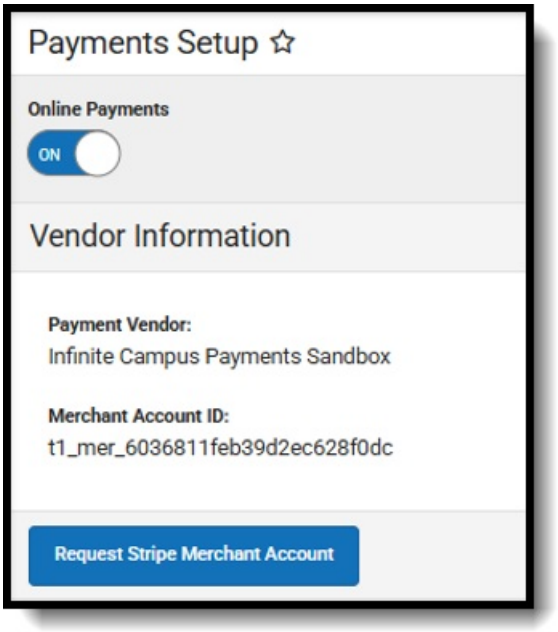
Stripe Onboarding - Public Entity

Last Modified on 07/07/2026 10:04 am CDT

The following information is for existing Campus Payments customers **ONLY**. If you are not currently a Campus Payments customer, please contact Sales or your Client Relationship Manager. The new process to complete the transition to the new payment platform is fully completed within System Settings > Payments > Payments Setup > Vendor Information.

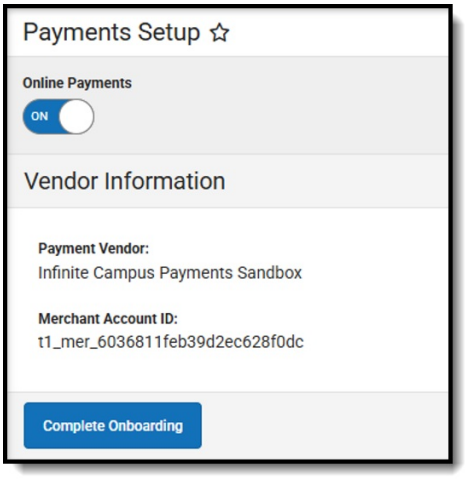
Request Stripe Merchant Account

Once the business type is confirmed, the appropriate Stripe account is requested, and the Request Stripe Merchant Account button appears in Vendor Information. To display the button, ensure that All Schools is selected in the toolbar.



Complete Onboarding

Once the Stripe Merchant Account has been requested, select the "Complete Onboarding" button to start the onboarding process.

