

01 | Getting Started with SIMS Pay

Welcome to SIMS Pay	1
Your Invitation to Register Your SIMS Pay Account	1
Registering your Account	3

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.

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.

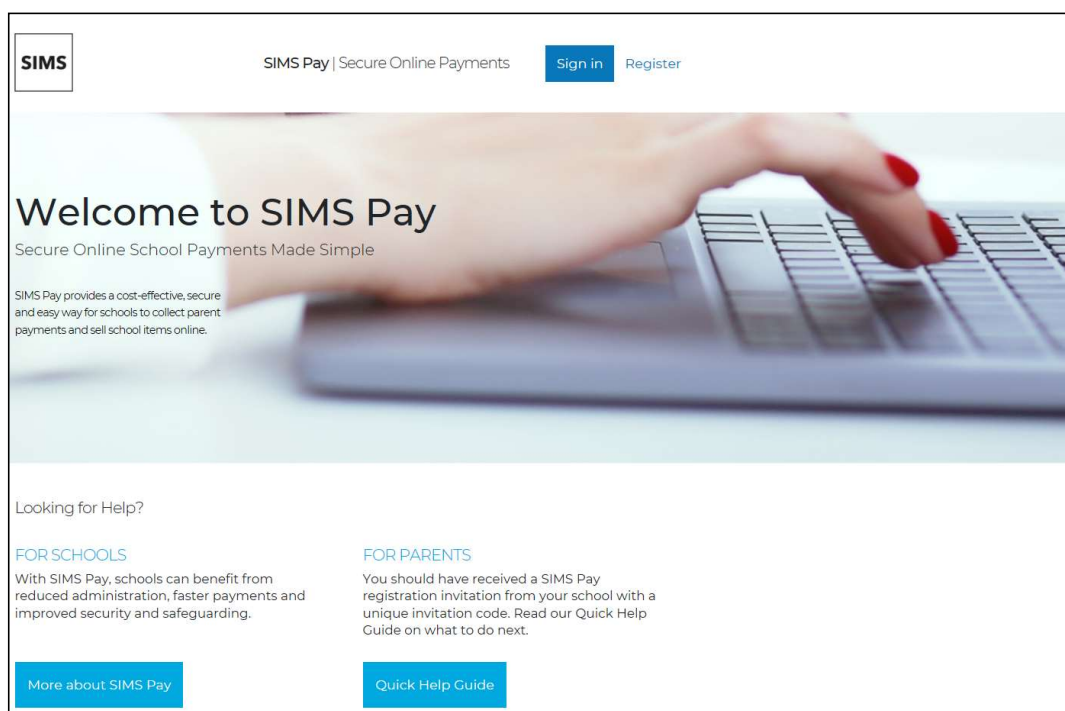
The range of payments you can make for your child(ren) is greater than the range of payments you can make on your own behalf (please see *Welcome to SIMS Pay* on page 1). The single invitation covers all your identities within SIMS Pay, i.e. school employee and parent/guardian.

Registering your Account

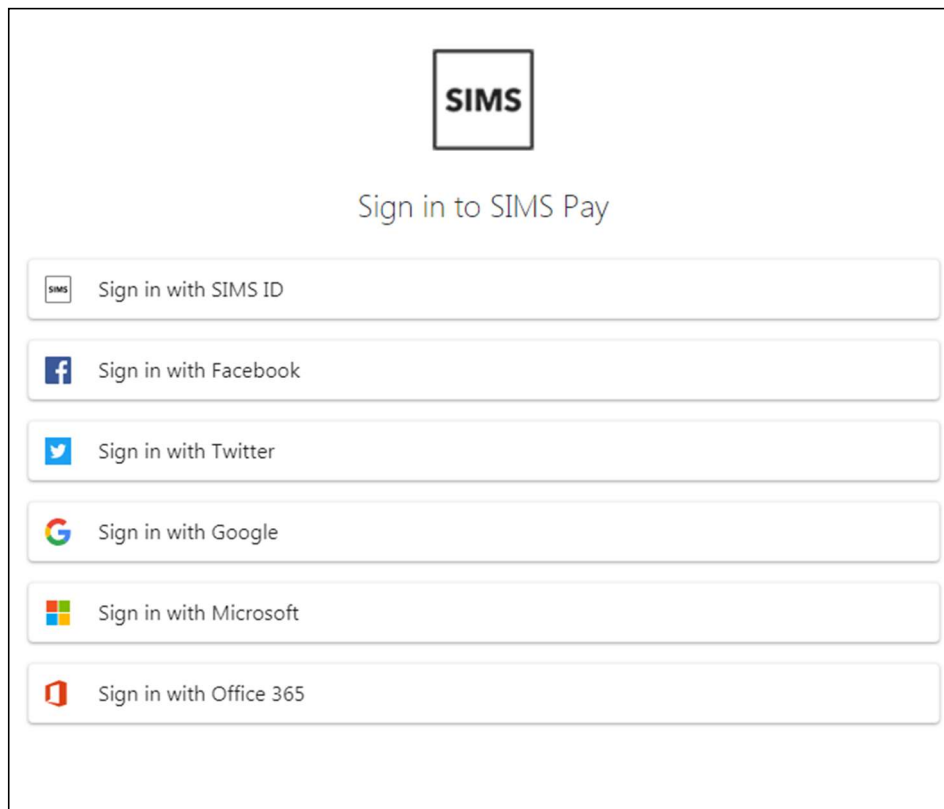
The registration process for the following customers is the same:

- 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).

