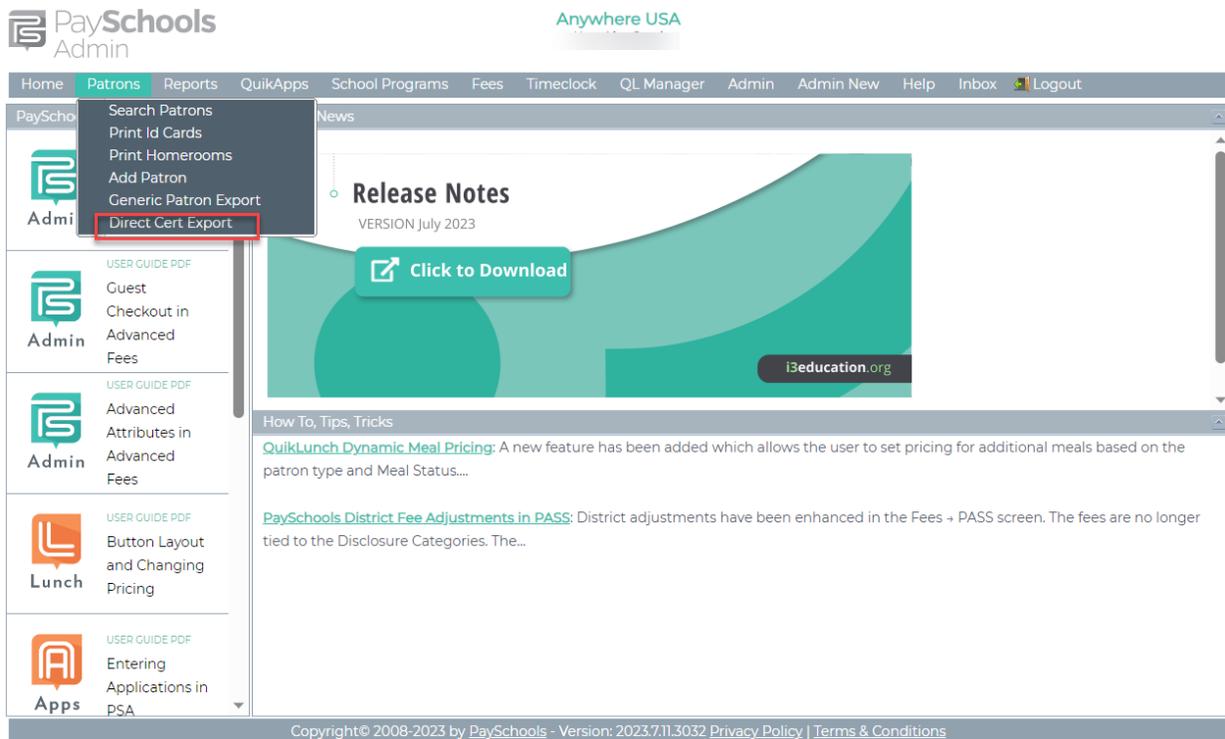


# Ohio Direct Certification

## Step 1

Select Patrons > Direct Cert Export



## Step 2

For larger districts be sure to change page size before checking the select all box. You must select all on all pages if you have more than 51 sites on the first page > once schools are selected click Export.

Select School(s): Clear filters

<input type="checkbox"/>	School Id	School Name
<input type="checkbox"/>	397	
<input type="checkbox"/>	487	
<input type="checkbox"/>	108	
<input type="checkbox"/>	120	
<input type="checkbox"/>	122	
<input type="checkbox"/>	405	
<input type="checkbox"/>	128	
<input type="checkbox"/>	140	
<input type="checkbox"/>	196	
<input type="checkbox"/>	425	

Page: 1 of 6 Go Page size: 10 Change 51

Export

### Step 3

Your file will be, by default, in your downloads folder and/or you can save file to desktop, which is recommended.

