DIRECT CERTIFICATION/ DIRECT VERIFICATION

CE IMPORT

FOR CE LEVEL MATCHES

OVERVIEW

Direct Certification is a simplified method of determining student's eligibility for free meals through the National School Lunch and School Breakfast Programs or free milk under the Special Milk Program without completing a Household Eligibility Application. In addition, students directly certified to receive free meals or milk are not subject to verification.

BENEFITS OF THE DIRECT CERTIFICATION PROCESS:

SAVES EMPLOYEE'S TIME AND REDUCES PAPERWORK!!

Any student who has been directly certified does not have to fill out a paper application and does not have to go through the verification process

.

IDENTIFIES ELIGIBLE STUDENTS QUICKLY!

This process may identify eligible students whose household did not complete the paper application.

HHSC sends list of all children in the state ages 3 to 21 whose families are receiving benefits.

Health & Human Services Commission

TEA compares this list to enrollment data and "matches" students to the school district.
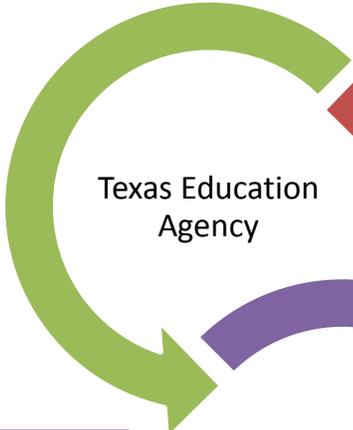
Texas Education Agency

TDA posts the updated matched and un-matched data monthly

Texas Department of Agriculture
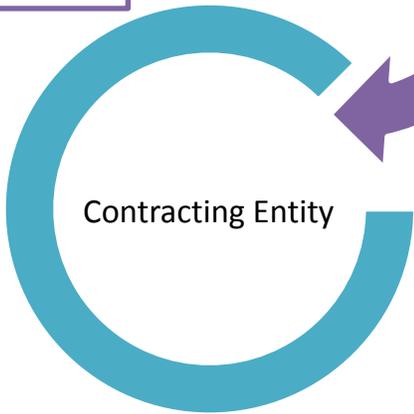
Contracting Entity

The CE monitors the State Match List and uses the CE Matching Process to determine if students are eligible for meal benefits. Any student "matched" in the system does not have to complete an application for benefits.

```
┌─────────────────────────────────────────────────────────────────┐
│           CE  prepares file with student data for upload          │
└─────────────────────────────────────────────────────────────────┘
                                 ▼
┌─────────────────────────────────────────────────────────────────┐
│  CE logs into TX-UNPS and selects Direct Certification/Direct     │
│                        Verification screen                        │
└─────────────────────────────────────────────────────────────────┘
                                 ▼
┌─────────────────────────────────────────────────────────────────┐
│                    CE selects CE Match process                    │
└─────────────────────────────────────────────────────────────────┘
                                 ▼
┌─────────────────────────────────────────────────────────────────┐
│                       CE uploads data file                        │
└─────────────────────────────────────────────────────────────────┘
                                 ▼
┌─────────────────────────────────────────────────────────────────┐
│    System returns file of eligibility records matched to CE's     │
│                            data file                              │
└─────────────────────────────────────────────────────────────────┘
                                 ▼
┌─────────────────────────────────────────────────────────────────┐
│           CE saves matched file and prints copy for records       │
└─────────────────────────────────────────────────────────────────┘
                                 ▼
┌─────────────────────────────────────────────────────────────────┐
│   CE notes in records (POS system) students  that are directly    │
│         certified for benefits -- noting category of eligibility  │
└─────────────────────────────────────────────────────────────────┘
```

Helpful Tips   IF YOU HAVE CHANGED YOUR TX-UNPS PASSWORD TODAY YOU CANNOT ACCESS THE SYSTEM UNTIL TOMORROW.

Helpful Tips   After an extended period of inactivity the system will "kick you out" and may display an unauthorized use message. If you get this message click on "EXIT" in the top right corner and log back on.

Helpful Tips   **PLEASE NOTE:** the screen shots in this guide were taken while using the Internet Explorer 9 browser. Your screens may or may not look exactly as the ones in this guide if you are using a different browser (i.e. Mozilla Foxfire, Google Chrome, Safari, etc.).

CONTENTS

It is easier if you determine where you want to store the Direct Certification files before you start the process. The most efficient method will be to create a Direct Certification folder and inside of that folder create a folder for the school year.

1. In the **MY DOCUMENTS** window, right click and choose **NEW > FOLDER**.
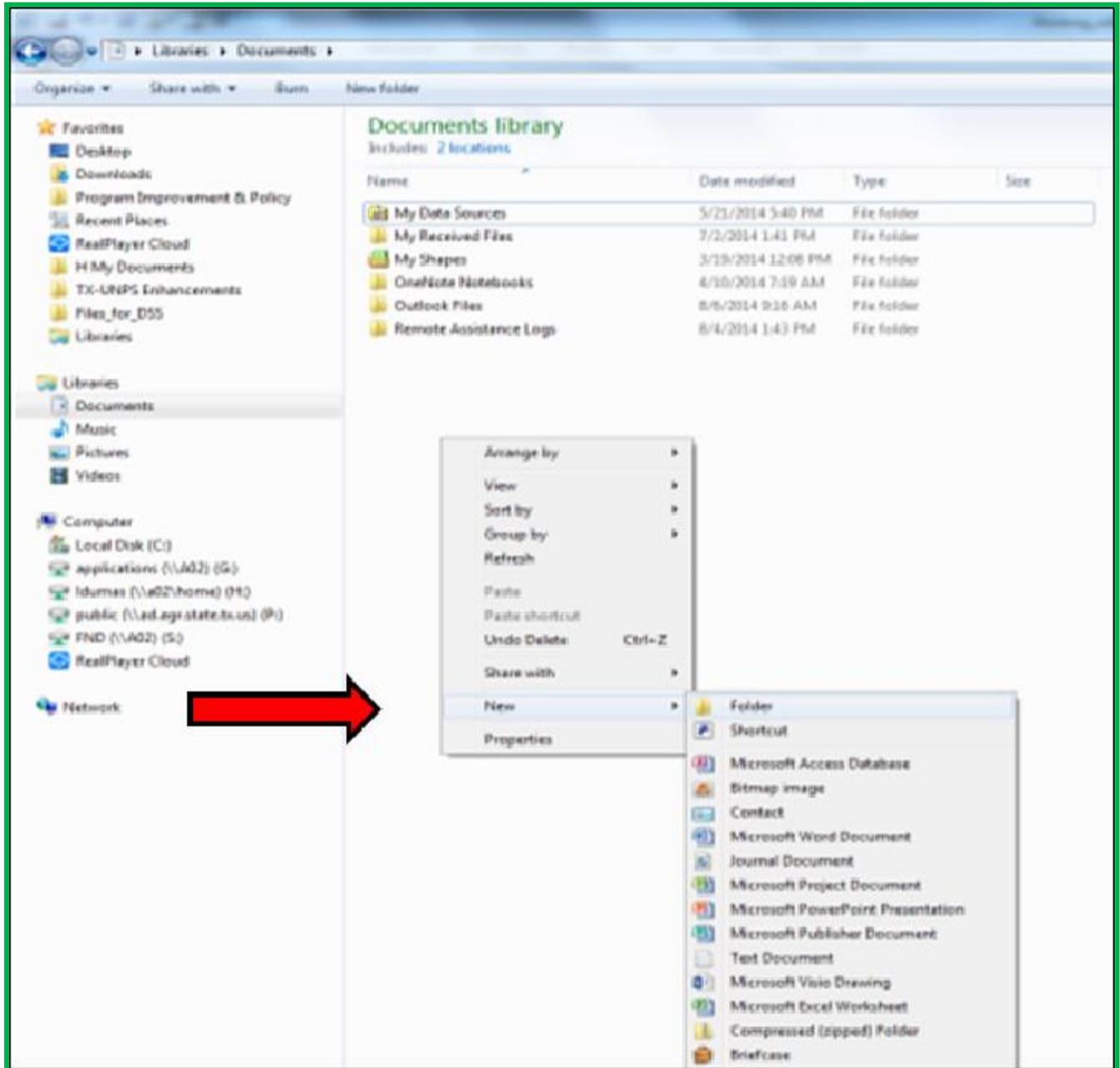
2. Name the folder **DIRECT_CERTIFICATION_DATA**.

