DIRECT

CERTIFICATION

SY 2016

1. Logging-On to the DCDV Module

1.1 Getting Started with the DCDV Module

1.1.1 Equipment

In order to fully utilize the DCDV module, you will need the following:

- A computer with internet access

- Adobe PDF Reader

- Excel Viewer if you do not have MS Office

- TXUNPS User ID and Password

1.1.2 Minimum Browser Requirements

There are problems with the Print/Download screen in Firefox. We recommend that you use Internet Explorer or Chrome.

TDA supports only modern browsers which also provide improved security and performance.

TDA does support the latest version of Google Chrome (which automatically updates whenever it detects that a new version of the browser is available). TDA supports the current and previous major releases of Firefox, Internet Explorer, and Safari on a rolling basis. Each time a new version is released, TDA begins supporting that version and stops supporting the third most recent version.

1.1.3 Preferred Screen Resolution

The minimum screen resolution for desktop is 1024 x 768 px.

1.1.4 TX-UNPS User ID

TX-UNPS serves as the security gateway for DCDV. Before you can begin using TX-UNPS and the DCDV module, you must be assigned a user ID and password by the TX-UNPS Help Desk. To access and use the DCDV module, you must have the SNP CE Admin security group. Once this setup is complete, you may use the Internet and your assigned user ID and password to access and log onto the TX-UNPS web site.

You will receive an "unauthorized user" message if you have just changed your password.

Your password for TX-UNPS must be updated every 90 days. When a TX-UNPS password is changed, it must be updated in the TDA database before you can access the DCDV module. The database is refreshed about 6 PM every evening. Normally you can access the DCDV module the next day after changing your password. If you change your password late in the evening, you may have to wait two days before accessing the DCDV module.

The TDA Helpdesk can assist you with your TX-UNPS log-on. Call -1-877-TEX-MEAL (877-839-6325).

1.1.5 Accessing the TX-UNPS Web Site

You can log-on to TX-UNPS from any computer connected to the Internet by opening your Internet browser and entering the following URL in the browser's address line:

https://txunps1.texasagriculture.gov

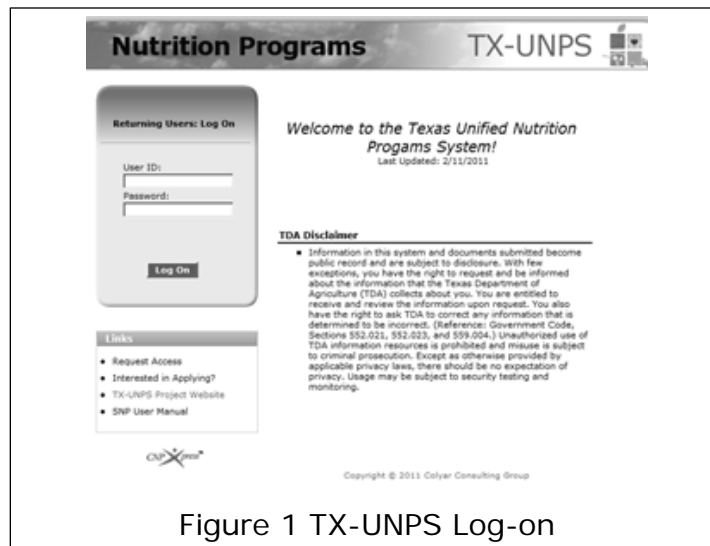The TX-UNPS log-on page will open (Figure 1).

Figure 1 TX-UNPS Log-on

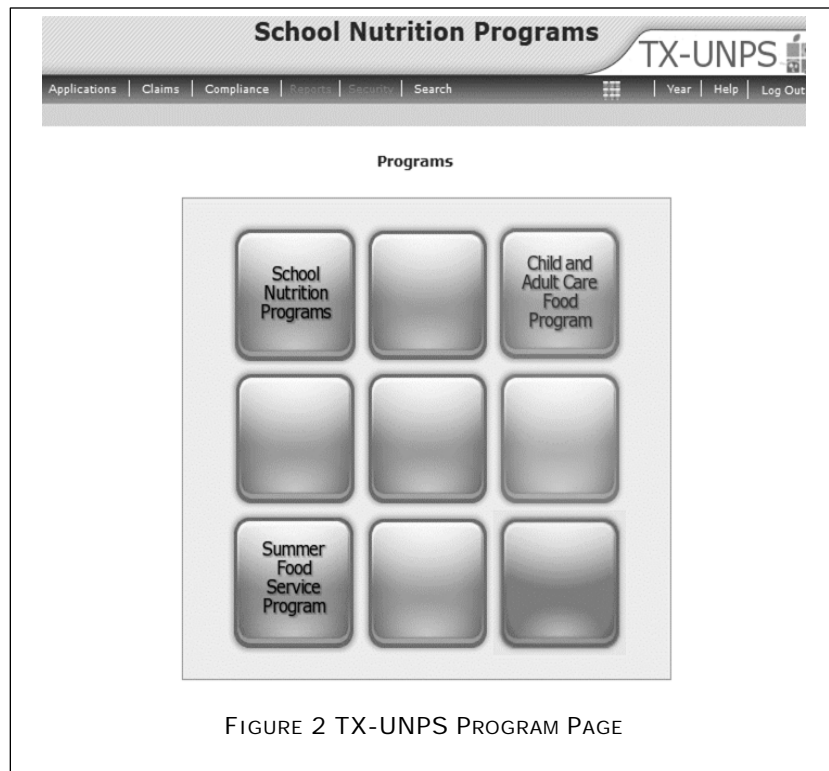## 1.2 Logging On to TX-UNPS

1.2.1 Log on:

If a user only has access to the School Nutrition Programs module, the Programs screen is not be displayed.

