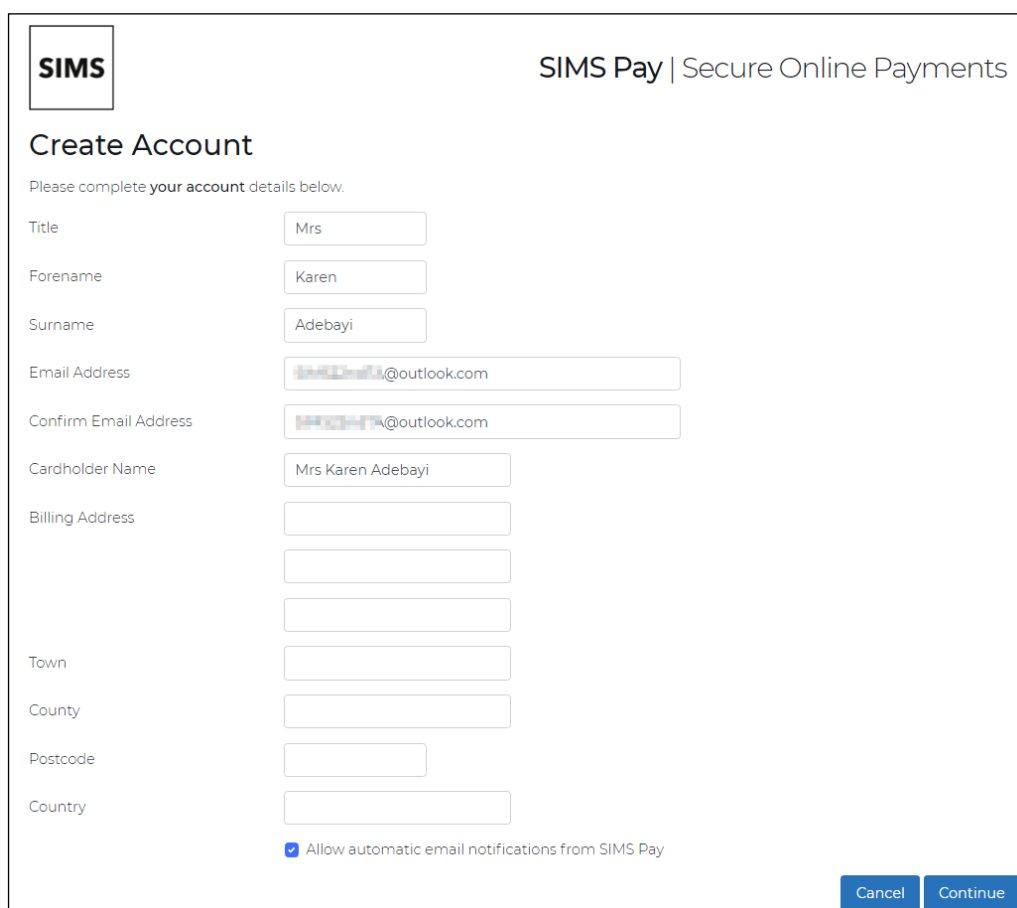
## Confirming Account Details in SIMS Pay

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 first 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.

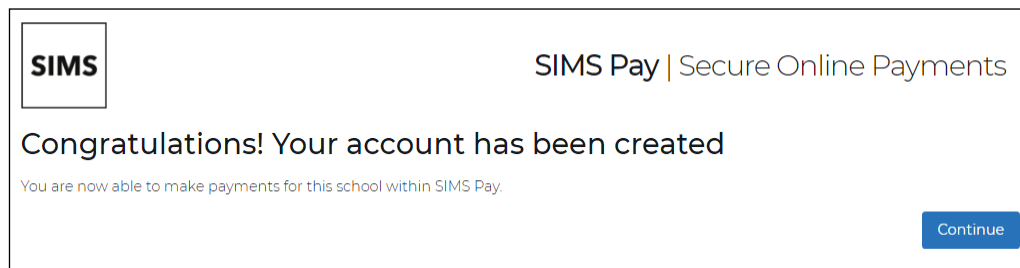


The screenshot shows the 'SIMS Pay | Secure Online Payments' 'Create Account' form. The SIMS logo is in the top left. The title 'Create Account' is centered. Below it, a message says 'Please complete your account details below.' The form fields are: Title (Mrs), Forename (Karen), Surname (Adebayi), Email Address (karen.adebayi@outlook.com), Confirm Email Address (karen.adebayi@outlook.com), Cardholder Name (Mrs Karen Adebayi), Billing Address (four empty lines), Town (empty), County (empty), Postcode (empty), and Country (empty). At the bottom, there is a checked checkbox for 'Allow automatic email notifications from SIMS Pay' and 'Cancel' and 'Continue' buttons.

- 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.

