

PaySchools Central

Assigning a Fee

This document is intended to be a guide for entering new fees into PaySchools Central. There are a few pieces of information that you need to know before you can add a fee. Having these items documented and ready will assist you in assigning a fee. ***Your fee must be created before you can assign it. If you do not already have fee's created stop here and us the PaySchools Central Creating a Fee document as reference to complete your fee setup.***

You will need to have the following information available:

- ⇒ PaySchools Central User ID & Password - Your PSC Administrator should have assigned you a user id and password to log into PSC. If you do not have a user id and password you will not be able to proceed. Please contact Laurie Stevenson or Charlene Staniec for assistance if you do not have this information.
- ⇒ Chippewa Valley Schools PaySchools Central web link - this should be provided to you by the PSC administrator when you received your user id and password. If you do not have the link you can type **<https://chippewavalleyschools.payschools.com/>** on the address bar of your web browser.
- ⇒ Fee Name -this is the name of the fee that you will assign . ***“AP Chemistry Note Packet”*** is used as an example for this document.
- ⇒ Patron Name or Patron ID- you will need to know the name of the patron (student) or the Patron ID (Student Number) of the student that you wish to assign a fee to. ***“Staniec”*** is used as the student example for this document.

Have this information available? Great! You are now ready to begin adding your first fee!

Using the Chippewa Valley PaySchools Central web link provided by your administrator, navigate to the PaySchools Admin log in page.

Enter your user id and password on the appropriate lines

Chippewa Valley Schools

PaySchools Admin

cstaniec

Login

Help

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QuikLunch
by PaySchools
User Guide
Low Balance Letters

QuikApps
by PaySchools
User Guide
Verification Manual 2017-2018

QuikApps
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User Guide
Parent Online Application

QuikApps
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- PASS
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- Manage Fees
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or item has been add...

[PaySchools District Fee Adjust](#)
Disclosure Categories. The...

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[PaySchools Admin Version 20](#)
allows the user to vi...

[PaySchools Admin Version 2017.8.15](#): Fixes QuikApps Determination Letter Corrected issue causing the Determination letter export to intermittently cause an incorrec...

[PaySchools Admin Version 2017.7.13](#): New this Release Reports Verification Reports The new Verification Collection report consolidates all data needed to file the US...

[PaySchools Admin Version 2017.6.27](#): New This Release QuikApps QuikApps Menu The QuikApps menu was modified to match the original tab layout but in an easy to use fo...

When you are logged in you will see the PSC Admin page. From this page you will hover your cursor over the word Fees to open up the fees menu. Roll your cursor down to **Administration** then to the arrow to the right of administration. This will open the Fee Administration section. You will now roll your cursor down to **Assign Fees**

The Assign Fees menu is now open. The first thing that you must do is search for the patron that you want to assign the fee to.

Fee's can be assigned in several ways. You can assign fees to students using the following filters: Grade, Gender, Homeroom, student name or student ID. **In most cases you will simply search on student last name or patron id.**

Patron School: This is the school of the patron that you are going to search for. This will default to the school that you have access to.

Patron Grade: This is a filter that can help you narrow down the list of students you wish to assign a fee to. Click the drop down arrow to open a list of grades.

Patron Gender: This is a filter that can help you narrow down the list of students you wish to assign a fee to. Click the drop down arrow to open a list of genders.

Homeroom: This is a filter that can help you narrow down the list of students you wish to assign a fee to. Click the drop down arrow to open a list of homerooms.

First Name: This is the first name of the patron that you are going to search for.

Last Name: This is the last name of the patron that you are going to search for.

Patron ID: This is the CVS Student ID of the patron.

