

This document is to help guide you through the process of downloading and processing the Direct Certification file, uploading it to the TX-UNPS site for processing, downloading the returned file, transferring it to your Child Nutrition Server and then processing the file.

Notice that in the pictures below I have set my personal PC to show the file extensions (.xls, .CSV, etc). This may not be the case for your specific PC and that is okay. I just set mine up this way to provide a better visual.

# **1 Creating the Direct Certification Export File**

- 1.1 Select (L) = LUNCH APPLICATION MENU
- 1.2 Select . TRECT CERTIFICATION MENU
- 1.3 **Select (D)** = CREATE DIRECT CERT EXPORT FILE

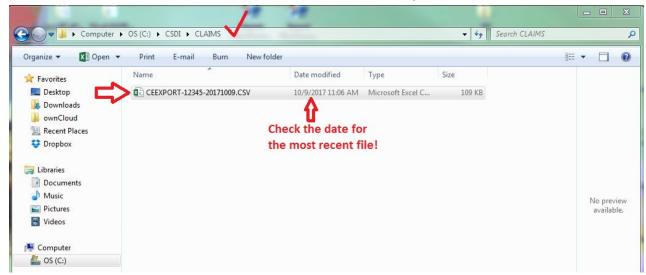


- 1.4 **Type** I to Export the CEEXPORT-CEID-DATE.CSV file to your **C:\CSDI\CLAIMS** folder.
- 1.5 The screen should briefly flash and take you back to the Direct Certification menu.

The file has been sent to your PC (C:\CSDI\CLAIMS folder). We now need to change the file type as per TDA Instructions.

# 10/11/2017 2 Changing the Direct Certification Export File Type.

2.1 Navigate to your **C:\CSDI\CLAIMS** folder to open the Direct Cert Export File we just created. Double click on the file with the current date to open it in Excel.



2.2 With the file open in Excel, be sure to click on "Enable Editing" at the top **if prompted**.

2.3 **Press** [12] on your keyboard to bring up the Save As dialog box as shown below.

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4 Save as <u>t</u> ype:	CSV (C	omma delimited) (*.csv)							•
3 Authors:	Alex		Tags: Add a	tag	Title: Add a t	itle			

2.4 **Click** the down arrow by the "Save as type:" and select Excel 97-2003 Workbook. TDA is requiring the file to be a xls or .xlsx.

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) Hide Folders	Excel 97-2005 Workblock (*.35) CSV UTF-8 (Comma delimited) (*.csv) XML Data (*.xml) Single File Web Page (*.mht;*.mhtml) Web Page (*.htm;*.html) Excel Template (*.xltx)	Choose this option. It is oka doesn't show on your version	

#### 2.5 Click Save then you can close Excel.

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2.6 The new .xls file should be in the **C:\CSDI\CLAIMS** folder. This is the file we will be uploading to TDA as per their instructions.

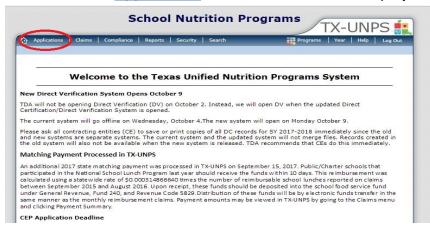
Organize 👻 🔀 Open	✓ Print E-mail Burn New	folder						6
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# 10/11/2017 3 Uploading the CE Import File

- 3.1 Login to the TX-UNPS system
- 3.2 If presented with the Programs screen, select School Nutrition Programs.