- Enter your TX-UNPS User

- Enter your password.

- Select Log On.

1.2.2 TX-UNPS Programs Page:

Once you successfully log on, the TX-UNPS Programs page is displayed (Figure 2).

FIGURE 2 TX-UNPS PROGRAM PAGE

1.2.3 School Nutrition Programs Home Page:

The School Nutrition Programs home page contains the message board used by state administrators to post and maintain School Nutrition Programs-related messages. Messages contain important news regarding the submission due dates, upcoming training, legislative changes, or any other SNP-specific information. Announcements regarding Direct Certification and Verification will be posted here as well.

1.2.4 Access the School Nutrition Programs Home Page:

- On the Programs screen, select *School Nutrition Programs*, the blue tile on the top-row, left-side.

- The School Nutrition Programs home page displays (Figure 3).
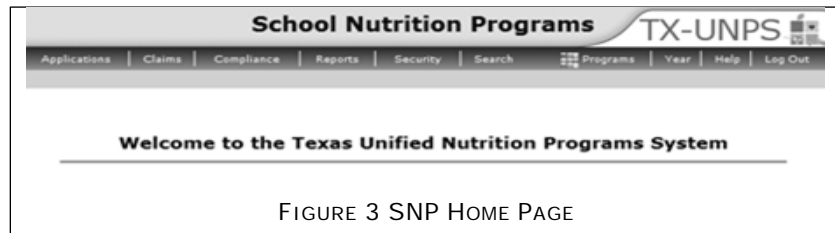

FIGURE 3 SNP HOME PAGE

1.2.5 Access the Direct Certification Module

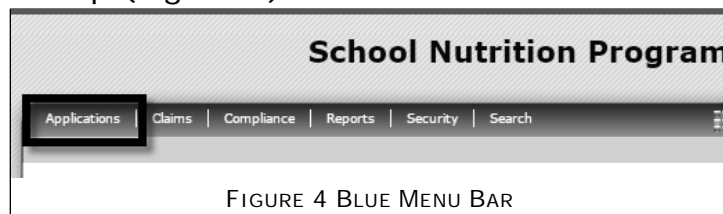- Select *Applications* from the blue menu bar at the top (Figure 4).

FIGURE 4 BLUE MENU BAR

- From the Applications list, select *Direct Certification/Direct Verification* (near bottom of list) (Figure 5)

FIGURE 5 APPLICATIONS MENU

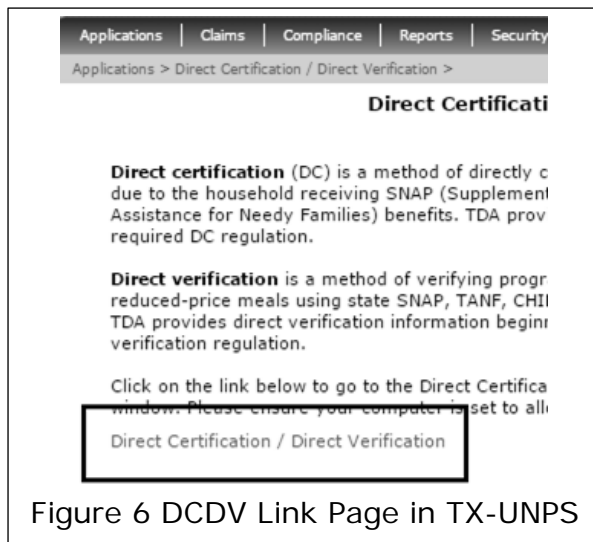- From the DCDV program page, select the Direct Certification/Direct Verification link at bottom of page (Figure 8)

Figure 6 DCDV Link Page in TX-UNPS

By selecting the Direct Certification / Direct Verification link on this screen, a new browser window will open providing access to the Direct Certification/Direct Verification module.

1.2.6 Logging Out

When you complete a DCDV Module session, please logout. Your TX-UNPS browser session will remain active until the system times out (i.e., 20 minutes). If using the Direct Certification-Direct Verification module takes longer than 20 minutes, you will need to re-login to TX-UNPS. If you must leave the computer, please logout so that another person who might use your computer cannot have access to information within DCDV.

1.2.7 Protect Your Identify

You should keep your User ID and password in a secure location and you should not share it with anyone.

The screen will not open if you have a pop-up blocker running on your system. If this occurs, hold down the CTRL key and select Direct Certification / Direct Verification again.

2. Direct Certification Matching

2.1 Access a State Match List for Direct Certification

After selecting the Direct Certification/Direct Verification link in TX-UNPS, a new browser window will open displaying the Direct Certification-Direct Verification Home Page.

Click the *Direct Certification* link in the upper left corner to go to the Direct Certification screens (Figure 7).