The screenshot shows the 'Assign Fees' page in the PaySchools Admin interface. At the top, the 'PaySchools Admin' logo is on the left, and 'Chippewa Valley Schools' with the user 'Charlene Staniec' is on the right. A navigation bar contains links for Home, Patrons, Reports, Fees, Admin, Admin New, Help, and Logout. The main content area is titled 'Assign Fees' and features a 'Select District' dropdown set to 'Chippewa Valley Schools' and a checked option 'Keep Patron and Fee choices in sync'. Below this are two search sections: 'Patron Search' and 'Fee Search'. The 'Patron Search' section includes dropdowns for Patron School (Dakota High School), Patron Grade (All Grades), Patron Gender (All), and Homeroom (All Homerooms), along with text input fields for First Name, Last Name, and Patron ID, all of which are currently redacted with green boxes. A 'Patron Search' button is located below these fields. The 'Fee Search' section includes dropdowns for Fee School (Dakota High School), Fee Grade (All Grades), and Fee Gender (All), along with text input fields for Fee Code and Fee Keyword, and checkboxes for 'Include Inactive' and 'Include Expired'. A 'Fee Search' button is located below these fields. Below the search sections are two columns: 'Selected Patrons' and 'Selected Fees', both of which are currently empty. To the right of these columns are fields for 'Assigned Date' (7/19/2018) and 'School Year' (2018-19). At the bottom of the main content area are buttons for 'Delete Selected' and 'Delete All' under both columns, and a large 'Assign Selected Fees to Selected Patrons' button. A green starburst callout points to the Patron Search fields with the text: 'Tool Tip! The easiest way to search is by Last Name or Patron ID!'. At the very bottom, a footer contains the copyright information: 'Copyright© 2008-2018 by PaySchools - Version: 2018.6.28.1827 Privacy Policy | Terms & Conditions'.

Assign Fees

Select District: Chippewa Valley Schools

Keep Patron and Fee choices in sync

Patron Search

Patron School: Dakota High School
 Patron Grade: (All Grades)
 Patron Gender: All
 Homeroom: (All Homerooms)
 First Name:
 Last Name: Staniec
 Patron ID:

Patron Search

Fee Search

Fee School: Dakota High School
 Fee Grade: (All Grades)
 Fee Gender: All
 Fee Code:
 Fee Keyword:

Include Inactive Include Expired

Fee Search

Selected Patrons

Empty list box for selected patrons.

Delete Selected Delete All

Assign Duplicate Fees

Select Patron

(alphabetical by last name)

Andrew Staniec (ID=1450798372 - Grade: 11)

Add Selected Add All Finished

1 Patrons added

Searching by Last Name or Student ID are the two easiest ways to find the student you wish to assign a fee to. In this example, we are searching for the last name of Staniec.

Put your cursor in the Last Name box, type the last name and then click on the orange "Patron Search" button.

The Search box will pop up all students that meet the criteria of attending Dakota High School and having the last name of Staniec. Click the name one time to select it. PSC will highlight the name in orange. Once the name is selected you can click the "Add Selected" button at the bottom of this screen. You will see that the student is added in the Select Patrons Box and it will say 1 Patrons added at the bottom of the list box. You can now click the "Finished" button to close the list box.

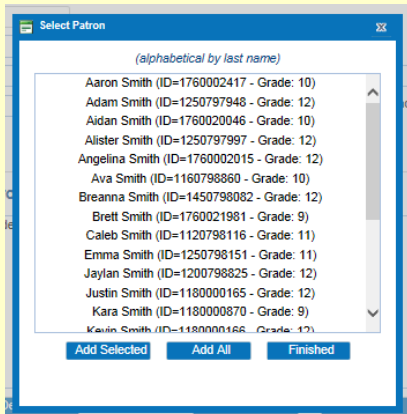
Add Selected: This adds the student that you clicked and highlighted in orange.

Add All: This will add all the students that came up in the search.

Finished: This indicates that you are done selecting from the list box that opened up and the box will close.

There may be times that you want to add a fee for more than one student at a time.