	School Nutrition Pr	TX-UNPS
Applications	Claims   Compliance   Reports   Security   Search	Programs   Year   Help   Log Out
	Programs	
	School Nutrition Programs	
		Food Distribution Program

3.3 On the blue menu bar, select Applications and the menu screen displays.

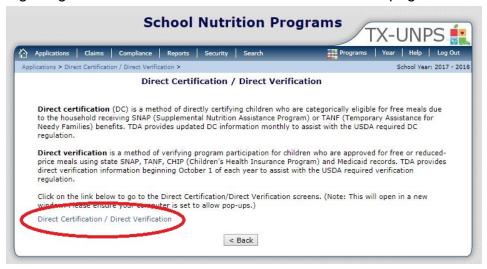


#### 3.4 **Select** <u>Direct Certification/Direct Verification</u> and a new page displays.

🟠 Applications   Claims   Complian	ce   Reports   Sec	urity Search	Programs   Year   Help   Log Or			
Applications >			School Year: 2017 - :			
Item	Descript	ion				
Application Portal	Access to	all program application	ins			
Application Packet	Applicatio	ons Forms (Contracting	Entity and Site)			
Attachment B		Policy Statement for Free and Reduced-Price Meals, Attachment B: Meal Count/Collection Procedure(s)				
Second Review of Applications		FNS-874 report for Contracting Entitys selected to conduct a second review of applications.				
Verification Report	Mandator	Mandatory Annual Verification Report				
Food Safety Inspections	Number o	of Food Safety Inspect	ions by Site			
Annual Audits	Annual A	Annual Audits				
Financial Report	School Fo	School Food Annual Revenues and Expenditures Report				
FFVP Application Packet	Fresh Fru	Fresh Fruit and Vegetable Program Application Forms (SFA and Site)				
FFVP Grants	Fresh Fru	Fresh Fruit and Vegetable Program Grant Information for a specific CE				
Summer Nutrition Program Costs	Total Cos	Total Costs Associated with Operating a Summer Nutrition Program				
Capital Expenditure Request	Request f	Request for funds to purchase capital items >= \$5,000				
Community Eligibility Provision	Enrollmer	Enrollment and Eligibility for Community Eligibility Provision				
Texas Summer Mandate	Summer	Summer Nutrition Programs Intent Declaration				
Direct Certification / Direct Verifica	ion Direct Ce	rtification / Direct Veri	fication screens			

10/11/2017

3.5 **Select** <u>Direct Certification/Direct Verification</u> and the new Direct Certification page loads. You will have to log in again to access the new Direct Certification webpage.



#### 3.6 Click Direct Certification on the top menu bar.

Direct	Certific	ation Direc	t Verificatio	ion
A Home	Resources	Direct Certification	Direct Verification	Reports
				DCDV Home
Contractin	ng Entity 🧃			
				Message Board 🗭
Please not information	e, you will need I on the file form	at.	do batch uploads in bo	both Direct Certification and Direct Verification. The match reports will also be in a different format and you will need to make sure you or message that your "CE ID in the data file does not match the User's selected CE," check and see if your file has column headings.
Last Updated	d: Thursday, Octob	er 05, 2017 12:41:06 PM		
<u>v1.0.0</u>				Texas Department of Agriculture. All rights Reserved.
				Unauthorized use is prohibited. Use may be subject to security testing and monitoring. Misuse is subject to criminal prosecution. No expectation of privacy except or otherwise provided by applicable privacy laws.

#### 3.7 **Select** <u>Browse</u> to find the .xls file to upload.

Direct	Certific	ation Direct	t Verificatio	on				
🔒 Home	Resources		Direct Verification	Reports				
							Direct	Certification
Contractin	g Entity		*					
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File to	Import		d File Types for Impose that only files with		sx extensions ca	an be imported.		There are 20
Browse.							① Upload	
Brewse to	a local file lo	cation to select the file to	o be uploaded.					
<u>v1.0.0</u>								Agriculture. All rights Rese
					Misus			ay be subject to security te of privacy except or other

DirectCertificationFileProcessing\_18.docx

3.8 You will **browse** to C:\CSDI\CLAIMS folder if you use our recommended configuration.

- Click on Desktop on the left menu.
- **Double-Click** on My Computer.
- Double-Click on your drive C: It will have C: in parenthesis (C:) .
- **Double-Click** on CSDI.
- **Double-Click** on CLAIMS.
- **Double-Click** on the current .xls file to upload or select the current file and **Click** Open.

