

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.

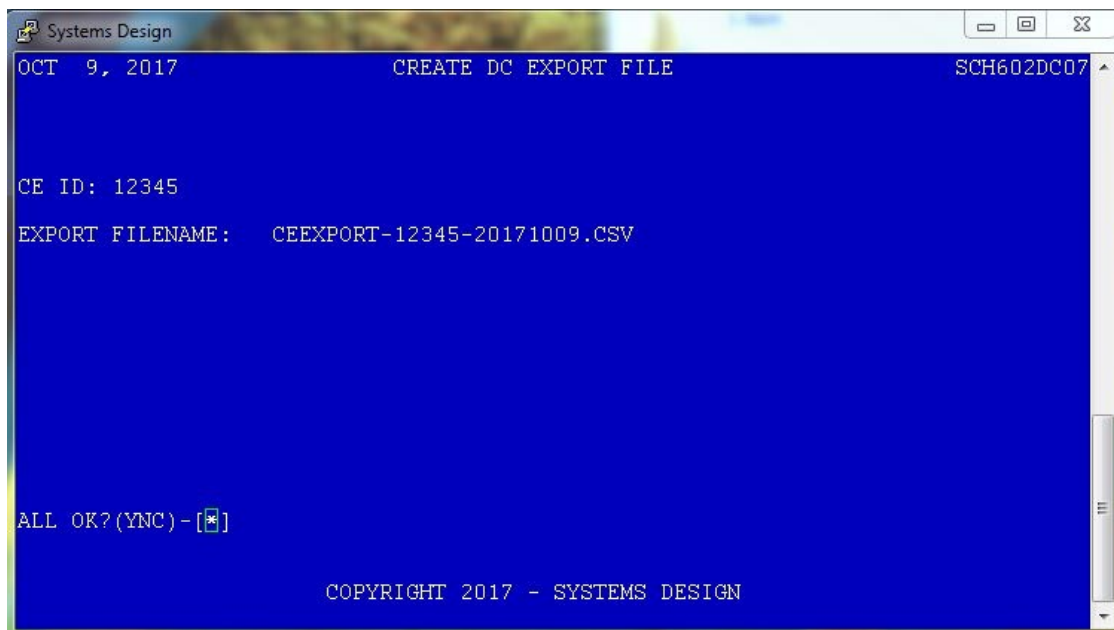
**Notice that in the pictures below I have set my personal PC to show the file extensions (.xls, .CSV, etc). This may not be the case for your specific PC and that is okay. I just set mine up this way to provide a better visual.**

## 1 Creating the Direct Certification Export File

1.1 Select   = LUNCH APPLICATION MENU

1.2 Select   = DIRECT CERTIFICATION MENU

1.3 Select   = CREATE DIRECT CERT EXPORT FILE



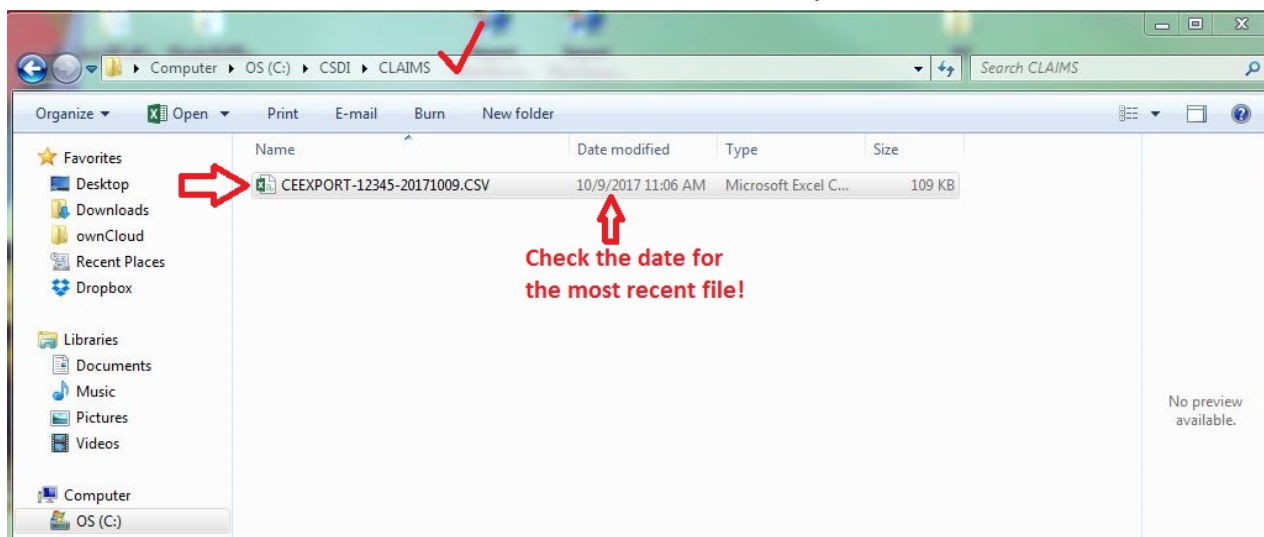
1.4 Type  to Export the CEEXPORT-CEID-DATE.CSV file to your **C:\CSD\CLAIMS** folder.

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:\CSD\CLAIMS** folder). We now need to change the file type as per TDA Instructions.

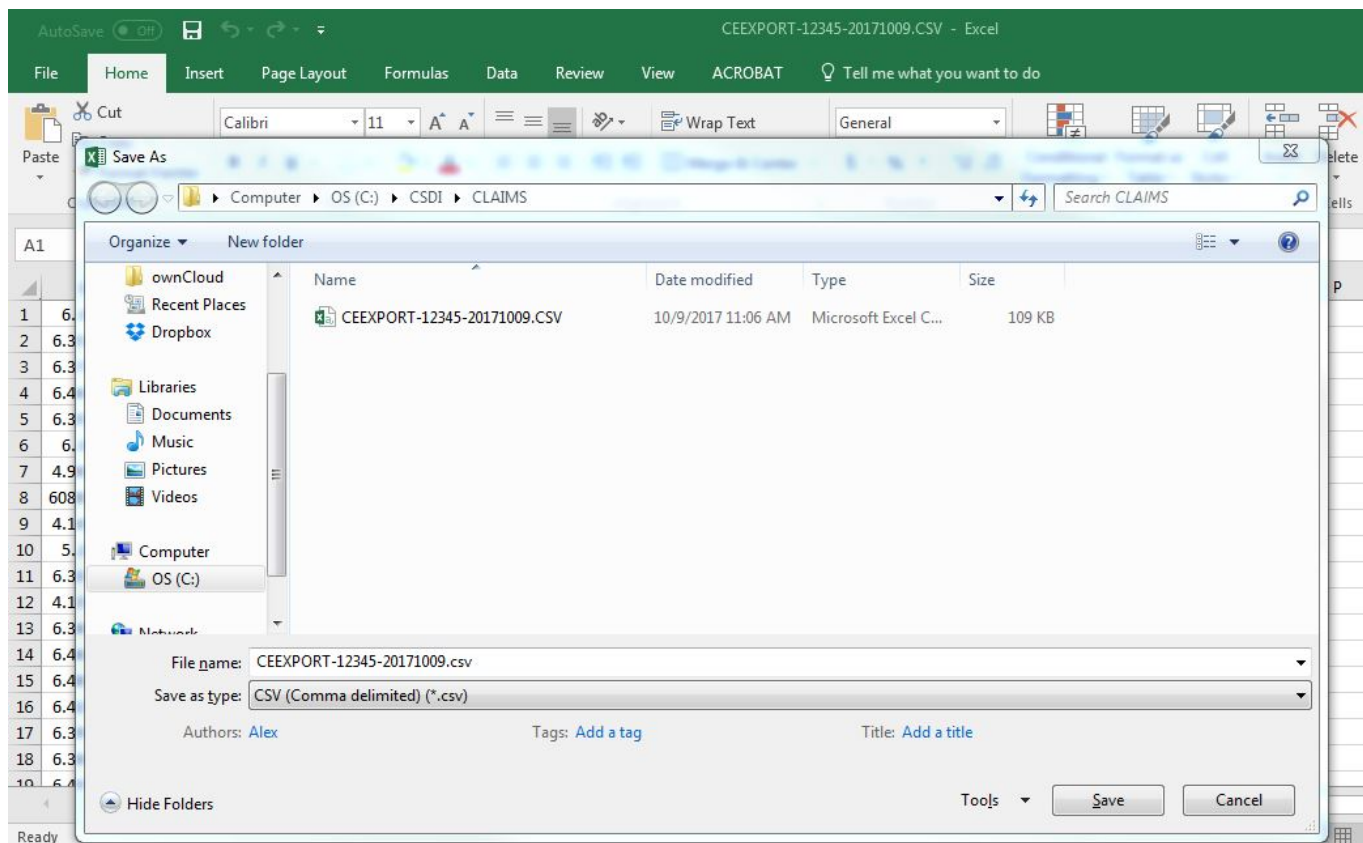
## 2 Changing the Direct Certification Export File Type.

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.