Helpful Tips   Files are more easily corrupted if there are spaces in the file name. Use the underscore (_), hypen (-) or capital letters to take place of spaces between words.)
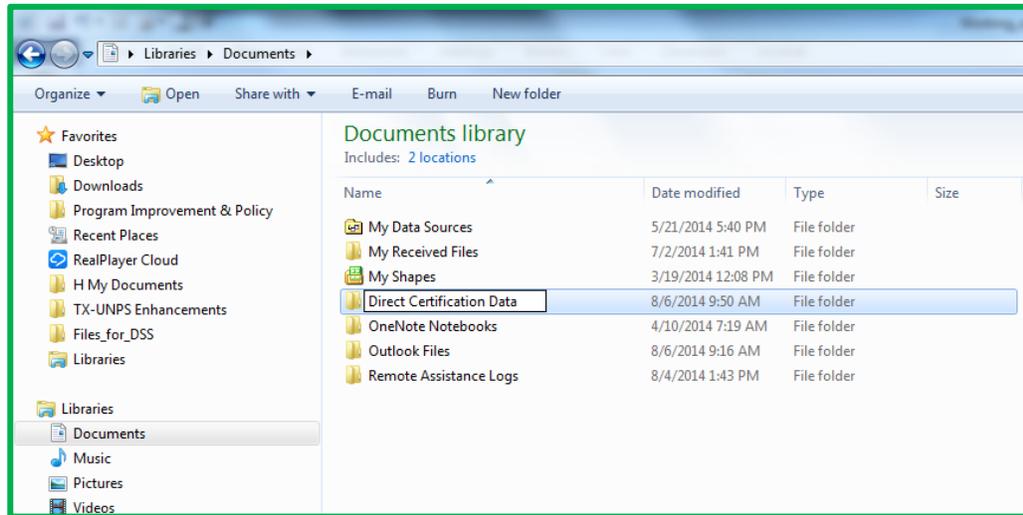
3. Inside of that folder, right click to make another New Folder. Name it **DC-** followed by the current school year.
4. Inside of this folder, make 2 more – one for DC_Lists and another for DC_Data.
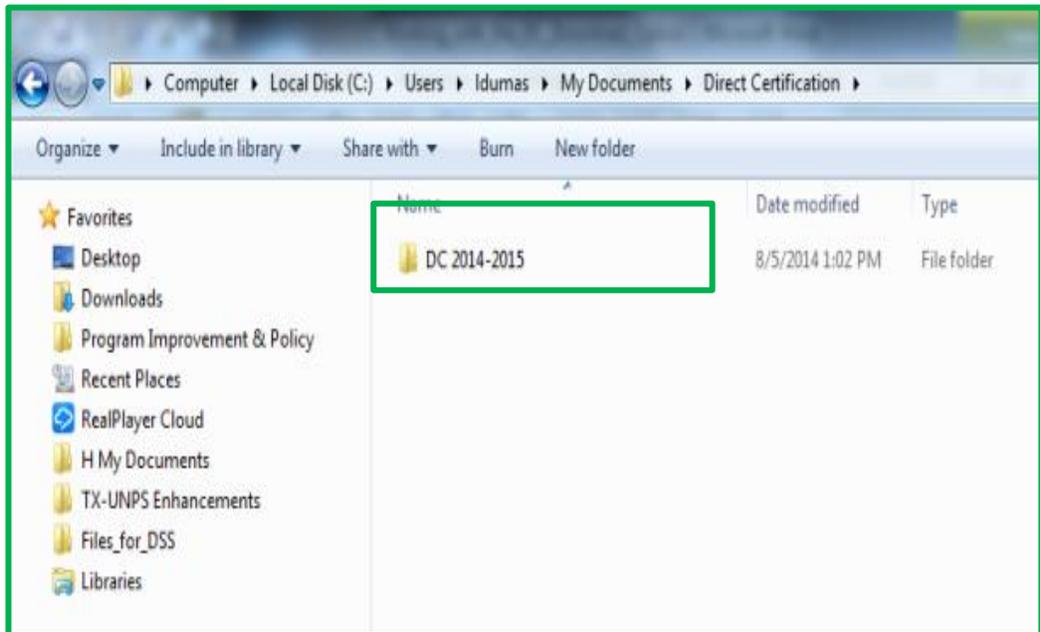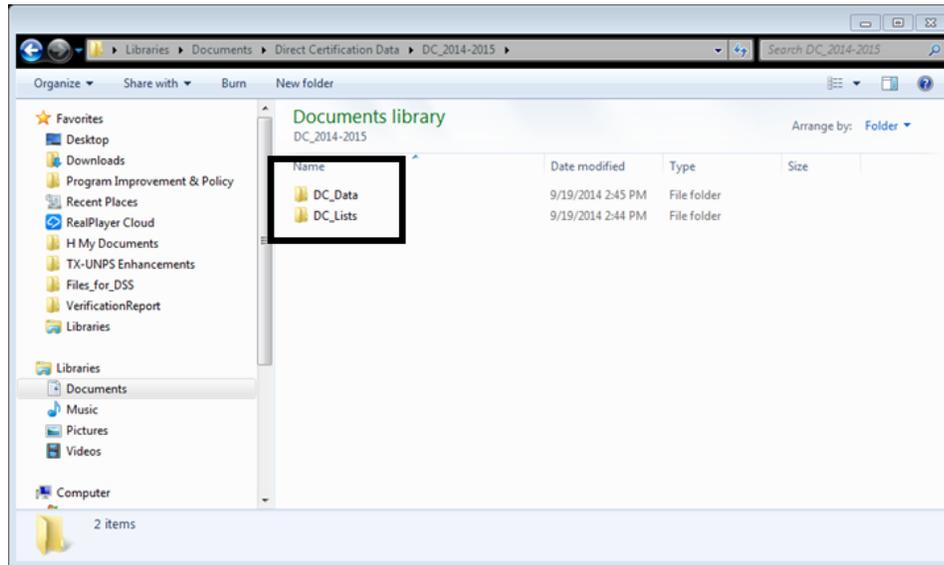
Helpful Tips **Note:** You will need to make the Direct Certification Data folder just once. Make a new DC-(school year) folder each August to start the new school year.

Helpful Tips Make a note of where on your computer you saved the folder so that it is easy to find when you need to access it later in the process.
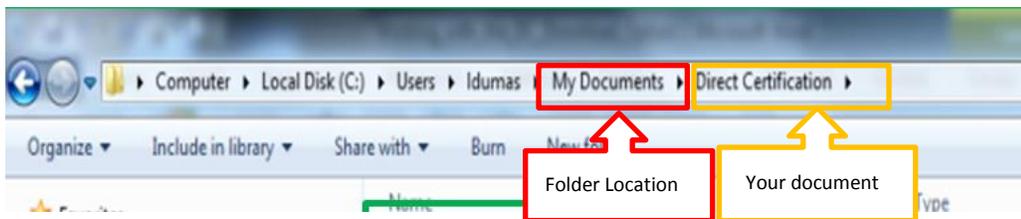
The data must be a comma delimited file (CSV). A CSV file can be made in any version of Excel.

- Your POS system may have an option for generating a file with the necessary data
- If you have access to PEIMS data (public and charter schools), contact the PEIMS clerk for your district/school and have them pull the information from PEIMS as a .csv file (or Excel file if they cannot do a .csv file type. The file must be formatted as described in Step 2.

1. Create a new file in Excel.

2. Format cells as "Text".

     Click the box in the upper left corner to select the entire worksheet.

Right -- click and select "Format Cells".
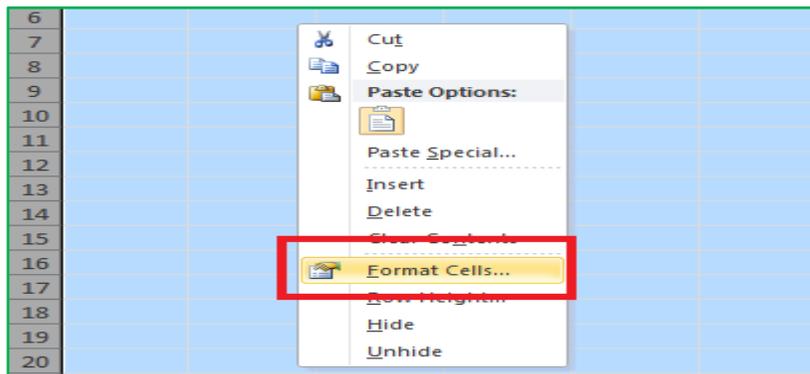
Select "Text" and
then select OK.
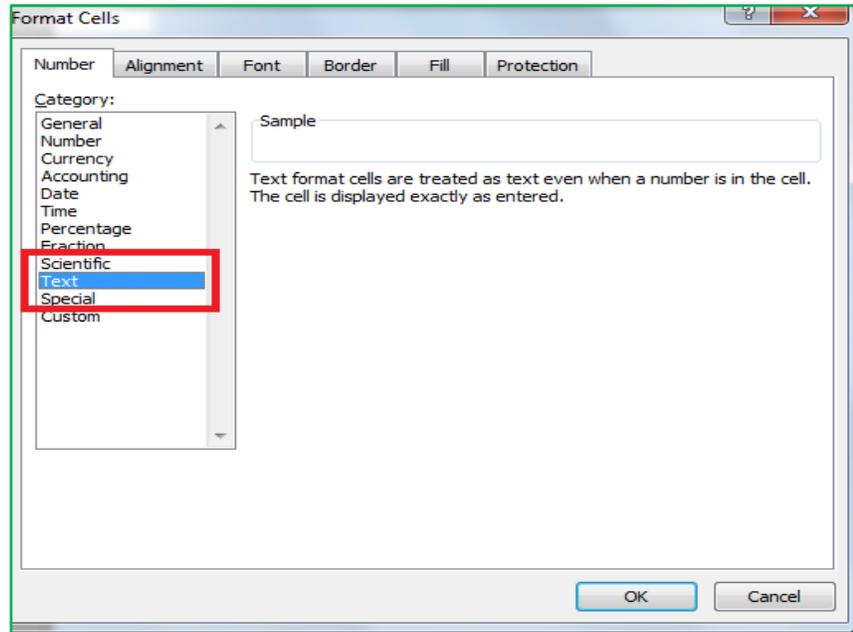
3. Set up the file with these columns in the same order and format.
   <u>Do not include header labels for the columns.</u>
   Column A: Social Security Number

