snacs
School Nutrition Accountability Software

SNACS

SFA User Manual — Eligibility Certification

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Wisconsin Department of Public Instruction
SNACS SFA User Manual – Eligibility Certification

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⮜ End of Contents ⮞

Chapter 1: Getting Started

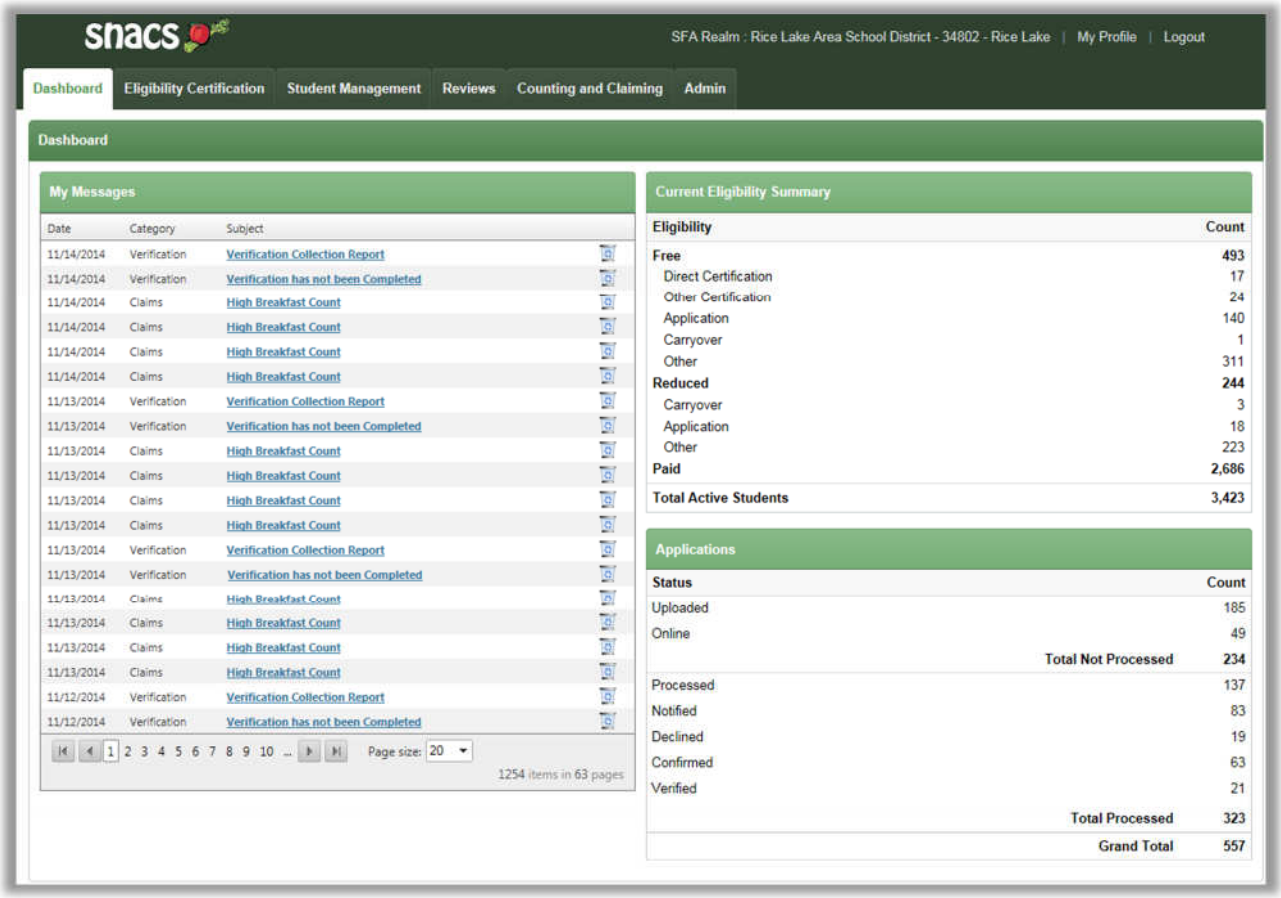
In this chapter you will learn:

- ✓ About Dashboard messages and widgets
- ✓ How to navigate in the SNACS window.
- ✓ How to log out of SNACS.
- ✓ How to use this manual.

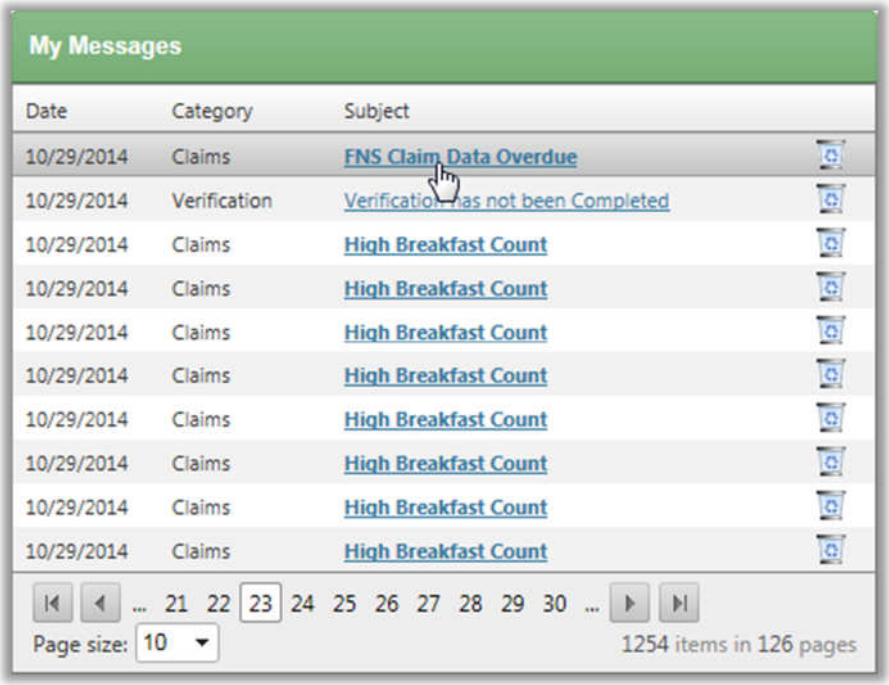
Dashboard

When you first login, the **Dashboard** tab appears. This tab provides

- Messages regarding filing claims and reminders of critical Verification dates – list is updated each evening; messages shown in bold type are unread messages; messages shown relate to your function with SNACS; messages must be manually removed; see Appendix B: Messages.
- Current Eligibility Summary counts – separate counts for each eligibility are shown along with the total number of active students; data is read only.
- Free and Reduced Price Meal Application details – shown when SNACS is used to process applications for free or reduced-price meals; data is read only.

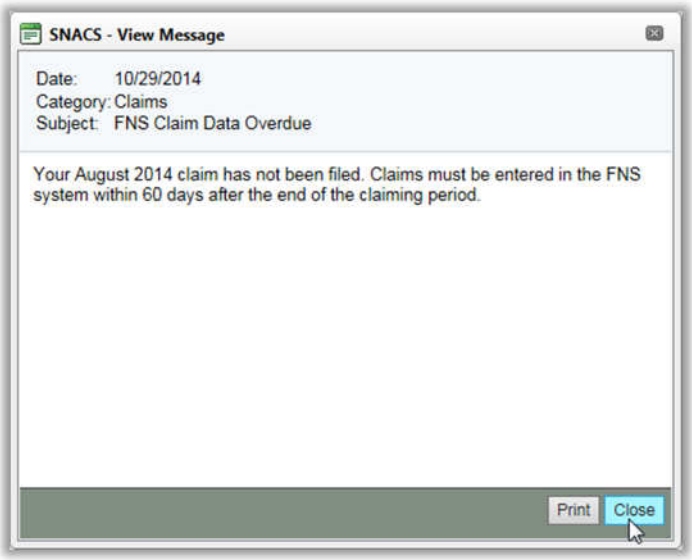


Viewing a Message



In the **My Messages** list

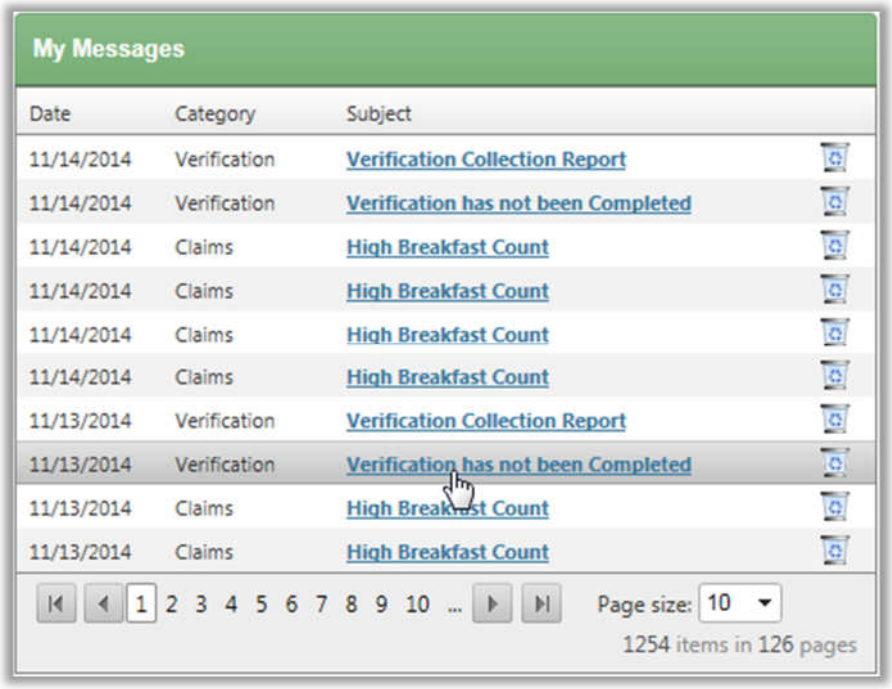
- Click a **Subject** link in a message listing.



The message appears in the **View Message** popup.

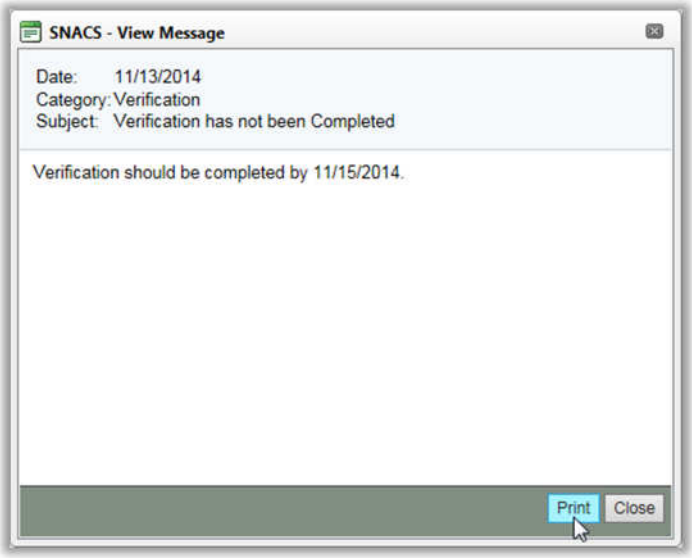
- Click Close to close the **View Message** popup.

Printing a Message



In the **My Messages** list

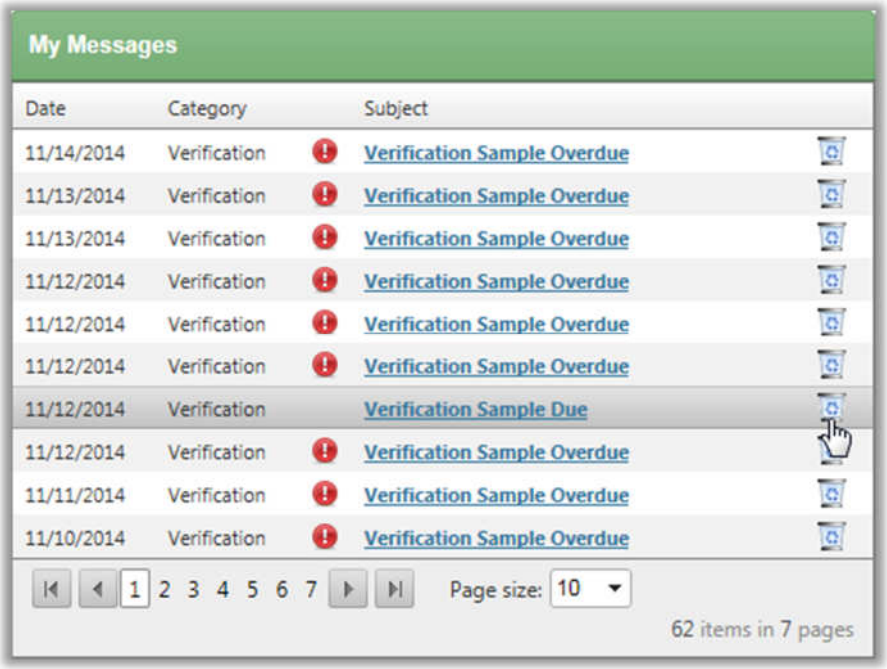
- Click a **Subject** link in a message listing.



The message appears in the **View Message** popup.

- Click Print to send the message to the printer.

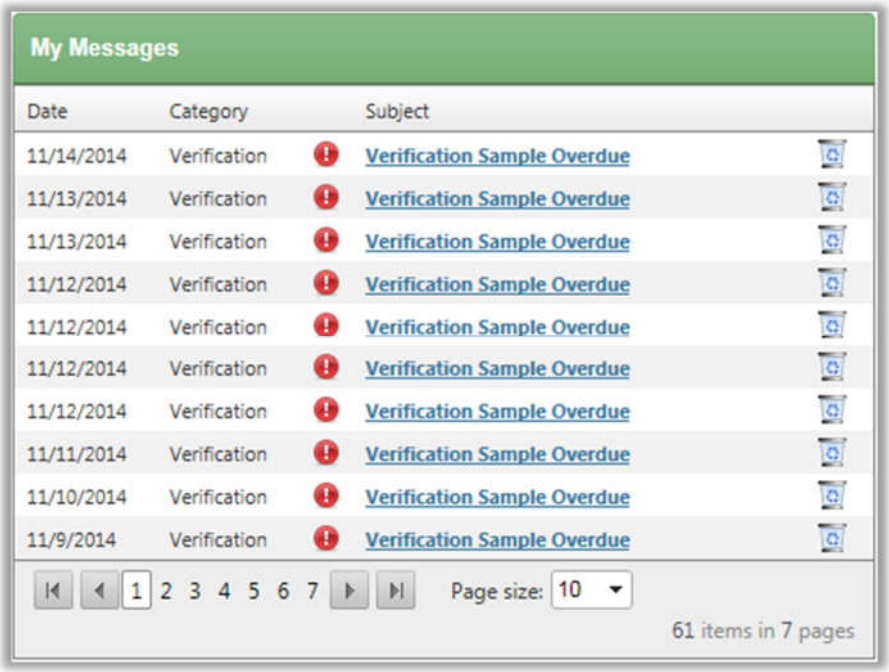
Deleting a Message



In the **My Messages** list

- Click **Delete** ( ) in a message listing.

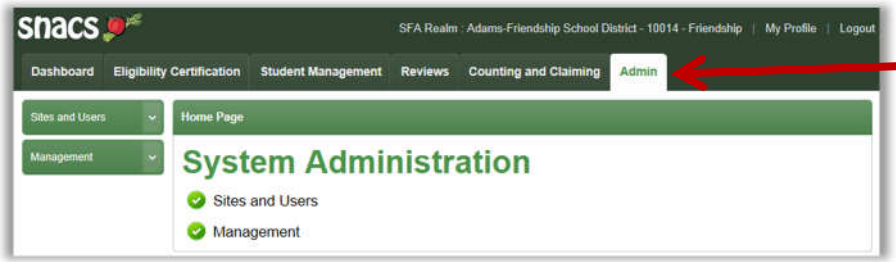
Caution!
You are not prompted to confirm the deletion. Deleted messages cannot be retrieved.



The message is removed from the list.

Module Navigation

When you log in to SNACS you see one or more modules that your user-role has permission to access. You will see one tab for each module.



To access a module

Click the module tab.

The module home page is displayed.

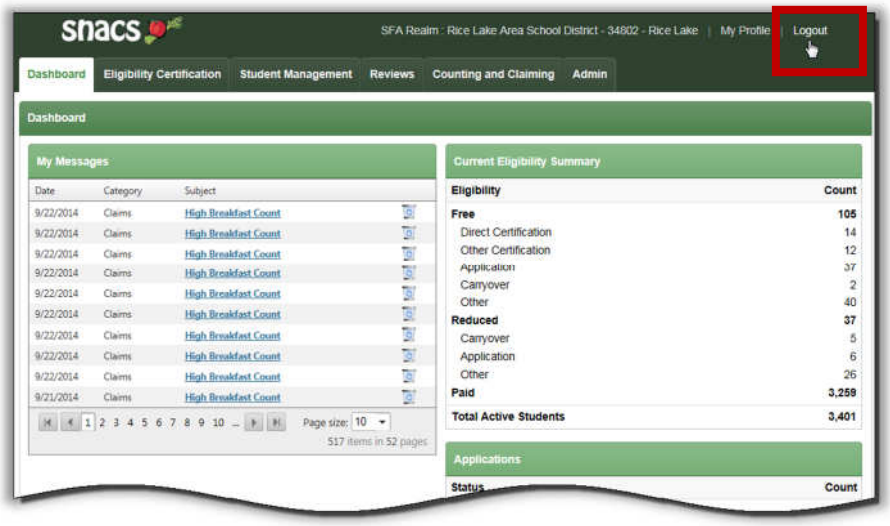
The **Admin** module offers two (2) categories in the navigation bar on the left of the SNACS web page.

Note

Categories and menu selections to which you have access are those appropriate for your role within SNACS. Therefore, when you log in to SNACS, you may see a subset of the tabs and categories shown above, or you may see a subset of the menu selections that are reviewed in this manual.

Log Out of SNACS

Logging out of SNACS can be performed from any page.



To log out of SNACS from any page

- Click **Logout**.

The Wisconsin Department of Public Instruction page is displayed.

For security reasons, you should close your browser if you do not want to immediately login to other DPI online programs or services.

How to Use This Manual

Style conventions are used to help you relate what you see in this book to what you see on the SNACS website.

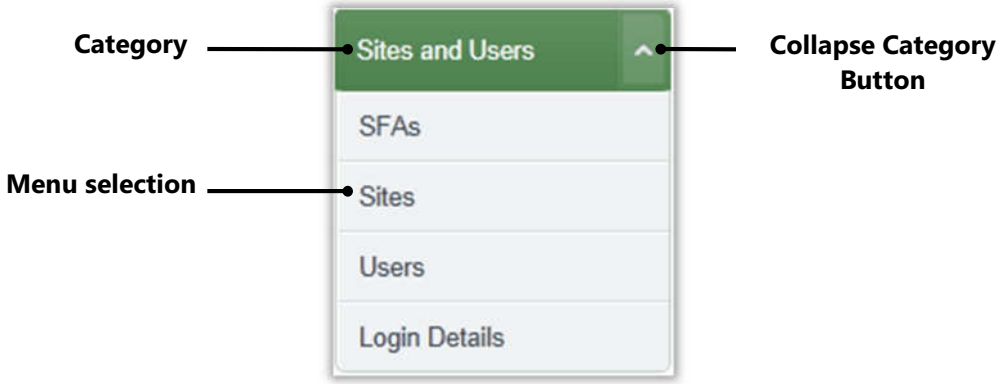
Text Conventions

Item	Convention	Example
Button	Graphic as seen on page	Click Apply .
Clickable icon	Icon name in bold followed by graphic	Click **Calendar** ( ).
Clickable link	Bold, underlined	Click the **User Name** in the **User Name** column.
Field name	Bold, underlined, capitalization as seen on page	In **Role**, select a role. In **First Name**, enter the user's first name.
Group name	Bold, capitalization as seen on page	In the **User Profile** group… In the **Roles** group…
Key name	Small caps	TAB key ENTER key
Category name	Bold, title caps	The **Sites and Users** category is…
Menu selection	Bold, capitalization as seen on page	Select **Login Details** on the…
Message	Italics, enclosed in quotes, capitalization as seen on page	"*User successfully updated.*"
Module Name	Bold, title caps, enclosed with square brackets	**[Admin]**
Page name	*Italics*, title caps	On the *Site Details* page…
Selection sequence	Bold, capitalization as seen on page, separated with ">"	**[Admin] > Management >Eligibility Guidelines**
Window name	Italics, title caps	In the *Report Viewer* window, click…

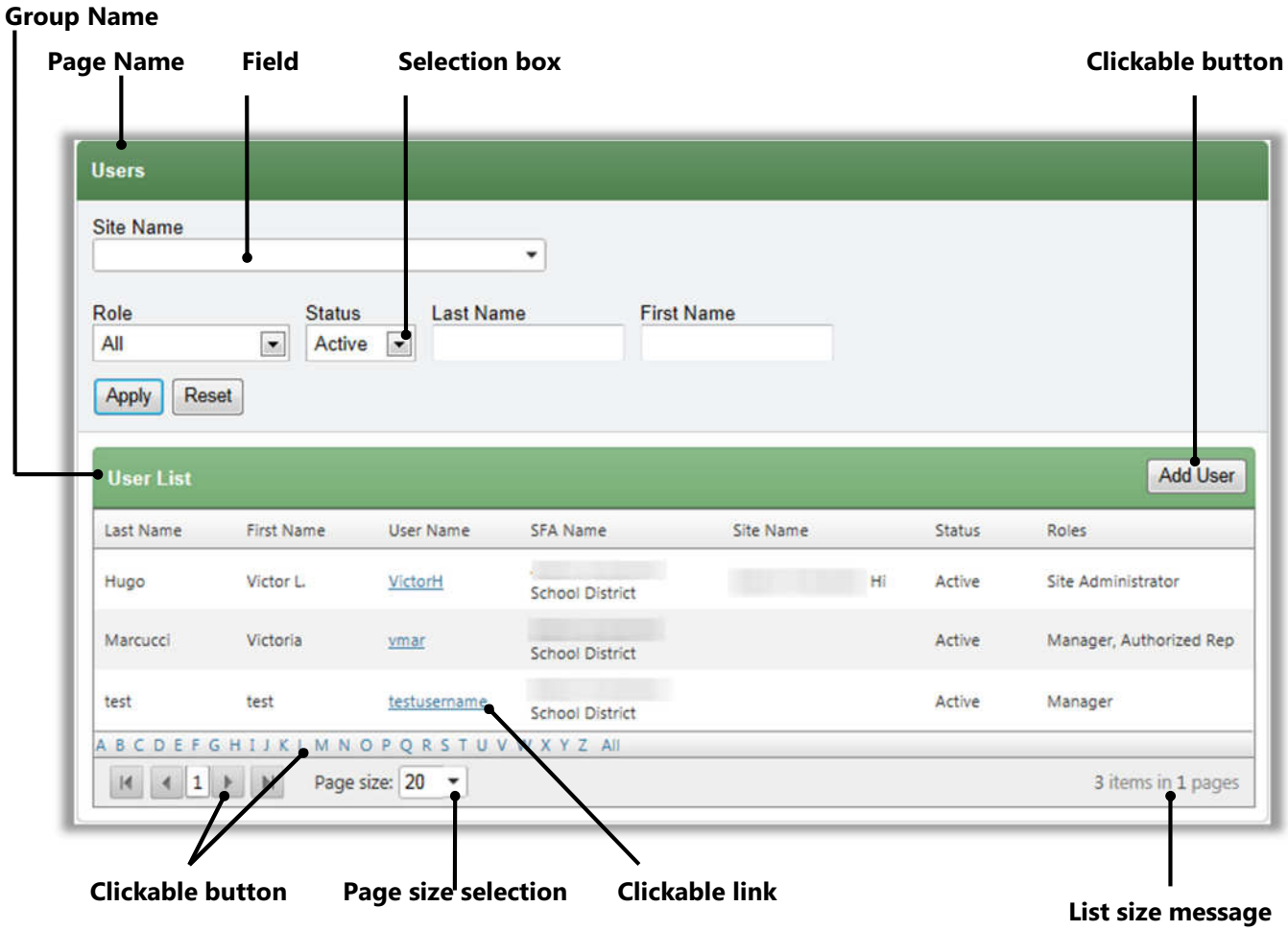
Table 1.1 Text Conventions

Category and Page Conventions

Categories



Pages



Icon Conventions

Several icons are used in this manual to alert you to particular information that is critical or helpful to your use of SNACS.

Icon	Name	What it means
	Note	Additional information on the use or operation of the command or topic.
	Careful!	Information that is critical to the use of the feature or menu selection.
✓	**Tip**	Information that may help to use the feature more effectively.

Table 1.2 Icon Conventions

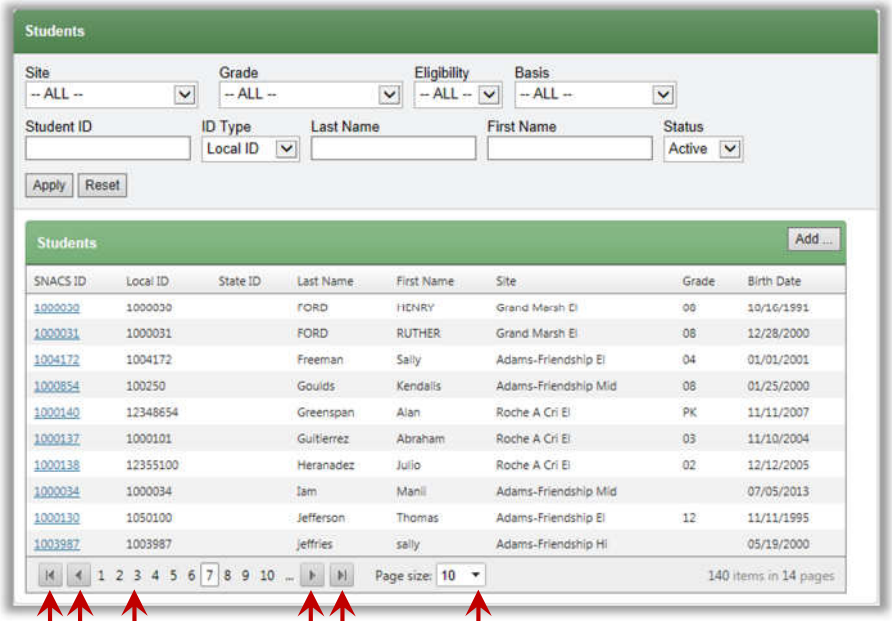
Message Conventions

Messages are displayed above the page name. The following message conventions are used in the software.

Message Type	What it means	Example
Confirmation	Affirms the success of the operation; no action is required.	User has been added successfully.
Error	Indicates that an error has been made; action is required to successfully complete the operation.	Please complete all required fields.

Table 1.3 Message Conventions

Using List Display Controls



Some pages display listings on multiple pages. Display controls are provided below the listings to move between the pages.

Two types of controls are provided:

Page controls:

To change the number of listings displayed on a page, select a number from **Page size** drop-down list.

To display the last page of listings, click .

To display the next page of listings, click .

To display a specific page of listings, click number button such as 1.

To display the previous page of listings, click .

To display the first page of listings, click .

➤ *End of Chapter* ➢

Chapter 2: Applications

In this chapter you will learn how to:

- ✓ Upload application images or a file with application data for validation processing.
- ✓ Manually create, view, and update an application in the Validate window.
- ✓ Validate an individual application or all applications in a batch.
- ✓ View and print notification letters.
- ✓ Search for, display, and update an application.

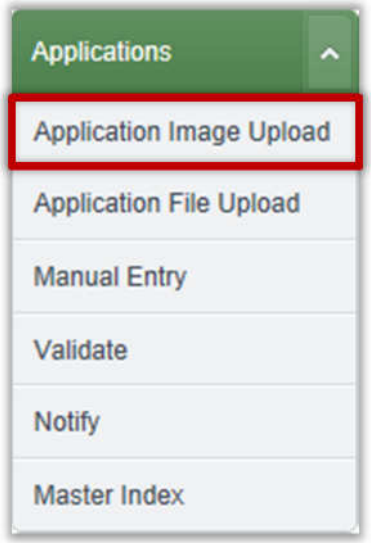
Applications at a Glance

Menu Selection	Description
Application Image Upload	Uploads one or more application images for validation processing.
Application File Upload	Uploads a file of application data to SNACS.
Manual Entry	Create and view an application where all information is entered through the keyboard.
Validate	Validate an individual application or all applications in a batch.
Notify	View and print notification of benefits letters for an individual application or for all applications in a batch or for all applications in all batches.
Master Index	Search for and view applications.

Table 2.1 Applications Menu Functions

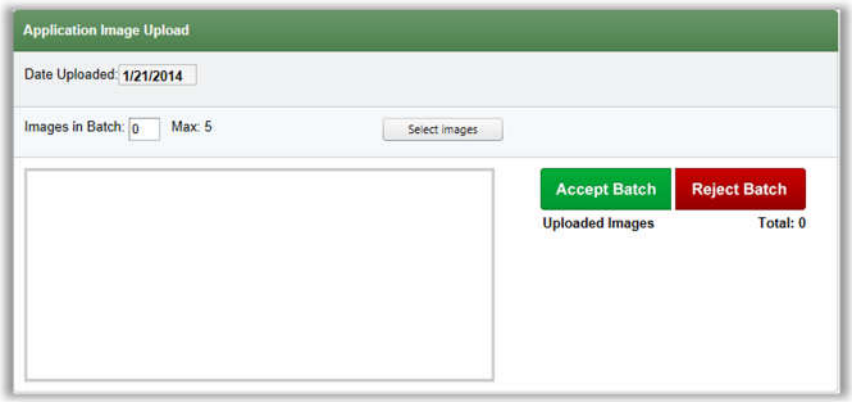
Note
Categories and menu selections to which you have access in SNACS are those appropriate for your assigned role(s). When you access the **Applications** menu, you may see a subset of the menu selections listed above.

Application Image Upload



The Application Image Upload function uploads one or more images of applications. Images are uploaded in a "batch" which can be either accepted or rejected (discarded).

When an image batch is accepted, the batch can be processed through the **Validate** function in the same manner as manual applications. Select "Accepted" in **Batch Status** to open the Validation Workspace.



By default, on the *Application Image Upload* page

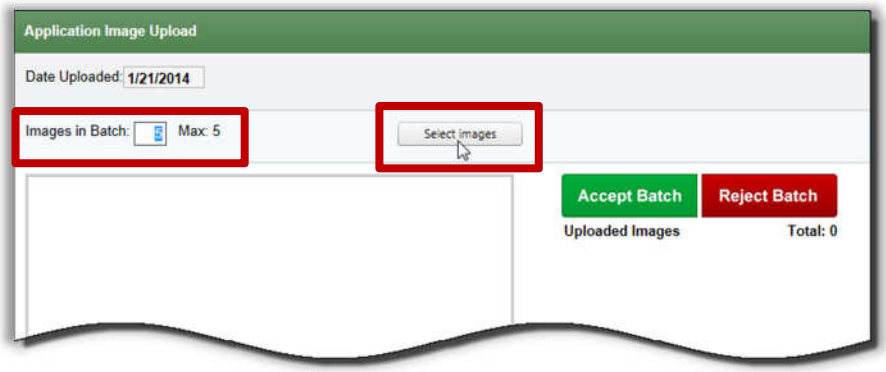
- **Date Uploaded** displays the current date
- **Images in Batch** displays "0" (zero)
- Image viewer is blank.

Page Functions

Field/Button	Description
Select images	Click to select images for the upload process.
Accept Batch	Click to accept the uploaded images.
Reject Batch	Click to discard the uploaded images.

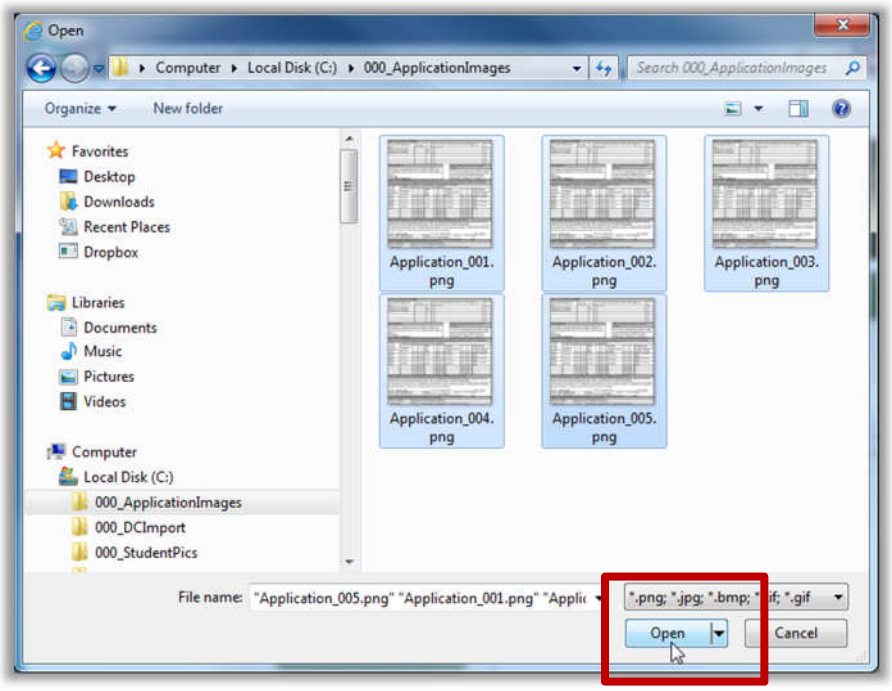
Table 2.2 Application Image Upload Page Functions

Uploading and Accepting Application Images



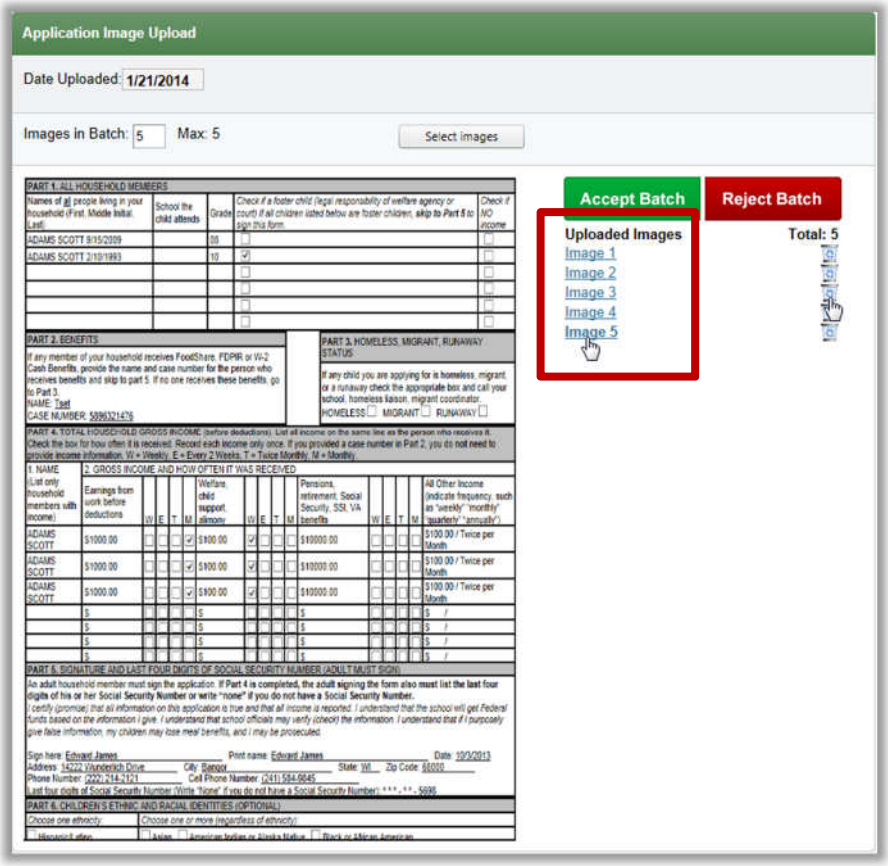
On the **Application Image Upload** page

- Enter the number of **Images in Batch**.
- Click Select images .



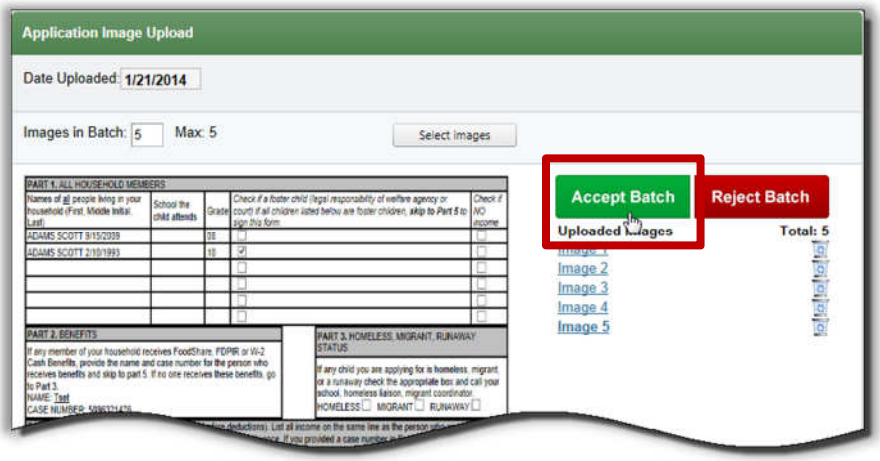
In the **Open** popup

- Use standard Windows navigation techniques to select one or more application image files.
- Click Open .



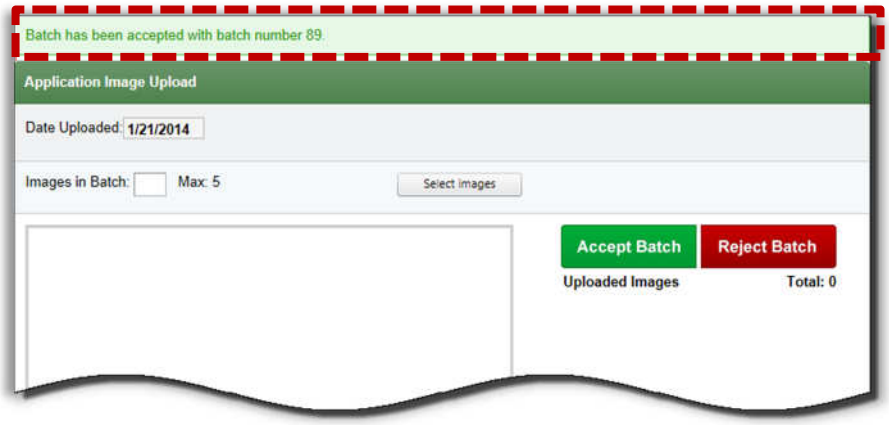
The uploaded image file names appear on the right.

- Click on each image name to inspect the image in the image viewer.
- Click **Delete** ( )in an image listing to remove the image from the batch, if needed.



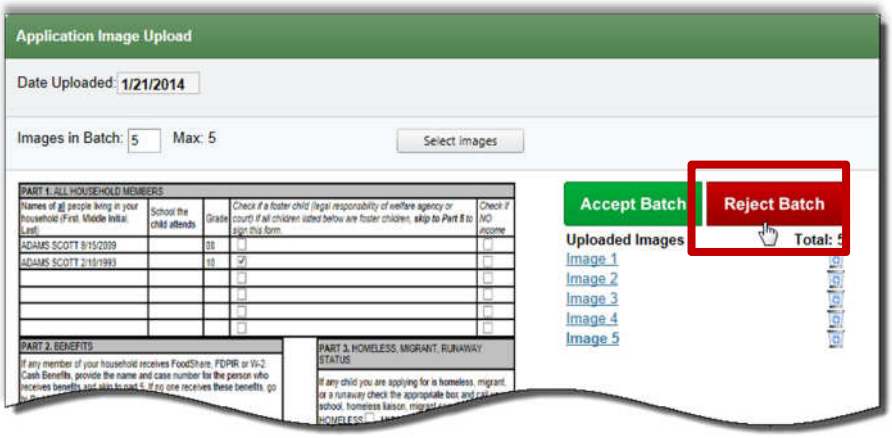
After all images have been inspected in the image viewer

- Click **Accept Batch** .