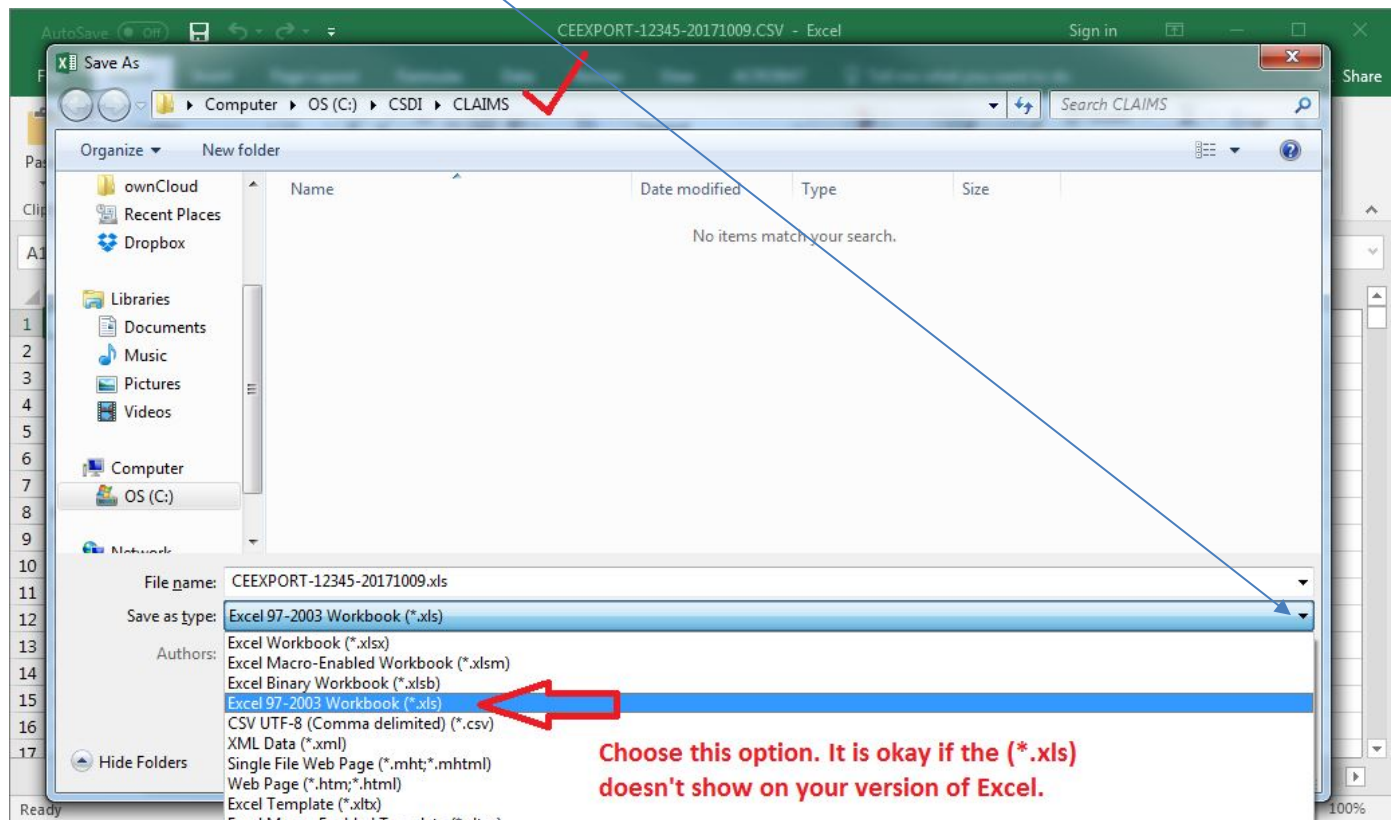
2.2 With the file open in Excel, be sure to click on **Enable Editing** at the top if prompted.

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

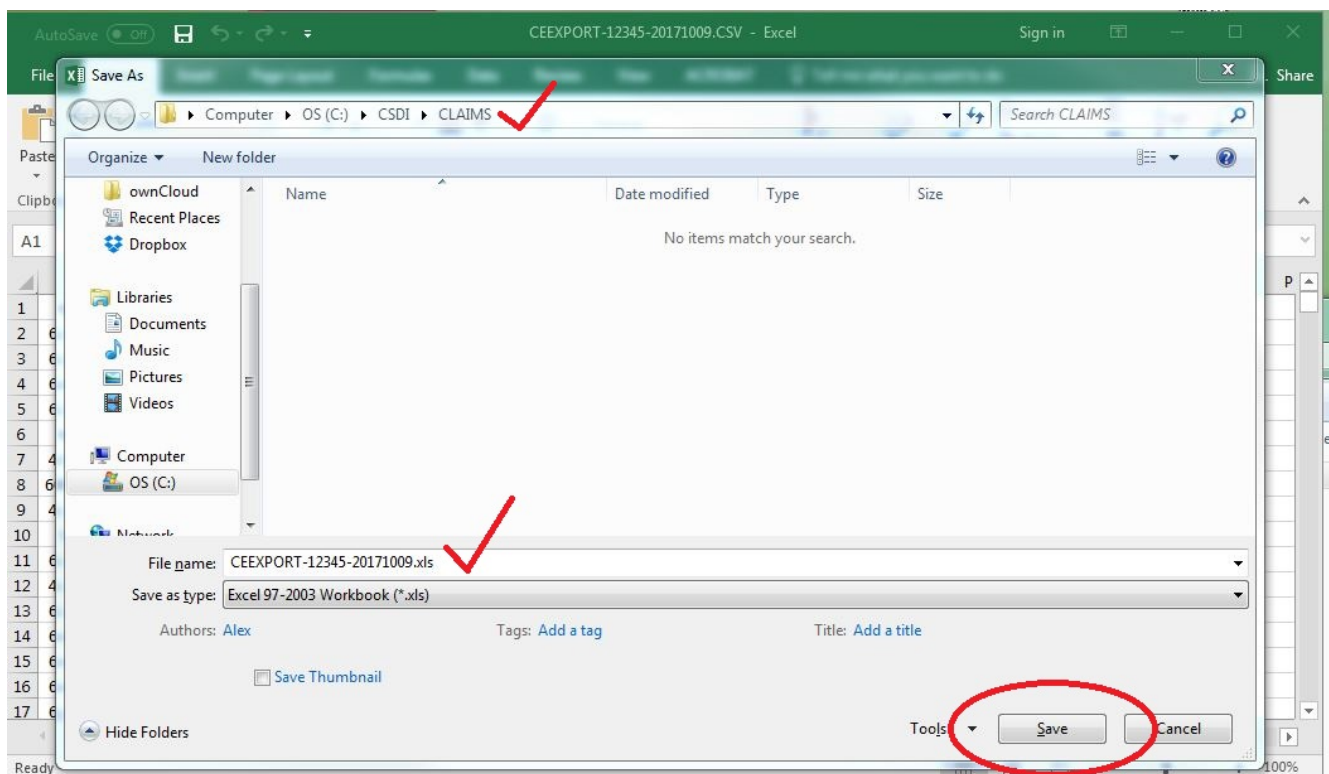


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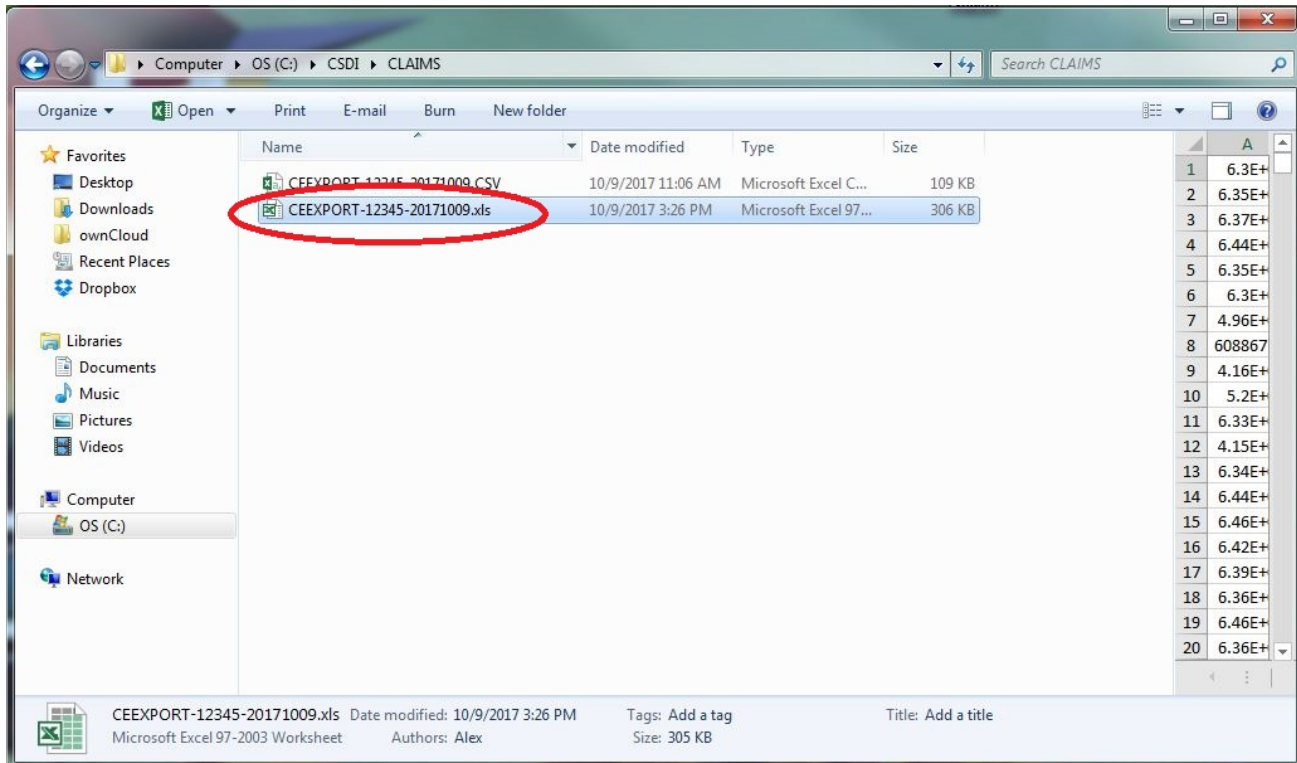
2.4 **Click** the down arrow by the “Save as type:” and select **Excel 97-2003 Workbook**. TDA is requiring the file to be a .xls or .xlsx.