   9 digits (numbers); no dashes

   Include leading zeros

   Column B: Last Name

   Column C: First Name

   Column D: Birth Date

   mm/dd/yyyy

   Must be digits(numbers) – not letters

   Must include leading zeros in month and day

   Column E: Gender (F, M)

   6th Column – *If you can pull eco eligibility information from PEIMS, it will be in this column. It will show the students that are already directly certified. Delete all previously identified students off this list before proceeding.*
   <u>If this information cannot be pulled from PEIMS, skip this column. This column will be deleted before uploading the file.</u>

   Column F: CE ID

   5 digits (numbers)

   Include leading zeros

4. When completed, save as and select "CSV (Comma delimited) (*.csv)" from the file type drop-down box.

Select File> Save as
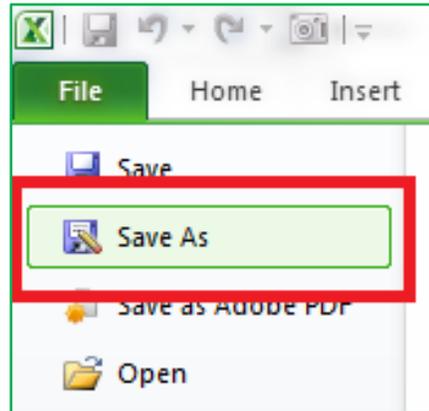
Use the drop-down for "Save as Type" and select " Comma Separated Values"
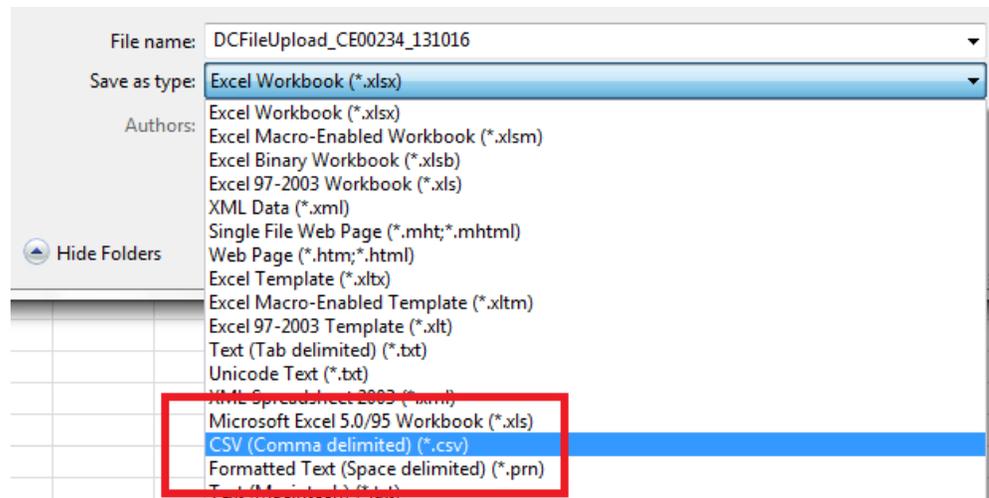
Check the CSV file in a text editor such as Notepad or WordPad instead of Excel. This will show leading zeros. Your example should look like this:
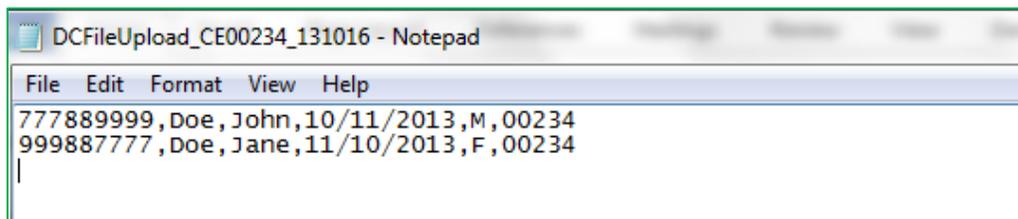
Log-in to TX-UNPS.

Go to School Nutrition Programs > Applications > Direct Certification/Direct Verification

Click on Direct Certification/Direct Verification (again)

 You will get this message if you have changed your password today or have timed out (been inactive for a period of time). If you have not changed your password, log-out and log back in and go immediately to Direct Certification/Direct Verification.

> "**Unauthorized misuse of TDA information resources is prohibited and misuse is subject to criminal prosecution. Except as otherwise provided by applicable privacy laws, there should be no expectation of privacy. Usage may be subject to security testing and monitoring.**"

Click on the "Direct Certification" link (left of screen on blue bar).
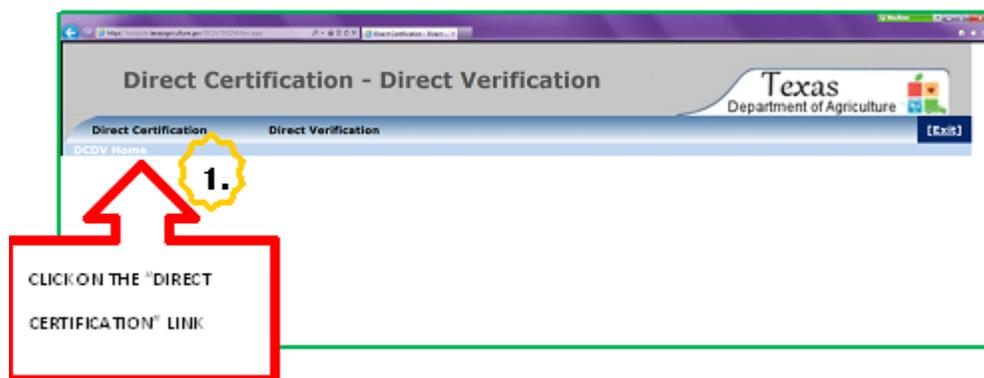
 Some users will have to enter a CE ID if they are associated with more than one district.

Select "CE Import for CE Level Matches"

The Direct Certification CE Import for CE Level Matches Upload File must be a **Comma Separated Value (CSV) file**.
Please review the web pages below for further instructions, including a quick guide,
on how to create the CSV file in the correct format needed to do an upload for CE Level Matches.
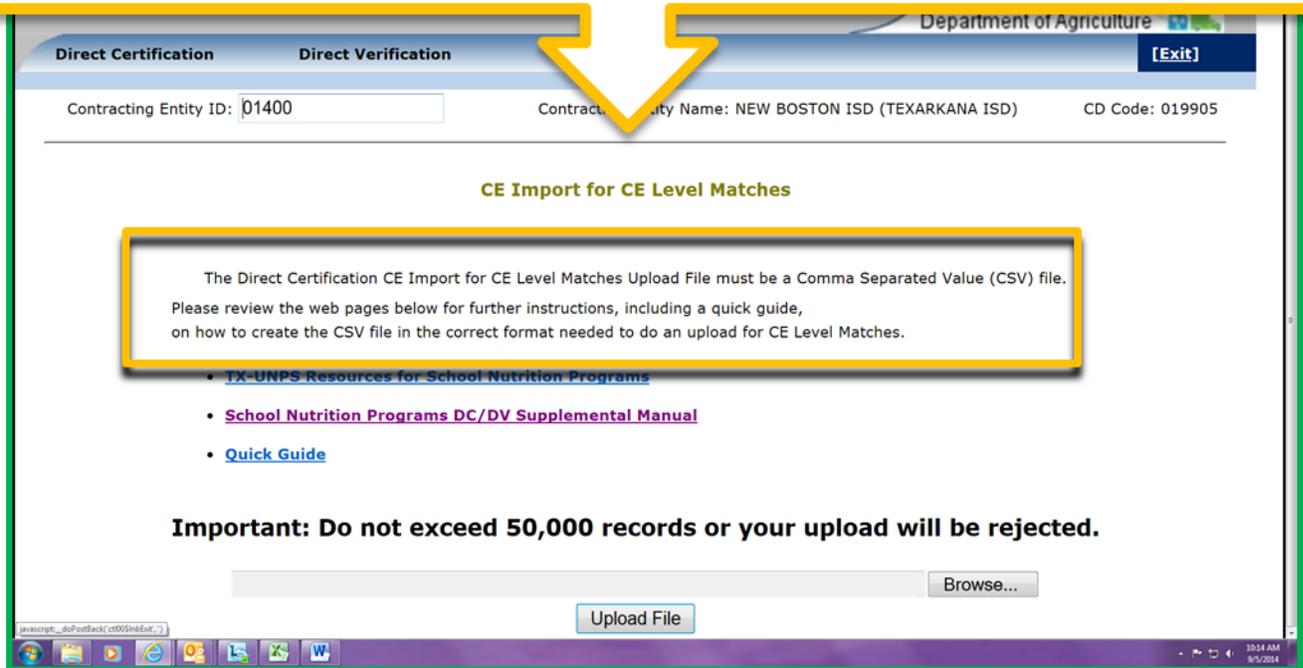
TX-UNPS RESOURCES FOR SCHOOL NUTRITION PROGRAMS

Helpful Tips

If pop-up window does not open it means you have the pop-up blocker tool on. Quick fix: Hold down your control key (Ctrl) and click on link again.

