EDUCATION

Welcome to i3 Education and the PaySchools Customer Support Guide.

Whether you're a new customer or a longtime colleague and friend, I want to take this opportunity to thank you for your trust in PaySchools. My team and I work hard to earn that trust every single day.

PaySchools is a leading K-12 payment software company, but we know that you have a choice. That's why we decided long ago to be a cutting-edge technology company that valued old-fashioned people skills. We promise that our customer service is the best in the business.

Did you know that most of our competitors charge extra for training and customer service? PaySchools does not, no matter how much time or retraining you need. For our customers, that often adds up to significant savings.

What's more, my support team members—with a combined 152 years of PaySchools experience—treat customers like neighbors. First, you'll get a live, courteous support person in our US-based service office every time you call in during business hours. If you choose to email us during business hours instead, we'll get back to you within 30 minutes. And second, our goal is to be truly helpful and thorough the first time you reach out. We aim to fully resolve 90 percent of problems during that initial contact.

We've put together this guide as a reference to familiarize PaySchools customers with our support processes and people. But if you ever have a question not answered here, please call or email our support centers.

OUR TEAM

Rick Killian
VP of Operations
PaySchools

Adrian Drlik
Support Manager
PaySchools

Chelsea Brown
Implementation Manager
PaySchools

THE i3 EDUCATION SERVICE PROMISE

- ✓ At i3 Education, excellent customer service is just as important as excellent technology.

- ✓ We promise to provide complimentary product customization, training, and support.

- ✓ We promise to answer calls in person during business hours.

- ✓ We promise to return emails in a timely manner during business hours.

- ✓ We promise to be courteous and professional.

- ✓ We promise to solve problems thoroughly, in a single contact if possible and until you are satisfied with the resolution.

We're for schools.

Districts rely on our software for managing processes and handling payments and associated data for nutrition services, fees, donations, tickets, registrations, reporting, and more.

We serve **6 million** students every day

47 We work with more than **1,500** districts, **14,000** schools, **47** states & internationally

98% of our district customers return year after year

20 billion Together with our i3 sister companies, PaySchools securely processes more than **$20 billion** in paments each year

New Customers: Getting Started

After you're done working with your PaySchools sales representative to finalize your district's purchase order for PaySchools software and products, the PaySchools support team gets to work.

It's our job to take you through the customization, installation, training, and implementation as well as provide routine ongoing support.

Here are the steps you'll see unfold in the days to come:

1 **You'll receive an email from our Implementation Manager.**

Our Implementation Manager, Chelsea Brown, will email the district contact person you've provided to introduce herself and get the ball rolling. Within the email you will complete a kick-off form and schedule the kick-off call.

IMPORTANT: Please designate one person as your district's project leader for the PaySchools installation, training, and implementation process from here forward. This is an administrative, not technical, role. Your project leader will be our main point of contact and will help coordinate the participation of other district staff members and help track down answers to our questions as needed.

2 **You'll receive an invite from Wrike, our project management software.**

Please accept your invitation, sign in, and we'll review during our kick-off call.

3 **You'll sign and return the PaySchools Terms and Conditions Agreement.**

This is the type of legal document you'd review and sign in working with any software or financial vendor.

4

Your team will have a virtual meeting with the PaySchools Implementation Manager as well your PaySchools Installer.

Chelsea will arrange this meeting. It's the planning meeting for your team as well as ours, so it's helpful if everyone who will be involved can be there! While PaySchools will handle as many of the upcoming tasks as we can, software (and hardware) integration is always a collaborative process between the customer and vendor. To keep on track of your scheduled live date, due dates are applied to district tasks within Wrike.

From here forward, your PaySchools Installer will be your main PaySchools contact.

5

Your PaySchools Installer will gather data and complete customization.

Behind the scenes, your Installer will now be working to pull together all the parts and pieces to customize your PaySchools software, prep technology integration, and prepare for a smooth installation.

If your purchase order also includes cafeteria point-of-sale hardware, our PaySchools hardware specialist will also be in touch.

6

Your PaySchools Installer will install the software.

Because our software is cloud-based, installation will take place remotely. We'll let you know when it's ready to preview.

If you are having hardware installed, our hardware specialist will pre-install PaySchools Admin and QuikLunch. All you need to do is unbox and power on. If your order also includes on-site hardware installation, our hardware specialist will take care of all the set-up at your locations.

7

Your team will receive training.

The Implementation Manager will reach out to you to schedule training. The training session(s) will usually take place either right before or right after the software goes live, depending on which software modules you are using. Trainings are often conducted via live, custom webinar. Your team will gather at a computer or computers, and using a tool such as GoToMeeting, your Installer will Screen Share with you to give you a tour of the software, demonstrate how to carry out essential tasks, and answer all of your questions.

