

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 <a>[<a>[<a>[<a>[<a>]</a>]</a> = DIRECT CERTIFICATION MENU
- 1.3 **Select (D)** = CREATE DIRECT CERT EXPORT FILE



1.4 **Type** I to Export the DCEXPORT-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). 1.6 The new DCEXPORT file should be in the C:\CSDI\CLAIMS folder. Systems Design has already converted the file to be in the correct format for TDA. This is the file we will be uploading to TDA as per their instructions.

|                      | and the second second |                 |         |                   |                                     | L      |      | 23        |
|----------------------|-----------------------|-----------------|---------|-------------------|-------------------------------------|--------|------|-----------|
| Comput               | ter 🕨 OS (C:)         | ► CSDI ► CLAI   | IMS     |                   | - Search CLAIMS                     |        |      | ٩         |
| Organize 🔻 Include i | n library 🔻           | Share with 🔻    | Burn    | New folder        |                                     | •      |      | 0         |
| ☆ Favorites          | ^ Nam                 | · · ·           | -       | Date modified     | Туре                                |        |      |           |
| Desktop              |                       | CEXPORT-12345-2 | 0171109 | 11/9/2017 3:23 PM | Microsoft Excel 97-2003 Worksheet ◀ | $\leq$ |      |           |
| Downloads            |                       |                 |         |                   |                                     |        |      |           |
| 📃 Recent Places      |                       |                 |         |                   |                                     |        |      |           |
| 😌 Dropbox            |                       |                 |         |                   |                                     |        |      |           |
| 🔚 Libraries          | H.                    |                 |         |                   |                                     |        | Sele | ct a file |
| Documents            |                       |                 |         |                   |                                     |        | to p | review.   |
| J Music              |                       |                 |         |                   |                                     |        |      |           |
| Videos               |                       |                 |         |                   |                                     |        |      |           |
|                      |                       |                 |         |                   |                                     |        |      |           |
| Computer             |                       |                 |         |                   |                                     |        |      |           |
| 📷 US (C:)            | + (                   |                 |         | Ш                 |                                     |        | F    |           |
| 1 item               |                       |                 |         |                   |                                     |        |      |           |

#### 11/9/2017 2 Uploading the CE Import File

- 2.1 Login to the TX-UNPS system
- 2.2 On the main Programs screen, select Applications.

|                       | School Nutrition Pro                         | TX-UNPS                          |
|-----------------------|--|----------------------------------|
| Applications   Claims | s   Compliance   Reports   Security   Search | Programs   Year   Help   Log Out |
|                       | Programs                                     |                                  |
|                       | School<br>Nutrition<br>Programs              | Food<br>Distribution<br>Program  |

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

| 🏠 Applications   Claims   Compliance       | Reports Security                   | Search                               | Programs   Year   Help   Log Out              |
|--|------------------------------------|--------------------------------------|---|
| Applications >                             |                                    |                                      | School Year: 2017 - 20                        |
| Item                                       | Description                        |                                      |   |
| Application Portal                         | Access to all pr                   | ogram application                    | s   |
| Application Packet                         | Applications Fo                    | rms (Contracting B                   | Entity and Site)                              |
| Attachment B                               | Policy Statemer<br>Count/Collectio | nt for Free and Re<br>n Procedure(s) | duced-Price Meals, Attachment B: Meal         |
| Second Review of Applications              | FNS-874 report<br>applications.    | for Contracting E                    | ntitys selected to conduct a second review of |
| Verification Report                        | Mandatory Ann                      | ual Verification Re                  | port  |
| Food Safety Inspections                    | Number of Food                     | d Safety Inspection                  | ns by Site                                    |
| Annual Audits                              | Annual Audits                      |                                      |   |
| Financial Report                           | School Food An                     | nual Revenues an                     | d Expenditures Report                         |
| FFVP Application Packet                    | Fresh Fruit and                    | Vegetable Program                    | m Application Forms (SFA and Site)            |
| FFVP Grants                                | Fresh Fruit and                    | Vegetable Program                    | m Grant Information for a specific CE         |
| Summer Nutrition Program Costs             | Total Costs Ass                    | ociated with Opera                   | ating a Summer Nutrition Program              |
| Capital Expenditure Request                | Request for fun                    | ds to purchase ca                    | pital items >= \$5,000                        |
| Community Eligibility Provision            | Enrollment and                     | Eligibility for Com                  | munity Eligibility Provision                  |
| Texas Summer Mandata                       | Summer Nutriti                     | on Programs Inter                    | nt Declaration                                |
| Direct Certification / Direct Verification | Direct Certificat                  | tion / Direct Verific                | cation screens                                |
| Download Forms                             | Forms Available                    | e for Downloading                    |   |

