

Direct Debit Online

Great News!

Families may now manage their direct debit accounts online!

In one easy step, your service may enable Direct Debit management within your Parent Portal. This means that your families will then be able to activate and/or update their Direct Debit account as required.

This tip sheet will walk you through:

- [Enabling Direct Debit Management within Parent Portal](#)
- [Viewing a Parent/Guardian's Direct Debit status](#)
- [Emailing a Direct Debit Request link](#)
- [Troubleshooting](#)

Summary

Enabling Direct Debit Management within Parent Portal

1. Select the Parent Portal tile.
2. Within the Configuration tab and under 'Others' check the 'redPAY' box and save.

Viewing a Parent/Guardian's Direct Debit Status

1. Open the Parent/Guardian's record and open the 'redPAY Payment Options' tab.
2. View the 'redPAY Direct Debit Account Status'.

Emailing a Direct Debit Request Link

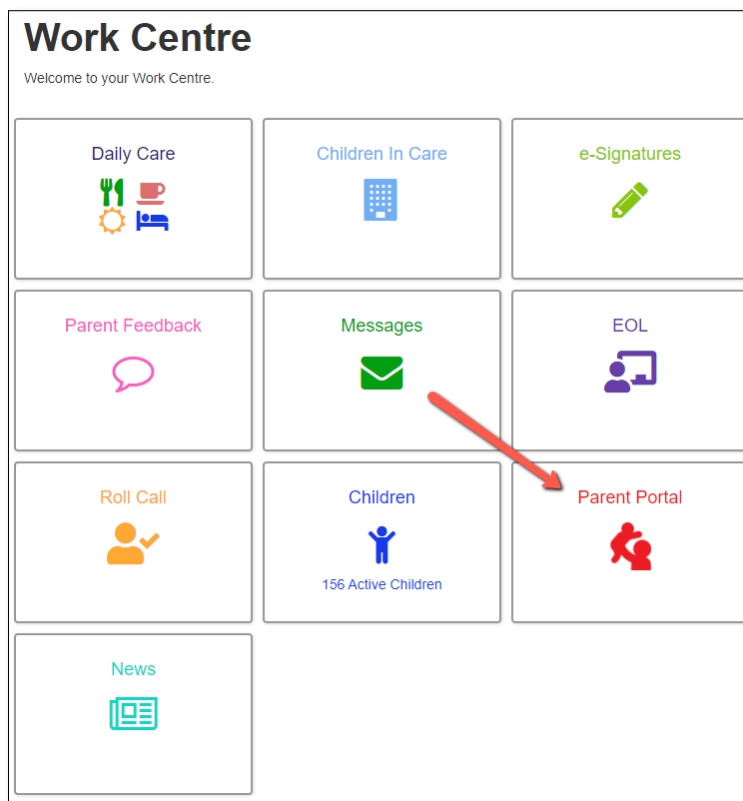
1. Open the reports menu and select 'redPAY'.
2. Select the form 'Direct Debit Request Form'.
3. Select a Parent/Guardian and click the 'Email' button.

Detailed

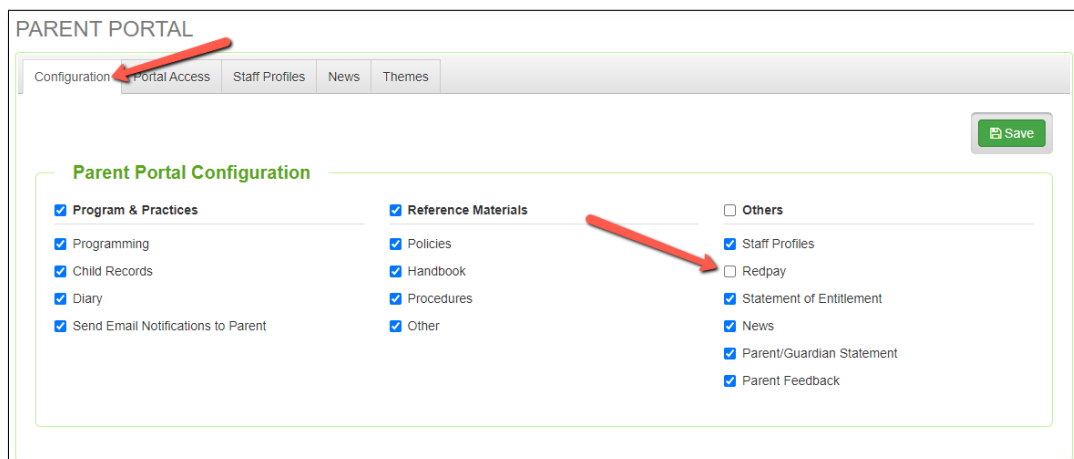
Enabling Direct Debit Management within the Parent Portal

To allow families to self-manage their Direct Debit accounts (from creating an account to updating their account details), your service will need to enable 'redPAY' within the Parent Portal Configuration settings.