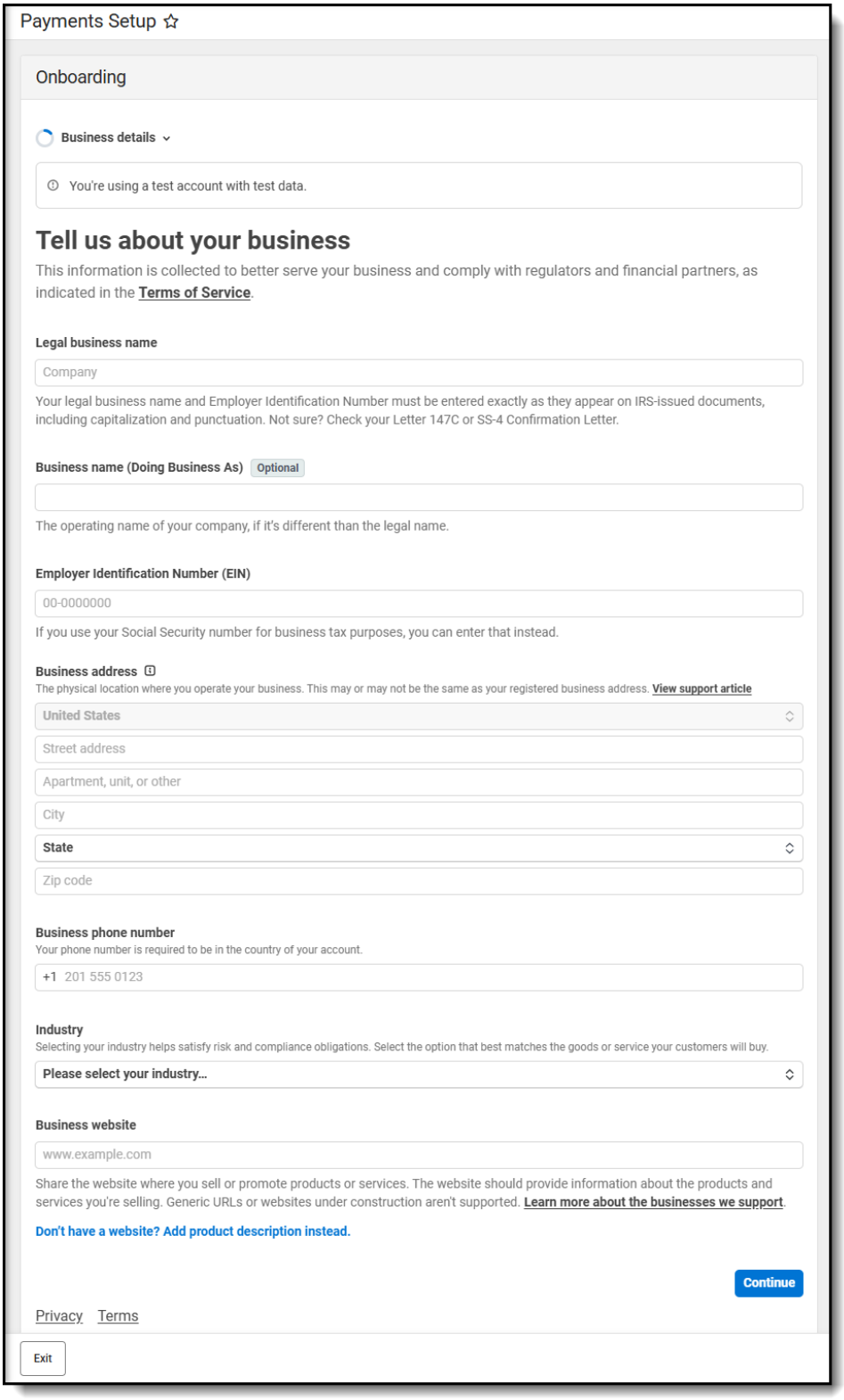


Onboarding is comprised of three sections:

- Business Details
- Business Representative
- Authorizer

Business Details

This screen is used to capture information about your school district. Use the following field descriptions to complete the fields on this screen. Fields and verbiage within this section are subject to change based on changing requirements from our payment vendor. Print the page if you want to retain a copy for your records, then click **Continue** when you are done.