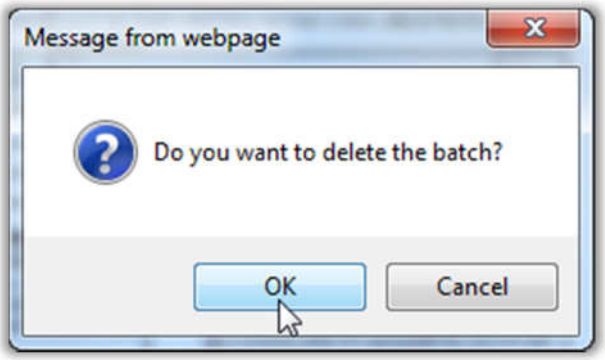
An acceptance message appears with the batch number

Rejecting Application Images

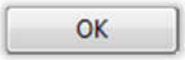


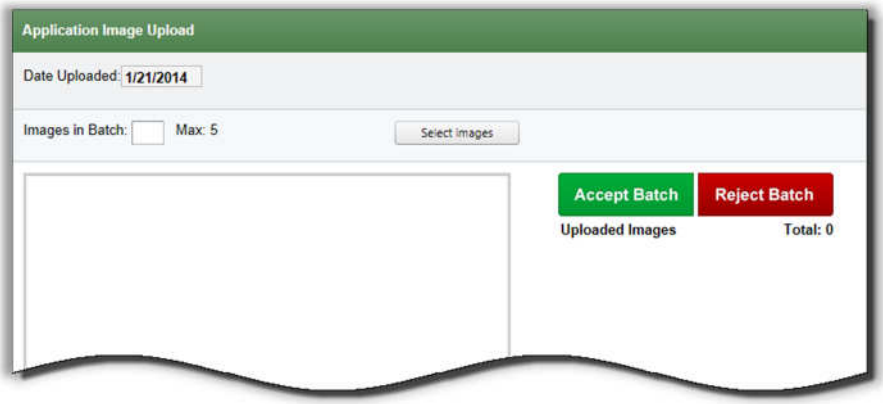
If the batch of images is not what should be uploaded, the batch can be rejected.

- Click



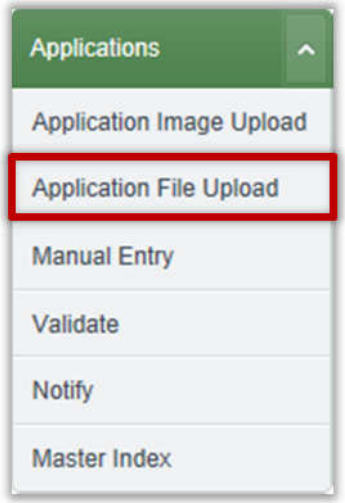
In the confirmation popup

- Click 



The **Application Image Upload** page reappears. All fields have been reset to default values.

Application File Upload



The **Application File Upload** function uploads a file of application data for validation processing.

By default, on the *Application File Upload* page no fields are available.

Page Functions

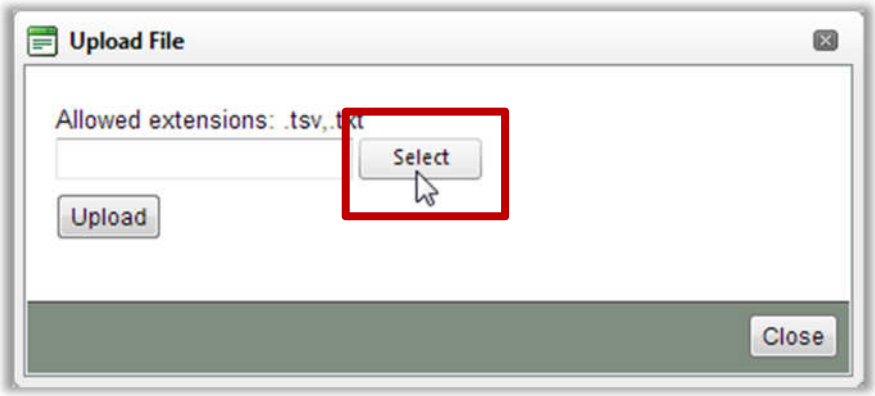
Field/Button	Description
Upload File	Click to start the file upload process.

Table 2.3 Application File Upload Page Functions

Uploading an Application File

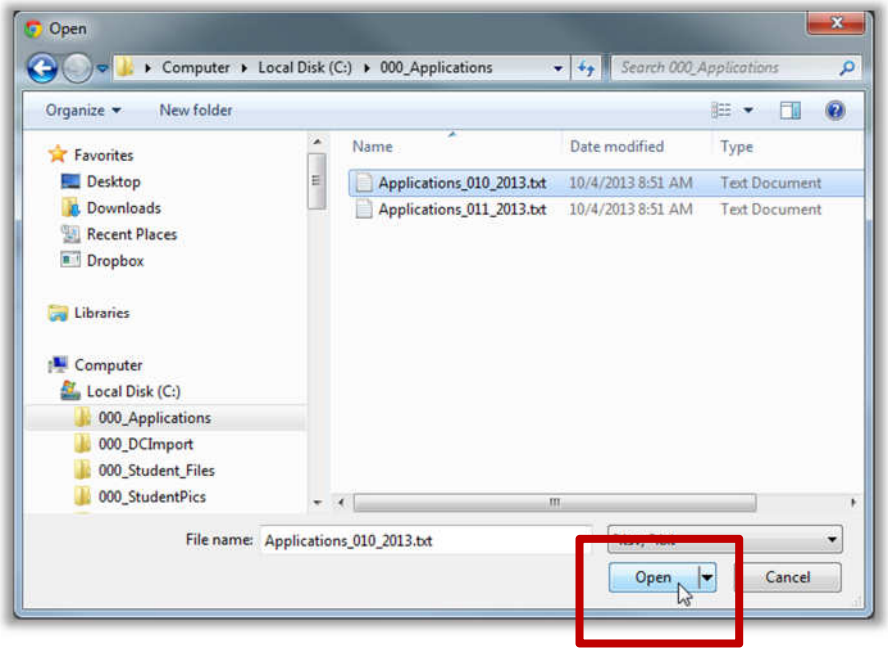
On the *Application File Upload* page

- Click Upload File .



In the **Upload File** popup

- Click Select .



In the Windows **Open** popup

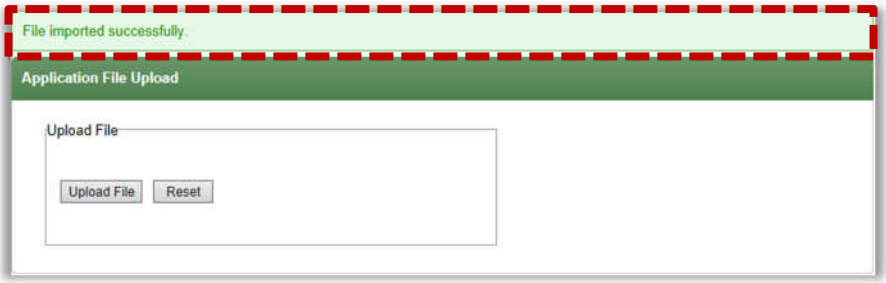
- Use standard Windows navigation techniques to select a file.
- Click Open .

In the **Upload File** popup

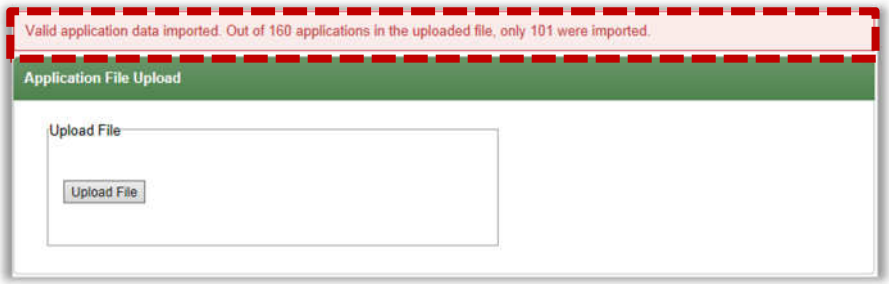
- Click Upload .

On the *Application File Upload* page

- Click Import .



A success message appears.



Or, a message with the number of successful application imports is shown.

Error Messages

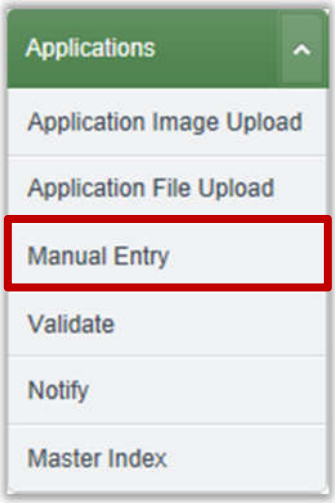
You may encounter error situations when validating uploaded applications, such as the following example.

A minimum of 4 four digits must be provided for the applicant's SSN on an application. If less than four is entered, an error message "Invalid SSN" appears in the details area of the Validation Workspace.

Error	Description
Invalid SSN	The last four digits of the applicant's SSN must be entered on the application; this error is shown when less than four digits have been provided on an uploaded application.
Invalid Date	Shown when a student's birth date is not valid, such as 11/13/2000.
Missing Information	Shown when information is missing in required fields.

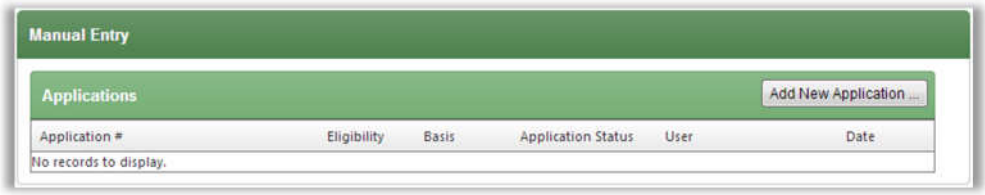
Table 2.4 Application File Upload Errors

Manual Entry



Manual Entry is the process of entering an application "by hand" into SNACS—that is, it is not scanned and it is not entered through the Free and Reduced Price Meal Application website.

As applications are entered, they are collected in batches of 25. When a twenty-sixth application is created it is automatically placed into a new batch.
The first application entered for the day begins a new batch, i.e., if you have entered 10 applications on Monday and then, on Tuesday, enter the next application, the new application is not placed in the Monday batch. The application will be placed in the first Tuesday batch.



By default on the *Manual Entry* page no fields are available.

Page Functions

Field/Button	Description
Add New Application ...	Click to open the Validation Workspace to enter information from a paper application.

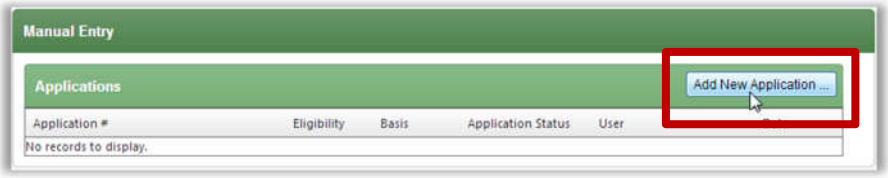
Table 2.5 Manual Entry Page Functions

Manually Adding an Application

Completing a manual application includes

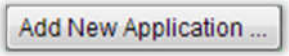
- Step 1—Adding all students in the **Students** group.
- Step 2—Adding all members of the students' household in the **Household Members** group.
- Step 3—Finalizing the application in the application authorization group by supplying the applicant's SSN/indicating that no SSN was provided, amd indicating that the application was/was not signed.

All of the above actions are performed in the window called the *Validation Workspace*.

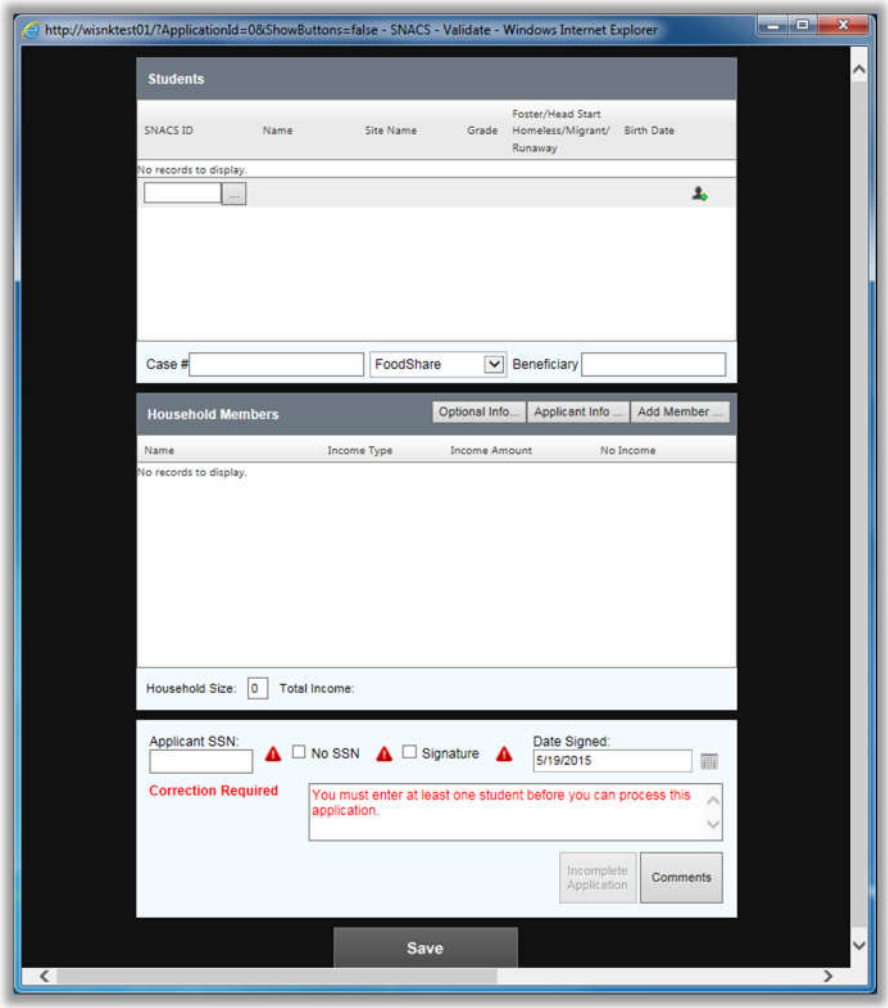


On the *Manual Entry* page:

- Click



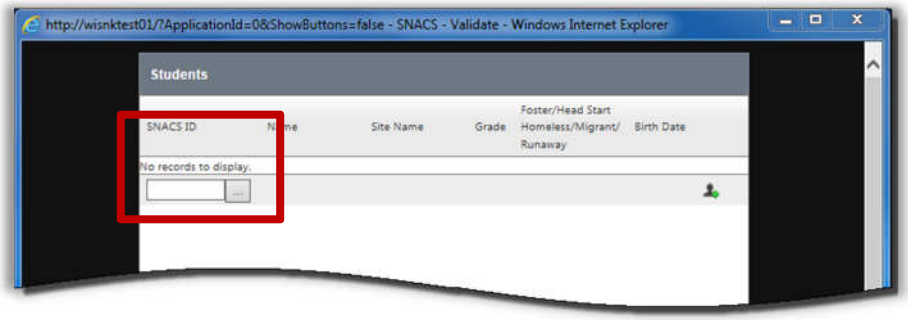
.



The *Validate* window opens. This window is also referred to as the *Validation Workspace*. The *Validation Workspace* includes three groups of information

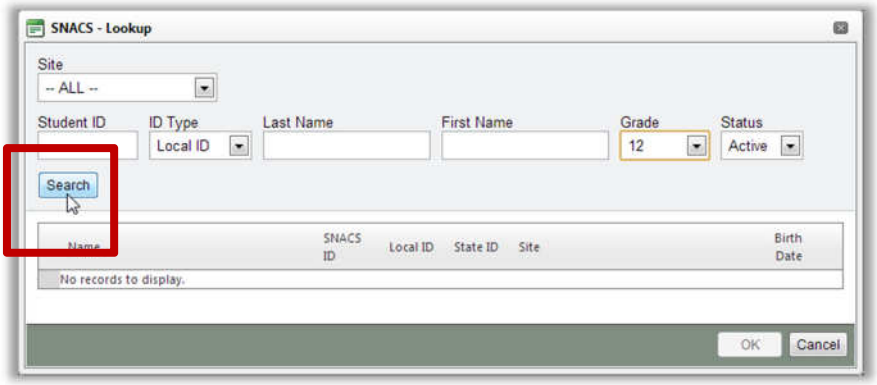
- **Students** group where students are added.
- **Household Members** group where all people living at the residence are added.
- **Details** group where application details, such as Social Security Number (SSN) and Signature are recorded.

Step 1: Students Group—Adding a Student with a SNACS ID



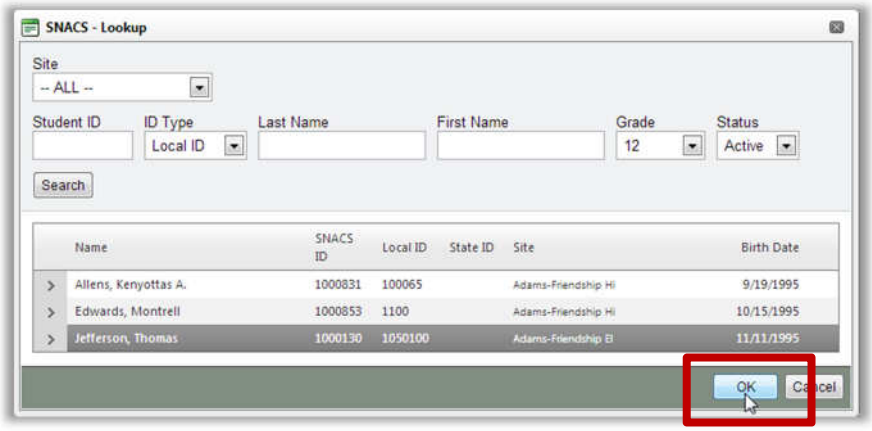
In the **Students** group

- Click **Lookup** (...).



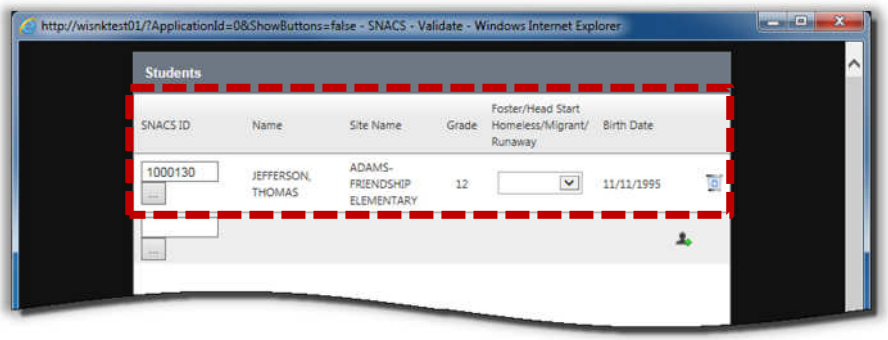
In the **Lookup** popup

- Select one or more search conditions.
- Click Search .



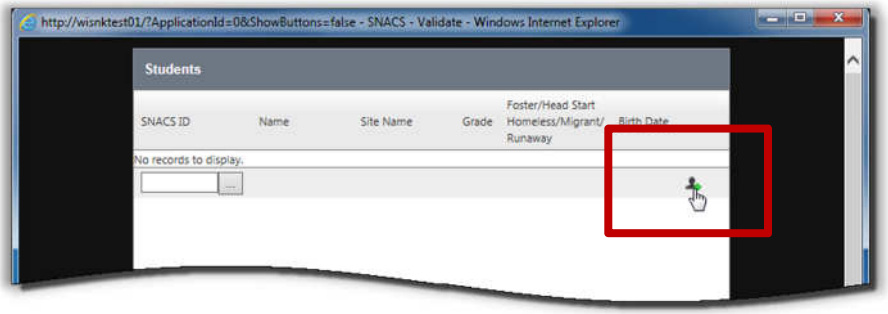
In the list of students that match the search conditions

- Select a student listing.
- Click OK .



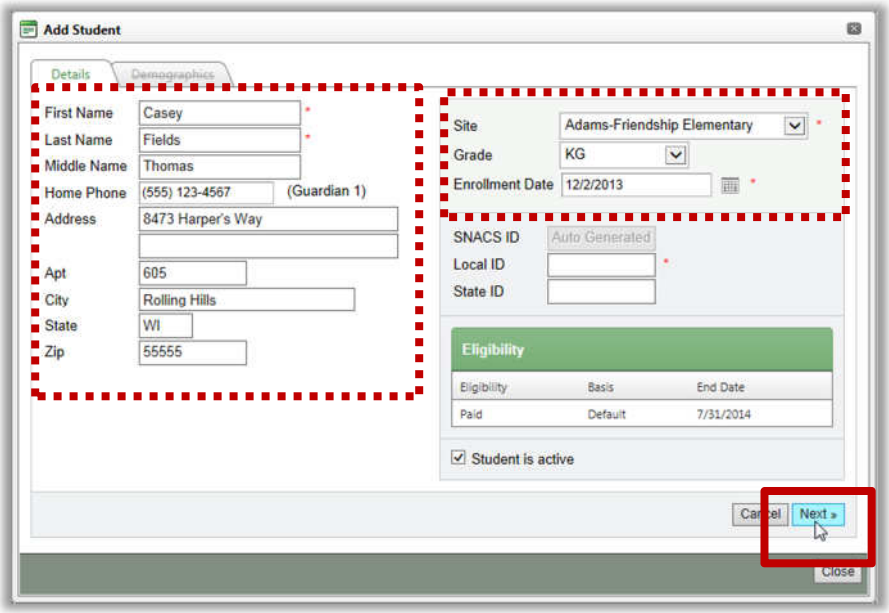
The student's information appears in the **Students** group.

Step 1: Students Group—Adding a Student Not Currently in SNACS



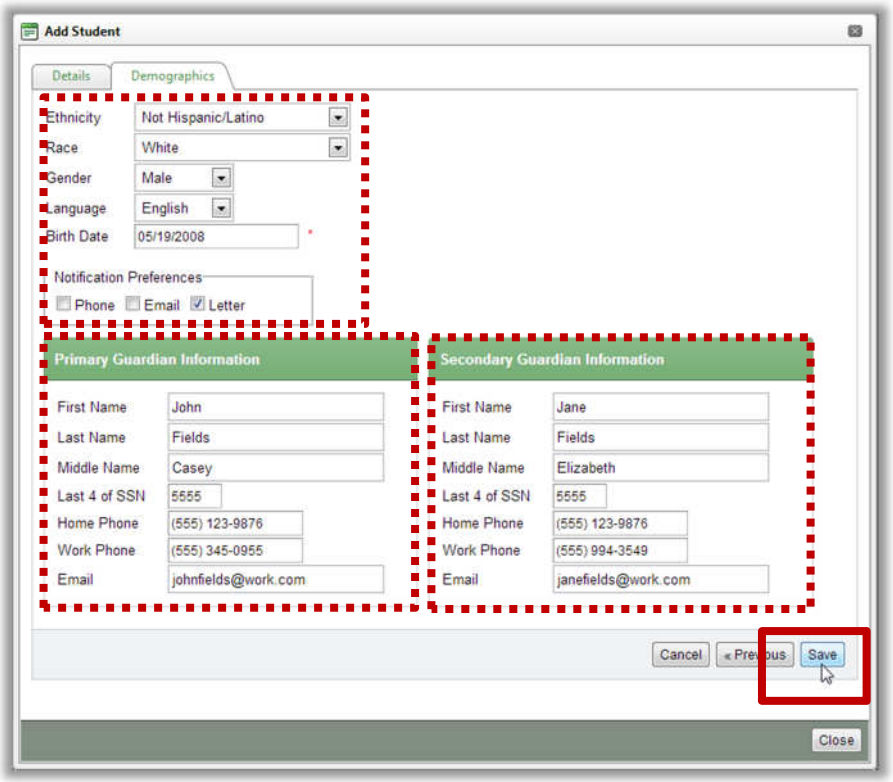
In the **Students** group

- Click **Add New Student** ( ).



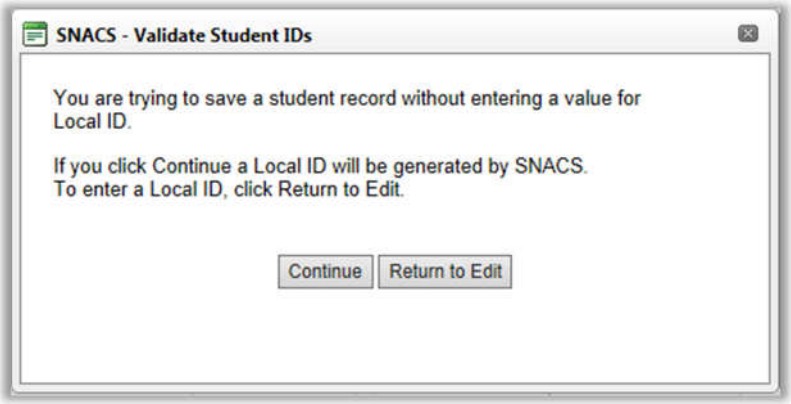
In the **Add Student** popup

- Enter student details.
- Select a **Site** and **Grade**.
- Enter or select an **Enrollment Date.**
- Enter a **Local ID**.
- Click Next » .



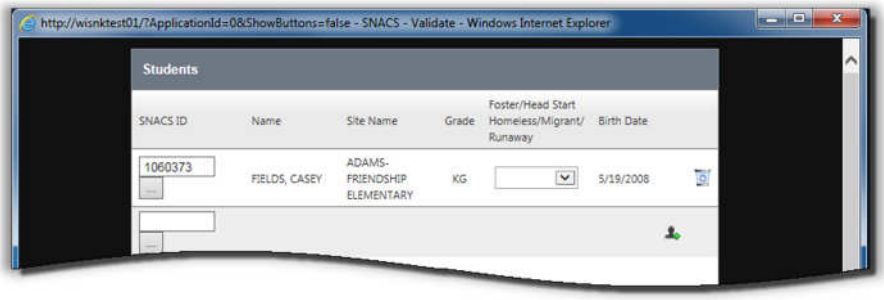
On the **Demographics** tab

- Select basic student demographics, enter a birthdate and select a Notification preference.
- Enter **Primary Guardian Information**.
- Enter **Secondary Guardian Information**.
- Click Save .



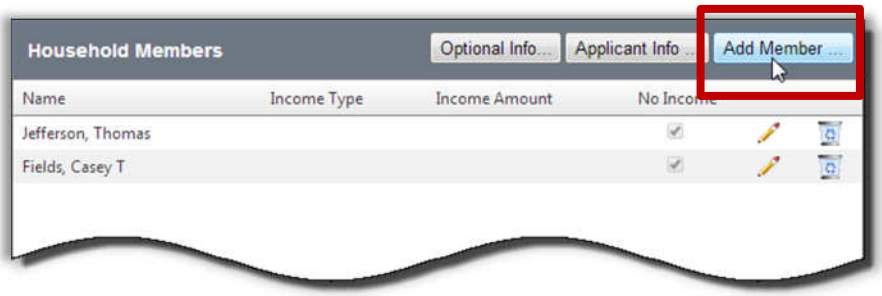
If a **Local ID** was not entered on the *Details* tab, in the **Validate Student IDs** popup

- Click Continue .



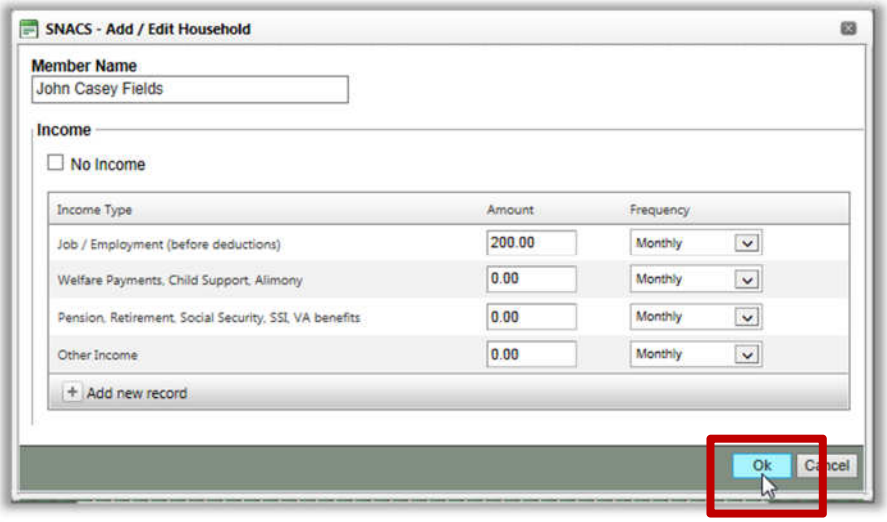
The student's information appears in the **Students** group.

Step 2: Household Members Group—Adding a Household Member



In the **Household Members** group

- Click **Add Member ...** .



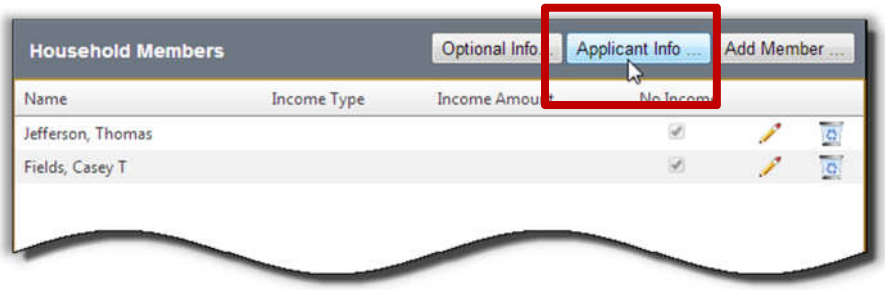
In the **Add / Edit Household** popup

- Enter the member's name in **Member Name**.
- In **Income,** either
  - Select **No Income**, or
  - Enter an **Amount** and select a **Frequency** in an Income Type listing; enter all income received by this member.
- Click **OK** .

Note

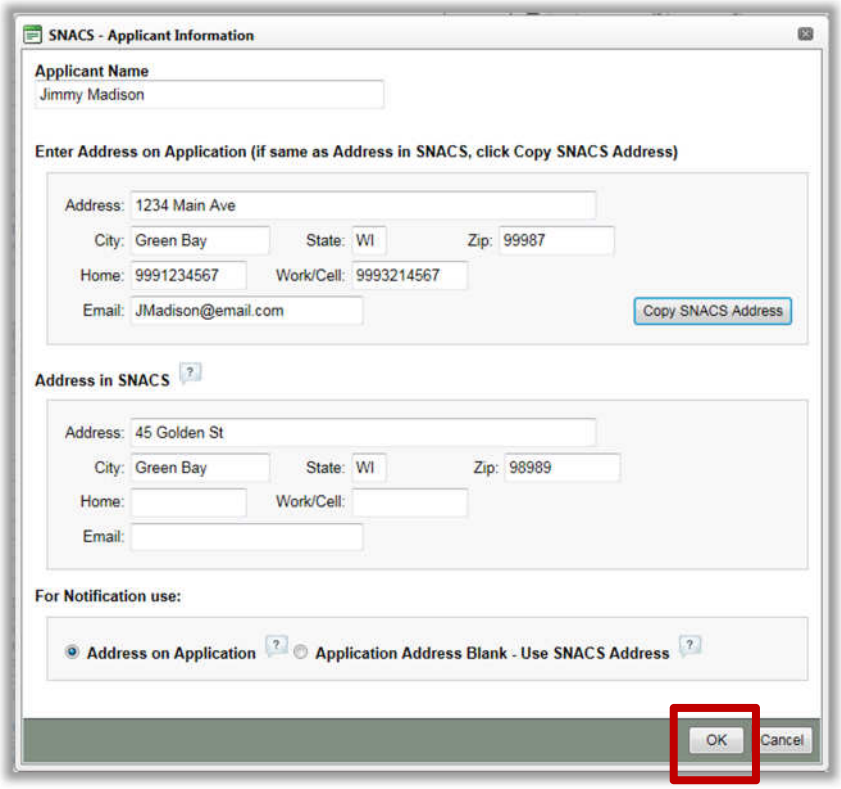
The limit for a single income entry is $9,999,999.99 or less.

Step 2: Household Members Group—Adding or Updating Applicant Information



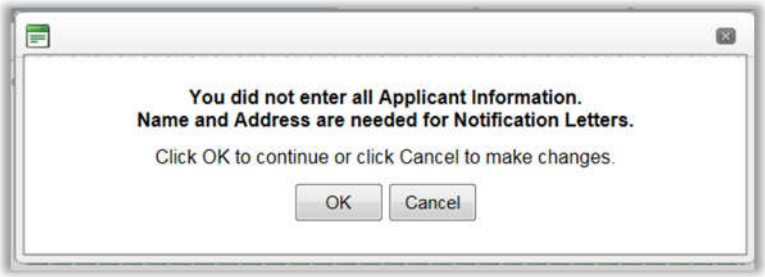
In the **Household Members** group

- Click Applicant Info ... .



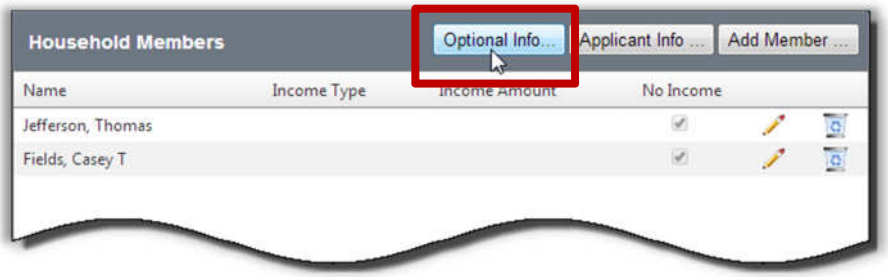
In the **Applicant Information** popup

- Enter or update **Applicant Name**, if needed.
- Update the Address on Application if needed. If no address is displayed and the address on the application is the same as the Address in SNACS, click Copy SNACS Address.
- Select a new address to use for notification, if needed
- Click OK .



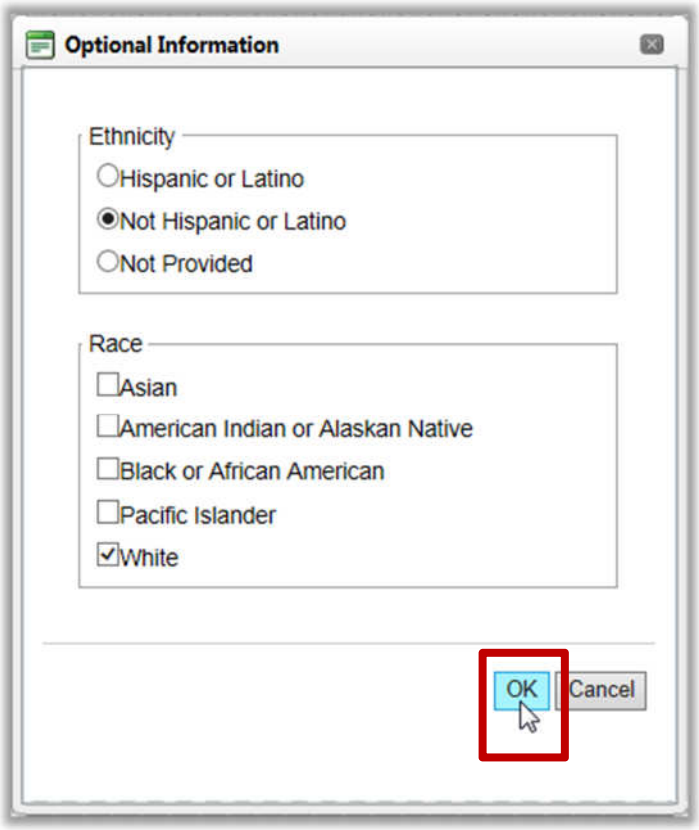
If applicant information is not entered, this message appears when Save is clicked in the Validation Workspace.

Step 2: Household Members—Adding or Updating Optional Information



In the **Household Members** group

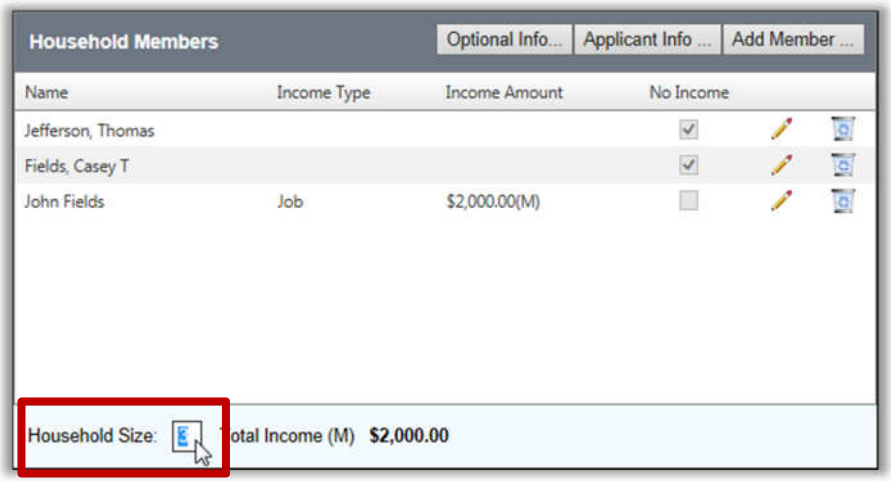
- Click Optional Info... .



In the **Optional Information** popup

- Select an **Ethnicity** or "Not Provided".
- Select one or more values for **Race**.
- Click OK .

Step 2: Household Members—Completing Household Members



The last step to completing the Household Members information is to indicate the total number of people listed in the **Household Members** group.

- Enter the total number of household members in **Household Size**.

Step 3: Applicant Authorization—Completing Authorization Details

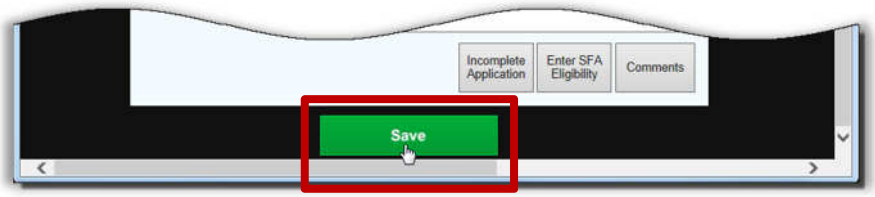
The last step in completing a manual entry application is to provide evidence that the paper application includes applicant authorization information.

To include applicant authorization information

- Enter the last four digits of the applicant's Social Security Number in **Applicant SSN** or select **No SSN** if the SSN was not provided.
- Select **Signature** if the application includes the applicant's signature, or leave clear if the application was not signed.
- Select a new signature date if needed; date must be within the current academic year.

When all required information is provided, **Valid** appears.

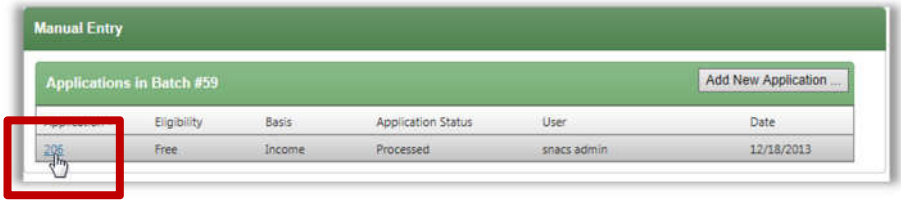
Step 4: Saving a Manual Application



At any time, the manual application can be saved. To save the application

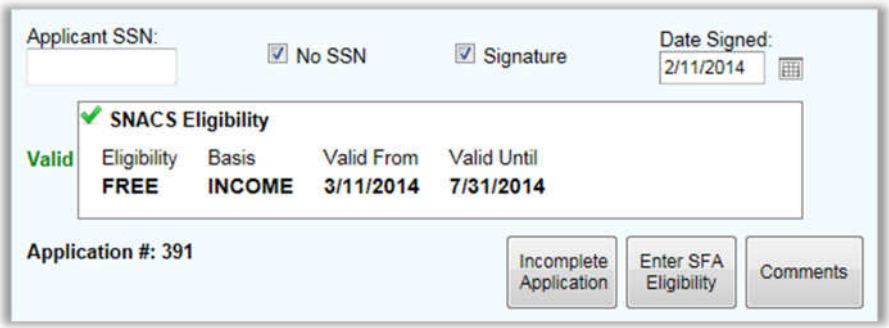
- Click

.



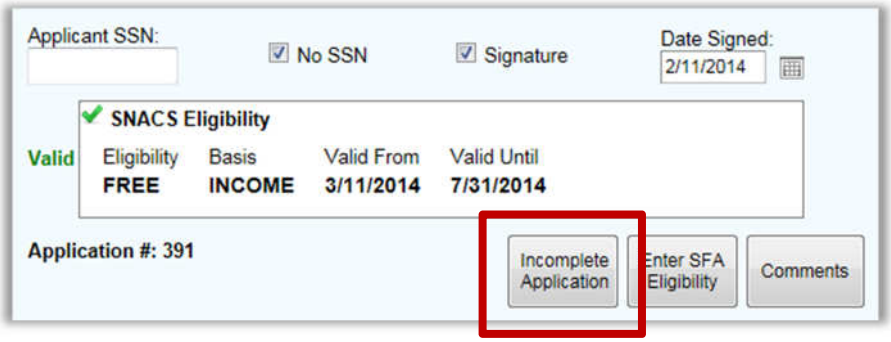
The application appears on the *Manual Entry* page in the **Applications in Batch #** list.

