

Form H4529: Authorization to Transfer USDA Foods

Jot Form Transfer Form Instructions

For Receiving and Transferring CEs for CSFP and TEFAP transfers

Order of Completion:

1. Transferring CE completes and submits form.....Page 2
2. Receiving CE is notified, completes, and resubmits form.....Page 7
3. TDA is notified, completes, and submits form in final approval status.....Page 12
4. All CEs are notified of approval status.....Page 12

Authorization to Transfer USDA Foods

Form H4529

Auto-Complete Instructions:

This form uses dynamic drop-down and auto-complete Fields.

1. You can use the drop-down fields to locate the name of the CE and the CE ID or the USDA Food Material Number.
2. Enter the CE ID in the auto-complete fields. Enter leading zeroes as shown. Click on the auto-complete button and the corresponding fields will be completed.

Please note -- Do NOT include the # sign when entering CE IDs and USDA Material Numbers. CE IDs must must have all 5 digits, including leading zeroes.

Notes on completing a transfer form:

- **Selection on the FIRST question – “I am the..” – must be accurate for the form to operate correctly.**
- You will need at both the Transferring and Receiving CE Names to submit the form. If you do not know the CE ID number for either the Transferring or Receiving CE, you can use the drop down menus to look up a CE by name.
- You will need to provide the Material Number, Material Description, and Quantity of the USDA Food(s) to submit the form. If you do not know the USDA Foods Material Number, you can use the drop down menu to look up an item by description.
- CE IDs and USDA Material Numbers should be entered WITHOUT the number sign (#).
- All CE IDs must have 5 digits and MUST include all leading zeroes.

1. Transferring CE Submission

- A. Select "Transferring CE"
 - B. Select the program you are requesting a transfer.
 - D. Verify the date is correct
- > Click "Next"

**Item C does not display and does not apply to CSFP or TEFAP transfers.*

Page Instructions:

- **ALL entities:** Select your role to ensure the rest of the form displays correctly.
- **Transferring CEs:** Complete the remaining fields.
- **Receiving CEs/NSLP Warehouse:** Review the remaining selections.

A. I am the: *

- Transferring CE
- Receiving CE
- NSLP State-Contracted Warehouse
- TDA Representative

B. Select the program: *

CSFP

D. Confirm the date: *

06-15-2021



Next

1. Transferring CE Submission - Continued

- 1.1 Enter your CE ID
- 1.2 Enter your CE Name
- 1.3 Enter the name of the contact most appropriate for transfer updates
- 1.4 Enter the email for this contact

> Click "Next"

NOTE: Only the Authorized Representative will receive notices regarding the transfer submitted

1. Transferring CE Information

Page Instructions:

- Transferring CEs: Complete all fields.
- Receiving CEs/NSLP Warehouse: Review all selections.

Transferring CE Lookup

	SAN ANTONIO FOOD BANK	▼
	#01530	▼

1.1 Transferring CE ID *

1.2 Transferring CE Name *

1.3 Transferring CE - Authorized Representative Name *

1.4 Transferring CE - Authorized Representative Email *

example@example.com

1. Transferring CE Submission - Continued

2.1 Enter the Receiving CE ID and click “Fill Receiving CE Fields

2.2 This will be autofilled.

2.3 This will be autofilled.

2.4 This will be autofilled.

2.5 Enter the name of the Receiving CE contact most appropriate for transfer updates

2.6 Enter the email address for this contact

> Click “Next”

NOTE: If you do not know the appropriate Receiving CE contact for your transfer, you can use the autofilled information to complete the Authorized Representative fields. However, the Authorized Representative does NOT have to be the same as the autofilled contact. Only the Authorized Representative will receive notices regarding the transfer submitted

2. Receiving CE Information

Page Instructions:

- **Transferring CEs:** Complete all fields using the Receiving CE Lookup. Enter the Receiving CE ID into field 2.1 and autofill Receiving CE contact information. Copy this information into the Authorized Representative fields or complete the Authorized Representative fields with another Receiving CE contact.
- **Receiving CEs/NSLP Warehouse:** Review all selections.

Receiving CE Lookup

Central Texas Food Bank, Inc. ▾

#01576 ▾

2.1 Enter the 5-digit CE ID without the # sign. Click the button below to complete the fields. *

01576

Fill Receiving CE Fields

✔ Fields have been auto filled.

2.3 Receiving CE Food Service Director Babs Dobbs

2.4 Receiving CE Food Service Director Email babsdobbs@email.com
example@example.com

*Only the Authorized Representative will be notified of this transfer.

2.2 Receiving CE Name * Central Texas Food Bank, Inc.

2.5 Receiving CE Authorized Representative * Babs Dobbs

2.6 Receiving CE Authorized Representative Email: * babsdobbs@email.com
example@example.com

Back Next

1. Transferring CE Submission - Continued

Look up the USDA Food(s) you are transferring to identify the correct Material Number and/or Material Description. NOTE: Pay close attention to the pack size to ensure you are selecting the correct USDA Food.