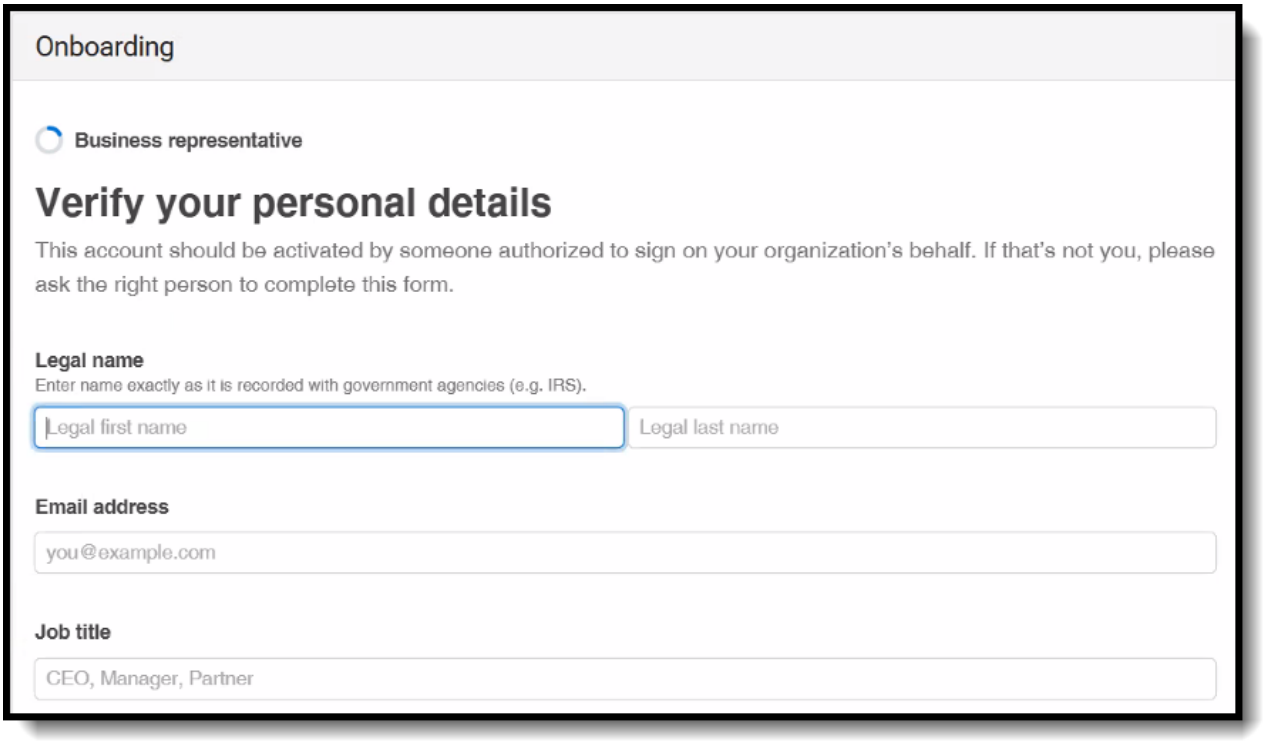
#	Field	Description
1	Legal Business Name	This is the full legal name of he school district as registered with the IRS. Your legal business name must be entered exactly as it appears on IRS-issued documents, including capitalization and punctuation. Not sure? Check your Letter 147C or SS-4 Confirmation Letter.

2	Business Name (Doing Business As)	The operating name of your company, if it's different than the legal name (Optional)
3	Employer Identification Number (EIN)	The district's 9 digit business identification code as issued by the IRS. If If you use your Social Security number for business tax purposes, you can enter that instead. If you are uncertain about this Tax ID guidelines are best for your organization there is a link to a support article within onboarding.
4	Business Address	The physical location where you operate your business. This may or may not be the same as your registered business address.
5	Business Phone Number	The daytime phone number for the district's business contact. This phone number is required to be in the county of your account.
6	Business Website	The address for the school district's website.

Business Representative

This account should be activated by someone authorized to sign on your organization's behalf. If that's not you, please ask the right person to complete this form.

> The business representative must be someone managing the Stripe account for the district and may receive communication regarding the account.