- Click the **Application #** link to view the application.

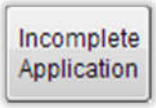


Several buttons appear in the Authorization group when the application has a status of "Valid".

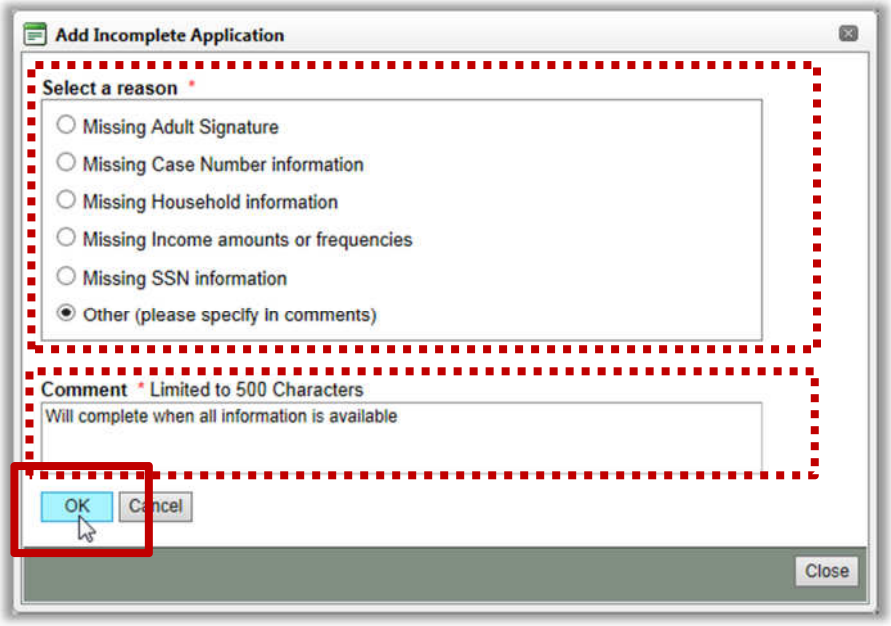
Incomplete Application



To indicate that the application has required information that is missing

- Click 

.



In the *Add Incomplete Application* popup

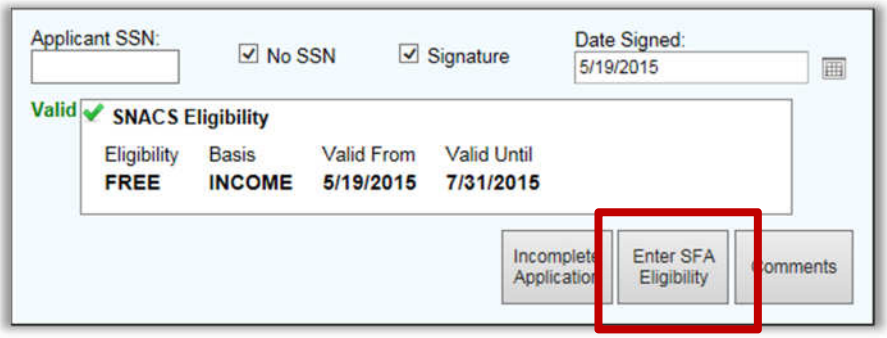
- Select one reason for the incomplete application (required).
- Enter a **Comment** (required).
- Click

.

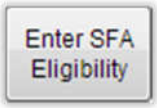
Note
This popup also appears when the

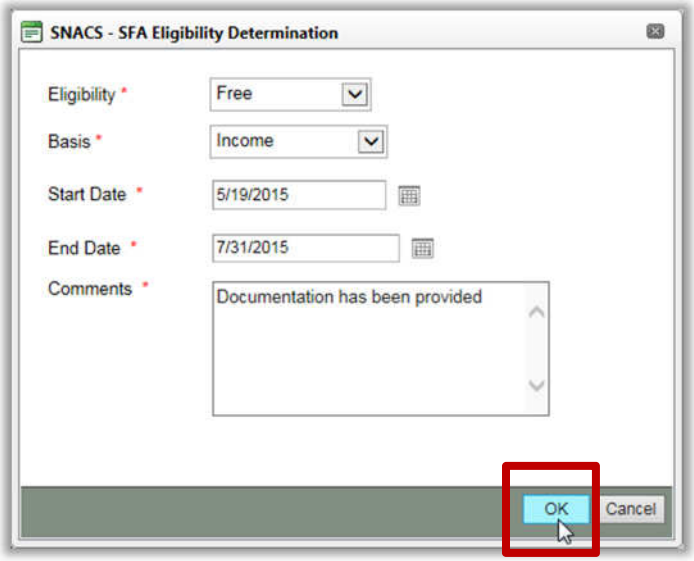
button is clicked and the application has a status of "**Correction Required**."

Enter SFA Eligibility



To manually select benefits eligibility

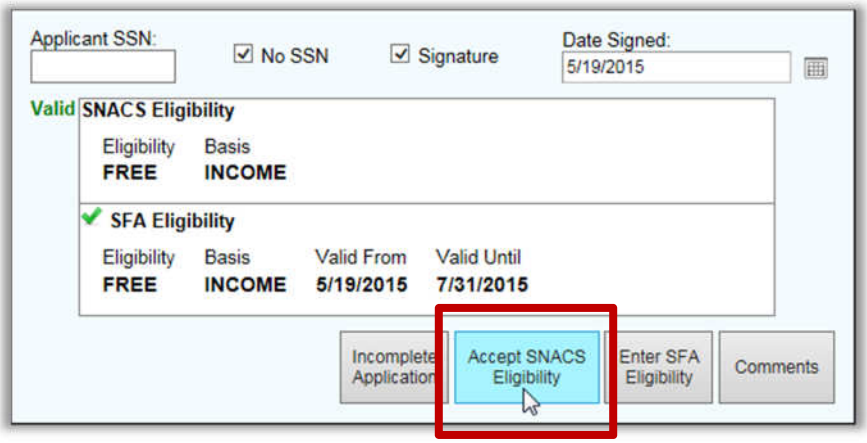
- Click 



In the **SFA Eligibility Determination** popup

- Make changes as needed.
- Enter text in **Comments**.
- Click

.



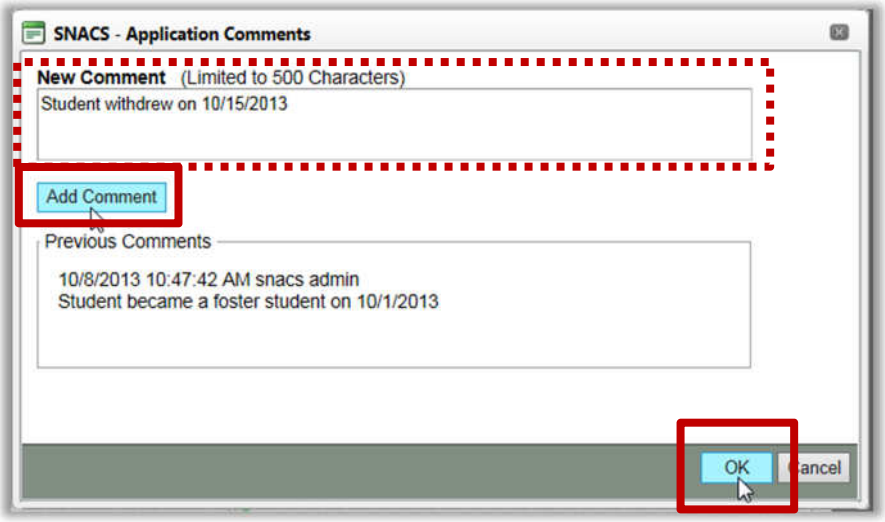
When SNACS Eligibility is different from SFA Eligibility, a new button appears that allows you to override the SFA Eligibility with the SNACS Eligibility.

Enter Comments

To add comments regarding the application

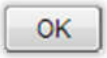
- Click

.



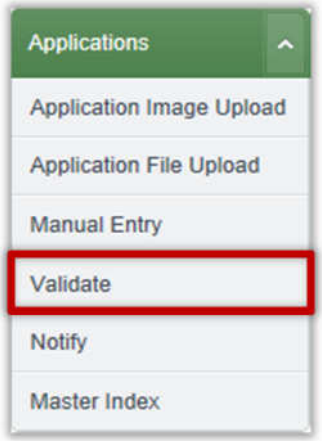
In the **Application Comments** popup

- Enter comment text in **New Comment**.
- Click

.
- Click 

.

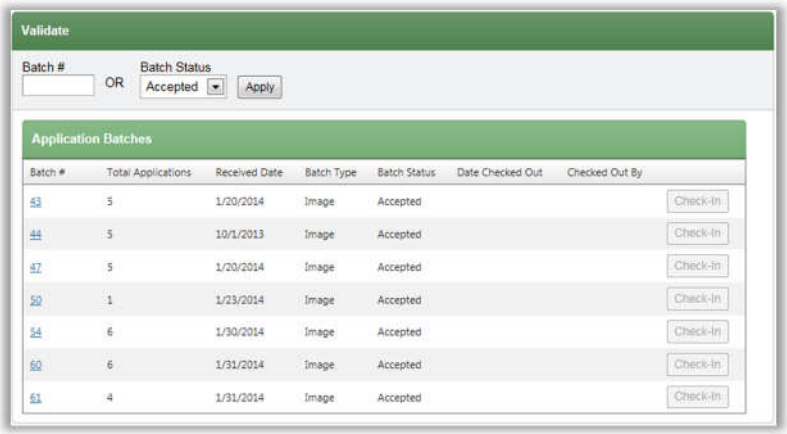
Validate



The **Validate** function determines if all required information is included in applications submitted via paper, online (Free and Reduced Meal Application website), or through file import. Errors are flagged for correction. When all errors are corrected, the application eligibility is determined.

Applications are validated in "batches" through display of each application in the Validation Workspace window. This window displays the application image as it would appear printed. Students are added or removed as needed. Household Members are added with income information, when appropriate.

Each application is checked for inclusion of the Applicant's Social Security number, signature, and signature date. Application processing status is always available with suggestions for required corrections provided.



By default on the *Validate* page

- **Batch #** is blank.
- **Batch Status** is set to "Accepted".
- All batches with a status of "Accepted" are listed in the **Application Batches** list.

Page Functions

Field/Button	Description
Apply	Click to display all batches that meet the selected search conditions.
Check-In	Click to check-in a batch that has previously been checked out.

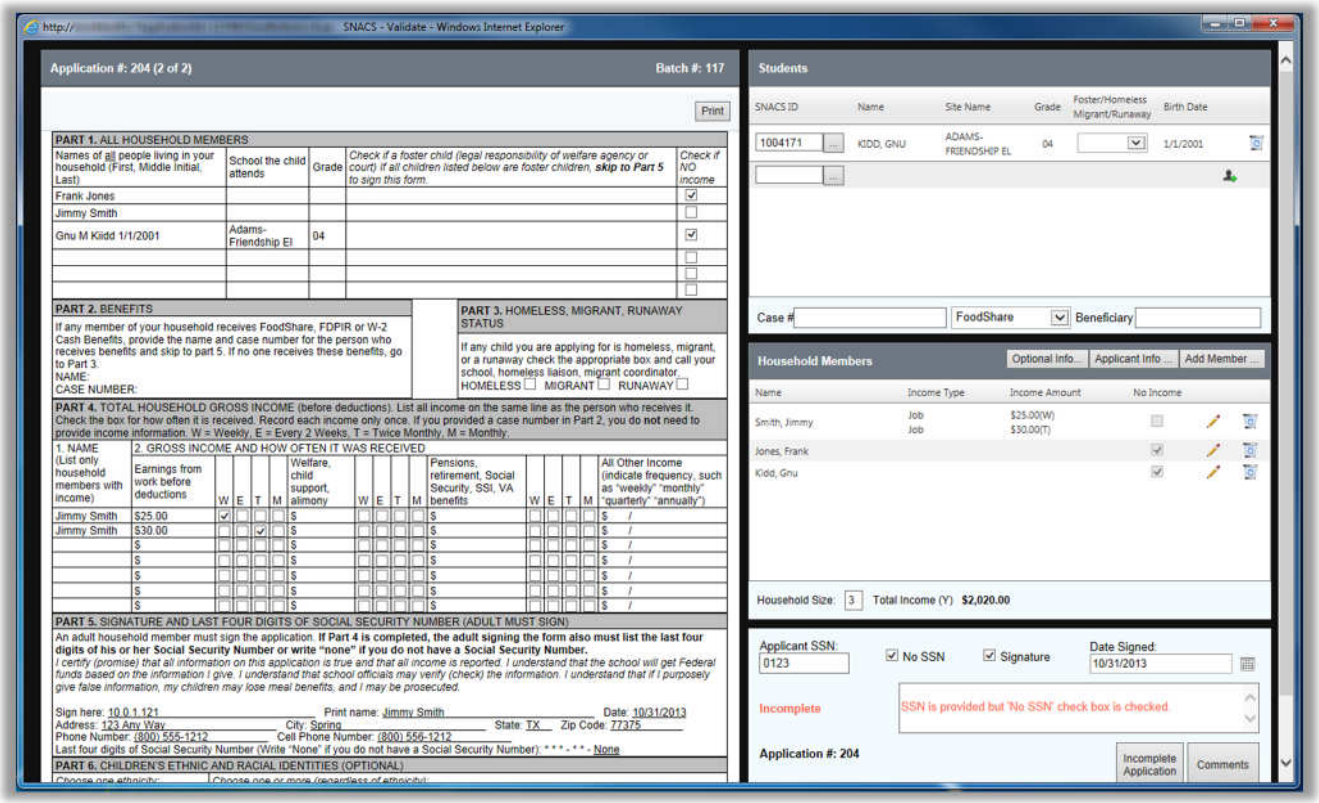
Table 2.6 Validate Page Functions

Validation Workspace

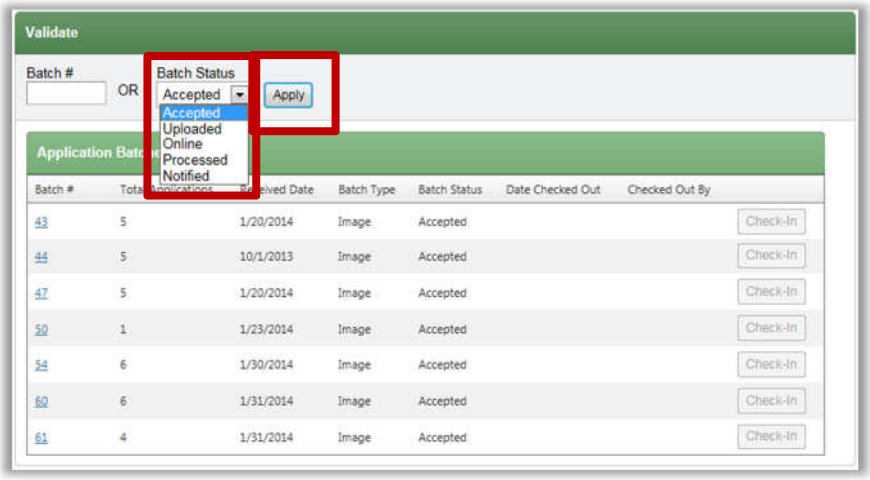
Validation takes place in the Validation Workspace window. This window automatically opens when you click on an **Application # link** in the **Application Summary** list on the *Batch Summary* page.

The Workspace is divided into two panes. The left-side pane is the digital image of the Free and Reduced-Price Meal application. The right-side page includes four areas:

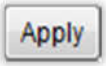
- **Students** – lists all students included on the application.
- **Household Members** – lists all individuals living in the student's household and the income, if any, received by each member.
- Authorization Information – this area provides
  - Last four digits of the applicant's Social Security Number and indicates if the paper application was signed; only a date within the current academic year can be entered / selected in **Date Signed**.
  - Current status of application (Correction required; VALID; Incomplete).
  - Application number.
  - Buttons to access related functions.
- Process buttons – saves the application, and returns to the previous application or continues to the next application.



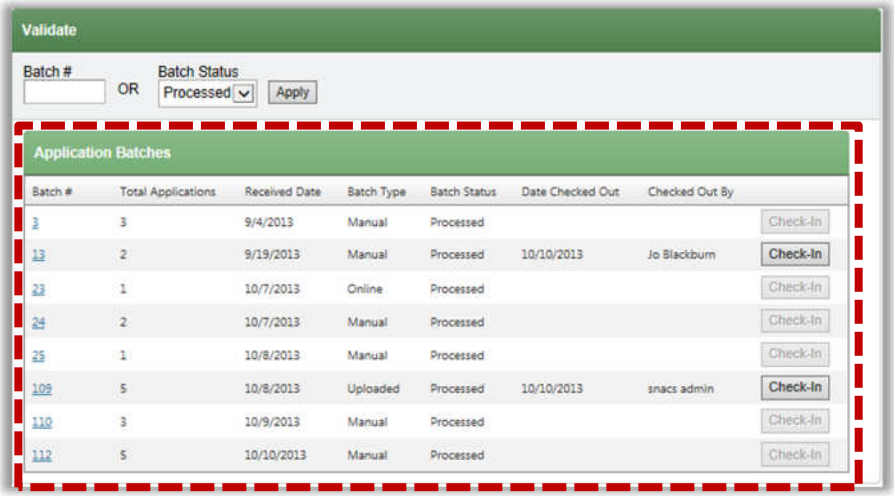
Searching for an Application Batch



On the *Validate* page

- Enter a **Batch #** or select a **Batch Status**.
- Click 

.



All applications that meet the search conditions are shown in the **Application Batches** list.

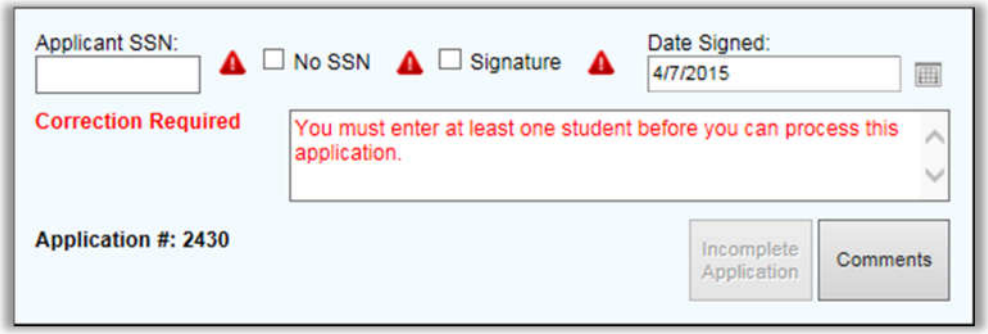
Validating an Application

Validating an application is the process of verifying that information on an application was read and stored correctly. The application and recorded information is displayed in the Validation Workspace. The application appears on the left side of the Workspace, and recorded information is shown on the right side.

Step 1: Verify Students

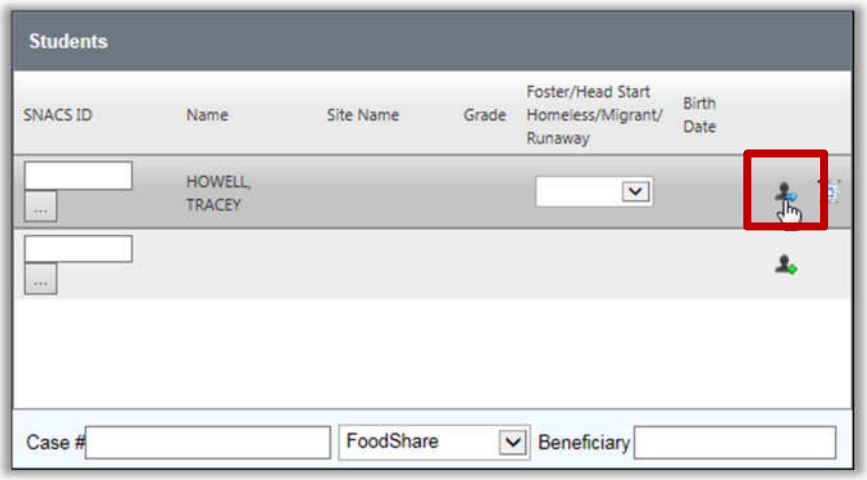
Household members are shown on the application in **PART 1. ALL HOUSEHOLD MEMBERS**. In the **Students** group, verify that all listed students appear on the application and that the names are spelled correctly; add any additional student names that appear on the application to the **Students** list. If a student record in SNACS could automatically be matched to the information provided, the SNACS ID of the identified student will be displayed in the SNACS ID box. If no single exact match was found, search for students or add the listed student to SNACS.

Note: To process an application, it must include at least one student. Otherwise, a message appears when **Save** is clicked in the Validation Workspace and limited incomplete options are available.



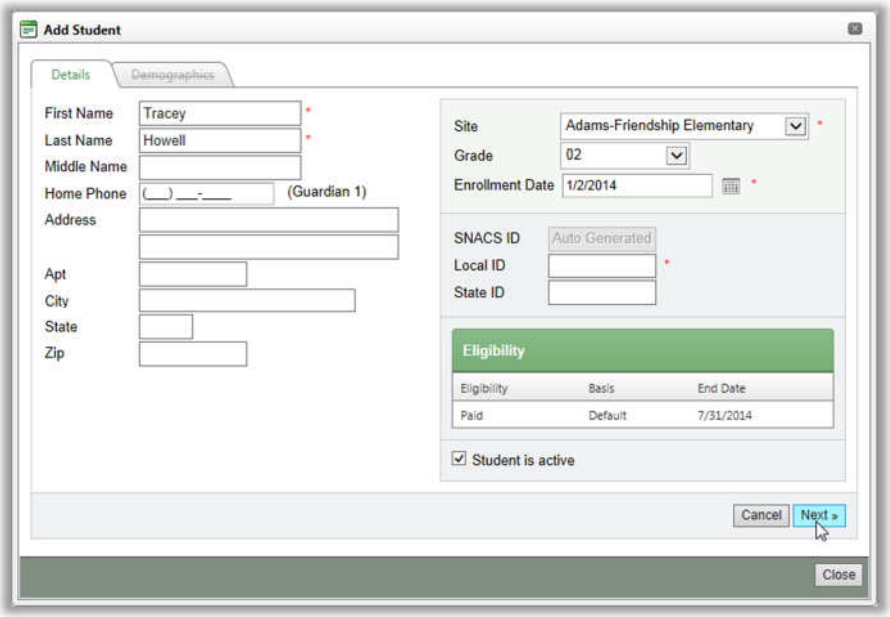
Add a Student Not in SNACS

The **Add New Student** icon ( ) appears in a student listing when the student is not in the SNACS database.



In the student listing

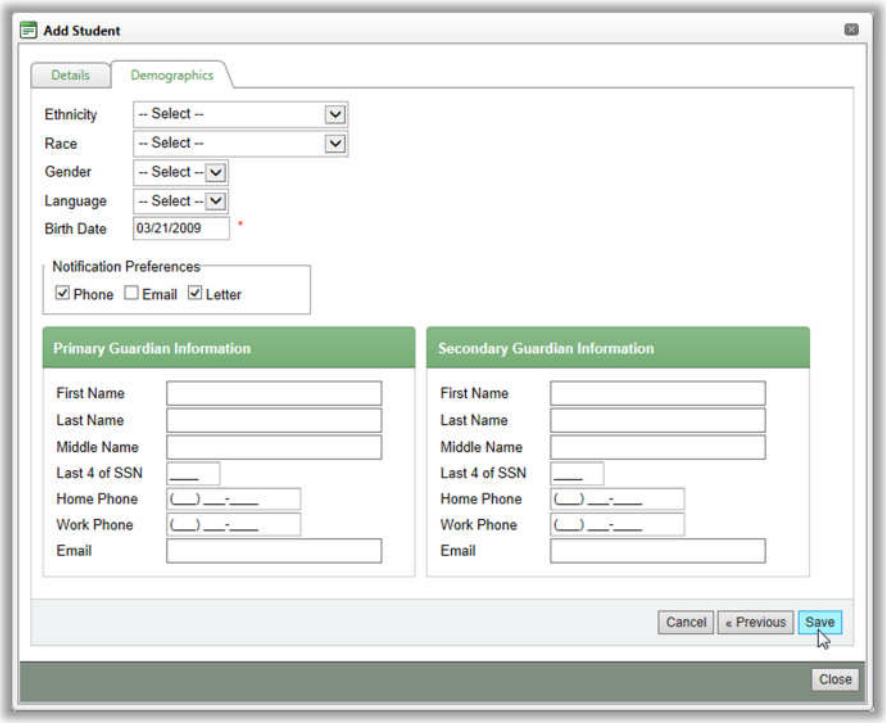
- Click **Add New Student** ( ).



Available information populates fields in the **Add Student** popup.

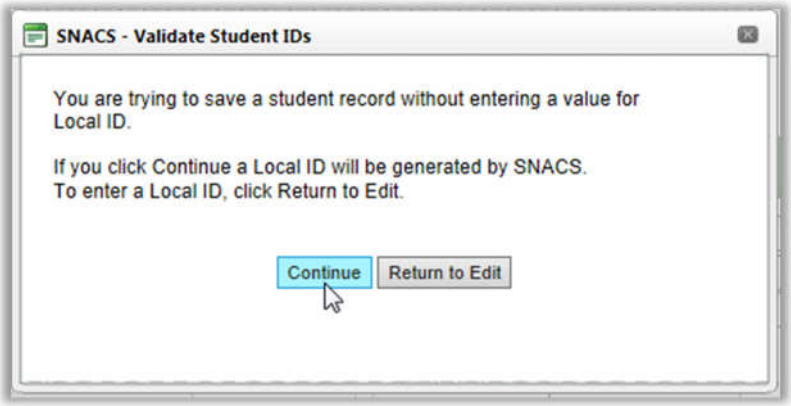
In the **Add Student** popup on the **Details** tab

- Select the student's **Enrollment Date**.
- Enter the student's Local ID, if known.
- Add any other information, if availalble.
- Click Next » .



On the **Demographics** tab

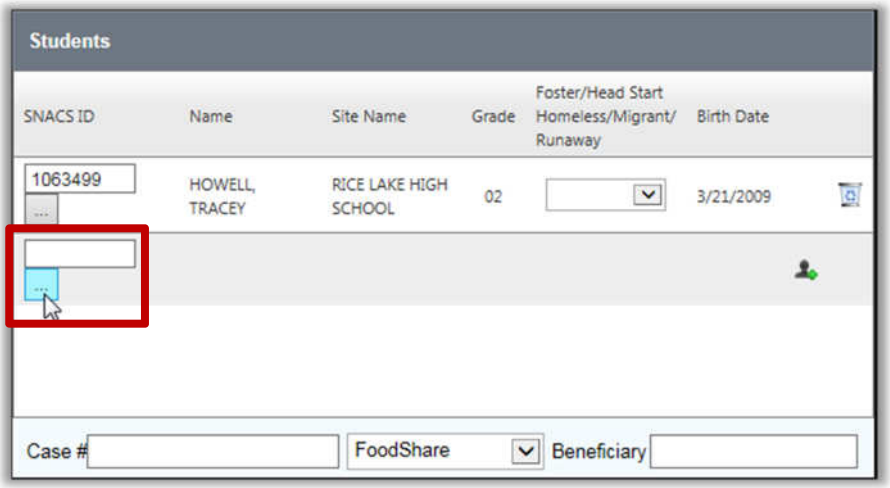
- Enter or select demographic student data, if available.
- Verify or enter **Birth Date**.
- Enter **Notification Preferences**, if available.
- Enter **Guardian Information**, if available.
- Click Save .



The **Validate Student IDs** popup appears if you did not enter a Local ID.

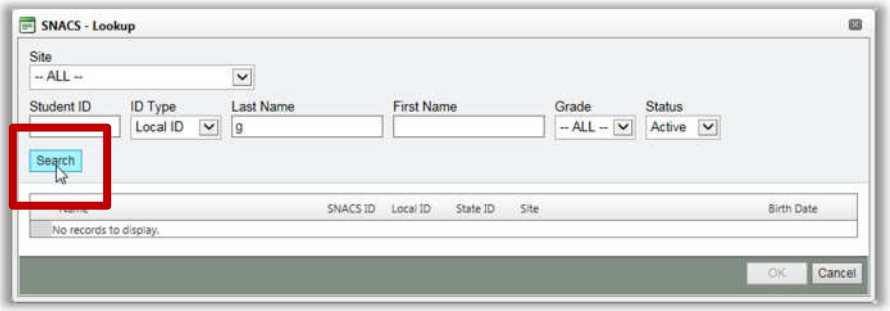
- Click Continue .

Add a Student Already in SNACS



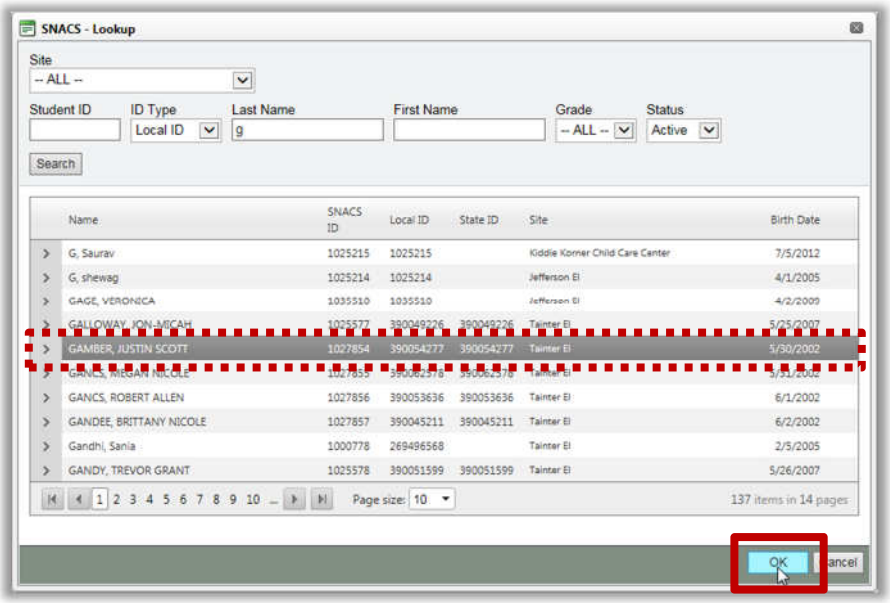
In the **Students** group

- Click **Lookup** (...).



In the **Lookup** popup

- Select one or more search conditions.
- Click Search .

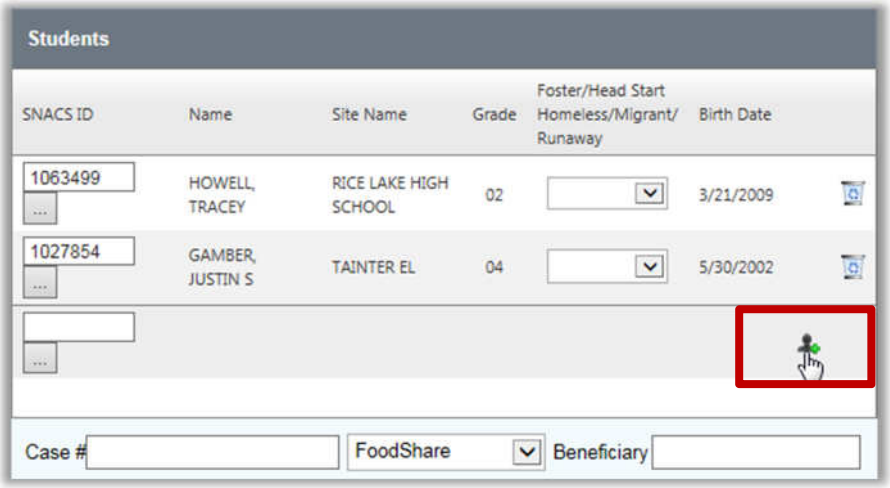


In the list of students that match the search conditions

- Select a student listing.
- Click OK .

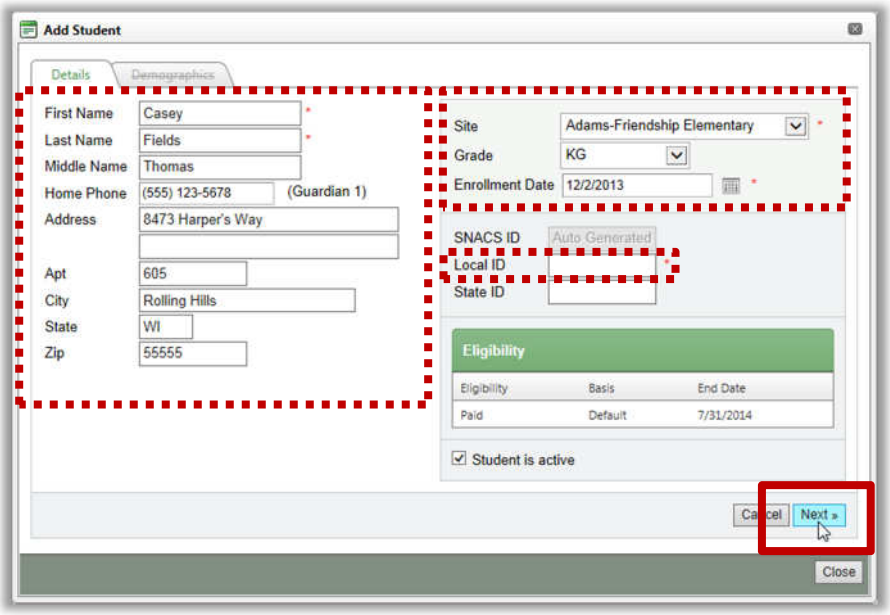
The student's information appears in the **Students** group.

Add a Student Not in SNACS and Not Listed



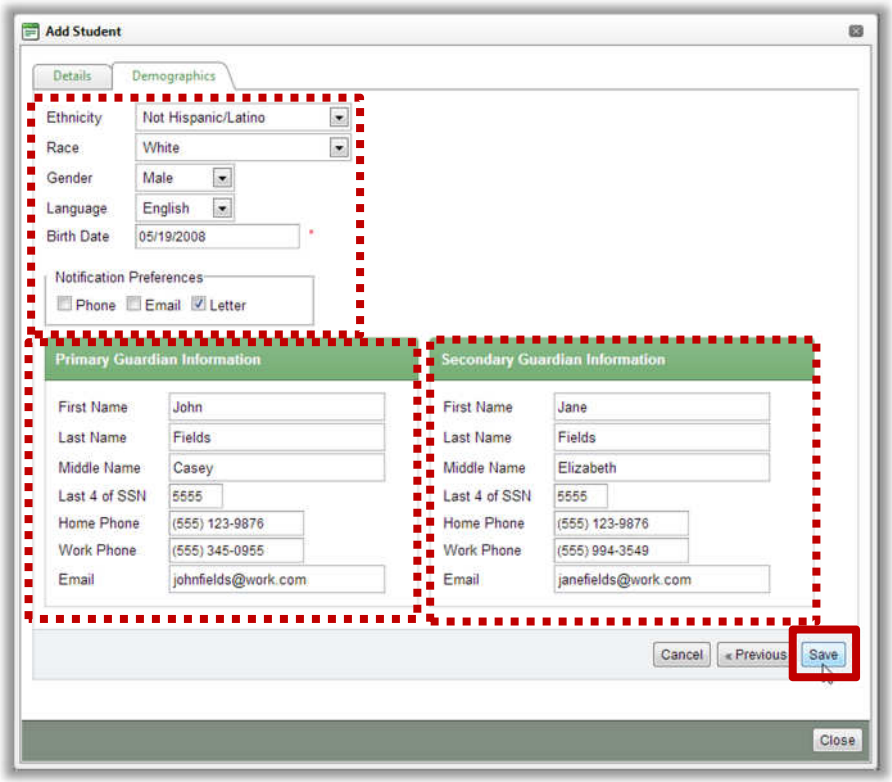
In the **Students** group

- Click **Add New Student** ( ).



In the **Add Student** popup

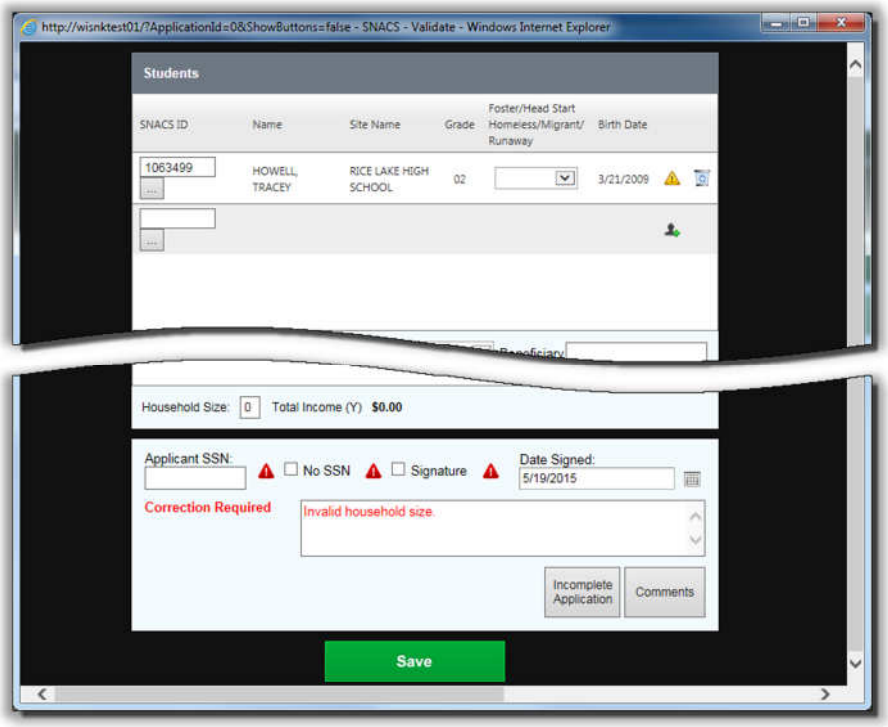
- Enter student details.
- Select a **Site** and **Grade**, and enter or select an **Enrollment Date**.
- Enter a **Local ID,** if available.
- Click Next » .



On the **Demographics** tab

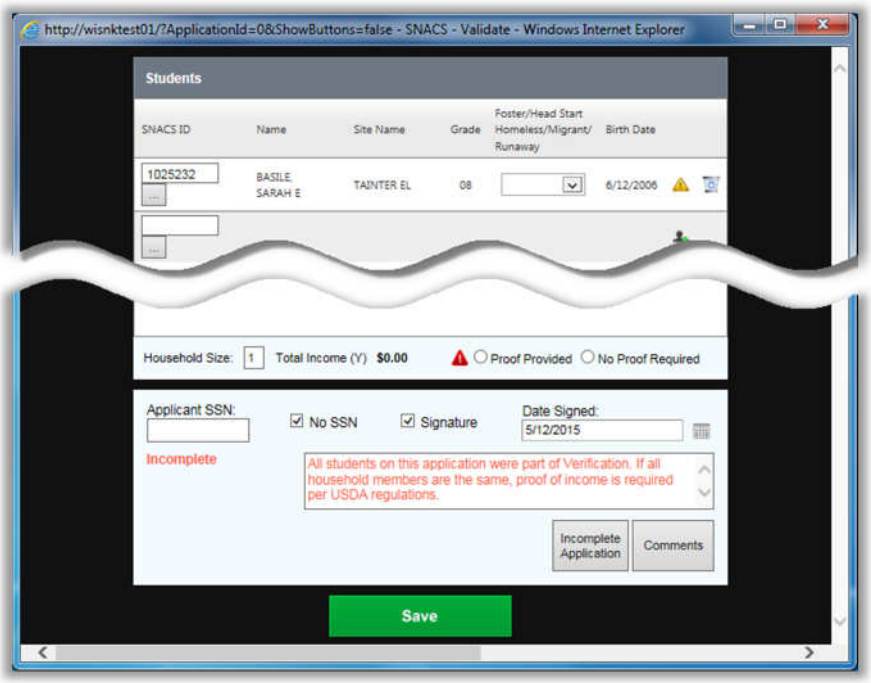
- Select basic student demographics, enter a birthdate and select a Notification preference.
- Enter **Primary Guardian Information**.
- Enter **Secondary Guardian Information**.
- Click Save .

Adding a Student Who is Already on an Application



If a student is added to an application who has already been included on a processed application, a caution icon appears. Hovering over the icon displays a message that provides the application number, eligibility status and the benefits starting date.