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



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.





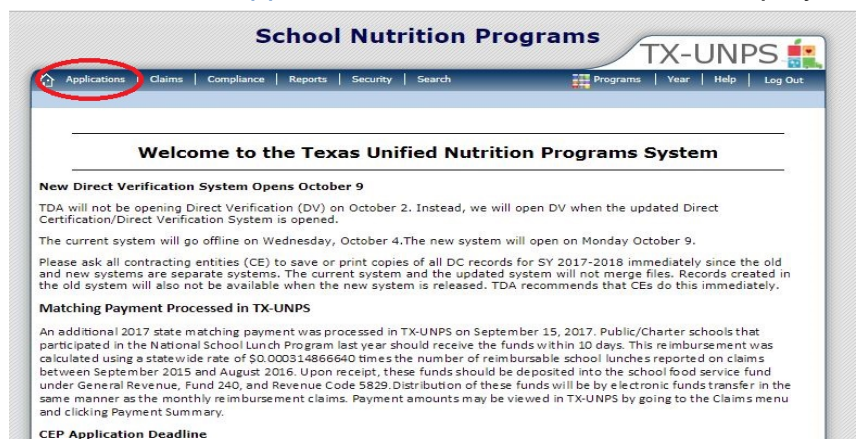
### 3 Uploading the CE Import File

#### 3.1 Login to the TX-UNPS system

#### 3.2 If presented with the Programs screen, **select** [School Nutrition Programs](#).



#### 3.3 On the blue menu bar, **select** [Applications](#) and the menu screen displays.

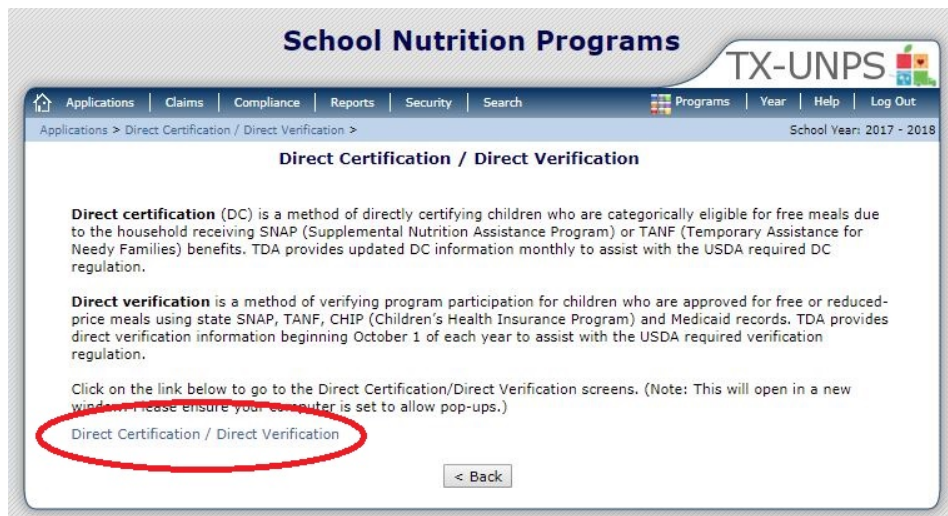


#### 3.4 **Select** [Direct Certification/Direct Verification](#) and a new page displays.

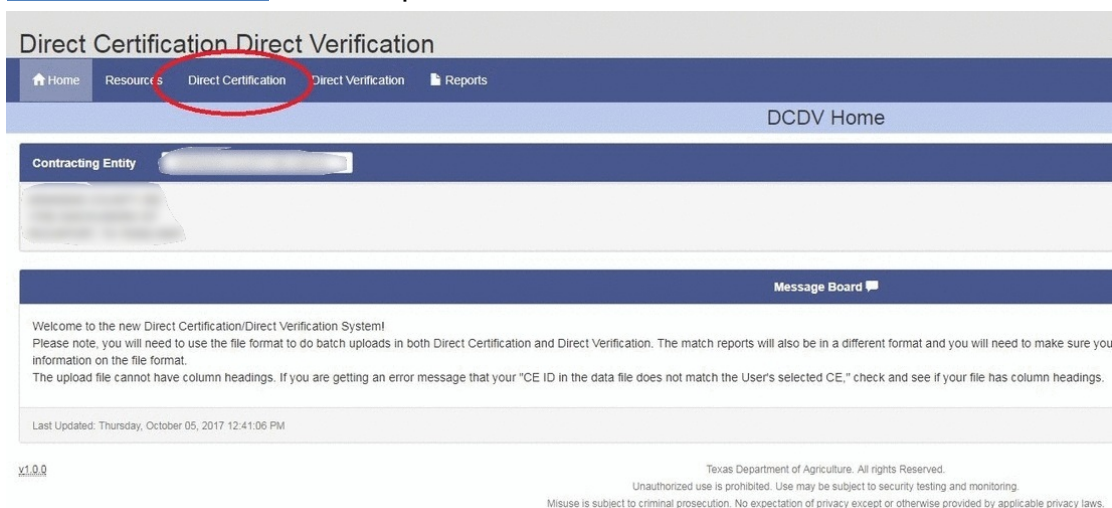


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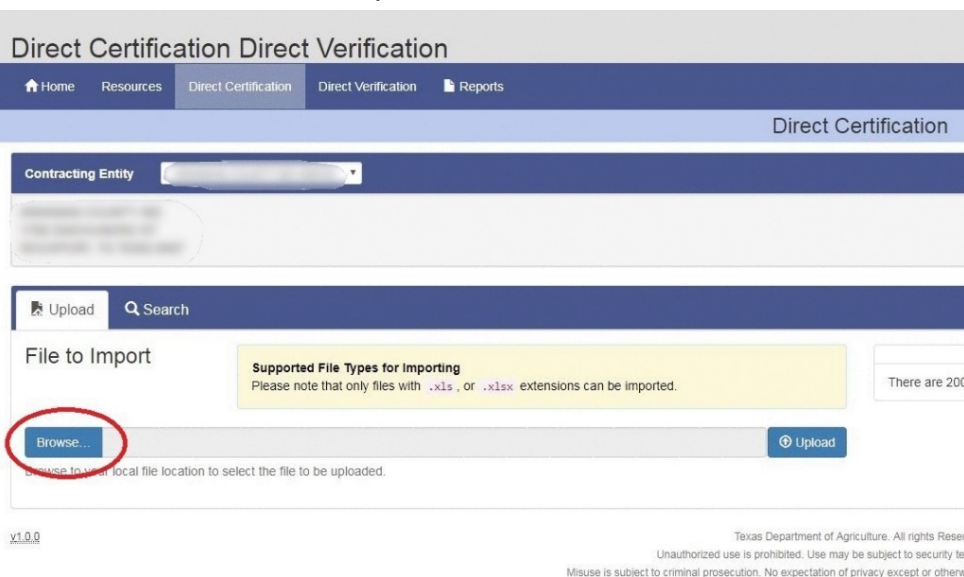
3.5 **Select** [Direct Certification/Direct Verification](#) and the new Direct Certification page loads. You will have to log in again to access the new Direct Certification webpage.



3.6 **Click** [Direct Certification](#) on the top menu bar.

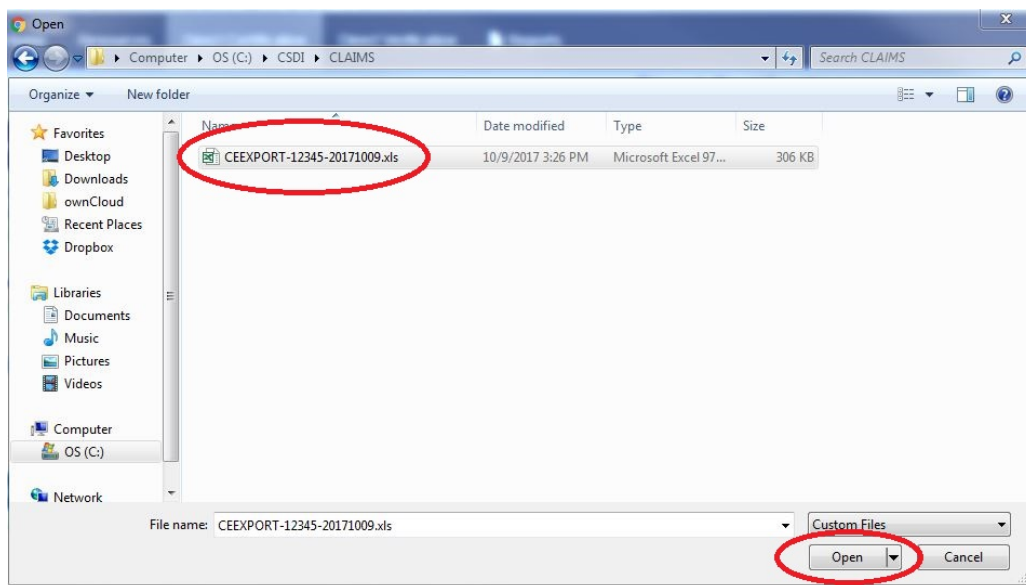


3.7 **Select** [Browse](#) to find the .xls file to upload.



