

MyKidsSpending

User manual

Create account

This form lets you create a MyKidsSpending account so you can manage your child's school spending. Let's walk through each section.

Create account

Get started on our platform.

* First name

 Jane

* Last name

 Doe

* Phone number

 212-456-7890

* Email

 you@example.com

* School / Company



 School

Enter the code sent by the institution.

* Student First Name

 Jane

* Student Last Name

 Doe

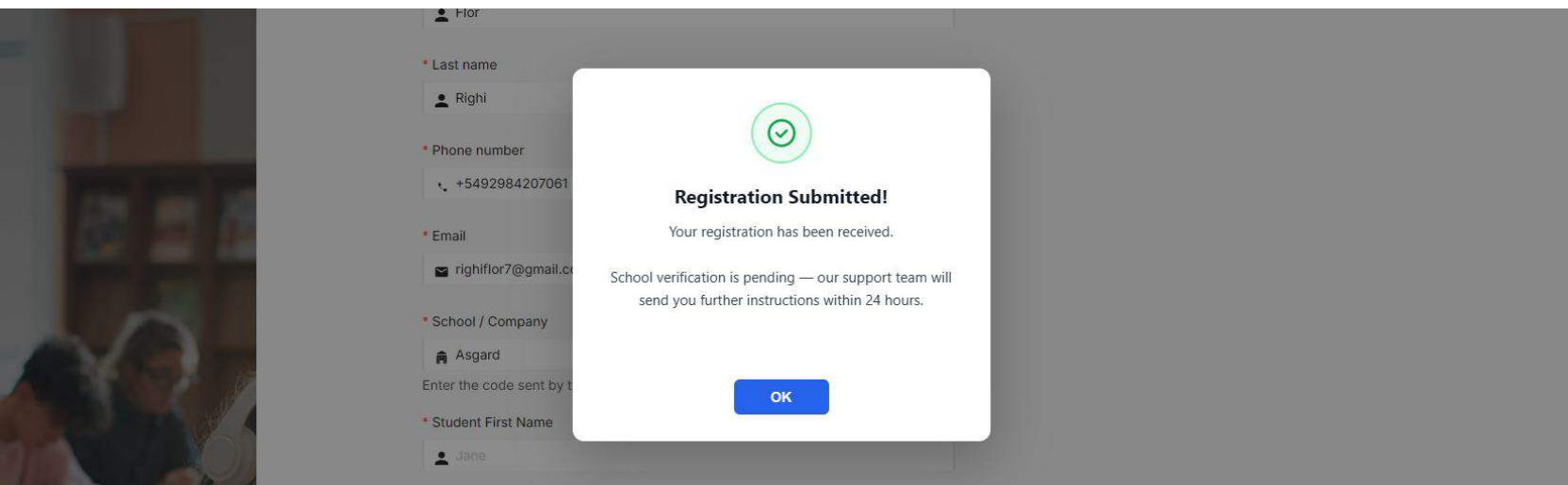
* School / Student ID

 123456

☐ By proceeding you agree to our [Privacy Policy](#) and [Terms & Conditions](#)