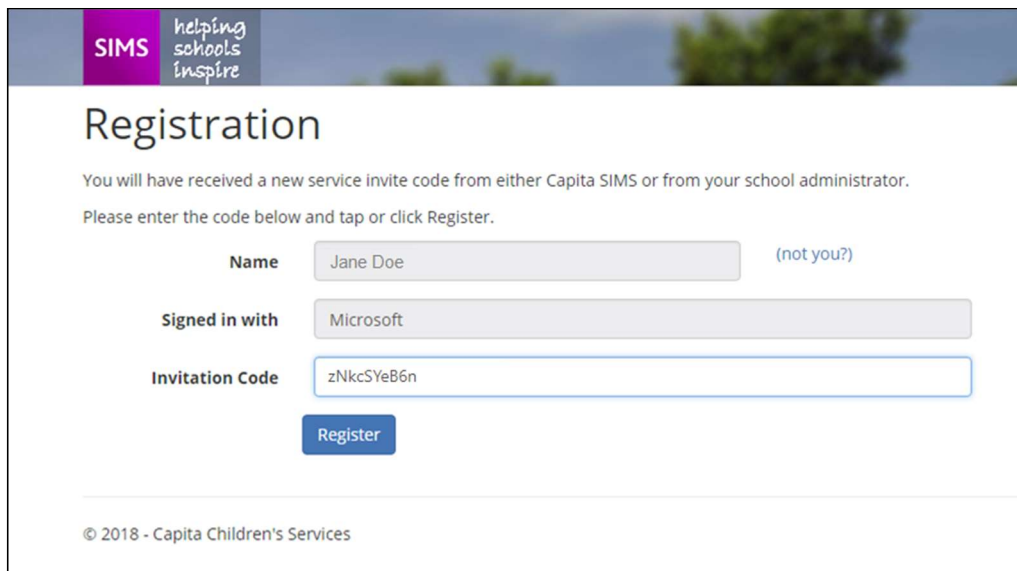
The **Registration - Welcome** page is displayed, showing your name (as recorded by the account) and the identity provider you selected. This is helpful if you share a computer with other users.

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).

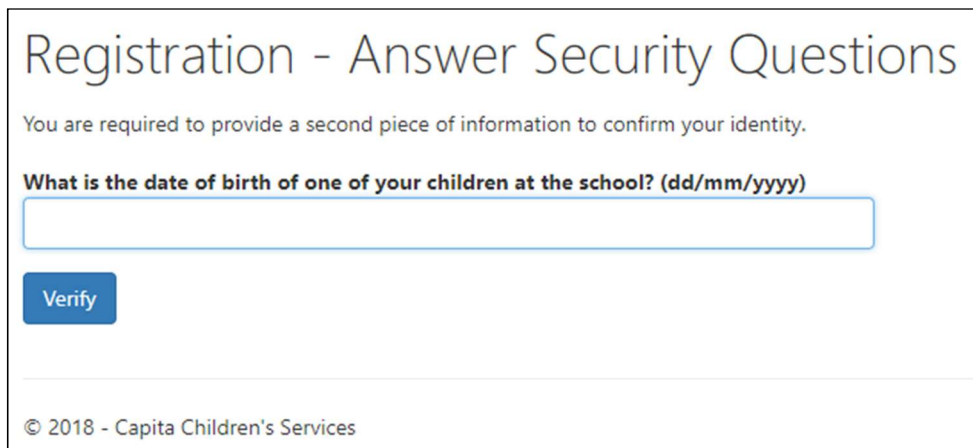
Registration

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.

The screenshot shows the SIMS Registration page. At the top, there is a header with the SIMS logo and the tagline "helping schools inspire". The main heading is "Registration". Below this, 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." There are three input 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 "Registration - Answer Security Questions" page. The heading is "Registration - Answer Security Questions". Below this, a message states: "You are required to provide a second piece of information to confirm your identity." The question is "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".