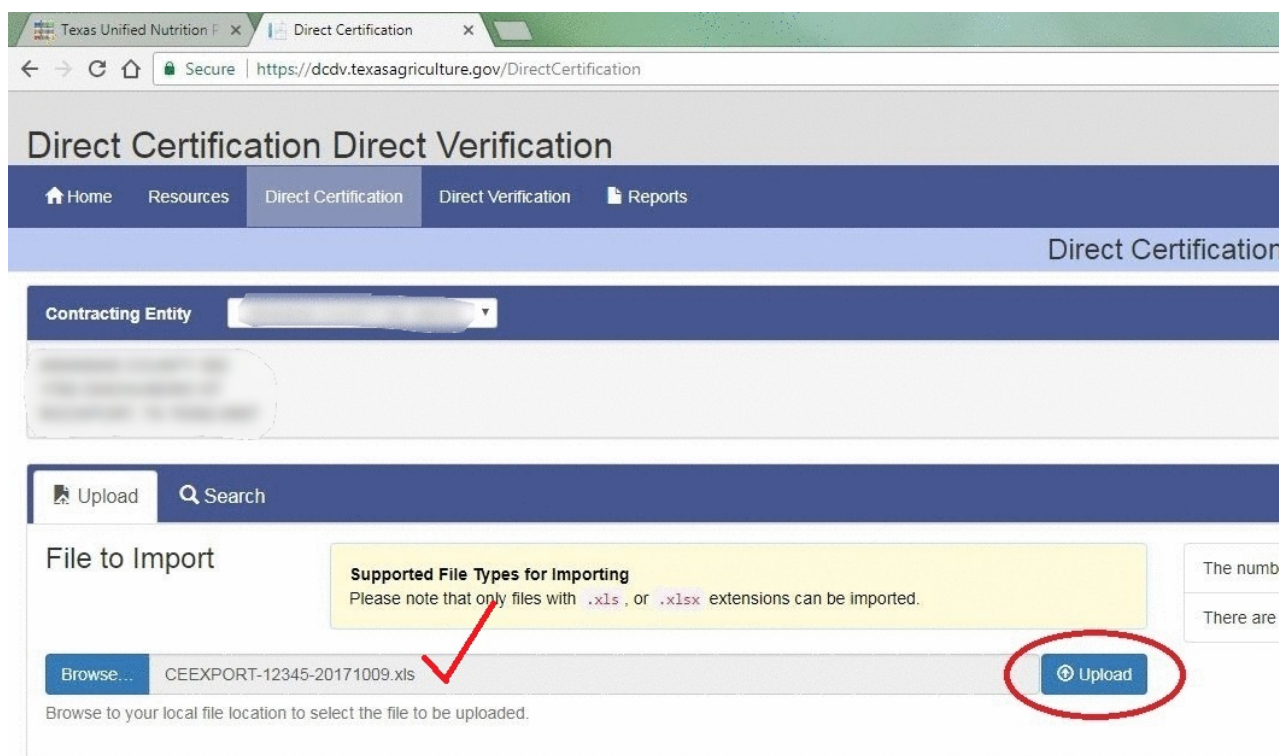
3.8 You will **browse** to C:\CSDI\CLAIMS folder if you use our recommended configuration.

- **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**.



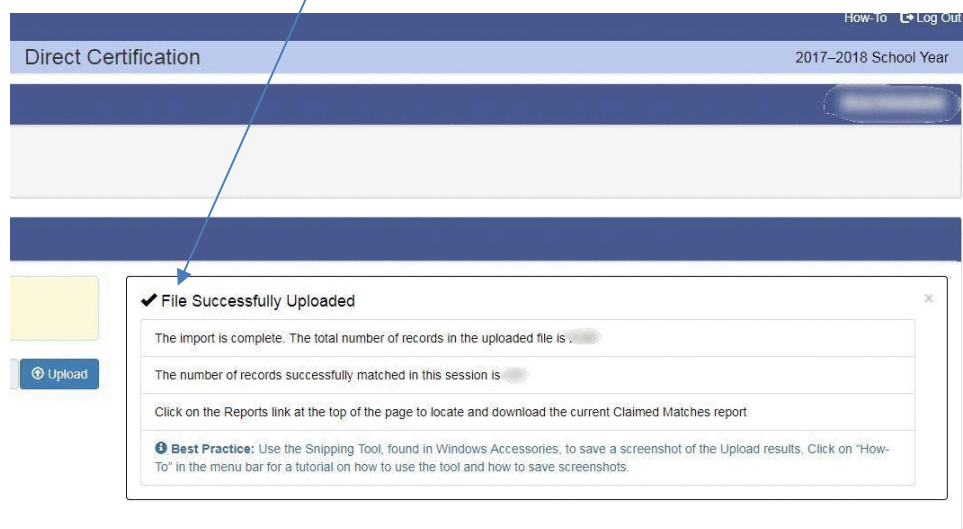
3.9 Select Upload. The process takes anywhere from 10-30 seconds.

**DO NOT click Upload more than once!**

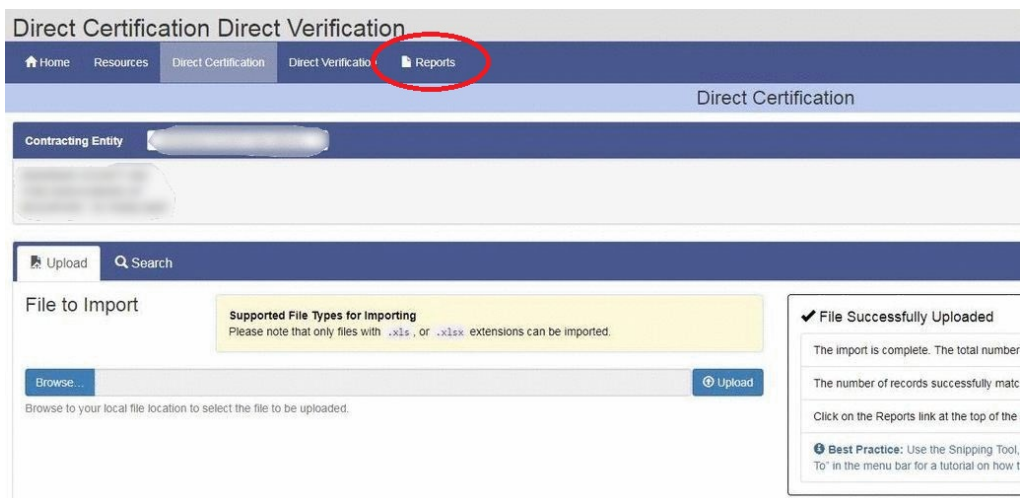




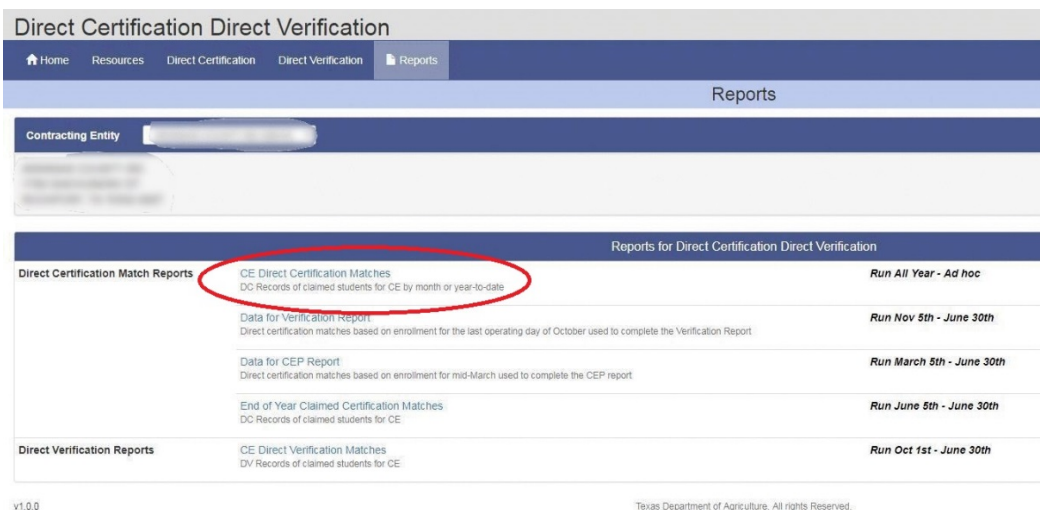
3.10 There will be a delay while the file is being processed. If you have had a successful upload, the screen will tell you how many records were in the file and how many were successfully matched. You should get a “File Successfully Uploaded” message like the image below.