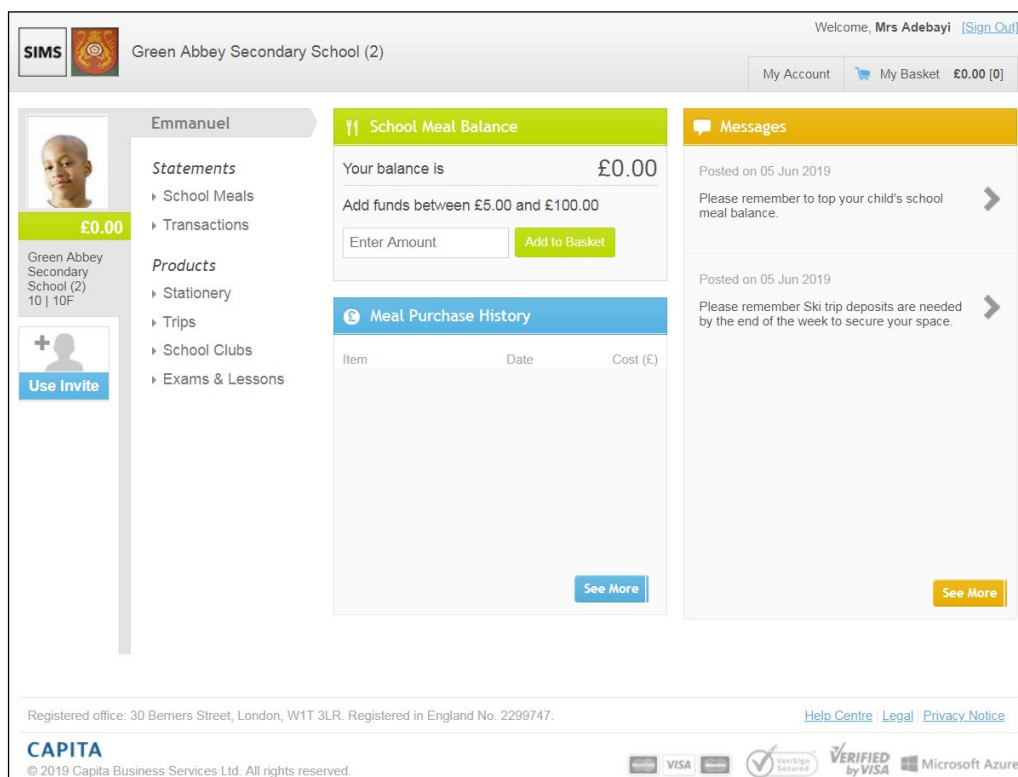


**NOTE: If you are also an administrator, this message will read *You are now able to administer this school and make payments for this school within SIMS Pay.***

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

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

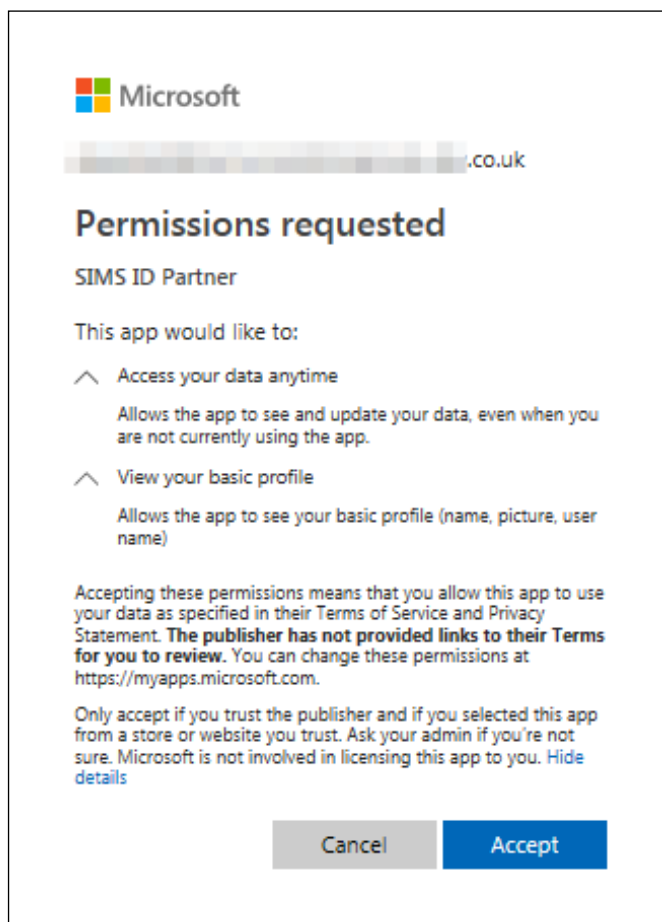
If you are an administrator, SIMS Pay opens at the **Dashboard**. For all other users, SIMS Pay opens at **My Homepage**. You can now use SIMS Pay.



## 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).

**SIMS**

SIMS Pay | Secure online payments

Account Welcome

Hi John Smith; welcome to SIMS Pay!

**First time using SIMS Pay?**

If this is your first time using SIMS Pay you will need to register your account.

- Before you register, check that the **Microsoft** account **John Smith** is the one you want to use with SIMS Pay.
- For security, you will need the **Invitation Code** issued by your school and the **Date of Birth** of one of the persons listed in the invitation.
- An **Invitation Code** must only be used by the person to whom it was issued.

**Ready to register your account?**

Please click on the **Register** button below to get started with your SIMS Pay account registration.

**Register**

**Already have a SIMS Pay account?**

Make sure you are using the correct account to access SIMS Pay. You are currently signed in with the **Microsoft** account **John Smith**.

To sign out of the current account, click on the **Sign Out** button below.

**Sign Out**

Still having trouble signing into your account? First try the [quick help guide](#); if that doesn't solve your problem, please contact your school.

SIMS ID:18833

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.