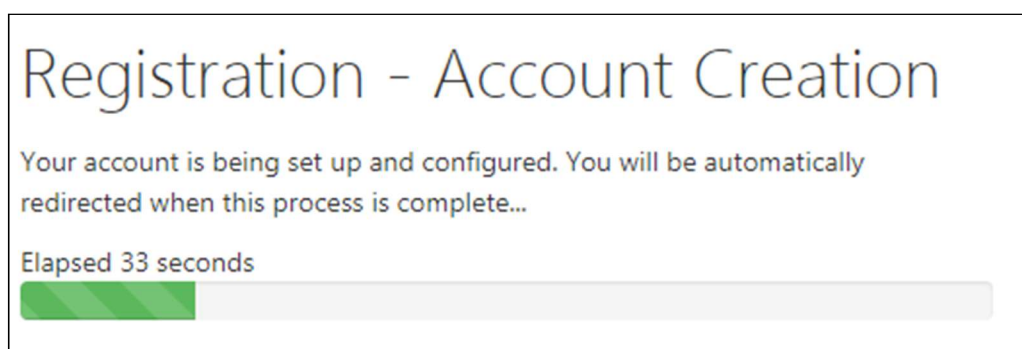
NOTE: The security question you are asked depends on whether you are registering as a parent/guardian or as an employee. The invitation from the school identifies the information you need to provide.

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.

01 | Getting Started with SIMS Pay

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 a web form titled 'Create Account' under the 'Registration' header. A note states 'mandatory fields marked with a *'. The form contains the following fields: Title (Mrs), Forename (Tessa), Surname (Canzano), Email Address (redacted@outlook.com), Confirm Email Address (redacted@outlook.com), Cardholder Name (Mrs Tessa Canzano), Billing Address (22 Lodge Avenue), Town (Bedford), County, Postcode (MK44 7DD), and Country. A checkbox for 'Allow automatic email notifications from SIMS Pay' is checked. At the bottom right are 'Cancel' and 'Continue' buttons.

- a. Record an **Email Address** and repeat this in the **Confirm Email Address** field.
- b. The **Enable 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 15).
- 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.

The screenshot shows a confirmation message box with the title 'Registration'. The text reads: 'Congratulations! Your account has been created.' followed by 'You are now able to make payments for this school within SIMS Pay.' A 'Continue' button is located at the bottom right.

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.

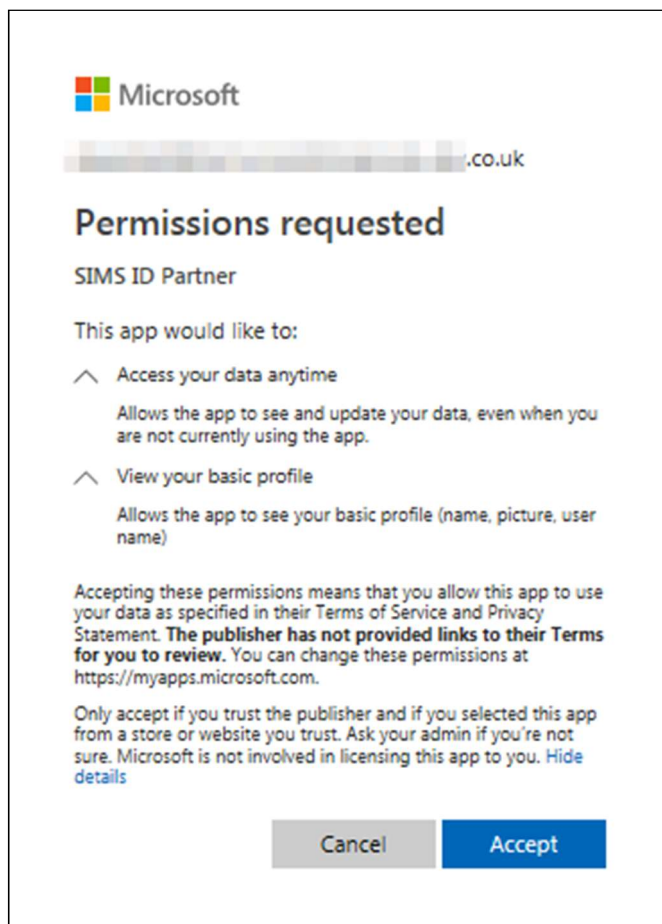
The screenshot shows the SIMS Pay user interface for a parent user named Charlotte. The interface is divided into several sections:

- Header:** Includes "My Account" and "My Basket £0.00 [0]" links.
- User Profile:** Displays a profile picture of a child, the name "Charlotte", and a balance of "+£18.00". Below this is a list of "Products" including School Meals, Uniform, Stationery, Trips, School Clubs, Events, Online Shop, Fees & Subs, and Exams & Lessons.
- School Meal Balance:** A section showing the current balance of "+£18.00" and an option to "Add funds between £5.00 and £100.00". It includes an "Enter Amount" input field and an "Add to Basket" button.
- Meal Purchase History:** A table with columns for "Item", "Date", and "Cost". It currently shows no data and a "See More" button at the bottom.
- Messages:** A section with two messages:
 - Posted on 11 Apr 2018: "Tickets for the School trip to Chessington Word of Adventure is now available to purchase. With limited availability book now to avoid disappointment."
 - Posted on 11 Apr 2018: "Don't forget to top up your child's school meal balance before the new term starts."
- Footer:** Includes the Capita logo, registered office address (71 Victoria Street, Westminster, London, SW1H 0XA), registered in England No. 2299747, and various security and payment logos (VISA, Mastercard, Verified by VISA, Microsoft Azure).