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2.4 Select <u>Direct Certification/Direct Verification</u> and the new Direct Certification page loads.



2.5 TXUNPS may require you to log in again (use the same username and password as before).

2.6 Click Direct Certification on the top menu bar.

| Direct Certific   | ation Direc  | t Verificatio                               | on   |
|---|--|---|--|
| A Home Resources  | Direct Certification   | Direct Verification                         | Reports  |
|   | $\overline{}$  |   | DCDV Home  |
| Contracting Entity  |  |   |  |
|   |  |   |  |
|   |  |   |  |
|   | ومروا ليقرر والمروحا ليرم                                      |   | Message Board 🗯  |
| Welcome to the new Dire<br>Please note, you will need<br>information on the file form | t Certification/Direct Ve<br>to use the file format to<br>nat. | ification System!<br>do batch uploads in bo | with Direct Certification and Direct Verification. The match reports will also be in a different format and you will need to make sure y |
| The upload file cannot ha   | ve column headings. If y                                       | ou are getting an error                     | r 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: Thursday, Octo  | per 05, 2017 12:41:06 PM                                       |   |  |
| 1.0.0   |  |   | Texas Department of Agriculture. All rights Reserved.  |
|   |  |   | Unauthorized use is prohibited. Use may be subject to security testing and monitoring.   |

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

| Direct        | Certific        | ation Direct                 | Verificatio                                  | on                       |                     |                  |  |   |
|---------------|-----------------|------------------------------|--|--------------------------|---------------------|------------------|--|---|
| A Home        | Resources       |                              | Direct Verification                          | Reports                  |                     |                  |  |   |
|               |                 |                              |  |                          |                     |                  | Direct Ce  | ertification  |
| Contractin    | ng Entity       |                              | *  |                          |                     |                  |  |   |
|               |                 |                              |  |                          |                     |                  |  |   |
|               |                 |                              |  |                          |                     |                  |  |   |
| De Uploa      | d <b>Q</b> Sear | ch                           |  |                          |                     |                  |  |   |
| File to       | Import          | Supporte<br>Please no        | d File Types for Impose that only files with | orting<br>.xls.or.xlsx.e | tensions can be imp | ported.          |  | There are 200   |
| Browse.       |                 |                              |  |                          |                     |                  | ⊕ Upload   |   |
| Browse to     | iocal file lo   | cation to select the file to | o be uploaded.                               |                          |                     |                  |  |   |
| <u>v1.0.0</u> |                 |                              |  |                          |                     |                  | fexas Department of Agri                               | culture. All rights Reserv                            |
|               |                 |                              |  |                          | Misuse is subie     | unauthorized use | is prohibited. Use may t<br>ition. No expectation of p | e subject to security tes<br>rivacy except or otherwi |

2.8 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 file to upload or select the current file and Click Open.