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Favorites	Nana	Date modified	Туре	Size		
💻 Desktop	CEEXPORT-12345-20171009.xls	10/9/2017 3:26 PM	Microsoft Excel 97	306 KB		
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🍌 ownCloud 🔄 Recent Places						
💱 Dropbox						
Libraries 📰						
Music						
Pictures						
Videos						
Computer						
Network 👻						

3.9 Select <u>Upload</u>. The process takes anywhere from 10-30 seconds. DO NOT click Upload more than once!

Texas Unified	Nutrition F 🗙	E Direct Certification X	
⇒ C ∆	Secure	https://dcdv.texasagriculture.gov/DirectCertification	
Direct C	Certific	ation Direct Verification	
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			Direct Certification
Contracting	Entity	*	
🕏 Upload	<b>Q</b> Sear	h	
File to I	mport	Supported File Types for Importing	The num
		Please note that only files with .xls, or .xlsx extensions can be in	There are
Browse	CEEXPOR	-12345-20171009.xls 🗸	Upload
Browse to yo	ur local file loo	ation to select the file to be uploaded.	

3.10 There will be a delay while the file is being processed. If you have had a successful upload, the screen will tell you how many records were in the file and how many were successfully matched. You should get a "File Successfully Uploaded" message like the image below.

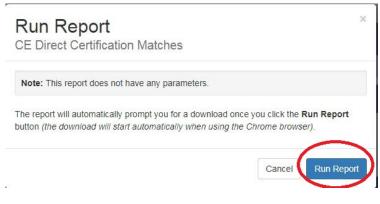
	How-T	o 🕒 Log Out
Direct Ce	rtification 2017–2018 s	ichool Year
	✓ File Successfully Uploaded	×
• Upload	The import is complete. The total number of records in the uploaded file is . The number of records successfully matched in this session is Click on the Reports link at the top of the page to locate and download the current Claimed Matches report	
	Best Practice: Use the Snipping Tool, found in Windows Accessories, to save a screenshot of the Upload results, Click on "How To" in the menu bar for a tutorial on how to use the tool and how to save screenshots.	N-

3.11 **Click** on the Reports icon on the top menu bar to download the Direct Cert Matches.

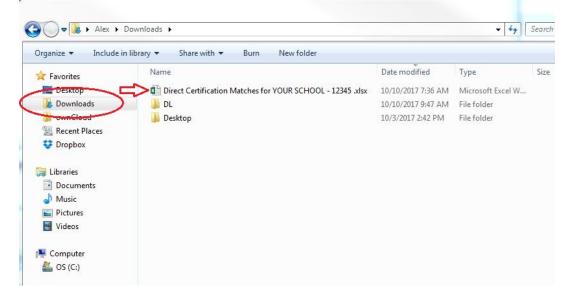
Direct Certificati	on Direct Verification	
♠ Home Resources Di	rect Certification Direct Verificatio	
		Direct Certification
Contracting Entity		
Upload Q Search		
File to Import	Supported File Types for Importing Please note that only files with	✓ File Successfully Uploaded
		The import is complete. The total number
Browse		Upload     The number of records successfully matc
Browse to your local file location	to select the file to be uploaded.	Click on the Reports link at the top of the
		Best Practice: Use the Snipping Tool, To <sup>*</sup> in the menu bar for a tutorial on how t

3.12 **Click** on CE Direct Certification Matches.

Direct Certification Di	irect Verification	
A Home Resources Direct Certific	cation Direct Verification Reports	
	Reports	
Contracting Entity		
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	Reports for Direct Certification Dire	ct Verification
Direct Certification Match Reports	CE Direct Certification Matches DC Records of claimed students for CE by month or year-to-date	Run All Year - Ad hoc
	Data for Verification Report Direct certification matches based on enrollment for the last operating day of October used to complete the Verification Report	Run Nov 5th - June 30th
	Data for CEP Report Direct certification matches based on enrollment for mid-March used to complete the CEP report	Run March 5th - June 30th
	End of Year Claimed Certification Matches DC Records of claimed students for CE	Run June 5th - June 30th
Direct Verification Reports	CE Direct Verification Matches DV Records of claimed students for CE	Run Oct 1st - June 30th



3.14 Locate the Direct Certification Matches Excel file that was downloaded and open it in Microsoft Excel. The file will commonly be downloaded to your "Download" folder.