Here you will find links to multiple resources for School Nutrition Program.
This will open up in another screen. See the next picture.

This will be a separate window/screen that will open up with your main screen. You can make it bigger by click on

This is a complete user manual for the DC/DV process in TX-UNPS.

This will open up in another screen. See the next picture.

The Direct Certification ... Matches Upload File must be a Comma Separated Value (CSV) file.

Please review the web pages ... instructions, including a quick guide,
on how to create the CSV file in ... format needed to do an upload for CE Level Matches.

- School Nutrition Programs DC/DV Supplemental Manual
- Quick Guide

Important: Do not exceed 50,000 records or your upload will be rejected.

Browse...

Upload File

Direct Certification - Direct Verification

Contracting Entity Name: NEW BOSTON ISD (TEXARKANA ISD)   CD Code: 019905

TEXAS DEPARTMENT OF AGRICULTURE
Texas Unified Nutrition Programs System (TX-UNPS)

School Nutrition Programs
Direct Certification and Direct Verification (DCDV) Supplemental Manual

This is a Quick Guide-How to make a CSV File

This will open up in another screen. See the next picture.

Important: Do not exceed 50,000 records or your upload will be rejected.

Quick Guide – How to Make a CSV File for DC/DV Upload

The data must be a comma delimited file (CSV). A CSV file can be made in any version of Excel.

1. Create a new file in Excel.

2. Format cells as "Text".

   Click the box in the upper left corner to select the entire worksheet.

   Right click and select "Format Cells".

   Select "Text" and then select OK.
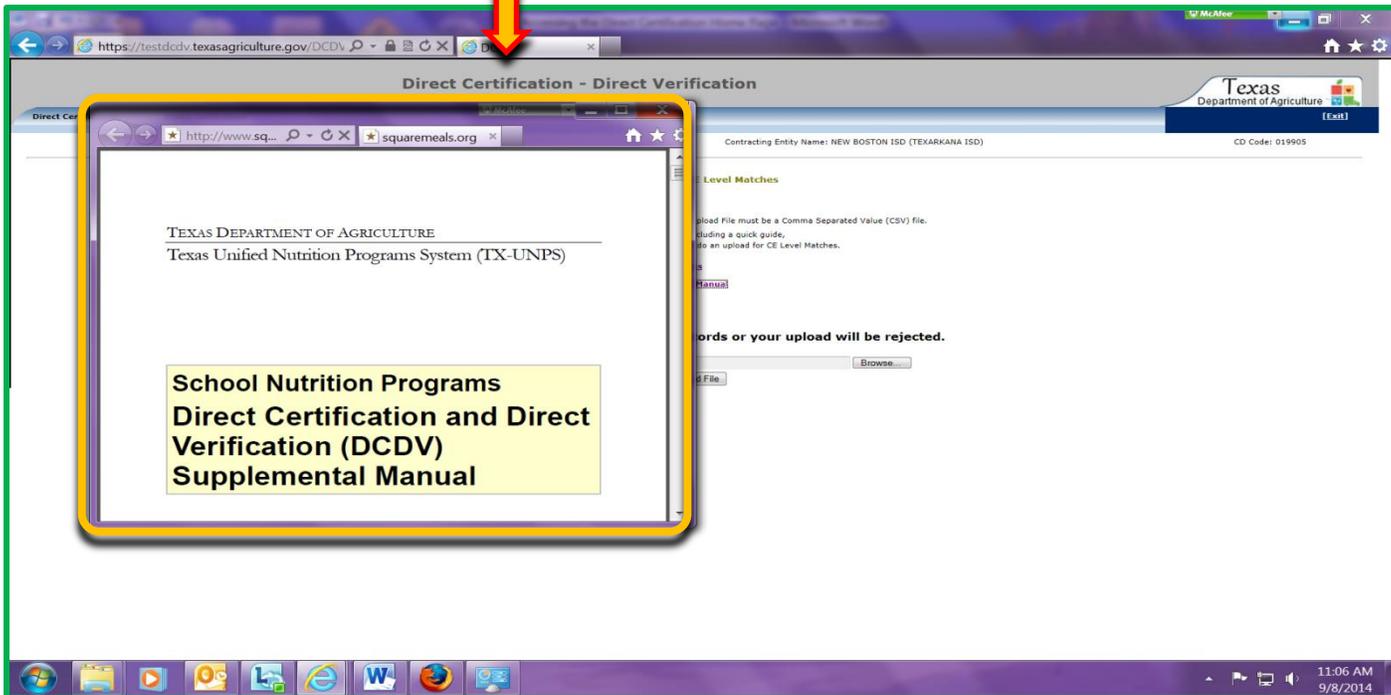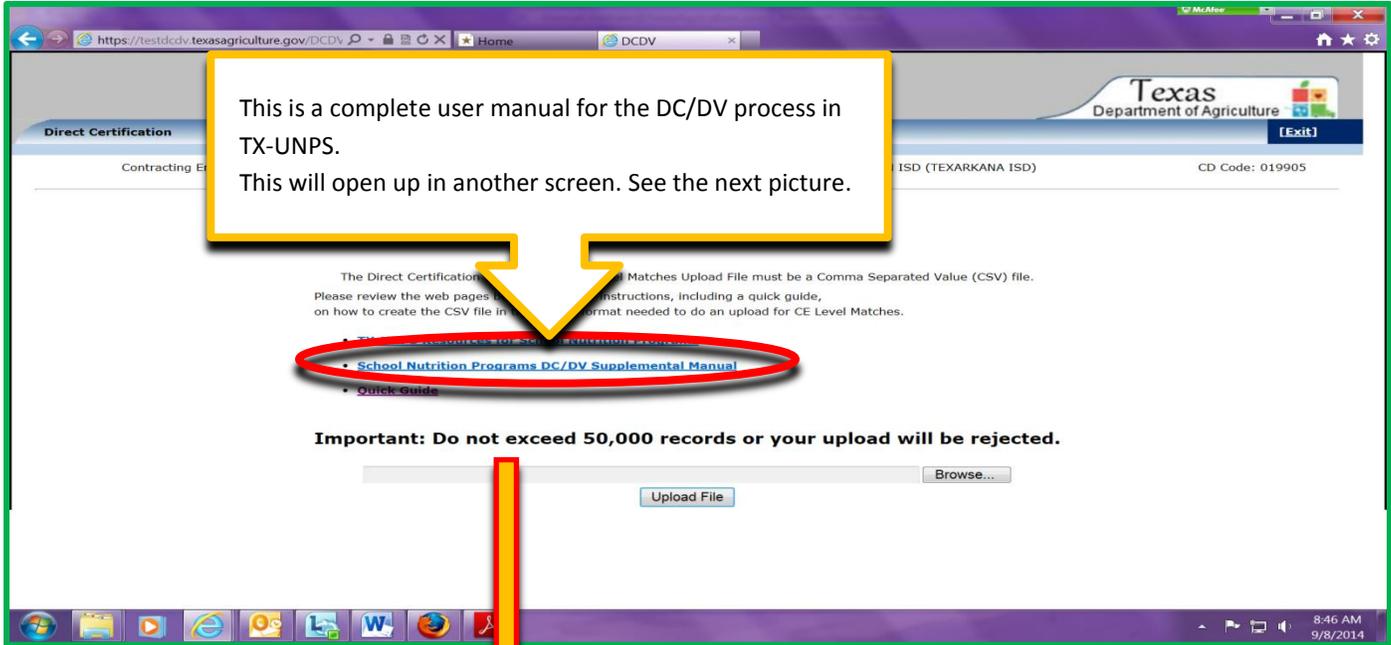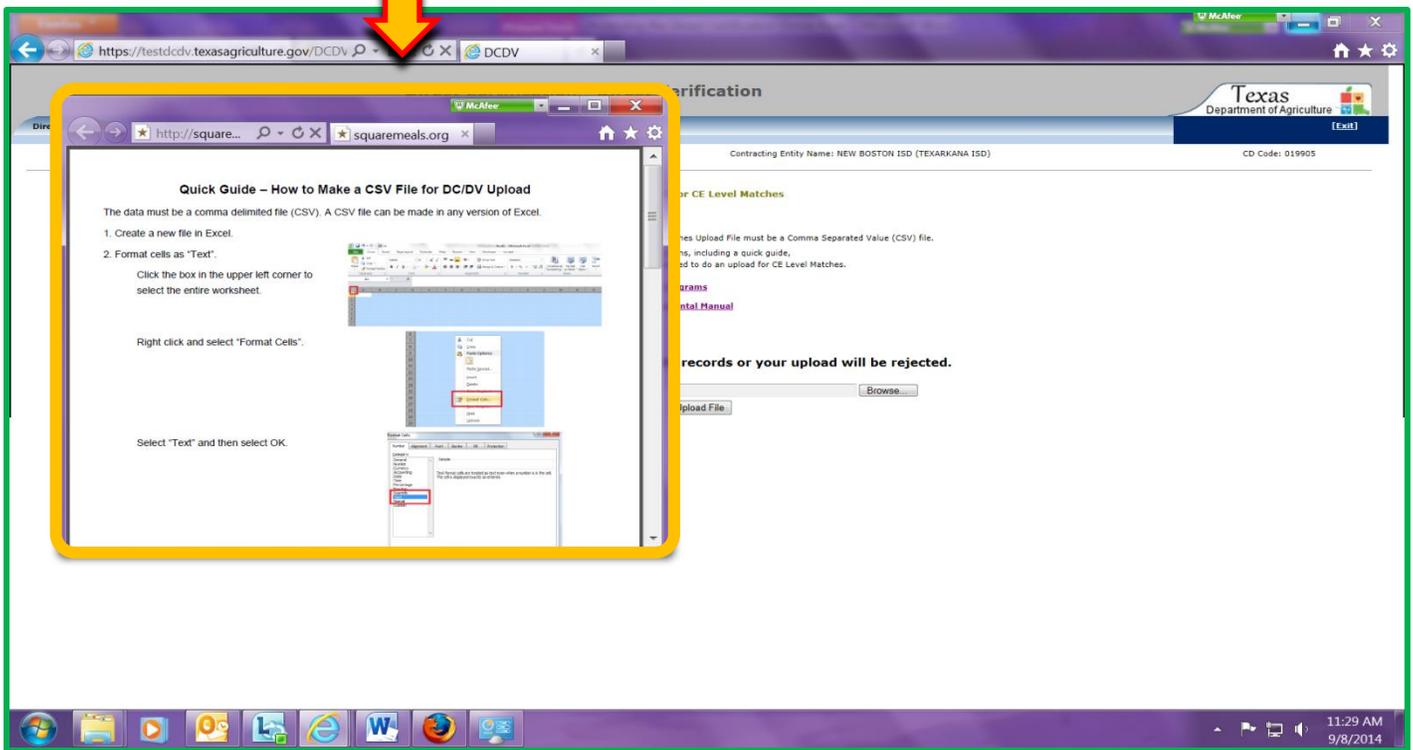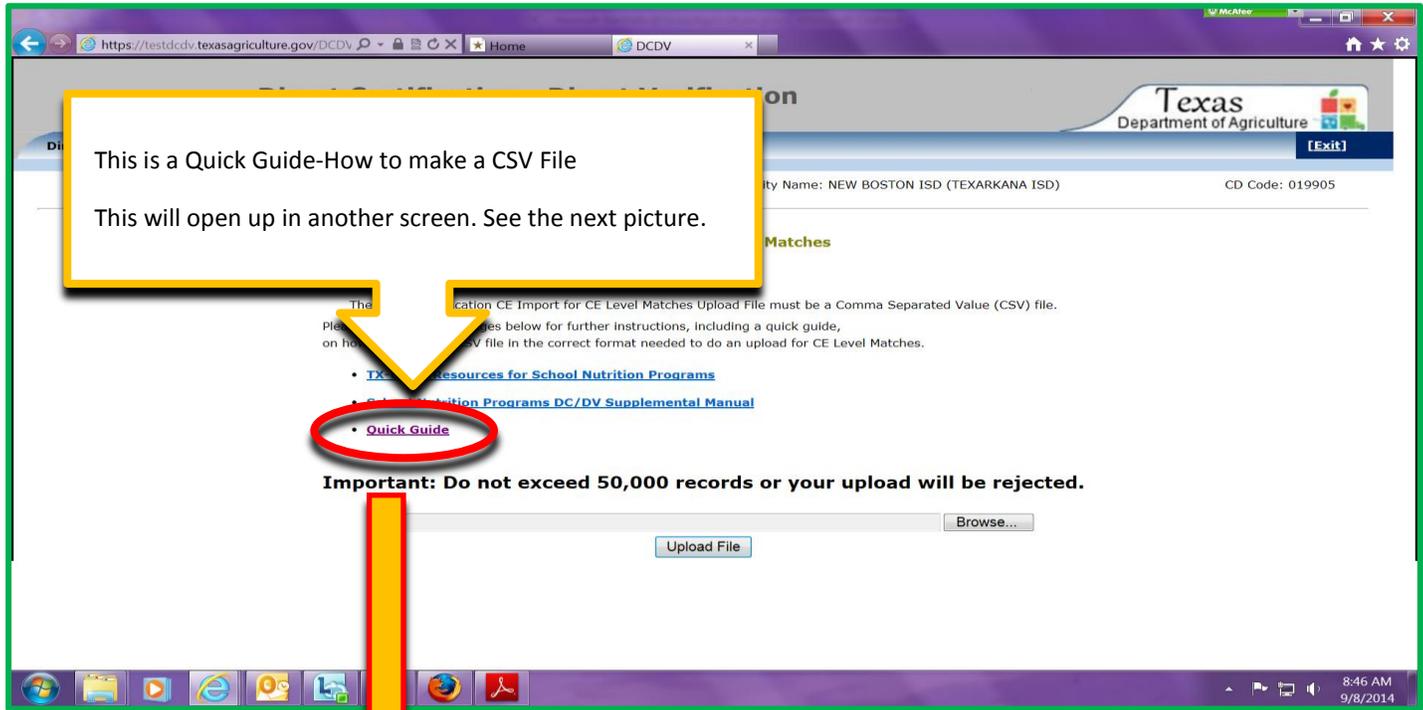
Helpful Tips If your file contains more than 50,000 records, you will need to break it up into smaller files that have less than 50,000 records. Records of 20,000 have been successfully run in a short period of time.