First, select your **Parent Portal** tile from your Work Centre Dashboard:

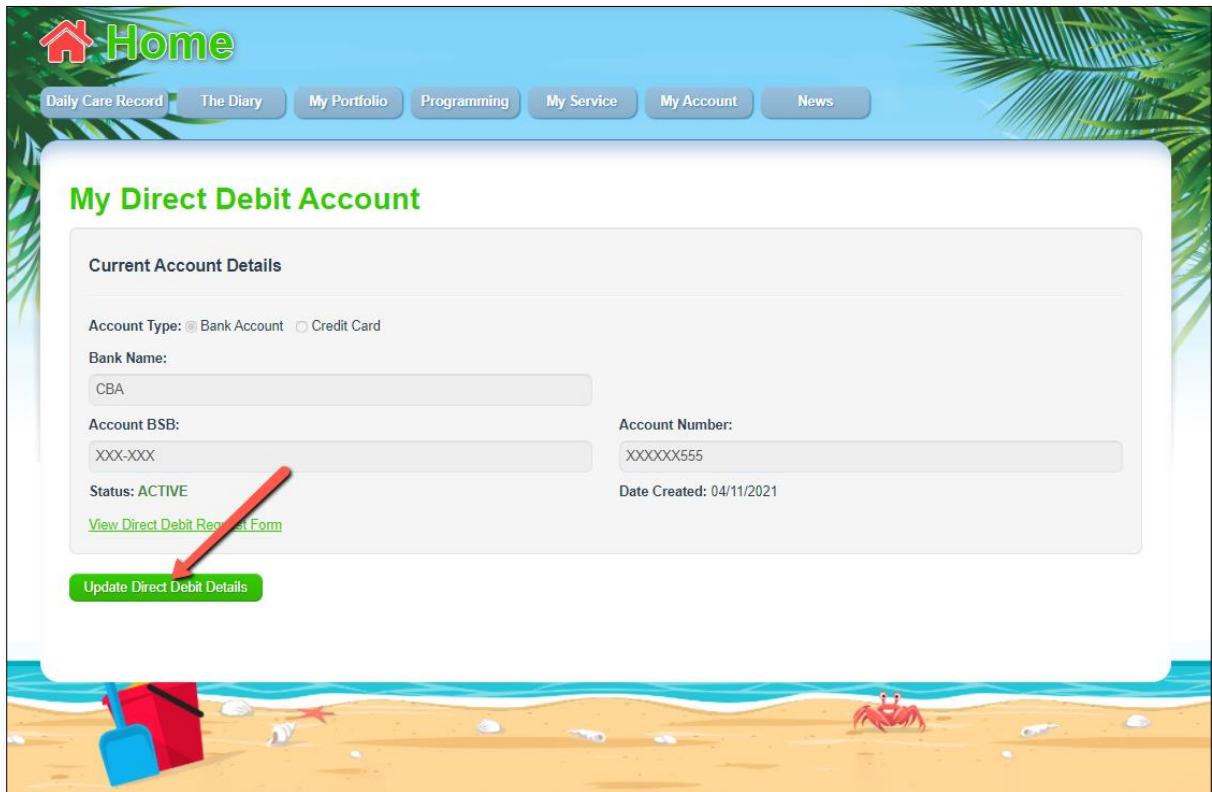


You will then need to open the **Configuration** tab (which should open by default):



Check the **redPAY** checkbox and then click **Save**.