Adding a Student Who is Already on an Application Added for Verification



If a student is added to an application who has already been included on a processed application that has completed Verification, the

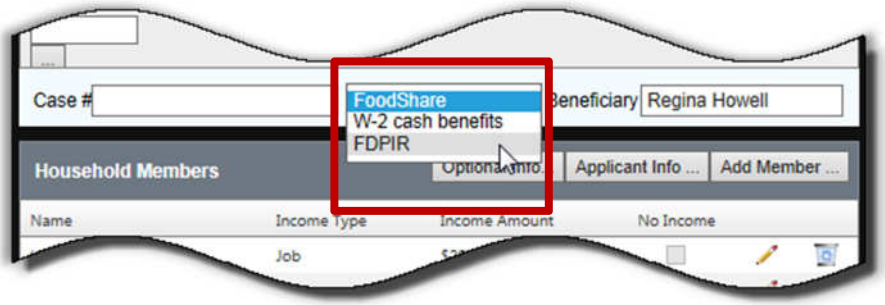
" Proof Provided No Proof Required "

field appears. A message appears in the details group that proof of income is required.

If you select "No Proof Required", the **Comments Required** popup appears and must be completed before continuing.

Verify Receipt of Benefit Information

Benefit information is shown on the application in **PART 2. BENEFITS**. Verify the case number. Special status information is shown on the application in **PART 3. HOMELESS, MIGRANT, RUNAWAY STATUS**



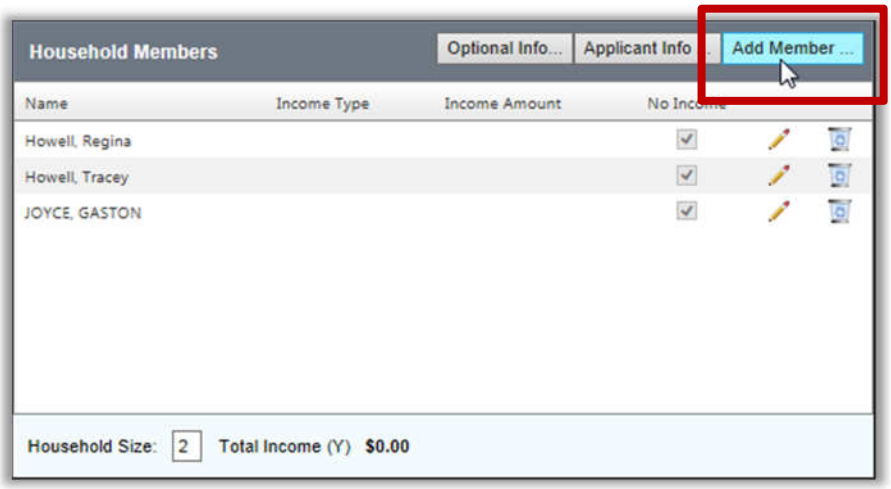
In the **Household Members** group

- Verify **Case #** and benefit type.
- Enter the **Beneficiary** name.

Step 2: Verify Household Members

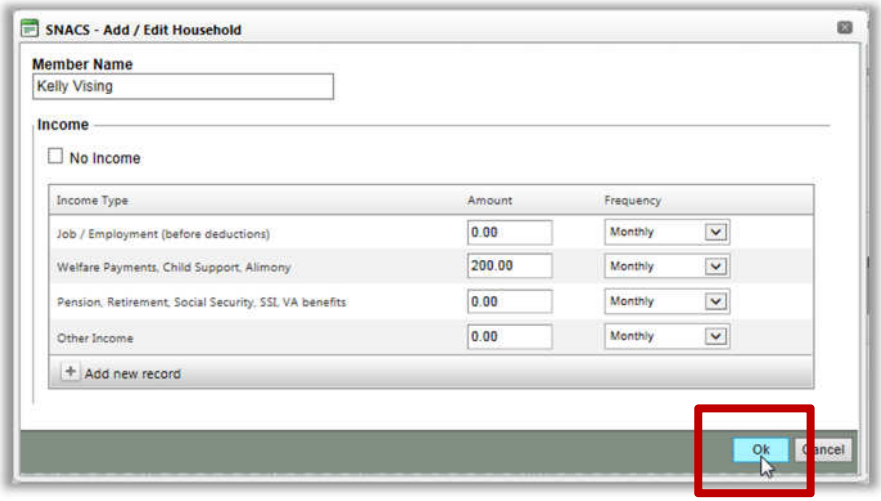
Household members and their received income are shown on the application in **PART 4. TOTAL HOUSEHOLD GROSS INCOME**. Verify that all listed household members, their income, and income frequency appear in the **Household Members** list.

Adding a Household Member



In the Household Members group

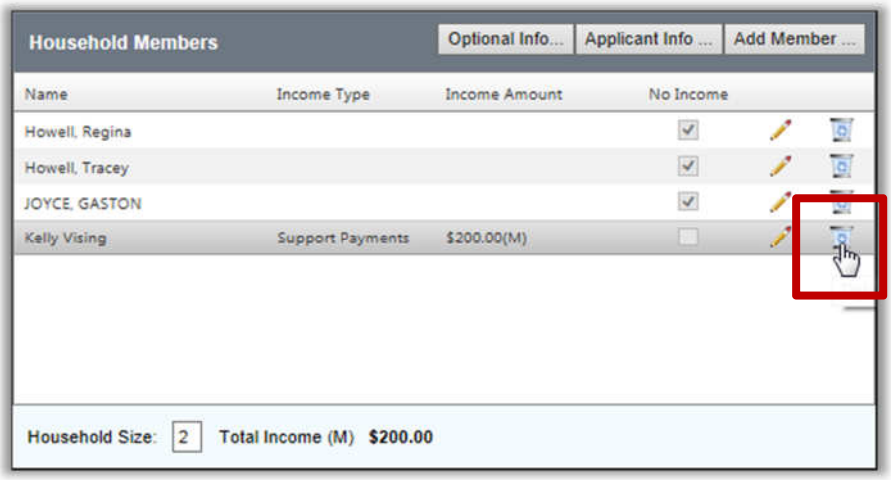
- Click Add Member ... .



In the **Add / Edit Household** popup

- Enter the **Member Name**.
- Select **No Income**, or enter an **Amount** and select a **Frequency** in an Income Type listing; enter all income received by this member.
- Click OK .

Removing a Household Member

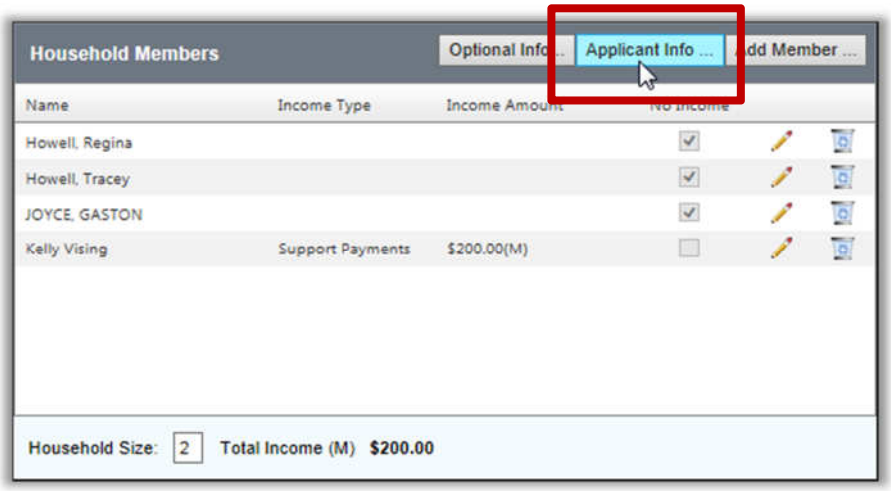


In the **Household Members** group

- Click **Delete** ( ) in a member listing.

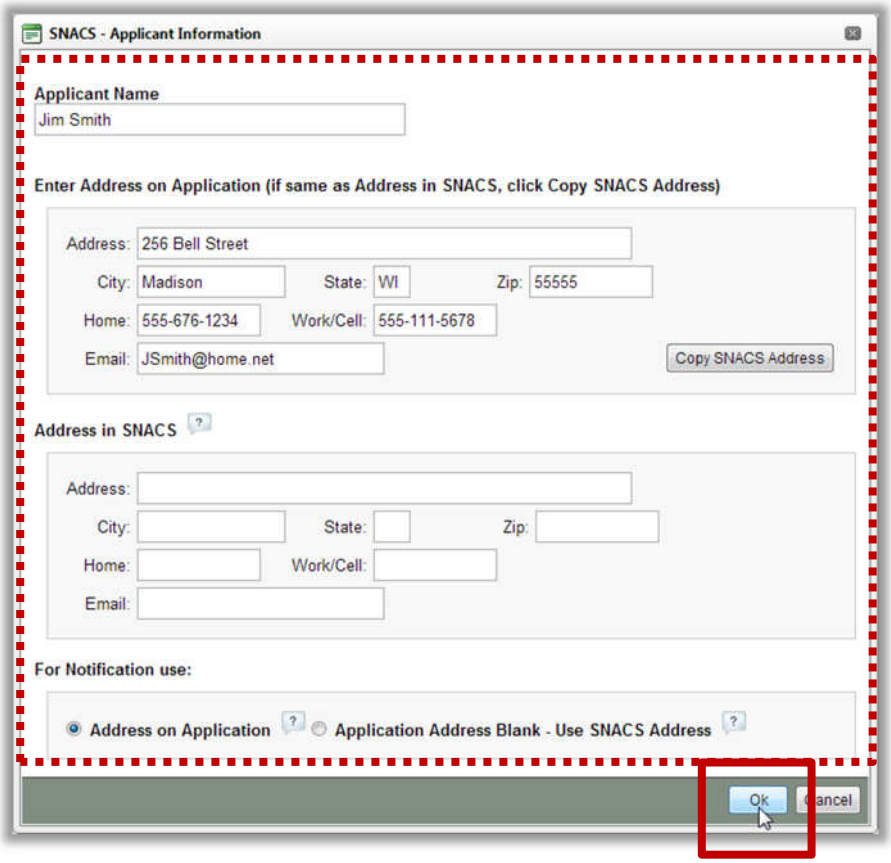
The member is removed. No confirmation is required.

Adding or Updating Applicant Information



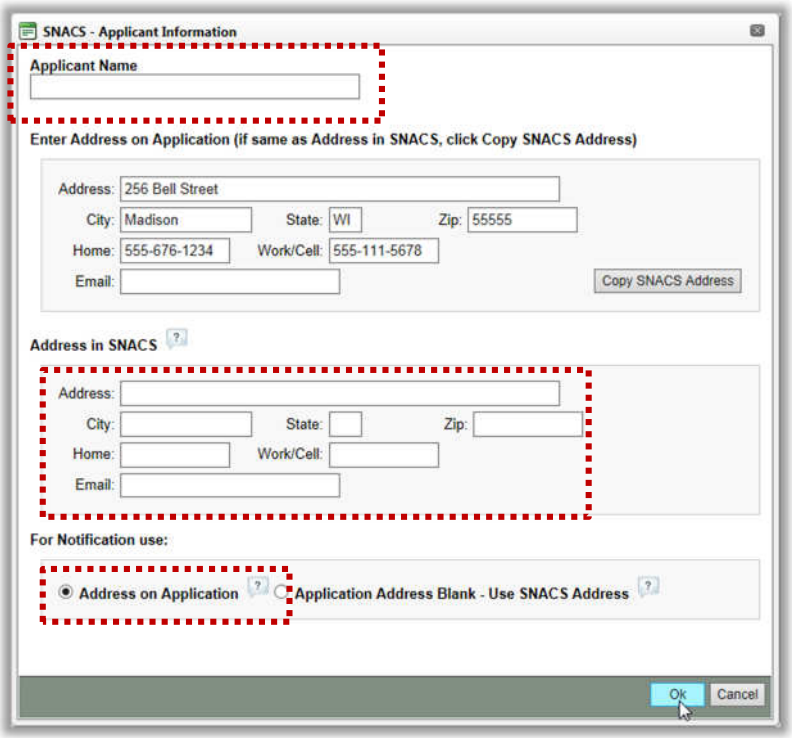
In the **Household Members** group

- Click Applicant Info ... .



In the **Applicant Information** popup

- Enter or update **Applicant Name**, if needed.
- Update the address, if needed.
- Select a new address **For Notification use**, if needed.
- Click OK .



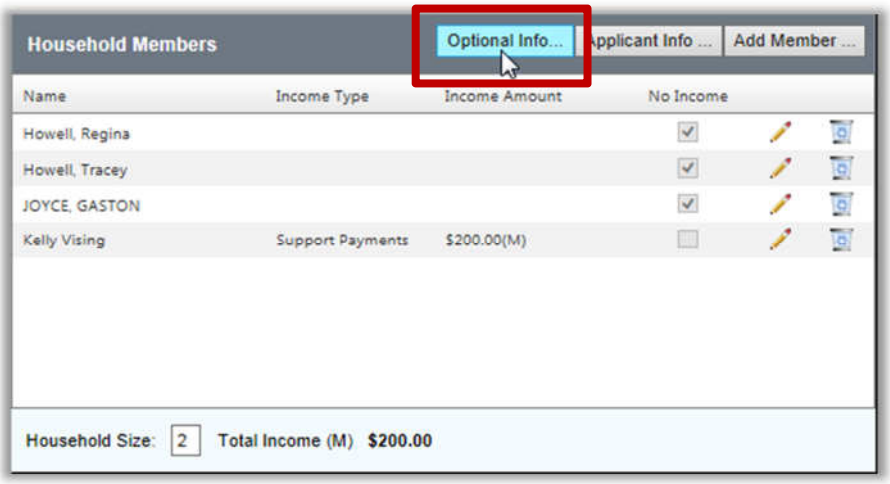
Note: If the

- **Applicant Name** is left blank, or
- **Applicant Name** is entered and **Address on Application** is selected but no address is provided

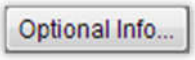
an error message appears when **Save** is clicked in the Workspace window.

The **Applicant Name** and complete **Address on Application** details must be provided to ensure that the notification can be sent.

Adding or Updating Optional Information



In the **Household Members** group

- Click 

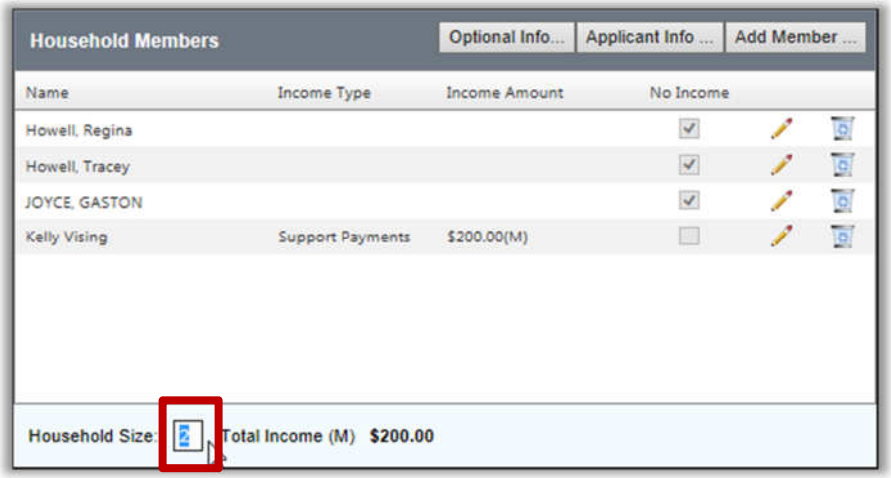
.

In the **Optional Information** popup

- Select an **Ethnicity** or "Not Provided".
- Select a value or multiple values for **Race**.
- Click OK .

Completing Household Members

The last step in completing the Household Members information is to verify the total number of people listed in **Household Members**.

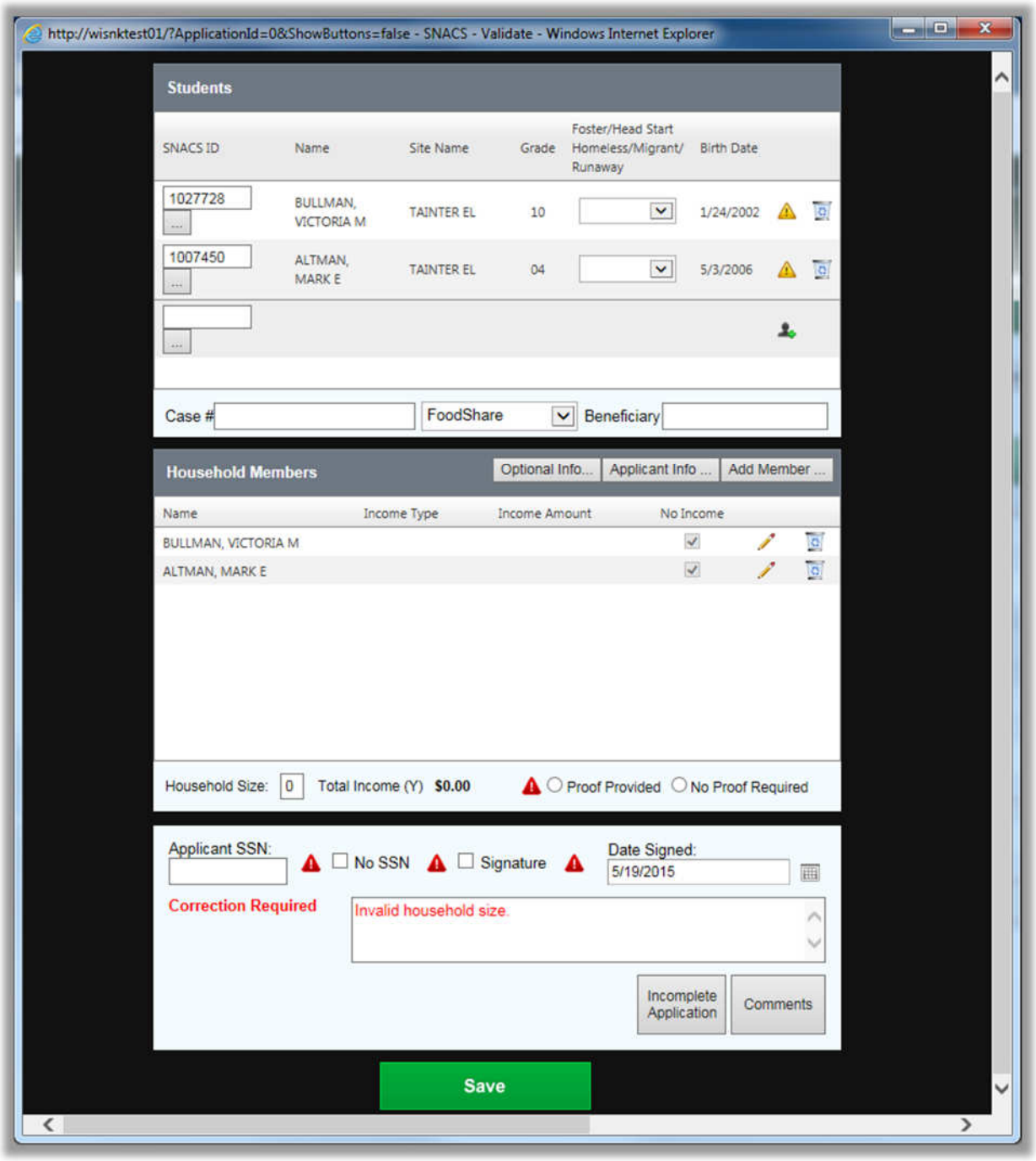


- Update the **Household Size**, if needed.

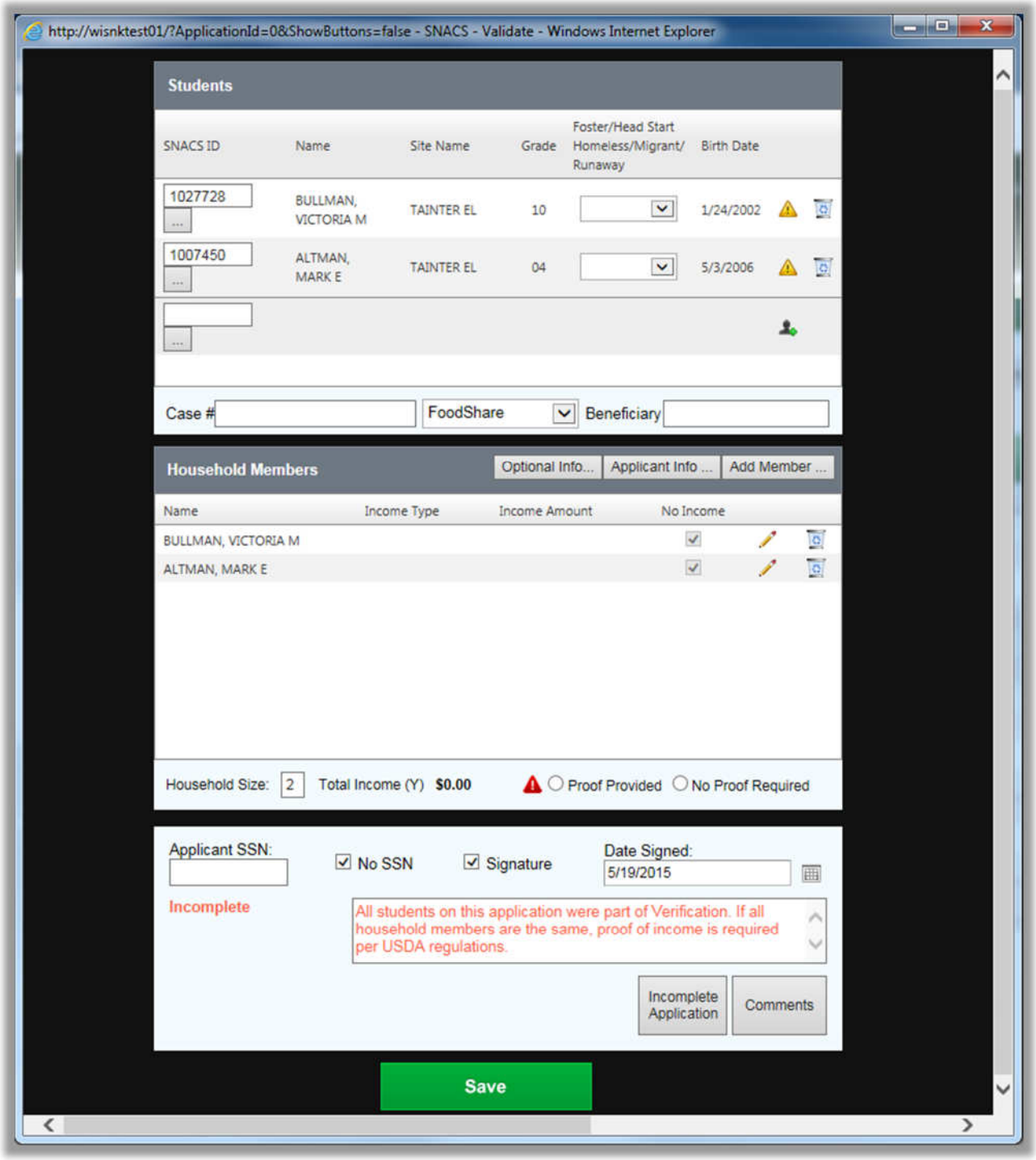
Providing Proof

If all students on an application are on another application that was/is in Verification for the current Academic Year

- A yellow warning icon appears in each student listing in the Students group, and
- Two options appear in the Household Members group, "Proof Provided", "No Proof Required".

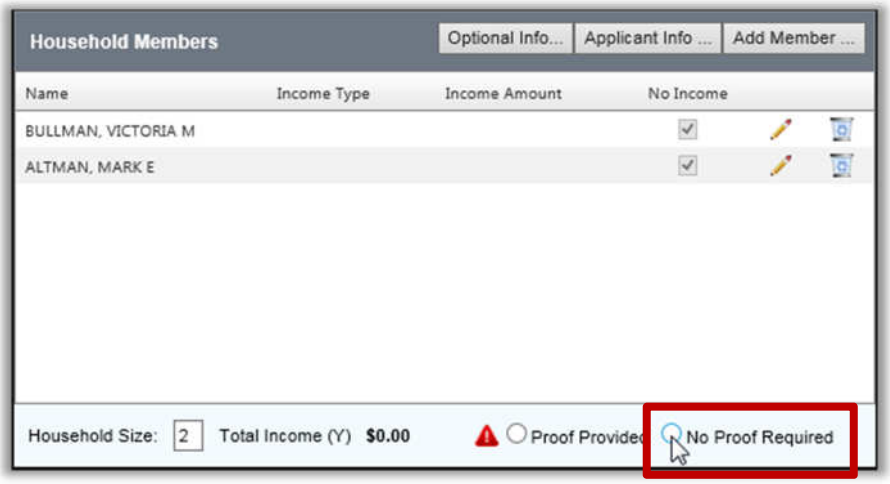


When all "Correction Required" errors are corrected the status "Incomplete" appears in the Applicant Authorization Details group with the message, "All of the students on this application were part of Verification. If all household members are the same proof of income is required per USDA regulations."



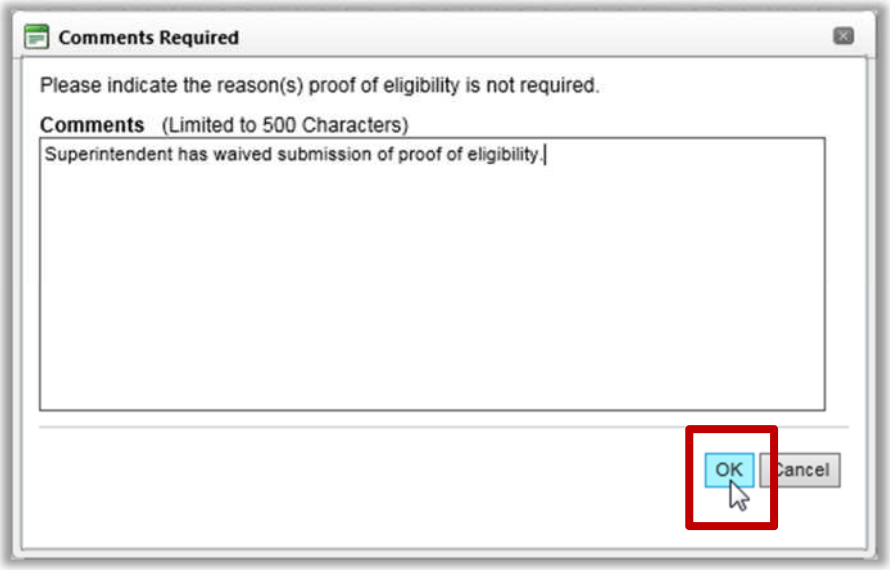
You must choose one option to complete processing for the application. Hovering over ***either*** option displays the message "Household must submit Proof of Eligibility. Upload documentation from the View Application page."

If you choose "Proof Provided", the application can be saved and the validation process continued to the next application. If you choose "No Proof Required", one more step is required.



In the **Applicant Authorization Details** group popup

- Click "No Proof Required."

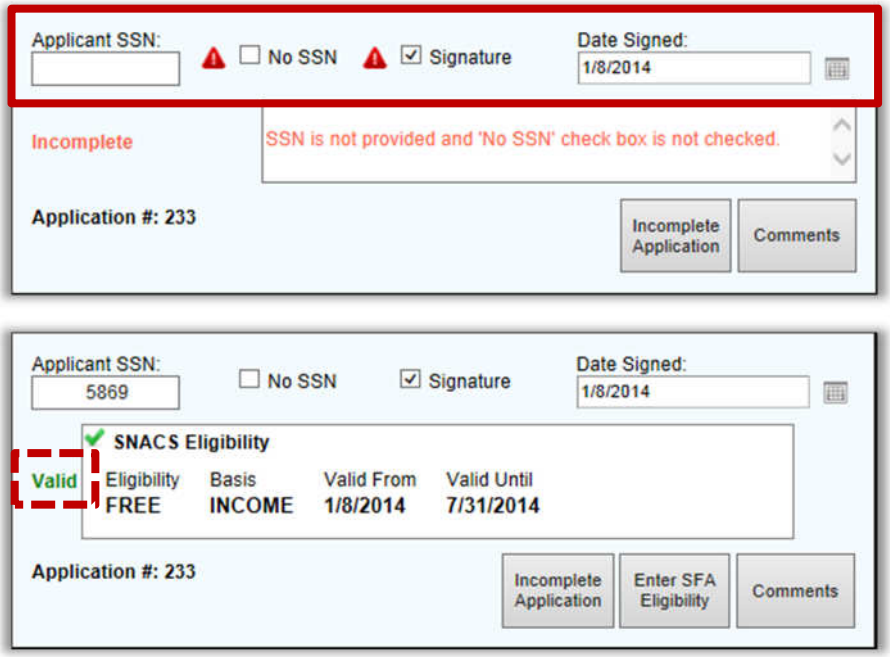


In the **Comments Required** popup

1. Enter comment text
2. Click OK .

Step 3: Verify Applicant Authorization Details

The last step is to verify the authorization information shown in the application in **PART 5. SIGNATURE AND LAST FOUR DIGITS OF SOCIAL SECURITY NUMBER**.



- Verify the last four digits of the applicant's Social Security Number in **Applicant SSN** or select **No SSN** if the SSN was not provided.
- Verify that the applicant signed the application and clear or select **Signature** as needed.
- Change the **Date Signed** date, if needed.

When all required information is provided, **Valid** appears for the application status.

Validation Workspace Buttons

Field/Button	Description
Incomplete Application	Click to display the Add Incomplete Application popup; use the Add Incomplete Application popup to choose a reason and enter comment text to describe why processing the application cannot be completed as is. The application will receive Paid eligibility with a Basis of Incomplete.
Accept SNACS Eligibility	Click to accept the eligibility assigned through SNACS; button appears when SFA eligibility has been entered.
Enter SFA Eligibility	Click to display the SFA Eligibility Determination popup; use the SFA Eligibility Determination popup to change **Eligibility** type, **Reason**, **Start Date** or to add **Comments** regarding the application eligibility.
Comments	Click to display the **Application Comments** popup; use the **Application Comments** popup to "attach" comment text to the application.

Table 2.7 Validation Workspace Buttons

Step 4: Saving an Application

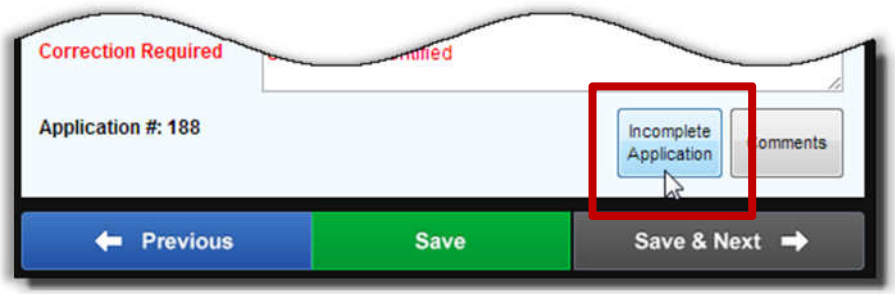
When you have completed validating the application, or have validated as much as possible, you will save the application. The available buttons at the bottom of the right-side of the Validation Workspace, may vary.

Validation Workspace Functions

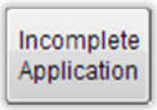
Button	Description
Previous	Click to display the previous application in the batch; button is grayed when there are no other previous applications in the batch.
Save	Click to save updates and leave the application on display.
Save & Next	Click to save updates and display the next application in the batch; button is grayed when no applications remain in the batch.

Table 2.8 Validation Workspace Functions

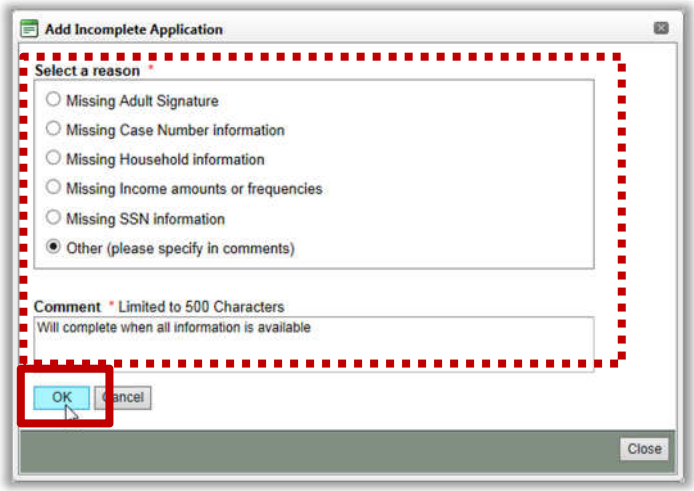
Recording an Incomplete Reason



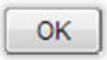
If the application needs corrections or additional information, you must record the reason for the incomplete application.

- Click 

.



In the **Add Incomplete Application** popup

- Select one reason for the incomplete application.
- Enter a **Comment**.
- Click 

.

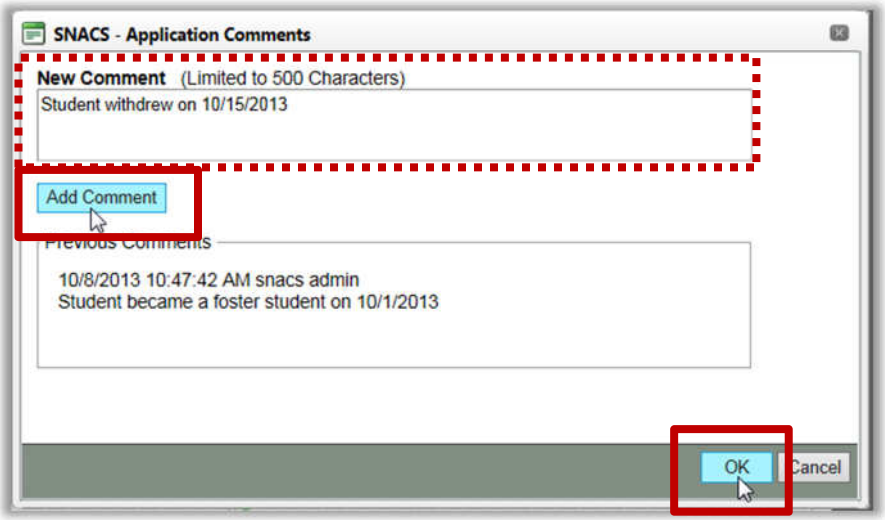
✪ **Note**:
Missing Adult Signature has an impact on eligilbility, so it should be selected if it is one of multiple reasons that the application is incomplete.

Enter Comments

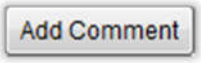
To add comments regarding the application

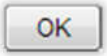
- Click

.



In the **Application Comments** popup

- Enter comment text in **New Comment**.
- Click 

.
- Click 

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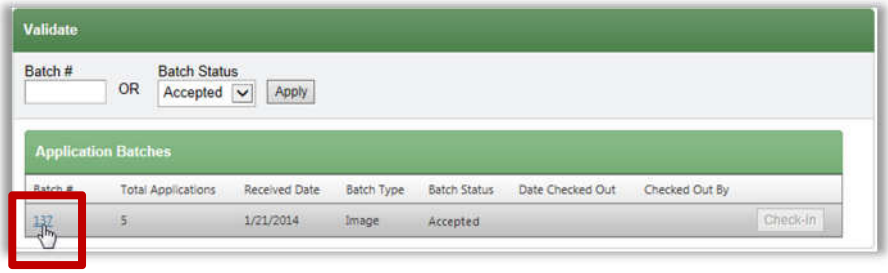
Validating an Application Batch

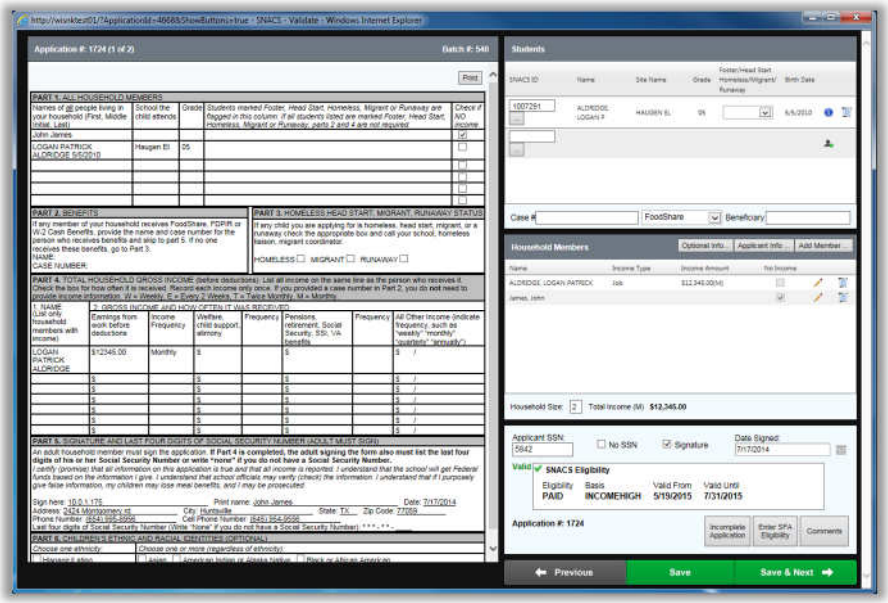


On the *Validate* page

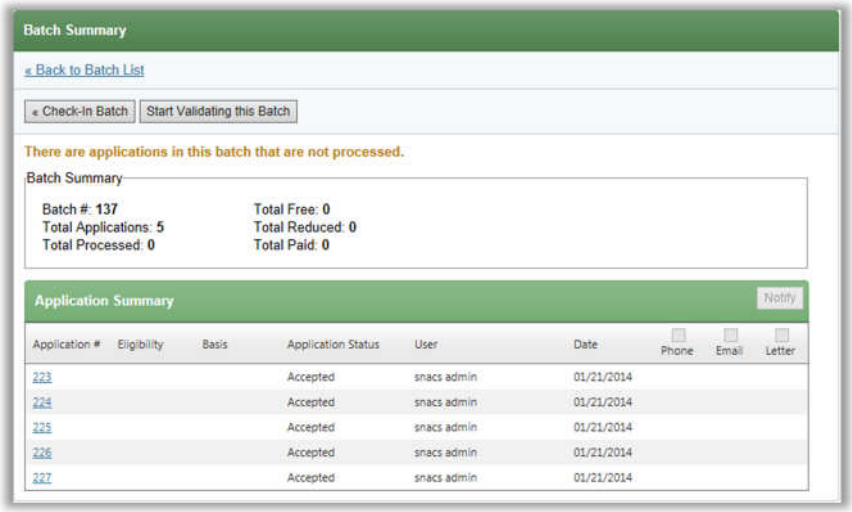
- Click a **Batch #** link.

✪ **Note**:

The Check-In button appears grayed (not available).



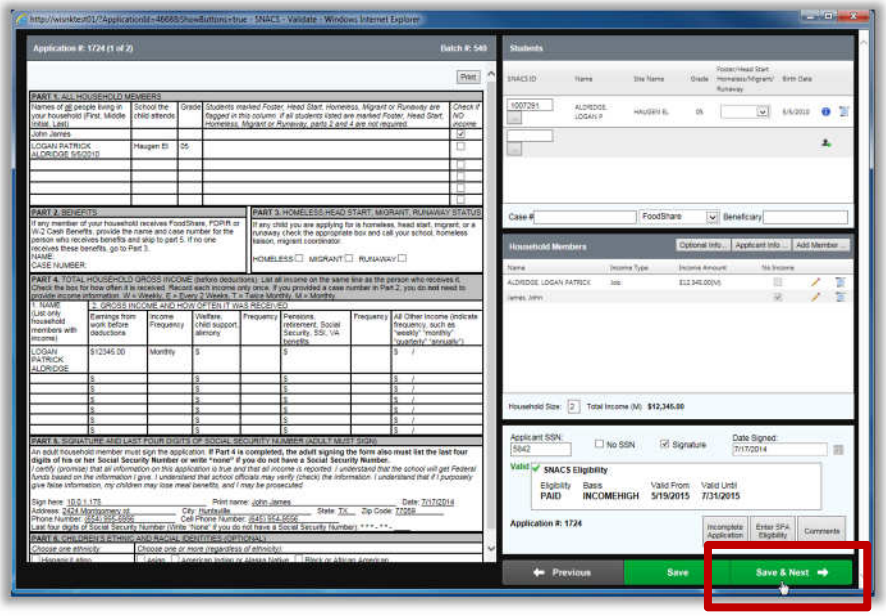
The Validation Workspace appears with the first application in the batch displayed.



The *Batch Summary* page appears "behind" the Validation Workspace with a list of all applications in the batch.