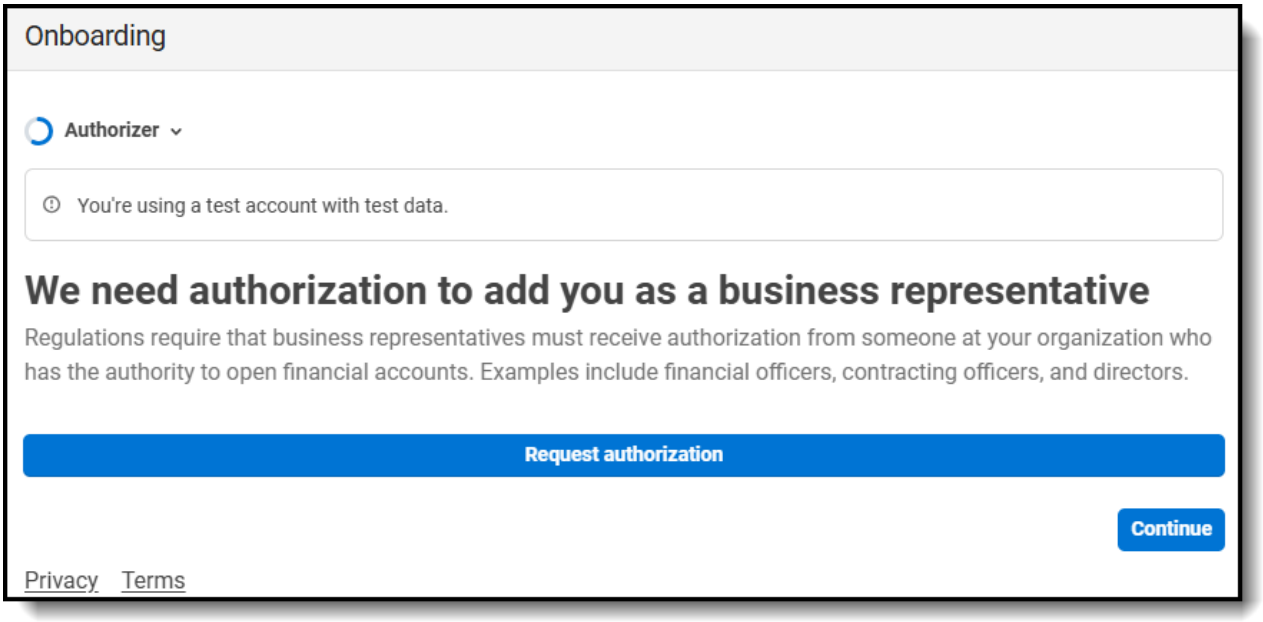


#	Field	Description
1	Legal First Name	The business contact's first name. Enter name exactly as it is recorded with government agencies (e.g. IRS).
2	Legal Last Name	The business contact's last name. Enter name exactly as it is recorded with government agencies (e.g. IRS).
3	Email Address	The business contact's email address.
4	Job Title	The business contact's job title.

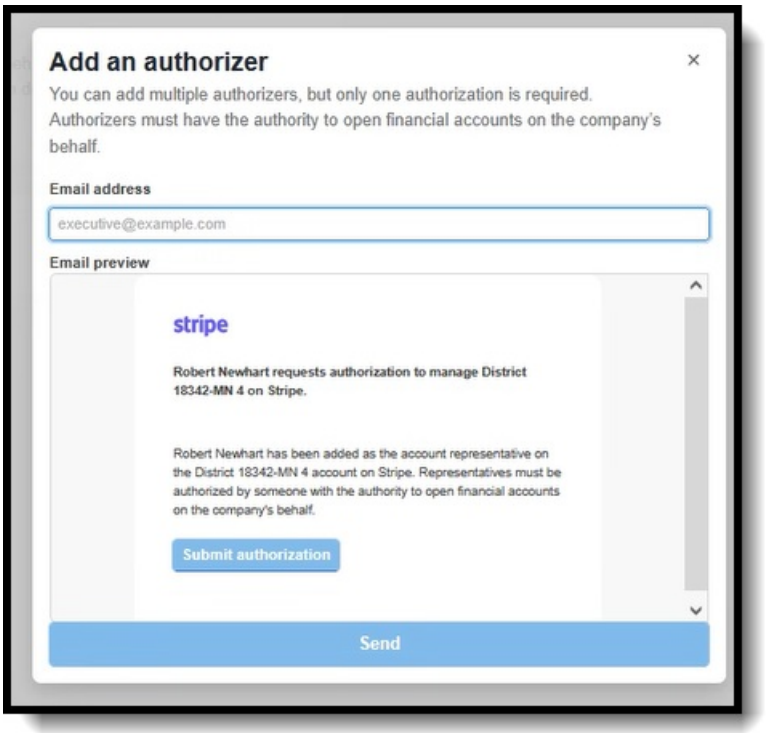
Authorizer

The Authorizer approves the Business Representative to act on behalf of the organization regarding their Stripe account. Business representatives must be authorized to open financial accounts on behalf of your entity. Examples include financial officers, contracting officers, and directors. If your authority has been delegated to you by someone else, you can identify an authorizer to confirm your authority. You can add multiple authorizers, but only one authorization is required. Authorizers must have the authority to open financial accounts on your organization's behalf.