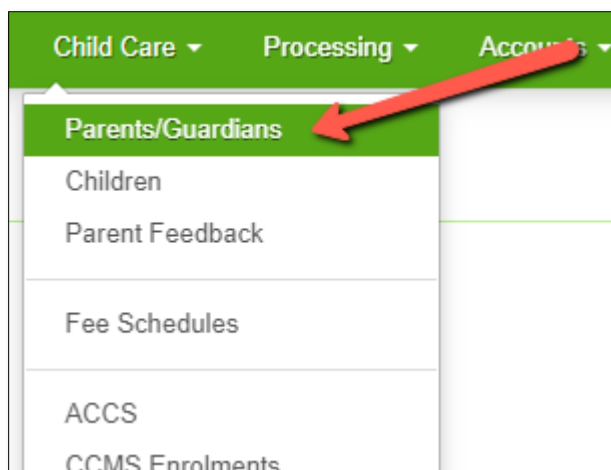
Upon next login, Parent/Guardians will be able to access their Direct Debit account settings via **My Account**.



Viewing a Parent/Guardian's Direct Debit Status

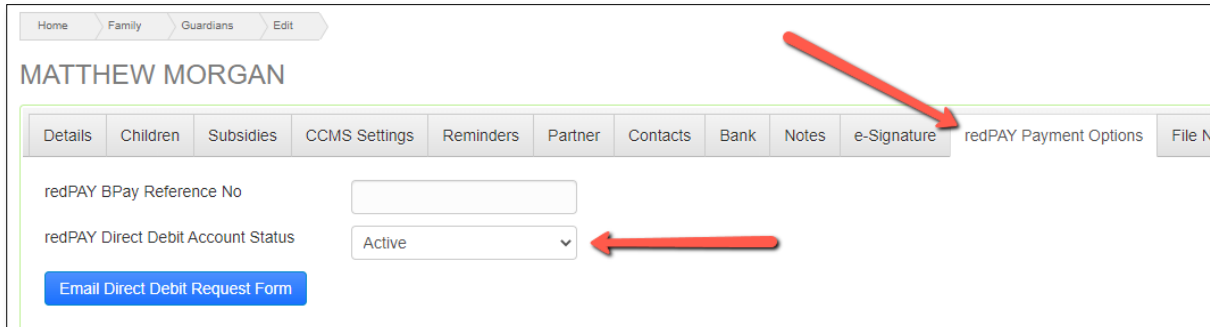
Your Parent/Guardian Direct Debit account status will instantly be updated within the respective Parent/Guardian record.

Via the Child Care menu, select **Parent/Guardians**:



Locate the Parent/Guardian within the list and then select **View** or **Edit**.

Open the **redPAY Payment Options** tab and locate the **redPAY Direct Debit Account Status**:



The screenshot shows a web interface for a parent/guardian named MATTHEW MORGAN. The navigation tabs include: Home, Family, Guardians, Edit, Details, Children, Subsidies, CCMS Settings, Reminders, Partner, Contacts, Bank, Notes, e-Signature, redPAY Payment Options, and File N. The 'redPAY Payment Options' tab is selected. Below the tabs, there are two input fields: 'redPAY BPay Reference No' (empty) and 'redPAY Direct Debit Account Status' (set to 'Active'). A blue button labeled 'Email Direct Debit Request Form' is located below the status dropdown. Two red arrows point to the 'redPAY Payment Options' tab and the 'Active' dropdown menu.

This will display the Parent/Guardian's current account status.

Active – indicates that the Parent/Guardian's Direct Debit account has been created, and payments may be debited from their nominated account.

Inactive – indicates that the Parent/Guardian does not have a Direct Debit account activated. The Parent/Guardian will need to submit a Direct Debit Request form to activate their direct debit account.

Suspended – indicates that the Parent/Guardian previously had an active direct debit account, but the account has since been suspended. The Parent/Guardian will need to submit a new direct debit request form to reactivate their direct debit account.

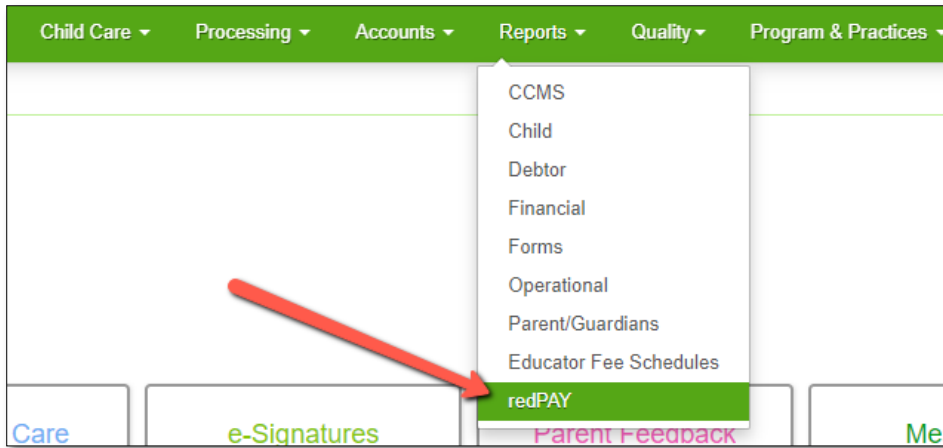
[Emailing a Direct Debit Request Form Link](#)

