



MySchoolBucks
End of Year Instructions

Spring, 2021

MySchoolBucks End of Year Instructions

Online Payments Customers Only

Perform the following End of Year procedure if your district uses MySchoolBucks for online payment processing.

IMPORTANT: Please read the following section in its entirety before attempting the End of Year procedure. It is important that you complete the process in the order listed below as some actions are required and others are suggestions.

Frequently Asked Questions

When should I run my End of Year process?

Running the MySchoolBucks End of Year process is recommended prior to completing any End-of-Year procedures in Mosaic.

Is there anything I should do prior to running the process?

Yes.

- It is recommended you inform end-users/parents the last day the district will be accepting funds, your district's refund policy, a reminder to turn off automatic payments for their account if a student has graduated or is leaving the district, and suggest they review their automatic payment amounts.
- Ensure students who will no longer attend school for the upcoming school year are inactive in your POS system.
Note: If a student is not returning, but has a credit on their account and is due a refund, it is recommended that you inactivate the student.
- Import any payments from that have not yet posted.
- Establish Special Dates for non-payment periods.
- Issue refunds via your POS system.

What should I do if I am unsure how to proceed?

In the event you have any questions or are unsure how to proceed before or during this process, it is recommended that you call 1-800-803-6755 or contact MSB Support for assistance.

Update Dashboard

Two weeks before the end of the school, update the Dashboard on the MySchoolBucks website to inform parents of the following:

- The last day you will be collecting lunch funds.
- Your district's refund policy.
- A reminder to turn off all automatic payments on their account for graduating students or students leaving the district.
- Review automatic payment amounts.

As students are promoted to different grades or schools, it is important to remind parents that students' meals may be a higher price, so they may want to revisit the automatic payment amounts to accommodate the change in meal prices.

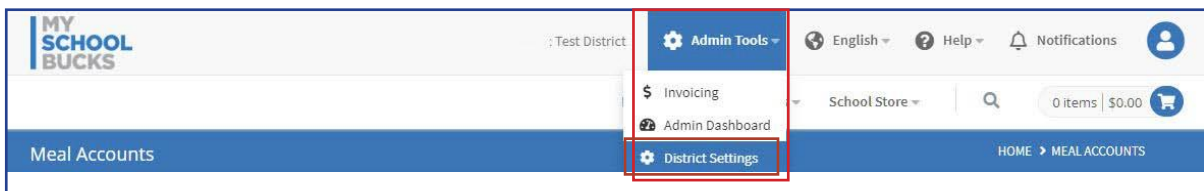
Perform the following procedure to update the Dashboard.

1. From the MySchoolBucks.com home page, enter your District Administrator login information and then click **LOG IN**.

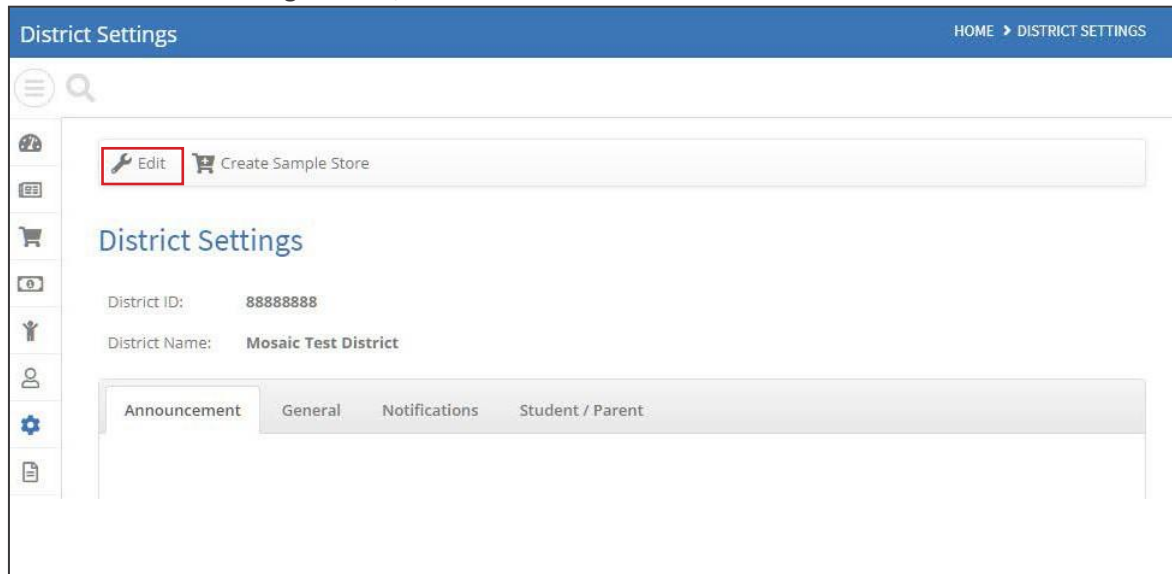


The screenshot shows the 'Log In to Your Account' page. It features a title 'Log In to Your Account' at the top. Below the title are two input fields: the first for an email address (containing 'example@test.com') and the second for a password (containing '.....'). There is a 'Remember Me' checkbox and a 'Log In' button with a lock icon. Below the login fields, there is a link for 'Forgot your username or password?' and a link for 'Don't have an account? Sign up today!'.