After the initial student is added you can click the last name box again, type in another last name and search again. Just like you did with the first student, you can click once on the name to highlight it in orange, then click the **Add Selected** button to add them to the Selected Patron list.



Continue to follow the search steps until you have all of the students in the **Select Patrons** box that you want to assign your fee to.

Once your students are selected you can begin to search for the fee that you wish to assign.

The screenshot shows the 'Assign Fees' interface in the PaySchools Admin system. The header includes the PaySchools Admin logo and the user name 'Charlene Staniec'. The main navigation bar contains links for Home, Patrons, Reports, Fees, Admin, Admin New, Help, and Logout. The 'Assign Fees' section is active, showing a dropdown for 'Select District' set to 'Chippewa Valley Schools' and a checked option for 'Keep Patron and Fee choices in sync'. Below this are two search sections: 'Patron Search' and 'Fee Search'. The 'Patron Search' section includes dropdowns for Patron School (Dakota High School), Patron Grade (All Grades), Patron Gender (All), and Homeroom (All Homerooms), along with text input fields for First Name, Last Name (Staniec), and Patron ID. The 'Fee Search' section includes dropdowns for Fee School (Dakota High School), Fee Grade (All Grades), and Fee Gender (All), along with text input fields for Fee Code and Fee Keyword (Chem). There are checkboxes for 'Include Inactive' and 'Include Expired'. Below the search sections are two boxes: 'Selected Patrons' containing 'Andrew Staniec (ID=1450798372 - Grade: 11)' and 'Selected Fees' which is currently empty. To the right of the 'Selected Fees' box are fields for 'Assigned Date' (7/19/2018) and 'School Year' (2018-19). At the bottom of the interface, there are buttons for 'Delete Selected' and 'Delete All' for both sections, checkboxes for 'Assign Duplicate Fees', 'Ignore Grade Restrictions', and 'Allow Fee Assignments Across Schools', and a button for 'Assign Selected Fees to Selected Patrons'. A red message at the bottom states 'Approximately 0 Fees will be assigned'. The footer contains the copyright information: 'Copyright© 2008-2018 by PaySchools - Version: 2018.6.28.1827 Privacy Policy | Terms & Conditions'.

Assign Fees

Select District: Chippewa Valley Schools

Keep Patron and Fee choices in sync

Patron Search

Patron School: Dakota High School
Patron Grade: (All Grades)
Patron Gender: All
Homeroom: (All Homerooms)
First Name:
Last Name: Staniec
Patron ID:

Patron Search

Fee Search

Fee School: Dakota High School
Fee Grade: (All Grades)
Fee Gender: All
Fee Code:
Fee Keyword: Chem
 Include Inactive Include Expired

Fee Search

Selected Patrons

Andrew Staniec (ID=1450798372 - Grade: 11)

Delete Selected Delete All

Selected Fees

(Empty box for selected fees)

Delete Selected Delete All

Assign Duplicate Fees Ignore Grade Restrictions Allow Fee Assignments Across Schools

Assign Selected Fees to Selected Patrons

Approximately 0 Fees will be assigned

Assigned Date:

7/19/2018

School Year:

2018-19

The PSC Fee Search works the same way that the Patron Search worked. You can filter down your list of fee's by Grade, Gender, Fee Code or Fee Keyword.

Fee Grade: This is a fee that applies to a specific grade. Using this filter will pull up all fees that were created for a specific grade.

Fee Gender: This is a fee that applies to a specific gender.

Fee Code: This is the name of a fee that has already been created.

The easiest way is to use the Fee Keyword search box. In this example we will search for a fee with the word "Chem" in it. This search works just like the student search did. It will find all fee's with the keyword "Chem."