An alternative way to have families activate/update their Direct Debit accounts is via the Direct Debit Request Form link.

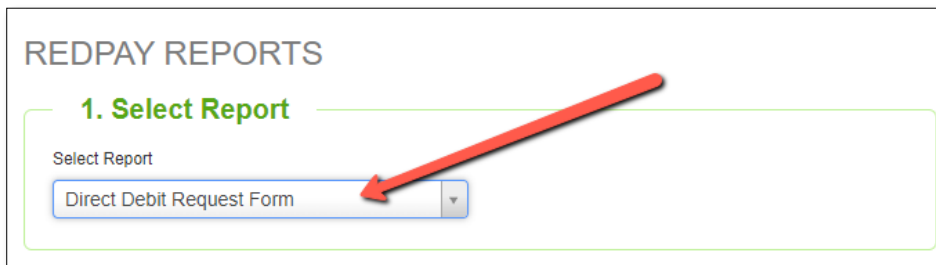
This method may be useful for the following scenarios:

1. Your service is not currently using Parent Portal, or
2. Someone other than the main Parent/Guardian is paying the fees (eg Grandparent etc).

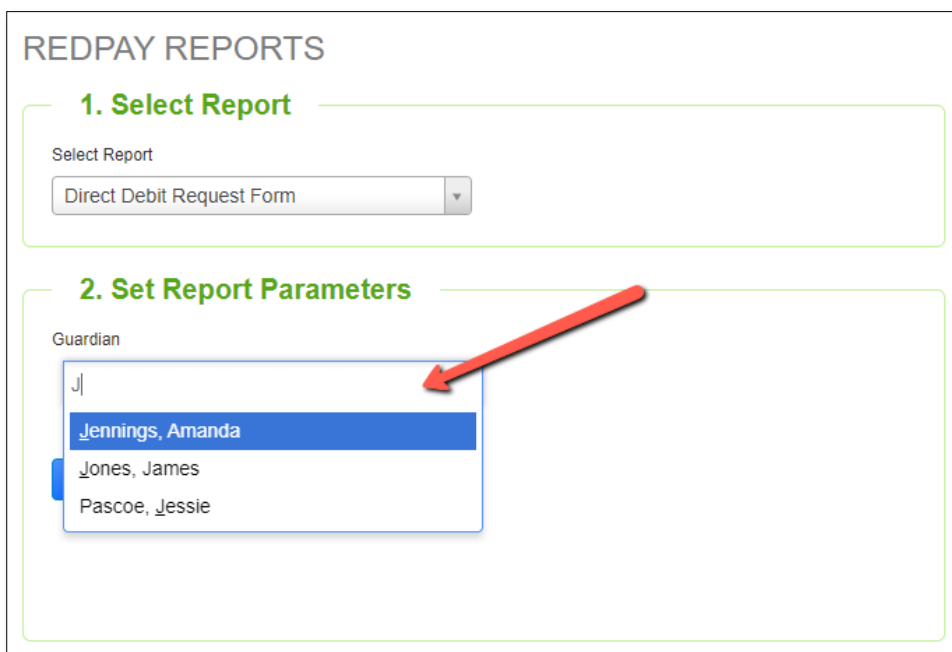
To email a Direct Debit Request Form link, select **redPAY** within the **Reports** menu:



Next, select 'Direct Debit Request Form' from the dropdown menu:



You may type search to select one, multiple, or all parent/guardians:



Once you have made your selection, click the **Email** button to send the form/s.