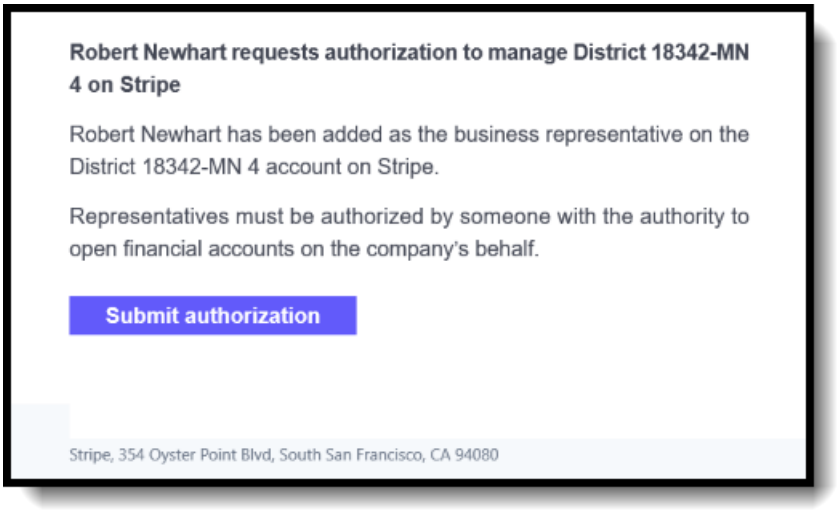
Users must select the "Request authorization" button in the center of the screen to proceed with onboarding.



Once selected, the email address of the authorizer must be entered. An email preview will be shown and once Send is selected, an email will be sent from "notifications@stripe.com" to the authorizer.



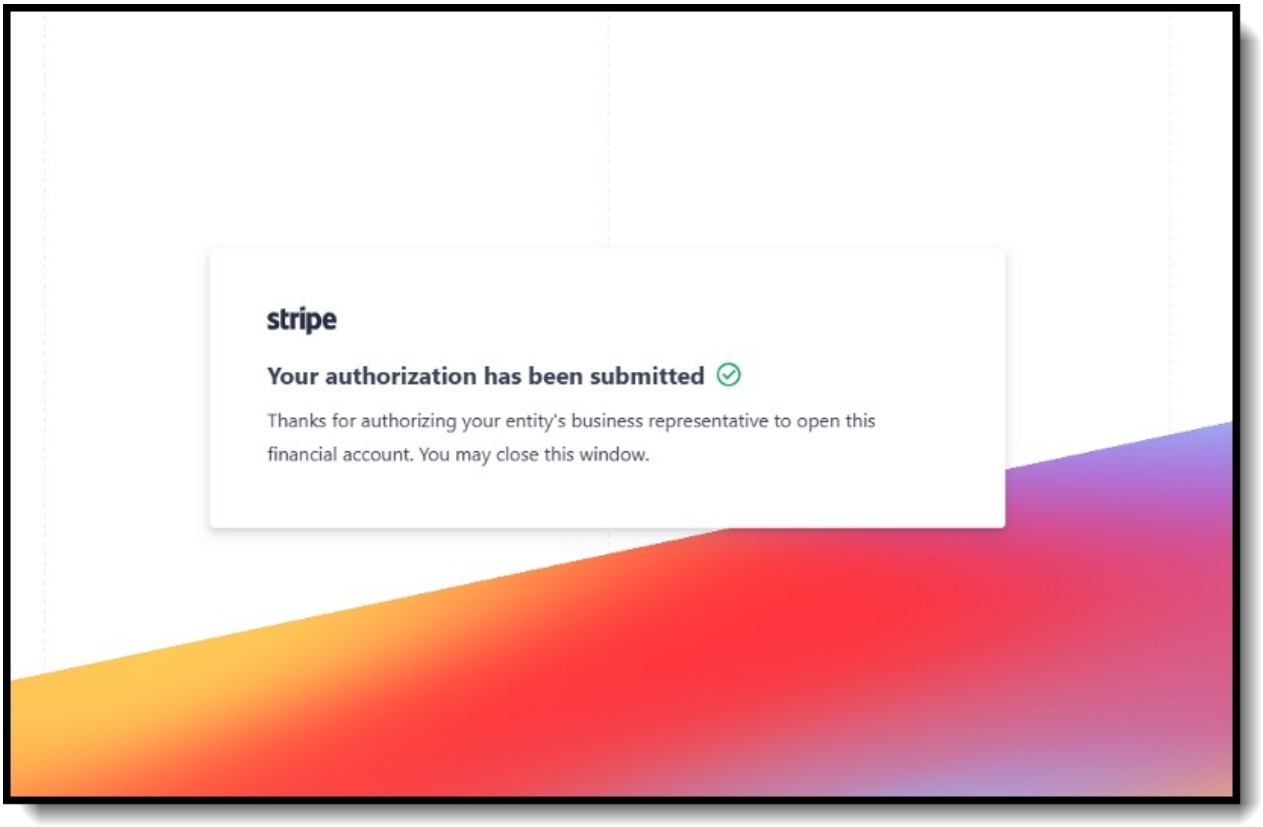
The authorizer will then receive an email where they will select a button to submit authorization.