3.15 With the file open in Excel, be sure to click on "Enable Editing" at the top if prompted.

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3.17 Navigate to your C:\DC folder. This is very important! The easiest way to do this is to locate your C: Drive on the left-hand side then double click the DC folder to open it as shown below.

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👽 Dropbox	^	Name	Date modified	Туре	Size		
		🎍 4bf9b8b1c29e95b5b85771d5	1/16/2015 5:24 PM	File folder			
Libraries		🐌 838dff21490c63ff566e621b	3/26/2014 4:10 PM	File folder			
7.5		🌗 Apps	1/31/2014 11:28 AM	File folder			
J Music	-	CreateFTPDC	8/4/2017 10:12 AM	File folder			
Pictures		📙 CSDI	10/9/2017 11:30 AM	File folder			
Videos 🖌		, j.	3/28/2014 4:36 PM	File folder			
	C	\mu DC 🌒	10/9/2017 2:15 PM	File folder			
Computer	=	uen den	4/25/2016 8:04 AM	File folder			
🚢 OS (C:)		🎉 Drivers	11/11/2013 6:23 PM	File folder			
		📕 EasySpooler	1/5/2015 11:11 AM	File folder			
Network		ESD	12/9/2014 4:49 PM	File folder			
	*	퉬 Intel	1/31/2014 11:08 AM	File folder			
File name:	Direct	Certification Matches for YOUR SCHOO	L - 12345.xlsx				
Save as type:	Excel \	Workbook (*.xlsx)					
Authors:	Alex	Tags:	Add a tag	Title: Ad	ld a title		

- 3.18 Rename the File name: at the bottom to DCMMYYYY (MM = current month, YYYY = current year). Just be sure **THERE ARE NO SPACES IN THE FILE NAME** or it will fail to transfer.
- 3.19 Change the Save as type: to a **CSV (Comma delimited (\*.csv)** as shown below. This is also very important as our system will depend on this file format to process the list.

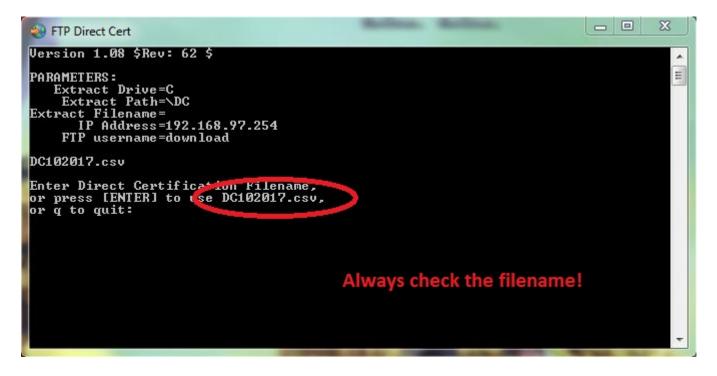
Computer 🕨 OS (C:) 🕨 DC 🔸		10.		Search DC		_
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Save a type: CSV (Comma delimited) (*.cs	v)					
Authors: Alex	Tags: Add a tag	Title: A	dd a title			
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3.20 Click Save then you can close Excel (click the X on the top right).

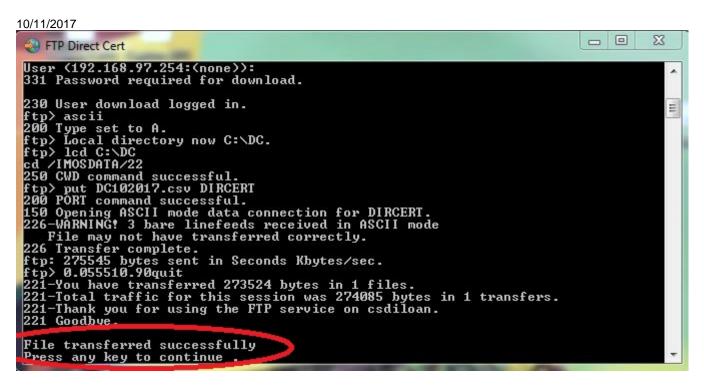
#### 10/11/2017

# 4 Transferring the Direct Cert file to your Child Nutrition Server

- 4.1 If you have a FTP Direct Certification icon on your desktop, **double-click** on it and proceed to 4.6.
- 4.2 Click on the Windows Start button in the lower left corner of your screen.
- 4.3 Click Programs or All Programs.
- 4.4 **Click** the **CSDI** folder.
- 4.5 Click FTP Direct Cert.
- 4.6 A window opens and the next-to-last line should specify the current file name.