Select Fees (alphabetical by fee name)

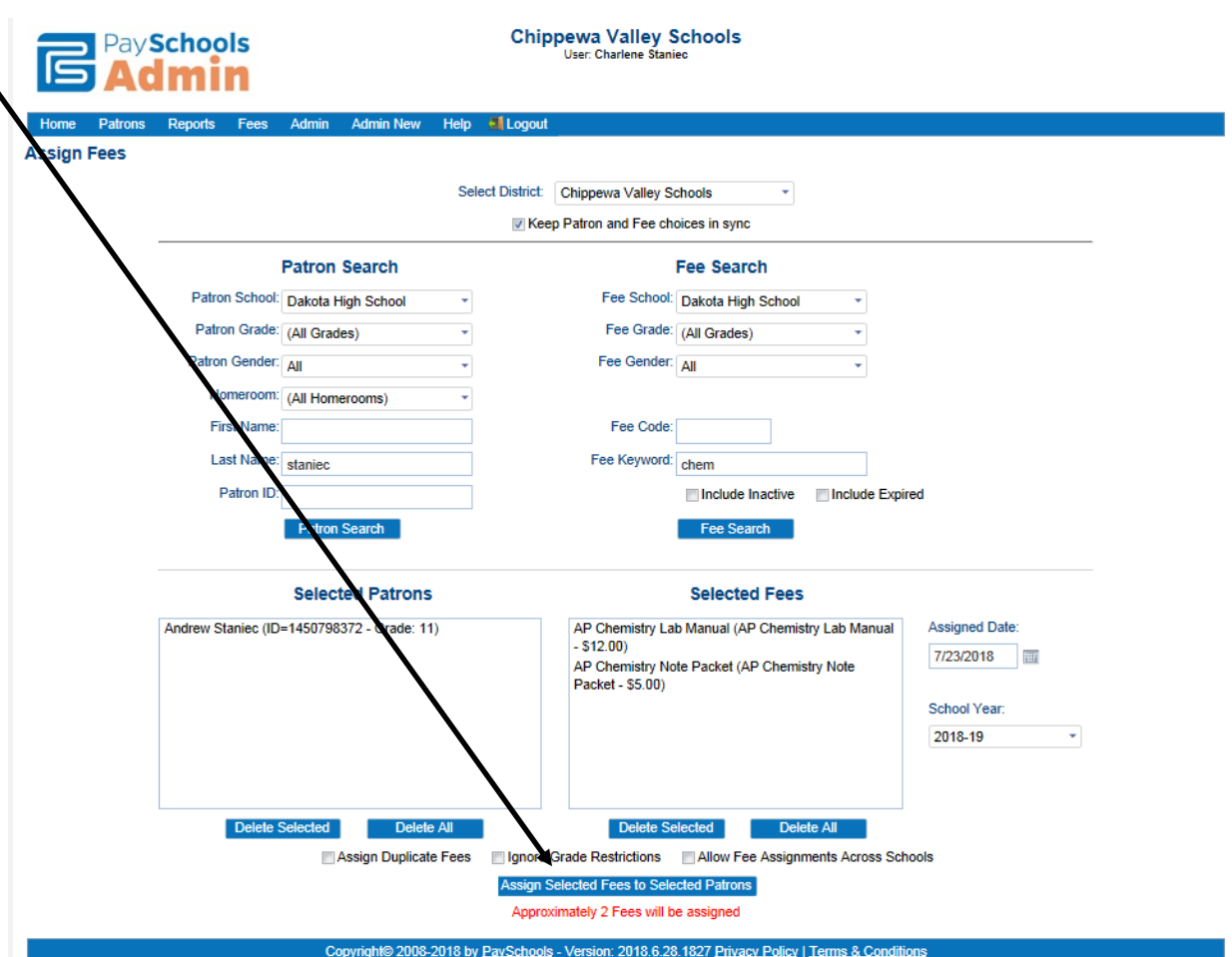
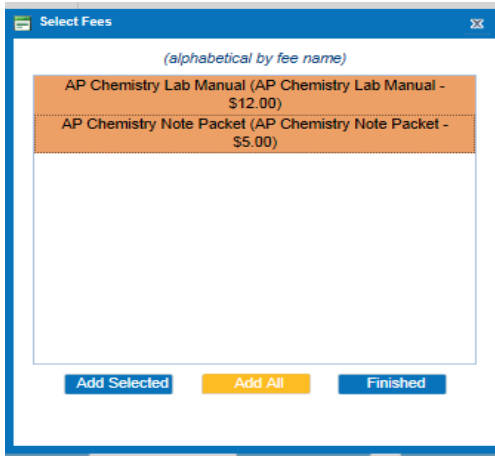
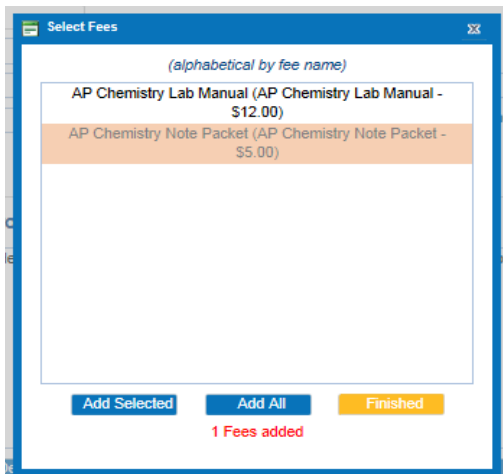
- AP Chemistry Lab Manual (AP Chemistry Lab Manual - \$12.00)
- AP Chemistry Note Packet (AP Chemistry Note Packet - \$5.00)