REDPAY REPORTS

1. Select Report

Select Report

Direct Debit Request Form ▼

2. Set Report Parameters

Guardian

✖ Jones, James

✖ Jennings, Amanda

All Guardians

Email

Download

Alternatively, within the Parent/Guardian's record, the redPAY Payment Options tab contains an 'Email Direct Debit Request Form' button, which will also email the form:

GEMMA ALLEN

Details
Children
Subsidies
CCMS Settings
Reminders
Partner
Contacts
Bank
Messages
e-Sign

redPAY BPay Reference No

redPAY Direct Debit Account Status Suspended ▼

Email Direct Debit Request Form

Once sent, the parent/guardian will receive an email containing a link and access code. This will grant them access to a secure Direct Debit Request form (identical to the form within Parent Portal) where they may activate/update their Direct Debit account.

Within the Parent/Guardian record, the **Emailed Direct Debit Request Forms History** section (located at the bottom of the redPAY Payment Options tab) will detail the history of events regarding the emailed links.

Emailed Direct Debit Request Forms History			
Date Sent	Sent By	Parent Response	Status
19/11/2021	Amanda Williams		Link Active
22/10/2021	Amanda Williams	22/10/2021 10:36:32 AM	Complete
14/09/2021	Amanda Williams		Link InActive
03/09/2021	Amanda Williams		Link InActive

Here, you will be able to track the full history of each link sent to the Parent/Guardian.

The **Date Sent** and **Sent By** columns will display the date the form was sent and which user sent it, respectively.

If the Parent/Guardian has activated/updated their account using the link, the **Parent Response** will display the date/time they submitted the form. If no date is visible, the Parent/Guardian has not activated/updated their account with the form.

The **Status** column will indicate the status of the link to the Direct Debit Request form. The following statuses may display:

1. **Link Active** – the form has been sent to the Parent/Guardian, and the link is live for them to activate/update their Direct Debit account online.
2. **Link Inactive** – the form has been sent, but the link is no longer active for the Parent/Guardian to use. A link may become inactive for several reasons:
 - a. A new link has been generated and sent.
 - b. The Parent/Guardian entered their email/access code incorrectly too many times (more than 5).
 - c. The parent/guardian did not access and submit the form within the 7 days provided.

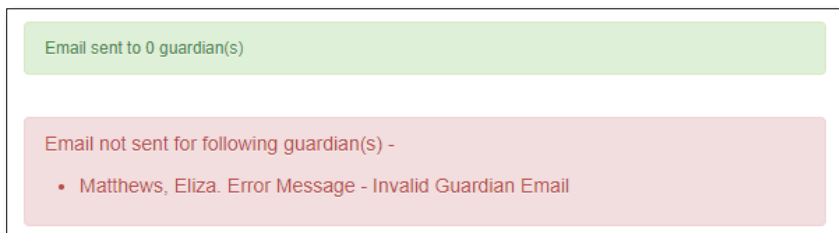
When a link becomes inactive, a new form will need to be emailed to the Parent/Guardian for them activate/update their account.

3. **Complete** – the Parent/Guardian has successfully activated/updated their Direct Debit account via the link.

Troubleshooting

Below are some common errors you may see regarding Direct Debit Online and how to resolve them.

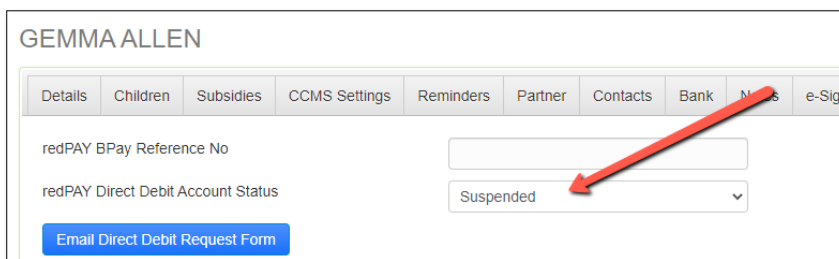
Error: Unable to email Direct Debit Request form.



Why? The Parent/Guardian does not have a valid email address.

Resolution: Edit the Parent/Guardian record, supply the email address and save. The Direct Debit Request form should now successfully email.

Error: Direct Debit Account is Suspended.



Why? The Parent/Guardian's Direct Debit account has been suspended. This may have been at the request of the Parent/Guardian or your service. Additionally, Direct Debit accounts may be suspended at a Bank's request (due to cards being reported as lost, stolen etc)

Resolution: The Parent/Guardian will need to submit a new Direct Debit Request form via the Parent Portal (or via the link) to activate their account again.