✪ **Note:**

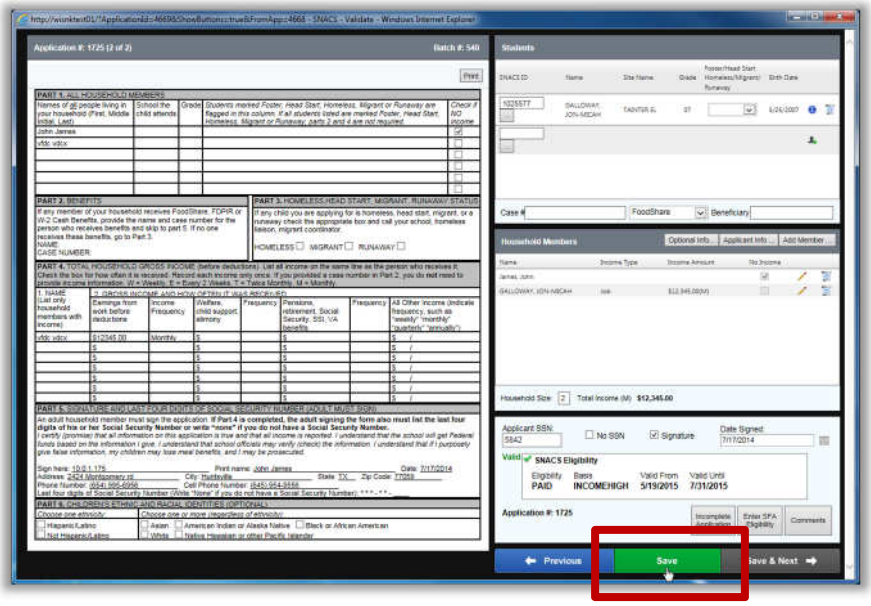
Applications that have been selected for verification are listed in the **Application Batches** list but are not available for processing. The **Application #** appears as standard text.



In the Validation Workspace.

- Review all data in the right-side pane with the data shown on the application in the left-side pane; make changes as needed.
- When all changes are complete, click

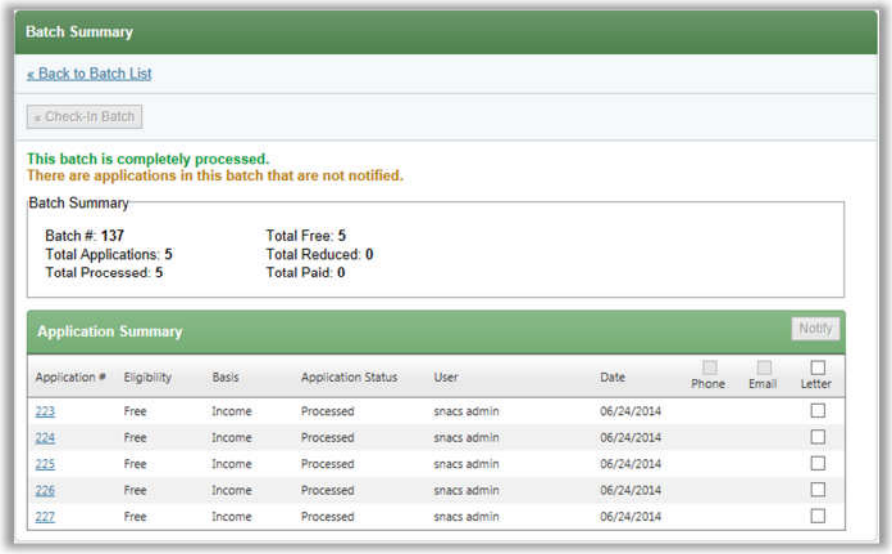
to display the next application in the batch.



In the Validation Workspace

- Continue to review and make updates on each application until the last application in the batch is completed.
- Click

.



The *Batch Summary* screen appears.

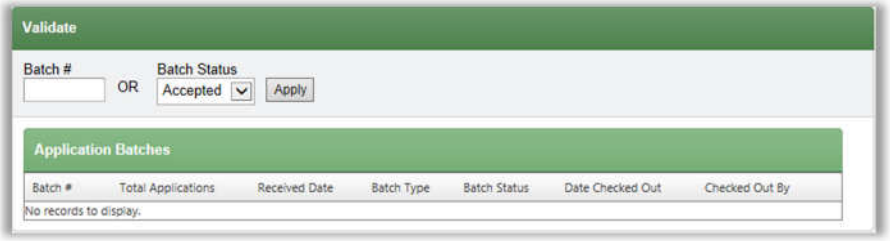
The **Check-In Batch** button is grayed-out. When the last application is completed and saved, the batch is automatically checked-in.

Two messages are shown

This batch is completely processed.

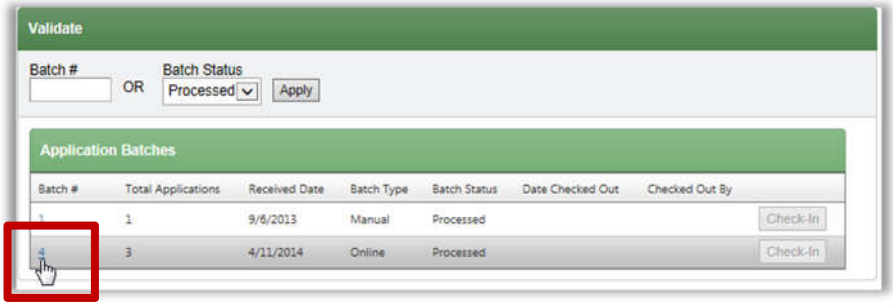
There are applications in this batch that are not notified.

- Click **< Back to Batch List**.



The processed batch no longer appears on the **Validate** page.

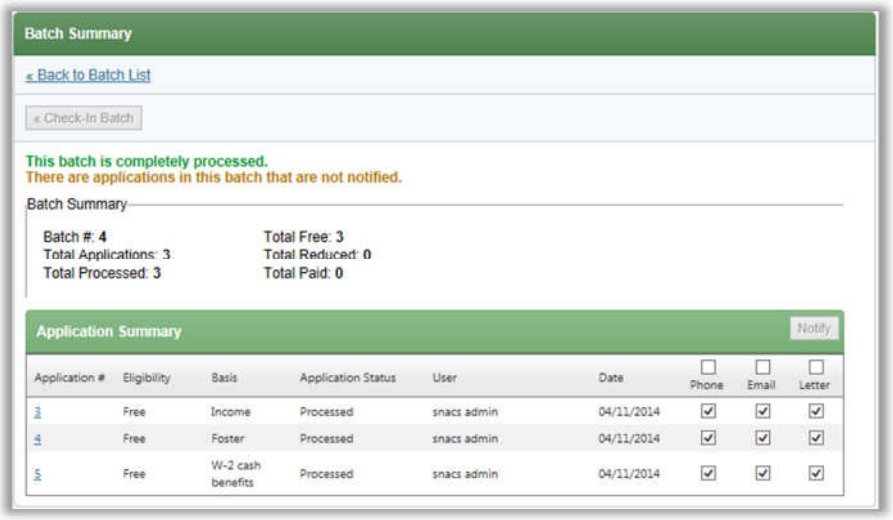
Viewing an Application Batch Summary



On the *Validate* page:

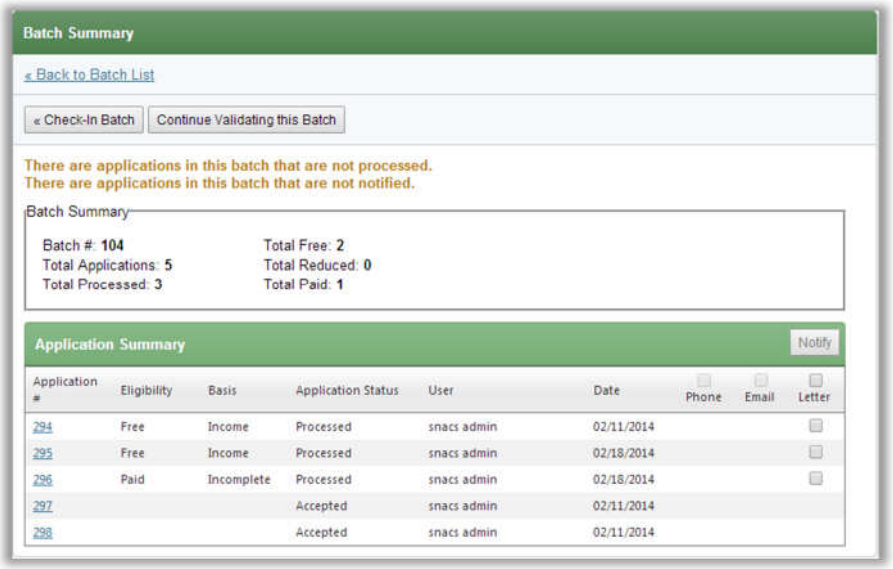
- Select "Processed" in **Batch Status** and click

.
- Click a **Batch #** link.



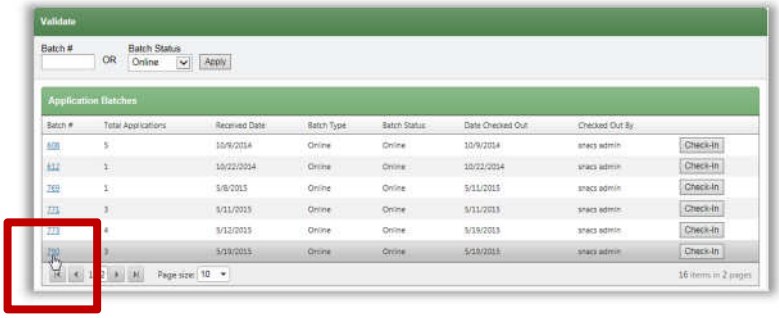
The *Batch Summary* page lists details about the batch as well as all applications in the batch.

In this example, all applications have been processed but no notification has been sent.



This second example shows a batch that is partially processed—two applications have not been processed.

Continuing Validation

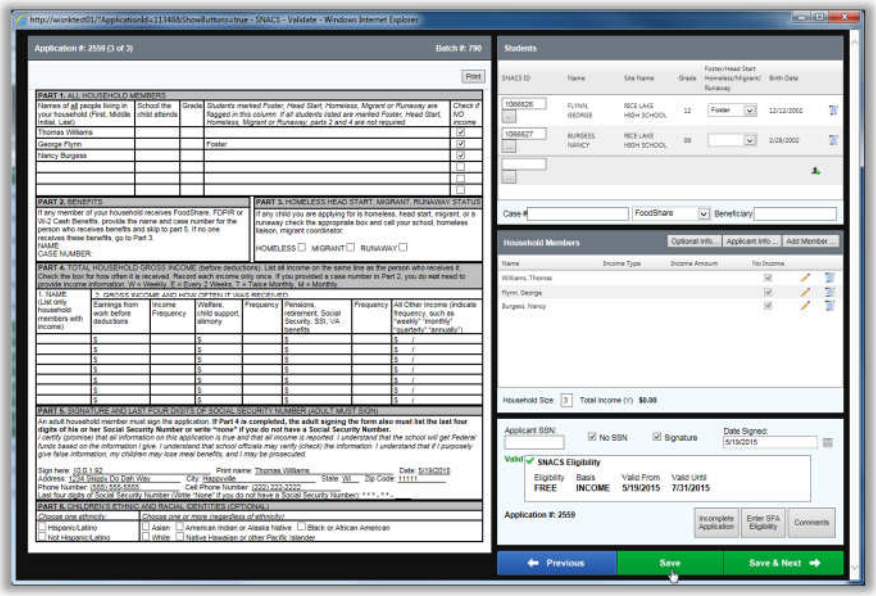


Validation of all applications in a batch at one time is not required. At any time, you may choose to click **Close** ( ) on the Validation Workspace toolbar to stop the validation process.

In this example, the second batch has some unprocessed applications (Check-In button is available).

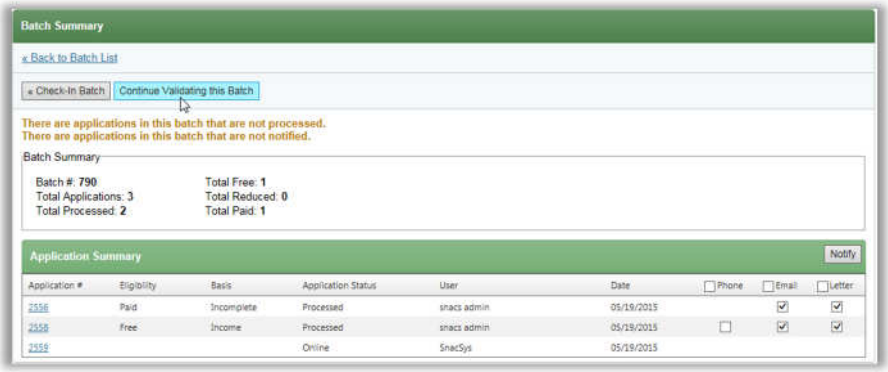
To continue processing an application batch, on the *Validate* page

- Select a **Batch Status** and click Apply .
- Click a Batch # link.



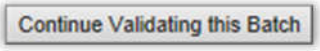
The first unprocessed application in the batch appears in the Validation Workspace.

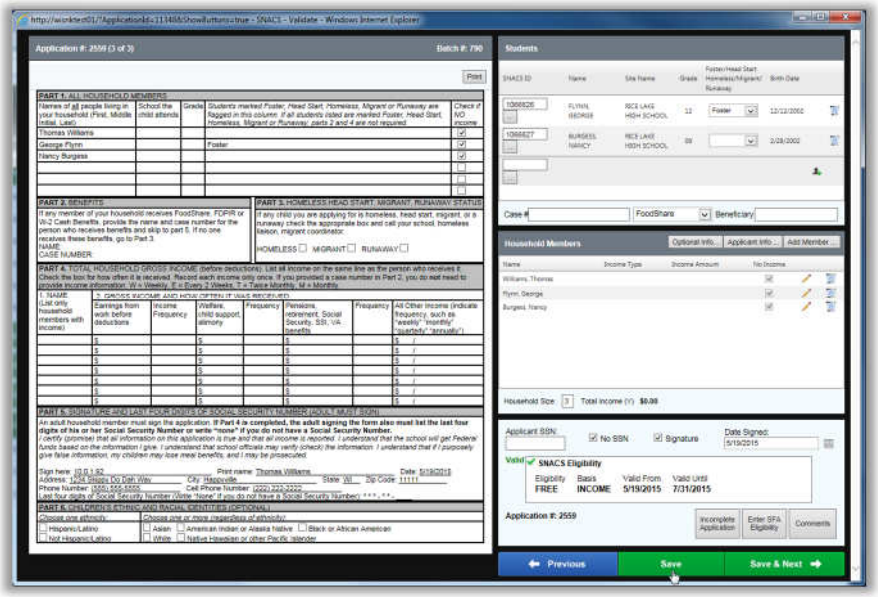
Process the application and click the appropriate button to continue to the next application or end the batch processing.



Optionally, the process of continuing the validation process can be started from the Batch Summary page if you have closed the Validation Workspace with unprocessed applications still in the batch.

- Click

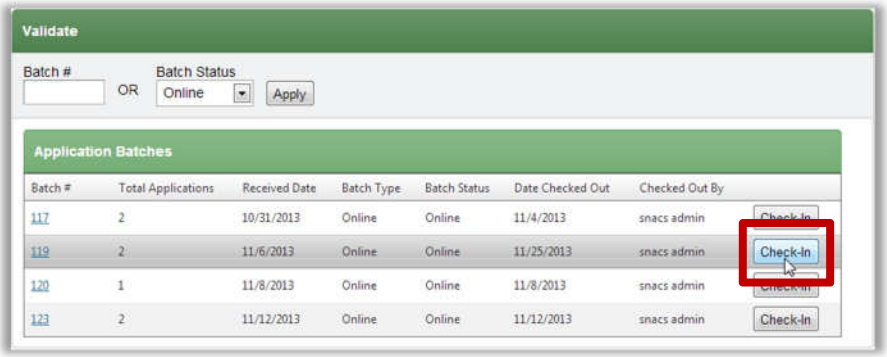




The first unprocessed application in the batch appears in the Validation Workspace.

Process the application and click the appropriate button to continue to the next application or end the batch processing.

Checking In a Batch



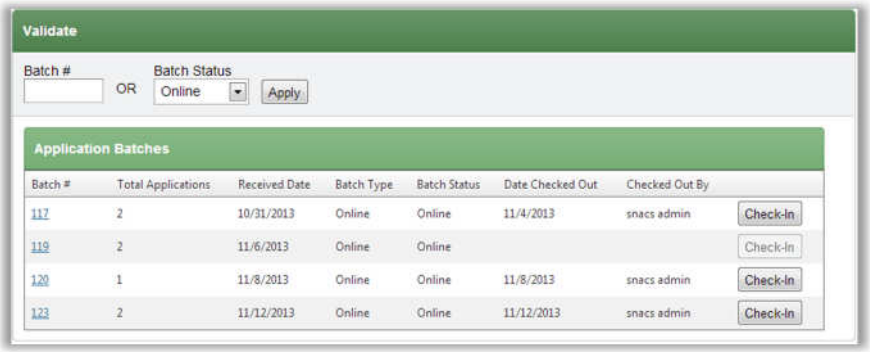
A batch is automatically checked out by the

- User who begins processing a batch
- User who manually entered application data (manual applications).

When multiple people are processing application batches, you can "check- in" the batch so that others can make changes to applications in the batch.

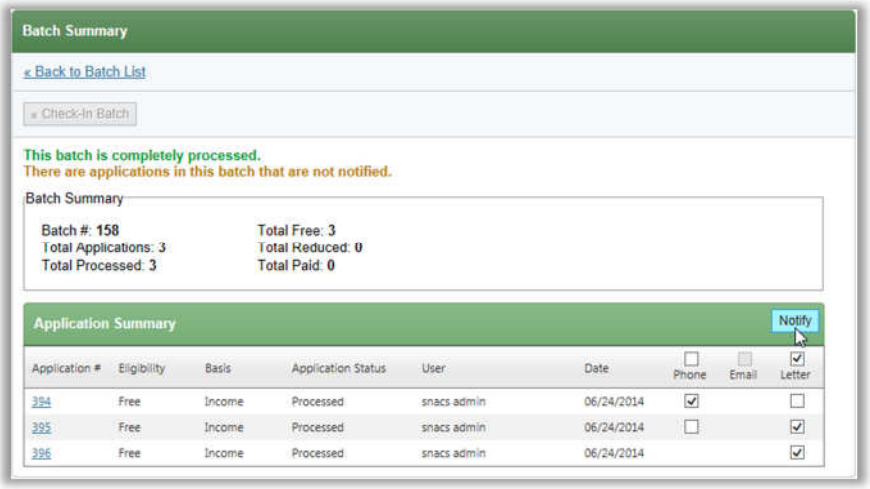
On the *Validate* page:

- Display a list of batches.
- Click Check-In in an application batch listing.



After check in, the Check-In button is unavailable for that batch indicating that the batch is not currently checked out.

Click the **Batch #** link to view a list of applications included in the batch.



Each application listing provides final details for the application.

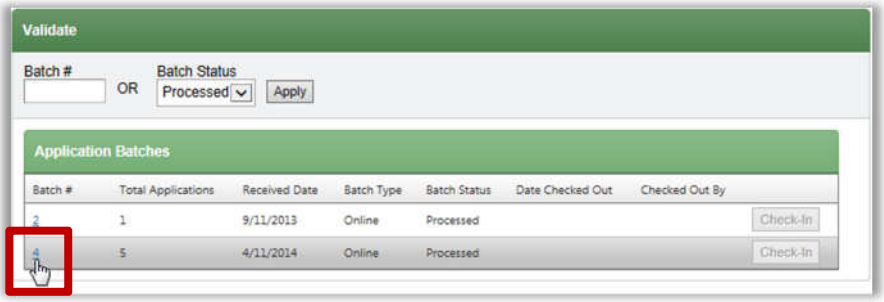
If an application is (or has completed Verification) the application cannot be opened.

Also, no Validate is available in the View Application window when the application is displayed through Master Index.

However, notification may be available from this screen, if needed.

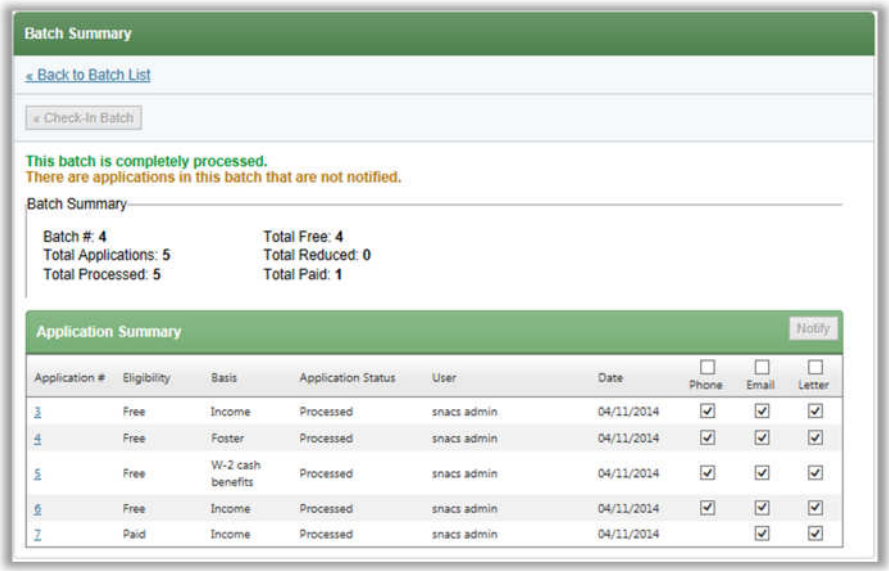
Notifying Processed Application Batches

At a minimum, all applications may be notified by letter. Notification may also be made by email and/or phone when the applicant specifies to receive notification by those methods ***and*** includes an email address and/or phone number on the application. (Note: per USDA regulations, Paid applications cannot be notified by phone.)



Notification can be completed for batches that include all processed applications.

- Select "Processed" in **Batch Status** and click Apply .
- Click a **Batch #** link.



Three types of notification are available: Phone, Email, and/or Letter. Checkboxes are checked for the notification type specified by the applicant.

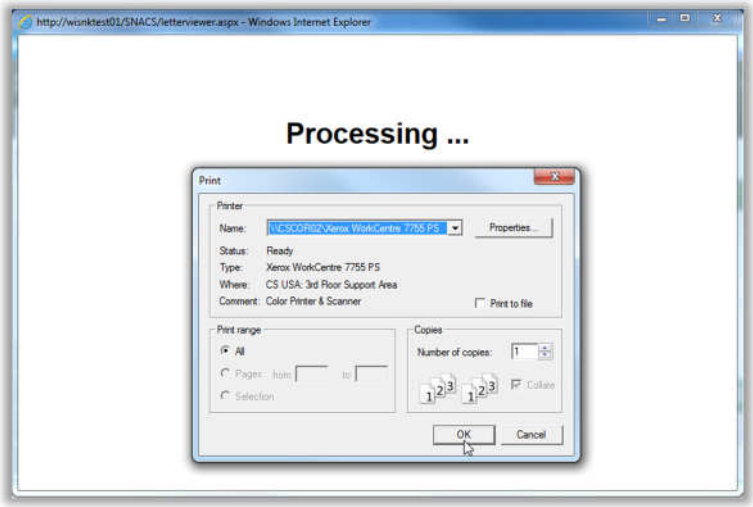
Notice that the last application does not have a selected check box for Phone notification—the applicant did not request notification by phone and/or did not provide a phone number.

To reduce paper waste or spamming by email, click the header check boxes to remove the individual selections, when needed.

To notify the applicants

- Select one or more available notification methods in the application listings.
- Click Notify .

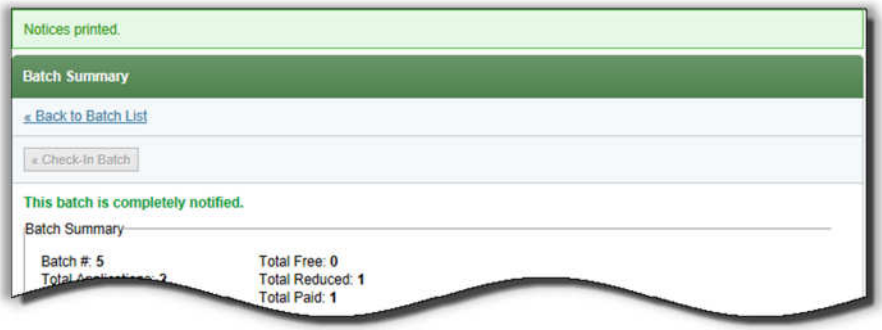
Letter Notification



Letter notification appears with the Print popup.

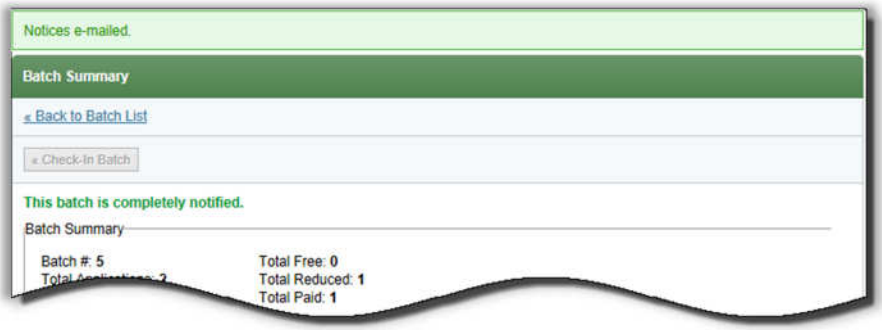
- Click OK to send the letter(s) to the printer.

Letter notification is complete when the letters are printed.



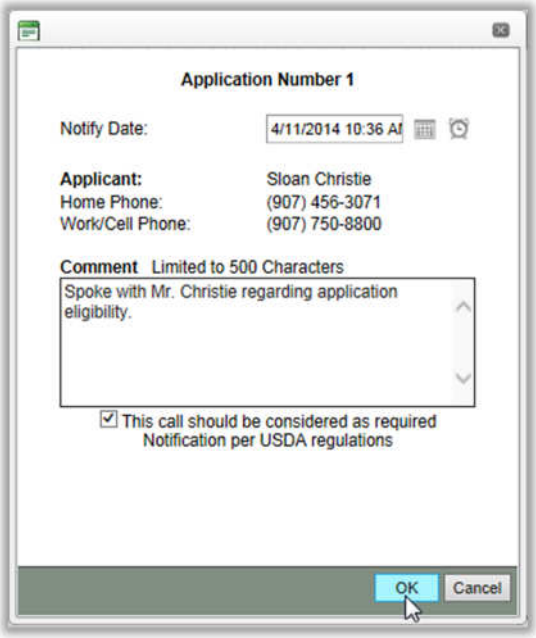
A print message appears on the Batch Summary page.

Email Notification



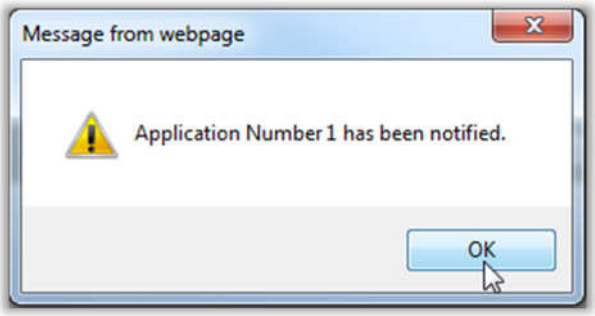
Email notification does not display any interim messages. An "emailed" message appears on the Batch Summary page when email message processing is complete.

Phone Notification



Phone notification appears with the Phone Notification popup.

- Change the **Notify Date** (and/or time) if needed.
- Enter a **Comment**.
- Clear **This call should be considered as required Notification per USDA regulations** if needed.
- Click OK .



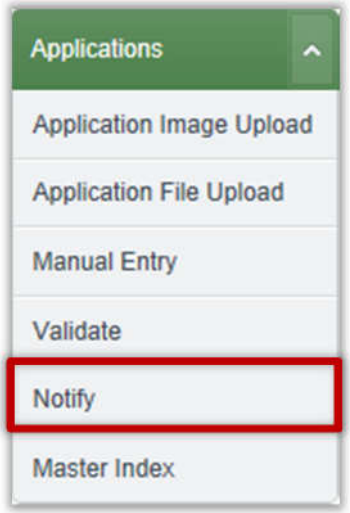
Phone notification is complete when the popup confirmation message appears.

- Click OK .

✪ **Note**:

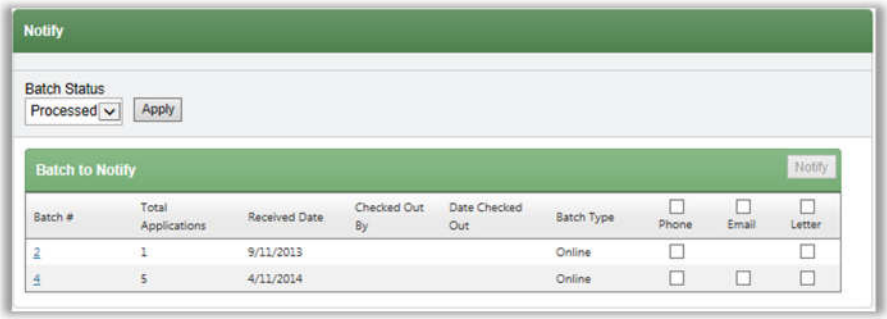
- If the **This call should be considered as required Notification per USDA regulations** check box is cleared, the application will not be marked Notified.

Notify



Notify prints notification letters, sends notification emails or allows the user to document notification phone calls for applications after all applications in the batch have been processed. Notifications are generated for one or more batches, individual recipients, or a combination of the two, if needed.

Notification letters are addressed according to the information provided on the **Applicant Info** pop up in the **Validate** function.



Note: Notification by phone is not allowed for applications with Paid eligibility.

By default on the *Notify* page

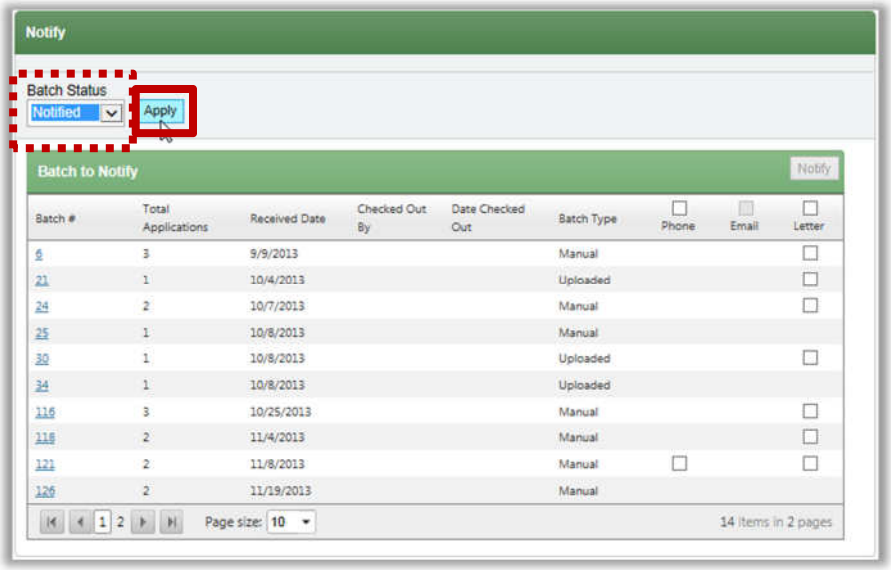
- **Batch Status** is set to "Processed".
- All Processed batches are listed.
- Email, Phone and Letter notification check boxes are listed when the applications in the batch include the corresponding information. For example, the Email check box appears in the batch listing when at least one application includes an email address.

Page Functions

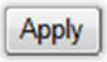
Field/Button	Description
Apply	Click to refresh the page to display all batches that meet the selected criteria.
Notify	Click to send a print request; button appears when one or more batches are selected.

Table 2.9 Notify Page Functions

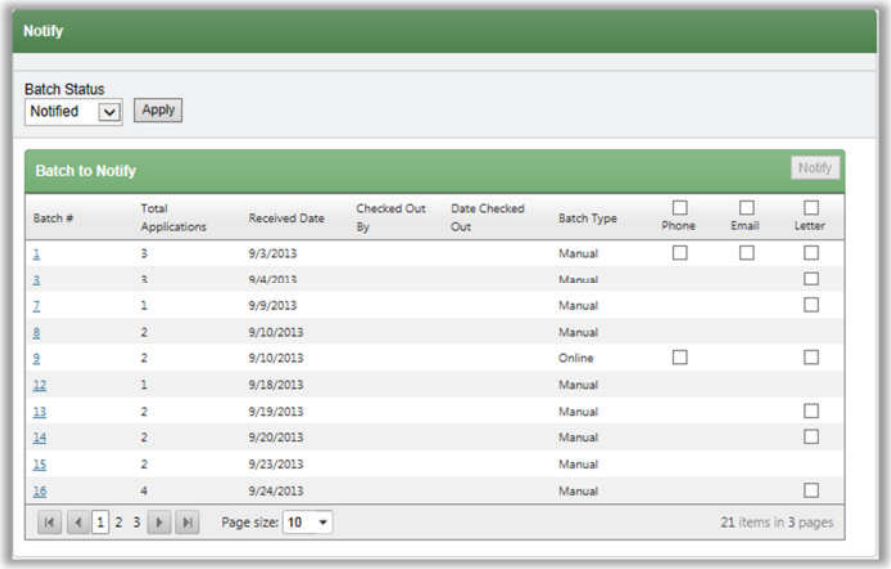
Listing Application Batches



On the *Notify* page

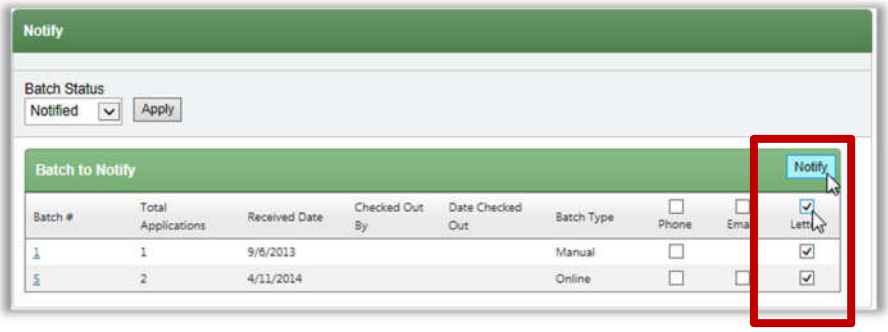
- Select a status in **Batch Status**.
- Click 

.



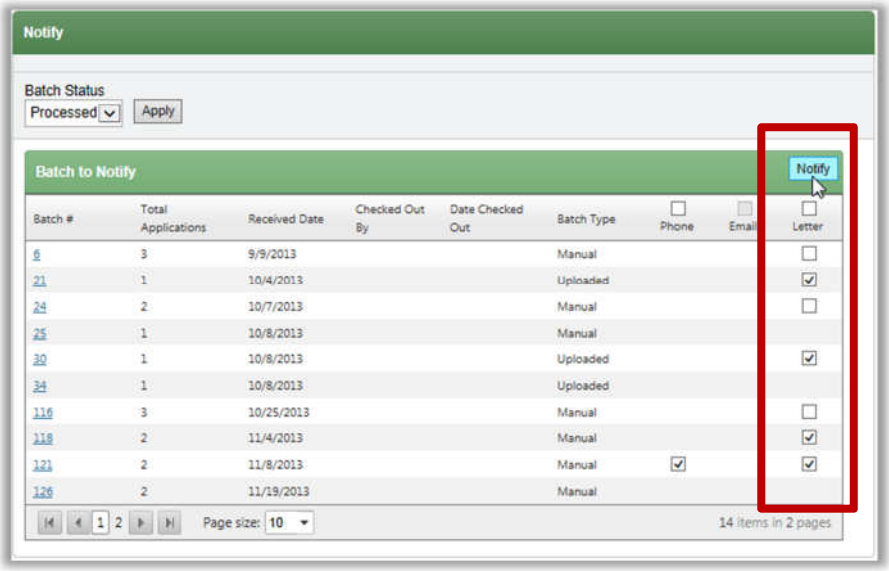
All batches of the selected status are listed in **Batch to Notify**.

Sending Notification of Individual Batches



To select all batches on the *Notify* page

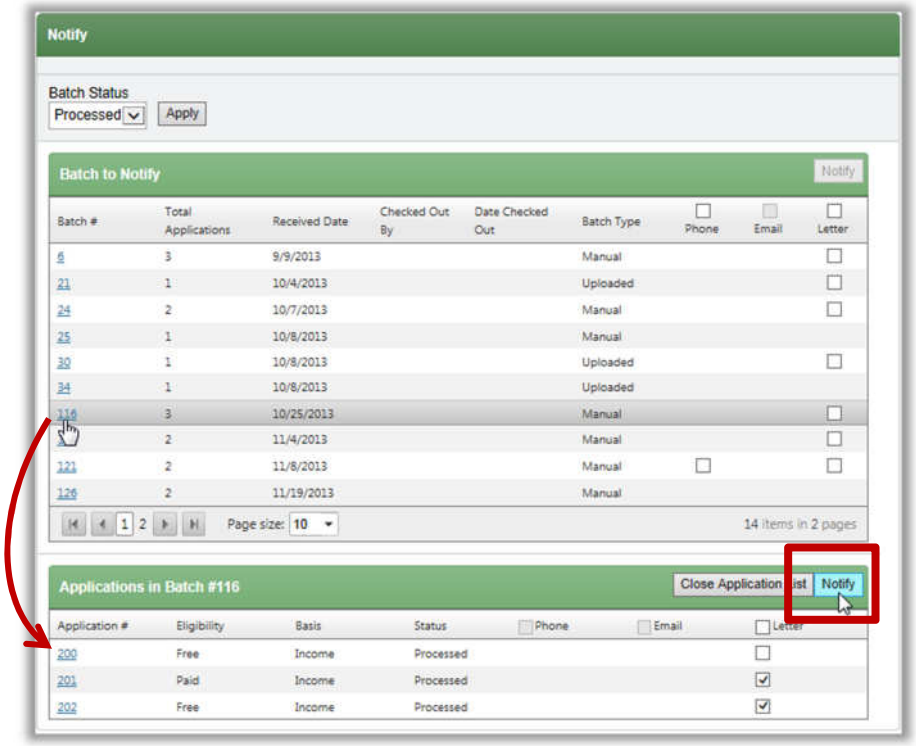
- Select in the **Batch to Notify** list header for a notification type; checkmarks are applied to each checkbox for all listed batches.
- Click Notify .



To select individual batches on the *Notify* page

- Select in each batch listing for the corresponding desired notification type.
- Click Notify .

Sending Notification for Individual Applications



To print individual application notifications on the *Notify* page

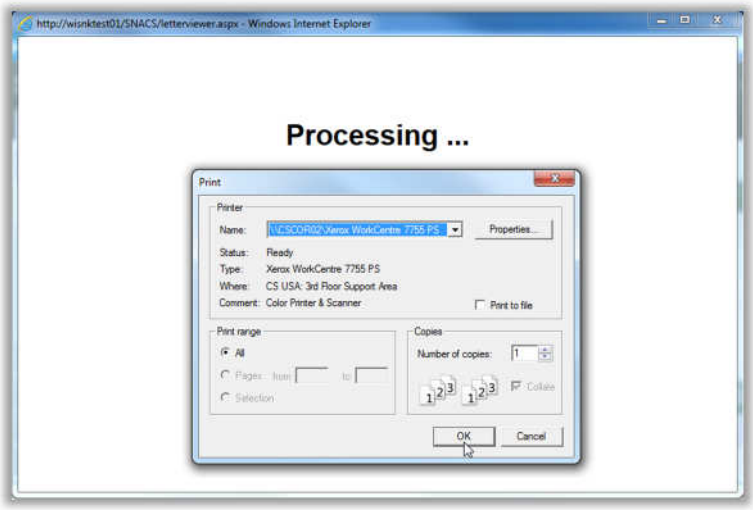
- Click a **Batch #** link in the **Batch to Notify** list.
- Select ☐ in individual application listings.
- Click Notify in the **Applications in Batch #** list.

The various notification popups appear according to the selected notification types. Refer to pages 78 - 79 for examples of notification popups.

Processing Notification

After selecting the type of notification to be used for a batch or application, clicking Notify starts notification processing. Responses for each type depends on the selected type.

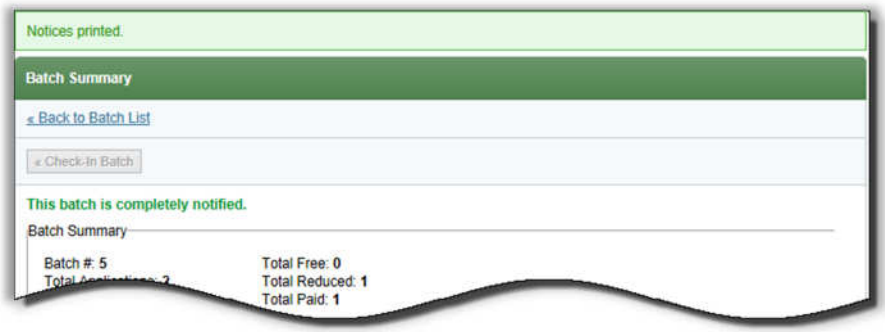
Letter Notification



Letter notification appears with the Print popup.