Add Selected Add All Finished

All the fees with the word "chem" in them come up. Now you can select the fee that you wish to assign. Click once on the name to highlight it in orange then click the **Add Selected** button. To add both of these fees to the previously selected student(s) you would click the **"Add All"** button.

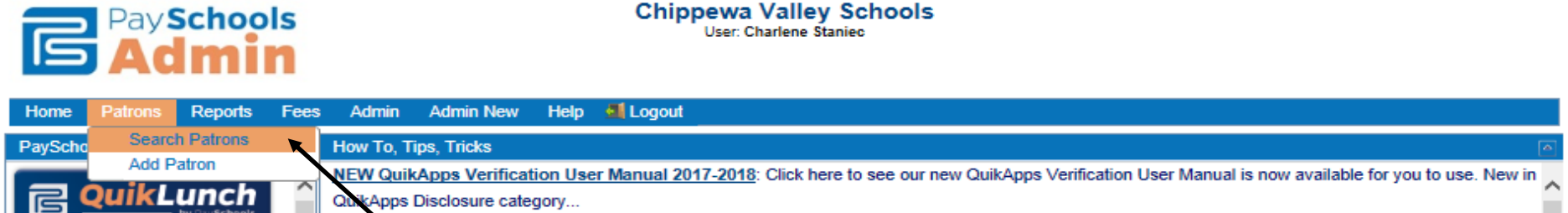
Once your fees are added to the Selected Fees box you will click on the **"Assign Selected Fees to Selected Patrons"** button at the bottom of the screen.

You are finished assigning a fee!



What if I accidentally assign a fee to the wrong student?

No problem! We can turn it off!



That's an easy fix! Start by going to the Patron menu. Roll down to **"Search Patron"** to bring up a student search box.

PaySchools Admin
Chippewa Valley Schools
User: Charlene Staniec

Home Patrons Reports Fees Admin Admin New Help Logout

Patron Name or ID Search
staniec

How The Search Works
Searching By Name
Entering a single string i
Entering strings in it
return patrons like
Timothy Thomas and Tor
But would not return
Tim Jones or Jim Tomar

Searching by ID
Entering a number into the search box will return any patron whose Patron Id or Pin Number match or begin with the search value.

Include State Id in Search
Checking this option will also include matches to the State Id whether a number or string is entered.

When the patron search box opens up you will type the last name of the student and then click the blue **"Search"** button.