Register

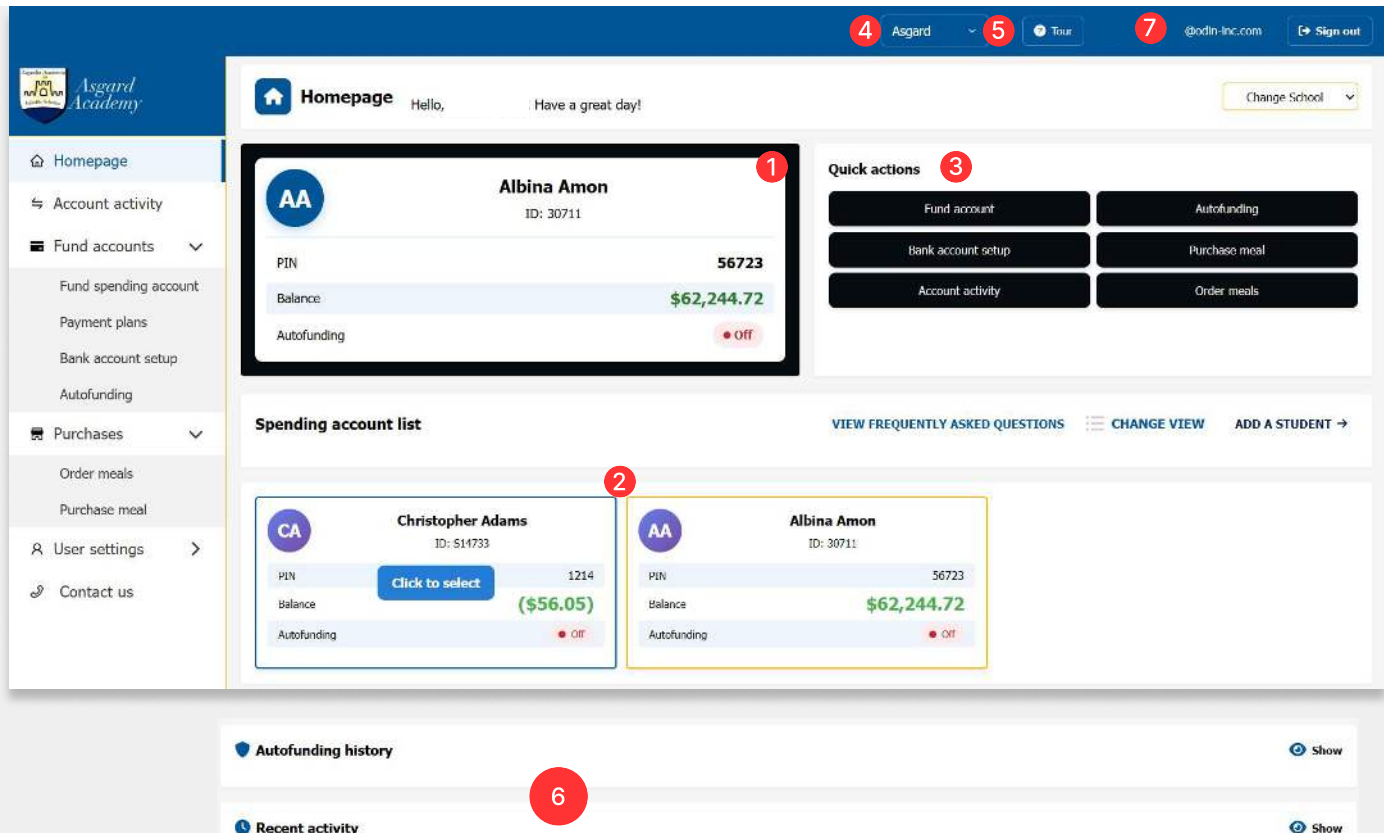
- 1. Parent information** Enter your first name, last name, phone number, and email address. All fields marked with an asterisk (*) are required.
- 2. Select your school:** Type your school or company name exactly as it appears on official communications. The system will verify the match. If no match is found, you can still register and our support team will follow up.
- 3. Student information** Enter your child's first name, last name, and Student ID. This information is used to link your account to your child's school records.
- 4. Terms & Agreements:** Review and check the agreement box to confirm you accept the terms of use before registering.
- 5. Complete Registration:** Once all fields are filled in, click this button to create your account. If your student cannot be matched right away, you'll receive a notice, your student won't appear on the account until the match is confirmed. This can happen if the school is still being set up, or if there's a typo in the name.