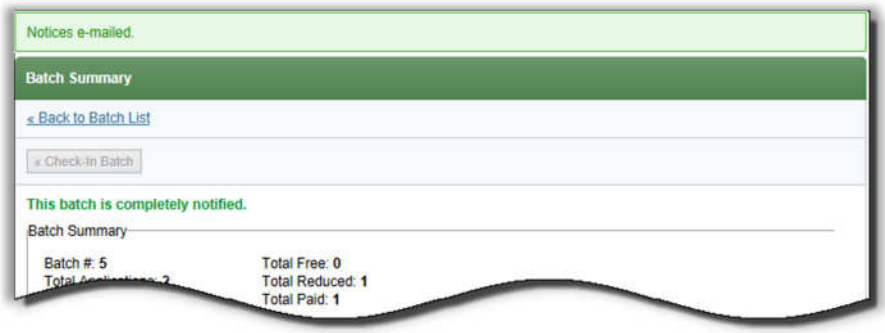
- Click OK to send the letter(s) to the printer.

Letter notification is complete when the letters are printed.



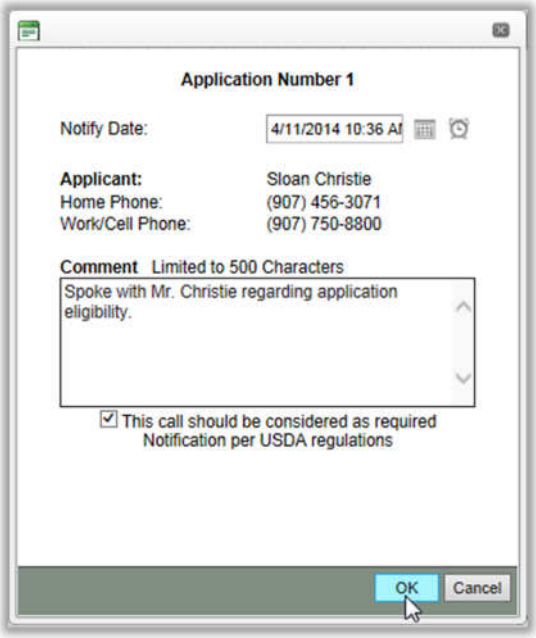
A print message appears on the Batch Summary page.

Email Notification



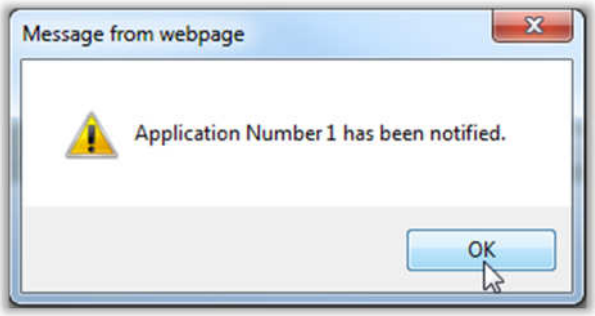
Email notification does not display any interim messages. An "emailed" message appears on the Batch Summary page when email message processing is complete.

Phone Notification



Phone notification appears with the Phone Notification popup.

- Change the **Notify Date** (and/or time) if needed.
- Enter a **Comment**.
- Clear **This call should be considered as required Notification per USDA regulations** if needed.
- Click OK .



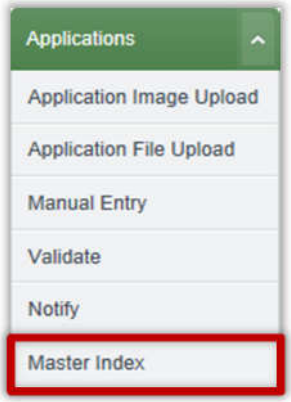
Phone notification is complete when the popup confirmation message appears.

- Click OK .

✪ **Note**:

If the **This call should be considered as required Notification per USDA regulations** check box is cleared, the application will not be marked Notified.

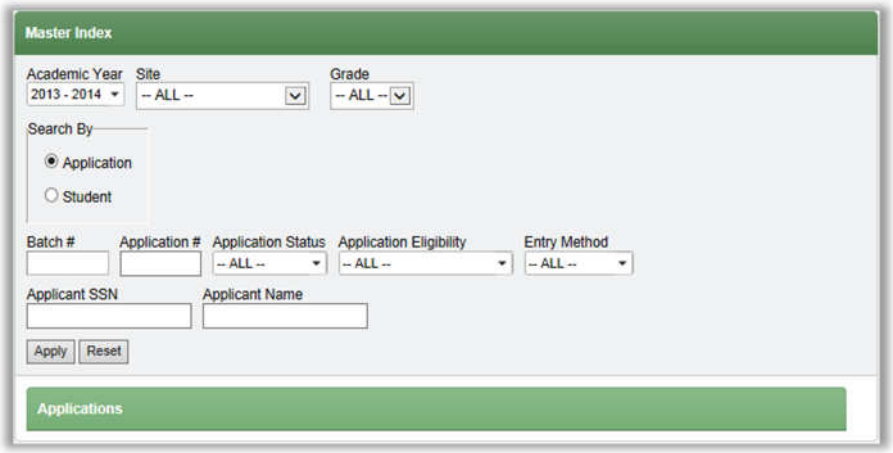
Master Index



Master Index is an electronic paper filing cabinet that holds all processed or uploaded applications. Applications can be searched for by

- Application
- Student

Eleven different search conditions can be used to narrow or expand the application search.



By default on the *Master Index* page

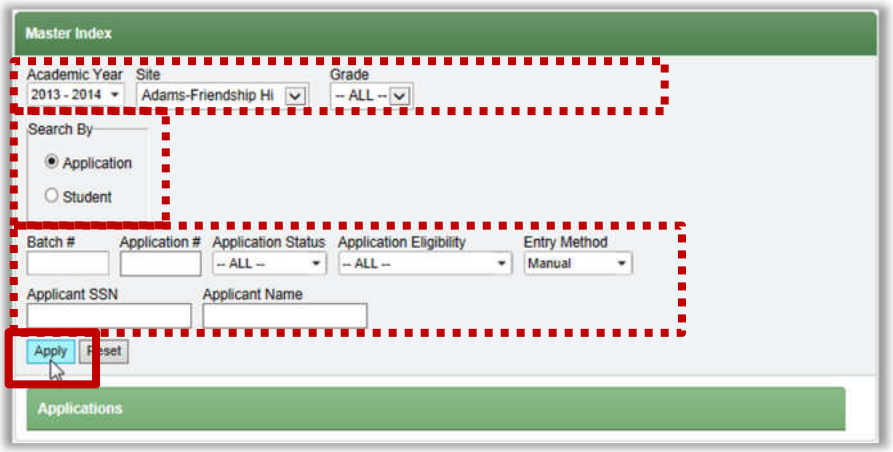
- **Academic Year** is set to the current year.
- **Site** and **Grade** are set to "-ALL-"
- **Search By** is set to "**Application**".
- **Application Status**, **Eligibility**, and **Entry Method** are set to "-ALL-"
- All remaining fields are clear.

Page Functions

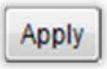
Field/Button	Description
Apply	Click to list all applications that meet the selected search conditions.
Reset	Click to clear all search conditions.

Table 2.10 Master Index Page Functions

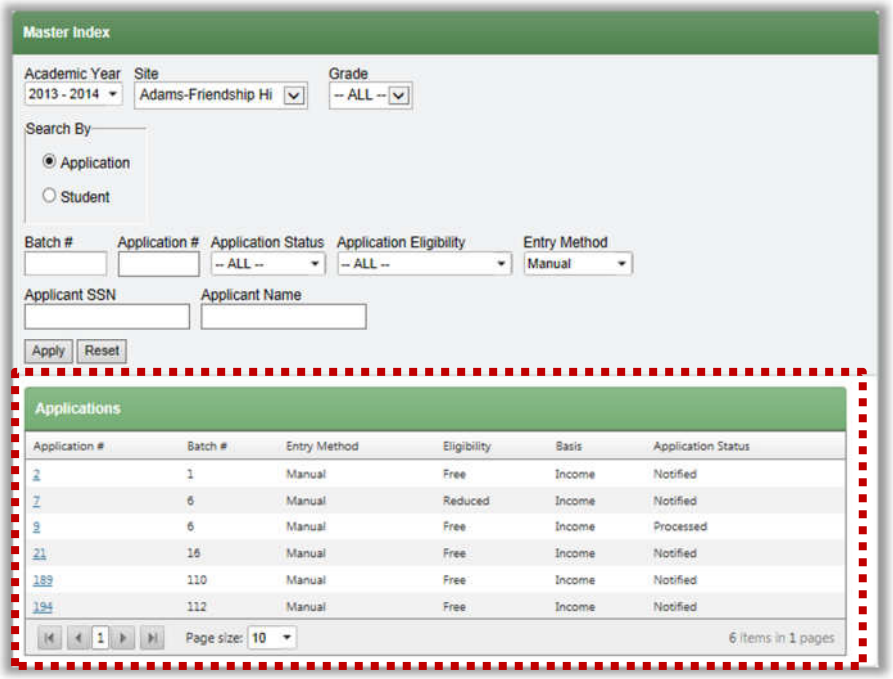
Searching for an Application



On the *Master Index* page

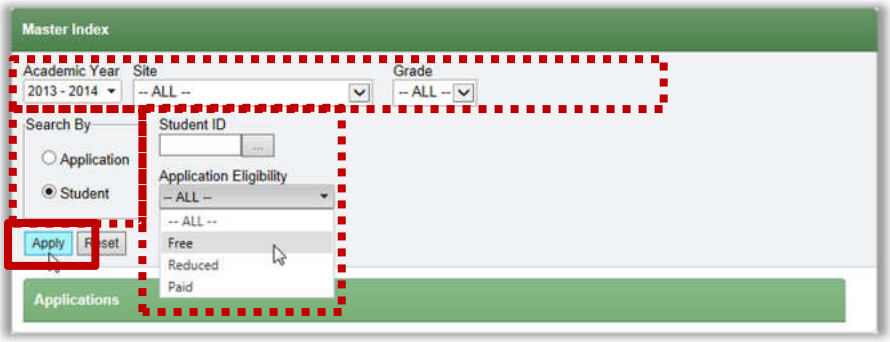
- Select an **Academic Year**, **Site**, and **Grade**, as needed.
- In the **Search By** group, select a search option.
- Select or enter search conditions as needed.
- Click 

.



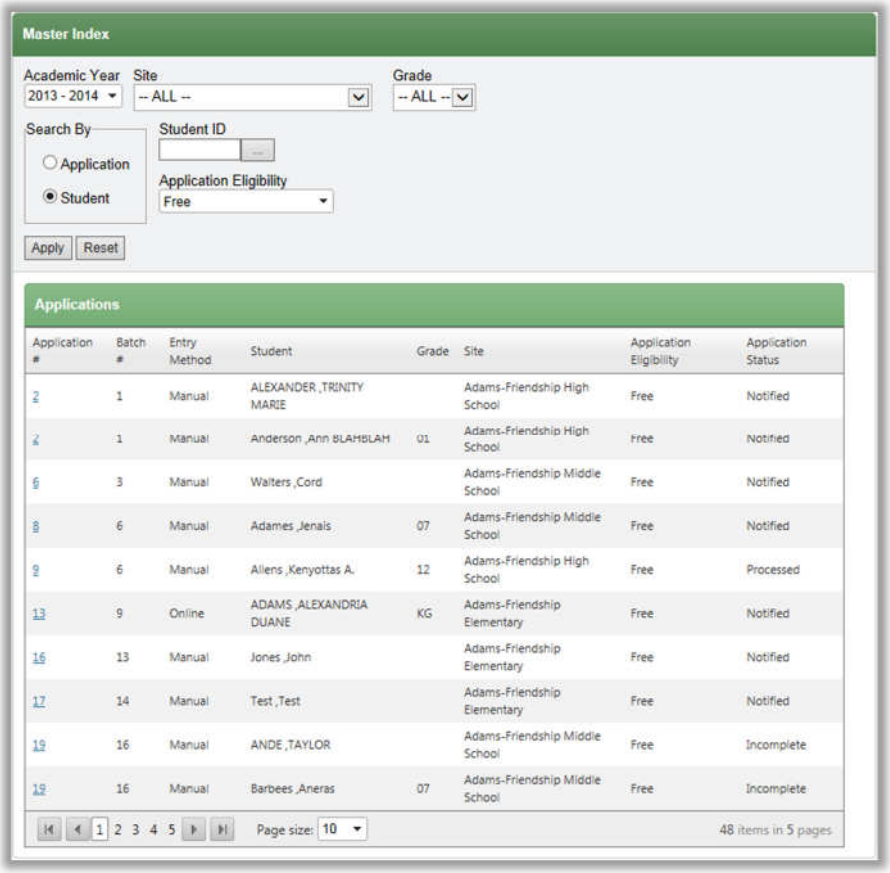
All applications that meet the search conditions are shown in the **Applications** list.

Searching for a Student



On the *Master Index* page

- Select an **Academic Year**, **Site**, and **Grade**, as needed.
- In the **Search By** group, select "**Student**".
- Select a **Student ID** or **Application Eligibility** as needed.
- Click Apply .



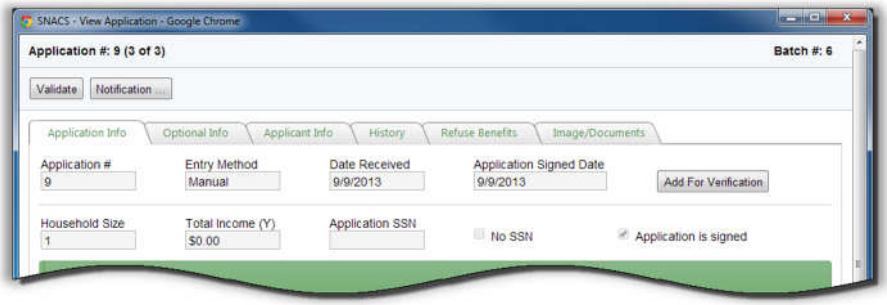
Application #	Batch #	Entry Method	Student	Grade	Site	Application Eligibility	Application Status
2	1	Manual	ALEXANDER ,TRINITY MARIE		Adams-Friendship High School	Free	Notified
2	1	Manual	Anderson ,Ann BLAHBLAH	01	Adams-Friendship High School	Free	Notified
6	3	Manual	Walters ,Cord		Adams-Friendship Middle School	Free	Notified
8	6	Manual	Adames ,Jenais	07	Adams-Friendship Middle School	Free	Notified
9	6	Manual	Allens ,Kenyottas A.	12	Adams-Friendship High School	Free	Processed
13	9	Online	ADAMS ,ALEXANDRIA DUANE	KG	Adams-Friendship Elementary	Free	Notified
16	13	Manual	Jones ,John		Adams-Friendship Elementary	Free	Notified
17	14	Manual	Test ,Test		Adams-Friendship Elementary	Free	Notified
19	16	Manual	ANDE ,TAYLOR		Adams-Friendship Middle School	Free	Incomplete
19	16	Manual	Barbees ,Aneras	07	Adams-Friendship Middle School	Free	Incomplete

All applications that meet the search conditions are shown in the **Applications** list.

Viewing an Application

On the *Master Index* page

- Display a list of applications.
- Click an **Application #** link.



The *View Application* window appears.

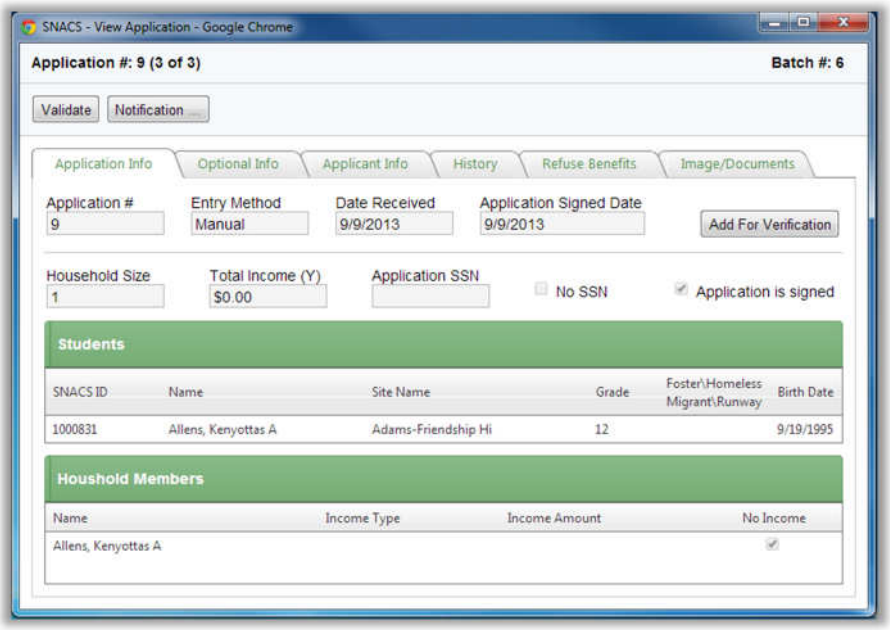
If the application has not been included in the Verification process, the **Application Info** tab appears in the window. Application details are shown that provide the application number in the batch, total number of applications in the batch, and the batch number.

If the application has been included in the Verification process, the **Verification Response** tab appears in the window.

Two buttons appear below the application details:

- Click Validate to open the application in the Validation Workspace window. (This button will not be displayed if the application has been selected for Verification).
- Click Notification ... to view and print the notification letter.

The number of tabs shown for an application is dependent on the application status. In this example, the application status is "Verified". If the application status is "Processed", the last two tabs are not shown.



The **Application Info** tab displays all validated information. Information cannot be changed directly in this tab view. To make changes you must re-validate the application.

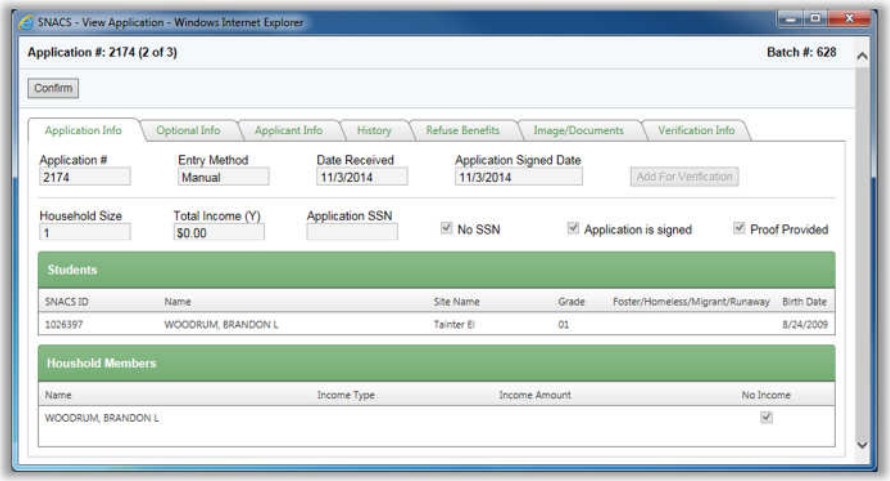
To include the application in the verification process, click

. The verification reason is marked "for cause" and is not part of the required sample.

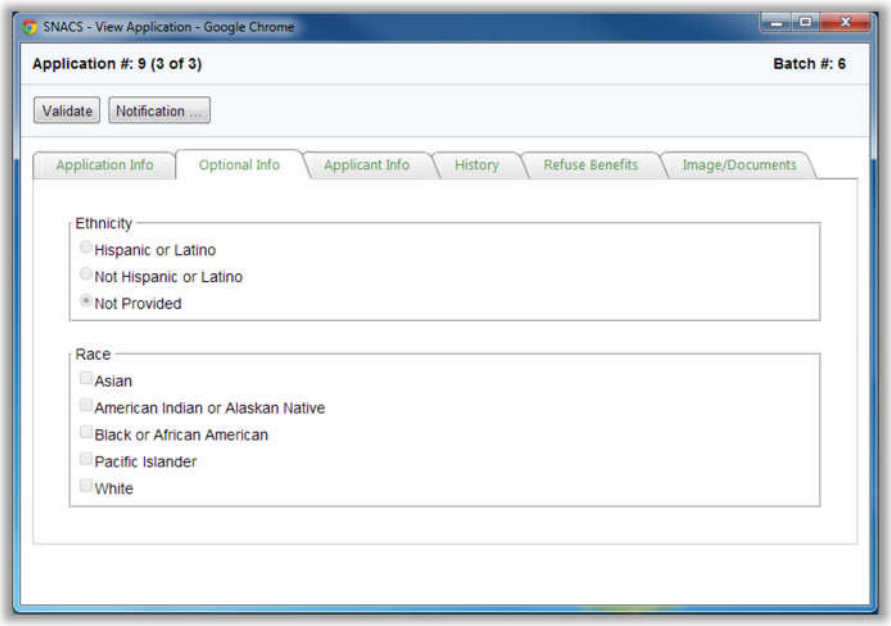
✪ **Note:**

The

button is available only after the application has completed the notification process.

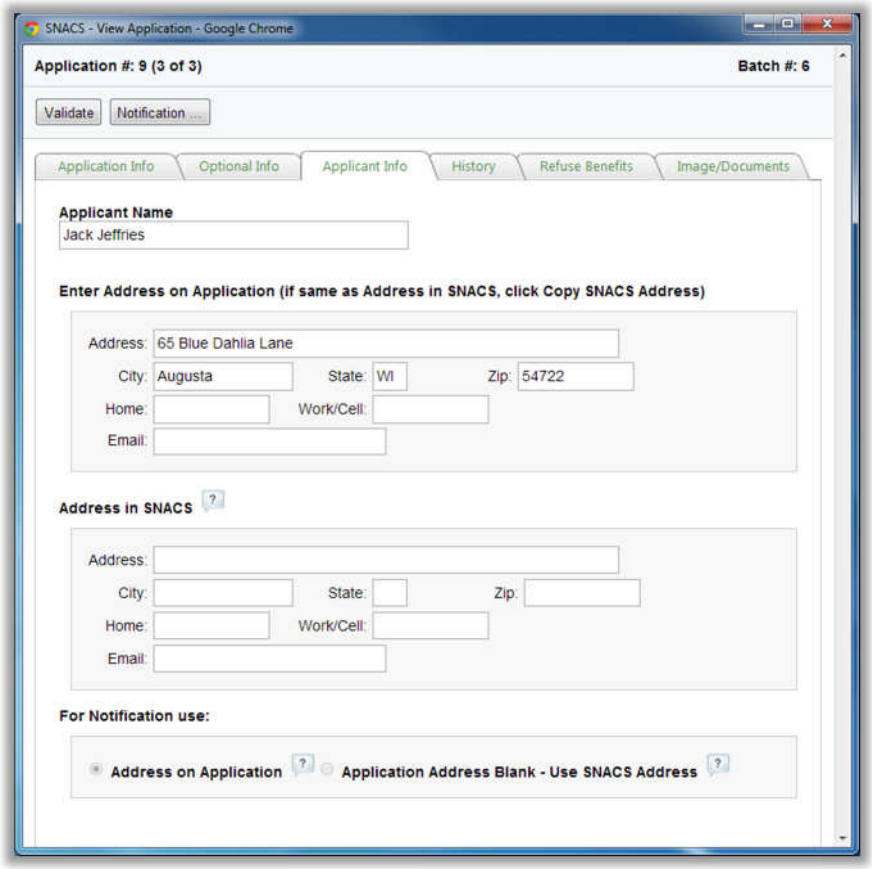


When a student is included on an application added for verification and the same student is added to a second application, the **Proof Provided** option appears on the **Application Info** tab.



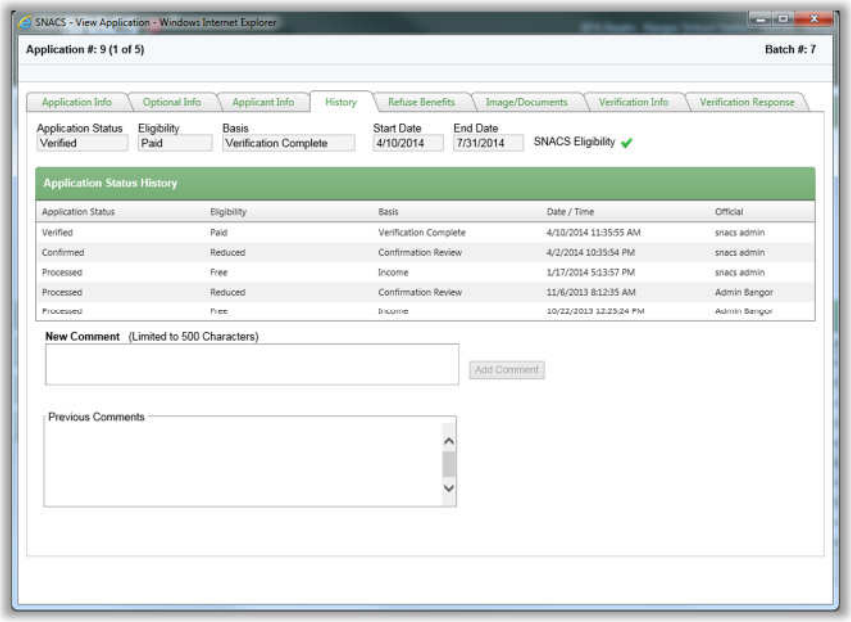
The **Optional Info** tab contains information submitted at the discretion of the household regarding ethnicity or race.

Information cannot be changed directly in this tab view. To make changes you must re-validate the application.



The **Applicant Info** tab contains all information displayed in the Applicant Information popup accessed from the Validation Workspace.

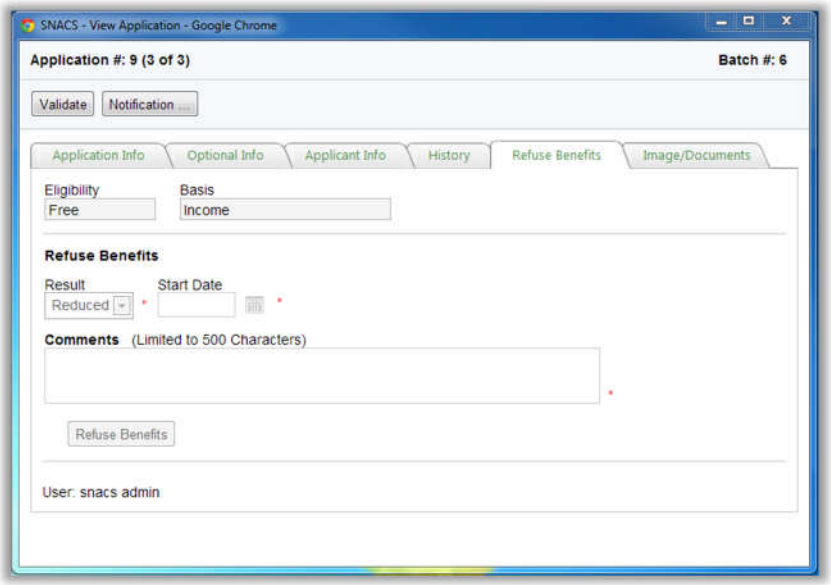
Information cannot be changed directly in this tab view. To make changes you must re-validate the application.



The **History** tab displays information regarding the determined eligibility for this application.

The **Application Status History** group details the date, time and SNACS user (Official) who completed each step in the application process.

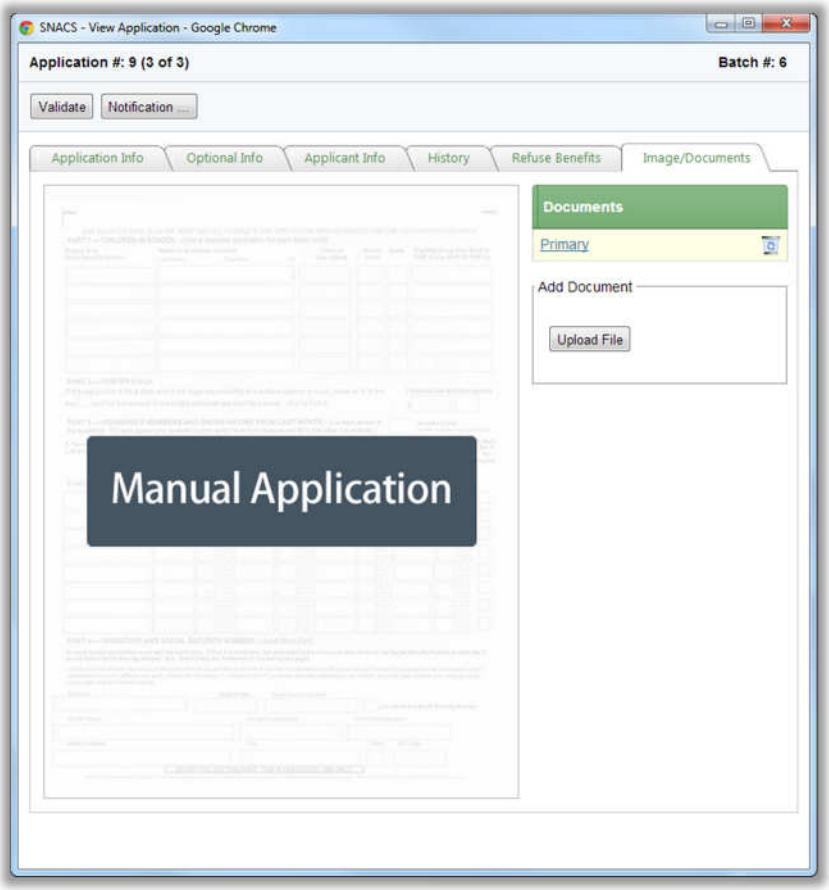
Comments are shown below the history listing. Previous comments are displayed below the **New Comment** entry box where new comments can be entered before clicking Add Comment.



The **Refuse Benefits** tab is where refusal of benefits is recorded.

If a parent refuses benefits

- Select a **Result**.
- Select a **Start Date**.
- Enter up to 500 characters in **Comments** to document the refusal.
- Click Refuse Benefits.



The **Image/Documents** tab

- Uploads images or other files.
- Displays a selected uploaded file.

To upload a document

- Click Upload File .
- Select a file.
- Click Upload .
- Enter a name for the document and click OK .

To delete a document

- Click in a file listing.
- In the confirmation prompt, click OK .

End of Chapter

Chapter 3: Agency Certifications

In this chapter you will learn how to:

- ✓ Upload a certification file.
- ✓ Upload supporting documents for an approval certification file.
- ✓ Manually match a student to a certified student.
- ✓ Search for and view an approval certification.
- ✓ Print one or more notification letters.
- ✓ Assign eligibility certification by eligibility, address, and guardian.
- ✓ Assign eligibility certification through a manual process.

Agency Certifications at a Glance

Menu Selection	Description
DC / Other Certifications	Manages uploading certification files and students in the uploaded files.
DC Sibling Matching	Assign eligibility certification through sibling match by eligibility, guardian, and address, or through a manual process.

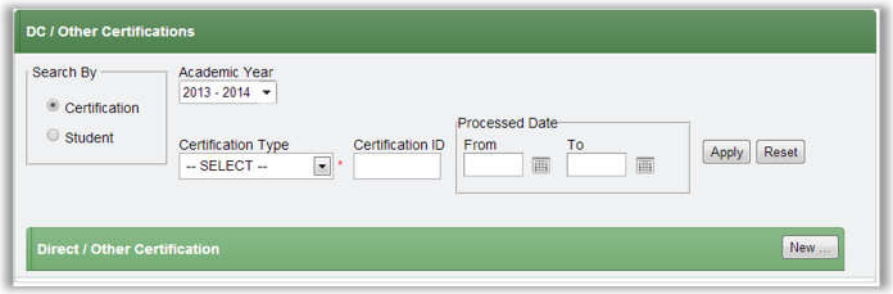
Table 3.1 Agency Certifications Menu Selections

Note
Categories and menu selections to which you have access in SNACS are those appropriate for your assigned role(s). When you access the **Agency Certifications** menu, you may see a subset of the menu selections listed above.

DC / Other Certifications

DC / Other Certifications is used to

- View uploaded direct certifications
- Upload direct certification files
- Print notification letters
- Manually match students in certification files



By default on the *DC / Other Certifications* page

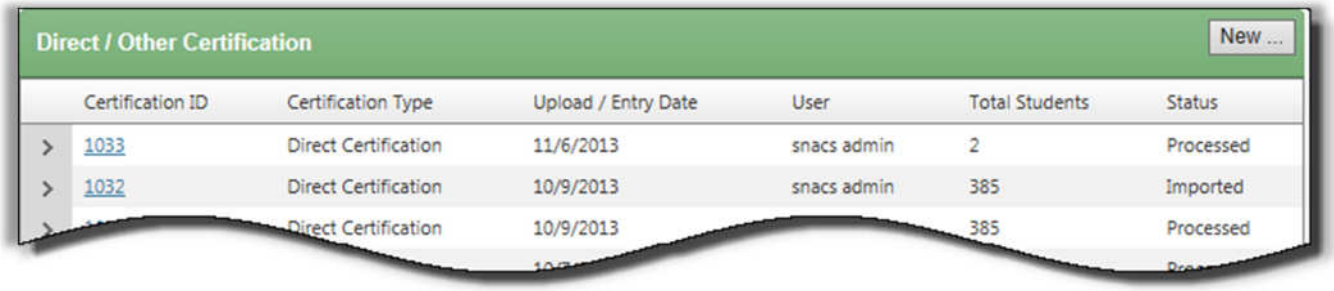
- **Search By** is set to "Certification."
- **Academic Year** is set to the current school year.
- **Certification Type** is set to "SELECT."
- **Certification ID** is blank.
- All remaining fields are blank (empty).

Page Functions

Field/Button	Description
Apply	Click to list all records that match the selected search criteria.
Reset	Click to clear all selected search criteria.
New ...	Click to display the **New Direct Certification** page; use the **New Direct Certification** page to upload a direct certification file or create an approval list.

Table 3.2 Direct Approvals Page Functions

Listings: Certification Lists

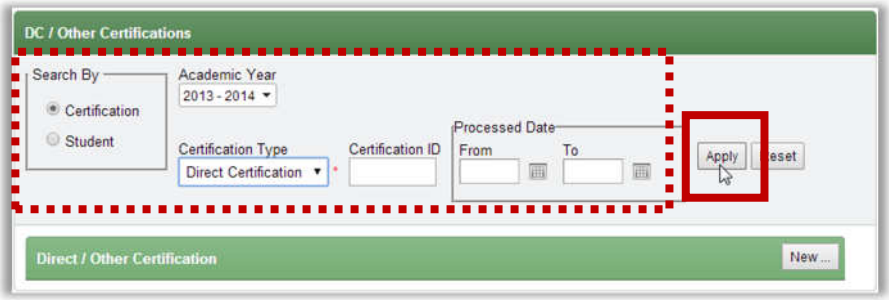


Each listing in **Direct / Other Certification** lists includes:

Header Name	Data Type	Description
Certification ID	***Clickable link***	*Sortable;* Identifier of certification file; assigned by SNACS.
Certification Type	*View only*	*Sortable;* Certification file type; possible types include: Direct Certification, Even Start, Foster, Head Start Homeless, Migrant, RCCI, Runaway
Upload / Entry Date	*View only*	*Sortable*; Date that the certification file was uploaded and changes were made to the respective student records.
User	*View only*	*Sortable*; User name that uploaded the certification file.
Total Students	*View only*	*Sortable;* Total number of students included it the certification file.
Status	*View only*	*Sortable;* Current status of uploaded file; "Imported" refers to file that has been uploaded to SNACS only, "Processed" refers to file that has been uploaded to SNACS and match process has been completed with file.

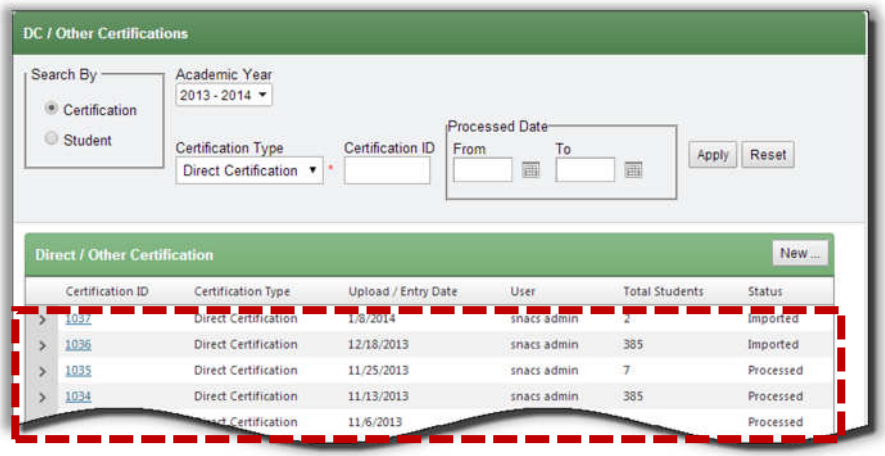
Table 3.3 Direct Certification Listings

Searching for Direct Certifications



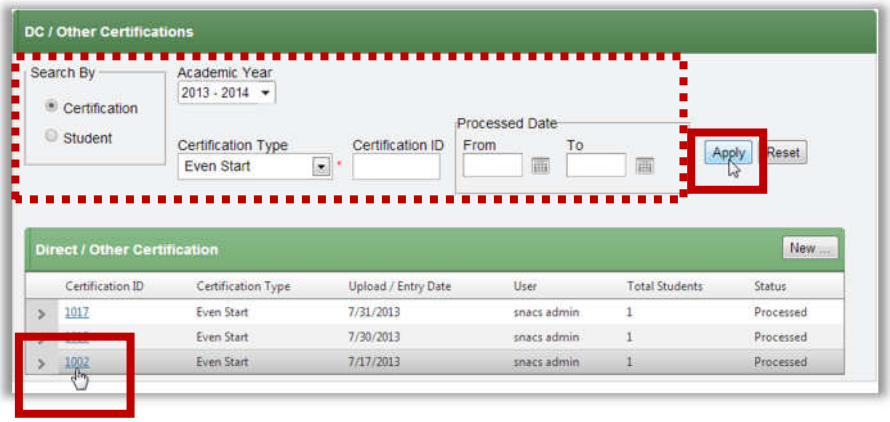
On the *DC / Other Certifications* page

- Select or enter one or more search criteria.
- Click Apply .



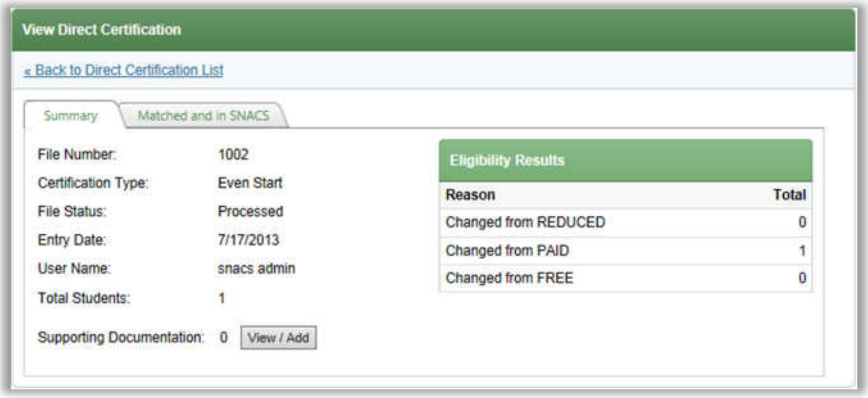
All approvals matching the selected criteria are shown in the **Direct / Other Certification** list.

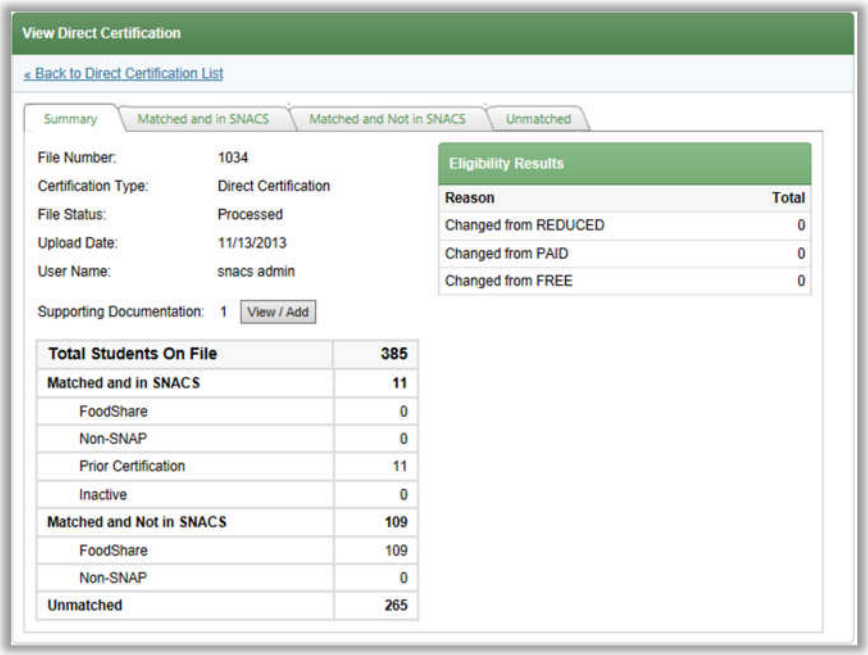
Displaying a Direct Certification



On the *DC / Other Certifications* page

- Use search criteria to display a list of approvals.
- Click a **Certification ID** link in an approval listing.