Patron Name or ID Search
staniec

Id/Pin	Last Name	First Name	Middle Name	School	Grade	Birth Date	Active
1450798372/0	Staniec	Andrew		Dakota High School	11	3/22/2002	Y
1760006	Staniec	Cass	Joseph	Seneca Middle School	6	5/4/2007	Y

Page size: 10
2 items in 1 pages

A list of students with the last name you entered will come up. You should only see students for the school you have been assigned (this example shows students from multiple schools).

Using click one time on the **Patron ID** (Student Number) of the student you wish to view.

Home Patrons Reports Fees Admin Admin New Help Logout

ID/Pin#: 1450798372 / 0 Staniec, Andrew BD: 3/22/2002 Dakota High School Grade 11

Patron Name or ID Search

Patron Data Fees Lunch Account Accounts Family History

School/Identification Contact/Demographics QuikLunch QuikLunch Restrictions

District: Chippewa Valley Schools Patron Id: 1450798372
 School: Dakota High School Pin Number: 0
 School Locked: N State Id: 16547
 Program: Select... SSN:
 Program Locked: Select.. Active: Y
 Registered at PFI: N

Grade: 11
 Homeroom: 121
 Homeroom 2:
 Special Needs: N

Revert Unsaved Changes Save Changes Advanced Edit

This opens up the Patron screen. You can see specific information for this student directly under the admin menu. Student specific information appears in orange. Under the student specific information is another menu - from this menu you will click on the word "Fees."

Home Patrons Reports Fees Admin Admin New Help Logout

ID/Pin#: 1450798372 / 0 Staniec, Andrew BD: 3/22/2002 Dakota High School Grade 11

Patron Name or ID Search

Patron Data Fees Lunch Account Accounts Family History

Assigned Fees Fee Payments

Include Inactive Fees Include Paid Fees

Name	Due Date	Amount Due	Amount Paid	Paid	Optional	Tax Exempt	Active	Origin
All							All	All
> AP Chemistry Lab Manual	06/30/2019	12.00	0.00	False	False	False	N	SDMS2
> AP Chemistry Note Packet	06/30/2019	5.00	0.00	False	False	False	N	SDMS2

Page size: 10 2 items in 1 pages

You can now see the fees that have been assigned to this specific student.

Home Patrons Reports Fees Admin Admin New Help Logout

ID/Pin#: 1450798372 / 0 Staniec, Andrew BD: 3/22/2002 Dakota High School Grade 11



Patron Data Fees Lunch Account Accounts Family History

Go To PASS


Assigned Fees Fee Payments

Include Inactive Fees Include Paid Fees

Fee Updated successfully

Name	Due Date	Amount Due	Amount Paid	Paid	Optional	Tax Exempt	Active	Origin	
All							All	All	
AP Chemistry Lab Manual	06/30/2019	12.00	0.00	False	False	False	Y	SDMS2	
AP Chemistry Note Packet	06/30/2019	5.00	0.00	False	False	False	Y	SDMS2	

Page size: 10 2 items in 1 pages

To remove a fee from a student record you will click on the PSC edit icon  all the way to the right of the fee. This will open the Edit Fee Assignment window.