| 🔾 🗢 📕 🕨 Compu        | er ► OS (C:) ► CSDI ► CLAIMS  |                   |                    | <b>-</b> ↓ | Search CLAIMS | _ |   |
|----------------------|-------------------------------|-------------------|--------------------|------------|---------------|---|---|
| Organize 🔻 🛛 New fol | ler                           |                   |                    |            | • ==          |   | ? |
| 🖈 Favorites          | Name                          | Date modified     | Туре               | Size       |               |   |   |
| 💻 Desktop            | @ DCEXPORT-12345-20171109     | 11/9/2017 3:23 PM | Microsoft Excel 97 | 621 KB     |               |   |   |
| Downloads            |                               |                   |                    |            |               |   |   |
| ownCloud             |                               |                   |                    |            |               |   |   |
| Recent Places        |                               |                   |                    |            |               |   |   |
| 👽 Dropbox            |                               |                   |                    |            |               |   |   |
| Libraries            |                               |                   |                    |            |               |   |   |
| Documents            |                               |                   |                    |            |               |   |   |
| J Music              |                               |                   |                    |            |               |   |   |
| E Pictures           |                               |                   |                    |            |               |   |   |
| Videos               |                               |                   |                    |            |               |   |   |
|                      |                               |                   |                    |            |               |   |   |
| Commission           |                               |                   |                    |            |               |   |   |
|                      |                               |                   |                    |            |               |   |   |
| S (C:)               |                               |                   |                    |            |               |   |   |
| S (C:)               |                               |                   |                    |            |               |   |   |
| S (C:)               | Iame: DCEXPORT_12345_20171100 |                   |                    | •          | Turtom Files  |   |   |

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



2.10 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-To   | <b>⊡</b> Log C |
|-----------|--|----------------|
| Direct Ce | tification 2017–2018 Sct   | nool Year      |
|           |  |                |
|           | ✓ File Successfully Uploaded   | x              |
| ① Upload  | The import is complete. The total number of records in the uploaded file is .<br>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<br>Best Practice: Use the Snipping Tool, found in Windows Accessories, to save a screenshot of the Upload results. Click on "How-<br>To" in the menu bar for a tutorial on how to use the tool and how to save screenshots. |                |

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

| Direct Certifica                | tion Direct Verification   |  |
|---------------------------------|--|--|
| A Home Resources                | Direct Certification Direct Verificatio  |  |
|                                 | Di   | rect Certification   |
| Contracting Entity              |  |  |
|                                 |  |  |
|                                 |  |  |
| Upload Q Search                 |  |  |
| File to Import                  | Supported File Types for Importing<br>Please note that only files with using or using extensions can be imported | ✓ File Successfully Uploaded   |
|                                 |  | The import is complete. The total number   |
| Browse                          | •  | Upload The number of records successfully matc                                       |
| Browse to your local file local | ion to select the file to be uploaded.   | Click on the Reports link at the top of the  |
|                                 |  | Best Practice: Use the Snipping Tool,<br>To" in the menu bar for a tutorial on how t |
|                                 |  |  |

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

| Direct Certification D   | irect Verification  |                           |
|--|---|---------------------------|
| A Home Resources Direct Certifi  | cation Direct Verification  |                           |
|  | Reports   |                           |
| Contracting Entity   |   |                           |
| the second s |   |                           |
|  |   |                           |
|  | Reports for Direct Certification Direct   | ct Verification           |
| Direct Certification Match Reports   | CE Direct Certification Matches<br>DC Records of claimed students for CE by month or year-to-date   | Run All Year - Ad hoc     |
|  | Data for Verification Report<br>Direct certification matches based on enroliment for the last operating day of October used to complete the Verification Report | Run Nov 5th - June 30th   |
|  | Data for CEP Report<br>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<br>DC Records of claimed students for CE  | Run June 5th - June 30th  |
|  |   |                           |



2.14 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.