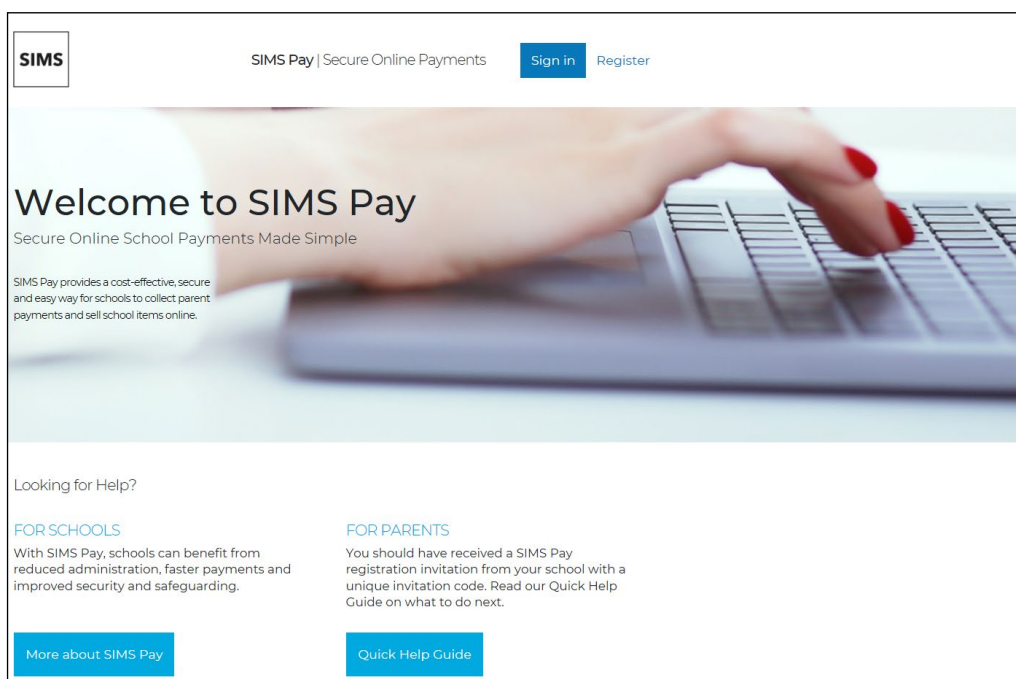
## 02 | Using SIMS Pay

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### 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**.

The screenshot shows the 'My Account' page for a user named Michael. The page is divided into several sections:

- Header:** My Account, My Basket £0.00 [0]
- User Profile:** Michael, Tenant 95 School 1 | OAK, £0.00, Use Invite button.
- Statements:** School Meals, Transactions.
- Products:** Uniform, Stationery, Trips, School Clubs, Events, Transport, Online Shop, Fees & Subs, Exams & Lessons.
- School Meal Balance:** Your balance is £0.00. Add funds between £5.00 and £100.00. Enter Amount, Add to Basket button.
- Menus:** See available choices here, right arrow button.
- Meal Purchase History:** See details here, right arrow button.
- Messages:** No messages currently available, right arrow button.
- Footer:** Registered office: 71 Victoria Street, Westminster, London, SW1H 0XA, Registered in England No. 2299747. CAPITA © 2013 Capita plc. All rights reserved. Logos for Visa, Mastercard, VeriSign Secure, VERIFIED by VISA, and Microsoft Azure.

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

The screenshot shows the 'My Account' page for a user named Jason. The page is divided into several sections:

- Header:** My Account, My Basket £0.00 [0]
- User Profile:** Jason, Red Abbey School Year 4 | 4B, + £26.60, Use Invite button.
- Statements:** School Meals, Transactions.
- Products:** Uniform, Stationery, Trips, Events, Transport.
- School Meal Balance:** Your balance is £0.00. Add funds between £0.01 and £999.99. Enter Amount, Add to Basket button.
- Fees Balance:** In credit £0.00. Last updated at 30 Apr 2019 14:47. Add funds between £0.01 and £999.99. Enter Amount, Add to Basket button.
- Meal Purchase History:** Table with columns: Item, Date, Cost (£). See More button.
- Messages:** No messages.

*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.

The screenshot shows the 'My Details' page. On the left is a sidebar with links: 'My Details' (active), 'My Links', 'My Schools', and 'My Payments'. The main area has a blue header 'My Details' with a note 'mandatory fields marked with a \*'. The form contains the following fields:

- Title \*: Mrs
- Forename \*: Kimberly
- Surname \*: Ackton
- Email Address \*: [redacted]@outlook.com
- Confirm Email Address \*: [redacted]@outlook.com
- Cardholder Name: Mrs Kimberly Ackton
- Billing Address: 12 High Street, Higham Ferrers
- Town: Rushden
- County:
- Postcode: NN10 8BL
- Country:
- ☒ Allow automatic email notifications from SIMS Pay

At the bottom right are 'Cancel' and 'Save Changes' buttons.

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 not 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.