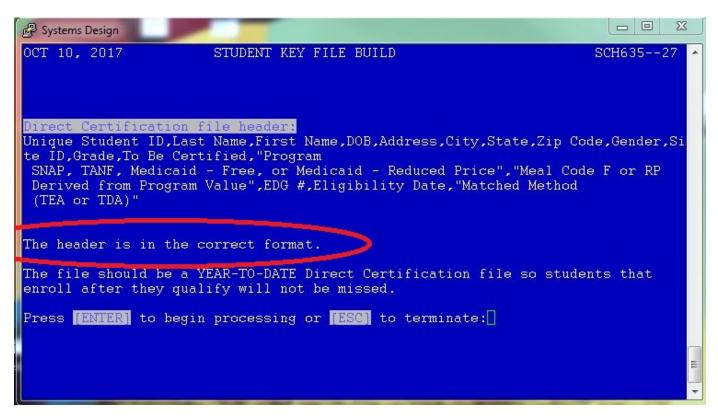
- 4.7 If the filename is correct, **press** to transfer the file to the Child Nutrition server; otherwise **type** () to quit.
- 4.8 The file transfer occurs and you will be informed of the result.
- 4.9 Note the next to last line. It will report either File transferred successfully or File failed to transfer, correct the problem and retry. If it does not read File transferred successfully then you will need to resolve the problem. If needed you may contact Systems Design for support. **Press** to close the window.



4.10 The file is now ready to process using the Systems Design software.

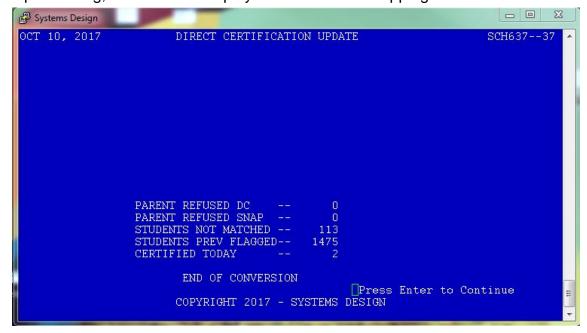
To process the Direct Certification file, you will login in to you Child Nutrition System and select:

- 5.1 Select (L) = LUNCH APPLICATION MENU
- 5.2 **Select (D)(B)** = DIRECT CERTIFICATION MENU
- 5.3 Select 2 = PROCESS DIRECT CERTIFICATION
- 5.4 **Specify** your printer # and **confirm** it.
- 5.5 The program will check the header of the file to ensure we are processing a properly formatted file. You should see a screen similar to the following:



- 5.6 If your file is in the proper format you will see the message Press [ENTER] to begin processing or [ESC] to terminate: otherwise you will only be given the option Press [ENTER] to terminate processing:
- 5.7 **Press**  $\begin{bmatrix} \text{Enter} I \end{bmatrix}$  to begin processing or **press**  $\begin{bmatrix} \text{Enter} I \end{bmatrix}$  to exit.
- 5.8 **Type** 🖺 to build the cross-reference and continue; otherwise **type** 🖻 or 🔊 to terminate.
- 5.9 You will be prompted to enter the Certification Date. **Press** [ to use today's date.
- 5.10 You will be prompted to confirm your entry. **Type** M to proceed; otherwise **type** N to reenter the certification date or **type** C to terminate and exit.

10/11/2017 5.11 After processing, statistics will display on the screen recapping the results of the run.



5.11.1 **Press** and a copy of the statistics will print.