We also offer refresher webinars at the beginning and end of the school year as well as concise training videos on specific tasks. And we provide complimentary ad-hoc training as needed to new staff members. If your team ever needs additional training, just ask!

8

## Your PaySchools software will go live.

Once your installation is complete and your team has been trained, your PaySchools software will be up and running! Whenever you have questions or encounter issues, please reach out to our live support teams. We want you to feel comfortable calling or emailing us any time.

Cybersecurity

As a K-12 payment software company, i3 Education has always made data security a top priority. Our districts rely on us to keep financial transactions and confidential student and family data safe. We take this trust seriously, and we build all the latest security protocols into our software. Our Security Council at i3 regularly reviews and enforces best case security practices to out companies and several of our team members are **CISSP-certified**.

- **PCI Compliance:** Requires an annual PCI audit of our software, and our environment. Our environment is subjected to multiple intrusion tests as well as a number of additional security checks. The PCI review includes business practices, software, network, and data vulnerability. i3 Verticals is required to maintain the highest level of PCI Compliance, PCI DSS Service Provider Level 1.

- **SSL Certificates:** External communication is protected with 2048-bit SSL certificates. The SSL protocol secures and authenticates the connection between the customer's browser and the server ensuring all data transmitted is encrypted.

- **Vulnerability Assessment:** Utilizing an industry leader in cloud-powered vulnerability assessment and intrusion detection service to defend and protect systems against internal and external threats.

- **Managed Firewall:** The firewall limits access to specific applications protecting internal services from the outside intrusions. i3 Verticals uses an industry leading product that utilizes AI in the firewall and functions in an active redundant state.

- **Load Balanced:** Our managed redundant load balancers can handle high traffic volume and distributes that load across multiple servers for speed, efficiency, and redundancy.

- **Threat Management:** The redundant physical Web Application Firewall (WAF) leverages industry leading technology from the leader in web application security.
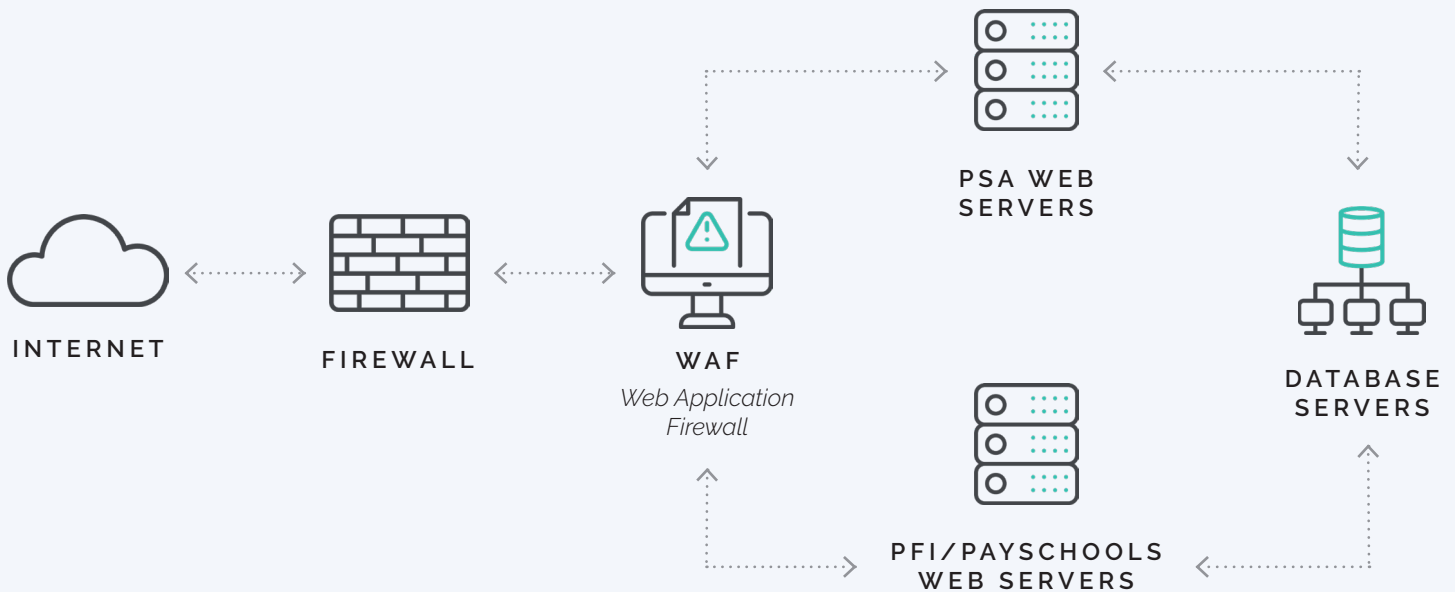
○ **Two-Factor Authentication:** Remote access to the servers is protected by Two-factor Authentication backed by industry-leading Duo Secure technology.