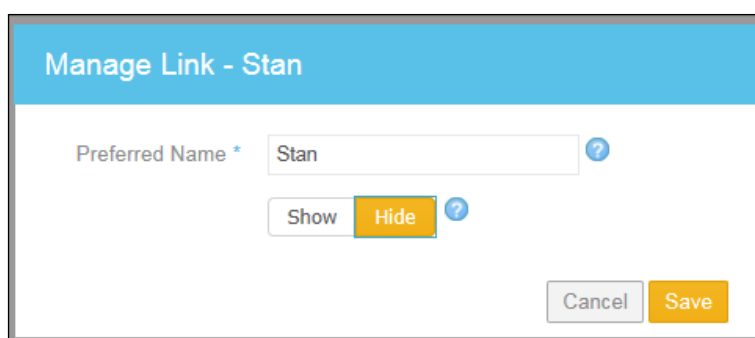
## Re-instating a Previously Hidden Link

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



The image shows a 'Manage Link - Stan' form. It has a blue header bar with the title. Below the header, there is a text input field for 'Preferred Name \*' containing the text 'Stan'. To the right of the input field is a blue question mark icon. Below the input field are two buttons: 'Show' and 'Hide'. The 'Hide' button is highlighted in orange. To the right of these buttons is another blue question mark icon. At the bottom right of the form are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted in orange.

2. Click the **Show** button.

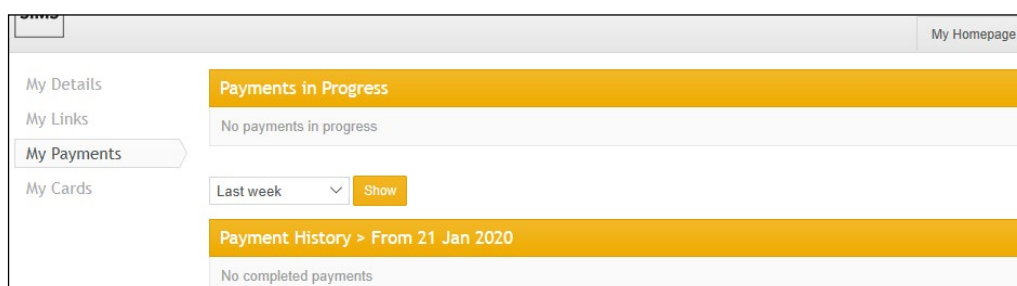
Links that are not hidden are displayed on the **My Links** page with a yellow heading.

## Viewing My Payments

Viewing payments from the **My Account** tab will show all payments made via your account. It will not 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.



The image shows the 'My Payments' screen. On the left is a sidebar menu with options: 'My Details', 'My Links', 'My Payments' (which is highlighted with a grey arrow), and 'My Cards'. The main content area has a top bar with 'My Homepage' on the right. Below this, there is a yellow header bar for 'Payments in Progress'. Underneath, it says 'No payments in progress'. There is a dropdown menu set to 'Last week' and a 'Show' button. Below this is another yellow header bar for 'Payment History > From 21 Jan 2020'. Underneath, it says 'No completed payments'.

- **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**.

- 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
<a href="#">255082970</a>	02 Feb 2018	VISA *0437	£35.75
<a href="#">255082969</a>	02 Feb 2018	VISA *0437	£20.00

Each transaction within the selected time period is displayed.

- 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:

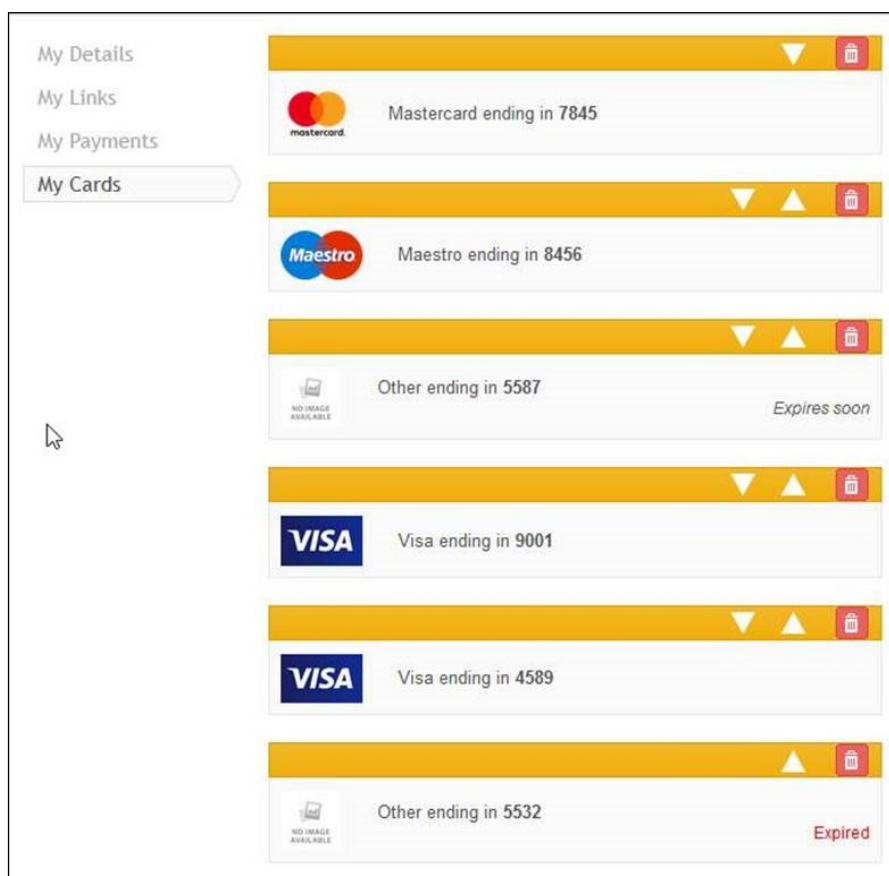
- Control the display order of cards during the checkout process by moving cards higher or lower on the display order.
- Delete cards.
- Identify any cards that have expired or are due to expire in the next thirty days.