FIGURE 7 DCDV OPEN SCREEN
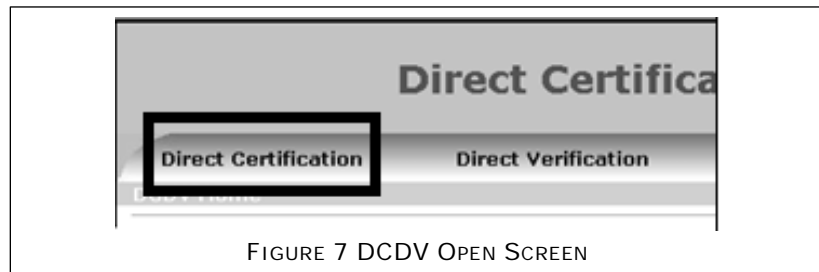
If you are a CE user only associated with one Contracting Entity, the Contracting Entity ID, Contracting Entity Name and CD Code fields will be pre-populated.

If you are a CE user with access to multiple Contracting Entities, the Contracting Entity ID field will be blank.

Contracting Entity ID: [   ] Enter the 5-digit CE ID you wish to access and click the Tab key. The Contracting Entity Name and CD Code will populate based on the entered CE ID.

If you enter a CE ID that is not associated with your user account, you will receive an error message.

The Direct Certification Home Page will open (Figure 8)

.

Direct Certification Home Page

Print/Download Direct Certification Matches

CE Import for CE Level Matches

Search Page for CE Level Matches

FIGURE 8 DC HOME PAGE MENU

2.2 Print/Download Direct Certification Matches

2.2.1 Report Type and Parameters

Select the Match List you want to access.

Report Type

◉ State Level Matches   ○ CE Level Matches

Report Parameters

☐ Year to Date List

Update Period   Select Month ▼

[View/Print]   [Download]

Figure 9 Report Type and Parameters

- Report Type
  - o State Level Matches – Matches made with SNAP/TANF data and TEA October Snapshot. New list is available each month.
  - o CE Level Matches – Matches made with SNAP/TANF data and CE enrollment data through CE Upload process. List available for each month that CE has matches.

- Report Parameter
  o Year to Date List– Comprehensive list which includes all records matched during the current school year beginning in July to current month If the CE did not have any CE Level Matches in a particular month, that month will not be on the report.
  o Select month – Select a month from the "Updated Period" drop-down list to view only records matched during a specific month. If the CE did not have any CE Level Matches in a particular month, that month will not be listed.

2.2.2 View or Print a Direct Certification List

After selecting a Report Parameter, click the View/Print button. The requested Direct Certification list will display on the screen (Figure 10).

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CE LEVEL MATCHES
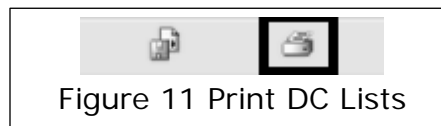
DIRECT CERTIFICATION FOR NATIONAL SCHOOL LUNCH

2015-2016

Year to Date

LAST_NAME	FIRST_NAME	MI	SSN	BIRTH_DATE	SEX	ADDRESS	CITY	STATE	ZIP	MATCH DT	EFF DT	ELIG

FIGURE 10 VIEW/PRINT LIST

Click the printer icon (under the Direct Certification link) to print the list of students (Figure 11).

Figure 11 Print DC Lists

A pop-up box appears asking for the page range. Select "All" and click "OK" (Figure 12.

FIGURE 12 PRINT OPTIONS
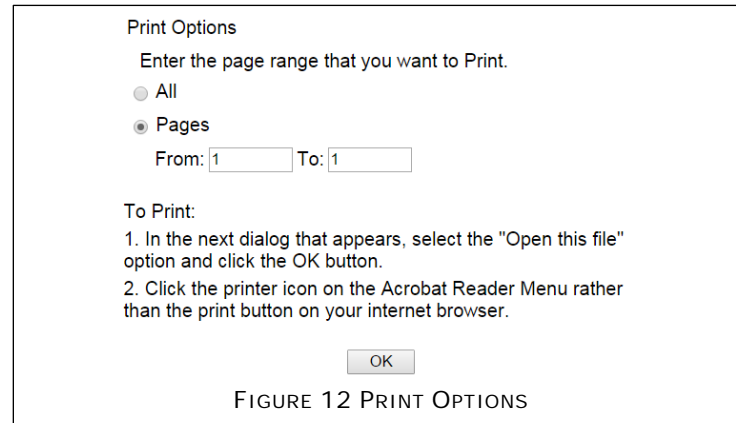
Are the columns spread very far apart?

Do the rows go up and down?

Will it print only a few pages?

See page **Error! Bookmark not defined.** in the

The list will display in PDF format. Click the printer icon on the page (Figure 13). You can see it when you move the mouse cursor near the bottom of the page.

FIGURE 13 PRINTER ICON FOR PDF IN CHROME

FIGURE 14 PRINTER ICON FOR PDF IN INTERNET EXPLORER
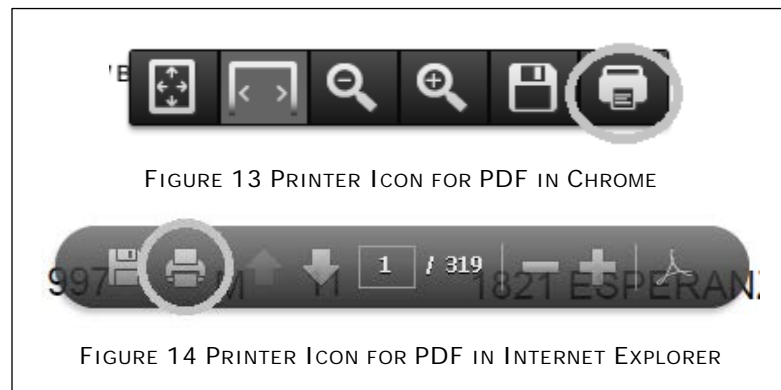
Close the PDF window.