When you click on the Browse button you will see this box pop up. Look for your file here.

4.

Click on the file you want to upload. Next click on Open

Important: Do not exceed 50,000 records or your upload will be rejected.

Helpful Tips

If you don't see your file (Folder) make sure you are in the right location, as we covered earlier in this manual.

Direct Certification - Direct Verification

Texas
Department of Agriculture

Direct Certification   Direct Verification   [Exit]

Contracting Entity ID: 01400   Contracting Entity Name: NEW BOSTON ISD (TEXARKANA ISD)   CD Code: 019905

CE Import for CE Level Matches

5.

The Direct Certification CE Import for CE Level Matches Upload File must be a Comma Separated Value (CSV) file.
Please review the web pages below for information on how to create the CSV file in the correct format for CE Level Matches.

YOUR FILE WILL NOW BE SHOWN HERE. NEXT, SELECT "UPLOAD FILE"

- **TX-UNPS Resources for School Nutrition Programs**
- **School Nutrition Programs**
- **Quick Guide**

Important: Do not exceed 50,000 records or your upload will be rejected.

C:\Users\hvalin\Desktop\DIRECT CERT 2014\dc testing.csv   Browse...

Upload File

Direct Certification - Direct Verification

Texas
Department of Agriculture

Direct Certification   Direct Verification   [Exit]

Contracting Entity ID: 01400   Contracting Entity Name: NEW BOSTON ISD (TEXARKANA ISD)   CD Code: 019905

CE Import for CE Level Matches

The Direct Certification CE Import for CE Level Matches Upload File must be a Comma Separated Value (CSV) file.

Please review the web pages below for further instructions, including a quick guide,
on how to create the CSV file in the correct format needed to do an upload for CE Level Matches.

- **TX-UNPS Resources**
- **School Nutrition Pr...**
- **Quick Guide**

After a successful upload, you will receive this message at the bottom of the page.

Important: Do not exceed 50,000 ...s or your upload will be rejected.

Do you want to open or save D__TDA_TEST_CNPIMS_Import_Save_Results_ARUSSELL_9_5_2014 4_16_36 PM.csv from testdcdv.texasagriculture.gov?   Open   Save ▼   Cancel

When this message appears, it is a good habit to save the file first then open it. That way you will not forget to save it. Remember to save this document to your DC folder.

When saving the file it is a good idea to use the date in the name of the file so it will be easy to find on the future. EX: DC_Upload_Match_140715 (for:July, 15, 2014)

This will open up a "Save As" task box. Next, type your file name in the **File Name box**. Next, select "Save"

File name: DC_Upload_Match_140715

Direct Certification - Direct Verification

Direct Certification   Direct Verification   [Exit]

Contracting Entity ID: 01400   Contracting Entity Name: NEW BOSTON ISD (TEXARKANA ISD)   CD Code: 019905

CE Import for CE Level Matches

The Direct Certification CE Import for CE Level Matches Upload File must be a Comma Separated Value (CSV) file.
Please review the web pages below for further instructions, including a quick guide,
on how to create the CSV file in the correct format needed to do an upload for CE Level Matches.

- **TX-UNPS Resources for School Nutrition Programs**
- **School Nutrition Programs DC/DV Supplemental Manual**
- **Quick Guide**

Select "**Save As**"

Important: Do not exceed 50,000 recor

C:\Users\hvalin\Desktop\DIRECT CERT 2014\dc testi

Upload File

Do you want to open or save **D_TDA_TEST_CNPIMS_Import_Sav**...csv from **testdcdv.texasagricu**

Open   Save   Save / Save as / Save and open

PASSWORD PROTECTING FILES

Helpful
Tips   Since these files will have sensitive information (SSN, D.O.B, etc.) you need to password protect your files.

IDENTIFY EXCEL VERSION

The instructions for working with Excel differ based on the version of Microsoft Office that you have. You may be able to determine what version of Microsoft Office you have by looking at the Start Menu. If not, the following information may help you determine wich set of instructions to use. Please note: The pictures are from Word, but the same steps apply to Excel.

Click on the Microsoft Gem [icon] or [icon] on the bottom left to open the Start Menu.