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

| Auto   |                                  | 8 5  |                                |                                     |                           |  |                           |  |   |     |   |         |
|--|----------------------------------|--|--------------------------------|-------------------------------------|---------------------------|--|---------------------------|--|---|-----|---|---------|
| File   |                                  | Insert   | Page Layou                     | it Formulas                         | Data Review               | View ACROBAT   | Q Tell me what you want   |  |   |     |   |         |
| <b>1</b> P   | ROTECTED VI                      | EW Becar   | eful—files from                | n the Internet can co               | ontain viruses. Unless yo | u need to edit, it's safer t   | o stay in Protected View. | Enable Editing   |   |     |   | ×       |
| A1   | ¥                                | ×  | $\sqrt{-f_x}$                  | Direct Certificat                   | ion Matches for .         |  | 197 - C                   |  |   |     |   | ~       |
| 1 Di<br>2 Din<br>3   | A<br>rect Cer<br>ect Certificati | <b>tificati</b><br>on Matche   | B<br>On Matc<br>es for Nationa | C<br>hes for .<br>I School Lunch Pr | D                         | T BE AND   | F                         | G  | H |     | 1                                       |         |
|  |                                  |  |                                |                                     |                           |  |                           |  |   |     |   |         |
| 4<br>5<br>6<br>7<br>8<br>9<br>10<br>11<br>12<br>13<br>14<br>15<br>16<br>17<br>18<br>19<br>20 | TALLEY PROPERTY.                 | The second secon | August and a second            | Siletitulita.lui                    | Constanting               | Contraction of the local division of the loc |                           | lana and a state of the state o |   | l   | 100000000000000000000000000000000000000 |         |
| 2  | 3                                | neeti  |                                |                                     |                           |  |                           |  |   |     |   |         |
| Ready  |                                  |  |                                |                                     |                           |  |                           |  |   | 用回門 | -                                       | -+ 100% |

2.17 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.

| rganize 🔻 Ne  | w folde | r                                    |                    |             |            | • == | 2 |
|---------------|---------|--------------------------------------|--------------------|-------------|------------|------|---|
| 😍 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 |            |      |   |
| Documents     |         | 🌗 Apps                               | 1/31/2014 11:28 AM | File folder |            |      |   |
|               |         | CreateFTPDC                          | 8/4/2017 10:12 AM  | File folder |            |      |   |
| Pictures      |         | 📕 CSDI                               | 10/9/2017 11:30 AM | File folder |            |      |   |
| Videos        |         |                                      | 3/28/2014 4:36 PM  | File folder |            |      |   |
|               | C       | 📕 DC 🌒                               | 10/9/2017 2:15 PM  | File folder |            |      |   |
| Computer      | =       | uen den                              | 4/25/2016 8:04 AM  | File folder |            |      |   |
| 📸 US (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 \ | Vorkbook (*.xlsx)                    |                    |             |            |      |   |
| Authors:      | Alex    | Tags:                                | Add a tag          | Title: Ad   | ld a title |      |   |
|               |         |                                      |                    |             |            |      |   |

- 2.18 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.
- 2.19 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.

|   |                    | 10.         |            | - 11 |      |   |
|---|--------------------|-------------|------------|------|------|---|
| Organize 🔻 New folder   |                    |             |            |      | • == | ( |
| wnCloud * Name  | Date modified      | Туре        | Size       |      |      |   |
| Image: Second Places Image: Bin   Image: Display Second Places Image: Bin | 8/3/2016 10:24 Alv | File folder |            |      |      |   |
| Libraries   |                    |             |            |      |      |   |
| Music   |                    |             |            |      |      |   |
| Pictures  |                    |             |            |      |      |   |
| Videos  |                    |             |            |      |      |   |
| Computer  |                    |             |            |      |      |   |
| and OS (C:)   |                    |             |            |      |      |   |
| Notwork V   |                    |             |            |      |      |   |
| File name DC102017  |                    |             |            |      |      |   |
| Save ac type: CSV (Comma delimited) (*.csv                                |                    |             |            |      |      |   |
| Authors: Alex   | Tags: Add a tag    | Title: A    | dd a title |      |      |   |
|   |                    |             |            |      |      |   |

2.20 Click Save then you can close Excel (click the X on the top right). If prompted, you want to keep using the .csv format and you DO NOT HAVE TO SAVE THE FILE AGAIN.

#### 11/9/2017 3 Transferring the Direct Cert file to your Child Nutrition Server

- 3.1 If you have a FTP Direct Certification Globe icon on your desktop, **double-click** on it and proceed to 3.6.
- 3.2 Click on the Windows Start button in the lower left corner of your screen.
- 3.3 Click Programs or All Programs.
- 3.4 **Click** the **CSDI** folder.
- 3.5 Click FTP Direct Cert.
- 3.6 A window opens and the next-to-last line should specify the current file name.