**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.

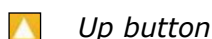


*Delete button*

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.



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.



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 screenshot shows the SIMS Pay interface for a user named Emmanuel at Green Abbey Secondary School (2). The page is titled 'Welcome, Mrs Adebayi' and includes a 'Sign Out' link. The main content area is divided into three columns. The left column shows the user's profile picture and a 'Use Invite' button. The middle column displays the 'School Meal Balance' as £0.00, with a section for 'Add funds between £5.00 and £100.00' and an 'Add to Basket' button. Below this is a 'Meal Purchase History' table with columns for Item, Date, and Cost (£). The right column contains a 'Messages' section with two messages from 05 Jun 2019. The footer includes the school's registered office address, contact information, and logos for Capita, Visa, Mastercard, and Microsoft Azure.

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.

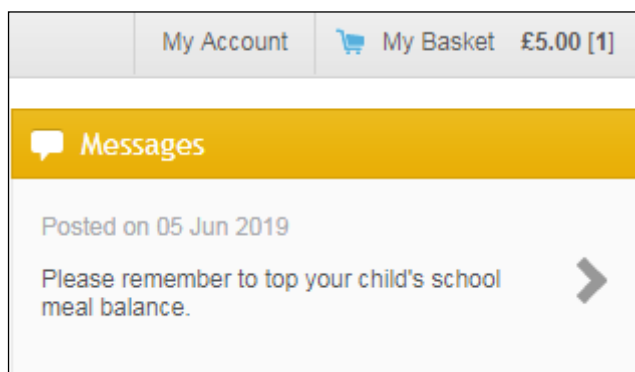
**NOTE:** If a **School Meal Balance** falls below the threshold set by the school and you have enabled email notifications, you will receive an email notification from the school. The negative **School Meal Balance** in SIMS Pay will be displayed with a red heading until funds are added and the balance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

The screenshot shows the SIMS Pay interface for a user with a negative 'School Meal Balance' of -£9.50. The page is titled 'School Meal Balance' and includes a 'Sign Out' link. The main content area is divided into three columns. The left column shows the user's profile picture and a 'Use Invite' button. The middle column displays the 'School Meal Balance' as -£9.50, with a section for 'Add funds between £5.00 and £100.00' and an 'Add to Basket' button. Below this is a 'Meal Purchase History' table with columns for Item, Date, and Cost (£). The right column contains a 'Messages' section with two messages from 05 Jun 2019. The footer includes the school's registered office address, contact information, and logos for Capita, Visa, Mastercard, and Microsoft Azure.

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

- 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.

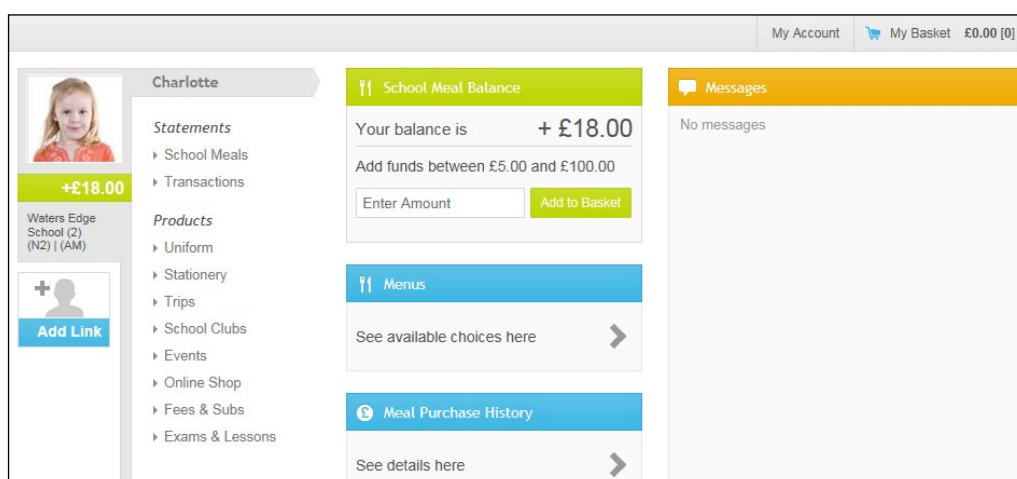


## Selecting School Meals

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.

- 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.



- Click the **Menus** widget.  
The **Menus** calendar page displays weeks where meal selections can be made.

<b>19 Feb 2018</b> Spring Term Week 2 <div> <div>M</div><div>T</div><div>W</div><div>T</div><div>F</div> <div>?</div><div>?</div><div>?</div><div>?</div><div>?</div> </div>	<b>26 Feb 2018</b> Spring Term Week 3 <div> <div>M</div><div>T</div><div>W</div><div>T</div><div>F</div> <div>?</div><div>?</div><div>?</div><div>?</div><div>?</div> </div>
<b>05 Mar 2018</b> Spring Term Week 4 <div> <div>M</div><div>T</div><div>W</div><div>T</div><div>F</div> <div>?</div><div>?</div><div>?</div><div>?</div><div>?</div> </div>	

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.