The **View Direct Certification** page appears. Two to four tabs may be available.

The **Summary** tab will always appear. This tab lists detailed information about the data shown on the various tabs.

In the first example on the left, a **Summary** tab for an Even Start file is shown.

In the second example, a **Summary** tab for a Direct Certification file is shown.

Summary Tab

The **Summary** tab details matching-result information for names included in the direct certification file.

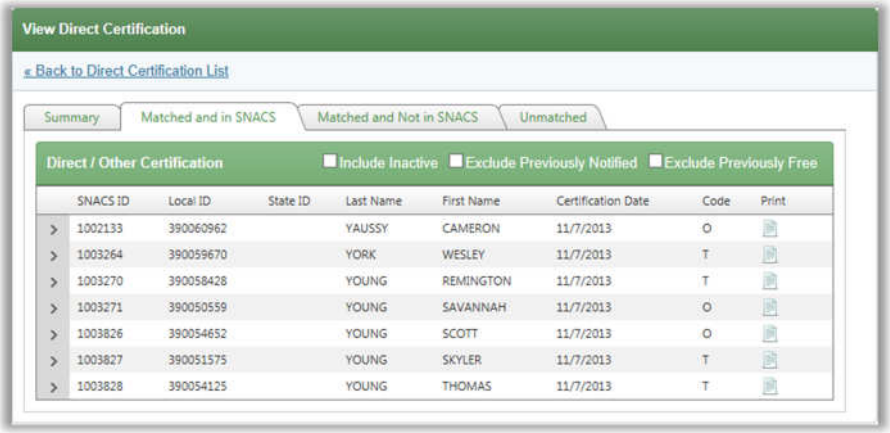
Available functions on the **Summary** tab include

Function	Description
View / Add	Click to add or view a file with supporting information for the upload file.

Table 3.4 Summary tab functions

✪ **Note**: Direct Certification files uploaded are automatically added to Supporting Documentation. Any supporting documentation received for other certification lists should be attached to the record.

Matched and in SNACS Tab



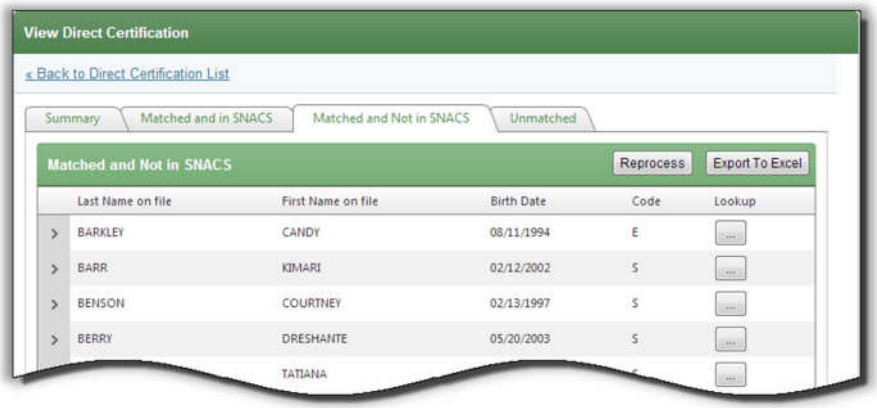
The **Matched and in SNACS** tab lists all records that should have benefits and matched a student record in SNACS.

Available functions on the **Matched and in SNACS** tab include

Function	Description
Include Inactive	Select to list both Active and Inactive students; by default only Active students are listed.
Exclude Previously Notified	Select to view only those students that have been sent notification.
Exclude Previously Free	Select to view only those students that did not have a previous Eligibility Reason of "Free".
	Click to view a Household letter as it will appear printed; **Print** can be clicked on the window toolbar to print the letter.

Table 3.5 Matched and in SNACS tab functions

Matched and Not in SNACS tab



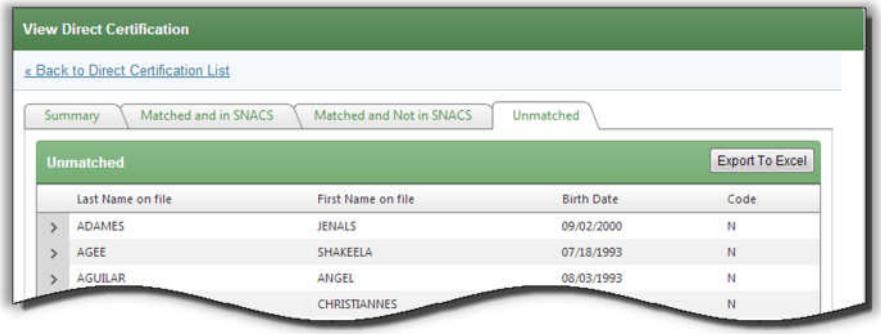
The **Matched and Not in SNACS** tab lists all records that should have benefits but did not match a student record in SNACS. (This tab will only appear for uploaded Direct Certification files.)

Available functions on the **Matched and NOT in SNACS** tab include

Function	Description
Reprocess	Click to reprocess students whose records have been updated and a match may be made.
Export To Excel	Click to place the displayed names in an MS Excel file; the Excel file is shown on the screen and can be edited, printed, etc.
... (**Lookup**)	Click to display the Lookup popup; use the Lookup to find and display the record of a student who matches the listing; student record can be updated to make a match. Matches can only be made if the student's first name, last name and date of birth matches the information in the file.

Table 3.6 Matched and NOT in SNACS tab functions

Unmatched Tab



The **Unmatched** tab lists all records that did not have eligibility or the student record submitted to DCF was a close, but not exact match to DCF records.

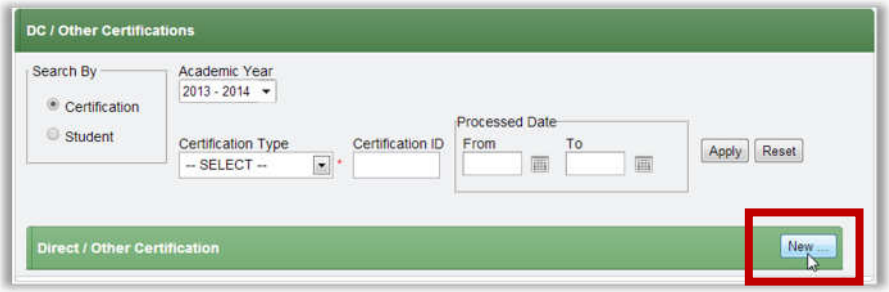
- Click to save the unmatched records to an MS Excel file.
- The Excel file can be used to research possible issues in student information submitted to DCF.

Available functions on the **Unmatched** tab include

Function	Description
Export To Excel	Click to place the displayed names in an MS Excel file; the Excel file is shown on the screen and can be edited, printed, etc.

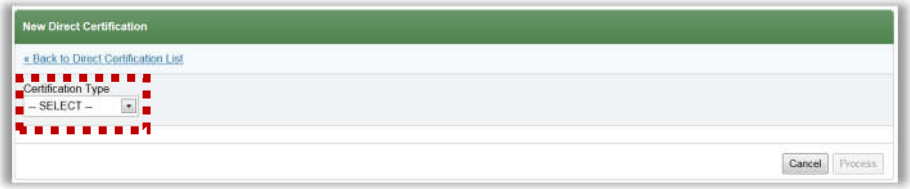
Table 3.7 Unmatched tab functions

Uploading a Certification File



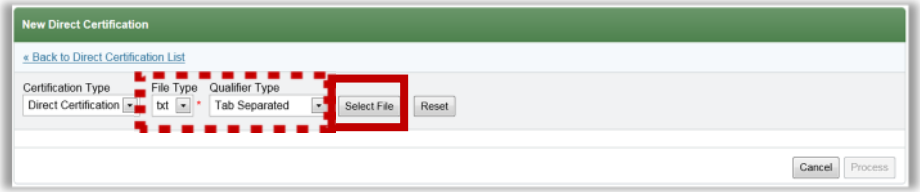
On the *DC / Other Certifications* page

- Click New ... .



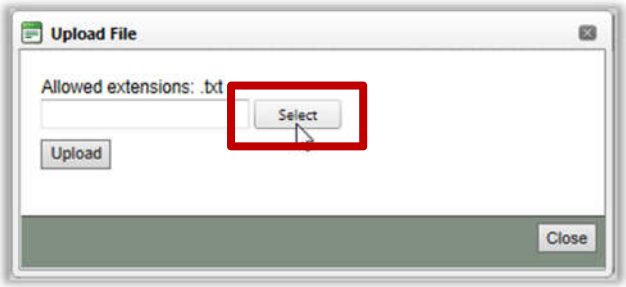
On the *New Direct Certification* page

- Select a **Certification Type**.



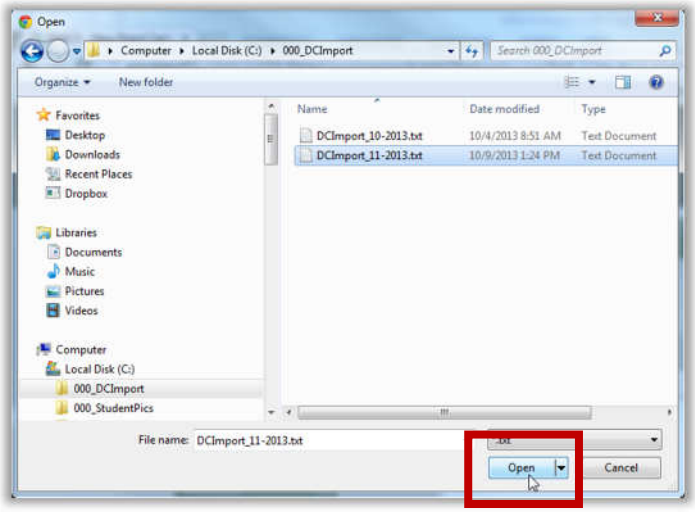
In the expanded *New Direct Certification* page

- Select a file type and a **Qualifier Type**, if needed.
- Click Select File .

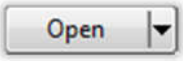


In the **Upload File** popup

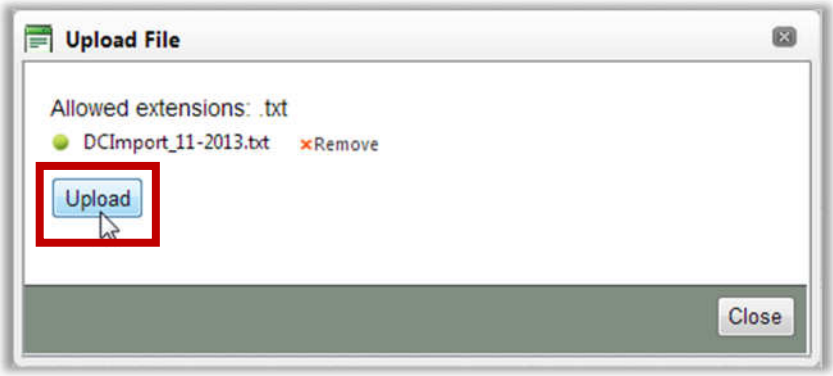
- Click Select .



In the Windows **Open** popup

- Use standard Windows navigation techniques to select a file.
- Click 

.



In the **Upload File** popup

- Click

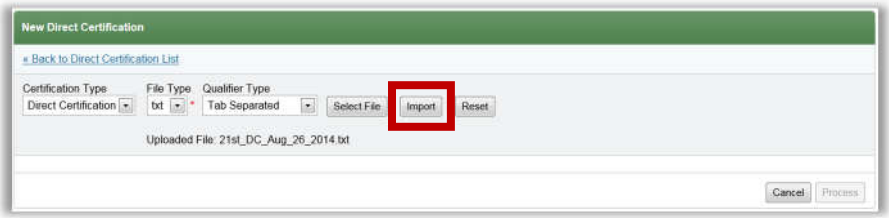
.

Note s

Pre-processing of the upload file has been completed when this popup is shown.

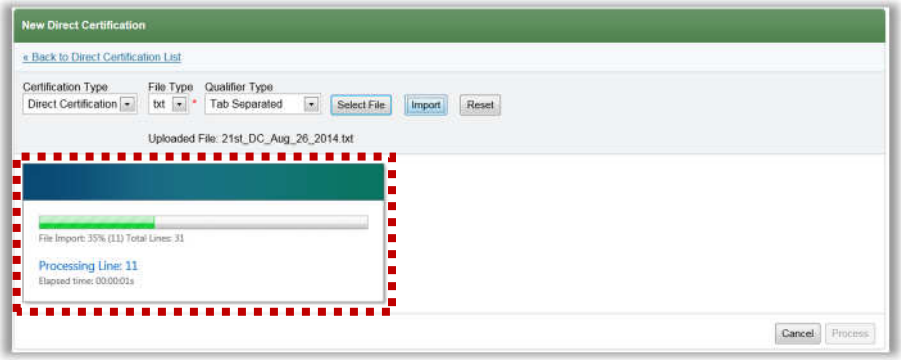
A "good" file with the correct format is indicated with a **green** bullet as shown in the first example.

A file with a **red** bullet as in the second example indicates that the file cannot be used.

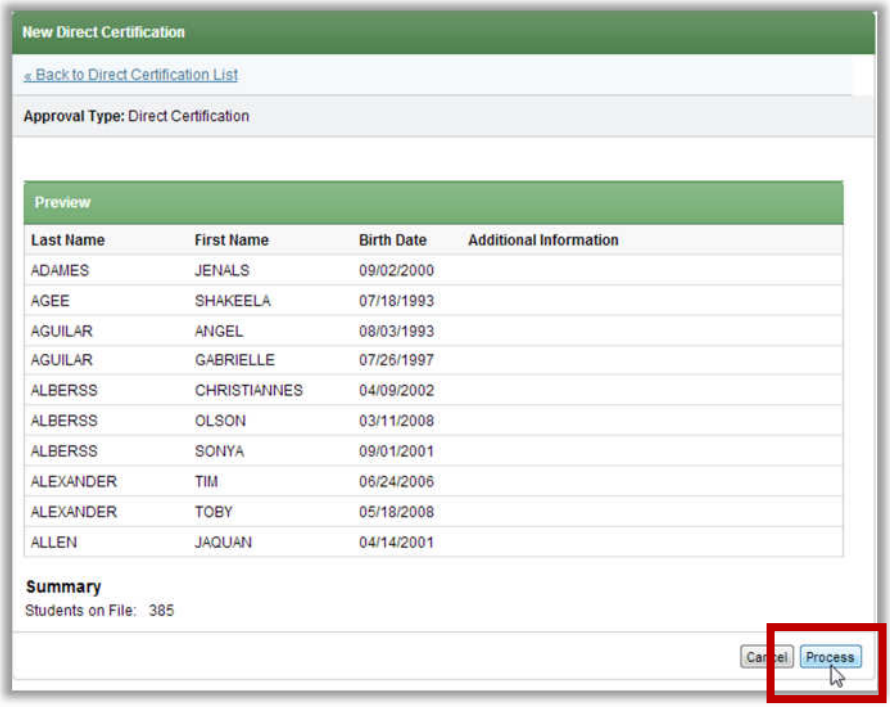


A message appears that displays the uploaded file name.

- Click **Import** .



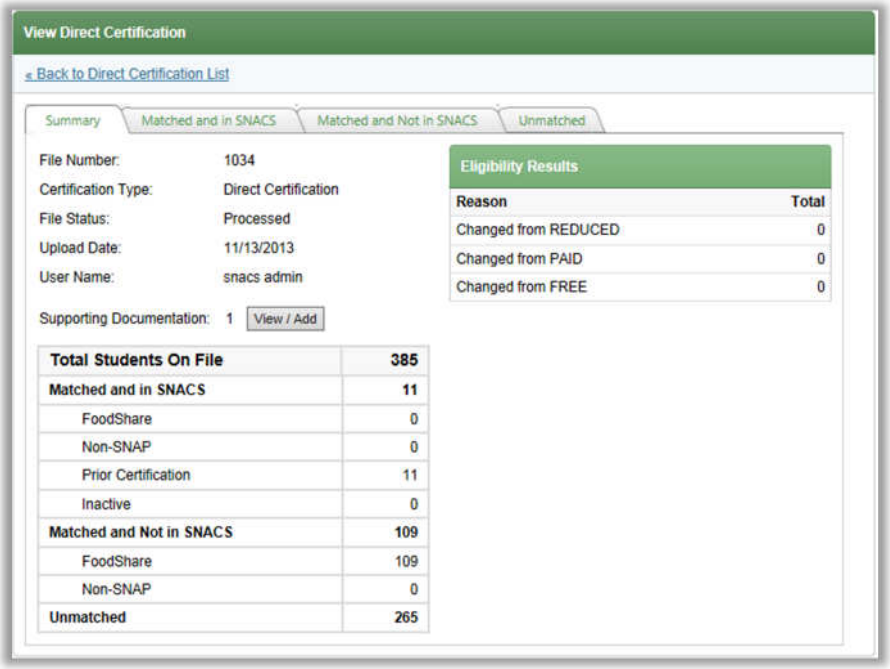
A progress indicator appears to display processing status.



When the import is complete, a **Preview** pane and **Summary** appear.

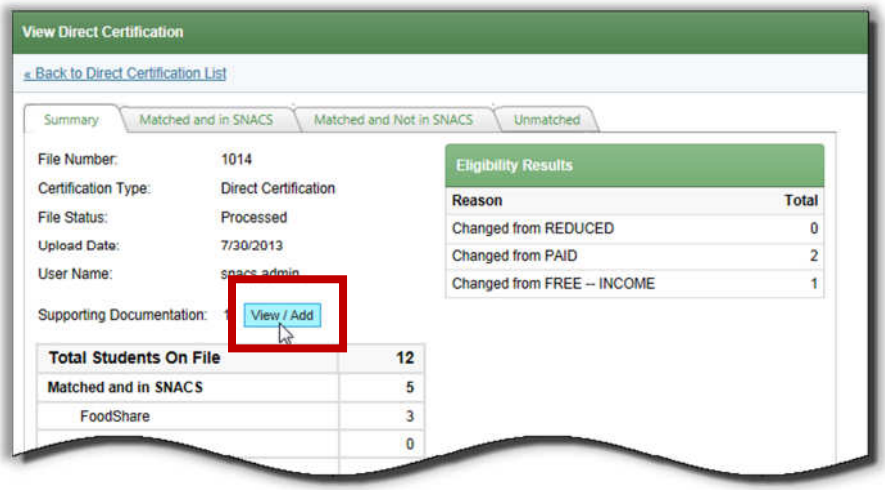
If the **Preview** looks correct:

- Click **Process** .

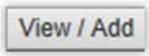


The **Summary** tab appears with processed file details.

Adding Supporting Documents

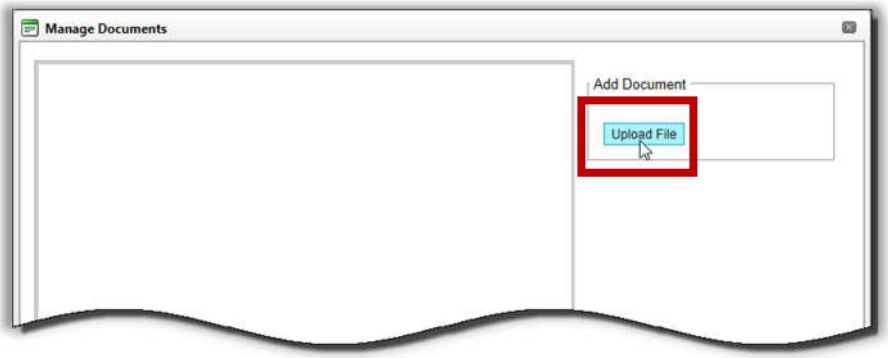


Display an approval for any type.

- Click  on the **Summary** tab.

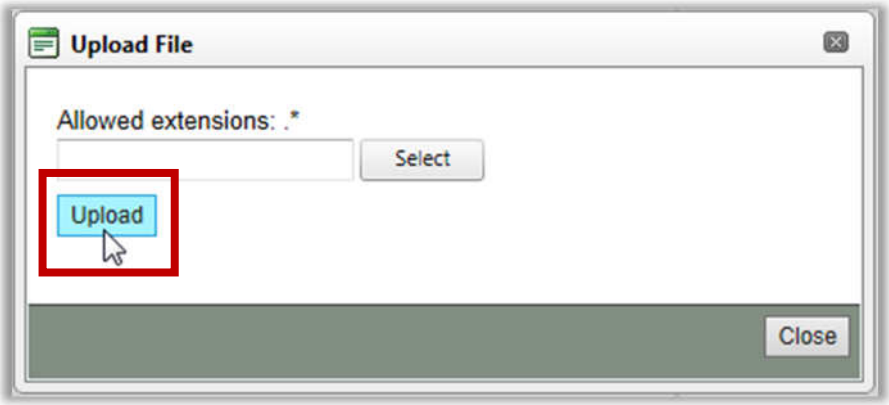
Note

For Direct Certification the uploaded file has automatically been added to the Supporting Documentation.



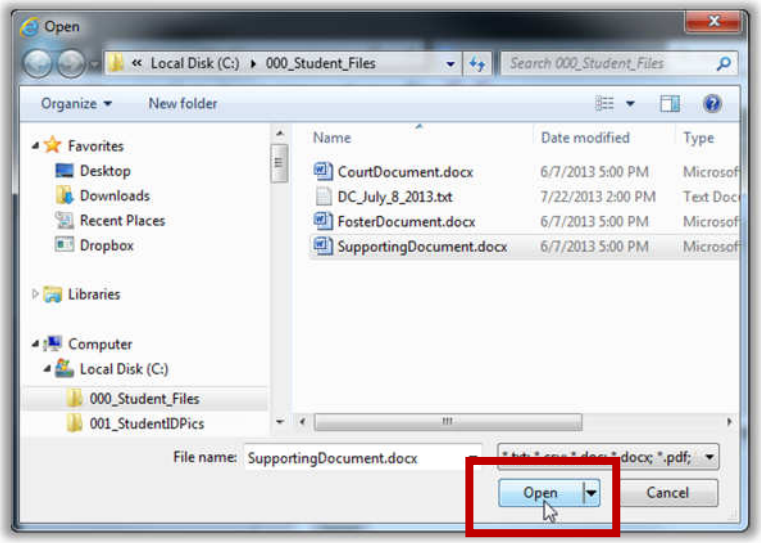
In the **Manage Documents** popup

- Click Upload File .



In the **Upload File** popup

- Click Upload .

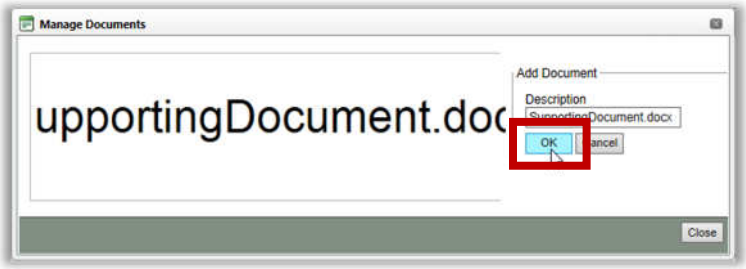


In the Windows **Open** popup

- Use standard Windows navigation techniques to select a file.
- Click Open .

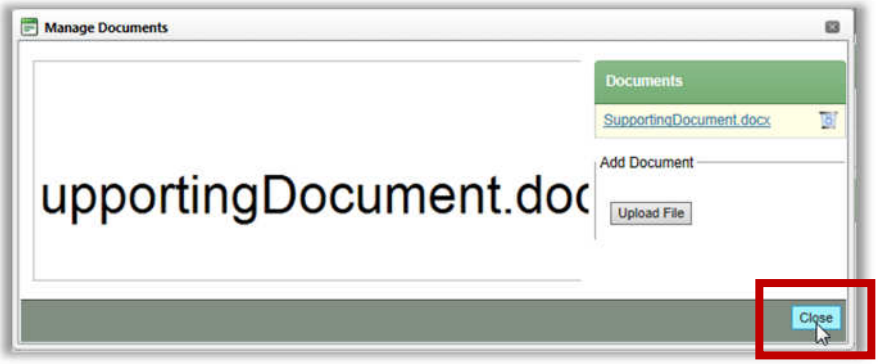
In the **Upload File** popup:

- Click Upload .



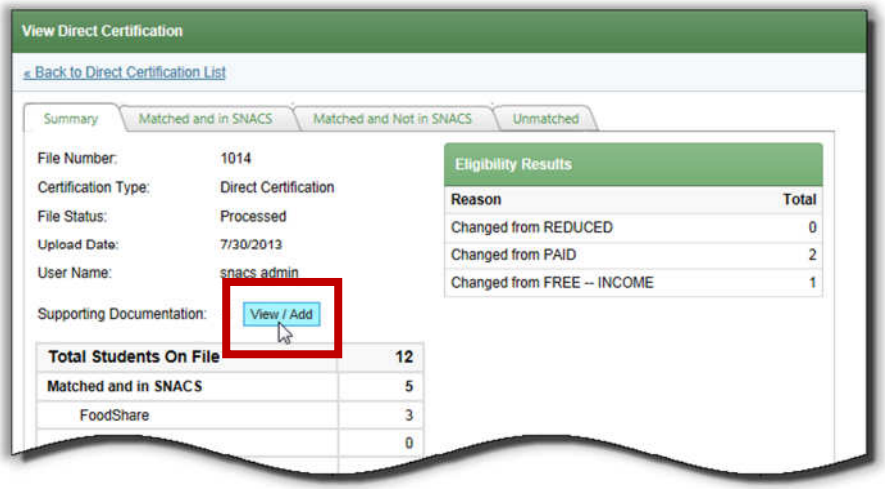
The uploaded document name appears in the **Add Document** group.

- Click OK .



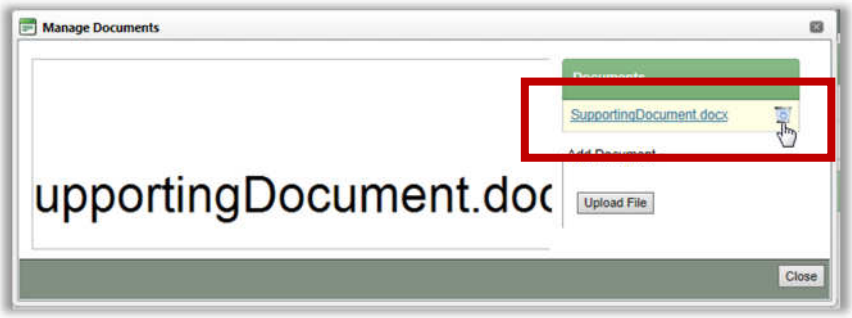
The document name appears in the **Documents** list.

Removing a Supporting Document



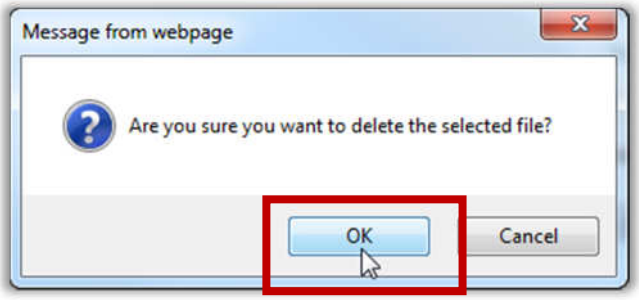
Display the **Summary** tab for a Direct Certification.

- Click View / Add .



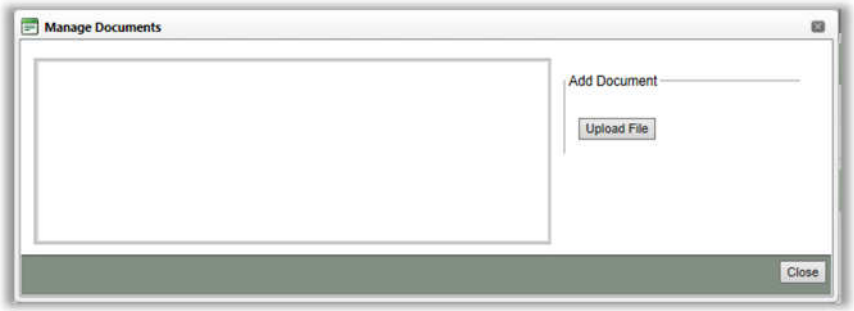
In the **Mange Documents** popup:

- Click **Delete** ( )in a document listing.



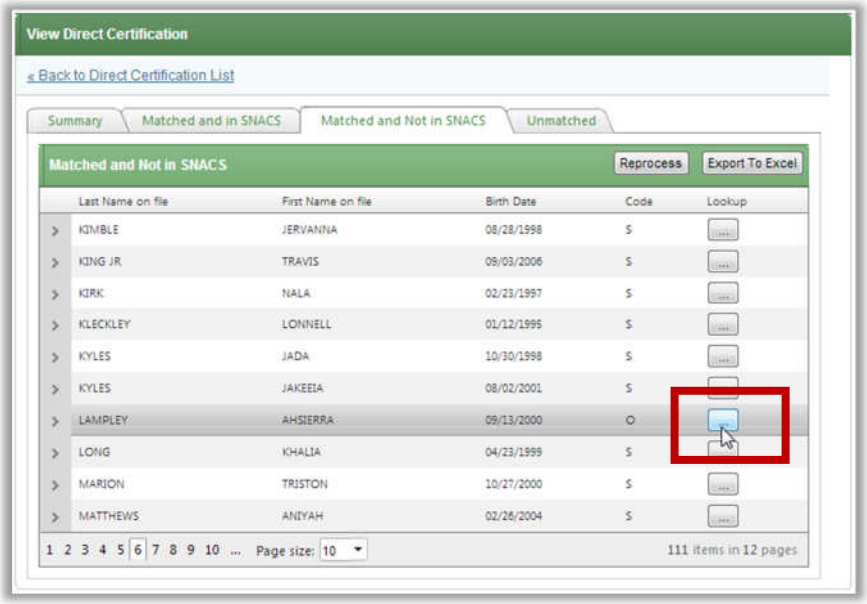
In the confirmation message

- Click OK .



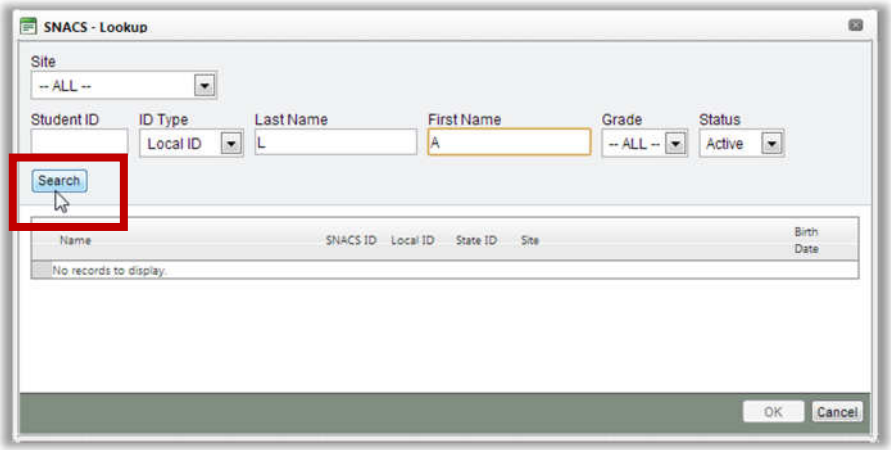
The document name is removed from the **Add Document** group.

Matching a Student Manually



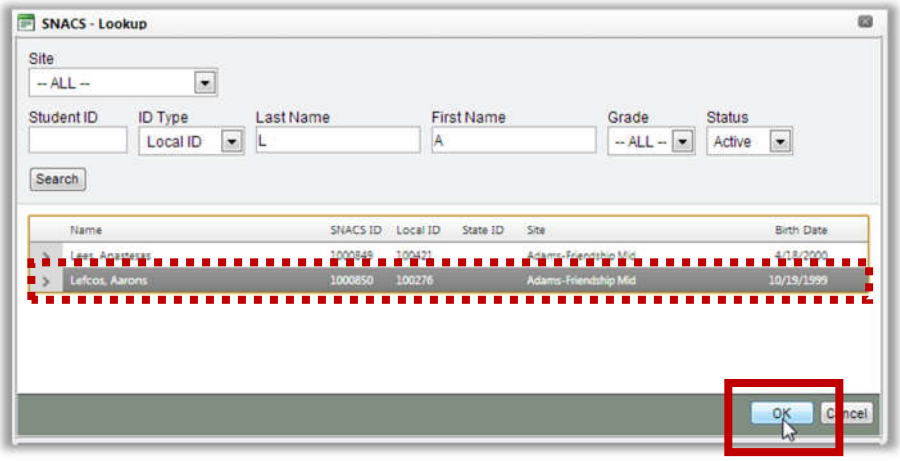
Display the **Matched and Not in SNACS** tab and

- Click **Lookup (** ...)in a student listing.



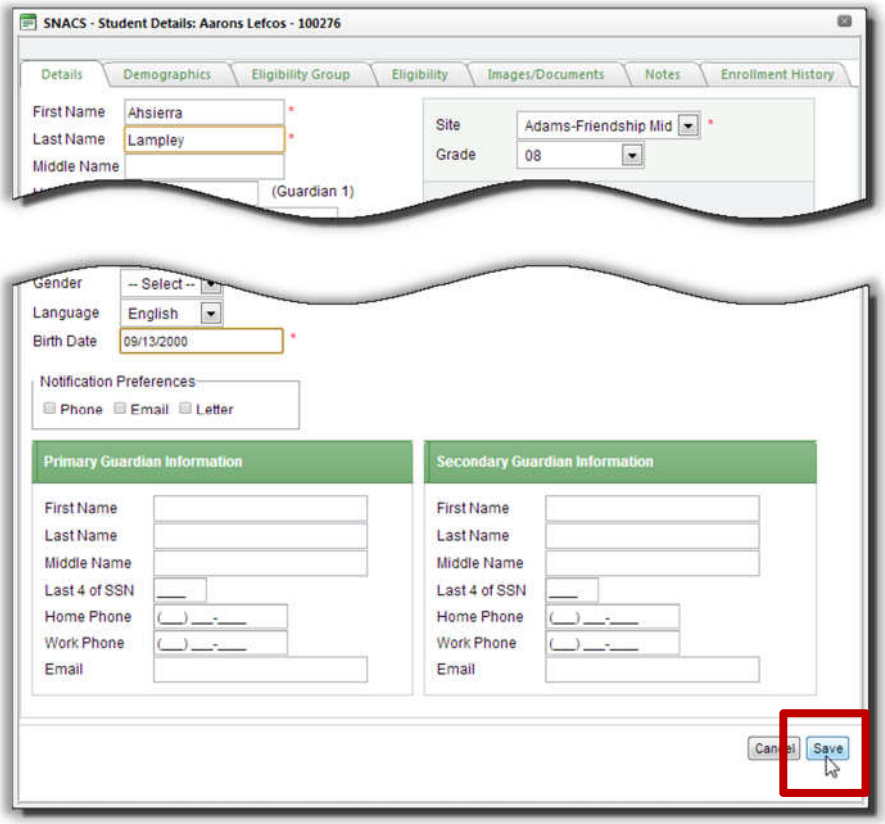
In the **SNACS - Lookup** popup

- Enter or select search criteria.
- Click Search .



In the list of students that match the selected criteria

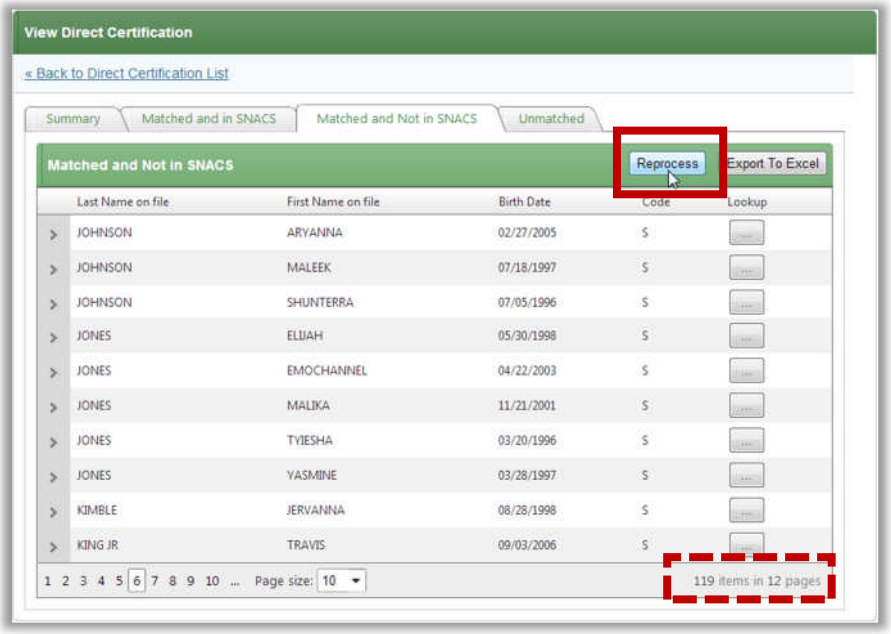
- Select a student.
- Click OK .



In the **Student Details** popup

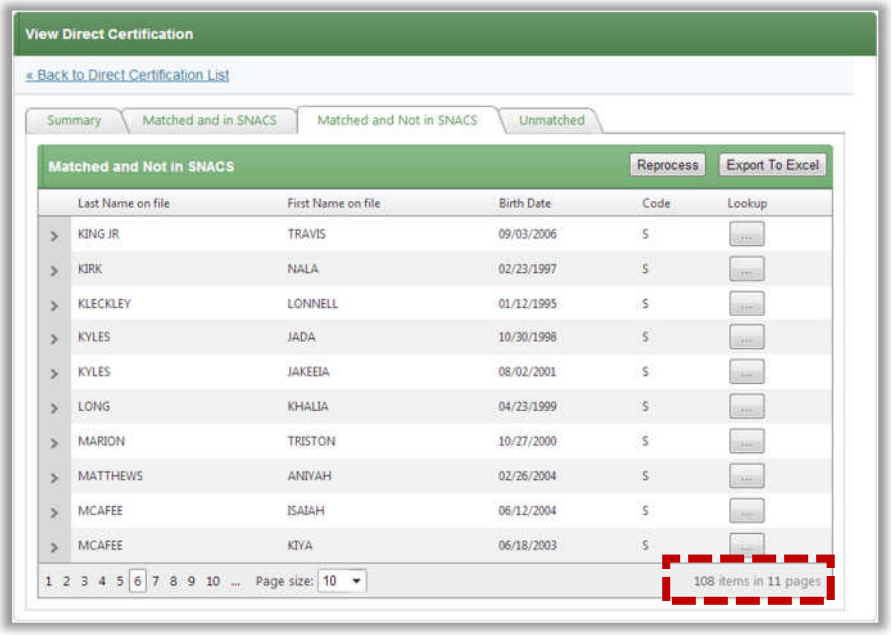
- Change name and birthdate information as needed on the **Details** and **Demographics** tabs.
- Click Save .

Reprocessing a File



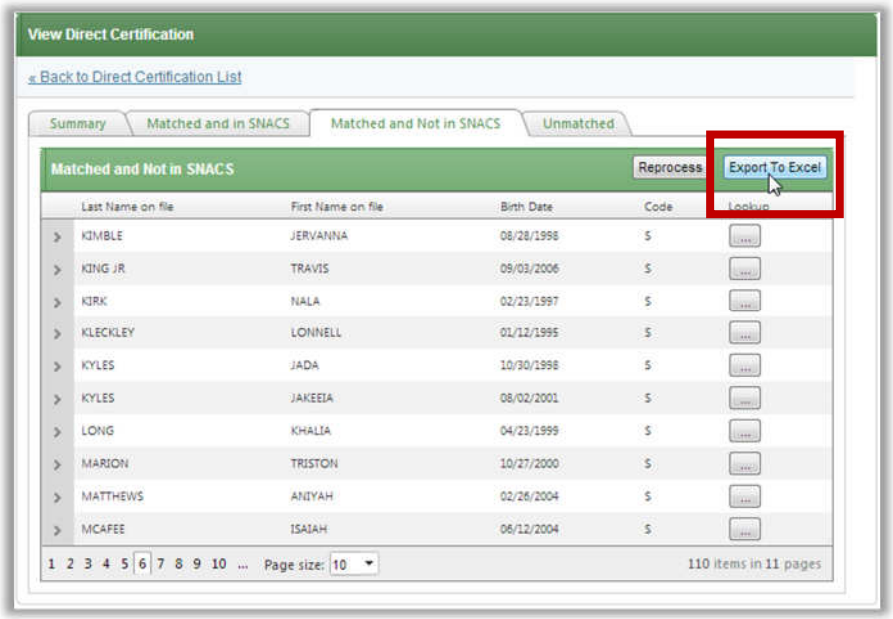
Display the **Matched and Not in SNACS** tab for a Direct Certification.