- 3.7 If the filename is correct, **press** to transfer the file to the Child Nutrition server; otherwise **type**
- 3.8 The file transfer occurs and you will be informed of the result.
- 3.9 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.



3.10 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:

- 4.1 Select (L) = LUNCH APPLICATION MENU
- 4.2 **Select (D) (B)** = DIRECT CERTIFICATION MENU
- 4.3 **Select 2** = PROCESS DIRECT CERTIFICATION
- 4.4 **Specify** your printer # and **confirm** it.
- 4.5 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:



- 4.6 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:
- 4.7 **Press** [ to begin processing or **press** [ to exit.
- 4.8 **Type** (1) to build the cross-reference and continue; otherwise **type** (2) or (1) to terminate.
- 4.9 You will be prompted to enter the Certification Date. **Press** [ to use today's date.
- 4.10 You will be prompted to confirm your entry. **Type** Y to proceed; otherwise **type** to reenter the certification date or **type** C to terminate and exit.

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



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

# **5 Processing the Direct Certification Exceptions**

5.1 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.

- 5.2 **Select**  $\square \square$  = LUNCH APPLICATION MENU
- 5.3 Select 2 = STUDENT MASTERFILE MAINTENANCE
- 5.4 FUNCTION [\*]  $\square$  = CHANGE

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

| 🧬 Systems D                     | esign Documentation |                 |                                  |   |  |  |  |  |  |
|---------------------------------|---------------------|-----------------|----------------------------------|---|--|--|--|--|--|
| DEC 30, 2013                    |                     | STUDENT MASTERF | NT MASTERFILE MAINTENANCE CHANGE |   |  |  |  |  |  |
| STUDENT ID# -[                  |                     | 1               | 20=FAMILY CODE -[                | 1 |  |  |  |  |  |
|                                 |                     | STUDENT NAM     | E INQUIRY IIF                    |   |  |  |  |  |  |
|                                 |                     |                 |                                  |   |  |  |  |  |  |
|                                 | NAME=               |                 | SCHOOL=                          |   |  |  |  |  |  |
|                                 |                     |                 |                                  |   |  |  |  |  |  |
|                                 |                     |                 |                                  |   |  |  |  |  |  |
|                                 |                     |                 |                                  |   |  |  |  |  |  |
|                                 |                     |                 |                                  |   |  |  |  |  |  |
|                                 |                     |                 |                                  |   |  |  |  |  |  |
|                                 |                     |                 |                                  |   |  |  |  |  |  |
| COPYRIGHT 2013 - SYSTEMS DESIGN |                     |                 |                                  |   |  |  |  |  |  |

- 5.6 Enter the student's last name from the report.
- 5.7 Enter the student's first initial from the report.
- 5.8 Press at SCHOOL.

| 11/9/2017                                  |                  |                                  |                      |                      |                 |                |  |  |  |  |  |
|--|------------------|----------------------------------|----------------------|----------------------|-----------------|----------------|--|--|--|--|--|
| P Systems Design Documentation             |                  |                                  |                      |                      |                 | _ <b>D</b> _ X |  |  |  |  |  |
| DEC 30, 2013                               | STUDENT MASTE    | RFILE MAINTEN                    | ANCE CHANGE          | Ξ                    | SC              | CH00537 🔺      |  |  |  |  |  |
| STUDENT ID# -[                             | ]                | 20=FA1                           | MILY CODE            | -[                   | ]               | ]              |  |  |  |  |  |
| STUDENT NAME INQUIRY IIF                   |                  |                                  |                      |                      |                 |                |  |  |  |  |  |
| NAME = BROWN                               |                  | A                                | SCHOOL=              |                      |                 |                |  |  |  |  |  |
| *BROWN, ALEX<br>*BROWN, ALIX               | ANDRIA J<br>AH P | 08/28/02<br>09/01/95             | 8328<br>7571         | 0101<br>0001         | <b>05</b><br>12 |                |  |  |  |  |  |
| *BROWN, BLAK<br>BROWN, BRYA<br>BROWN, JAYO | EL<br>NL<br>IEL  | 05/22/08<br>09/23/97<br>07/21/96 | 8371<br>7187<br>2105 | 0101<br>0001<br>0001 | KG<br>09<br>12  |                |  |  |  |  |  |
| BROWN, JESU<br>BROWN, MATT                 | SA<br>HEW G      | 10/05/99<br>01/16/97             | 6827<br>3077<br>711  | 0001<br>0001         | 07<br>11<br>5   |                |  |  |  |  |  |
| BROWN, REBE<br>BROWN, THOM<br>*BRYANT, ASH | as w<br>Ley n    | 04/26/00<br>09/27/93             | 2364<br>7418         | 0001<br>0001         | E<br>08<br>12   | E              |  |  |  |  |  |
|  |                  |                                  |                      |                      |                 |                |  |  |  |  |  |
| COPYRIGHT 2012 - SYSTEMS DESIGN            |                  |                                  |                      |                      |                 |                |  |  |  |  |  |