### Step 4

Log into CRRS. [Claims Reimbursement and Reporting System \(cnpus.com\)](http://cnpus.com)

- ✓ Once logged in, Select Application > Direct Certification/Verification
- ✓ Click link Direct Certification/Direct Verification

**Claims Reimbursement and Reporting System**  
**CRRS**



Returning Users: Log On

User ID:

Password:

Forgot Your Password?  
Forgot Your User ID?

Log On



Welcome to the  
Claims Reimbursement and Reporting  
System (CRRS)  
and  
Commodities Allocation Tracking  
System (CATS)

**Password Requirements**

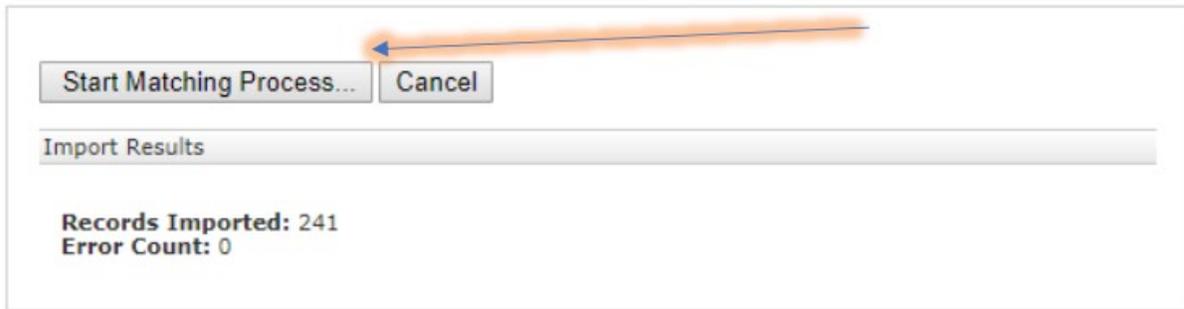
- A user's password MUST follow the following rules:
  - 8 to 12 characters in length
  - Must contain a numeric character
  - Must contain a special character (e.g., #, \$, &)
  - Must contain an uppercase letter
  - Must NOT be the same as the User ID

**Links**

- Training Management

### Step 5

Upload exported file from PSA > Upload the downloaded/saved file > click Start Matching Process



### Step 6

Once the process is complete > Download results by selecting excel

Matching Completed

#### Download Results:

- Excel
- Tab-Delimited

#### Processing Log

```
Processing 369 loaded records
.....
Processed 369 students with 0 matches in 0.194 seconds
```

## Step 7

The file downloads with **CNDC\_(todayDate).txt format**. (This name will vary on the date). **IMPORTANT- Save this to your files for record keeping.**

## Step 8

Back in PaySchools Admin > Select QuikApps > Direct Cert Import

- ✓ NEW drop down will allow type to be defined as Free or Reduced
  - This feature will be needed for the NEW ODDEX import
- ✓ Select FREE when using CRRS Legacy import
- ✓ Select Source as **'Defined in File'**
- ✓ Recommended to enter today's date into **'Import Note'**
- ✓ Select the radio buttons as shown
- ✓ Upload your file > Choose the exported file with the format CNDC\_(todaysDate).TXT

**PaySchools Admin**

Home Patrons Reports QuikApps Fees QL Manager Admin Admin New Help Inbox Logout

QuikApps

- Letters
- Application Review
- Pending Approval
- Pending Status Changes
- Direct Cert Import**
- Initial Meal Status
- Verification
- Settings

Step 1 of 4 - Upload CSV File Step 2 of 4 - Select Matching... Step 3 of 4 - Review Matches Step 4 of 4 - Finalize Import

**Choose Free or Reduced**

Type:

**Import Source**

Source:

Import Note:

DC Effective Date:

**Extend Benefits Option**

The file contains Categorical Eligible Patrons i.e. SNAP,TANF,FDPIR (Benefits Extend To Family)

The file contains Other Source Eligible Patrons i.e. Runaway,Homeless,Migrant,HeadStart (Benefits DO NOT Extend To Family)