When the user selects the button they will be brought to a webpage where they will enter their legal name and title.



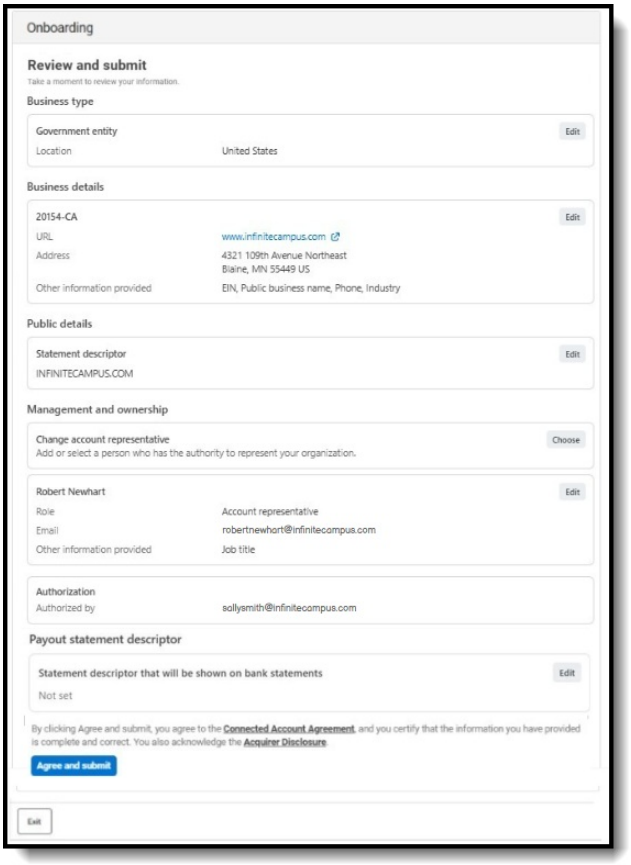
Once submitted, they will receive the following confirmation page:



The Business Representative will receive a confirmation once the Authorizer has submitted the form. No action is required from the email, and it can be deleted.

