

How To: Making a TheoPay Purchase



SHOP

1.

Shop on an approved online retailer and add the eligible items you want to your cart. Please consider the decision criteria for more questions about qualifying expenses. If you purchase items that are not eligible expenses, you may be audited for repayment.

2.

OPEN THEOPAY AND SCAN

Open the TheoPay extension while your cart is on screen. TheoPay scans your cart and checks each item.

- The scan may need to be done on either the cart page or the checkout page. The scan needs to be on a page where the items from your cart are displayed.

3.

REVIEW THE RESULTS (SEE BELOW)

All items must be eligible to continue with TheoPay Self-Serve. If you enter a justification for an ineligible item, your order will automatically convert to TheoPay Fulfillment

WHAT DO THE RESULTS MEAN?

Result	What it means
Eligible	The item looks like an approved expense and is cleared to purchase.
Ineligible	The item doesn't appear to qualify and can't be purchased with your funds. Remove it to continue.
Needs review / Pending	The item requires a review. If you apply a justification your order will be switched to TheoPay Fulfillment and will no longer be eligible for TheoPay Self-Serve.

4.

CONTINUE TO PAYMENT DETAILS

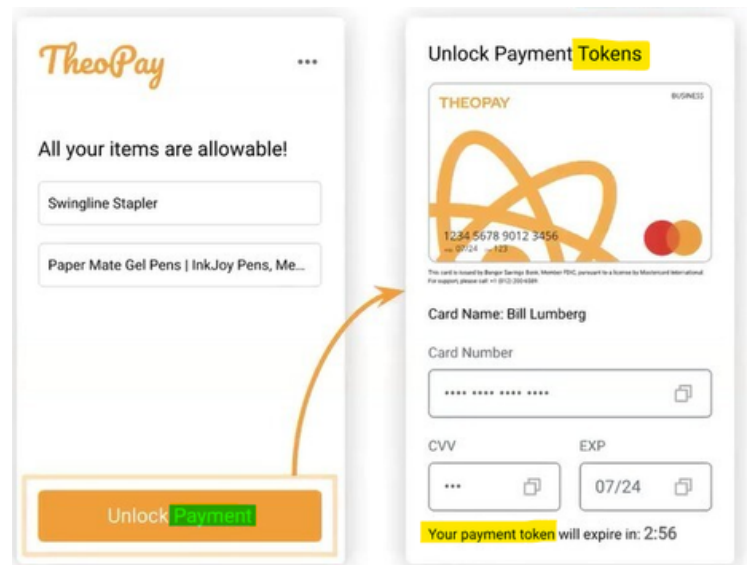
- If done scanning, go to the checkout page to copy/paste the card information shown under "Payment Token".
- Your one-time virtual debit card ("Payment Token") will have a card number, expiration, and security code. The card can only be used to purchase the cart that was scanned.
- See "Using your virtual card " just below.

USING YOUR VIRTUAL CARD

Once your cart is scanned and all items are approved, TheoPay shows you a one-time virtual debit card — a card number, an expiration date, and a security code (CVV). This is what pays for your order, straight from your student's account, so you're never paying out of pocket.

How to enter the card:

1. On the vendor's checkout page, go to the spot where you'd normally type in your own credit or debit card.
2. Copy the card number, expiration, and security code from TheoPay and paste them into those fields (typing them in exactly also works).
3. Finish checking out as usual.



One card = one purchase. Please review the following tips:

- The card TheoPay shows you belongs to that one scanned cart. Use it only for that purchase.
- Use the card that's on your screen for the cart you just scanned —don't mix up cards between purchases.
- The card can only be used for one purchase, trying to reuse the card will cause the original payment to fail. For future purchases, run a new scan and you'll get a fresh card for that cart.

After you check out — remove the card from saved payment methods:

- Stores like Amazon often offer to save your card for next time. After your order goes through, it's smart to delete the TheoPay card from your saved/stored payment methods.