Manage Credit Cards in the Parent Portal

Important Notes:

- To give your families the option to update credit cards in their Portal, the Parent Portal setting *Credit card information? (Tools > ePayment Settings > Credit Card & Bank Account Settings*) must be set to **Can Update**.

- If your provider supports multiple cards on file (SafeSave and C&H Financial) and you would like to offer this option to your families set *Allow 3 credit cards per family/account* to **Yes** *(Tools > ePayment Settings > Credit Card & Bank Account Settings*).

- If you allow parents to make payments via the Portal (see *Fees & Payments Settings* in the Help article **Set Up the Parent Portal**, the Primary Card is used when a payment is processed. If the family has more than one card on file and the parent does not want to use the card currently set as the Primary Card for a payment, they will need to reassign the status of Primary Card to the card they *do* want to use.

Add a Credit Card

1. Log into the Parent Portal, click on *Billing & Payments* on the Dashboard or from the right sidebar menu.

2. Click **Saved Payment Methods** under *Quicklinks.*

3. Click ⊕ button to add a credit card.

4. Enter the card information. **Note:** If only one card is saved, it automatically becomes the *Primary Card* on file. If more than one is saved the parent

must choose a Primary Card.

5. Click **SAVE.** The credit card is now listed on the **Saved Payment Methods** page.
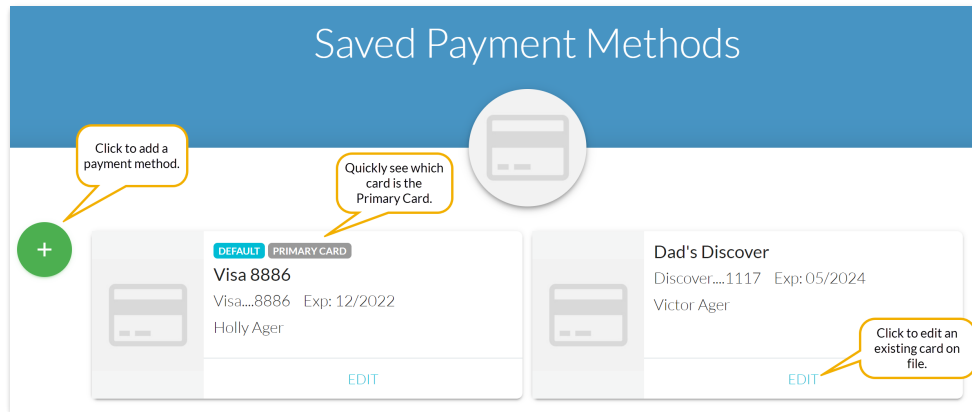
Edit a Credit/Debit Card

1. Log into the Parent Portal, click on *Billing & Payments* on the Dashboard or from the right sidebar menu.

2. Click **Saved Payment Methods** under *Quicklinks.*

3. Click **EDIT** to open the *Edit Credit/Debit Card* window.

4. Update the card as needed and click **Save.**

Delete a Credit/Debit Card

1. Log into the Parent Portal, click on *Billing & Payments* on the Dashboard or from the right sidebar menu.

2. Click **Saved Payment Methods** under *Quicklinks*.

3. Click **EDIT** to open the *Edit Credit/Debit Card* window.

4. Click the **Delete Card** button and confirm that you want to delete the card by clicking the **Yes, Delete** button. A confirmation will briefly display.

Delete Payment Method

Are you sure you would like to delete this credit card?

YES, DELETE

CANCEL
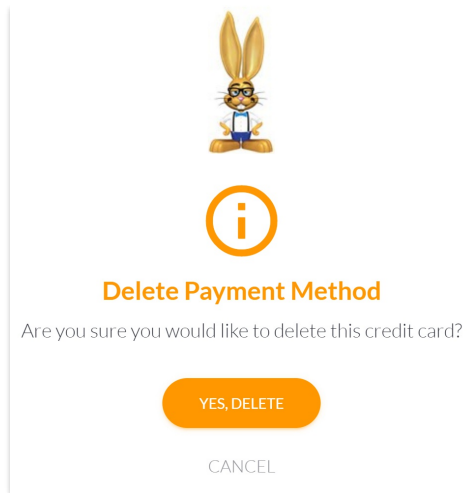
It is only possible for a parent to delete a credit card when they have added another card first. If a parent tries to delete the only card on the account they will see an alert advising them that they must first add another payment method before they can delete the card.