Payments Migration Checklist

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This checklist was created to guide the transition from Vanco to Payrix. For instructions on moving from Payrix to Stripe, please refer to the **District Migration Checklist**.

Infinite Campus is changing payment platforms. As soon as the underwriting is complete, and you have updated your Campus version to at least Campus.2120 (GA May 10, 2021) you can begin the migration process.

The following checklist provides the steps you must complete to migrate to the new payment platform.

Questions about migrating? Please contact your Client Relationship Manager.

Before You Begin: You MUST have your **full** bank account number(s) and routing number.You MUST be using Campus.2120 (GA May 10, 2021) or later to migrate; however, we recommend using the most recent version of Campus.

Migration Checklist

Done	Task	Description
☐	1	Complete this survey from Infinite Campus (if you have not completed it already).
☐	2	Complete the Merchant Signup form. See one of the following articles for more information: • Public Schools - Merchant Signup Public • Private Schools - Merchant Signup Private You will receive updates through a support case. If you have any questions about the Merchant Signup, please contact Campus Sales or your Client Relationship Manager.

Done	Task	Description
☐	3	If any of your district's bank accounts are configured to disallow funds from being withdrawn, please contact your bank to allow for money to be both deposited *and* debited from your accounts. Your bank may request a unique identifier (referred to as a Funding ID or Company/Customer ID) from Payrix to allow for funds to be debited. If so, please share the following IDs with your bank: • **WFMPAYRIX1** (credits) • **WFMPAYRIX3** (debits) • **1263355235** (eCheck debit) • **2263355235** (eCheck credit) Please note that after beginning to process payments following the migration, if your district's first deposit is a negative dollar amount (seen within System Administration > Payments > Deposit Reporter), that negative deposit must first complete before any subsequent deposits can complete. Negative deposits take about 5 business days to complete.
☐	4	Print the Recurring Payments Report.
☐	5	Export all current information available on the Payments Reporter tool. **Note**: This information should not change during the migration. It is a best practice to have this information available.
☐	6	Turn off Online Payments. We expect the actual migration process to take minutes once you get started. **Note**: Only a district administrator with tool rights to All Years and All Schools can toggle Online Payments on and off.
☐	7	Print a list of all bank accounts currently set up in Campus (System Administration > Payments Setup > Bank Accounts). All active bank accounts on the report will be migrated. If there is a bank that you do not want to migrate to the new payment platform, inactivate the bank account.
☐	8	Copy and paste your Merchant ID from your Campus support case. You will need your Merchant ID to complete the next step.

Done	Task	Description
☐	9	[Migrate your banks to the new payment platform](#). (System Settings > Payments > Payments Setup > Vendor Information > Migrate) You will need the full bank account number for each bank account you are migrating. If you cannot edit a bank account in the migration tool, that means your district already created the bank account during the onboarding process. If a bank account is missing or something is wrong with a bank account, this indicates there is conflicting information between Vanco and Campus. **The conflict must be corrected before you can migrate your bank accounts.** Complete the following steps to correct the conflict. 1. Create the correct bank in Campus: System Administration > Payments Setup > Bank Accounts > NEW. ○ Select the correct bank from Vanco in the **Vendor Bank Account** dropdown list. 2. Edit all Fund Accounts that are assigned to the wrong bank and reassign them to the new bank account. 3. Inactivate the incorrect bank account.
☐	10	During the migration (step 8), Campus creates two Fund Accounts: **FEE** and **Transaction Fee**. The new Fund Accounts are assigned to the same bank account that is assigned to the district's Default Fund Account. Verify the bank account assigned to these Fund Accounts and change the bank account if necessary. Be sure to select "All Schools" before editing these Fund Accounts.
☐	11	[Turn on online payments](#).
☐	12	Notify all Campus Parent and Campus Student portal users as well as Employee Self Service users that payment methods must be added again and that all recurring payments must have a new payment method assigned. For security reasons, all users will have to enter their payment information and set up recurring payments. This is a one-time setup, and there is no cost associated with setting up payment methods going forward.