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.

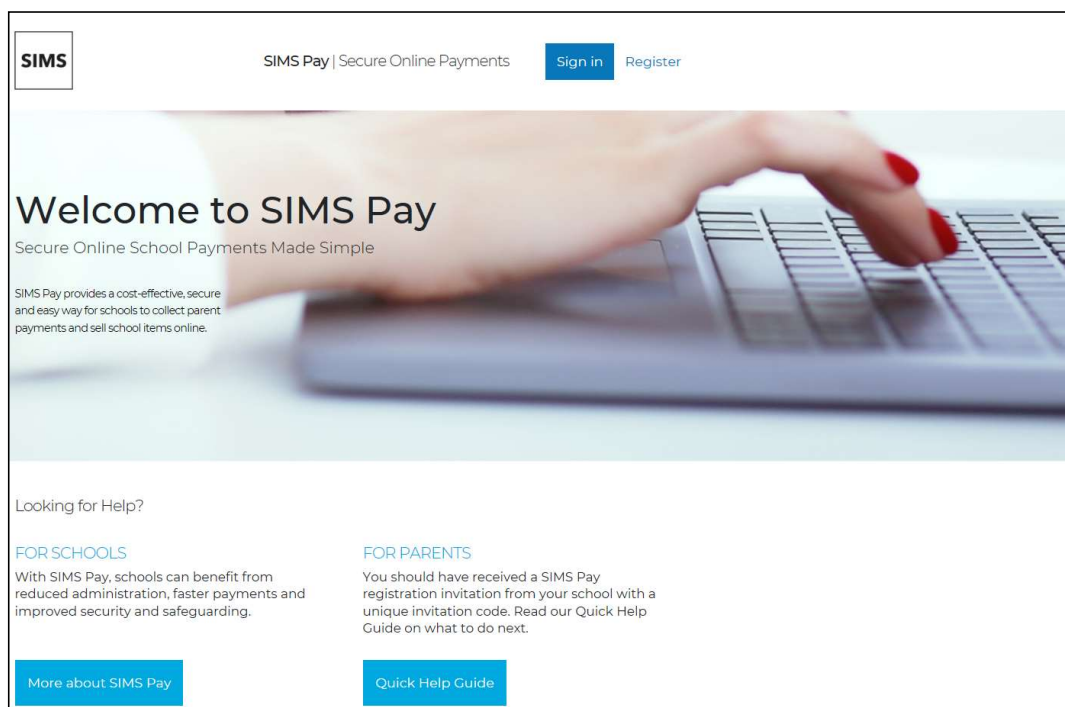
02 | Using SIMS Pay

Signing In	13
Managing My Account	14
Increasing a School Meal Balance	21
Purchasing Products and Services	24
My Basket	25
Checking Out.....	26
Paying with PayPoint or at the Post Office.....	29
Viewing School Meal Statements	29
Viewing Transaction Statements.....	30

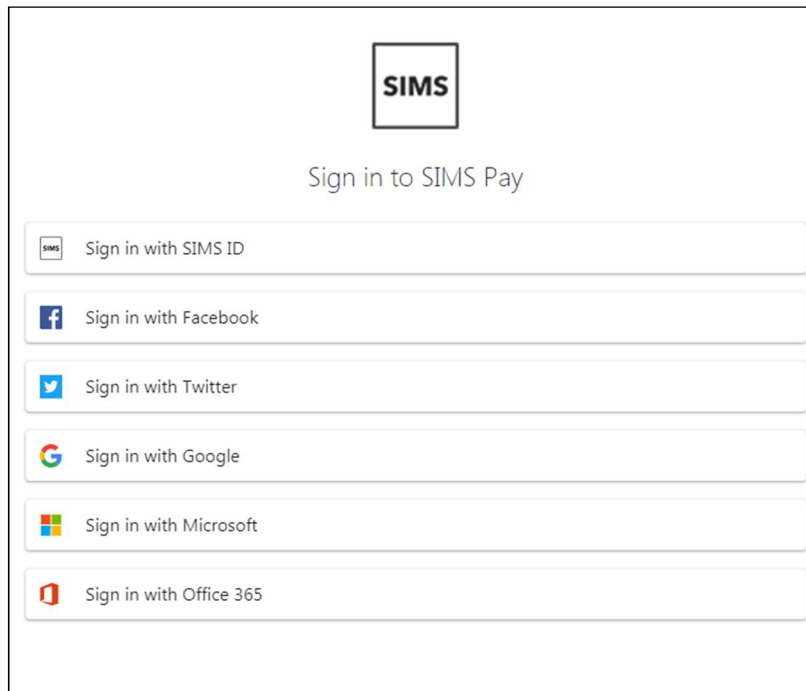
Signing In

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.

