OSMS Back To School Guide

Get ready for FY2020!

For Parents

- **OSP the app** – The power of OSP, now in an app! To learn more: **osmsinc.com/osp**
- **Read our new Parent Quick Start: tinyurl.com/ospparentguide**

For Schools

- **Encourage parents to download our new OSP app!** To learn more: **osmsinc.com/osp**
- **Make products!** Read our new OSP Bookkeeper Quick Start for help: **tinyurl.com/ospbookkeeperguide**
- **Read our newest instructions: tinyurl.com/osmsquickstarts**
- **Update your bank info** (if not managed by your Central Office)
- **Confirm staff have access to OSMS if needed**
  - ○ Setup → Sponsor/Teacher Setup
  - ○ Reports → Additional Reports → User and Usage Reports
- **Take a free training! tinyurl.com/osmstrainingcatalog**

For Central Office

- **Encourage parents to download our new OSP app!** To learn more: **osmsinc.com/osp**
- **User Changes** – Staff may need their user accounts adjusted. See the template below
- **Confirm your OSMS setup** – Request a copy of your current users and/or current bank info
- **Double check your main contacts** – Make sure you're getting our monthly sales emails and update notes
- **Change Your Service Fee** – Alternate options so parents don't pay the service fee
- **Review our newest 2019 enhancements including:**
  - ○ Workflow approval for product creation
  - ○ New reports for districtwide and schools
  - ○ New version of OTR!
- **Integrations** - Power up your OSMS with integrations!
  - ○ **OAI** – Automate your fees and invoices
  - ○ **OTR** – Take invoices and payments in person with cash, check and credit card
  - ○ **OMS** – Take payments with our school facing app!
  - ○ **Automate your users** – LDAP/SSO, Active Directory now available
  - ○ **SAF integration** – Connect your School Activity Fund accounting software to OSMS
  - ○ **SIS integration** – Validate your student data and expanding your reporting capabilities

Support Team Help

If you have any questions about Online School Payments or need any assistance getting started, please contact the OSMS support team first at **support@osmsinc.com** or **703-378-8299 x204**.

Multiple School Update Template

Preferred template for adding new Schools, changing user accounts and/or updating bank info for 2 or more schools.

School Info			Bookkeeper Info					Banking Information		
School Name	School Level (Elementary, Middle, High, etc.)	TRA/EPES School ID or Location #	Last Name	First Name	User ID	Email Address	Phone Number	Bank Name	Routing Number (9 digits)	Account Number (with any leading zeros)

Important:

- Please contact OSMS Support for a copy of the official Excel template.
- Please submit via email to **support@osmsinc.com**.
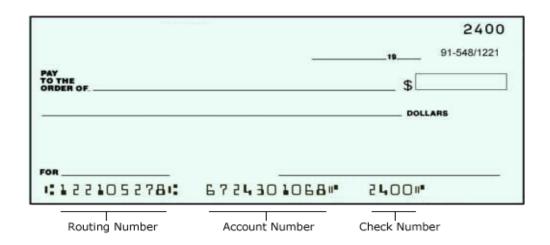 - Standard turnaround is **5-10 business days** to complete during the busy back to school season (July to October).

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Online School Management Systems, Inc.

ACH Authorization Form

For One School Only

As a duly authorized representative of _____ (name of school), I authorize Online School Management Systems, Inc. ("**OSMS**"), to automatically credit the bank account listed below and debit the account if refunds are needed (as authorized by the school). This authorization is valid until we provide OSMS with written notification terminating this authorization.

Bank Name _____

Location _____

ABA Number _____

Account Name _____

Account Number _____

Account Contact Person and Phone_____

_____   _____   _____
Authorization Signature   Print Name   E-Mail and Phone Number

Please mail, fax or email the completed form to: Online School Management Systems, Inc., 22375 Broderick Drive, Suite 130, Sterling, VA; Fax (703) 378-8137, e-mail support@osmsinc.com

	2400
	91-548/1221

PAY
TO THE
ORDER OF _____ $[   ]

_____ DOLLARS

FOR _____   _____

⑆122105278⑆   672430106811"   2400"

Routing Number   Account Number   Check Number

Please attach voided check here

Online School Management Systems, Inc.

Service Fee Modification Form

As a duly authorized representative of _____ (name of school/district), I authorize Online School Management Systems, Inc. ("**OSMS**"), to change our service (handling) fee for transactions paid via credit card. I accept that changing the credit card service fee will update all OSMS modules at affected site(s). This includes but is not limited to: OSP, OTR, OSR, OMS, OSC etc. I understand that by submitting this form, I will likely alter the total amount of funds I will receive from OSMS Inc. Finally, I acknowledge that credit card companies (Visa, MasterCard et al.) must be paid their processing fees, of which makes the bulk of the OSMS service fee.

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1. **Is the service fee is being modified at individual schools or district wide? (If this is form is on behalf of multiple schools with multiple modifications, please submit one form for each change).**

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2. Service Fee Modification

Select up to 2	Type	Service Fee	Generic Example for $100 item
	Parent Pays	Fee will be added to the subtotal	$100.00 + $4.35 = $104.35 total charged. School receives $100.00
	School Pays	Fees removed of net	$100.00 - $4.35 = $95.65 sent to school. No additional fees
	District Pays	Invoice sent to district every month	$100.00 sent to school. Monthly invoice will include the $4.35 owed. Districts have Net30 and may ACH or pay via check
	Hybrid	Both schools and purchasers will be accessed a portion of the total service fee	Depends on customization
	G&A Aggregation	Charge extra fees to earn rewards. Anything above standard 4% can go to the district. May use any Type in the list above	Parent Pay example: $100.00 + $5.35 = $105.35 total charged. School receives $100.00. Central Offices retains the balance to augment G&A expenses

If Hybrid and/or G&A Aggregation option is selected, please detail here: _____

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3. **When is the preferred start date for this modification? (Please select a 1st or 16th so it matches the OSMS ACH schedule).** _____/_____/_____

_____   _____

Authorization Signature   *Print Name*

_____/_____/_____   _____   (_____)_____-_____

Date   *E-mail*   *Phone Number*