2.3 Export List

The Print screen also gives the option to export the file to other formats. Select the Export Icon on the left to see the options. (Figure 15)

FIGURE 15 EXPORT ICON

FIGURE 16 EXPORT OPTIONS
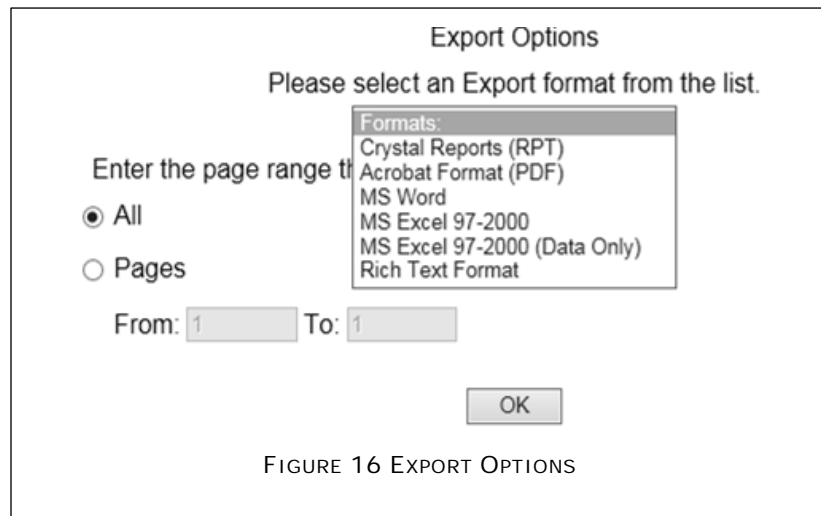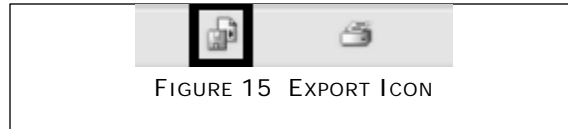
- Crystal Reports is a format similar to Adobe Format (PDF). You cannot edit Crystal Reports. You will need a Crystal Report Reader to view the report.

- Acrobat Format (PDF) is the standard that TDA uses for many forms and documents on Square Meals and in TX-UNPS Download Forms. The PDF is the format used for the printed document. You cannot edit the document unless you have Adobe Professional. You must have Adobe Reader to see the document

- MS Word is not easily editable. Each string of text is in a separate text box and the document has very minimum margins. The Rich Text Format looks

exactly the same, but will open on a computer that does not have MS Office.

FIGURE 17 MS WORD DC LIST EXPORT
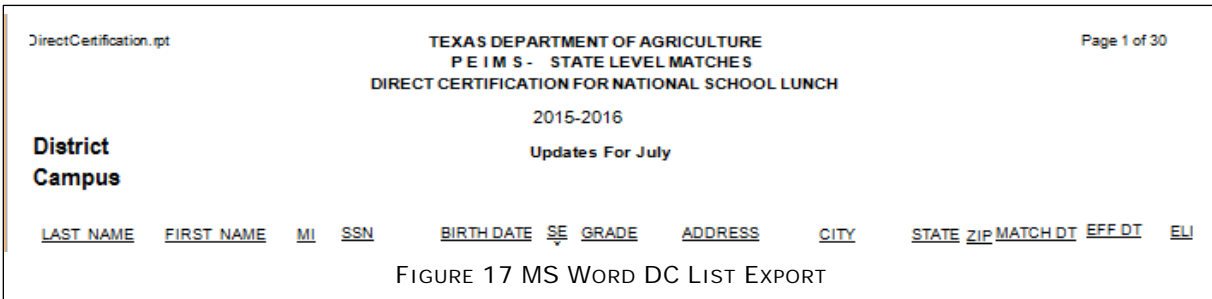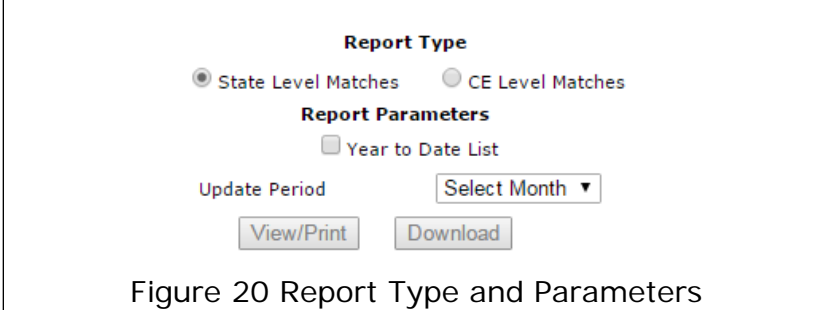
- MS Excel 97-2000 is formatted with titles (Figure 18). MS Excel 97-200 Data only is a regular spreadsheet without the formatted titles (Figure 19). This is the same format that the list will be if the *Download* option is chosen.
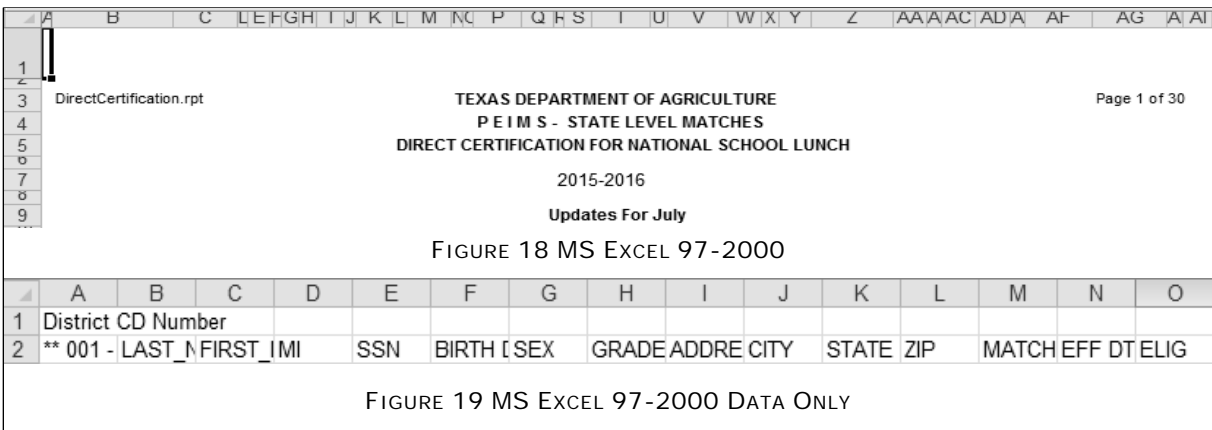
FIGURE 18 MS EXCEL 97-2000