**Disclosure Category Opt In Option**

DO NOT OPT-IN to disclosure categories

OPT-IN to all disclosure categories (SNAP,TANF,FDPIR)

**File Upload - Delimited or Excel**

(File must have a header row)

*Note that large files may take up to 10 minutes to complete the import process. Please do not close or leave the page until the upload is complete.*

## Step 9

Select the five dropdowns highlighted in **Red** below. Then click 'Process File'

The screenshot shows the QuikApps interface with the following elements:

- Navigation bar: Home, Patrons, Reports, QuikApps, Forms, School Programs, Fees, QL Manager, Admin, Admin New, Help, Inbox, Logout
- Left sidebar: QuikApps, Letters, Application Review, Pending Approval, Pending Status Changes, Direct Cert Import, Initial Meal Status, Verification, Settings
- Progress bar: Step 1 of 4 - Upload C..., Step 2 of 4 - Select M... (active), Step 2a of 4 - Select..., Step 3 of 4 - Review..., Step 4 of 4 - Finalize L...
- Main content area:
  - Information Column(s): Case Number: (none)
  - A match on any one of the following columns is considered a good match:
    - Student Number: studentid (highlighted in red)
    - State Patron Id: (none)
    - SSN: (none)
  - Multiple columns must match the following fields to be considered a match:
    - First Name: firstname (highlighted in red)
    - Last Name: lastname (highlighted in red)
    - Grade: (none)
    - Birth Date: dateofbirth (highlighted in red)
    - School Id: (none)
  - Select the field that contains the Direct Certification Source:
    - Import Source: program (highlighted in red)
- Process File button

## Step 10

Ensure the source matches the Import Value. NOTE- If you have anything other than pictured, contact support.

The screenshot shows the QuikApps interface with the following elements:

- Navigation bar: Home, Patrons, Reports, QuikApps, Forms, School Programs, Fees, QL Manager, Admin, Admin New, Help, Inbox, Logout
- Left sidebar: QuikApps, Letters, Application Review, Pending Approval, Pending Status Changes, Direct Cert Import, Initial Meal Status, Verification, Settings
- Progress bar: Step 1 of 4 - Upload C..., Step 2 of 4 - Select M..., Step 2a of 4 - Select... (active), Step 3 of 4 - Review..., Step 4 of 4 - Finalize L...
- Main content area:
  - Table:

Import Value	Source
SNAP	SNAP
TANF	TANF
  - Process File button

## Step 11

The system will default all to checked > Make sure that the records amount at the bottom right match the total records in the file uploaded to ensure correct file was uploaded > Select 'Accept Checked'

Home Patrons Reports QuikApps Fees QL Manager Admin Admin New Help Inbox Logout

QuikApps

- Letters
- Application Review
- Pending Approval
- Pending Status Changes
- Direct Cert Import
- Initial Meal Status
- Verification
- Settings

Step 1 of 4 - Upload C... Step 2 of 4 - Select M... Step 2a of 4 - Select ... Step 3 of 4 - Review ... Step 4 of 4 - Finalize L...

Match Level: 8 - Great Match Select Matches >= Match Level Uncheck All **Accept Checked**

Drag a column header and drop it here to group by that column

Match	Patron Id	First	Last	Grade	School	BirthDate	Matched On
<input checked="" type="checkbox"/>		Aiden		12		12182004 12182004	Patron Id (Student Number)
<input checked="" type="checkbox"/>		Destiny		12		09072005 9072005	Patron Id (Student Number)
<input checked="" type="checkbox"/>		Adam		12		04272005 4272005	Patron Id (Student Number)
<input checked="" type="checkbox"/>		Bruce		12		03022004 3022004	Patron Id (Student Number)
<input checked="" type="checkbox"/>		Jace		3		10022013 10022013	Patron Id (Student Number)
<input checked="" type="checkbox"/>		Ivy		1		02022016 2022016	Patron Id (Student Number)
<input checked="" type="checkbox"/>		Sylvia		4		07032013 7032013	Patron Id (Student Number)
<input checked="" type="checkbox"/>		Earl		4		09182012 9182012	Patron Id (Student Number)
<input checked="" type="checkbox"/>		Paige		5		06112011 6112011	Patron Id (Student Number)
<input checked="" type="checkbox"/>		Hunter		5		09242011 9242011	Patron Id (Student Number)