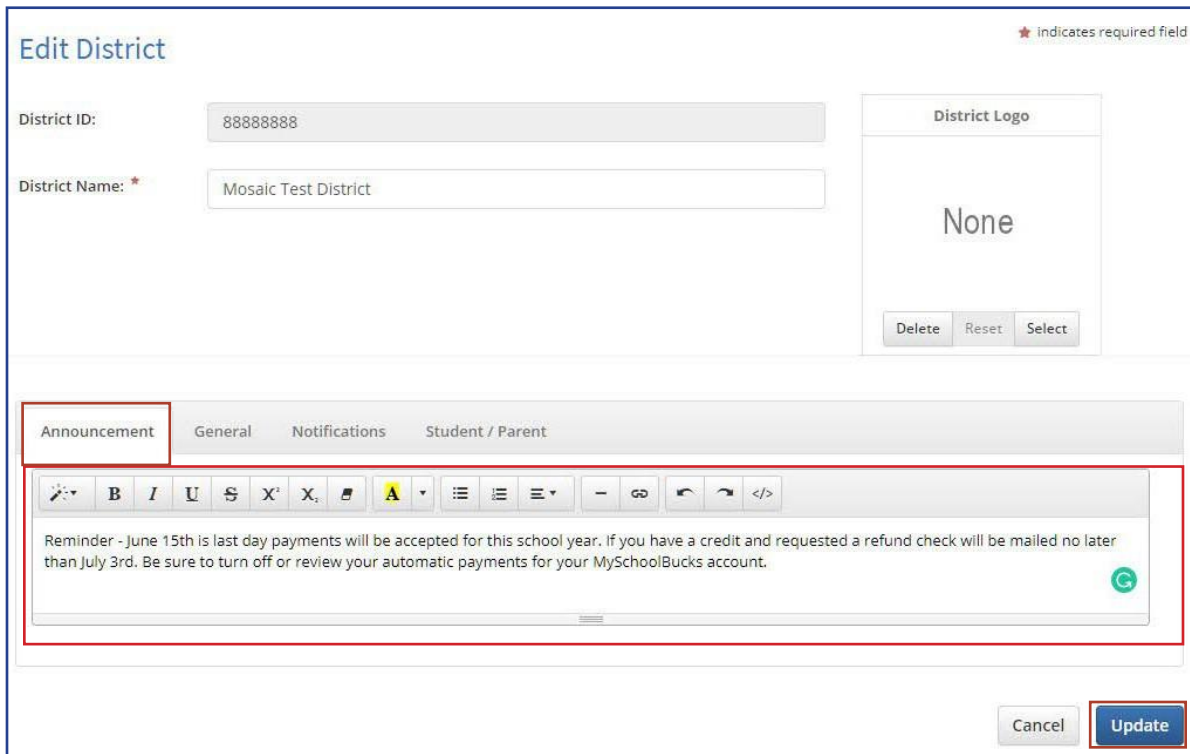
2. From the **Admin Tools** menu, select **District Settings**.



3. From the District Settings screen, Click **Edit**.



4. Select the **Announcement** tab and then type the information in the section regarding the last day you will be accepting payments, your school's refund policy, a reminder to turn off or review automatic payment amounts, etc.
5. Click **Update** to save the information.



Import Pending Payments

To ensure all pending payments have been pulled from the POS serving lines.

1. Open **Mosaic** and login.
2. Click **End of Day** in the left-hand navigation bar.
3. Click **Close Day**.
4. Verify all serving dates are reconciled. If not, ensure they are reconciled and then click **Close Day**.

Special Dates

Please review the [MySchoolBucks End of Year Process](#). Completing this process will ensure that manual or scheduled payments setup by the parents will stop during the summer break.

The Special Dates feature might be used if:

- Your school district does not wish to receive online payments over the summer.
- Nutrition server will be turned off over the summer (if server is off, balances will not update after payments are made).
- Your migrating to a new server.

If you have any questions or need additional assistance, feel free to MySchoolBucks Admin Support for additional assistance at 1-855-832-5226, Monday - Friday: 7 a.m. - 7 p.m. (Eastern Time).

Refund Student Balances

Provide refunds for students in accordance with your district's refund policy, especially for graduating seniors and students leaving the district.

Reminder: The MySchoolBucks support team does not retain any funds on behalf of the district or have the ability to process refunds.