FIGURE 19 MS EXCEL 97-2000 DATA ONLY

- Click the Direct Certification link in the upper left corner to return to the Direct Certification Main Page.

- When your direct certification activities are complete, close the Direct Certification – Direct Verification window.

2.4 Download a Direct Certification List

After selecting a report parameter, click the download button.

Figure 20 Report Type and Parameters

2.4.1 Save Messages in Different Browsers

If you are using Internet Explorer or Firefox, a pop-up box appears asking if you want to open or save the file (Figure 22).

- Click "Open".

- The requested Direct Certification list will display on the screen in Excel.

- In Chrome, the downloaded file will appear in the taskbar at the bottom of the screen.
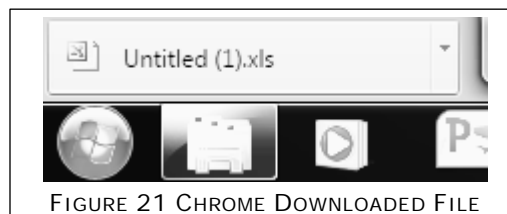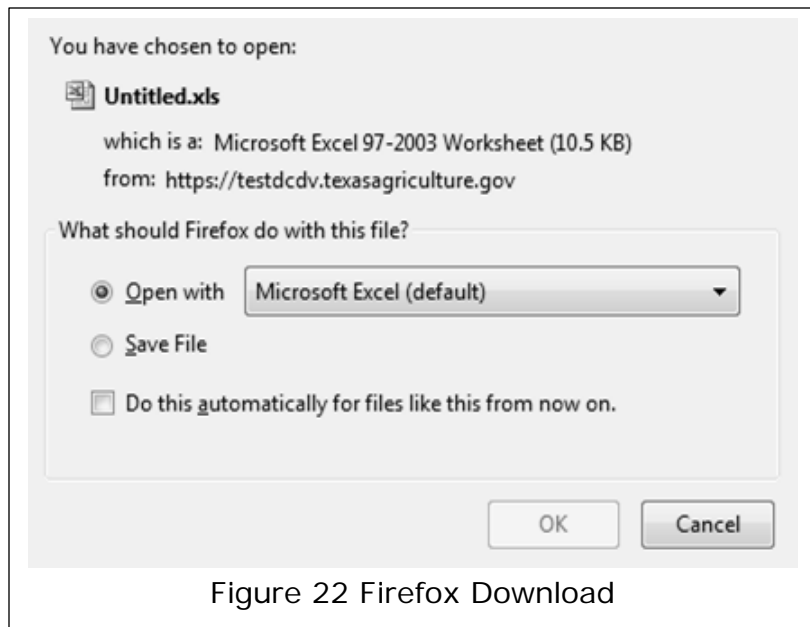