5.9 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.

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

5.10.3 32=DC[\*] T or S or C or M as indicated on the report

5.10.4 07=CURR STATUS -[\*]

- 5.10.5 32= HS[N] ES[N] HM[N] MI[N] RU[N] FO[N] **press** [ 6 times.
- 5.10.6 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.

5.10.7 FIELD-[\*\*]

5.10.8 09=STATUS CHG DT-[\*\*\*\*\*

] Enter the date used in step 7.11.

5.10.9 FIELD-[\*\*]

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

### 11/9/2017 6 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.

- 6.1 Select (L) = LUNCH APPLICATION MENU
- 6.2 Select 98 = DIRECT CERTIFICATION MENU
- 6.3 Select (1)(4) = D/C BY ASSOCIATION MENU
- 6.4 **Select ()** = ASSOCIATION BY APPLICATIONS
- 6.5 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.
- 6.6 Once the search is complete a count of the qualified students is displayed.



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

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

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

### 11/9/2017 7 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.

- 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 2** = ASSOCIATION BY PEIMS ADDRESS
- 7.5 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.
- 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  $\mathbb{N}[\mathbb{N}]$
- 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 Y to mark the qualified students as DCE.

#### 11/9/2017 8 Household Status Discrepancy Report

- 8.1 Select APPLICATION MENU
- 8.2 **Select (D) (B)** = DIRECT CERTIFICATION MENU
- 8.3 Select (1)(4) = D/C BY ASSOCIATION MENU
- 8.4 **Select 9 3** = HOUSEHOLD STATUS DISCREPANCIES

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

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



- 8.8 To print a list of the questionable records type (Y), Specify your printer # and confirm it; otherwise type (N).
- 8.9 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.

## 9 Direct Certification List

- 9.1 Select (L)A = LUNCH APPLICATION MENU
- 9.2 Select 9 = DIRECT CERTIFICATION MENU
- 9.3 **Select** 9.4 = DIRECT CERT LIST, BY CAMPUS
- 9.4 **Specify** your printer # and **confirm** it.
- 9.5 ENTER CAMPUS TO PRINT **press** for All Campuses.
- 9.6 ENTER PRINT ORDER: [\*] 2 = ALPHA ONLY. This will reduce the number of pages printed in those months where only a few students are added to a campus.
- 9.7 ENTER DATE CERTIFIED: \*\*\*\*\* Enter the date used in step 14.10. DO NOT press [Enter--] or you will get a listing of ALL students added this year instead of those just added today.
- 9.8 SELECT GROUP: [\*] =ALL DC STUDENTS
- 9.9 ALL OK?(YNC)-[\*]
- 9.10 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)-[\*]

#### 11/9/2017 10 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.

- 10.1 **Select**  $\square$  = LUNCH APPLICATION MENU
- 10.2 **Select (D) (B)** = DIRECT CERTIFICATION MENU
- 10.3 **Select** 15 = D/C LETTERS ONE PER ADDRESS
- 10.4 **Specify** your printer # and **confirm** it.

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

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

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

#### 10.9 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.