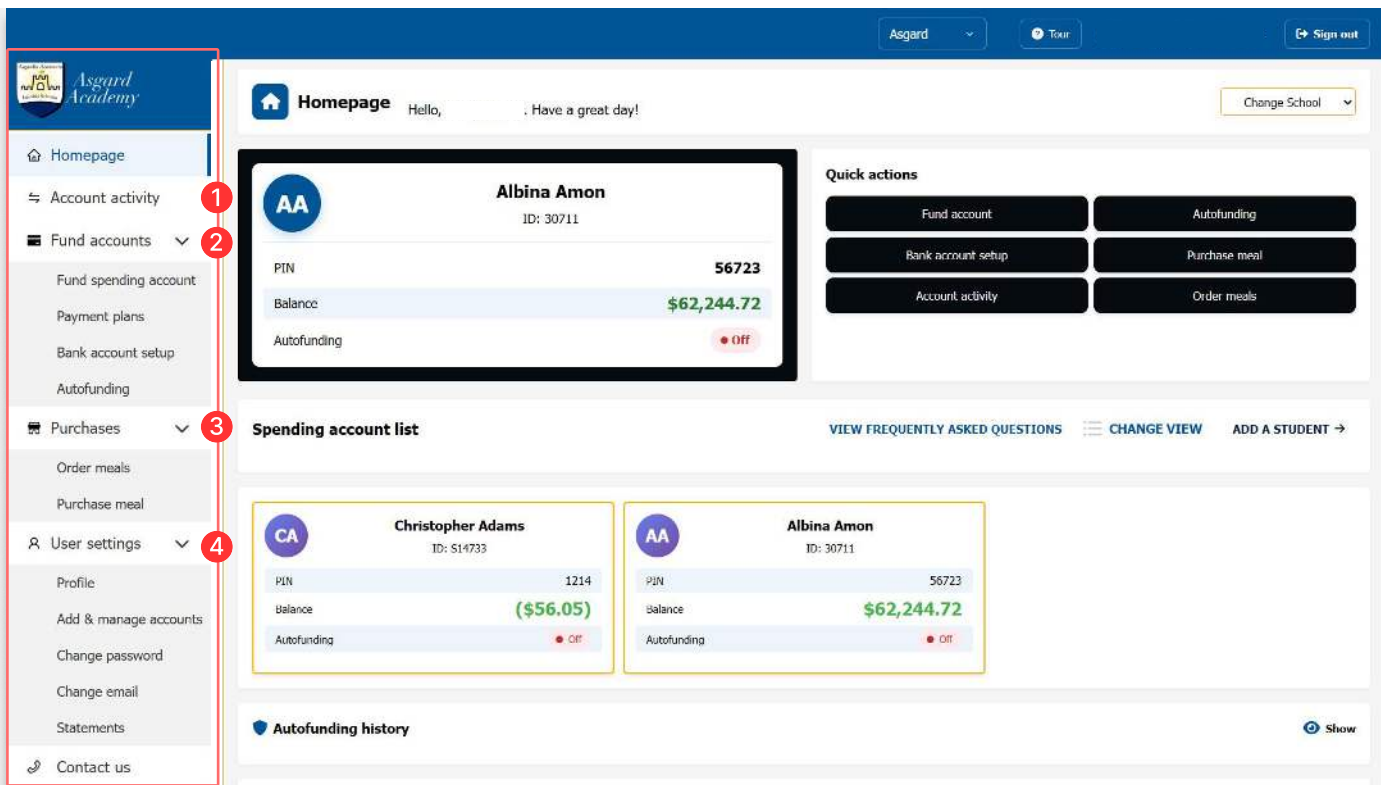
MyKidsSpending

Homepage guide

This is your homepage where you can manage all your spending accounts



1. This area shows the account you currently have selected and can perform actions on that account.
2. The Spending account list. Click on any account card below to select it and see its details here. Here are all of your spending accounts with their current balances.
3. Once you select an account, use these buttons to quickly perform actions like funding, viewing account activity or other related actions.
4. If you have accounts at multiple schools under your login, use this drop-down to switch between them. You will see your students under each school.
5. Key pages have the Tour available to explain step by step what information is on screen and what inputs are needed to perform a task.
6. Recent activity & Autofunding history, click "Show" to see recent transactions, deposits, and autofunding changes for your accounts.
7. Click here to securely sign out of your account when you're done!



1. **Account activity:** previously known as **Summary**: you can view a detailed history of all transactions on a spending account, including purchases, deposits, and other balance changes.
2. **Fund account:** This section has options for funding your student's spending account.
 - **Fund spending account** lets you add money using a credit card or bank transfer.
 - **Payment plans** lets you view and manage recurring payment schedules offered by the school.
 - **Bank account** setup lets you save your bank details to enable direct transfers.
 - **Autofunding** lets you set up automatic deposits when the balance drops below a threshold you choose.
3. **Purchases:** This section has buying options offered by your school.
 - **Order meals** lets you browse the school menu and order meals in advance for your student.
 - **Purchase meal** lets you buy meal plans, school supplies, or other items the school offers.
4. **User settings:** This section contains your personal account settings.
 - **Profile** lets you view and update your personal information.
 - **Add & manage accounts** lets you link additional students to your login.
 - **Change password** lets you request a password reset link sent to your email.
 - **Change email** lets you update the email address used for signing in and notifications.
 - **Statements** lets you request financial statements or set up automatic email alerts.

Add & Manage accounts

This is your User Settings page. Here you can add spending accounts to your login and view all accounts linked to it.

The screenshot shows the 'User settings' page with a sidebar on the left containing links: Homepage, Account activity, Fund accounts, Purchases, User settings (expanded), Profile, Add & manage accounts (highlighted), Change password, Change email, Statements, and Contact us. The main content area is titled 'User settings' with a subtitle 'Change and edit all the settings your login has.' Below this is a section 'Add a spending account to this login' with a subtitle 'Add existing users to your login and manage their info in one place.' The form contains fields for 'First name' (John), 'Last name' (Doe), 'ID number' (123456), and 'School' (Asgard). A note states: 'The current school is set by default. If you want to add a student from a different school, please check the box below, then type in the name of the school.' There is a checkbox for 'Override default school choice' which is currently unchecked. At the bottom are 'Add' and 'Cancel' buttons.

1. Use this form to link an existing spending account to your login. Enter the student's first name, last name, and ID number to match them to the correct spending account.
2. The current school is filled in automatically. If the student is at a different school, use the override option below.
Check this box to manually type a different school name. Use the lock icon or "More schools" button if you have multiple schools.
3. This table shows all spending accounts currently linked to your login, including balances, IDs, and school info.

The screenshot shows the 'Spending accounts associated with this login' table. The sidebar is the same as in the previous screenshot. The table has five columns: NAME, BALANCE, STUDENT ID, PIN, and SCHOOL. It lists six accounts: Christopher Adams, Albina Amon, Cash/Credit Card Pur No Account Used, Khalil Reese, Darth Vader, and Loid Liesmith.

NAME	BALANCE	STUDENT ID	PIN	SCHOOL
Christopher Adams	(\$56.05)	514733	1214	Asgard
Albina Amon	\$52,244.72	30711	56723	Asgard
Cash/Credit Card Pur No Account Used	(\$414.59)	0		Asgard
Khalil Reese	(\$158.59)	03672	20056	Valhalla
Darth Vader	(\$158.59)	20	20	Valhalla
Loid Liesmith	\$1,292.44	9	1004	Valhalla

If you need assistance, please contact us at (877) 888-0080 or toll-free at (555) 302-0070. You can also email us at SUPPORT@MYSPENDING.INFO.