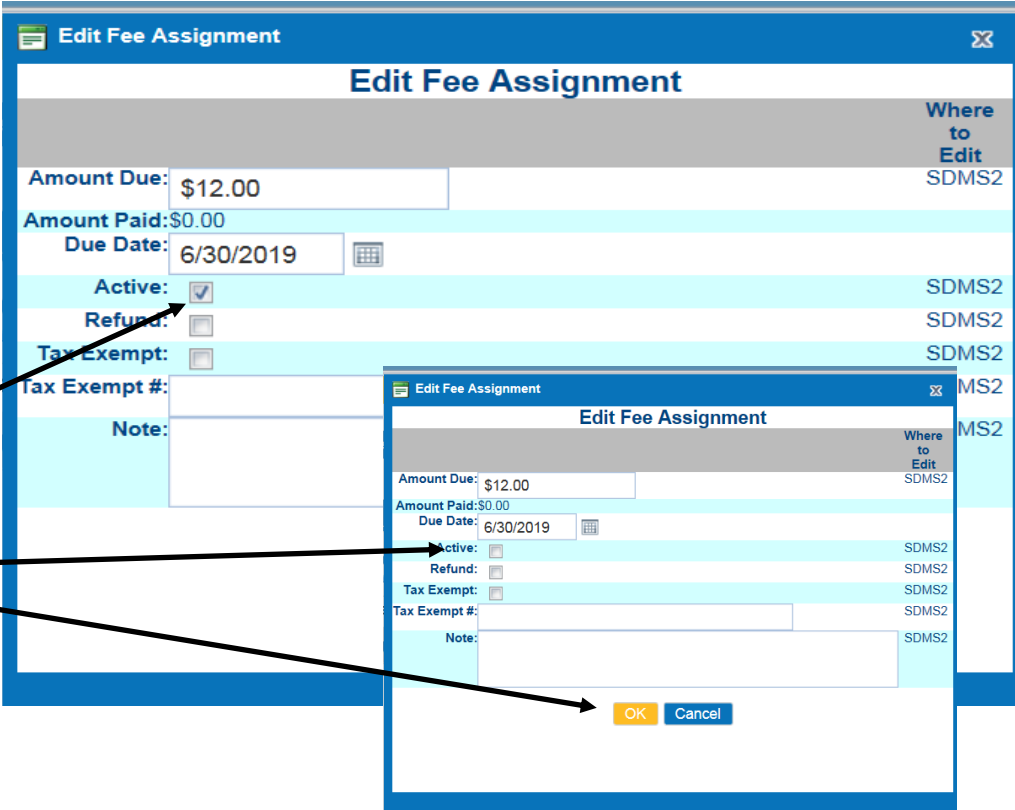
The Edit Fee Assignment window is where you will change the fee gets changed for this student.

Please note:

You cannot delete the fee but you can inactivate it.

From this screen you will **Inactivate** the fee for this student. To inactivate the fee you will click the check box next to the word Active.

This will uncheck the box and the **OK** button will be in orange. Click the **OK** button to confirm the change.



Edit Fee Assignment

Where to Edit: SDMS2

Amount Due: \$12.00

Amount Paid: \$0.00

Due Date: 6/30/2019

Active: (Previously checked)

Refund:

Tax Exempt:

Tax Exempt #:

Note:

OK Cancel

Patron Name or ID Search

Include State Id in Search
 Include Inactive Students

Search

Previous Search

Go To PASS

Include Inactive Fees Include Paid Fees

Fee Updated successfully

Name	Due Date	Amount Due	Amount Paid	Paid	Optional	Tax Exempt	Active	Origin
All							All	All
AP Chemistry Lab Manual	06/30/2019	12.00	0.00	False	False	False	N	SDMS2
AP Chemistry Note Packet	06/30/2019	5.00	0.00	False	False	False	Y	SDMS2

You will now see that that specific fee is no longer in an Active status. The Active flag has been set to "N." This fee is now "turned off" for this student.

Please note: You cannot add this fee to this student a second time. If you want to re-assign the fee to the student you will follow these same steps to the point that you inactivated the fee. Instead you will click the empty check box next to Activate to turn the fee back on. After you have checked the box you will click **OK to make the change.**

Edit Fee Assignment

Where to Edit: SDMS2

Amount Due: \$12.00

Amount Paid: \$0.00

Due Date: 6/30/2019

Active: SDMS2

Refund: SDMS2

Tax Exempt: SDMS2

Tax Exempt #: SDMS2

Note: SDMS2

OK Cancel

You are now done turning off a fee added by mistake for a student!