FIGURE 21 CHROME DOWNLOADED FILE
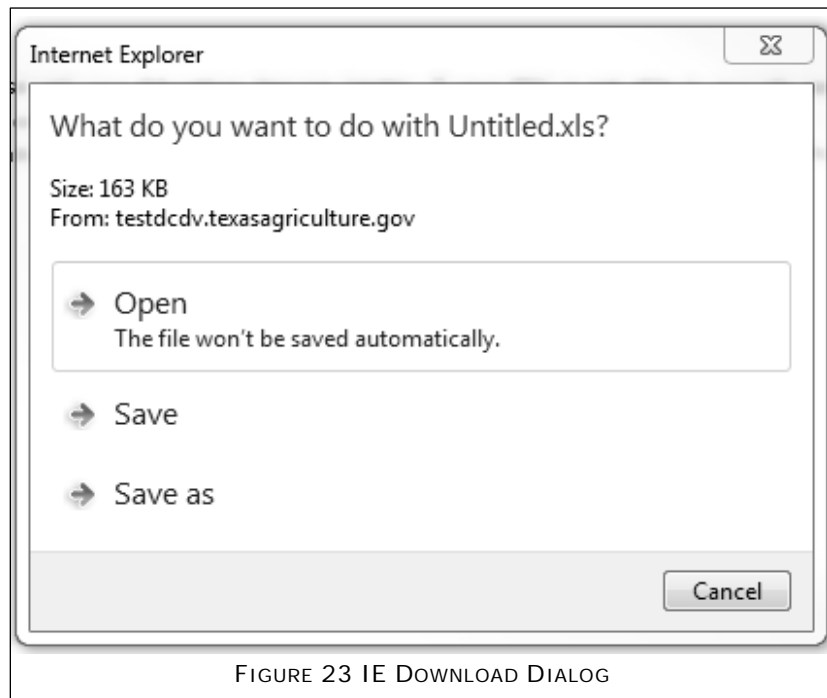
Figure 22 Firefox Download

FIGURE 23 IE DOWNLOAD DIALOG

2.4.2 Save Downloaded File

Select File > Save As to save the file. There are more detailed instructions and suggested naming convention and folder structure in the Appendix (see page **Error! Bookmark not defined.** and **Error! Bookmark not defined.**).

When saving the file, you can delete the SSN column or redact the column to have only the last four digits of the SSN. See page **Error! Bookmark not defined.** in the Appendix for instructions on redacting the SSN.

After saving the file, click the Direct Certification link in the upper left corner to return to the Direct Certification Main Page.

When your direct certification activities are complete, close the Direct Certification – Direct Verification window.

2.5 Match List Contents

Students that are listed as matched are *NEW* matches for the month. Students previously matched will not show on the subsequent lists, but their direct certification eligibility continues until June 30th (end of the school year).

The State Match List contains the names of eligible students that have been matched by TEA to your LEA based on the October Snapshot. The CE Match list contains the names of the eligible students that you have matched during the CE Upload or Individual Search processes. If you selected a month list, it contains the names of the students that were matched that month. If you selected a year-to-date list, it contains the names of all students that have been matched.

The report contains:

- Last Name
- First Name
- Middle Initial
- Birthdate

- Sex (Gender) -- M/F
- Grade
- Address (as provided to HHSC)
- City
- State
- Zip Code
- Match – Y if "yes", N if "no"
- Effective Date – this is the date that the data was loaded in the database
- Eligibility – 1 = SNAP, if there is a Y in the match column and it is empty = TANF. Sometimes TANF may be coded as 0.

The students on State Match List and CE Level Matches List are not certified until you have confirmed that a match is a student currently enrolled. The eligibility information on the student must be entered into the Point-of-Sale (POS) system, whether it is paper, stand-alone or electronic. Eligibility categories, such as SNAP, and TANF must be identified. If the household receives both, the student is direct certified as SNAP. (See Decision Paths p. **Error! Bookmark not defined.**)

2.6 CE Import for CE Level Matches

There are over 1 million children on the eligibility list from HHSC that are not matched to any LEA. To ensure that all eligible children are directly certified and receiving meal benefits as quickly as possible, all LEAs participating in NSLP/SBP in Texas are required to upload current student enrollment information <u>monthly</u> during the school year. This information is compared to HHSC SNAP/TANF data to find matches.

2.6.1 CE Import Process

Before uploading data for the Import for CE Level Matches, the data must be formatted correctly and

saved as a CSV file. (See instructions for formatting and saving the file in the Appendix – page **Error! Bookmark not defined.**)

Log onto TX-UNPS and the DCDV module. (See page 4). On the Direct Certification Home Page, select *CE Import for CE Level Matches*.

Direct Certification Home Page

Print/Download Direct Certification Matches

CE Import for CE Level Matches

Search Page for CE Level Matches

FIGURE 24 DC HOME PAGE MENU
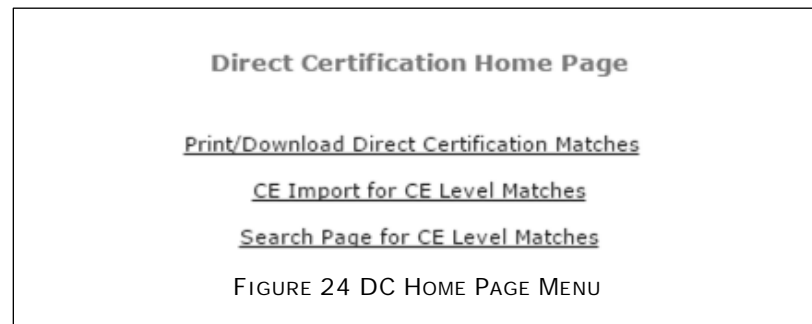
Select Browse to find the student enrollment data CSV file prepared for the upload. Select Upload File. Almost immediately, you will receive a pop-up notice of a response file. Once the file is open, select *Save as* (in Chrome and IE) and navigate to the location where the file will be saved.

If you are using **Chrome**, click on the small arrow on the right and select *Open (*Figure 25*)*.

If you are using **Internet Explorer**, select *Open (*Figure 26*)*.

If you are using **Firefox**, select *Save (*Figure 27*)*.

