District Migration Checklist - (New)

Last Modified on 06/26/2025 12:44 pm CDT

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

🛑 Before You Begin

You must ensure you can see the "Request Stripe Merchant Account" button within Payments Setup > Vendor Information. If this button does not display, please contact your Client Relationship Manager.

You MUST have your **full** bank account number(s) and routing number.

Make sure you have your new M2 Bluetooth devices before starting any of the processes. Infinite Campus will replace the devices for free based on survey responses.

You MUST be using Campus.2515 (GA April 7, 2025) or later to migrate; however, we recommend using the most recent version of Campus to ensure all fixes identified through the beta testing process have been resolved..

Migration Checklist

Done	Task	Description
☐	1	Complete this survey from Infinite Campus (if you have not completed it already).
☐	2	If any of your district's bank accounts are configured to disallow funds from being withdrawn, please contact your bank to allow for money to be both deposit and debited from your accounts. Your bank may request a unique identifier (referred to as a Funding ID or Company/Customer ID) from Stripe to allow for funds to be debited. If so, please share the following IDs with your bank: • **1800948598** • **4270465600** **Note:** 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 be completed before any subsequent deposits can be completed. Negative deposits take about 5 business days to complete.

Done	Task	Description
☐	3	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.
☐	4	Request a Stripe Merchant Account (System Settings > Payments > Payments Setup > Vendor Information > Request Stripe Merchant Account). For full instructions, see Stripe Onboarding – Private Entity or Stripe Onboarding – Public Entity.
☐	5	Complete onboarding with Stripe (System Settings > Payments > Payments Setup > Vendor Information > Request Stripe Merchant Account). For full instructions, see Stripe Onboarding - Private Entity or Stripe Onboarding - Public Entity. **Note:** Onboarding is embedded within Campus and will include information about the business/School District, personal details for someone authorized to sign on behalf of the district, public details, and the primary district bank account will need to be added.
☐	6	Print the Recurring Payments Report.
☐	7	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.
☐	8	Print a list of all bank accounts currently set up in Campus (System Settings > Payments > Payments Setup > Bank Accounts). To maintain records of inactive accounts, print your account list before migration, as these accounts will not be visible after migration. • 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. • If you have a bank account with an INVALID label, this must be addressed before migration.
☐	9	Print a list of all fund accounts. **Note**: This information should not change during the migration. It is a best practice to have this information available.

Done	Task	Description
☐	10	Turn off Online Payments. We expect the actual migration process to take minutes once you get started. (System Settings > Payments > Payments Setup) **Note**: Only a district administrator with tool rights to All Years and All Schools can toggle Online Payments on and off.
☐	11	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 • A file validating each bank account: Voided Check, Bank Letter or Bank Statement from the last 60 days. ○ Document must include the District's Name, full account number, full routing number, not expired, clear and large enough to read, uploaded in full color/no black and white scans, complete and not cropped. ○ Max File Size: 8 MB. ○ Accepted document type: .jpeg, .png, .pdf. • If you cannot edit a bank account within the migration page, 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 Payrix and Campus. **The conflict must be corrected before you can migrate your bank accounts.** • A Campus Support ticket must be opened to look into the issue.
☐	12	Turn on Online Payments.

Questions? Please contact your Client Relationship Manager.