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

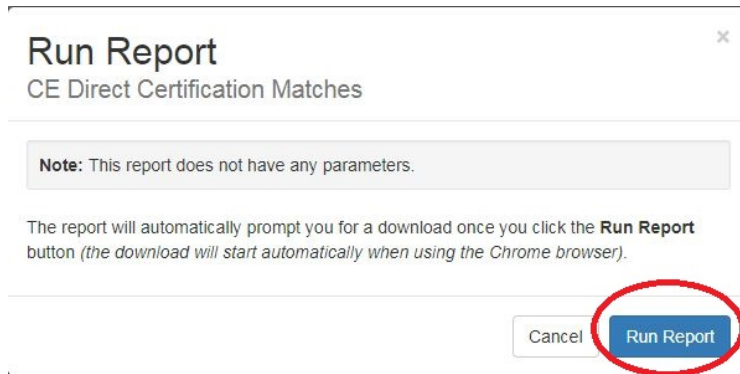


3.12 Click on CE Direct Certification Matches.

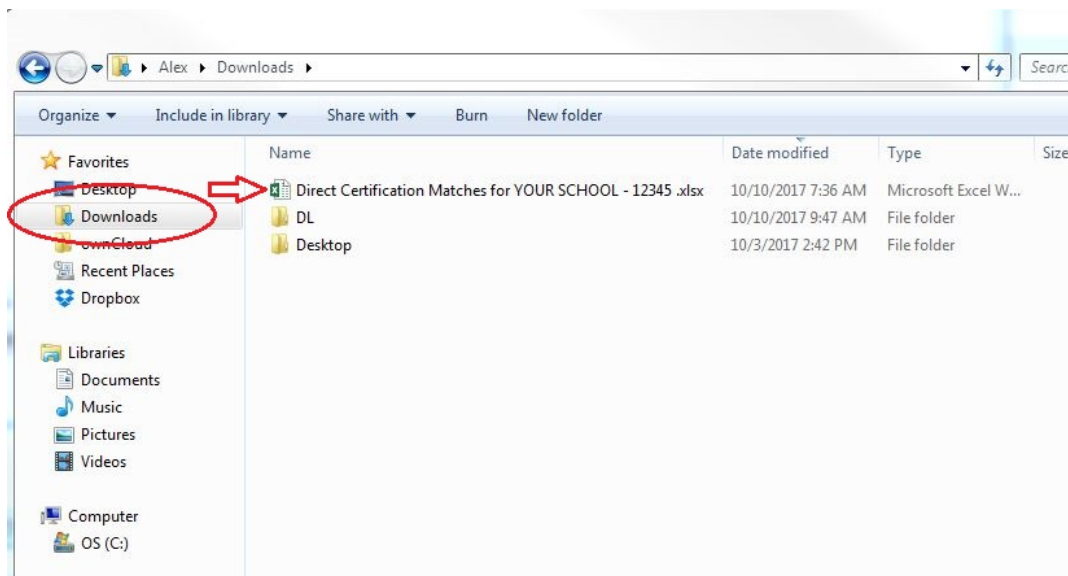




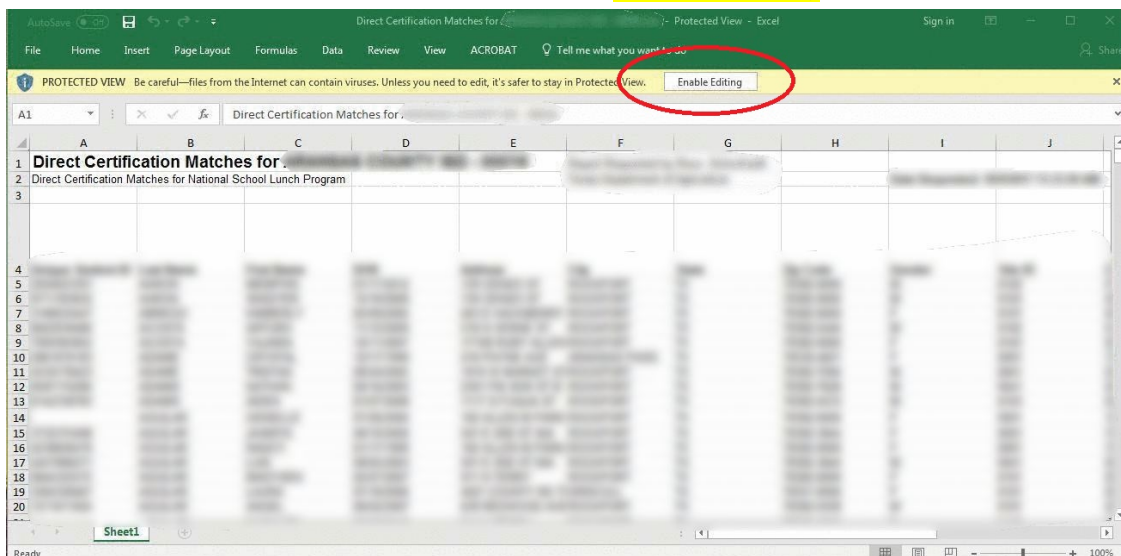
3.13 **Click** on Run Report. An Excel file will download to your PC's default location.




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.



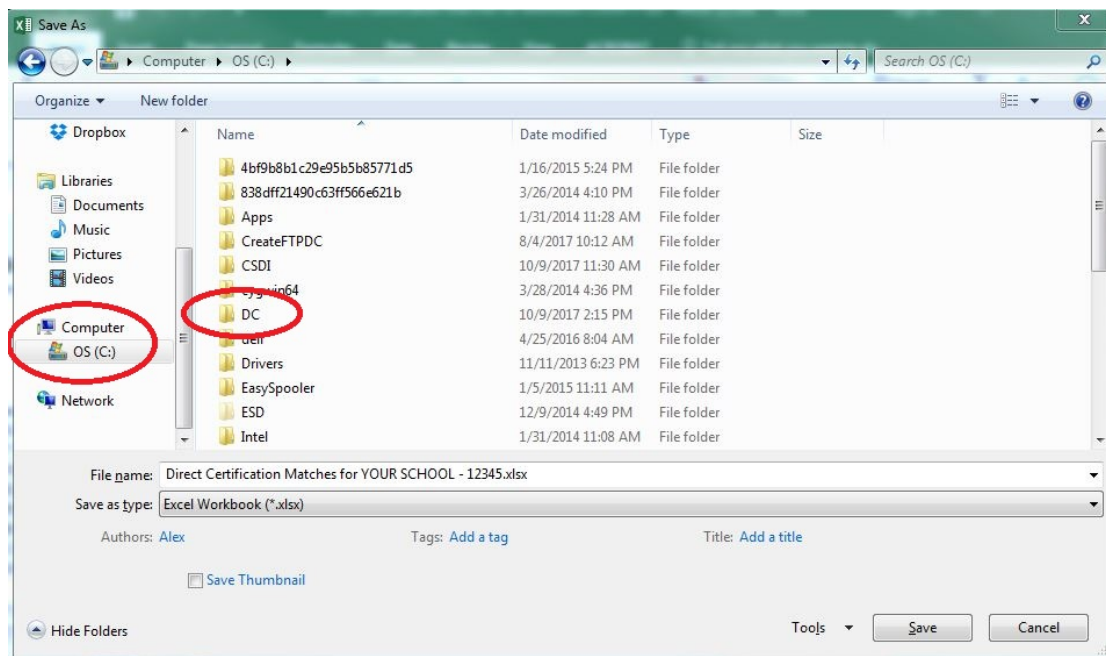
3.15 With the file open in Excel, be sure to click on "Enable Editing" at the top if prompted.



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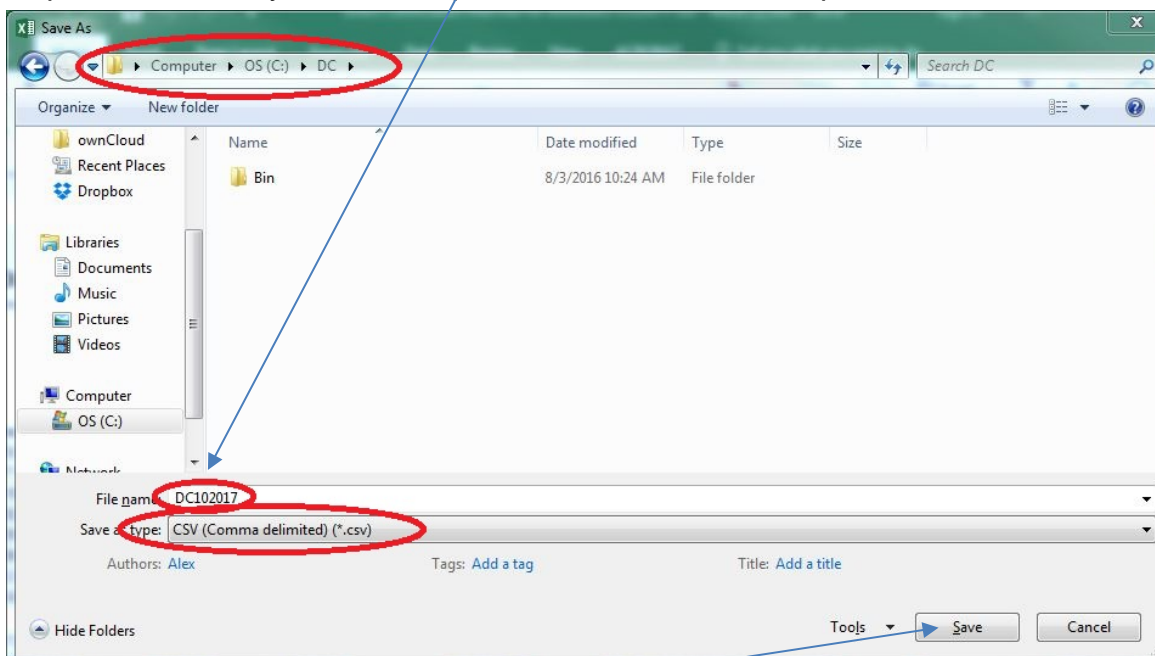
3.16 Press  on your keyboard to bring up the Save As dialog box.