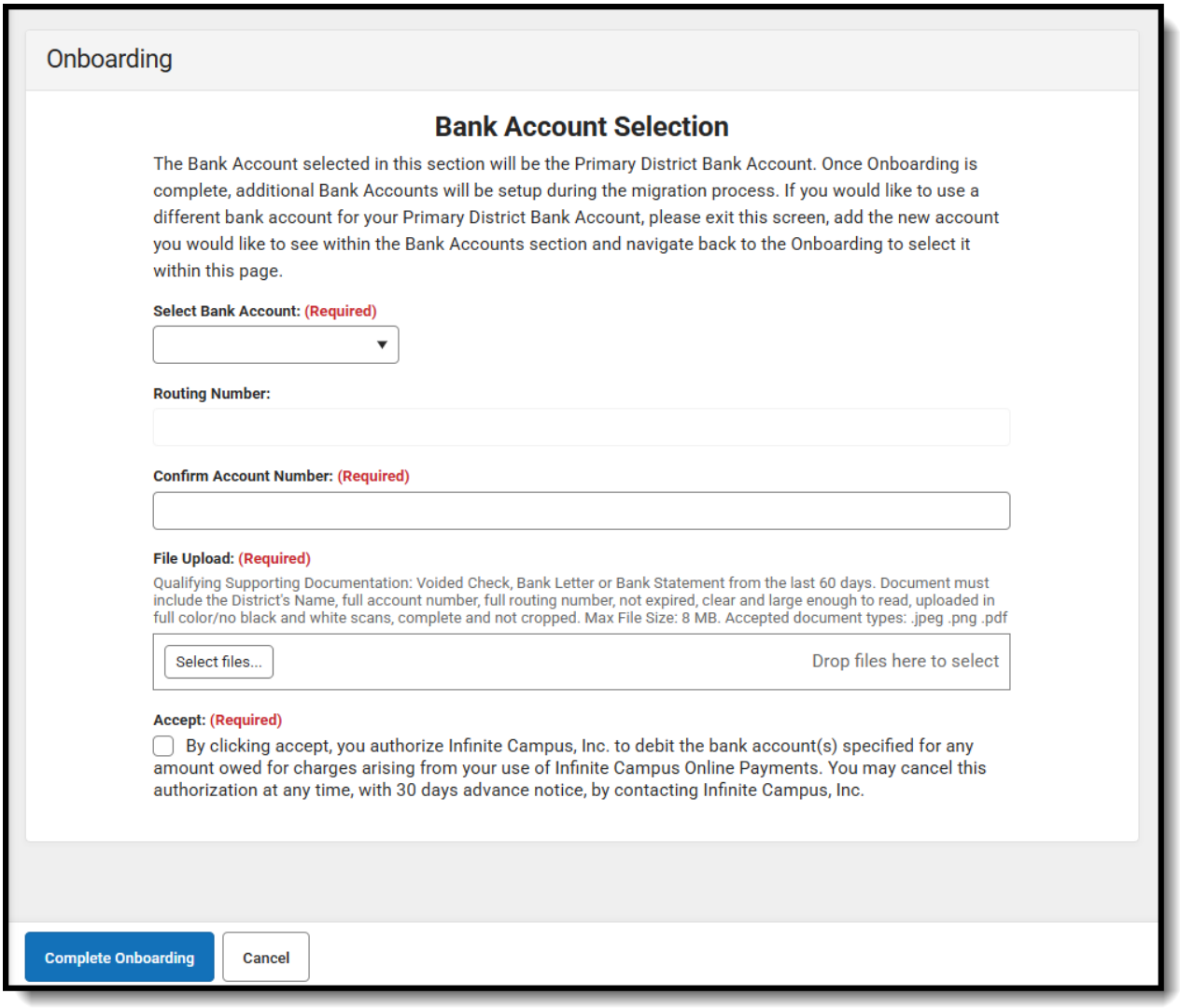
Once the authorization and all other sections have been completed, information entered as well as the connected account agreement and acquirer disclosure have been reviewed, the Agree and submit button must be selected.

To help prevent disputes, review and update the Public Descriptor in the Public Details section before clicking 'Agree and submit' during Onboarding. The Public Descriptor appears on customer bank or card statements, and updating it can reduce confusion and potential disputes. You can also update this information later in Vendor Management if needed.



Bank Account Selection

The final step of Onboarding is designating the Primary District Bank Account.



