



MySchoolBucks

End of Year/Start of Year Process

Last Updated: January 2019

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Special Dates

Special Dates is the section used for easily setting up the MySchoolBucks website for periods of inactivity, such as Winter Break or the end of the school year. This way, payments will stop and start up again automatically based on a pre-selected date range.

Entering the Start of Year

To help assist district admin users during the start of the school year, MSB may automatically ask for the date of the first day of school at the district.

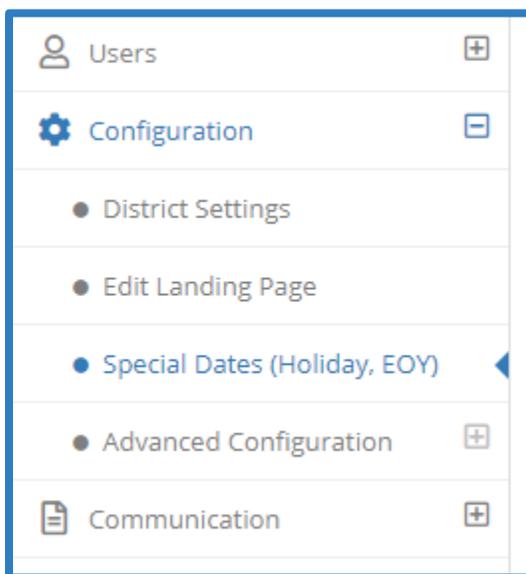
We want to be here for you!

The start of school is your busiest time of year. The MSB team understands that your time is valuable and you have a lot to do during this time of year. To be as effective as we can it would help to know one easy piece of information - when is your first day of school?

Start of Year

SKIP FOR NOW UPDATE

If you need to edit the Start of Year date, on the Admin Tools sidebar, expand **Configuration** and click **Special Dates (Holiday, EOY)**.



Then, click the **Edit button** next to the Start of Year entry.

Special Dates Manage Start of Year (SOY), End of Year (EOY), Holiday, and POS Support dates.

Search [] [Refresh] 50 [Grid]

Description	Type	Start Date	End Date	Phone	Email	Message / Notes	Last Updated	
It's a new year	Start of Year	06/04/2018	06/04/2018		braddley.rhymes@e-hps.com	New Year	2018-05-29 09:49:30	
End of year	End of Year	06/02/2018	06/03/2018	8885552222	braddley.rhymes@e-hps.com	We hope you had a great school year! We will not be accepting meal payments until the next school year begins. Have a great summer - see you soonitest	2018-06-04 03:17:44	

Adding an EOY Special Date

1. On the Admin Tools sidebar, expand **Configuration**.
2. Click **Special Dates (Holiday, EOY)**.
3. Click **Add**.

Special Dates Manage Start of Year (SOY), End of Year (EOY), Holiday, and POS Support dates.

Search [] [Refresh] 50 [Grid]

Description	Type	Start Date	End Date	Phone	E...	Message / Notes	Last Updated
Showing 1 to 1 of 1 Items							

4. Under Date Type, select **End of Year**.

Add Special Date Manage Start of Year (SOY), End of Year (EOY), Holiday, and POS Support dates.

Date Type

End of Year [x] [v]

An **End of Year (EOY)** date type represents an **inactive period** for the district. Meal payments are **disabled** for your district's parents during the date range selected below.

The **Start Date** and **End Date** fields represent the **first** and **last** day of the inactive period.

5. Under **Description**, enter a short description for the inactive period such as “Year End 2019” or “2019 Summer Break”.
6. Under **Start Date**, enter the first day that payments through MySchoolBucks will be turned off. This likely comes after the last day of school.
7. Under **End Date**, enter the first day that payments through MySchoolBucks will be turned back on. This should coincide with the earliest date your district is able to accept online payments for the next school year.
8. Under **Contact Phone**, enter the phone number for the food service representative. This step is optional.
9. Under **Contact Email**, enter the email address of the food service representative. The email listed here will receive automated emails and reminders related to this special date setup. This step is optional.
10. Under **Banner Message**, enter the message you would like to appear for users logging in to MySchoolBucks during this inactive period.
NOTE: There is a maximum of 800 characters.
11. When you have finished entering the necessary information, click **Submit**.

The screenshot shows a web form for configuring an inactive period. The form is titled "Description" and contains several input fields, each with a question mark icon for help. The fields are: "Description" (text input with "Summer 2019"), "Start Date" (calendar icon, "6/7/2019"), "End Date" (calendar icon, "8/19/2019"), "Contact Phone" (phone icon, "(888) 555-5555"), and "Contact Email" (envelope icon, "foodrep@example.com"). Below these is a "Banner Message" section with a text area containing "We hope you had a great school year! We will not be accepting meal payments until the next school year begins." and "Have a great summer - see you soon!". A character count "651 characters remaining" is shown at the bottom left of the text area. At the bottom right are "Cancel" and "Submit" buttons.