# 10/11/2017 6 Processing the Direct Certification Exceptions

6.1 These are the students that did not match automatically. TDA is now matching based on <u>name and birthdate</u> which is going to lead to more Exceptions (ANY small difference in a student's name between PEIMS and TDA will cause them not to match. For example, John Michael Smith and John-Michael Smith will cause an exception because of the hyphen).

We will use **STUDENT MASTERFILE MAINTENANCE** to look up and determine if the students listed on the report exist in your database. If so, you will manually mark their Direct Certification status.

You will ignore any report lines which have **Refused** in the **D/C SNAP** column as they are informational to remind you those student's parents have refused benefits.

- 6.2 Select (L)A = LUNCH APPLICATION MENU
- 6.3 Select 2 = STUDENT MASTERFILE MAINTENANCE
- 6.4 FUNCTION [\*]

6.5 **Type** in the STUDENT ID# field to perform a lookup.

P Systems Design Documentation			
DEC 30, 2013	STUDENT MASTER	FILE MAINTENANCE CHANGE	SCH00538
STUDENT ID# -[	1	20=FAMILY CODE -[	1
	STUDENT NA	ME INQUIRY IIF	
NAME=_		SCHOOL=	
	COPYRIGHT 2013	- SYSTEMS DESIGN	

6.6 Enter the student's last name from the report.

6.7 Enter the student's first initial from the report.

6.8 Press at SCHOOL.

P Sy	stems [	Design Docume	ntation							
EC	30,	2013		STUDENT	MASTER	FILE MAINTEN	ANCE CHAN	IGE	:	SCH00537
	STUD	ENT ID#	-[	]		20=FA1	MILY CODE	- [		]
				STU	DENT NA	ME INQUIRY I	TF			
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				ANDRIA J		08/28/02	8328	0101	05	
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		BROWN,	JAYC	IE L		07/21/96	2105	0001	12	
		BROWN,	JESU	SA		10/05/99	6827	0001	07	
		BROWN,				01/16/97		0001	11	
		BROWN,					711	0101	E	
		BROWN,				04/26/00			08	
		*BRYANT	, ASH	LEY N		09/27/93	7418	0001	12	
			_							
						- SYSTEMS D				_

6.9 The list displays showing the closest matches in the system. You may use the 1 and 1 to move the selection bar up and down to select a student if you find a match. The Date-of-Birth is display to the right of the name which you can compare against the one listed on the **DIRECT CERTIFICATION EXCEPTION REPORT**. If you find a match **highlight the entry** with the selection bar and **press** . Otherwise **press** .

If you find a matching record, **note** the Student ID on the **DIRECT CERTIFICATION EXCEPTION REPORT** to the right of the student name; otherwise **note** an X to indicate you attempted to look up the student but were unable to find a match in the system and go to step 8.4.

We want to mark ALL students we can whether or not they are active. We include Inactive in the event they re-enroll so they will start receiving the benefit immediately.

- 6.10 The student record displays on the screen. We will change three fields (32, 07 and 09):
  - 6.10.1 ALL OK?(YNCML)-[\*]
  - 6.10.2 FIELD-[\*\*]

6.10.3 32=DC[\*] T or S or C or M as indicated on the report

6.10.4 07=CURR STATUS -[\*]

- 6.10.5 32= HS[N] ES[N] HM[N] MI[N] RU[N] FO[N] **press** [ 6 times.
- 6.10.6 If the date used in step 7.11 is today's date skip to step 8.9.9 and the system will automatically update field 09.

6.10.7 FIELD-[\*\*]

6.10.8 09=STATUS CHG DT-[\*\*\*\*\*

] Enter the date used in step 7.11.