- Adobe Acrobat Distiller XI
- Adobe Acrobat XI Pro
- Adobe FormsCentral
- Adobe Reader XI
- Apple Software Update
- Default Programs
- Desktop Gadget Gallery
- Internet Explorer (64-bit)
- Internet Explorer
- Windows DVD Maker
- Windows Fax and Scan
- Windows Media Center
- Windows Media Player
- Windows Update
- XPS Viewer
- 7-Zip
- Accessories
- CnpXpress
- CutePDF
- Google Chrome
- Java
- Maintenance
- McAfee
- Microsoft Lync
- Microsoft Mouse and Keyboard Center
- Microsoft Office
- Microsoft Office 2013
- Microsoft Silverlight
- Mozilla Firefox
- QuickTime

◀   Back

Double click the Microsoft Office folder. The programs listed inside of the folder will have the year of release as part of the program name. Example: Microsoft Excel 2010 is the 2010 edition.

If the year is not listed as part of the program name, use the following steps.
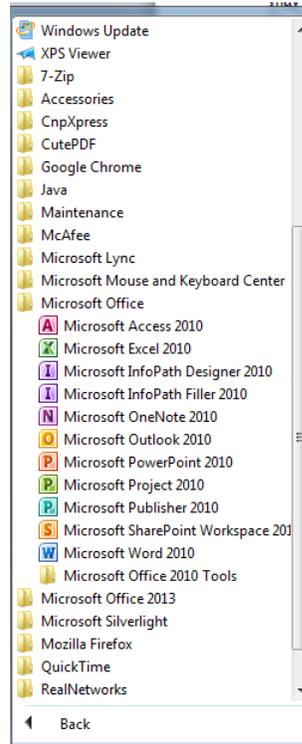
IDENTIFY EXCEL 2003 AND PASSWORD-PROTECT

Office 2003 has text-based menus on the gray bar: File, Edit, View, Insert, Format, Tools, Table, Window, and Help. (The screen shots are based on Word, but it works the same in Excel.)

- Click **HELP** > **ABOUT**
- In the **ABOUT** Dialog box, find the version on the top line.
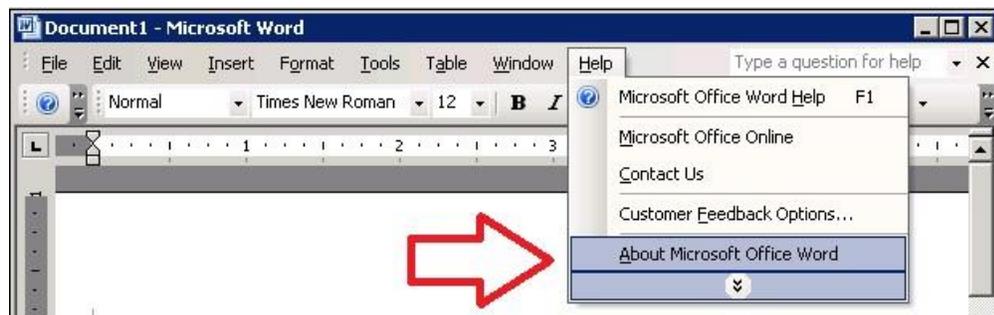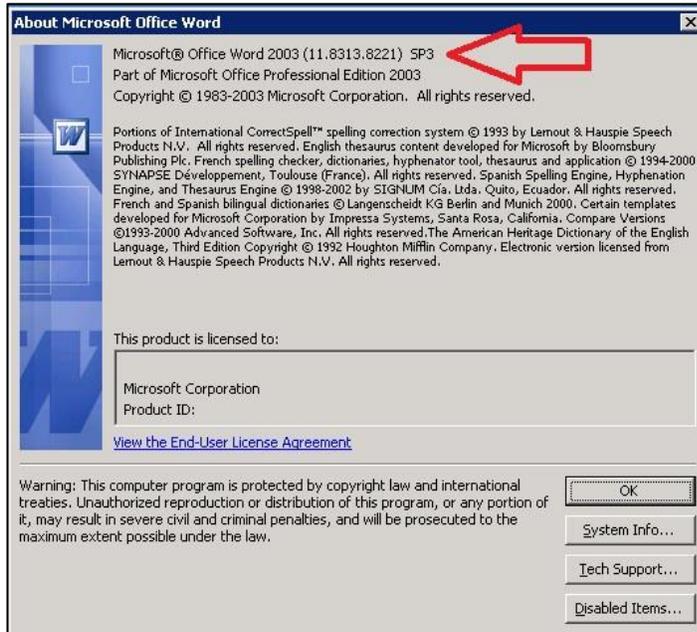
PASSWORD PROTECT IN EXCEL 2003

Go to the **FILE** menu and click **SAVE A**
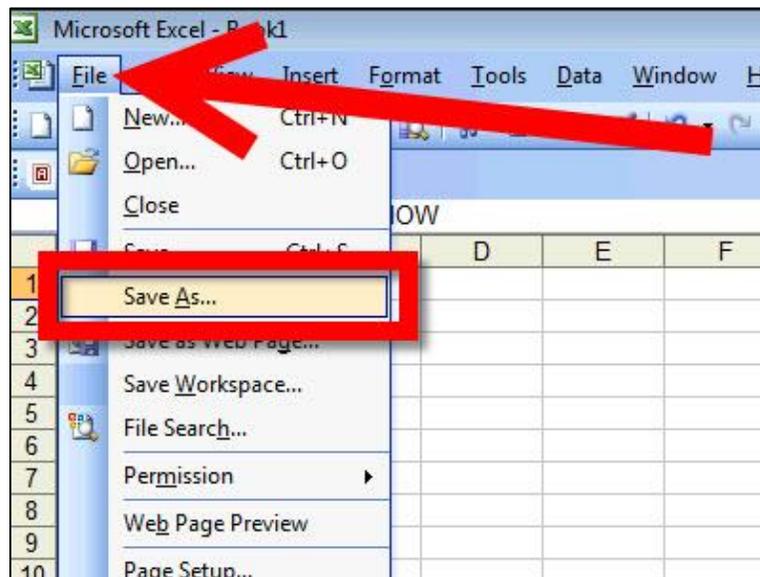
Navigate to drive and/ or folder where you plan to save the document in the **SAVE IN** box at the top. Enter the document name and click OK.
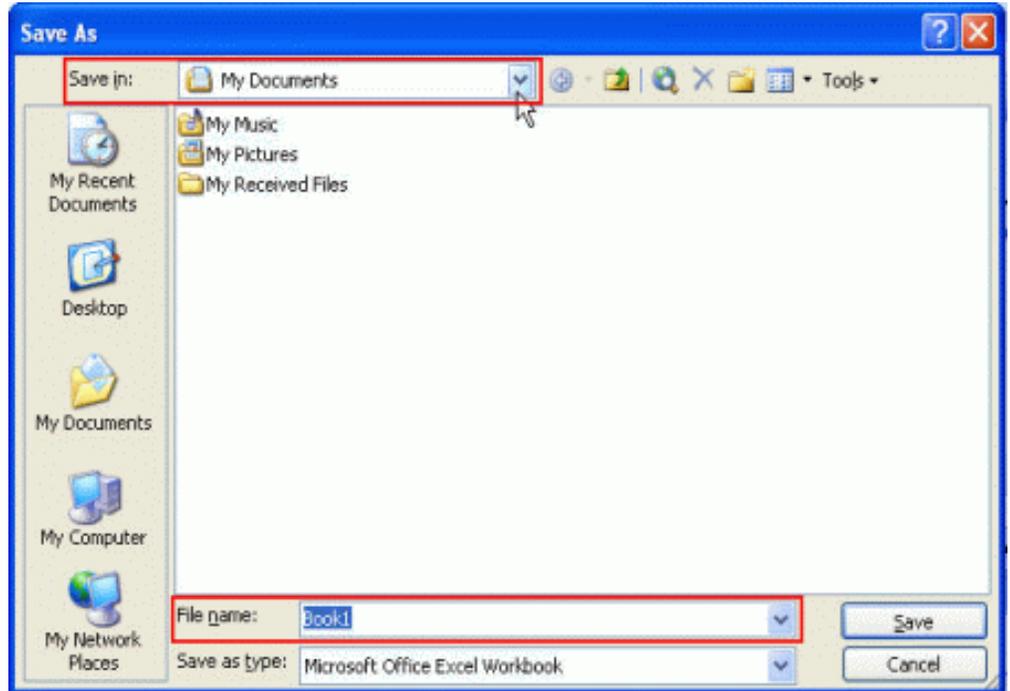
From the **TOOLS** menu, click **OPTIONS**.
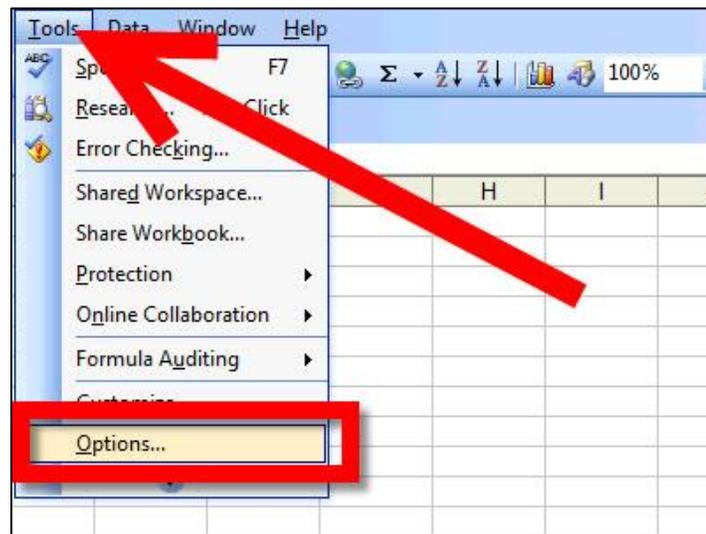
On the **SECURITY** tab, type a password in the field for **PASSWORD TO OPEN**
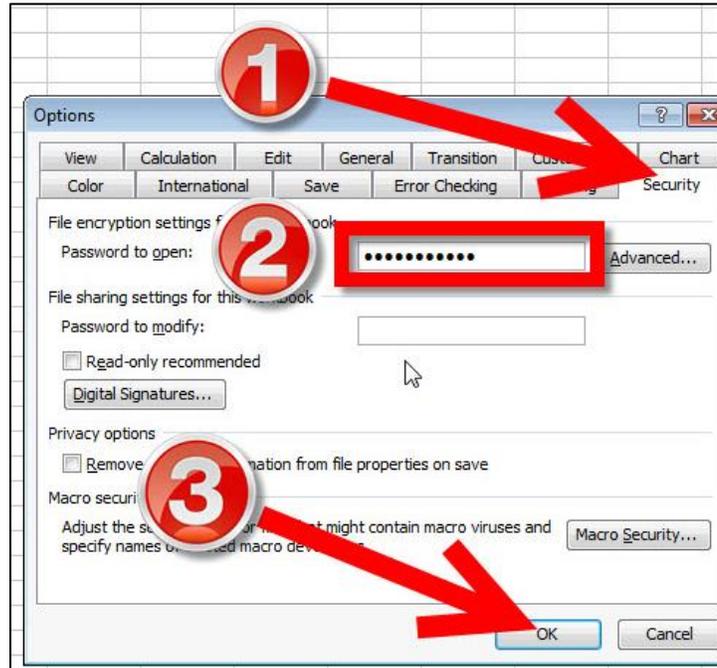
IDENTIFY OFFICE 2007 AND PASSWORD PROTECT