3. USDA Foods for Transfer

Page Instructions:

*For NSLP transfers ONLY - TDA will complete the Date Received at Warehouse field(s).

- **Transferring CEs:** Complete all fields using the USDA Material Number Lookup dropdown fields to locate the Material Description and the USDA Item Number. Complete the required Transferring CE confirmation statement(s) at bottom of page. If transferring more than 10 items, you will need to complete an additional form.
- **Receiving CEs:** Review all fields for accuracy. Complete the required Receiving CE confirmation statement(s) at bottom of page.
- **NSLP Warehouse Representatives:** Review all fields for accuracy, inventory availability, and inventory quality. Review Transferring CE and Receiving CE confirmation statements are complete.

USDA Material Number Lookup

ALMOND NATURAL WHOLE SHELL
CTN-12/2 LB

#100907

- 3.1 Enter the USDA Material number listed in the Lookup tool.
 - 3.1.1 Enter the material description as listed in the Lookup tool.
 - 3.1.2 Enter the number of CASES of that item being transferred.
 - 3.1.3 The location of the USDA Foods should correspond to the Transferring CE.
 - 3.1.4 Enter the date of the *oldest* receipt date of the item being transferred.
 - 3.1.5 If you are transferring more than one item, select Yes and complete the fields for the second item.

3.1 Enter the 6-digit USDA Material Number without the # sign. *

100907

3.1.1 Material Description *

Almonds

3.1.2 Number of Cases *

15

3.1.3 Location of USDA Foods *

San Antonio Food Bank

3.1.4 Date Received at Warehouse

01-26-2021

3.1.5 Do you want to add an additional product? *

Yes
 No

1. Transferring CE Submission - Continued

3.11 Complete the acknowledgement statement to confirm the fields completed so far are accurate. You can use the “Back” buttons to review if needed.

> Click “Next”

3.11 For Transferring CE Use Only * I have reviewed the information on this form and verified the information is accurate.

3.12 Transferring CE (NSLP/SFSP Only) I affirm that the contact information and signatures do not include a Food Service Management Company (FSMC) employee or third-party vendor working on behalf of the CE.

[Back](#) [Next](#)

> Click “Submit”

Thank you for completing Form H4529. You will receive a confirmation email when the transfer is finalized.

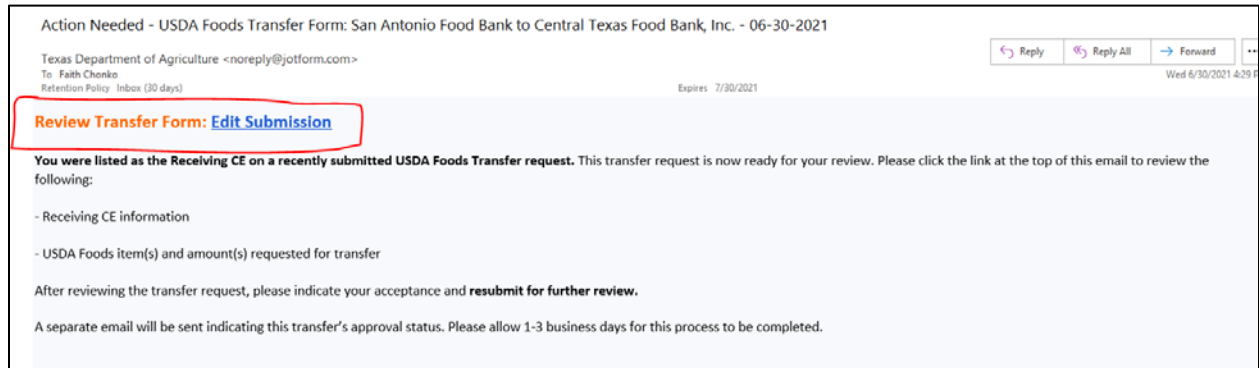
[Submit](#)

[Back](#)

The Transferring CE Authorized Representative will receive an email confirming the transfer request has been received.

2. Receiving CE Submission

The Receiving CE Authorize Representative will be notified of the transfer request and will be instructed to review the form next.



A. Change the selection to “Receiving CE”

B-D. Verify the information is correct.

> Click “Next”

Page Instructions:

- **ALL entities:** Select your role to ensure the rest of the form displays correctly.
- **Transferring CEs:** Complete the remaining fields.
- **Receiving CEs/NSLP Warehouse:** Review the remaining selections.

A. I am the: *

Transferring CE

Receiving CE

NSLP State-Contracted Warehouse

TDA Representative

B. Select the program: * CSFP

D. Confirm the date: * 06-16-2021

Next

2. Receiving CE Submission - Continued

1.1-1.4 Review the completed information.