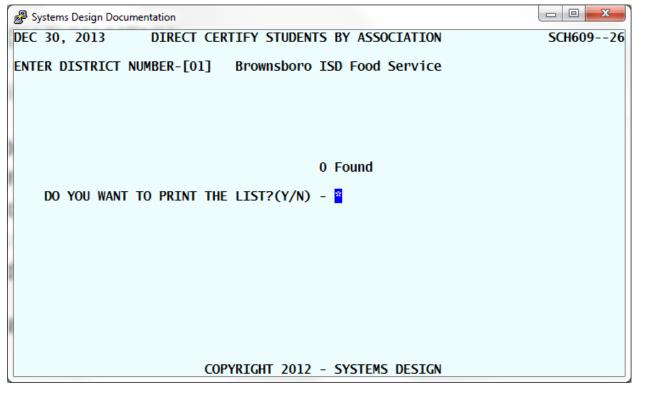
6.10.9 FIELD-[\*\*]

6.10.10 ALL OK?(YNCML)-[\*]

# 10/11/2017 7 Certifying Students Based on Association by Application

Students marked DCE (Direct Certified Extended) have their Student Masterfile Record updated with field 32 D/C copied from the qualifying student, 07 Meal Status is changed to F, today's date is recorded in field 09 and the qualifying student's Student ID is put in field 27 ASSOC D/CERT# so we know on which basis this student was qualified as DCE.

- 7.1 **Select** (L) = LUNCH APPLICATION MENU
- 7.2 Select 98 = DIRECT CERTIFICATION MENU
- 7.3 Select 1 = D/C BY ASSOCIATION MENU
- 7.4 **Select () (1)** = ASSOCIATION BY APPLICATIONS
- 7.5 The system will check if any students qualify to have Direct Certification benefits extended to them based on a student who has been approved on this year's Direct Certification list and was on the same Free or Reduced Price Meal Application entered into the system.
- 7.6 Once the search is complete a count of the qualified students is displayed.



# 7.7 If no qualified students are found, then you may exit the program by typing $\mathbb{N}$

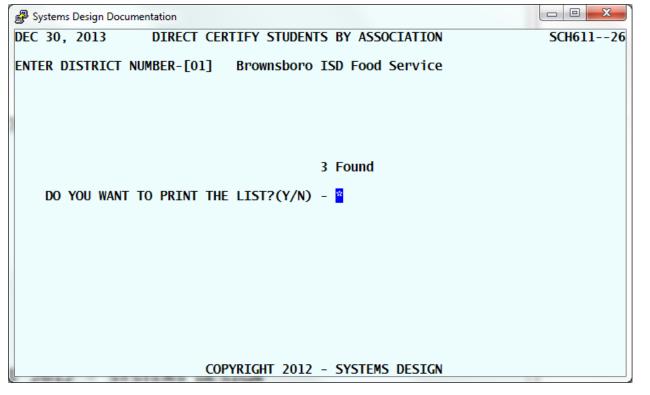
7.8 To print a list of the qualified students, type A and Specify your printer # and confirm it.

7.9 DO YOU WANT TO UPDATE THE SELECTED STUDENTS?(Y/N) - \* type Y to mark the qualified students as DCE.

# 10/11/2017 8 Certifying Students Based on Matching PEIMS Address

Students marked DCE (Direct Certified Extended) have their Student Masterfile Record updated with field 32 D/C copied from the qualifying student, 07 Meal Status is changed to F, today's date is recorded in field 09 and the qualifying student's Student ID is put in field 27 ASSOC D/CERT# so we know on which basis this student was qualified as DCE.

- 8.1 **Select** A = LUNCH APPLICATION MENU
- 8.2 Select 98 = DIRECT CERTIFICATION MENU
- 8.3 Select (1)(4) = D/C BY ASSOCIATION MENU
- 8.4 **Select (0) (2)** = ASSOCIATION BY PEIMS ADDRESS
- 8.5 The system will check if any students qualify to have Direct Certification benefits extended to them based on a student who has the exact same PEIMS address.
- 8.6 Once the search is complete a count of the qualified students is displayed.



- 8.7 If no qualified students are found then you may exit the program by typing  $\mathbb{N}[\mathbb{N}]$
- 8.8 To print a list of the qualified students type 🖄 and Specify your printer # and confirm it.