Account summary guide

Account activity See your spending accounts movements.

Account summary 1 Selected spending account: Christopher Adams [Change spending account](#)

***Please select date range first** 2

Select a start date on the first calendar and an end date on the second. Use the arrows to navigate months, then click Update.

From: (statement start date) 01/03/2026 To: (statement end date) 30/03/2026

[Update summary](#) [Export as PDF](#)

Summary	Balance as of end date (03/30/2026)
	(\$56.05)

Movements on main balance this period (03/01/2026 - 03/30/2026)	Total
Spending during period	\$35.00
Deposit during period	\$45.00

1. This shows the currently selected spending account. You can click "Change spending account" to switch to a different student.
2. Pick a start and end date to define the period you want to review, then click "Update summary" to load the results. You can export your information as PDF too.
3. This section shows the account balance as of your selected end date, along with spending and deposit totals for the period.

Spending details 1 Total: \$15.60 Show: 10 per page Hide

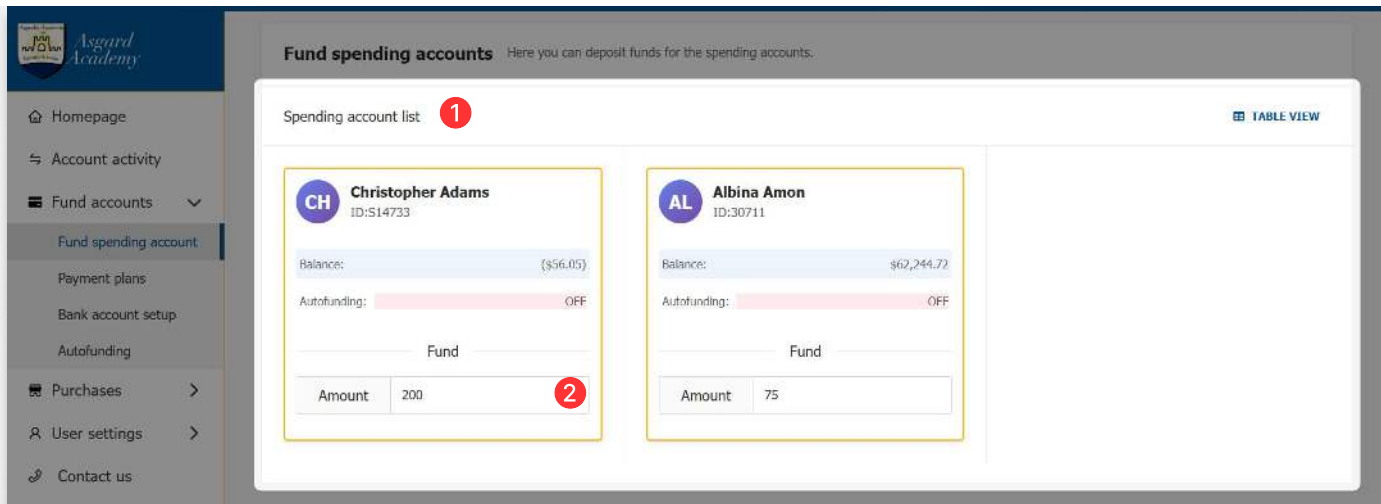
Item	Quantity	Date	Time	Amount
Cafeteria Subtotal: \$3.60 Hide				
Hot Dog	1	03/03/2026	-	\$2.00
Soda	1	03/03/2026	-	\$1.00
School Shop Subtotal: \$12.00 Hide				
Item	Quantity	Date	Time	Amount
Item	1	03/03/2026	-	\$12.00

