

# Enrolling in AutoPay

Updated Jul 20, 2021

As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

## Overview

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This article details how payers can enroll in, unenroll in, and modify AutoPay.

## Enrolling in AutoPay

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Payers enroll in AutoPay in one of two ways:

1. During Online Enrollment
2. Via their Parent Portal



## VCPay Registration

School  
2019 - 2020

 **Setup Saved Payment Accounts**

Setup Accounts

Setup Billing AutoPay

### Important Note:

School defined instruction text

SCHOOL YEAR

**2019-2020**

### Students



TYPE

TUITION

PAYMENT ACCOUNT

No account selected

Select Account

TYPE

INCIDENTALS

PAYMENT ACCOUNT

No account selected

Select Account

Save and Continue

Click **Select Account** for each invoice to associate a payment method with the invoice. Click **Set up Accounts** to add additional accounts. Click **Save and Continue** when done.

In order for enrollment to be possible, several conditions need to be met:

- Billing person must be configured on the invoice
- Students for that parent must be registered for VCPay
- VCPay terms and conditions must be accepted.

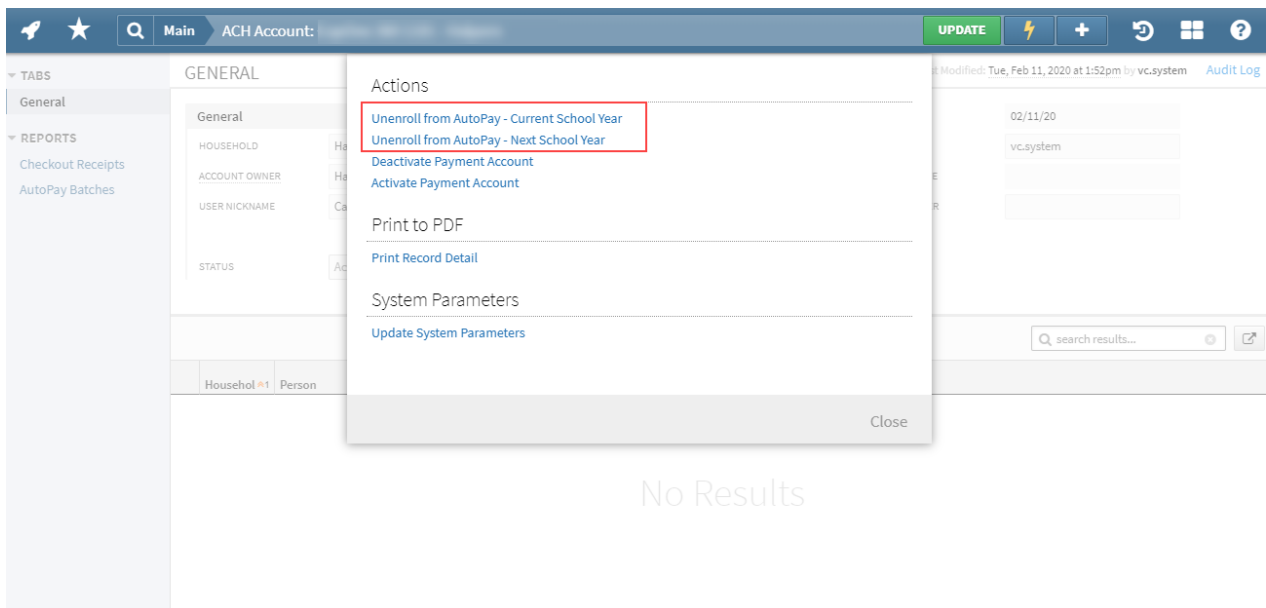
Please note, the text box verbiage can be updated from the AutoPay Homepage -> AutoPay Preference Forms.

## Unenrolling in AutoPay

Payers cannot unenroll themselves in AutoPay, the Payers must contact the school. The ability unenroll from AutoPay exists in two locations, the saved **Payment Account** and the **Invoice**.

### Payment Account:

This option can be utilized prior to the creation of the invoice.