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

Choices for this menu must be expressed by 14 Jan 2018.

**Monday 15 Jan 2018** ?

Type of Meal

Mains
 

Award winning pork sausages with gravy and mash  
 Quorn sausage with gravy and mash  
 Salmon salad wrap

Desserts
 

Chocolate surprise cake with organic milk  
 Organic yogurt

**Tuesday 16 Jan 2018** ?

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.

- 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.

Type of Meal	School Meal	▼
Mains	<div>Award winning pork sausages with gravy and mash</div> <div>Quorn sausage with gravy and mash <b>V</b></div> <div>Salmon salad wrap</div>	
Desserts	<div>Chocolate surprise cake with organic milk</div> <div>Organic yogurt</div>	

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

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

Type of Meal	School Meal	▼
Mains	<div>Award winning pork sausages with gravy and mash</div> <div>Quorn sausage with gravy and mash <b>V</b></div> <div>Salmon salad wrap</div>	
Desserts	<div>Chocolate surprise cake with organic milk</div> <div>Organic yogurt</div>	

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.

Additional Information
Salad bar available subject to the style of service. Some menus or items on the menu are subject to change. All vegetables are seasonal.
<div>Cancel</div> <div>Save Choices</div>

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.

<b>15 Jan 2018</b> Spring Term Week 2 M T W T F ✓ ✓ ✓ ✓ ✓	<b>22 Jan 2018</b> Spring Term Week 2 M T W T F ✓ ✓ ? ✓ ✓
<b>29 Jan 2018</b> Spring Term Week 2 M T W T F ? ? ? ? ?	

*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.

Type of Meal: School Meal

Mains
 

Award winning pork sausages with gravy and mash  
 Quorn sausage with gravy and mash  
 Salmon salad wrap

Desserts
 

Organic yogurt

Choice required for: Mains and Desserts

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.


The screenshot shows the 'Menus' calendar page for a child named Charlotte. The page has a top navigation bar with 'My Homepage', 'My Account', and 'My Basket £0.00 [0]'. On the left, there's a sidebar with Charlotte's profile picture, a balance of '+£18.00', and a list of menu categories: Statements (School Meals, Transactions), Products (Uniform, Stationery, Trips, School Clubs, Events, Online Shop, Fees & Subs, Exams & Lessons), and an 'Add Link' button. The main area displays three calendar boxes for 'Spring Term Week 2':  
 - 15 Jan 2018: M (✓), T (✓), W (✓), T (✓), F (✓)  
 - 22 Jan 2018: M (✓), T (✓), W (?), T (✓), F (✓)  
 - 29 Jan 2018: M (?), T (?), W (?), T (?), F (?)

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

The screenshot shows the meal selection form for Thursday 18 Jan 2018. At the top, it says 'Thursday 18 Jan 2018' with a green checkmark icon. Below this, there's a 'Type of Meal' dropdown menu set to 'School Meal'. Under the 'Mains' section, there are three options: 'Roast pork, stuffing, apple sauce and gravy' (highlighted in orange), 'Roasted pepper flan with roast potatoes' (with a 'V' icon), and 'Jacket potato with tuna and sweetcorn'. Under the 'Desserts' section, there are two options: 'Peach pudding with vanilla sauce' (highlighted in orange) and 'Frozen yogurt'.



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


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

Mains

Special celebration meal	
Special vegetarian celebration meal	V

Desserts

Special celebration dessert
-----------------------------

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

Wednesday 17 Jan 2018

Type of Meal: School Meal

Mains: Special vegetarian celebration meal

Desserts: Special celebration dessert

- 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.
- 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.

Additional Information

Salad bar available subject to the style of service. Some menus or items on the menu are subject to change. All vegetables are seasonal.

Cancel Save Choices

- 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.

Choices for this menu were required by 21 Jan 2018.

Monday 22 Jan 2018

Type of Meal: School Meal

Mains: Quorn sausage with gravy and mash

## 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.

The screenshot shows a user interface for a child named Charlotte. On the left, there's a profile picture and a balance of +£18.00. Below that, there's a list of menu items: School Meals, Transactions, Uniform, Stationery, Trips, School Clubs, Events, Online Shop, Fees & Subs, and Exams & Lessons. In the center, there's a 'School Meal Balance' section showing the balance and an 'Add to Basket' button. Below that, there's a 'Menus' section with a 'See available choices here' link. At the bottom, there's a 'Meal Purchase History' section with a 'See details here' link. On the right, there's a 'Messages' section with 'No messages'.

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

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

The screenshot shows the 'Meal Purchase History' widget for Charlotte. At the top, there's a dropdown menu set to 'Last year' and a 'Show' button. Below that, there's a table titled 'Meal Purchase History > From 11 Jan 2017'. The table has three columns: Item, Date, and Cost. It displays one entry: Red Meal on 04 Sep 2017 for £2.00.