Office 2007 introduced tabs and the **Microsoft Office Button** and a tab menu.

- Click the **MICROSOFT OFFICE BUTTON** > **EXCEL OPTIONS**.

In the **OPTIONS** dialog box, click **RESOURCES**. Find the version
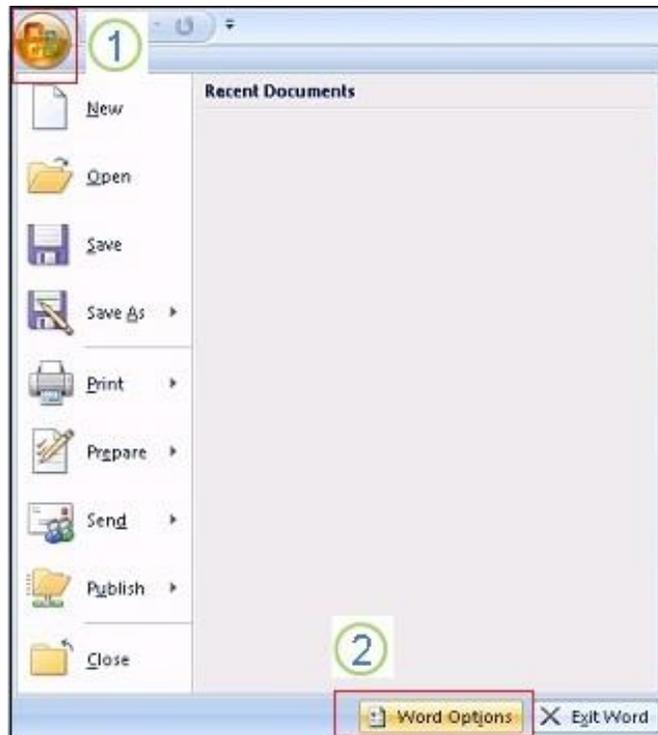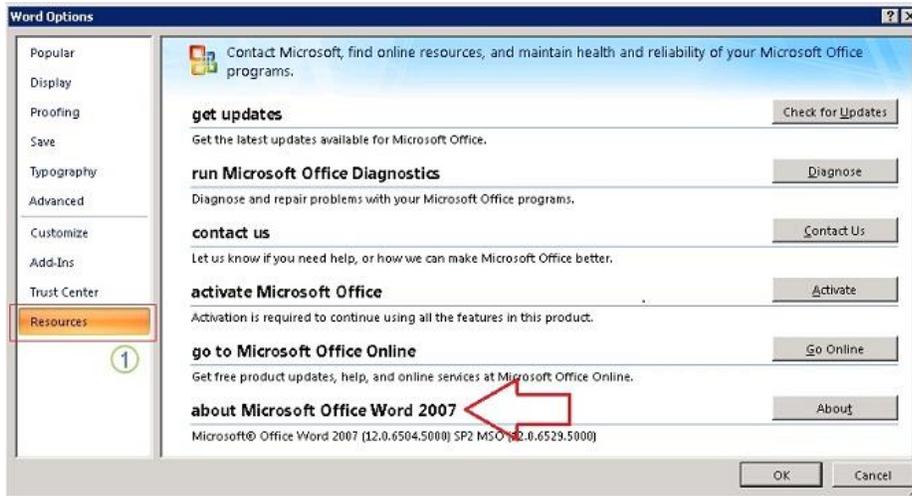
PASSWORD PROTECT IN EXCEL 2007

Click the **MICROSOFT OFFICE** Button > **SAVE AS**. Use the down arrow in the address box (top) to navigate to where you plan to save the document. Enter the document name and click **Save.**
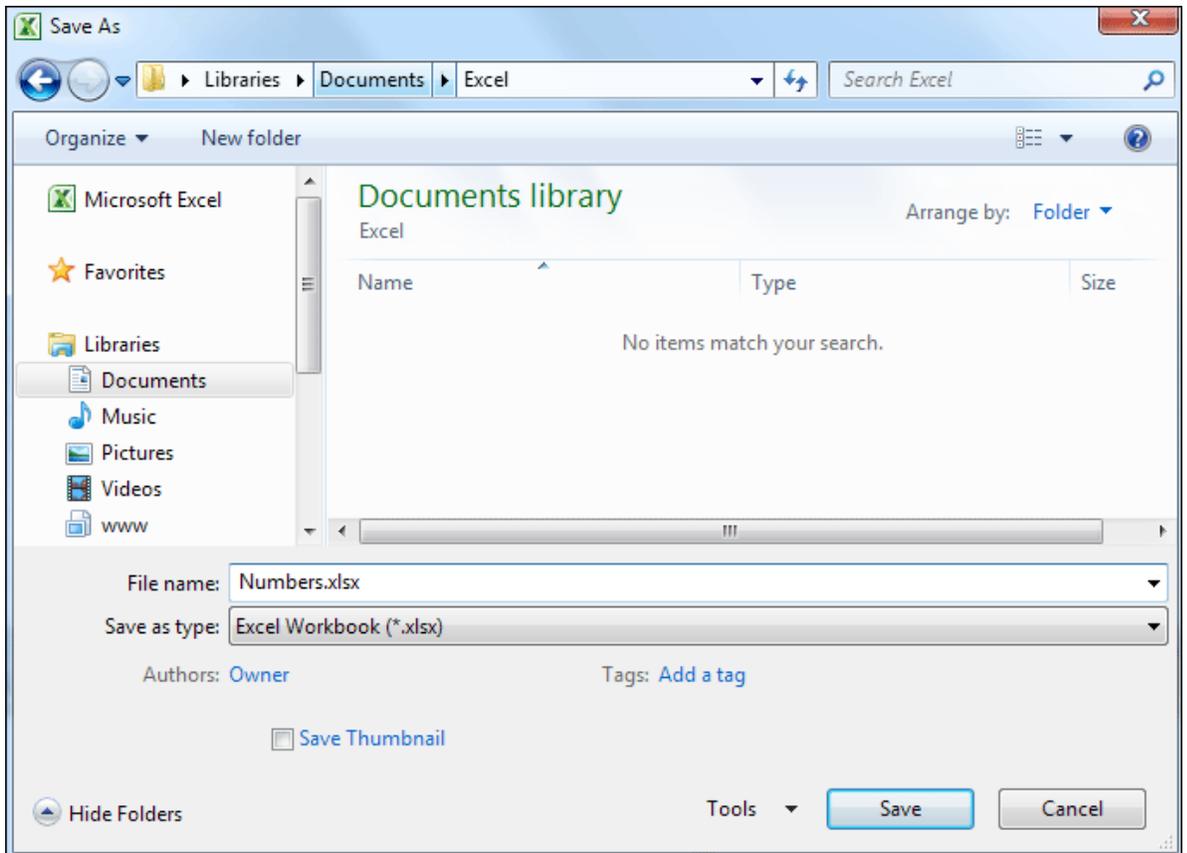
Click the **MICROSOFT OFFICE** button, point to **REPARE**, and then click **ENCRYPT DOCUMENT**.
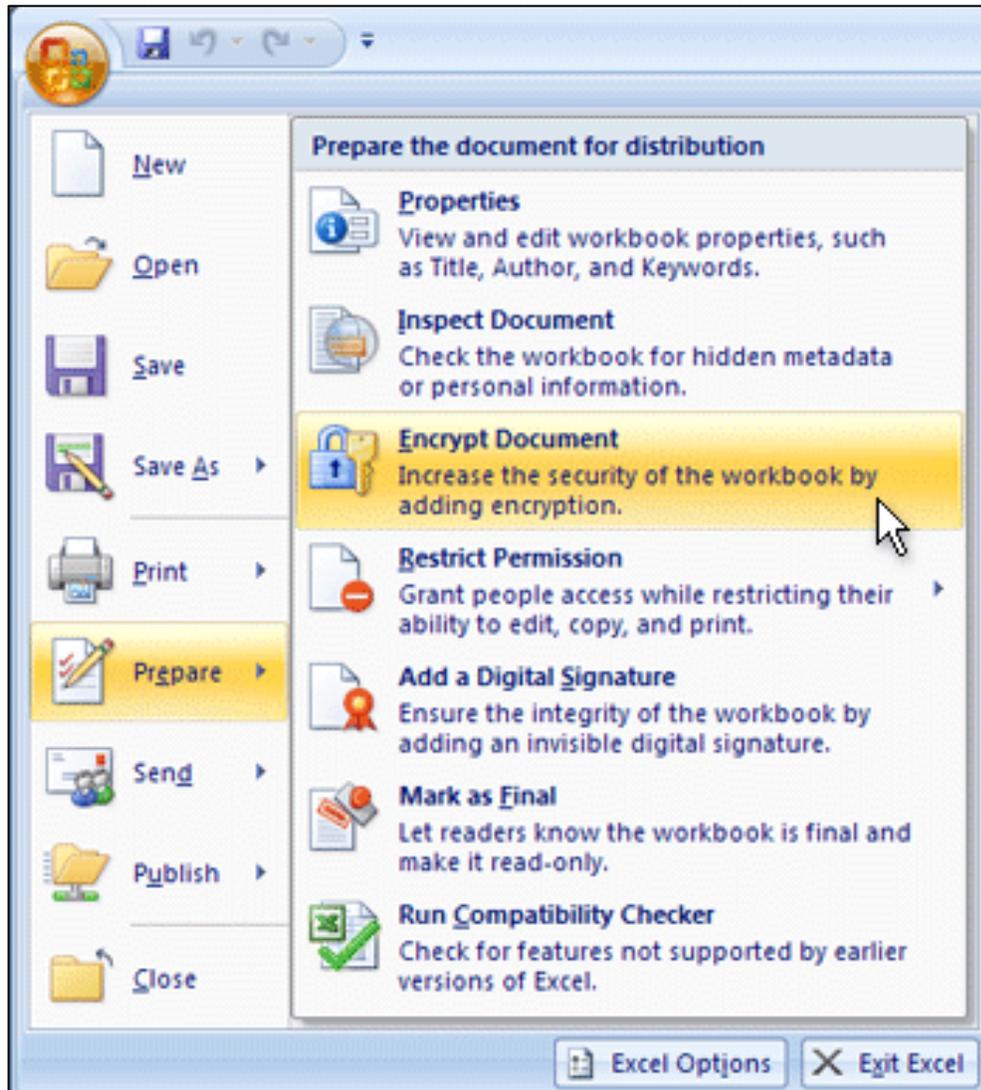
In the **Password** box, type the password and click **OK**