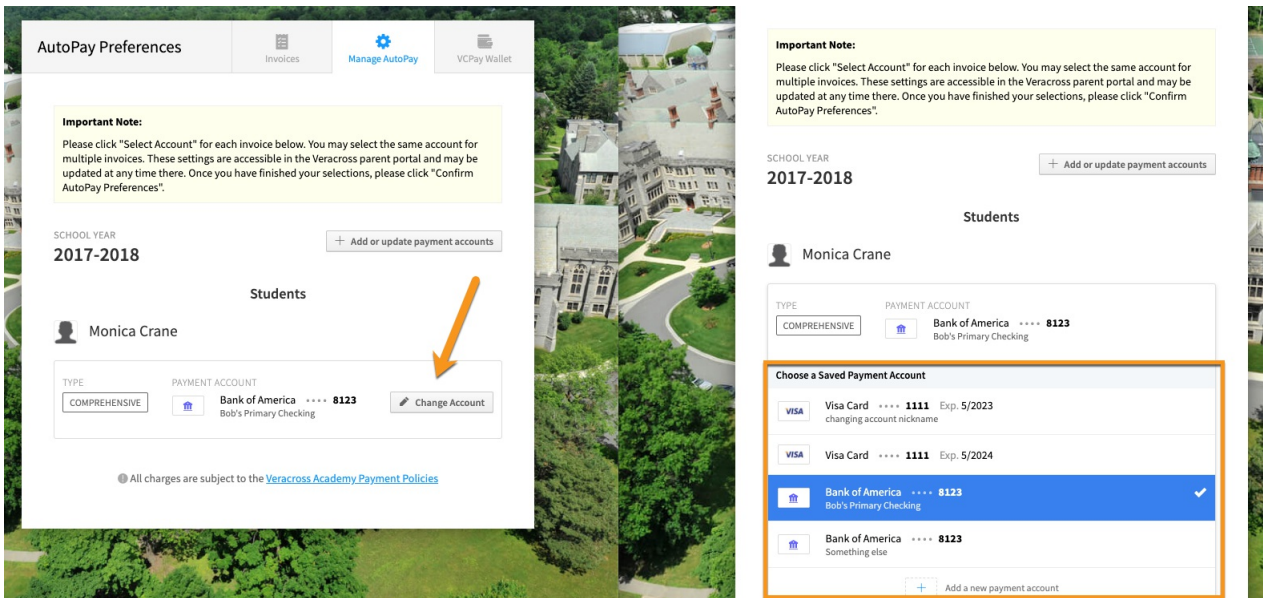


### Invoice Record:

If the Invoice has been created, then the ability to unenroll is directly on that Invoice Record.

# Modifying AutoPay Enrollment

Payers can modify which payment account is associated with AutoPay via their parent portal.



The school can exclude a single instance of AutoPay from one AutoPay Batch via the status on the AutoPay Batch detail screen.

PROCESSING QUEUE Last Modified: Mon, May 18, 2020 at 7:03pm by julie.roach@veracross.c

**General**

BATCH TYPE: Invoice Payments

SCHEDULED BATCH DATE: 06/03/19

Monday

**Scheduled Reminder**

DATE: 05/29/19

Wednesday

STATUS: Sent

**Payment Processing**

CC GATEWAY: BlueSnap - PPF (SANDBOX)

ACH GATEWAY: BlueSnap - SPF (SANDBOX)

**Batch Totals**

TOTAL AUTOPAY AMOUNT: 3,750.00

TOTAL RECORDS: 3

EXCLUDED RECORDS: 0

REFRESH DATE: 05/12/20 03:15 pm

**Invoice Criteria**

SCHOOL YEAR: 19-20

INVOICE TYPE: Comprehensive

PAYMENT PLAN: Ten Payment Installments

INSTALLMENT NUMBER: 2

BEGIN DUE DATE: 06/01/2019

END DUE DATE: 06/30/2019

**Processing Status**

PROCESSING STATUS: Not Processed

PROCESSING DATE:

PROCESSING PERSON: None

**Approval Status (Required)**

APPROVED?: No

APPROVAL DATE:

APPROVAL PERSON: None

**Review Status (Optional)**

REVIEWED?: Yes

REVIEW DATE: 05/18/20 03:03 pm

REVIEW PERSON: None

**Validation**

FIRST TIME PMT ACCOUNTS: 0

NR PAYMENT ACCOUNTS: 0

AUTOPAY > TOTAL UNPAID: 0

NUMBER OF OVERRIDES: 2

OVERRIDE > EXPECTED: 1

OVERRIDE < EXPECTED: 1

PENDING PAYMENTS?: 7

**All Invoices** Modified Type - CC Type - ACH Overrides Excluded Pending Payments

Status	Modified?	Invoice Numbr #2	Students	Total Unpaid Amount	Scheduled Amount	Overdue Amount	Pending Payments	Expected Amount	Override Amount	AutoPay Amount	Payment Account Type	Account Owner	Account Description	Scheduled Reminder Status	Resend Reminder Email
Include	<input type="checkbox"/>	1947	Bill Cody	16,100.00	2,150.00	1,550.00	220.00	3,480.00	500.00	500.00	CC	Cody, John	Visa 9299	Sent	<input type="checkbox"/>
Include	<input type="checkbox"/>	1949	Chase Jones	15,500.00	1,550.00	1,550.00	6,200.00	0.00	150.00	150.00	ACH	Lam, Aaron	Bank of Vernon 9992	Sent	<input type="checkbox"/>
Exclude	<input type="checkbox"/>	1950	Andrew Jones	15,500.00	1,550.00	1,550.00	6,200.00	0.00	0.00	0.00	ACH	Lam, Aaron	Bank of Vernon 9992	Not Sent	<input type="checkbox"/>
Exclude	<input type="checkbox"/>	1951	Emma Jones	15,500.00	1,550.00	1,550.00	8,000.00	0.00	0.00	0.00	ACH	Lam, Aaron	Bank of Vernon 9992	Not Sent	<input type="checkbox"/>
Include	<input type="checkbox"/>	1952	Mitchell Jones	17,000.00	1,700.00	1,700.00	6,800.00	0.00	0.00	0.00	ACH	Lam, Aaron	Bank of Vernon 9992	Not Sent	<input type="checkbox"/>
Include	<input type="checkbox"/>	1948	Hannah Price, Benjamin ...	32,500.00	3,250.00	3,250.00	9,750.00	0.00	0.00	0.00	CC	Price, Barry	Visa 9299	Sent	<input type="checkbox"/>
Include	<input type="checkbox"/>	1957	Calvin Simpson	15,500.00	1,550.00	1,550.00	6,200.00	0.00	0.00	0.00	ACH	Simpson, Matthew	Bank of Vernon 9992	Not Sent	<input type="checkbox"/>
Include	<input type="checkbox"/>	1958	Charlotte Simpson	15,500.00	1,550.00	1,550.00	0.00	3,100.00	0.00	3,100.00	ACH	Simpson, Matthew	Bank of Vernon 9992	Sent	<input type="checkbox"/>

## Verifying a parent has enrolled in AutoPay

To view or confirm if a family is successfully enrolled in AutoPay navigate to the Household Record on the Accounting side and look on the "AutoPay Preferences" Tab. If there is a record found, then the family is successfully enrolled in AutoPay.

Payments Processing **Household 12727: Crane** UPDATE

**AUTOPAY PREFERENCES** Last Modified: Wed, Jan 09, 2019 at 5:20pm by vc.web Audit Log

Household Billing Preference ID	School Year	Invoice Type	Person	Checkout Payment Account	Checkout Payment Account ID	Payment Account Status
1	17-18	Compreh...	Crane, Monica	Visa 4608	23	Active

Another way to look up if the parent is enrolled in AutoPay, is navigating to the AutoPay Preferences query on the Payment's Processing Homepage.

# Payments Processing

## Homepage

<b>Rcpts Follow-Up Failed</b> <b>0</b>	<b>Failed Receipts</b> <b>0</b>
<b>Rcpts Pending Payout</b> <b>24</b>	<b>Simple Receipt Errors</b> <b>0</b>

### Payment Reporting

- Checkout Receipts >
- Payout Items >
- Master Payout Listing

### Other Reports

- Payout Mismatch Listing  
Listing of various discrepancies between Payout amounts and associated amounts stored in Veracross.
- Checkout Receipts: No Payout (summary)  
Summary of Checkout Receipts generated by Veracross that have no Payout information linked to them.
- Payment Accounts**
  - Checkout Payment Accounts
  - AutoPay Preferences**



### Payouts Not Fully Processed

Checkout Payout ID	Processing Status	Transfer Date	Gateway Provider	Transfer Amount	Total Checkout Receipts	CR Batch Total	CR Batch Total Posted
No Results							