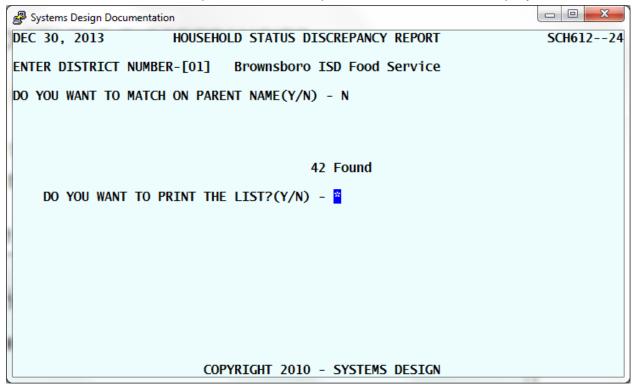
8.9 DO YOU WANT TO UPDATE THE SELECTED STUDENTS?(Y/N) - \* type Y to mark the qualified students as DCE.

#### 10/11/2017 9 Household Status Discrepancy Report

- 9.1 Select (L) = LUNCH APPLICATION MENU
- 9.2 Select 9 = DIRECT CERTIFICATION MENU
- 9.3 Select (1)(4) = D/C BY ASSOCIATION MENU
- 9.4 **Select** 9.4

DO YOU WANT TO MATCH ON PARENT NAME(Y/N) - \*

- 9.6 The system will check if any students have non-matching Meal Status who reside at the exact same PEIMS address.
- 9.7 Once the search is complete a count of questionable records is displayed.



- 9.8 To print a list of the questionable records type (2), Specify your printer # and confirm it; otherwise type (2).
- 9.9 The system will produce a report of any students who do not have the same Meal Status in a household. Review the report to determine if you can extend benefits. The student on the left has a lesser benefit than the student on the right. The only students we expect to see on this list is if you have a Foster Student and the guardian's children are either at a Reduced or Paid status. It is up to the Child Nutrition Department to determine if benefits may be extended.

#### 10/11/2017 **10 Direct Certification List**

- 10.1 Select APPLICATION MENU
- 10.2 **Select (D) (B)** = DIRECT CERTIFICATION MENU
- 10.3 **Select O A** = DIRECT CERT LIST, BY CAMPUS
- 10.4 **Specify** your printer # and **confirm** it.
- 10.5 ENTER CAMPUS TO PRINT **press** for All Campuses.
- 10.6 ENTER PRINT ORDER: [\*] = ALPHA ONLY. This will reduce the number of pages printed in those months where only a few students are added to a campus.
- 10.7 ENTER DATE CERTIFIED: \*\*\*\*\* Enter the date used in step 14.10. DO NOT press for you will get a listing of ALL students added this year instead of those just added today.
- 10.8 SELECT GROUP: [\*] 5=ALL DC STUDENTS
- 10.9 ALL OK?(YNC)-[\*]
- 10.10 DISPLAY TYPE OF ACCTS--[\*] [3] = ALL ACCTS. We want both Active and Inactive accounts so we have a record of those accounts we added. We include Inactive in the event they re-enroll so they will start receiving the benefit immediately.

10.11 ALL OK?(YNC)-[\*]

# 10/11/2017 11 Print Direct Certification Letters

This program will only print letters for families who have at least one new D/C students who were not already Free.

- 11.1 **Select**  $\square$  = LUNCH APPLICATION MENU
- 11.2 **Select (D) (B)** = DIRECT CERTIFICATION MENU
- 11.3 **Select** 1 = D/C LETTERS ONE PER ADDRESS
- 11.4 **Specify** your printer # and **confirm** it.

11.5 ENTER THE LETTER RUN DATE--[\*\*\*\*\*\*] press for today's date.

11.6 INCLUDE INACTIVE STUDENTS?(Y/N) \*

- 11.7 SELECT DISTRICT OR INDIVIDUAL PRINT [\*\*] . = PRINT LETTERS FOR THE DISTRICT
- 11.8 ENTER DATE OF CERTIFICATION TO PRINT [\*\*\*\*\*\* ] Enter the date used in step 14.10. DO NOT press [ or you will get letters for ALL students added this year instead of those just added today.

#### 11.9 ALL OK?(YNC)-[\*] 🏼

While the program is running the number of qualifying students displays on the screen and the number of letters printed displays below. The program immediately exits when it is finished.