Deposit details 2 Total: \$15.60 Show: 10 per page Hide

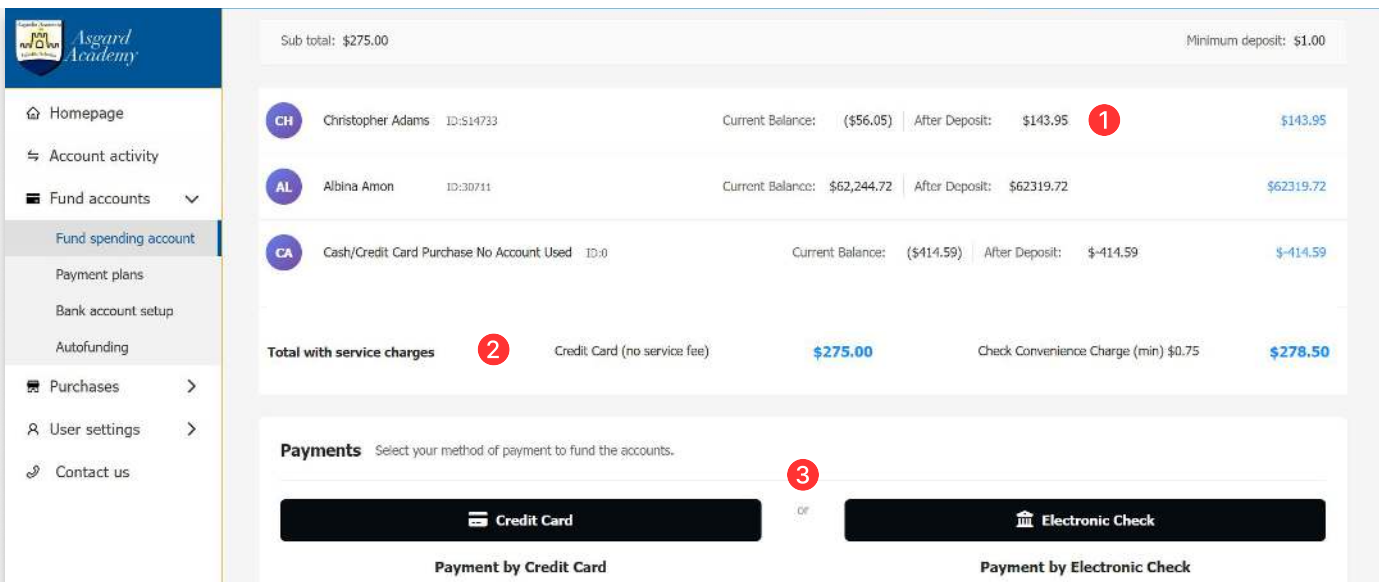
Reference number	Date	Time	Amount
XXXXXXXXXXXX	03/27/2026	4:40 PM	\$15.60

- 1. Spending Details:** You can see a detailed breakdown of all spending transactions, grouped by area. You can expand, collapse, and paginate each section.
- 2. Deposit Details:** You can see all deposits made during the selected period, including reference numbers and amounts.

Fund account guide

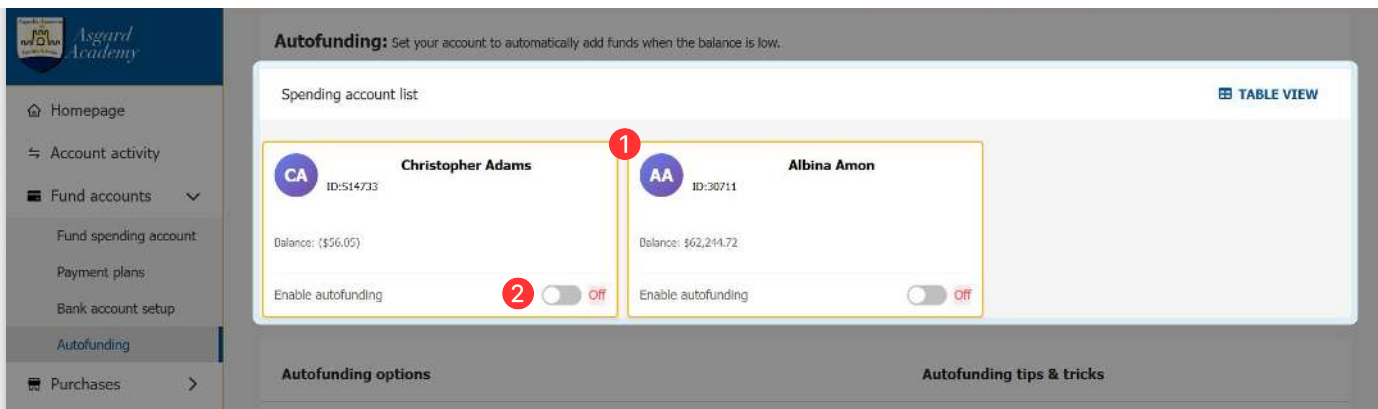


1. Each of your spending accounts is listed here with its current balance. You can fund one or more accounts at a time.
2. Type the dollar amount you want to deposit into each account. The minimum and maximum amounts are shown below the input.