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.



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.



3.20 Click Save then you can close Excel (click the X on the top right).

## 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.

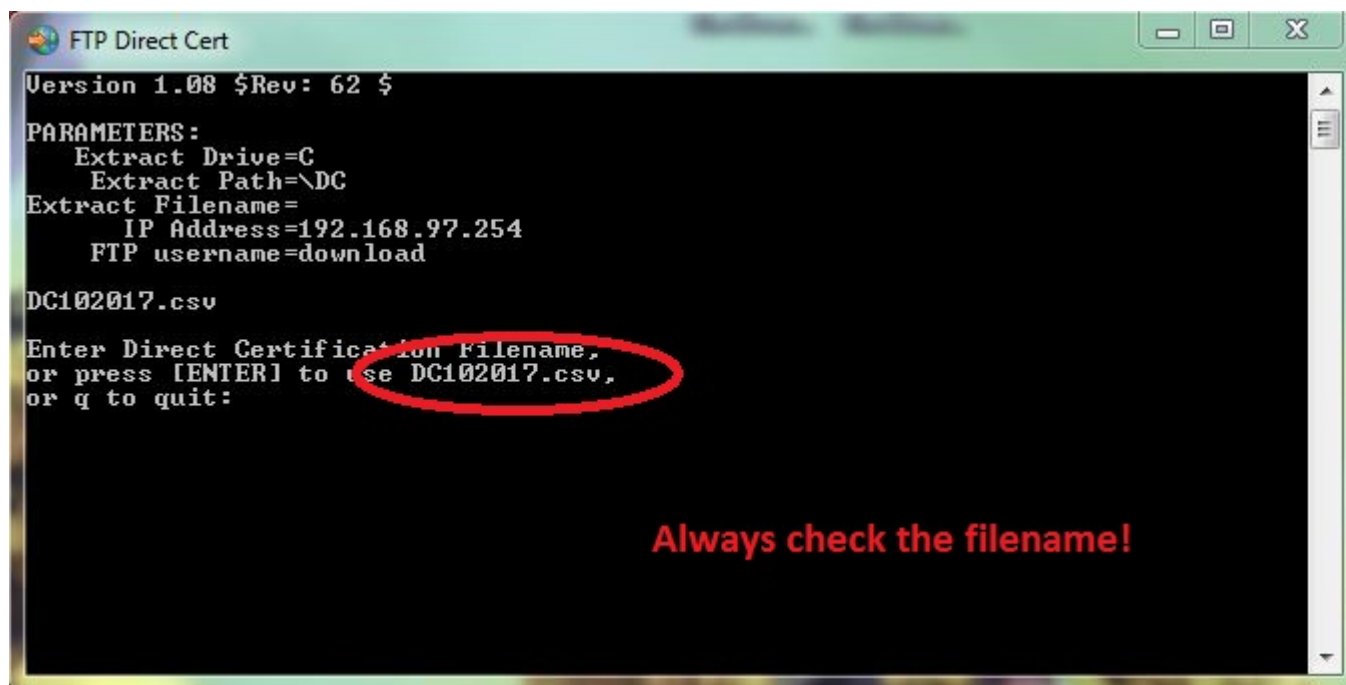
4.2 **Click** on the Windows **Start** button in the lower left corner of your screen.




4.3 **Click** **Programs** or **All Programs**.

4.4 **Click** the **CSDI** folder.


4.5 **Click** **FTP Direct Cert**.

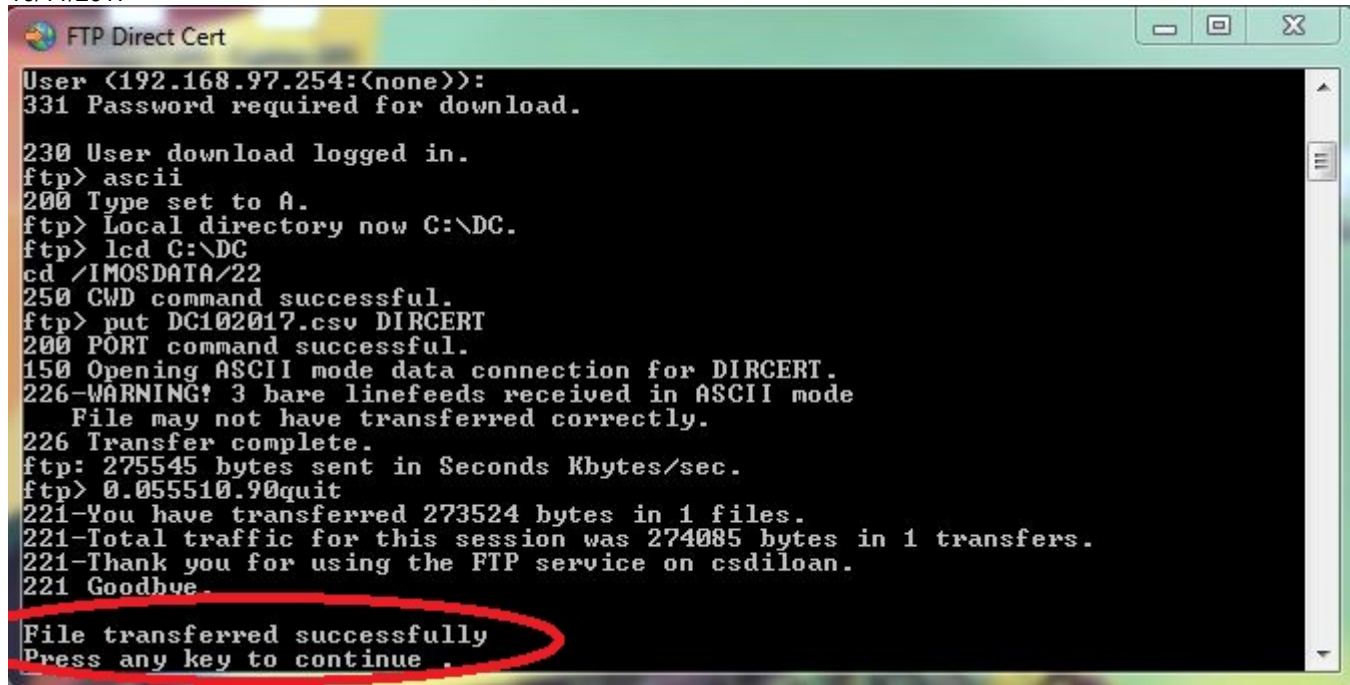
4.6 A window opens and the next-to-last line should specify the current file name.



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.



```
FTP Direct Cert
User (192.168.97.254:(none)):
331 Password required for download.

230 User download logged in.
ftp> ascii
200 Type set to A.
ftp> Local directory now C:\DC.
ftp> lcd C:\DC
cd /IMOSDATA/22
250 CWD command successful.
ftp> put DC102017.csv DIRCERT
200 PORT command successful.
150 Opening ASCII mode data connection for DIRCERT.
226-WARNING! 3 bare linefeeds received in ASCII mode
File may not have transferred correctly.
226 Transfer complete.
ftp: 275545 bytes sent in Seconds Kbytes/sec.
ftp> 0.055510.90quit
221-You have transferred 273524 bytes in 1 files.
221-Total traffic for this session was 274085 bytes in 1 transfers.
221-Thank you for using the FTP service on csdiloan.
221 Goodbye.

File transferred successfully
Press any key to continue .
```

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



## 5 Processing the Direct Certification file.

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

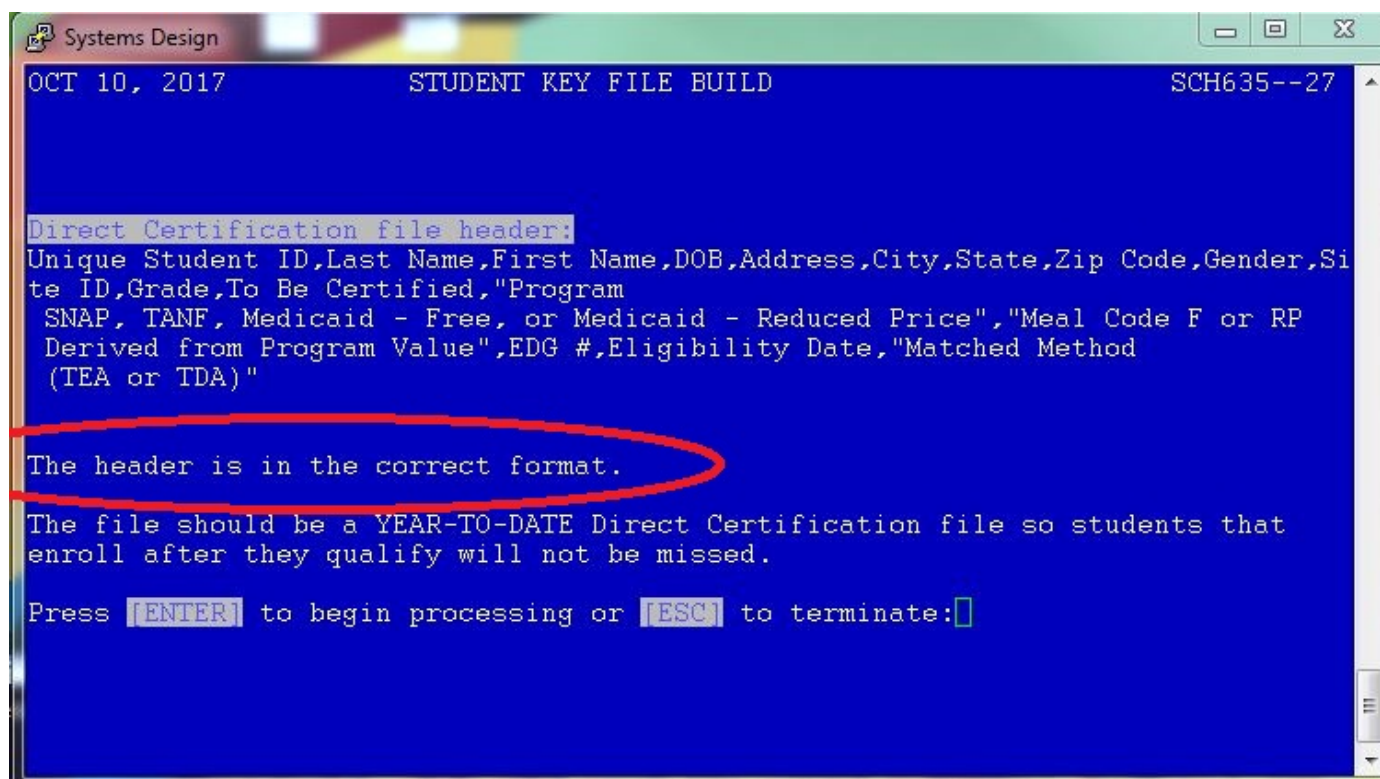
5.1 **Select**  = LUNCH APPLICATION MENU