The image shows the SIMS Pay sign-in page. At the top center is the SIMS logo, which consists of the word "SIMS" in a bold, sans-serif font inside a square border. Below the logo is the text "Sign in to SIMS Pay". Underneath this are six horizontal buttons for different sign-in methods. Each button has a small icon on the left and text on the right. The buttons are: "Sign in with SIMS ID" (SIMS icon), "Sign in with Facebook" (Facebook 'f' icon), "Sign in with Twitter" (Twitter bird icon), "Sign in with Google" (Google 'G' icon), "Sign in with Microsoft" (Microsoft four-color square icon), and "Sign in with Office 365" (Office 365 'O' icon).

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.

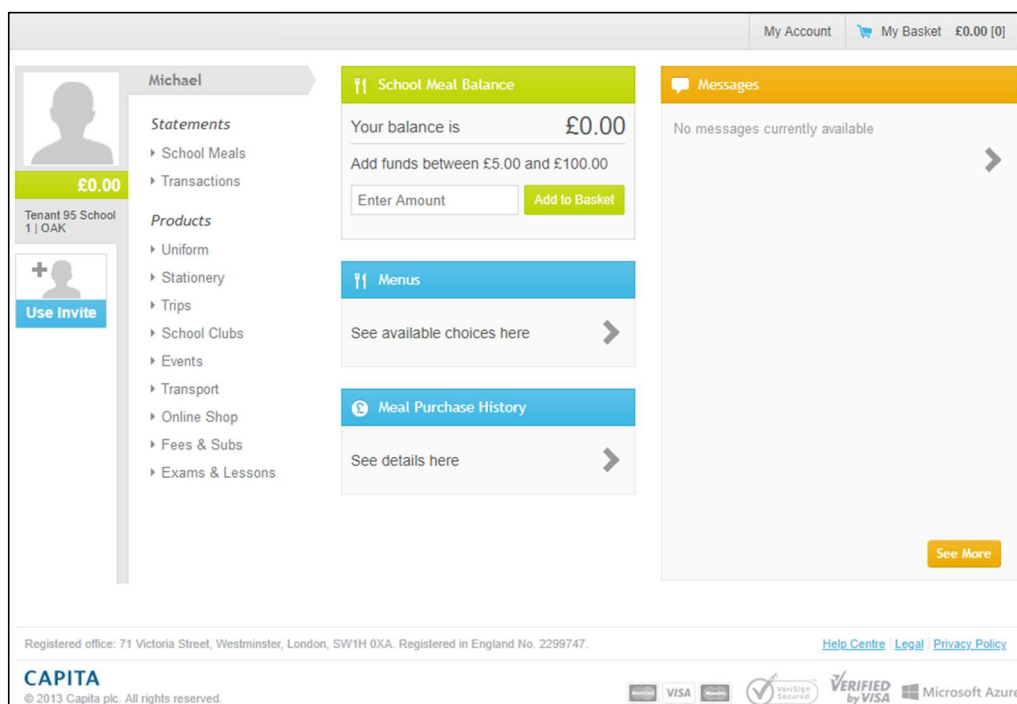
***TIP:** For problems with signing in, please review the Troubleshooting section of this handbook.*

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.



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' (selected), 'My Links', 'My Schools', and 'My Payments'. The main content area is titled 'My Details' and includes 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:

At the bottom, there is a checked checkbox labeled 'Allow automatic email notifications from SIMS Pay'. 'Cancel' and 'Save Changes' buttons are located in the bottom right corner.

2. Ensure that these details are correct.

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

The **Enable 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:

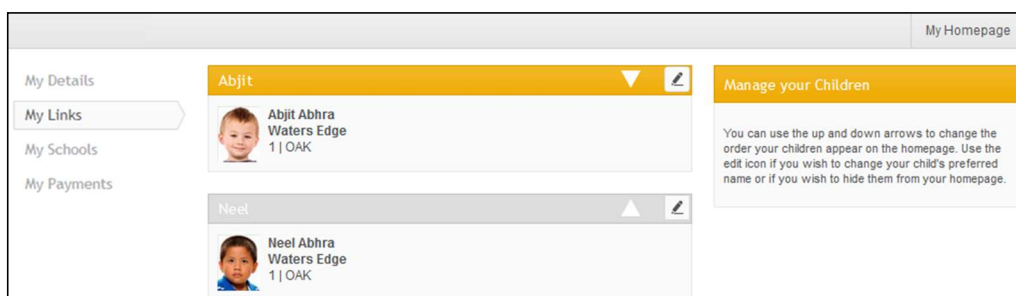
- Product notifications
- School Meal Balance notifications. A message will be sent to you when your balance reaches a pre-determined threshold, to give you a chance to 'top up' before the balance runs out
- Next instalment due soon notifications (applies to instalment payments only)
- Overdue instalment 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 20).

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 20). 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 20). 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 15).

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 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 30).

***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**.

- 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.