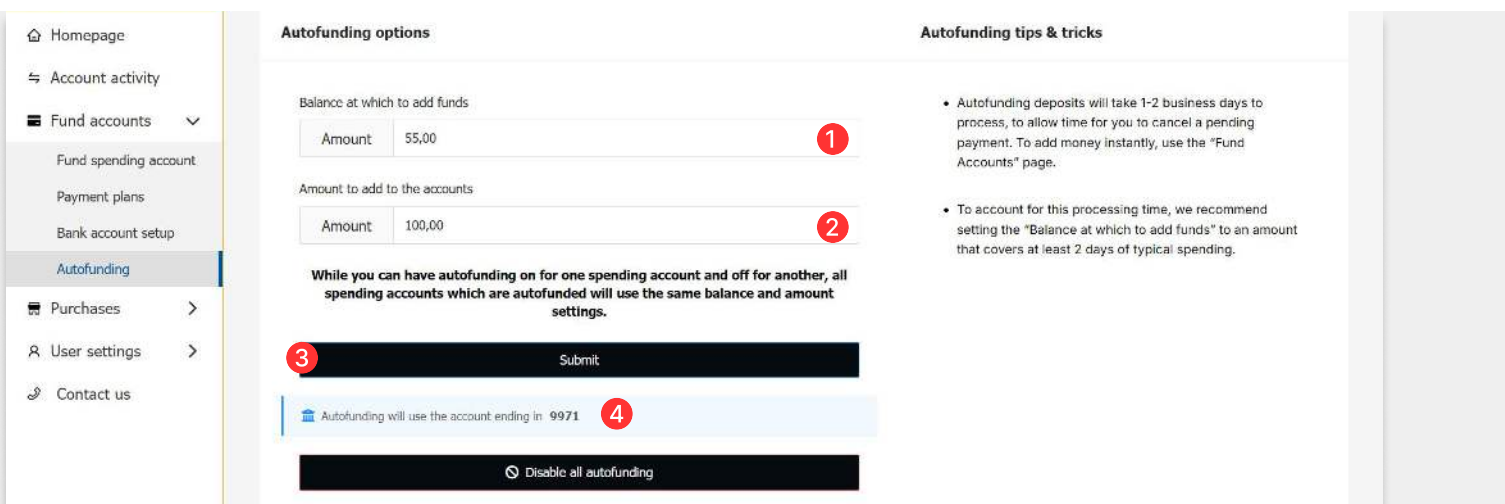


1. This section shows your current balance and what it will be after the deposit, so you can see the total at a glance.
2. Any applicable service charges for credit card or eCheck payments are displayed here, so there are no surprises.
3. When you're ready, choose how to pay, Credit Card or eCheck (bank transfer). Click a button to proceed to payment.

Autofunding



1. Each card represents one of your child's spending accounts. You can see their name, student ID, and current balance at a glance.
2. Use the toggle switch on each card to enable or disable autofunding for that student. A bank account must be set up before you can turn it on.



1. This is the balance that triggers a deposit. Low Balance Threshold. When an account drops below this amount, autofunding will kick in and add money automatically.
2. This is how much money will be added each time autofunding activates. It applies to all accounts that have autofunding turned on.
3. After setting the threshold and amount, click Submit to save. These settings apply to every student with autofunding enabled.
4. The bank account currently displayed will be used for autofunding deposits. **If you don't see this, you need to set up a bank account first on the eCheck Setup page.**

To account for this processing time, we recommend setting the "Balance at which to add funds" to an amount that covers at least 2 days of typical spending.

Purchase meal plan

The screenshot shows the 'Purchase item' page of the MyKidsSpending portal. On the left is a sidebar with navigation links: Homepage, Account activity, Fund accounts, Purchases (expanded), Orders and activities, Purchase meal plan (highlighted), User settings, and Contact us. The main content area is titled 'Purchase item' with a subtitle 'Here you buy an item or meal plan for your spending accounts.' Below this is a 'Select a spending account' section with a dropdown menu showing 'Darth Vader - ID: 29'. A table lists available items for purchase:

Item name	Price	Actions
Full Week for Full Year	\$150.00	+ Select item
Full Week for Semester	\$0.00	+ Select item

Below the table is a 'Payments' section with the subtitle 'Select your method of payment.' It features three buttons: 'Credit Card', 'eCheck', and 'Payment plans'. The 'Credit Card' button is selected, leading to a 'Payment by Credit Card' section. This section contains the following text: 'The Credit Card convenience charge is 4.00%.', 'The minimum convenience charge is \$3.00.', and 'There is a \$40 charge for a credit card chargeback from a contested charge. For each deposit by check, there is a service charge of 75 cents plus 1% of the total deposited. For example, for a deposit of \$100, the fee would be \$1.75.' Below this is a 'Payment by Electronic Check' section with the text: 'For each payment returned unpaid by the bank, there will be a \$20 charge to the account.'

- 1. Select an account:** Choose which spending account you want to purchase items for using this drop-down.
- 2.** Browse the items available for purchase. Each row shows the item name, price, and a button to select it.
- 3.** Click "Select item" to add it to your order. The button will update to show the item is selected.
- 4. Order summary:** Once you select an item, your order summary appears here showing the total charge and a breakdown by payment method.
- 5. Choose your payment method:** Pick how you want to pay. You can use a Credit Card, eCheck (bank transfer), or enroll in a Payment Plan.
- 6.** Review the fee details for each payment method here so there are no surprises.

Payment plan

Item name	Price	Actions
Full Week for Full Year	\$150.00	+ Select item
Full Week for Semester	\$300.00	✓ Selected item
Total Charge: \$300.00 Credit card \$312.00 eCheck \$306.25		

Payments Select your method of payment.

[Credit Card](#) [eCheck](#) [Payment plans](#)

1. **Select payment plan button in Purchase page :** Select this option (if available on your school) will bring you to the options for the payment plans.

Payment plan Pay your spendings in installments/payments.