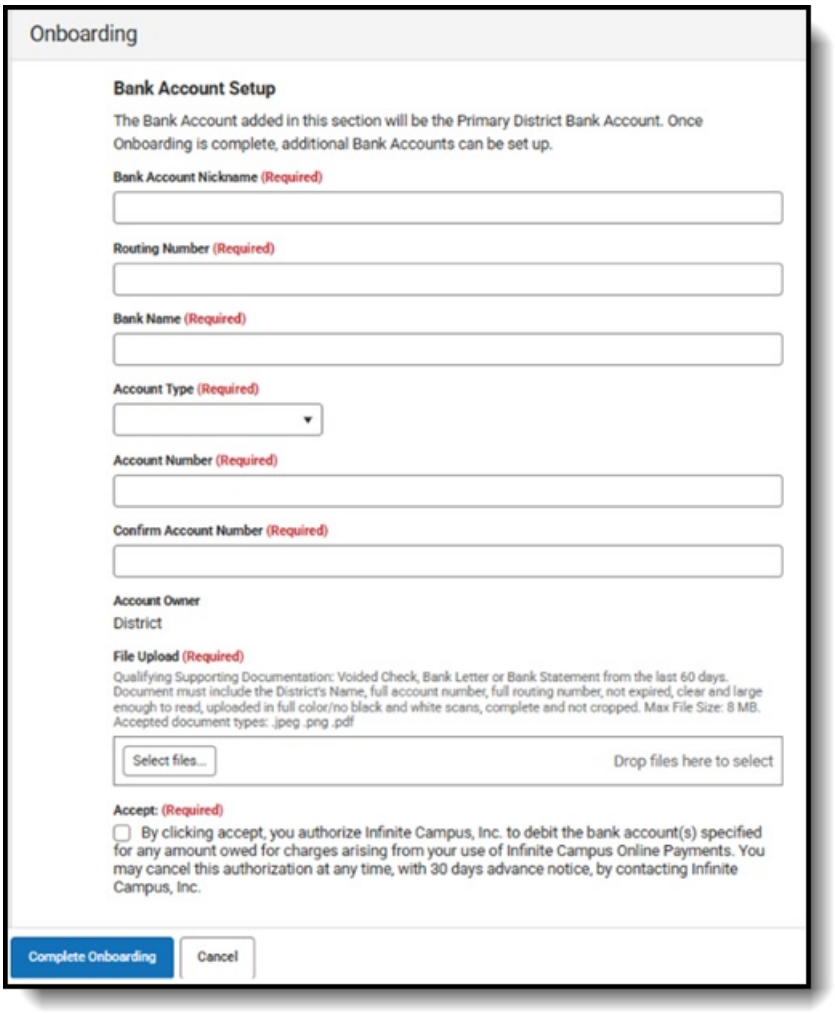
#	Type	Description
1	Select Bank Account	All district owned bank accounts will display. The bank account that should be the Primary District Bank Account for Stripe should be selected.
2	Routing Number	The full Routing Number of the Primary Bank selected will populate, read only.
3	Confirm Account Number	The full Account Number of the Primary Bank selected must be entered.
4	File Upload	Qualifying Supporting Documentation must be uploaded: 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: 8MB. Accepted document types: .jpeg .png .pdf

Once all required information has been added, the Complete Onboarding button should be

selected. The next step is to Migrate Banks to New Payment Platform.

Bank Account Setup

However, if you are from a new onboarding district or a migrating district that is on an earlier version of Campus than .2523, you will see the Bank Account Setup form and be required to enter all the bank account information:



#	Type	Description
1	Bank Account Nickname	All district owned bank accounts will display. The bank account that should be the Primary District Bank Account for Stripe should be selected.
2	Routing Number	The full Routing Number of the Primary Bank selected must be entered.
3	Bank Name	The Bank Name must be entered.
4	Account Number	The full Account Number of the Primary Bank account must be entered.

5	Confirm Account Number	The full Account Number of the Primary Bank selected must be entered.
6	File Upload	Qualifying Supporting Documentation must be uploaded: 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: 8MB. Accepted document types: .jpeg .png .pdf

The new account that is entered during onboarding will create a duplicate record if a current bank account is being used as the default, and it cannot have the same name as any Bank Account ID on file. We recommend naming the new account Stripe Primary District Account or Primary District Account. Do not tie fund accounts to this account unless it is a new account, as fund account attachments do not change with migration. Inactivating an existing bank account ID with outstanding payments will render those payments unable to be deposited.