The screenshot shows the 'My Payments' section of the SIMS Pay interface. On the left, there is a sidebar with 'My Details', 'My Links', and 'My Payments' (which is highlighted). The main content area has a yellow header 'Payments in Progress' followed by the text 'No payments in progress'. Below this is a dropdown menu set to 'Last year' and a 'Show' button. Underneath is another yellow header 'Payment History > From 13 Apr 2017'. A table displays two transactions:

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.

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

The screenshot shows the 'Payment Details' page for transaction 255082970. It includes a 'Back' button in the top right. The page has a yellow header 'Payment Details' and a table with the following details:

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

Below this is a yellow header 'Charlotte Ackton - Waters Edge School (2)'. A table lists the items purchased:

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.

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.

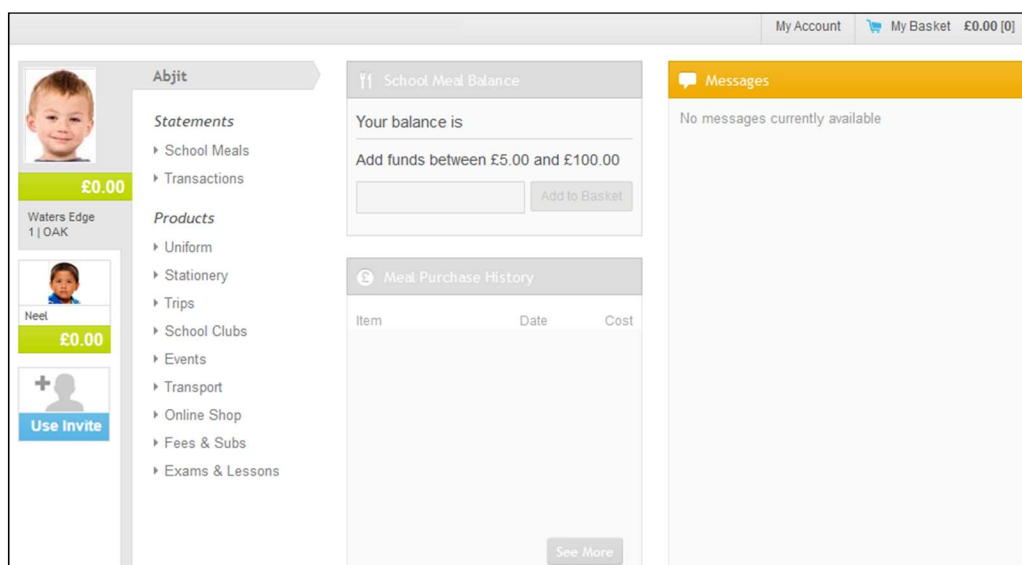
Increasing a School Meal Balance

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).*

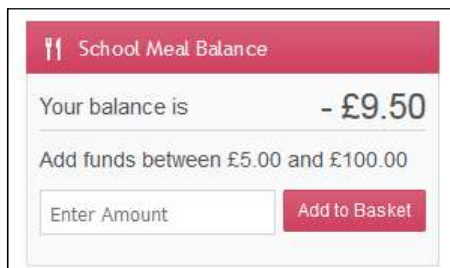
1. From **My Homepage**, click a child's name or their picture (if there is one) on the left-hand side of the page to display the selected child at the top of the group.

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.



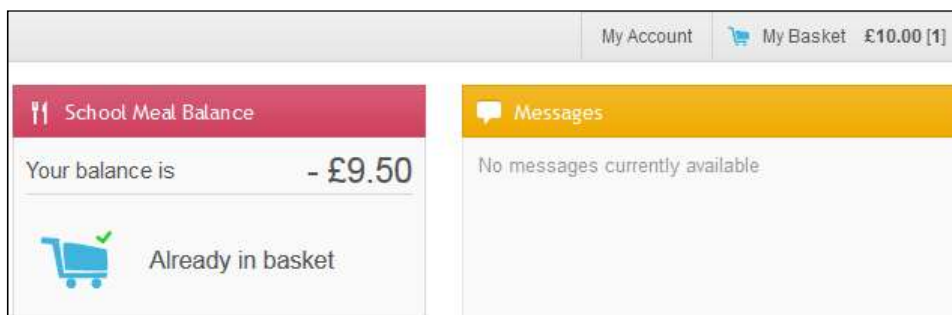
School Meal Balance

Your balance is **- £9.50**

Add funds between £5.00 and £100.00

Enter Amount **Add to Basket**


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.