Student: Bruce Banner **1**

Enrollment info **2**

Item: Full Week for Semester **Amount:** \$300.00 **Purchase type:** purchase

3 Service Charges

The Credit Card convenience charge is 4.00% (minimum \$1.00). There is a \$40 charge for a credit-card chargeback. For each deposit by check, there is a service charge of \$0.75 plus 1% of the total deposited.

1. **Select an account:** This is the student selected for the payment plan to enroll
2. Details of what and how the payment plan will be.
3. This section explains any service charges that may apply to your payment plan.

Select payment plan

Plan split:

3 Split(s) ▼

Payment type:

eCheck ▼

eCheck account

Add a new bank account

Payment Schedule

Split	Date	Installment	Service fee	Total
1	04/06/26	\$100.00	\$1.75	\$101.75
2	02/08/26	\$100.00	\$1.75	\$101.75
3	12/14/25	\$100.00	\$1.75	\$101.75

Enroll payment plan

1. **Select payment plan:** Choose the number of installment splits and your payment type to build your payment plan.
2. Your linked bank account is shown here. If you haven't set up a banking account, you can add a new one here.
3. **Payment plan details:** This table shows each installment date, amount, service fee, split number, and total so you know exactly what to expect each month.

Payment plan details

Student Name - ID: Han Solo - 2

Hide ▼

Full Week for Full Year

Active

Total amount:

\$150.00

Monthly Installment

\$12.50

Remaining balance

\$137.50

Next Payment:

Aug 26, 2025

Amount paid:

\$12.50

Last Payment:

Jul 28, 2025

Plan duration 12 months Started on July 2025

Full Week for Full Year

Active

Total amount:

\$150.00

Monthly Installment

\$12.50

Remaining balance

\$137.50

Next Payment:

Aug 23, 2025

Amount paid:

\$12.50

Last Payment:

Jul 25, 2025

Plan duration 12 months Started on July 2025

Plan details

Item	Total Amont	Remaining Balance	Monthly Installments	Next Payment	Last Payment	Splits
Full Week for Full Year	\$150.00	\$137.50	\$12.50	Aug 26, 2025	Jul 28, 2025	Active
Full Week for Full Year	\$150.00	\$137.50	\$12.50	Aug 23, 2025	Jul 25, 2025	Active

Order meals

Order meals Here you plan and order meals for the spending accounts.

Funds in your account: \$59,997.17 1 → FUND ACCOUNT Albina Amon - 30711

Your choices total \$38.19 2 Your current balance covers the meal selections, no additional funding is required at this time

1. View the menu available

*Menus are viewable below on the "Menu PDF". *Ordering is available up to 8 weeks in advance.

3 [SEE MENU](#)

Please make your selections before 5pm each Friday

Write a note to inform something when ordered (optional)

Enter any special instructions or notes here... 4

2. Select the orders and days on the calendar

3. → View Current Selection 6

2026 April

Monday Apr 20, 2026	Tuesday Apr 21, 2026	Wednesday Apr 22, 2026	Thursday Apr 23, 2026	Friday Apr 24, 2026
Select Main April 20	Select Main April 21	Select Main April 22	Select Main April 23	Select Main April 24
Select Drink	Select Drink	Select Drink	Value Deli Sandwich \$3.95	vanilla frappuccino \$2.50
Select Dessert	Select Dessert	Select Dessert	Select Dessert	Select Dessert
☐ Yogurt Cup ☐ Whole Fruit	☐ Yogurt Cup ☐ Whole Fruit	☐ Yogurt Cup ☐ Whole Fruit	☐ Yogurt Cup ☐ Whole Fruit	☐ Yogurt Cup ☐ Whole Fruit

- 1. Selected account bar:** This shows the funds available on the currently selected spending account. Use "→ Fund account" to add money, or use the drop-down on the right to switch to a different student.
- 2. Your choices total & balance coverage:** As you pick meals on the calendar, this row updates live with the running total of your selections and tells you whether the current balance covers what you've chosen
- 3. View the menu available:** Click "See menu" to open the school's menu (usually a PDF) in a new tab so you know what each option includes before you order.
- 4. Write a note (optional):** If the school allows it, use this text area to leave special instructions for the cafeteria (allergies, portion notes, etc.). This note is attached to the whole order.
- 5. Meal calendar:** Pick the year and month at the top, then use each day card to choose meals.
- 6. View Current Selection:** When you're done choosing, click this button (it also floats at the bottom of the screen as you scroll) to submit your selections and go to the confirmation screen.

Order meals

Order for: Albina Amon		
Item name	Date	Status
BREAKFAST	2026-04-23	Approved
Cheeseburger	2026-04-23	Approved
Hot Dog	2026-04-23	Approved
BREAKFAST	2026-04-29	Order placed
American Meal	2026-04-29	Order placed
Cheeseburger	2026-04-29	Order placed
Soup	2026-04-30	Order placed
Salad	2026-04-30	Order placed

- 1. Order details bar:** Shows the student the order was placed for, so you have a quick reference of who it was processed for.
- 2. Order items table:** Each row is one meal or item from your selection, listing the item name, the serving date, and its current status. If there are no items to show (for example, an empty submission), an informational row appears in place of the list.
- 3. Legend of statuses:** Explains what each status badge means. "Order placed" means your order has been received and is waiting for approval by the school, while "Approved" means the school has reviewed and processed the order.