5.2 **Select**  = DIRECT CERTIFICATION MENU

5.3 **Select**  = 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:



```

Systems Design
OCT 10, 2017      STUDENT KEY FILE BUILD      SCH635--27

Direct Certification file header:
Unique Student ID, Last Name, First Name, DOB, Address, City, State, Zip Code, Gender, Site ID, Grade, To Be Certified, "Program
SNAP, TANF, Medicaid - Free, or Medicaid - Reduced Price", "Meal Code F or RP
Derived from Program Value", EDG #, Eligibility Date, "Matched Method
(TEA or TDA)"




The header is in the correct format.

The file should be a YEAR-TO-DATE Direct Certification file so students that
enroll after they qualify will not be missed.




Press [ENTER] to begin processing or [ESC] to terminate:
  
```

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**  to begin processing or **press**  to exit.

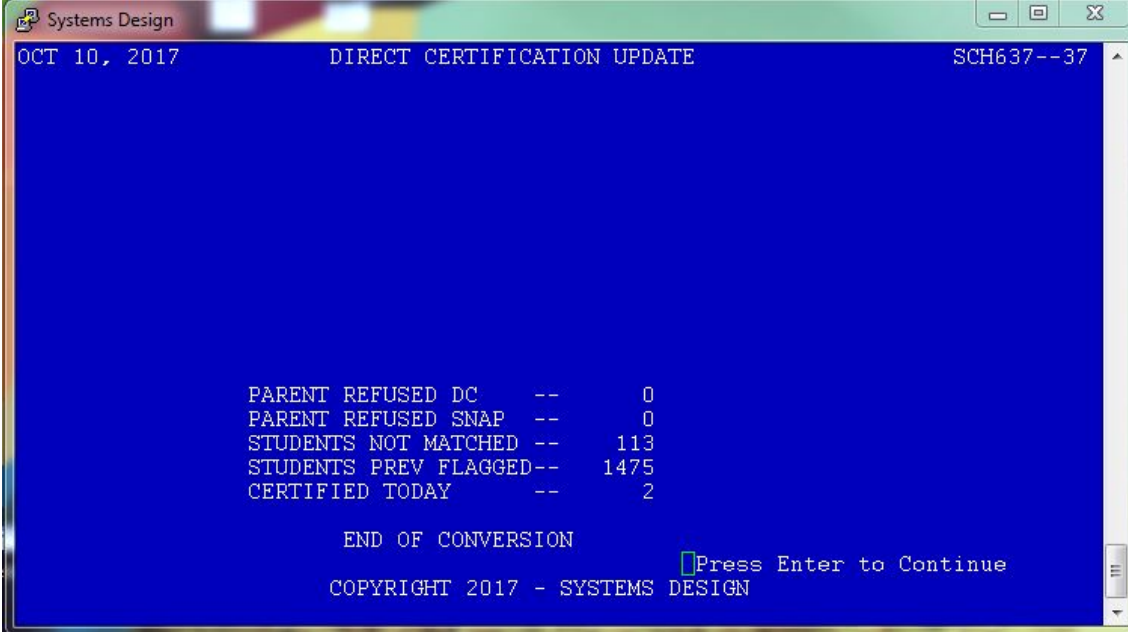
5.8 **Type**  to build the cross-reference and continue; otherwise **type**  or  to terminate.

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**  to proceed; otherwise **type**  to reenter the certification date or **type**  to terminate and exit.

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5.11 After processing, statistics will display on the screen recapping the results of the run.



```
OCT 10, 2017          DIRECT CERTIFICATION UPDATE          SCH637--37

PARENT REFUSED DC    --      0
PARENT REFUSED SNAP  --      0
STUDENTS NOT MATCHED --    113
STUDENTS PREV FLAGGED--  1475
CERTIFIED TODAY      --      2

END OF CONVERSION
Press Enter to Continue
COPYRIGHT 2017 - SYSTEMS DESIGN
```

5.11.1 Press  and a copy of the statistics will print.

## 6 Processing the Direct Certification Exceptions


6.1 These are the students that did not match automatically. TDA is now matching based on name and birthdate 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.

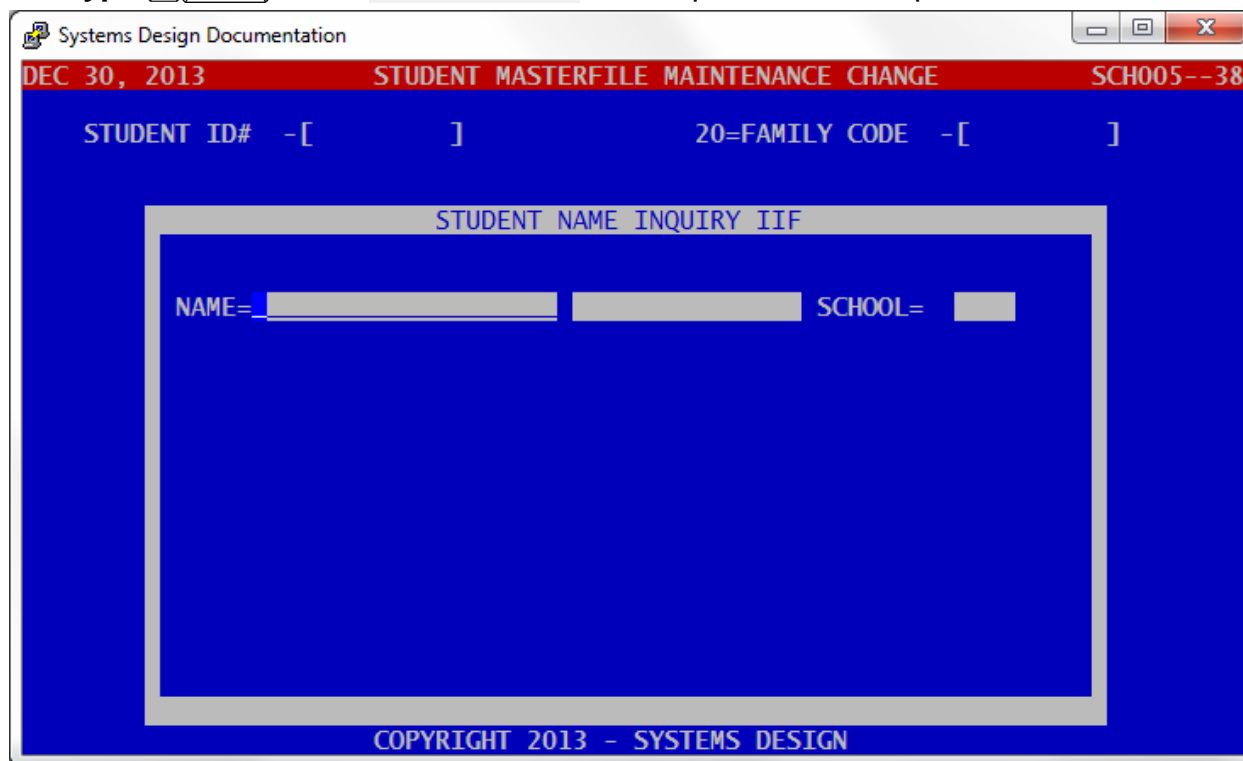
You will ignore any report lines which have **Refused** in the **D/C SNAP** column as they are informational to remind you those student's parents have refused benefits.

6.2 **Select**  = LUNCH APPLICATION MENU

6.3 **Select**  = STUDENT MASTERFILE MAINTENANCE


6.4 **FUNCTION** [ \* ]  = CHANGE

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



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**.