My Account **My Basket £10.00 [1]**

School Meal Balance

Your balance is **- £9.50**

 **Already in basket**

Messages

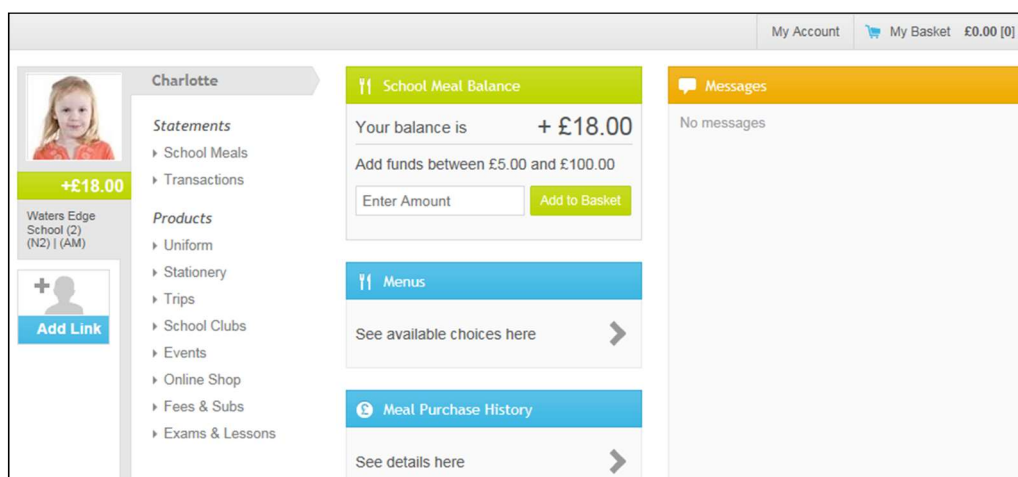
No messages currently available

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.



My Account My Basket £0.00 [0]

Charlotte

Statements

- School Meals
- Transactions

Products

- Uniform
- Stationery
- Trips
- School Clubs
- Events
- Online Shop
- Fees & Subs
- Exams & Lessons

School Meal Balance

Your balance is **+ £18.00**

Add funds between £5.00 and £100.00

Enter Amount **Add to Basket**

Menus

See available choices here

Meal Purchase History

See details here

Messages

No messages

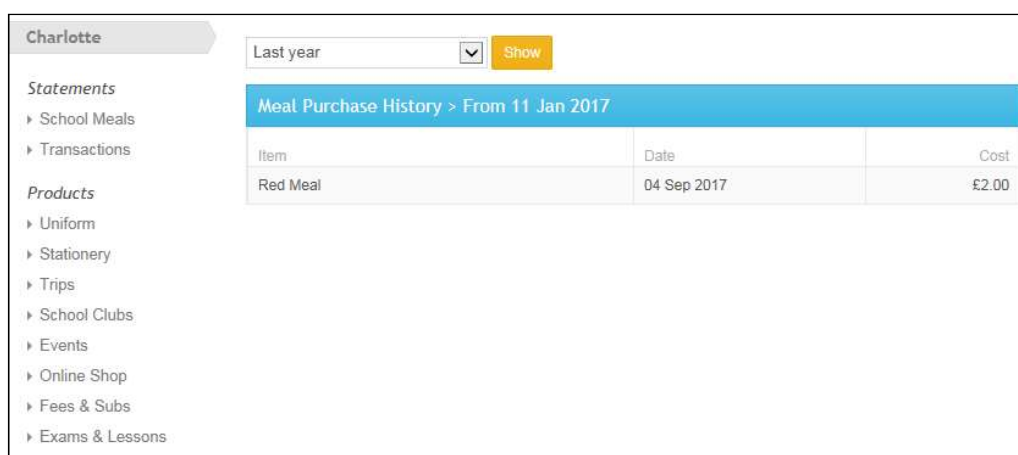
Waters Edge School (2) (N2) (AM)

+£18.00

Add Link

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

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



Charlotte

Last year **Show**

Meal Purchase History > From 11 Jan 2017

Item	Date	Cost
Red Meal	04 Sep 2017	£2.00

Statements

- School Meals
- Transactions

Products

- Uniform
- Stationery
- Trips
- School Clubs
- Events
- Online Shop
- Fees & Subs
- Exams & Lessons

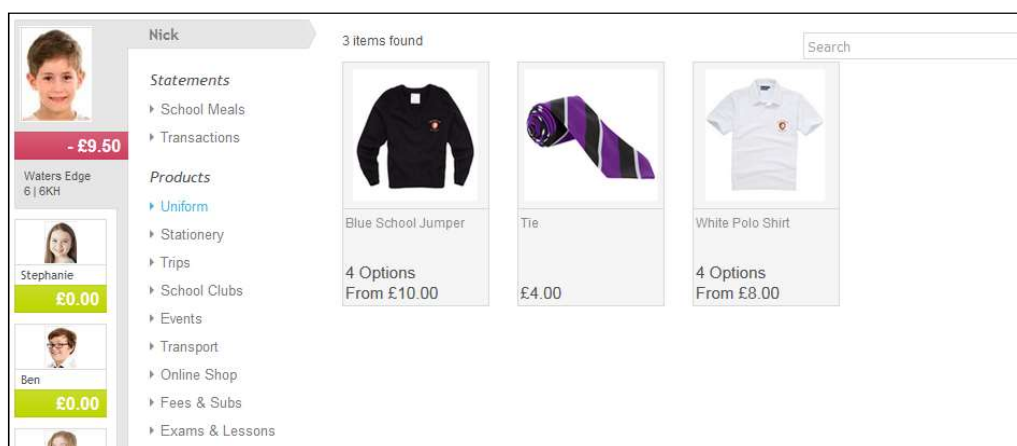
3. Use the drop-down list to display purchases for **Last week**, **Last 2 weeks**, **Last 4 weeks** or **Last year**, then click the **Show** button. Meals purchased within the period specified are displayed.