D--TDA-TEST-CNPIM....csv

FIGURE 25 RESPONSE FILE READY NOTICE IN CHROME

Do you want to open or save **D_TDA_TEST_CNPIMS_Import_Save_Results_apickens_7_27_2015 3_38_07 PM.csv** from **testdcdv.texasagricultu**
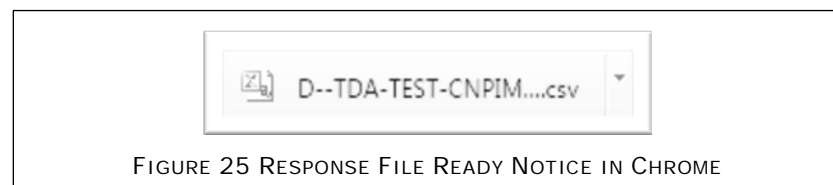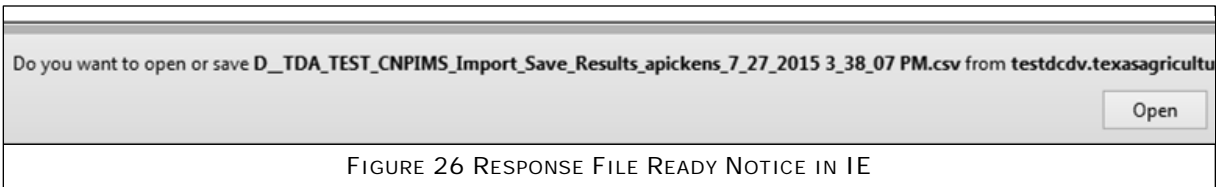
Open

FIGURE 26 RESPONSE FILE READY NOTICE IN IE
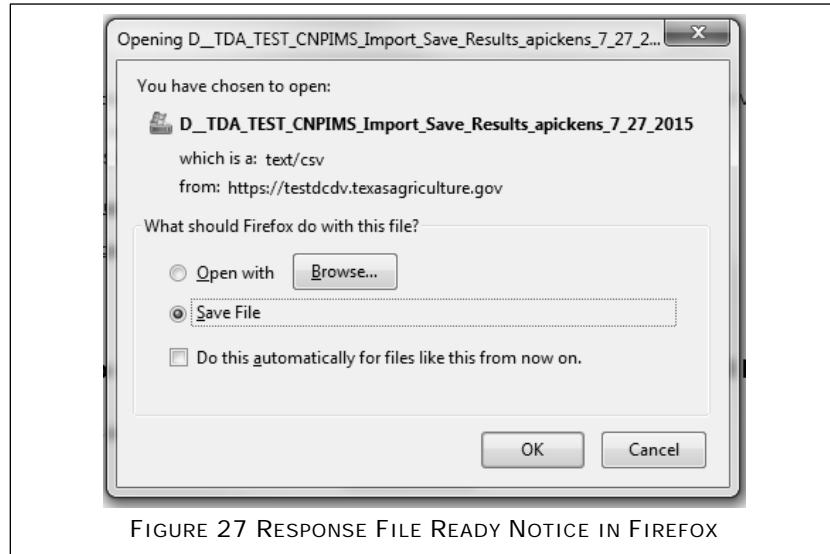
FIGURE 27 RESPONSE FILE READY NOTICE IN FIREFOX

2.6.2 CE Upload Response File

The response file is returned as a CSV file and the SSN, DOB, and CE ID will have lost the formatting that was required for the upload file. This is not a concern and did not prevent the upload file from being matched.

The response file will indicate if students are matched to children from households receiving SNAP and/or TANF benefits.

Select the *Data* tab. Select Row 1 and then select *Filter* on the *Data* ribbon (Figure 28). Select the arrow beside the word *Matched* and clear *Select All* and select *Y* and OK (Figure 29). This allows you to see the matches.

> If you have more than 50,000 matches, the first 50,000 records will be on Sheet 1. The remaining records will be on Sheet 2.

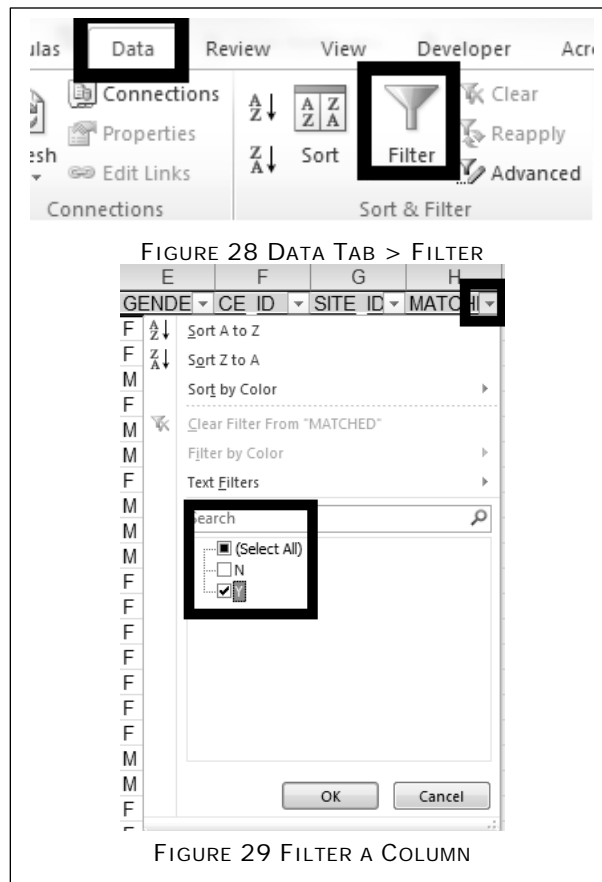FIGURE 28 DATA TAB > FILTER

FIGURE 29 FILTER A COLUMN

- Any students that are new matches for the month will have a "Y" in the *Matched* column.

