

Migrate Banks to New Payment Platform (Payments Migration) - New

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Tool Search: Payment Setup

Infinite Campus is transitioning to a new payment vendor. This article outlines the steps needed to transfer your bank accounts from the current payment vendor to the new one.

You will need the full bank account number and additional documentation for each bank account you are migrating. The types of documents you will need are:

- 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 in the Payments Setup tool, that means your district already created the bank account during the onboarding process.

What to Expect After Migrating to the New Payment Platform

For a few weeks, you may see updates to transactions processed through the old payment platform and updates for transactions processed through the new payment platform in the [Payments Reporter](#). The Payment Reference Number for transactions from the new payment platform begins with **pi_3**. To exclude old payment platform transactions and only see transactions from the new payment platform, use **pi_3** in the *Payment Reference Number* column to filter results in the Payments Reporter.

Step 1: Updating Vendor Information

Path: System Settings > Payments > Payment Setup > Vendor Information

Complete one of the onboarding processes, depending on private or public:

- [Stripe Onboarding - Private Entity](#)
- [Stripe Onboarding - Public Entity](#)

Step 2: Verifying Bank Accounts

Path: System Settings > Payments > Payment Setup > Bank Accounts

Before you begin, click **Print All** to print a list of all bank accounts currently set up in Campus.

- Use this list to verify the bank name, routing number, and the last four digits of the bank accounts set up in Campus.
- 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, deactivate the bank account.

CAUTION

Once a Bank Account is made inactive, it cannot be made active again. When you deactivate a Bank Account, Campus also deactivates all Fund Accounts associated with the Bank Account.

Step 3: Migrate Banks

Path: System Administration > Payments > Payment Setup > Vendor Information

All active bank accounts display on the Preview Migrating Banks panel. You may notice a different number of bank accounts compared to your bank account list because Campus is only validating bank accounts and not bank account IDs.

If you see a bank account that you do not want to migrate, please cancel and deactivate the bank account before you complete the migration process. If you can't edit a bank account, this means your district already created this bank account during the onboarding process with the new payment vendor. The names of the banks that are already set up with the current payment vendor appear along with their routing number and the last four digits of the account number.

Once the bank account migration process is complete, it cannot be undone.

Migration

Bank Migration

All active bank accounts display on this panel. You may notice a different number of bank accounts compared to your bank account list because Campus is only validating bank accounts and not bank account nicknames.

If you see a bank account that you do not want to migrate, please cancel and inactivate the bank account before you complete the migration process.

If the Bank Account Number field displays an entry field, this field is required and must be completed to proceed. If the File Upload field displays a "Select files..." button, a file must be uploaded to proceed.

Once the bank account migration process is complete, it cannot be undone.

BANK NAME	ROUTING NUMBER	BANK ACCOUNT LAST 4	BANK ACCOUNT NUMBER	FILE UPLOAD	STATUS
Credit Union	110000000	*8883	000888888883	Select File	
Credit Union	091000019	*6789	000123456789	Select File	

Accept: (Required)

By clicking accept, you authorize Infinite Campus, Inc. to debit the bank account(s) specified for any amount owed for charges arising from your use of Infinite Campus Online Payments. You may cancel this authorization at any time, with 30 days advance notice, by contacting Infinite Campus, Inc.

Complete Migration

Close

Example Preview Bank Migration Screen

1. Click **Migrate**.
2. Enter the complete bank account number in the Bank Account Number field.

If you can't edit a bank account, this means your district already created this bank account during the onboarding process.

3. Click Select File and select one of the appropriate files:
 - 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.
4. Correct any Invalid Account errors by using the process from **Step 2**. You must correct all errors and enter all Bank Account Numbers before you can continue.
5. Click **Complete Migration**.
6. Click **Continue**.

Result

Campus migrates your banks to the new payment platform. Fund Accounts will continue to be linked to the previously established bank accounts. If necessary, users can modify which bank account is associated with any fund. Be sure to select "All Schools" before editing these Fund Accounts.

Campus validates bank accounts after the first deposit is made to it. If a bank account is invalid, a message appears in the Process Alerts (provided you have rights to the bank accounts and All Schools) and it will be labeled accordingly.

Correcting Bank Account Conflicts

If there are any Bank Accounts shown, there is an issue that needs to be resolved before migration can occur. If you see a bank account that you do not want to migrate, please cancel and deactivate the bank account before you complete the migration process.

If information in Campus does not match the existing vendor, you will see a mismatched label. Please contact Campus Support to resolve these issues.

If the label is invalid, there is an error with the routing and /or account number for that bank account, and information must be entered to verify the account.

Please select cancel, navigate to the Bank Accounts section, and update account information. Once these issues are resolved, you can return to Complete Migration.