> Click "Next"

1. Transferring CE Information

Page Instructions:

- Transferring CEs: Complete all fields.
- Receiving CEs/NSLP Warehouse: Review all selections.

Transferring CE Lookup

	SAN ANTONIO FOOD BANK
	#01530

1.1 Transferring CE ID *

1.2 Transferring CE Name *

1.3 Transferring CE - Authorized Representative Name *

1.4 Transferring CE - Authorized Representative Email *

example@example.com

2. Receiving CE Submission - Continued

2.1-2.6 Review the completed information.

NOTE: The Authorized Representative can be edited if needed.

> Click "Next"

2. Receiving CE Information

Page Instructions:

- **Transferring CEs:** Complete all fields using the Receiving CE Lookup. Enter the Receiving CE ID into field 2.1 and autofill Receiving CE contact information. Copy this information into the Authorized Representative fields or complete the Authorized Representative fields with another Receiving CE contact.
- **Receiving CEs/NSLP Warehouse:** Review all selections.

Receiving CE Lookup

Central Texas Food Bank, Inc. ▾

#01576 ▾

2.1 Enter the 5-digit CE ID without the # sign. Click the button below to complete the fields. *

01576

Fill Receiving CE Fields

✔ Fields have been auto filled.

2.3 Receiving CE Food Service Director Babs Dobbs

2.4 Receiving CE Food Service Director Email babsdobbs@email.com
example@example.com

*Only the Authorized Representative will be notified of this transfer.

2.2 Receiving CE Name * Central Texas Food Bank, Inc.

2.5 Receiving CE Authorized Representative * Babs Dobbs

2.6 Receiving CE Authorized Representative Email: * babsdobbs@email.com
example@example.com

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2. Receiving CE Submission - Continued

3.1-3.5 Review completed information to verify the items/quantities are correct.

3. USDA Foods for Transfer

Page Instructions:

*For NSLP transfers ONLY - TDA will complete the Date Received at Warehouse field(s).

- **Transferring CEs:** Complete all fields using the USDA Material Number Lookup dropdown fields to locate the Material Description and the USDA Item Number. Complete the required Transferring CE confirmation statement(s) at bottom of page. If transferring more than 10 items, you will need to complete an additional form.
- **Receiving CEs:** Review all fields for accuracy. Complete the required Receiving CE confirmation statement(s) at bottom of page.
- **NSLP Warehouse Representatives:** Review all fields for accuracy, inventory availability, and inventory quality. Review Transferring CE and Receiving CE confirmation statements are complete.

USDA Material Number Lookup

ALMOND NATURAL WHOLE SHELL
CTN-12/2 LB

#100907

3.1 Enter the 6-digit USDA Material Number without the # sign. *

100907

3.1.1 Material Description *

Almonds

3.1.2 Number of Cases *

15

3.1.3 Location of USDA Foods *

San Antonio Food Bank

3.1.4 Date Received at Warehouse

01-26-2021

2. Receiving CE Submission - Continued

3.13 Complete the acknowledgement statement to confirm the fields completed so far are accurate. You can use the “Back” buttons to review if needed.

3.13 For Receiving CE Use Only *	<input checked="" type="checkbox"/> I have reviewed the information on this form and verified the information is accurate.
3.14 Receiving CE (NSLP/SFSP Only)	<input type="checkbox"/> I affirm that the contact information and signatures do not include a Food Service Management Company (FSMC) employee or third-party vendor working on behalf of the CE.

[Back](#) [Next](#)

> Click “Submit”

Thank you for completing Form H4529. You will receive a confirmation email when the transfer is finalized.

[Submit](#)

[Back](#)

3. TDA Representative Submission

The TDA Representative will receive an email notice that the transfer is ready for review and determine the final transfer approval status after reviewing the completed submission.

5. TDA Approval

TDA Use Only

5.1 Transfer Approval Status

- The transfer is approved.
 The transfer is not approved.

5.2 If Not Approved, please explain:

5.3 Allocation Name:

5.4 TDA Representative

First Name Last Name

5.5 TDA Representative Email

example@example.com

5.6 Confirm the date:


Date

4. Final Status Notice

Both the Transferring CE and Receiving CE Authorized Representatives will be notified of the transfer's approval status.

Transfer Approved - USDA Foods Transfer Form: San Antonio Food Bank to Central Texas Food Bank, Inc. - 06-18-2021

Texas Department of Agriculture <noreply@jotform.com>
To: Faith Chonko
Retention Policy | Inbox (30 days)

Expires 7/18/2021

This transfer is approved.

Please save a copy of this form for your records.

NSLP Transfers - Receiving CEs can now place the transferred cases on an order.

CSFP/TEFAP Transfers - CEs can now arrange for the transfer of items.