Item	Date	Cost
Red Meal	04 Sep 2017	£2.00

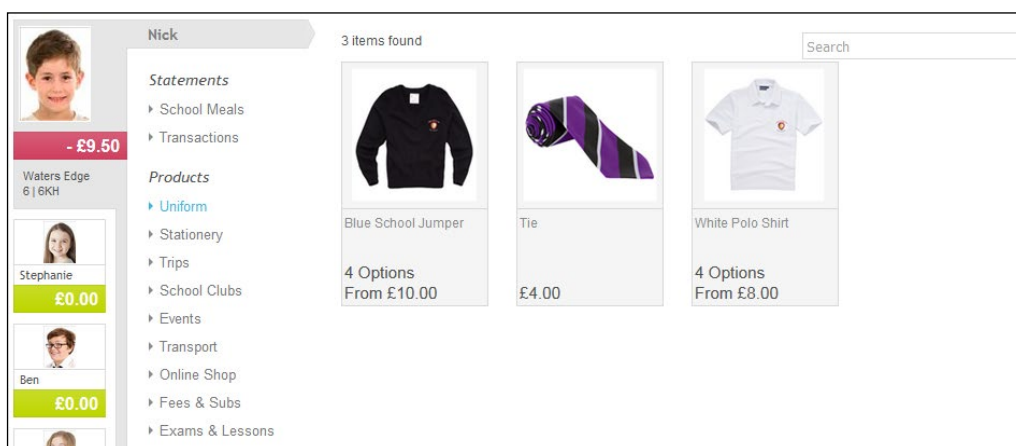
3. Use the drop-down list to display purchases for **Last week**, **Last 2 weeks**, **Last 4 weeks** or **Last year**, then click the **Show** button. Meals purchased within the period specified are displayed.

## Purchasing Products and Services

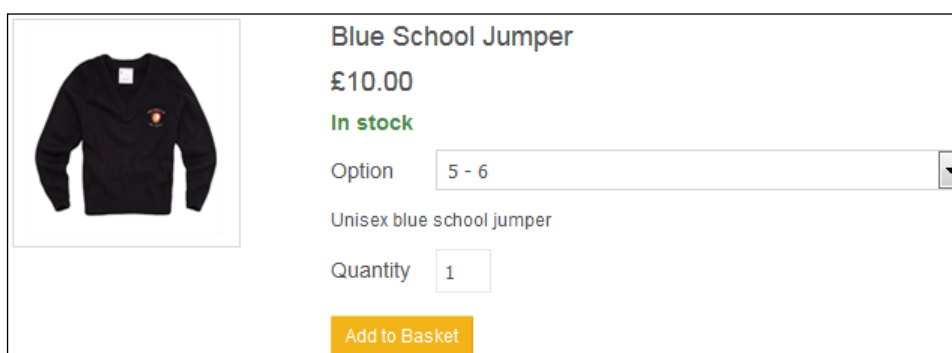
Your school will decide what products and services are available for you to purchase through SIMS Pay based on your child's class/year and activities.

**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.



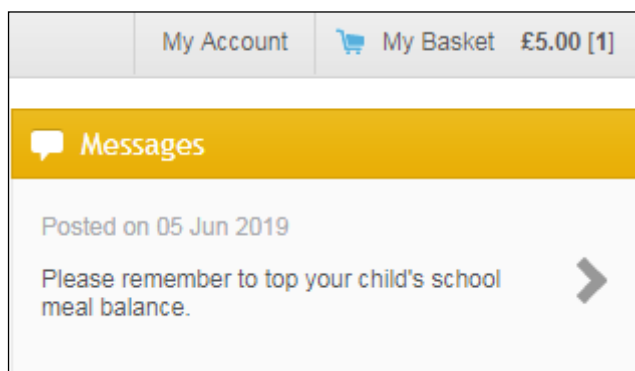
4. Select an **Option** from the drop-down list.

**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.

Carl at Blue				
Product	Quantity	Price	Cost	
<div> NO IMAGE AVAILABLE</div> <div><a href="#">School Jumper (Large)</a> <a href="#">Remove from basket</a></div>	<div>1</div> <div>Update</div>	£10.00	£10.00	
<div></div> <div>School Meals <a href="#">Remove from basket</a></div>	1	<div>10.00</div> <div>Update</div>	£10.00	
<div> NO IMAGE AVAILABLE</div> <div><a href="#">School Polo Shirt (Medium)</a> <a href="#">Remove from basket</a></div>	<div>2</div> <div>Update</div>	£5.50	£11.00	
Tina at Blue				
Product	Quantity	Price	Cost	
<div></div> <div>School Meals <a href="#">Remove from basket</a></div>	1	<div>6.00</div> <div>Update</div>	£6.00	
Steve at Green				
Product	Quantity	Price	Cost	
<div></div> <div>School Meals <a href="#">Remove from basket</a></div>	1	<div>9.00</div> <div>Update</div>	£9.00	
			Total Cost for 6 items	
			£46.00	
			Next	

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 and 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.

The screenshot shows the 'Choose a payment method' page in the SIMS Pay system. The top navigation bar includes the SIMS logo, a welcome message for Mr Aaron, and links to My Homepage, My Account, and My Basket (showing £5.00 [1]). The left sidebar has tabs for My Basket, Payment Method (selected), Payment, and Confirmation. The main content area lists four payment options: a greyed-out Visa card ending in 0000 marked 'Expired', a valid Visa card ending in 0437, and two options to use a new card (one without saving, one with saving). At the bottom, there are 'Back' and 'Checkout' buttons.

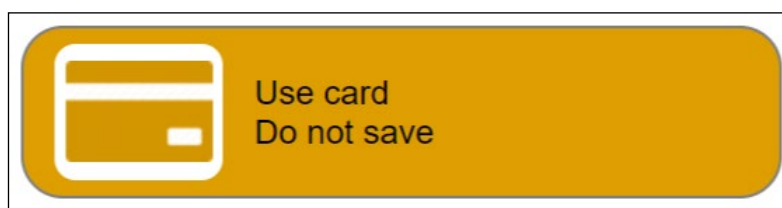
**NOTE:** Cards that have already expired and greyed out and labelled **Expired**.