Records: 1 of 369 - 369

SDMS Data is in Black  
Import Data is in Blue

**Step 11-** Select 'Download Matches'

## Step 12- Print Letters

Select QuikApps > Letters > Select Direct Certification Letter (Make sure your letter is up to date)

PaySchools Admin

Anywhere USA  
User: Lisa Good

Home Patrons Reports QuikApps Forms School Programs Fees QL Manager Admin Admin New Help Inbox Logout

QuikApps

- Letters
- Application Review
- Pending Approval
- Pending Status Changes
- Direct Cert Import
- Initial Meal Status
- Verification
- Settings

Districts: Anywhere USA Year: 2022-2023 Letter: Select a letter

Mail All Letters (Override Email) BCC: Select a letter

- Preview Letters (Do NOT Mark Sent)
- Preview Letter Data (Do NOT Mark Sent)
- QuikApps Determination Letter
- QuikApps Determination Letter (Spanish)
- QuikApps Direct Certification Letter
- QuikApps Disclosure Letter
- QuikApps Expiring Meal Status Letter
- QuikApps Expiring Meal Status Letter new
- QuikApps Expiring Meal Status Letter(Spanish)
- QuikApps Status Change Letter
- QuikApps Verification Letter

Copyright © 2008-2022 by PaySchools - Version: 2022.6.27.2798 Privacy

### Step 13

Show/Hide Filers to True > Click 'Mail all letters' if you want to override emails > Preview letters > if not mistakes on letter is found, generate selected letters (mark sent)

The screenshot shows the PaySchools interface with a table of letters. The table has columns for Family, Language, Delivery Method, Last Notification, Needs Letter, Effective Date, and Active. The 'Needs Letter' column is set to 'True' for all entries. Below the table, there are buttons for 'Preview Letters (Do NOT Mark Sent)', 'Preview Letter Data (Do NOT Mark Sent)', 'Generate Selected Letters (Mark Sent)', and 'Export Letter Data (Mark Sent)'. A 'Mail All Letters (Override Email)' checkbox is also present. The interface includes a navigation menu on the left and a top navigation bar with options like Home, Patrons, Reports, QuikApps, Forms, School Programs, Fees, QL Manager, Admin, Admin New, Help, Inbox, and Logout.

Family	Language	Delivery Method	Last Notification	Needs Letter	Effective Date	Active
<input type="checkbox"/> Guardian of SUSAN Sierra	English	Mail		True	2/1/2022 12:00:00 AM	
<input type="checkbox"/> The Abdul Family (Dean,Amin)	English	Mail		True	2/1/2022 12:00:00 AM	Y
<input type="checkbox"/> The Abfall Family (Jacob)	English	Mail		True	2/1/2022 12:00:00 AM	Y
<input type="checkbox"/> The Abfall Family (Wyatt,Abigail,Emma)	English	Mail		True	2/1/2022 12:00:00 AM	Y
<input type="checkbox"/> The Abrahamowicz Family (Kilee)	English	Mail		True	2/1/2022 12:00:00 AM	Y
<input type="checkbox"/> The Adair Family (Elise,Taylor)	English	Mail		True	2/1/2022 12:00:00 AM	Y
<input type="checkbox"/> The Adams Family (Ava)	English	Mail		True	2/1/2022 12:00:00 AM	Y
<input type="checkbox"/> The Adams Family (Eli)	English	Mail		True	6/30/2022	Y

Please do not hesitate to contact the PaySchools Support Staff for assistance  
1-800-669-0792, [support@payschools.com](mailto:support@payschools.com)