

Family Record, Auto-Pay Tab

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The Auto-Pay tab in the system will display if a parent is registered to have payments deducted from their payment method automatically. The settings around this ability can be found [here](#).

Please Note: The auto-pay schedule will be determined by the effective date and the billing schedule. For example: If Family A added their auto-pay method on 1/8/24 and the schedule set up by the center is bi-weekly on Friday, auto-pay will run 1/12/24 and then again on 1/26/24. If Family B added their payment method on 1/15/24 with the same auto-pay schedule, their auto-pay will run 1/19/24 and then again on 2/2/24.

Summary Family Children Parents Third Party Volunteers Communication **Auto-Pay** Vacation Financials Receipts Merge

Payment Method List

Account Type	Account Number	Exp Date	Account Holder	Contact	Billing Schedule
No payment methods set up					

Add New Auto Payment Method

Parent
Stewart, Guardian 1

Account Holder Information

First Name *
Last Name *
Address *
City *
State/Province *
Zip Code *
Email Address *
Phone Number *

Payment Information

Payment Type
Credit Card
Card Type *
MasterCard
Card Number *
Expiration Month *
01-January
Expiration Year *
17

Recurrence Schedule

Recurring *
Full Amount
Start Using *
12/27/2017

Save

If a payment method already exists, it will display under the payment method list. From this screen, staff can edit or delete an auto-pay method for a parent.

With proper permissions parents are able to self service their auto-pay information from the portal-

[click here for an overview.](#)

To see all parents who have registered an auto-pay account you can pull the auto-pay holder report.

If payments are set to process automatically, nothing further is required from staff/admin users.. If batches are being created manually, to create an auto-pay batch go to the [Payments > AutoPay Batch Screen](#).