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 not 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.

The screenshot displays the 'Additional Information' screen of the SIMS Pay system. At the top, it says 'SIMS Pay | Secure Online Payments'. Below this, the title 'Additional Information' is followed by a note: 'All fields marked \* are mandatory'. The form contains the following fields:

- Cardholder's Name\*: Mr Jonas Aaron
- Address 1: 1 Ely Road
- Address 2: Milton
- Address 3: Cambridge
- County: (empty)
- Country: (empty)
- Postcode: CB24 6DD
- Security Code\*: (empty)

At the bottom of the form, there are three buttons: 'Back', 'Reset', and 'Continue'. The 'Continue' button is highlighted in orange.

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
<b>TOTAL</b>		<b>£5.00</b>

**Card Details**

Please check that your card details are correct

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

Back Make Payment

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

My Basket  
Payment Method  
Payment  
**Confirmation**

Thank you - your payment is complete

You will shortly receive an email confirming your order.

**Payment Details**

Authorisation Code	108943
Transaction Number	274
Transaction Date	27 Jan 2020
Payment Reference	VISA *0000

**Chris Aaron - Green Abbey Secondary School (2)**

Product	Quantity	Price	Amount Paid
School Meal	1	£5.00	£5.00

Total Amount Paid for 1 item £5.00

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.

SIMS Pay | Secure Online Payments







All fields marked \* are mandatory

Amount £5.00

▶ Card Number\*


▶ Expiry Date\*
 / 


▶ Security Code\*


Back
Reset
Continue

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

**SIMS Pay** | Secure Online Payments

**Additional Information**

All fields marked \* are mandatory

▶ **Cardholder's Name\***  ⓘ

▶ **Address 1\***  ⓘ

▶ **Address 2**

▶ **Address 3**

▶ **County**

▶ **Country**

▶ **Postcode\***

- Complete the required details and 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
<b>TOTAL</b>		<b>£5.00</b>

**Card Details**

Please check that your card details are correct

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

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**

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

My Basket	Thank you - your payment is complete		
Payment Method	You will shortly receive an email confirming your order.		
Payment			
Confirmation			
<b>Payment Details</b>			
Authorisation Code	108937		
Transaction Number	273		
Transaction Date	27 Jan 2020		
Payment Reference	VISA *0000		
<b>Chris Aaron - Green Abbey Secondary School (2)</b>			
Product	Quantity	Price	Amount Paid
School Meal	1	£5.00	£5.00
Total Amount Paid for 1 item			£5.00
You can view your payment history in <a href="#">My Payments</a> .			
As requested your card has been saved for future use and can be managed in <a href="#">My Cards</a> .			

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.

My Homepage My Account My Basket £25.00 [3]

Ben

Last week Show

Current Balance: £0.00

School Meals > From 06 Nov 2018

Search criteria did not return any results

Green Abbey 11 | 11B

£0.00

Statements

- School Meals
- Transactions

Products

- Uniform
- Stationery

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.

My Homepage My Account Administration My Basket £20.00 [4]

Kelsi

Last year Show

Transactions > From 21 Nov 2018

Transaction Date	Transaction Number	Payment Type	Payer	Product Summary	Quantity	Amount
02 Nov 2018	64059	Manual Refund	N/A	good luck (red)	1	£2.50
01 Nov 2018	64058	Credit/Debit Card	Self	good luck (red)	1	£2.50
23 Oct 2018	64046	Cash	Self	test trip (instalment)	N/A	£20.00
23 Oct 2018	64045	Credit/Debit Card	Self	test trip (instalment)	N/A	£133.00
23 Oct 2018	64044	Discretionary	Self	test trip (instalment)	N/A	£122.00
23 Oct 2018	64043	Cash	Self	test trip (deposit)	N/A	£85.00
06 Oct 2018	64035	Credit/Debit Card	Self	variable	1	£5.50
25 Sep 2018	64031	Barcode	Other	fixed product	1	£1.00
23 Sep 2018	64022	Manual Refund	N/A	trip (deposit)	N/A	£58.53
22 Sep 2018	63997	Barcode	Other	trip (instalment)	N/A	£175.47

Agora 10.6.6.1 Year 12 | 12 a

Dorsey £0.00

Kiefer £0.00

Yesenia + £272.86

Eldridge

Statements

- School Meals
- Transactions

Products

- Uniform
- Stationery
- Trips

1 2 3

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.

The screenshot shows the SIMS Pay interface for a user named Jason. On the left, there's a profile section for Jason, showing a balance of +£26.60 and a list of products including School Meals, Uniform, Stationery, Trips, Events, and Transport. The main area is divided into three columns. The first column shows the 'School Meal Balance' widget with a balance of +£26.60 and an 'Add to Basket' button. The second column shows the 'Meal Purchase History' table with columns for Item, Date, and Cost (£). The third column shows the 'Fees Balance' widget with a balance of £1,600.00 and an 'Add to Basket' button. At the bottom right, there's a 'See More' button.

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

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## 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.
- No card details are stored in SIMS Pay.
- No 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 all 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 cannot 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.