IDENTIFY OFFICE 2010

Office 2010 introduces the **FILE** tab and the Microsoft Office Backstage view

Click **FILE** > **HELP**

Under **PRODUCT ACTIVATED**, find the version.

See Password Protecting instructions on page # 30

OFFICE 2013 AND OFFICE 365

The latest version of Office still uses the File tab and the Microsoft Office Backstage View.

- Click File > Account

Under Product Information, find the version
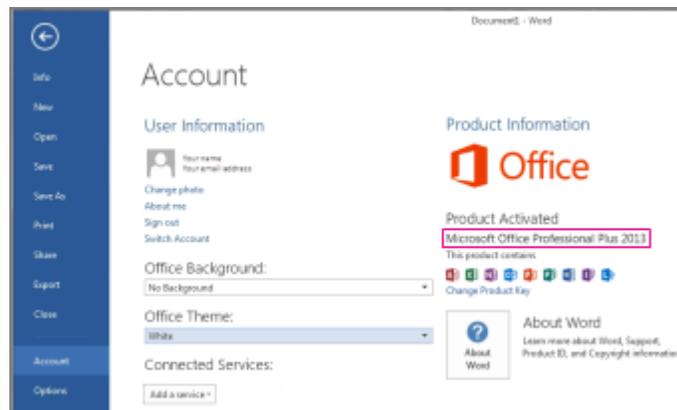
See Password Protecting instructions on page # 30

PASSWORD PROTECT IN EXCEL 2010, 2013 AND OFFICE 365

Click **FILE > SAVE AS**. Use the down arrow in the address box (top) to navigate to where you plan to save the document. Enter the document name. Do not click Save yet.
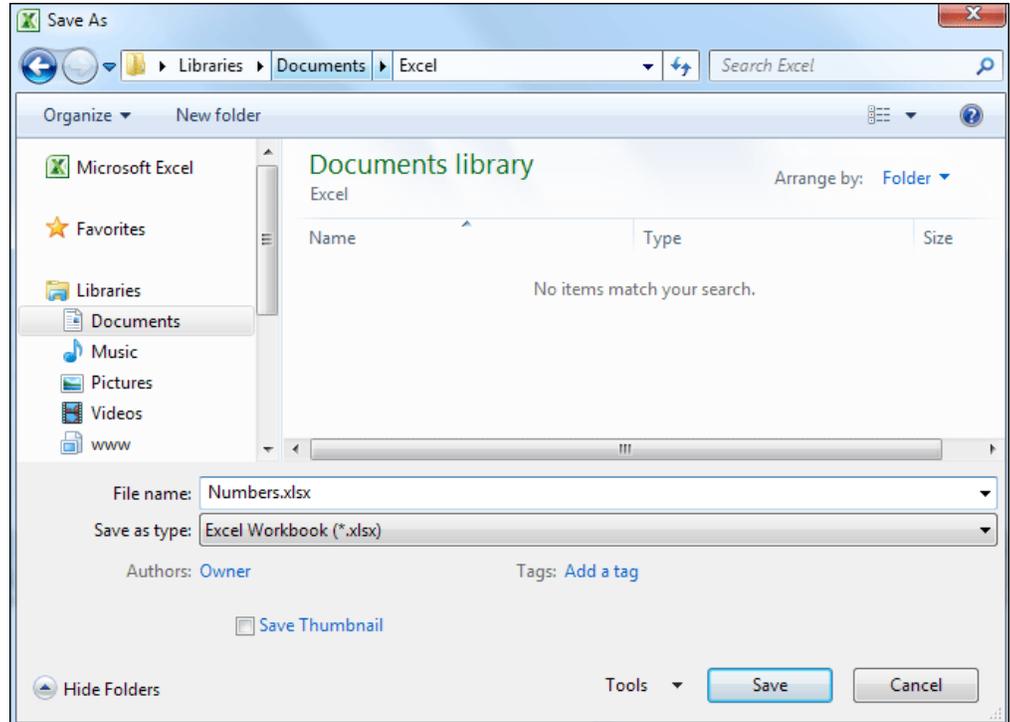
Click on **TOOLS** (bottom right) > **GENERAL OPTIONS**
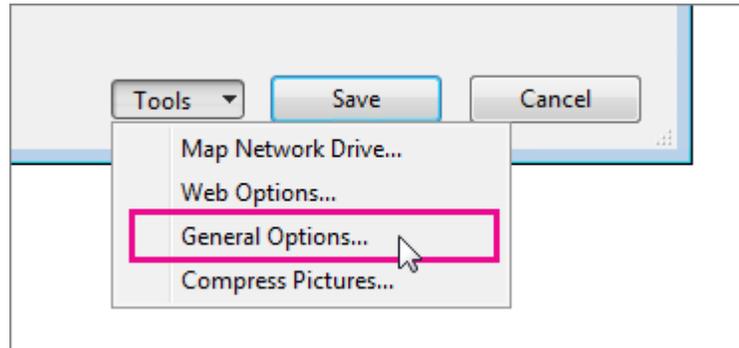
In the **PASSWORD TO OPEN** box, type a password and click **OK**.
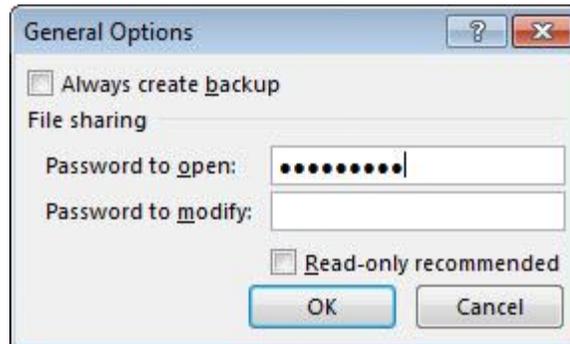
Click **Save**

You will need to remember your password. If you write it down, keep it in a secure location. A best practice is to write down a password hint rather than the actual password.

3E's of Healthy Living —
Education, Exercise and Eating Right

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Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339; or (800) 845-6136 (Spanish).

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