12. The newly added special date will appear on the Special Dates page.

IMPORTANT: You may only have *one* Special Date with the Date Type “End of Year”. If you try to add a new Special Date when an End of Year date is already created, the “End of Year” option will not be available. You must either edit the existing End of Year date or delete the old date and enter a new one.

Special Dates

Manage Start of Year (SOY), End of Year (EOY), Holiday, and POS Support dates.

↻ 50 ▾
☰ ▾

Description	Type	Start Date	End Date	Phone	E...	Message / Notes	Last Updated
Summer 2019	End of Year	06/07/2019	08/19/2019	(888) 555-5555	foodr...	<p style="font-size: small; margin: 0;">We hope you had a great school year! We will not be accepting meal payments until the next school year begins.</p> <p style="font-size: small; margin: 0;">Have a great summer - see you soon!</p>	2019-01-15 11:51:53

Showing 1 to 1 of 1 Items

Export
+ Add

Editing a Special Date

To edit an entry on the Special Dates page, click the **blue icon** next to the special date you wish to edit.

Special Dates

Manage Start of Year (SOY), End of Year (EOY), Holiday, and POS Support dates.

↻ 50 ▾
☰ ▾

Description	Type	Start Date	End Date	Phone	Email	Message / Notes	Last Updated
It's a new year	Start of Year	06/04/2018	06/04/2018		braddley.rhymes@e-hps.com	New Year	2018-05-29 09:49:30
End of year	End of Year	06/02/2018	06/03/2018	8885552222	braddley.rhymes@e-hps.com	<p style="font-size: small; margin: 0;">We hope you had a great school year! We will not be accepting meal payments until the next school year begins.</p> <p style="font-size: small; margin: 0;">Have a great summer - see you soonitest</p>	2018-06-04 03:17:44

From here, editing an existing special date is virtually identical to the process of adding a new one with the exception of the Date Type, which cannot be changed after first adding the special date. Note that the email address listed under **Contact Email** will receive automated messages and reminders related to this special date setup Click **Submit** to save any edits made, or click **Cancel** to return to the Special Dates page and discard any changes.

Edit Special Date

Manage Start of Year (SOY), End of Year (EOY), Holiday, and POS Support dates.

Date Type: End of Year

An **End of Year (EOY)** date type represents an **inactive period** for the district. Meal payments are **disabled** for your district's parents during the date range selected below.

The **Start Date** and **End Date** fields represent the **first** and **last** day of the inactive period.

Description

Summer 2019

Start Date 06/07/2019 End Date 08/19/2019

Contact Phone (888) 555-5555

Contact Email foodrep@example.com

Banner Message (temporarily displayed with District Announcement during the inactive period)

We hope you had a great school year! We will not be accepting meal payments until the next school year begins.

Have a great summer - see you soon!

Deleting a Special Date

To delete an entry on the Special Dates page, click the **red icon** next to the entry you wish to delete.

Special Dates Manage Start of Year (SOY), End of Year (EOY), Holiday, and POS Support dates.

Description	Type	Start Date	End Date	Phone	Email	Message / Notes	Last Updated	
It's a new year	Start of Year	06/04/2018	06/04/2018		braddley.rhymes@e-hps.com	New Year	2018-05-29 09:49:30	 
End of year	End of Year	06/02/2018	06/03/2018	8885552222	braddley.rhymes@e-hps.com	We hope you had a great school year! We will not be accepting meal payments until the next school year begins. Have a great summer - see you soon!test	2018-06-04 03:17:44	 

Information for the special date will appear. Click **Yes, Delete** to confirm deleting the entry.

This can be useful for removing older date periods that have already passed.

Confirm Delete Are you sure you want to delete this Special Date?

Description: It's a new year

Type: Start of Year

Start Date: 06/04/2018

End Date: 06/04/2018

No, Cancel Yes, Delete

Refund Student Balances

Provide refunds for students in accordance with your district's refund policy, especially for graduating seniors and students leaving the district. Please do not refer parents to contact the MySchoolBucks support team for refunds. MySchoolBucks does not retain any funds on behalf of the district.

Support

For additional support, please contact Technical Support between the hours of 8 AM EST and 5 PM EST at 1-800-803-6755.

You may also contact customer technical support by using our [support request form](#).

Heartland

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