- The *Eligibility* column will contain a "1" if the match is based on SNAP eligibility.

- If there is a "Y" in the Matched column and the Eligibility column contains a 0 or the cell is blank, the match is based on TANF eligibility.

	A	B	C	D	E	F	G	H	I	J
1	SSN	LAST_NAME	FIRST_NAME	BIRTH_DT	GENDER	CE_ID	SITE_ID	MATCHED	ELIGIBILITY	HasInvalidDa
86		A	A	09/ 01	F	0(1		Y	1	
172		A	A	07/ 99	M	0(1		Y	1	
174		A	D	03/ 10	M	0(1		Y	0	
257		A	F	05/ 09	F	0(1		Y	0	

FIGURE 30 RESPONSE FILE FORMAT

New matches must be confirmed for direct certification, identified in the POS system, and tagged as either SNAP or TANF. The report must be saved according to record retention guidelines. The SSN data can be redacted or deleted from the report before printing or saving.

The response file contains a column labeled *Invalid Data*. If there is an "x" in the cell for any record, then there was something wrong with one of the fields for that records and the match process was not able to work with that record. You should find the error and fix it and upload the record again (page **Error! Bookmark not defined.**). Or you can use the CE Search for Individual Matches function to confirm if there is an eligibility match for that student (page 24).

After saving the file, click the Direct Certification link in the upper left corner to return to the Direct Certification Main Page.

When your direct certification activities are complete, close the Direct Certification – Direct Verification window.

2.6.3 No Response File

If you didn't get the response file or can't find it, don't re-load the import CSV file again. The system will only match a record one time and if you upload the file again, you may open the wrong response file with no matches.

If you don't get the response file, go back to the DC Home Page and chose the Print/View Option for CE Level Matches for the current month. You will be able to download a report of matches that you just made. (See page 12)

2.7 CE Search for Individual Matches

The CE Search for Individual Match function allows you to search for individual records in the unmatched pool, as well as the all records that have been previously matched to your LEA. The advantage of the individual search is that you can search based on just SSN and DOB, or on name and DOB. There is also a "sounds" like feature for first and last names that allows for different spellings of names, such as John and Jon.

Log onto TX-UNPS and continue to the DCDV module. (See page 4). On the Direct Certification Home Page, select *CE Search for Individual Matches.*

Sounds like searches for variations in spelling.

- Select *Unmatched* if you want to search in just the records that have not been matched to any LEA.

- Select *All* if you want to search all eligible students that have been matched to your LEA.

- Enter SSN (9 digits with no dashes) and the DOB (mm/dd/yyyy)

OR

- Enter Last Name, First Name and Birth Date (mm/dd/yyyy).

- Select *Search* or Select *Sounds Like* to search for the possible match.

Search Page for CE Level Matches

[Main Menu]

○ Unmatched   ○ All

Enter SSN: [＿＿＿＿＿]

Enter Birth Date: [＿＿＿＿＿] (MM/DD/YYYY)

[Search]   [Reset]

OR

Enter Last Name: [＿＿＿＿＿＿＿＿＿]

Enter First Name: [＿＿＿＿＿＿＿＿＿]

Enter Birth Date: [＿＿＿＿＿] (MM/DD/YYYY)

○ Search   ○ Sounds Like(First Name and Last Name)

[Search]   [Reset]

FIGURE 31 CE SEARCH FOR INDIVIDUAL MATCHES

If the system finds a new match, you will see the student's name and information on the screen. Select *View* to see the details. Select *Match* to confirm that this record is a match to the student enrolled in your school. You can print or export the match. The Excel export looks like the PDF print version. It does not export as a spreadsheet in columns and rows.

	Ref. ID#	Social Security #	Student's Full Name	Birth Date	Matched
View	7882299	***-**-9253	▆▆▆▆▆▆▆▆▆▆▆	9/6/2007	
			1		

FIGURE 32 INDIVIDUAL SEARCH RESULT

Direct Certification Student Details

Student's Full Name: ▆▆▆▆▆▆▆▆▆▆▆
Social Security #: ***-**-9253
Reference ID: 7882299
Eligibility: 1

Student Details

Birth Date: 9/6/2007
Address: ▆▆▆▆▆▆▆▆▆▆▆▆▆▆▆
Matched:

Match Unmatch Print Return

FIGURE 33 MATCH SCREEN

2.8 Direct Certification Reporting

You must report the number of students enrolled on the last day of October who have been directly certified on the Verification Report in Section Three (see Verification Report in Appendix page **Error! Bookmark not defined.**).

All students certified from July 1st through end of October are counted. This includes students confirmed on the State Match lists and matched on the CE Upload Response files. Students that are certified by association are included in the count. If a student has presented an eligibility letter and you were able to certify that information either through the DC module or contact with the HHSC office, than that student is also counted.

LEAs participating in special provision programs (Provision 2 and CEP) may have alternate methods for reporting Direct Certification numbers. Please check with your ESC.

If you have questions about how to do complete the Verification Report, please contact your regional education service center (ESC).

3. Index