○ **Data Center Security:** The data center is PCI-DSS and Safe harbor compliant in addition to having SSAE16 TYPE II, SOC1, SOC2 (Security and availability only), and SOC3 audits on file for all data center Facilities.

○ **Anti-Virus:** Fully managed anti-virus software provides proactive sustained protection against viruses, worms, Trojans, spyware and other malware on all Windows and Linux servers.

○ **Redundancy:** Redundant web servers and failover dedicated database servers increase both the speed and availability of system services.

○ **Backups:** Servers are backed up daily and all databases are backed up every 12 hours. Data is stored on high-speed RAID arrays and accessed over a Fiber Channel Fabric that ensures the best performance and the highest protection.

○ **Web Software:** Access is limited by user and critical data is encrypted when stored in the database.

○ **Data Privacy:** We are fully compliant with the Family Educational Rights and Privacy Act (FERPA), which protects student and parent information. We do not share, rent, or sell customer information to other companies.

Ongoing Support

The PaySchools support team is standing by to help you with anything you need.

When you call our support centers, your call will be placed in a queue and answered in the order in which it was received. The system will tell you the expected wait time. We are typically able to get to your call within a minute or two, though at the beginning of the school year the wait times can be a little longer.

Our call system now also offers a call-back option. If you would rather be called back than placed on hold, simply make that choice in the call system. You are also welcome to email us with your support questions! During business hours, we try to respond within 30 minutes to all customer emails. All support requests, whether on the phone or via email, receive a ticket number. We will send you a follow-up email with the ticket number in case you need to reference a previous conversation. What's more, we do not close out support tickets until you tell us you are completely satisfied with the resolution.

Large school districts with particularly complex needs are also assigned a designated PaySchools representative called a Key Account Manager. This is the main support person you will get to know and can reach out to at any time.

And don't forget that we offer complimentary ongoing training. If your team needs a refresher, if you're having trouble with a certain task, or if you have new staff members that need to be trained, we're happy to schedule a custom training session. We also offer refresher webinars at the beginning and end of the school year as well as concise training videos on specific tasks. To access our training video library, please visit www.payschools.com/training.

Finally, our support team is available to help you with product customization. If you need a custom report in PaySchools Admin, for example, or would like help setting up custom layouts and items on your PaySchools Lunch screens, we've got you covered. Just call and ask!

This service is complimentary and is just one of the ways that we demonstrate going above and beyond.

How to Contact PaySchools Customer Support

○ Note: We answer emails within 30 minutes, but calling by phone is always the fastest way to resolve your issue.

📞 By Phone

1-800-669-0792

Select the product you need help with:

1. Support
2. Installations & Training
3. Billing
4. Sales

District support center hours of of operation: 7 am - 6 pm EST, Monday - Friday

If you leave a message after hours, we'll catch you back as soon as we can.

✉ By Email

support@payschools.com

Subject Line: [District name] + brief description of problem

Body of Email: Detailed description of the issue you need help with. When appropriate, please include photos, screen captures, email threads, etc. The more information, the better!

For Parents

📞 1-877-393-6628

✉ PSC_help@payschools.com

🕐 **Parent support center hours of operation:**
8:30 a.m. – 7:30 p.m. EST, Mon-Fri

The i3 Education Software Family

PARENT PAYMENTS

With our software, parents can easily pay for student lunches, fees, and more... anywhere, on any device. And school staff can use our browser-based tools to log every purchase and payment.

- ✓ PaySchools Central
- ✓ SchoolPay

NUTRITION SERVICES

Our cafeteria cashier software and hardware speed up lunch lines, integrate vending, sync with online parent payments, and even help optimize food inventory.

- ✓ PaySchools QuikLunch
- ✓ Menu Planning & Analysis
- ✓ PaySchools QuikApps
- ✓ Pre Order
- ✓ PaySchools Inventory
- ✓ Concessions

TICKETING & EVENTS

Our events software allows schools to sell barcoded events tickets online and in person.

- ✓ PaySchools Events

SchoolPay®
An i3 Education Product

PaySchools
An i3 Education Product

i3 EDUCATION