Systems Design Documentation

DEC 30, 2013 STUDENT MASTERFILE MAINTENANCE CHANGE SCH005--37





STUDENT ID# -[ ] 20=FAMILY CODE -[ ]

STUDENT NAME INQUIRY IIF

NAME=BROWN A SCHOOL=


|                      |          |      |      |    |
|----------------------|----------|------|------|----|
| *BROWN, ALEXANDRIA J | 08/28/02 | 8328 | 0101 | 05 |
| *BROWN, ALIYAH P     | 09/01/95 | 7571 | 0001 | 12 |
| *BROWN, BLAKE L      | 05/22/08 | 8371 | 0101 | KG |
| BROWN, BRYAN L       | 09/23/97 | 7187 | 0001 | 09 |
| BROWN, JAYCIE L      | 07/21/96 | 2105 | 0001 | 12 |
| BROWN, JESUS A       | 10/05/99 | 6827 | 0001 | 07 |
| BROWN, MATTHEW G     | 01/16/97 | 3077 | 0001 | 11 |
| BROWN, REBECCA       |          | 711  | 0101 | E  |
| BROWN, THOMAS W      | 04/26/00 | 2364 | 0001 | 08 |
| *BRYANT, ASHLEY N    | 09/27/93 | 7418 | 0001 | 12 |



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6.9 The list displays showing the closest matches in the system. You may use the  and  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 [ \* ]  or  or  or  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- [ \*\* ]  



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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) - [ \* ] 

## 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**   = LUNCH APPLICATION MENU

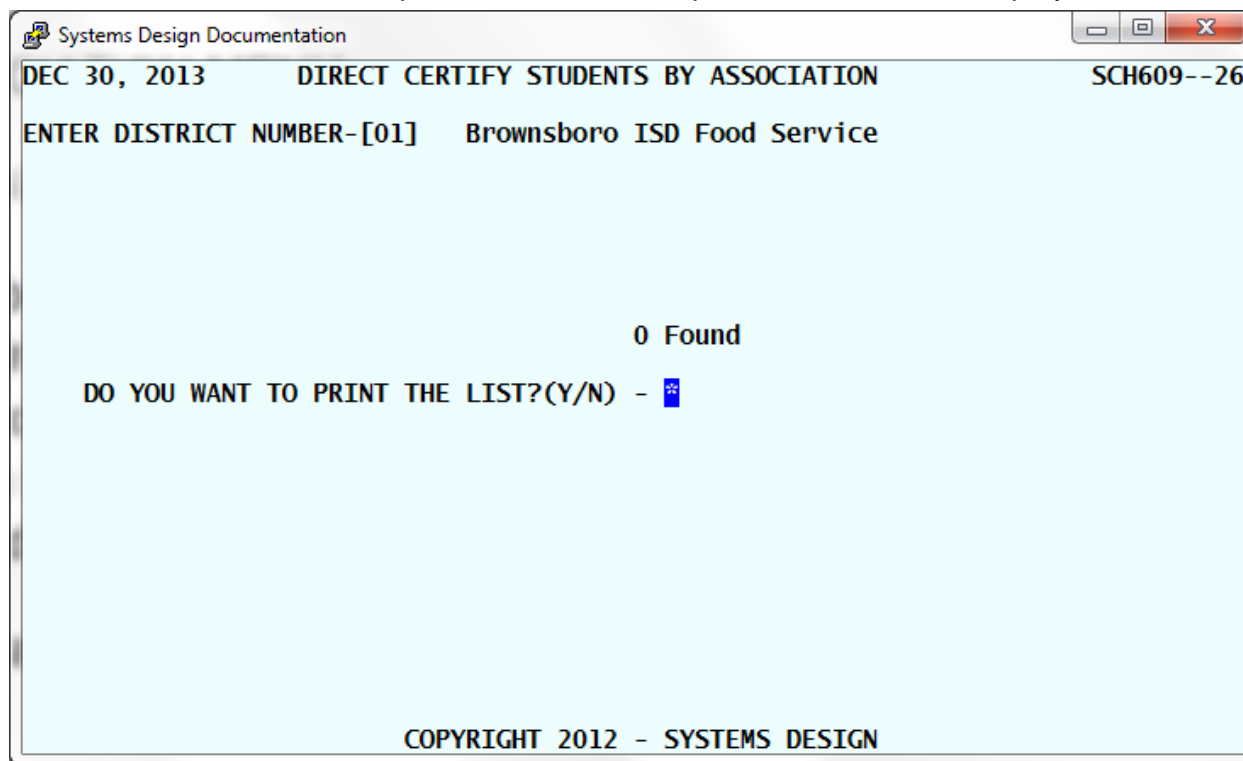
7.2 **Select**   = DIRECT CERTIFICATION MENU

7.3 **Select**   = D/C BY ASSOCIATION MENU

7.4 **Select**   = 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   .

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

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

## 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**   = LUNCH APPLICATION MENU

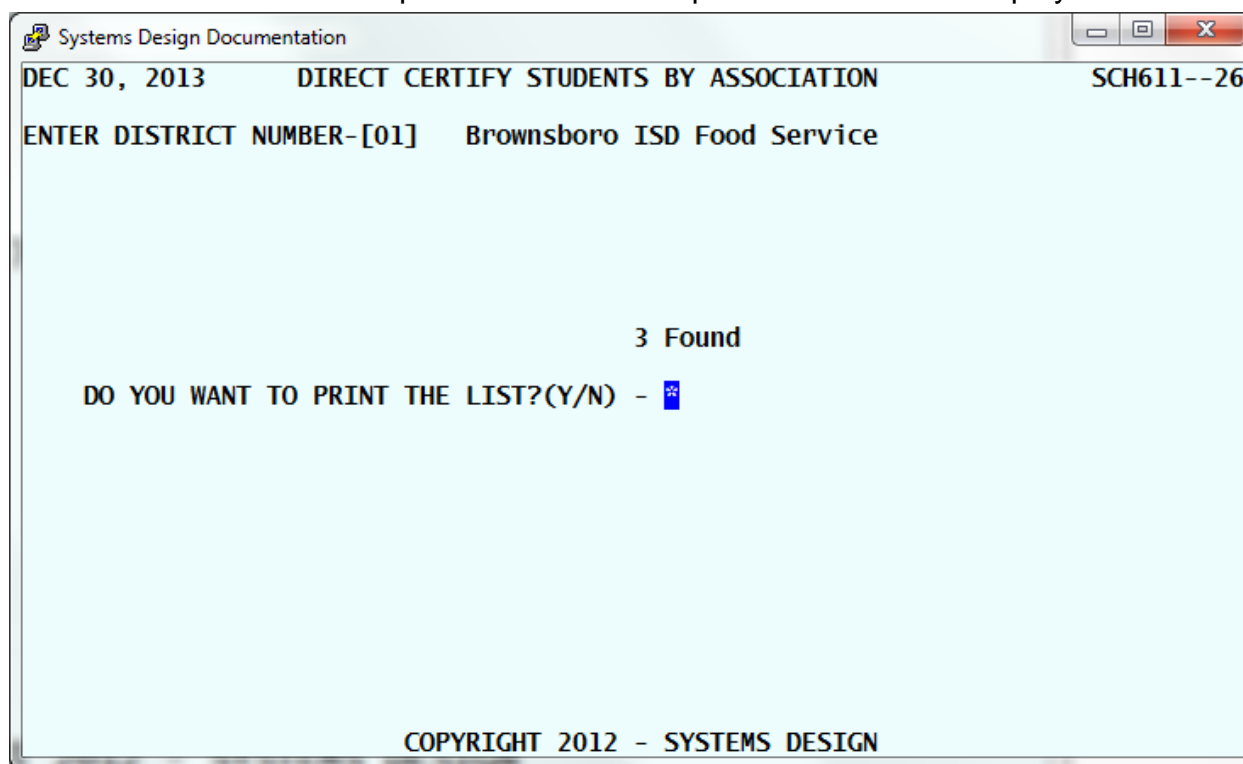
8.2 **Select**   = DIRECT CERTIFICATION MENU

8.3 **Select**   = D/C BY ASSOCIATION MENU

8.4 **Select**   = 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   .

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  to mark the qualified students as DCE.

## 9 Household Status Discrepancy Report

9.1 Select **L** **A** = LUNCH APPLICATION MENU

9.2 Select **0** **8** = DIRECT CERTIFICATION MENU

9.3 Select **1** **4** = D/C BY ASSOCIATION MENU

9.4 Select **0** **3** = HOUSEHOLD STATUS DISCREPANCIES

**9** **7** **5** DO YOU WANT TO MATCH ON PARENT NAME(Y/N) - \* **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.

The screenshot shows a window titled "Systems Design Documentation" with a light blue background. The text inside the window is as follows:

```

DEC 30, 2013      HOUSEHOLD STATUS DISCREPANCY REPORT      SCH612--24
ENTER DISTRICT NUMBER-[01]  Brownsboro ISD Food Service
DO YOU WANT TO MATCH ON PARENT NAME(Y/N) - N

                                42 Found

DO YOU WANT TO PRINT THE LIST?(Y/N) - N
  
```

At the bottom of the window, it says "COPYRIGHT 2010 - SYSTEMS DESIGN".

9.8 To print a list of the questionable records type **Y**, Specify your printer # and confirm it; otherwise type **N**.

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 Direct Certification List


10.1 **Select**   = LUNCH APPLICATION MENU


10.2 **Select**   = DIRECT CERTIFICATION MENU


10.3 **Select**   = 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  or you will get a listing of ALL students added this year instead of those just added today.

10.8 SELECT GROUP: [ \* ]  = ALL DC STUDENTS

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

10.10 DISPLAY TYPE OF ACCTS-- [ \* ]  = 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) - [ \* ] 

## 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**   = LUNCH APPLICATION MENU



11.2 **Select**   = DIRECT CERTIFICATION MENU


11.3 **Select**   = 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? (Y/N) - [ \* ] 

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.