User settings - Profile

User settings Change and edit all the settings your account have.

Personal information

1

Update your name and phone number

First name

Last name

Phone number

Address information

2

Update your mailing address

Street address

City

State

Zip code

3

If you need assistance, contact us: **(617) 868-0060** or toll-free at **(855) 302-0070**. You can also email us at SUPPORT@MYSPENDING.INFO.

- 1. Personal information:** Update your first name, last name, and phone number. Click “Update” under the card, a confirmation modal will summarise your changes before you save so you can double-check before committing.
- 2. Address information:** Update the street address, city, state, and zip code on file. Note: this address is used only for deposit verification and is not shared with your organization, so if you move you should notify the school separately.
- 3. Need help?** The footer at the bottom of the page lists our support phone numbers and email so you can reach us if anything looks wrong or you aren’t sure what to enter.

User settings - Change password and email

User settings Change and edit all the settings your account have.

Change password

Set a new password so you can log in again safely.

Click the button below and we'll send a password reset link to your registered email address. The link expires in 60 minutes.

Send reset link

1

- 1. Send reset link:** Click the button to email a secure password reset link to the address on file. You do not type a new password here — the link 3 in the email is where you set the new one.
- 2. Link expiry:** The reset link expires 60 minutes after it is sent. If you don't use it in time, just come back to this page and request a new one.
- 3. Reset link sent confirmation:** After a successful send, the page updates to show the masked email address the link was sent to, with a reminder to check your inbox (and spam folder). You can return to the homepage from here.

User settings Change and edit all the settings your account have.

Change email address

Enter your new email address. We'll use this for future login and account updates

New email address

1

you@example.com

Verify email address

2

you@example.com

Change

3

- 1. New email address:** Type the email address you want to use going forward. After the change, this is the address you will use as your username when logging in, and it's where all your account emails will be sent.
- 2. Verify email address:** Re-type the same email address to confirm there are no typos. Both fields must match before the change is accepted.
- 3. Change:** Click this button to save the update. If there is any problem (for example, the email is already in use), an error message appears at the top of the card explaining what needs to be fixed.

User settings - Statements

Request a statement

To request a statement, check "Request copy of statement" and then click Submit. Statements are typically sent as an automated process overnight, so please allow up to 24 hours for your request to be processed.

To allow for statements sent whenever the account balance drops below a specific point, check "Enable Statement Delivery" and enter the desired threshold in the box.

☐ **Enable Statement Delivery** 1

Check this box if you would like to request a statement starting on a particular date. (Statement delivery must be enabled.)

Choose your starting date in the calendar below, using the arrows to navigate back to previous months, and click Submit at the bottom of this page. Please note that requested statements are generated nightly.

☒ **Request copy of statement.** 2

At what balance would you like to receive a statement?
Please enter the number here. (For example, 25 is our default.)

25.00 3

Please select the start date for the statement

04/01/2026 4

Update

- 1. Enable Statement Delivery:** Tick this box to have statements emailed to you automatically. Statements are generated nightly, so allow up to 24 hours after enabling.
- 2. Request copy of statement:** Tick this box if you want a statement starting on a specific date (Statement Delivery must be enabled first). Use the start date field below to pick when the statement should begin.
- 3. Balance amount (threshold):** Enter the balance that should trigger an automatic statement — for example, 25 is our default. When the account drops below this amount, a statement will be emailed.
- 4. Start date & Update:** Pick the starting date for the statement in the calendar field, then click "Update" at the bottom of the page to save your preferences or submit the request.

Contact us

Contact us

Which is the reason you are contacting us? **1**

☐ Login issues ☐ A purchase on the account ☐ A balance transfer ☐ Refund of a recent deposit ☒ Other

First name **2**

John Doe

Location

Springfield

Phone number

212-456-7890 (example)

Email

you@example.com

Please describe your issues briefly **3**

4 Send

5 If you need assistance, contact us: (617) 868-0060 or toll-free at (855) 302-0070. You can also email us at SUPPORT@MYSPENDING.INFO.

- 1. Reason for contact:** Choose the option that best matches your question, Login issues, a purchase on the account, a balance transfer, a refund of a recent deposit, or Other. This helps us route your message to the right team.
- 2. Your details:** Enter your first name, your location (city or organization), your phone number, and your email so we can get back to you.
- 3. Message:** Use the large message field to describe your issue in detail. The more context you share - what you were doing, what you expected, and what went wrong - the faster we can help.
- 4. Send:** Click the “Send” button to submit your message. Our support team will follow up using the contact details you provided.
- 5. Direct support:** If you prefer to reach us right away, the footer at the bottom of the page lists our phone numbers, (617) 868-0060 or toll-free (855) 302-0070, and our email support@mykidsspending.com.