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	
Remove from basket	1 Update	£10.00	£10.00	
Remove from basket	1 Update	10.00	£10.00	
Remove from basket	2 Update	£5.50	£11.00	
Tina at Blue				
Product	Quantity	Price	Cost	
Remove from basket	1 Update	6.00	£6.00	
Steve at Green				
Product	Quantity	Price	Cost	
Remove from basket	1 Update	9.00	£9.00	
			Total Cost for 6 items £46.00	
			Checkout	

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 24).
3. Click the **Checkout** button to proceed to the checkout (please see *Checking Out* on page 26).

Checking Out

The checkout process requires the input of your personal and card details to complete the purchase of any items added to your basket.

1. From **My Basket**, click the **Checkout** button to display the **Secure Cashless Payments** screen.

Secure Cashless Payments

VISA MasterCard Maestro VISA DEBIT VISA ELECTRON

All fields marked * are mandatory
Amount £26.00

▶ Card Number*

▶ Expiry Date* /

▶ Security Code*

Back Reset Continue

Note: Clicking on the links below will open a new browser window.

MasterCard SecureCode [Learn more](#)

Verified by VISA [learn more](#)

Trustwave Trusted Commerce [Click to Validate](#)

2. Enter the required details.

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

Additional Information
All fields marked * are mandatory

▶ Cardholder's Name*

andrew bedford

▶ Address 1*

23, the ford

▶ Address 2

▶ Address 3

▶ County

bedford

▶ Country

uk

▶ Postcode*

mk42

Back

Reset

Continue

*NOTE: If you have recorded cardholder details on the **My Details** page, they will be displayed automatically. If cardholder details are not recorded, you must enter this information each time you carry out this process.*

- 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
Football club donation	1	£20.00
School Meal	1	£6.00
TOTAL		£26.00

Card Details

Please check that your card details are correct

Card Number	*****037
Cardholder	andrew
Expiry Date	12/18

Back Make Payment

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

My Basket

Payment

Confirmation

Thank you - your payment is complete

You will shortly receive an email confirming your order.

Payment Details

Authorisation Code	173517
Transaction Number	64444
Transaction Date	05 Feb 2016
Payment Reference	VISA *037

Kelsi Amrich - Agora 10.6.6.1

Product	Quantity	Price	Amount Paid
Football club donation	1	£20.00	£20.00
School Meal	1	£6.00	£6.00
Total Amount Paid for 2 items			£26.00

Just so you know... You can always check your [Payments](#) online.

- A summary of your payment is displayed.

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 30).

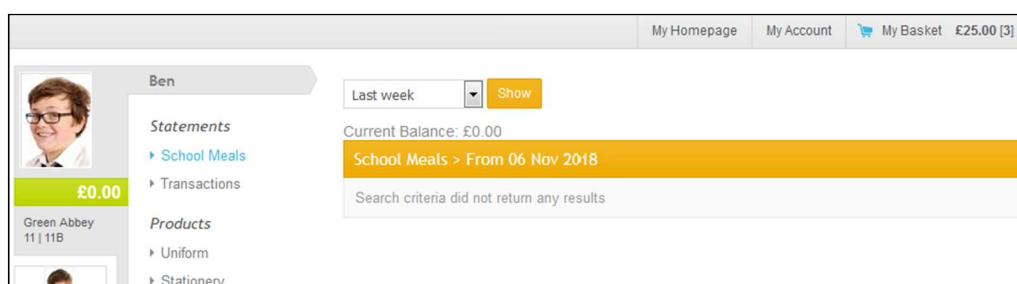
IMPORTANT NOTE: Payments made by barcode cannot be assigned to an account holder and will therefore only be displayed in the **School Meal Statement** or **Transaction Statement** screens. The **Payer** will be displayed as **Other**.

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 screenshot shows the SIMS Pay interface. At the top, there are navigation tabs: My Homepage, My Account, Administration, and My Basket (containing 4 items for £20.00). On the left, a sidebar lists children: Kelsi (selected), Dorsey, Kiefer, Yesenia, and Eldridge, each with a balance. Kelsi's balance is +£26.50. Under Kelsi's name, there are links for Statements (School Meals, Transactions), and Products (Uniform, Stationery, Trips). The main area shows a dropdown for 'Last year' and a 'Show' button. Below this, a table titled 'Transactions > From 21 Nov 2018' displays a list of transactions with columns for Transaction Date, Transaction Number, Payment Type, Payer, Product Summary, Quantity, and Amount.

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

At the bottom right of the table, there are pagination controls: 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.

03 | Additional Information

SIMS Pay Security	33
Technical Requirements	34
FAQ	34

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>).

03| Additional Information

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.