- Click **Reprocess** .



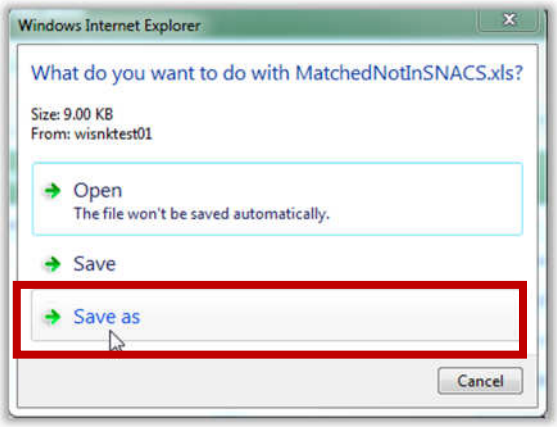
The number of matching students not in SNACS is updated when new matches are made through the reprocessing of the file.

Exporting a File



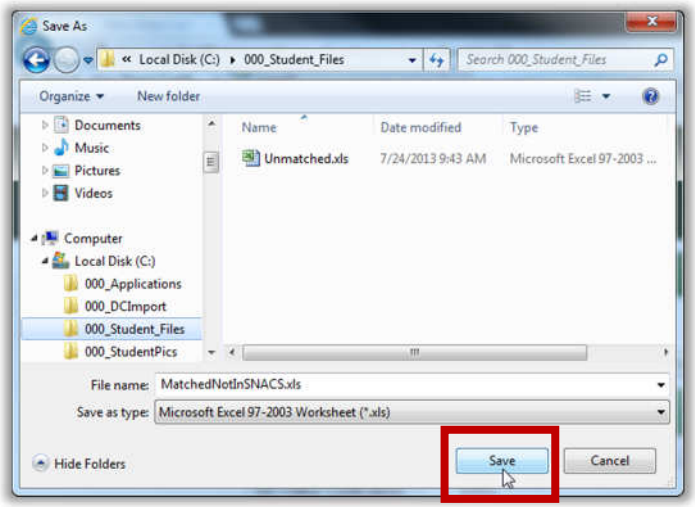
Display the **Matched and Not in SNACS** tab for a Direct Certification.

- Click **Export To Excel**.



In the list of file options

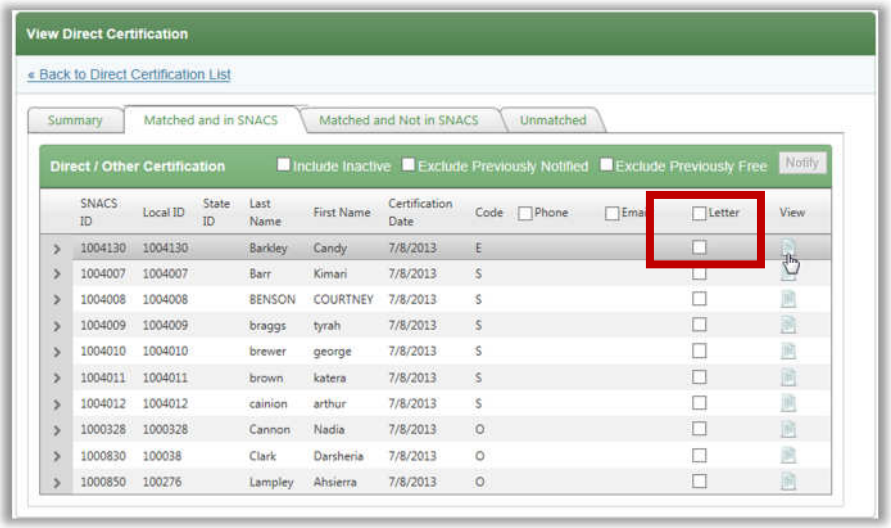
- Click **Save as** and enter a name for the file.



In the Windows **Save As** popup

- Use standard Windows navigation techniques to select a folder.
- Change the file name, if needed.
- Click **Save**.

Sending Notification

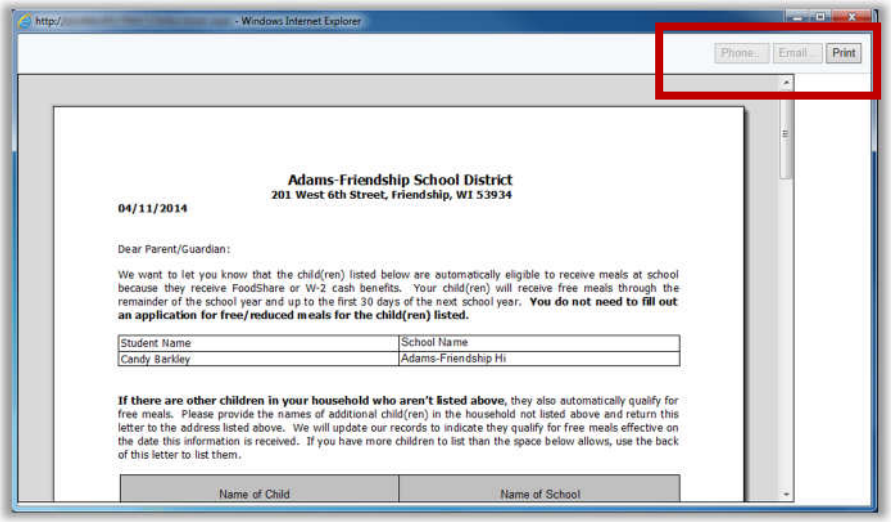


Display the **Matched and in SNACS** tab for a Certification file.

- Select **Include Inactive** to list both Active and Inactive students, if needed; by default Inactive students are not listed to eliminate printing an unnecessary letter.
- Select **Exclude Previously Free** to hide students that have a previous eligibility of "Free", if needed; this eliminates printing a letter for a student whose eligibility has not changed
- Select one or more available check boxes for the desired notification type and click Notify .

Notification check boxes are shown for each notification type available based on the contact information on the student record.

To view a single letter, click the icon under **View** to display a notification letter in the print window.

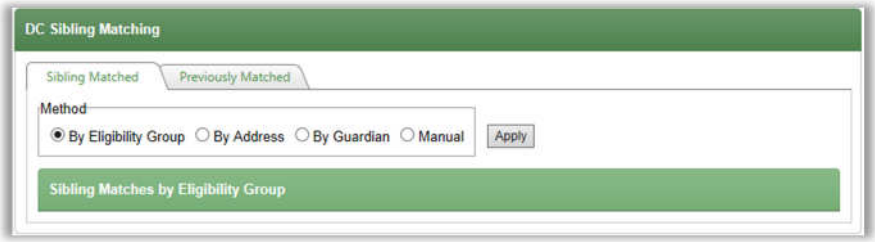


In the *Letter Viewer* window, three buttons appear on the print window toolbar. Buttons are available according to the notification selections and information included on a student record.

- Click the desired notification button on the window toolbar.

DC Sibling Matching

DC Sibling Matching is used to extend eligibility to siblings of students on a Direct Certification list.



By default on the *DC Sibling Matching* page

- **Method** is set to "By Eligibility Group."

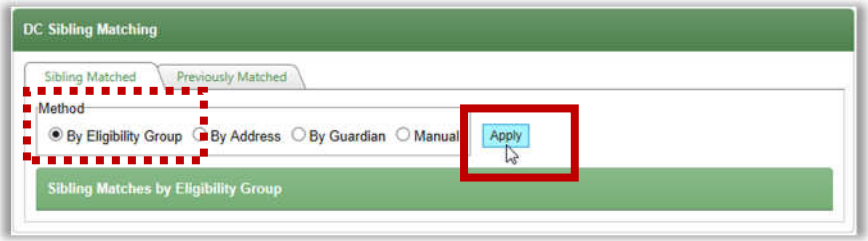
Page Functions

Field/Button	Description
Apply	Click to list all student records that match the selected method criteria.

Table 3.8 DC Sibling Matching Page Functions

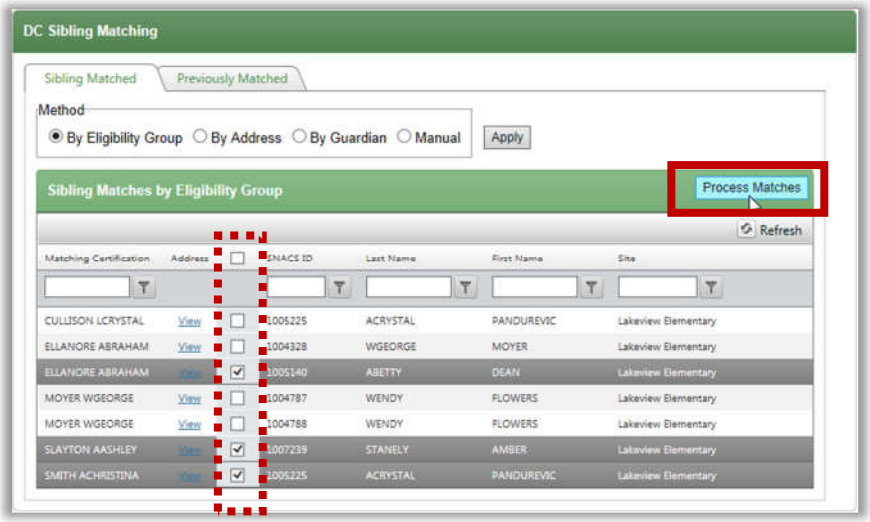
Matching By Eligibility Group

Matching By Eligibility Group matches students that have previously been in a common "group", such as children previously on an application together.



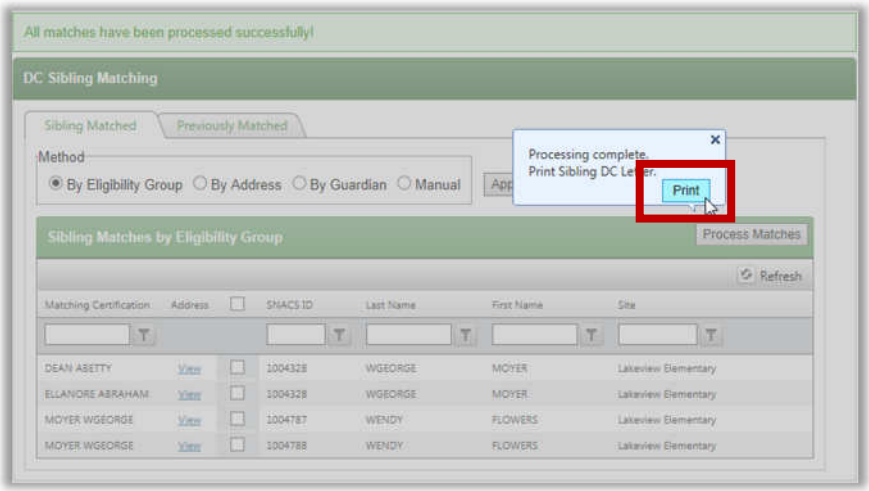
On the **Sibling Matched** tab

- Click "By Eligibility Group".
- Click Apply .



In **Sibling Matches by Eligibility Group**

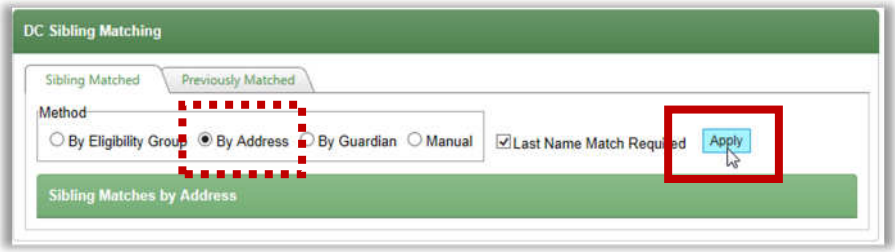
- Click View to display the address for each student, if needed.
- If appropriate, select two or more options in the student listing(s) to process as a match, or select the option in the list header to select all listings.
- Click Process Matches .



The **Processing complete** popup appears.

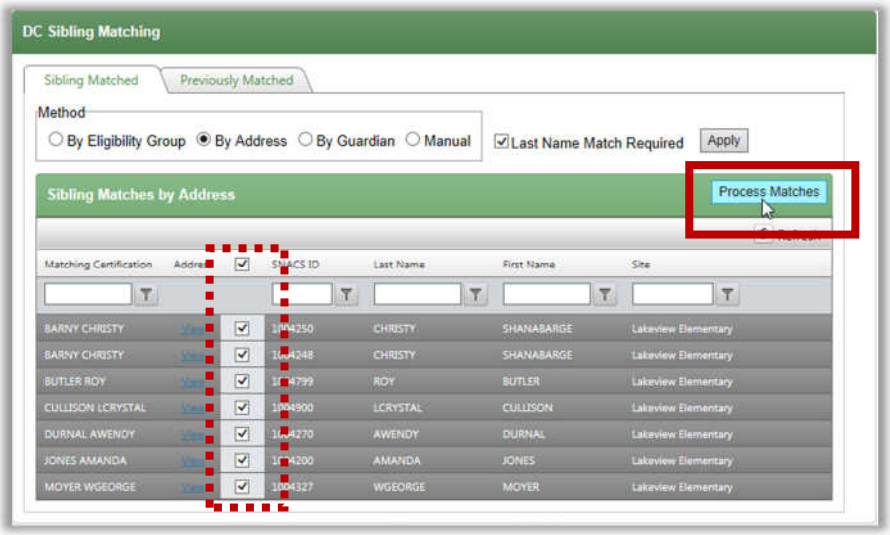
- Click Print to print notification letters for the matched students.

Matching by Address



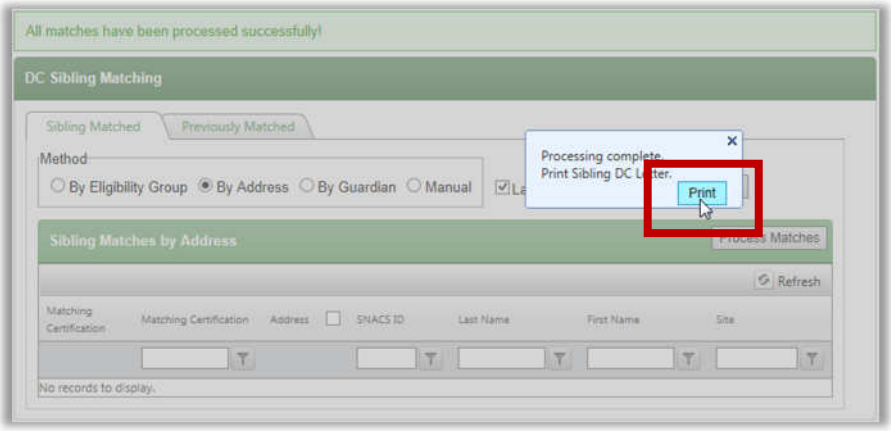
On the **Sibling Matched** tab

- Click "By Address."
- Clear **Last Name Match Required**, if needed.
- Click Apply .



In the **Sibling Matches by Address** group

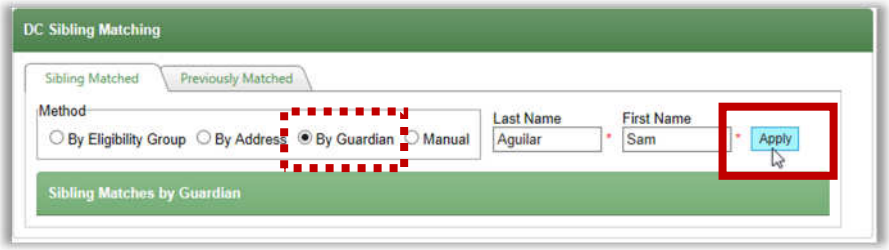
- If appropriate, select one or more options in the student listing(s) to process as a match, or select the option in the list header to select all listings.
- Click Process Matches .



The **Processing complete** popup appears.

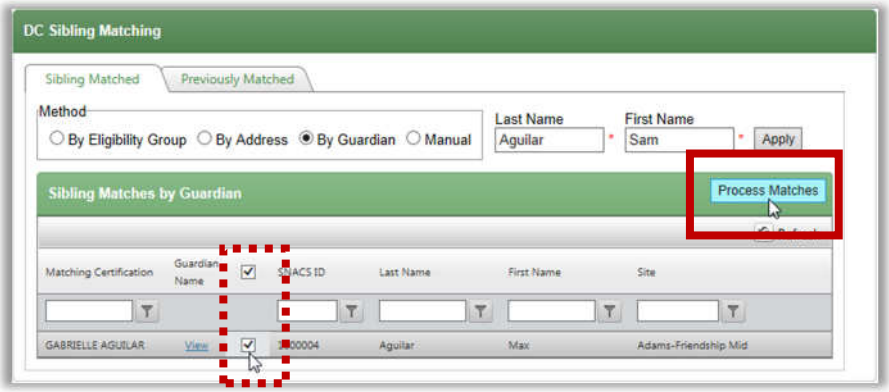
- Click Print to print notification letters for the matched students.

Matching by Guardian



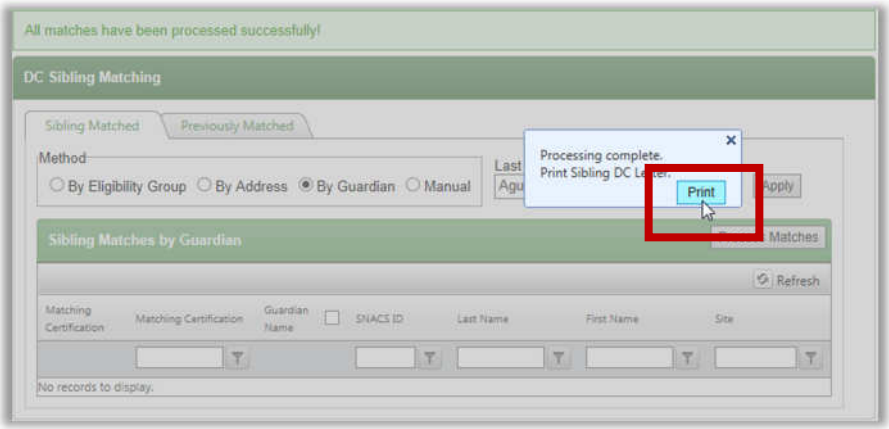
On the **Sibling Matched** tab

- Click "By Guardian."
- Enter a **Last Name** and **First Name**.
- Click Apply .



In the **Sibling Matches by Guardian** group

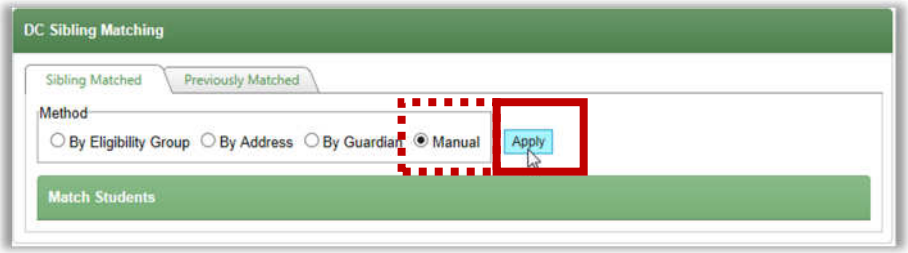
- Select the option in the student listing(s) to process as a match.
- Click Process Matches .



The **Processing complete** popup appears.

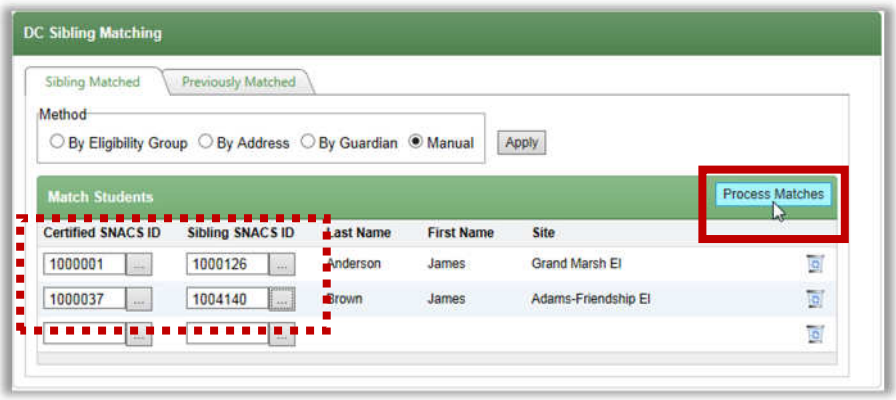
- Click Print to print notification letters for the matched students.

Matching Manually



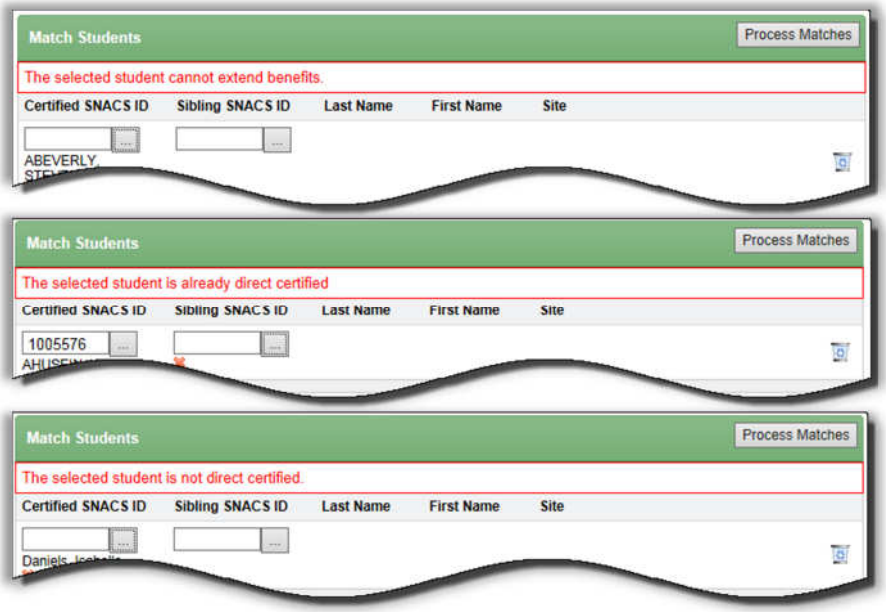
On the **Sibling Matched** tab

- Click **Manual**.
- Click Apply .

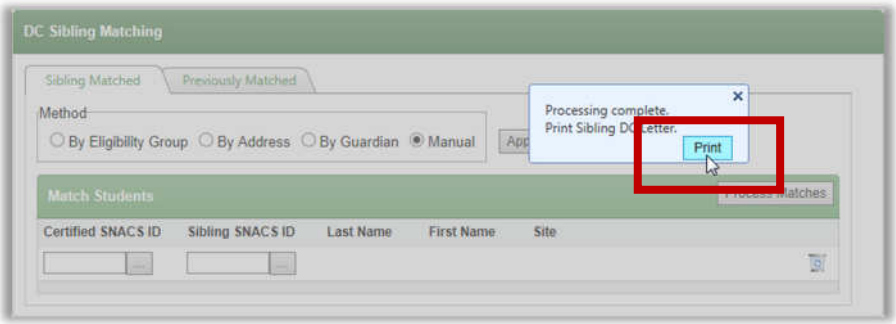


In the **Match Students** group

- Enter the SNACS ID for a Approved student in the Approved SNACS ID field or click ... to lookup a student.
- Enter the SNACS ID for a sibling in the Sibling SNACS ID field or click ... to lookup a student.



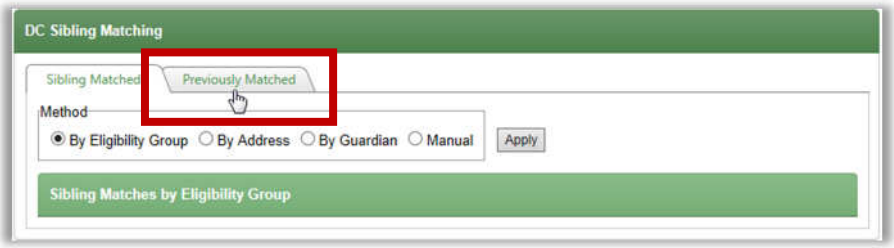
- Continue entering matches as needed; error messages appear when a match cannot be made; you must remove the listing before continuing.
- Click Process Matches .



The **Processing complete** popup appears.

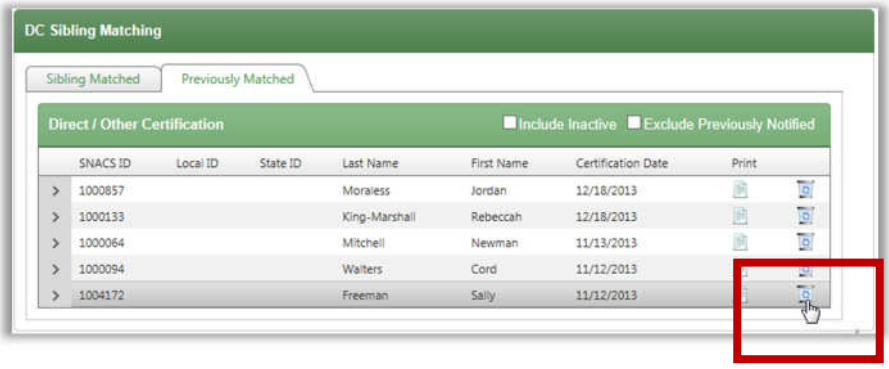
- Click to print notification letters for the matched students.

Removing a Student from Certification



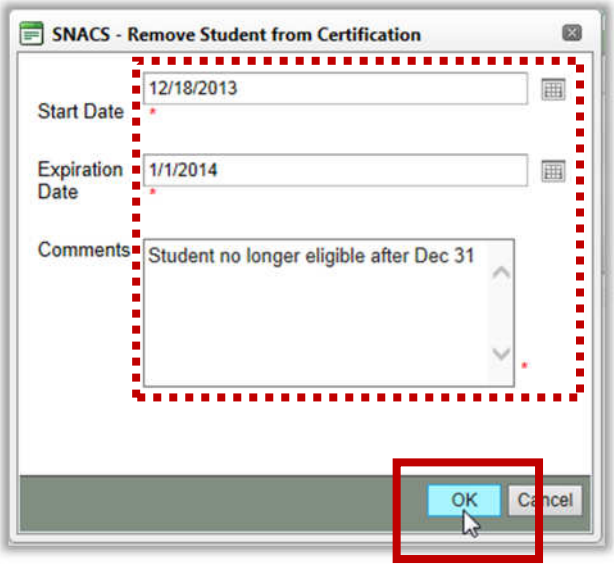
On the **DC Sibling Matching** page

- Click the **Previously Matched** tab.



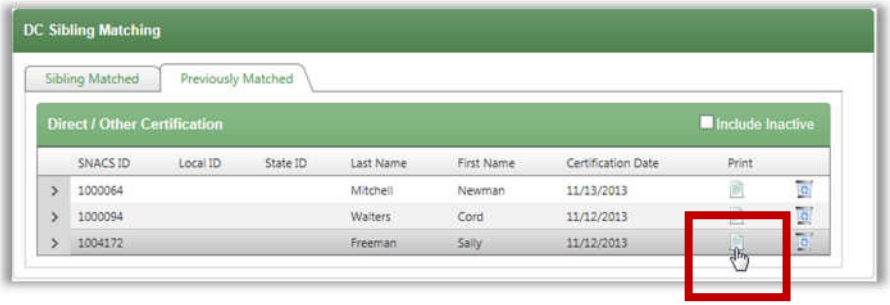
In the **Direct / Other Certification** group, to remove a student from certification

- Click **Delete** ( ) in a student listing.



In the **Remove Student from Certification** popup

- Select a **Start Date**, if needed; otherwise the current date is used.
- Select an **Expiration Date**, if needed; otherwise the school year end date is used.
- Enter comment text in **Comments**.
- Click OK .



To print a notification letter for a sibling-matched student

- Select **Include Inactive** to also list inactive students that were sibling matched, if needed.
- Click **Print** ( ) in a student listing.

Message appears to confirm printing notification letter.

- Click OK .

In the *Print* window

- Click Print .

End of Chapter

Chapter 4: Letter Management

In this chapter you will learn how to

- ✓ Display a list of Letter Template types.
- ✓ Display and update a Letter Template.
- ✓ Add or remove data fields in a Letter Template.
- ✓ Add or remove columns in a table in a Letter Template.
- ✓ Save updates to the current Letter Template or save to a new (copy) Letter Template.
- ✓ Set a Letter Template as the Active Letter Template.

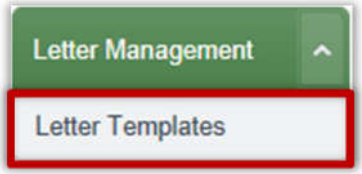
Letter Management at a Glance

Menu Selection	Description
Letter Templates	Display Standard Letter Templates; save updates to the current Letter Template or save to a new file; set the Active Letter Template for a letter type.

Table 4.1 Letter Management Menu Selections

Note
Categories and menu selections to which you have access in SNACS are those appropriate for your assigned role(s). When you access the **Letter Management** menu, you may see a subset of the menu selections listed above.

Letter Templates



Letter Templates offers 8 (eight) categories of letter templates. The letters can be edited and sent to families via mail or direct hand-out. Template letters include:

- Direct Certification
- Notification of Eligibility
- Other Certification Lists
- Other Change in Eligibility
- Review Change in Eligibility
- Verification Follow-Up
- Verification Results Notice
- Verification Selection Notice

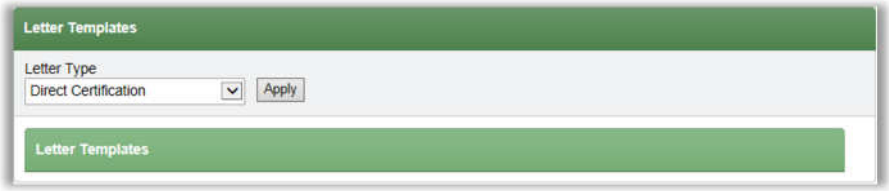
Letter Templates provided by DPI are identified as "Standard" templates. Standard Letter Templates are updated only by DPI and cannot be removed. A custom Letter Template is created by displaying a Standard Letter Template and saving it to a new file. Custom Letter Templates can be updated and removed, as needed.

Note: If DPI updates a Standard Letter Template, the changes will not be made on any Custom Letter Templates created by the SFA.

A single Letter Template in a Letter Type is designated as the "Active" Letter Template. This template is used by a notification function when you choose to print or send notification letters or emails. The Letter Template used by a notification function corresponds with the notification function.

Each Letter Template can include free-form text, data fields and **one** table with one or more table fields. A data/table field is a special control that tells SNACS to include information in the letter from the SNACS database when the letter is sent to the printer or the email is created.

Letters are generated from the Active Letter Template when a notification function is used, such as **Notify** on the **Applications** menu, or clicking **Notify** on the *Batch Summary* page after selecting applications in the **Application Summary** list.



By default on the *Letter Templates* page

- **Letter Type** is set to "Direct Certification."
- No letter templates are listed.

Page Functions

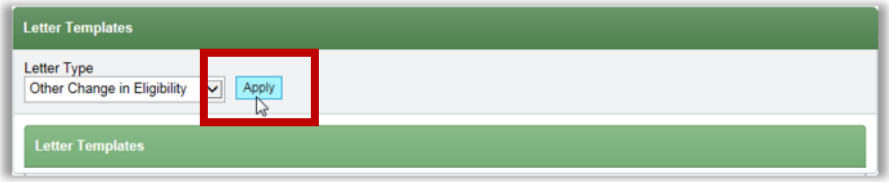
Field/Button	Description
Apply	Click to list all letter templates for the selected **Letter Type**.

Table 4.2 Letter Templates Page Functions

Displaying All Templates for a Letter Type

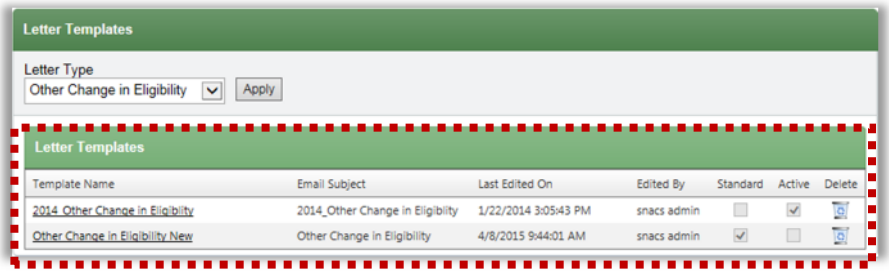
On the *Letter Templates* page

- Select a letter type.



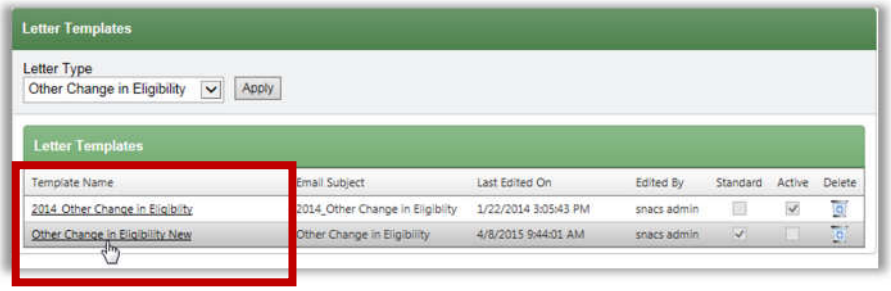
On the *Letter Templates* page

- Click Apply .



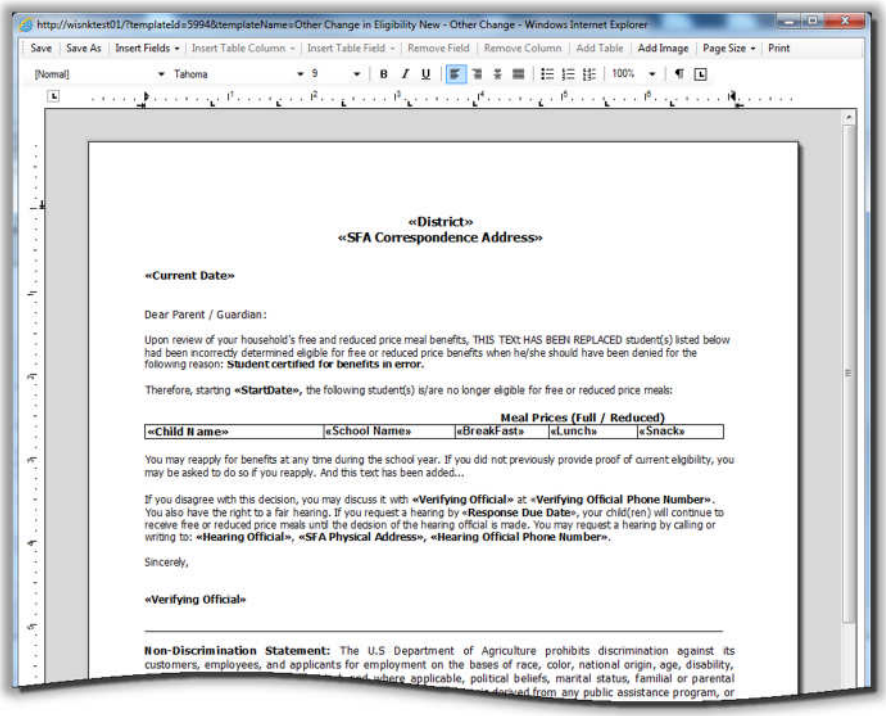
All available templates for the selected letter type are shown in the **Letter Templates** list.

Viewing a Letter Template



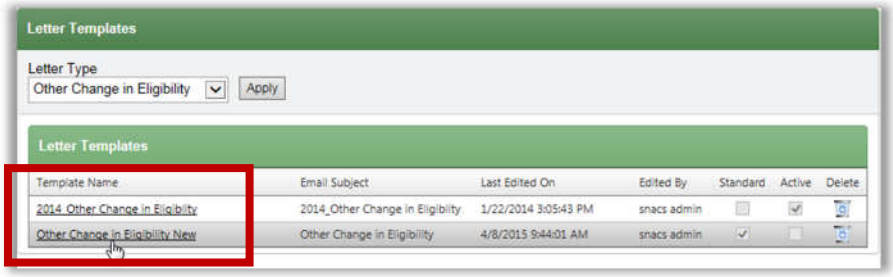
On the *Letter Templates* page

- Select a **Letter Type** and click Apply .
- Click a **Template Name** link in the **Letter Templates** list.



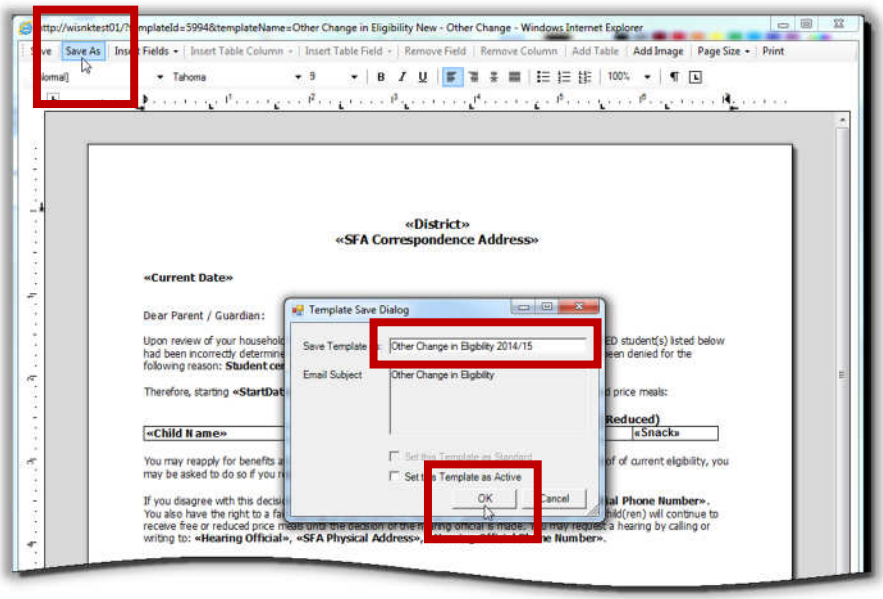
The letter template appears in the *Letter Template* window.

Adding a Custom Letter Template



On the *Letter Templates* page

- Click a **Template Name** link in the **Letter Templates** list.

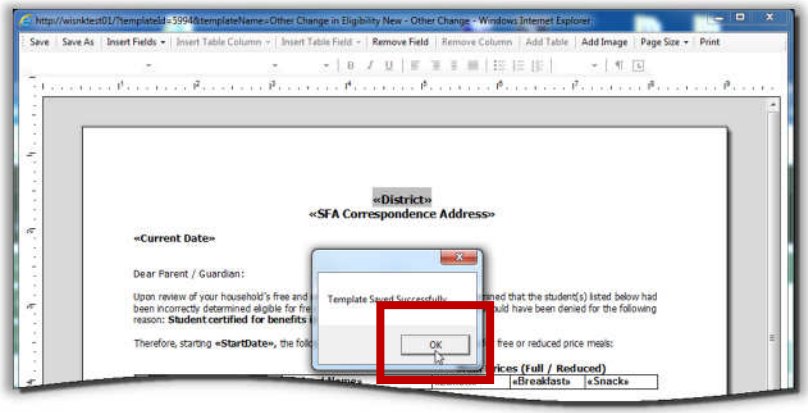


In the *Template Letter* window

- Click Save As .

In the *Template Save* popup

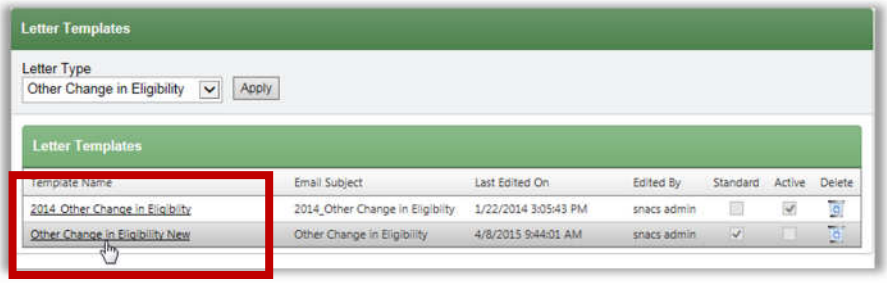
- In **Save Template as**, enter a name for the new template.
- Click OK .



In the *Successful Save* message popup

- Click OK .
- Click **Close** X on *the Letter Template* window.

Editing a Letter Template



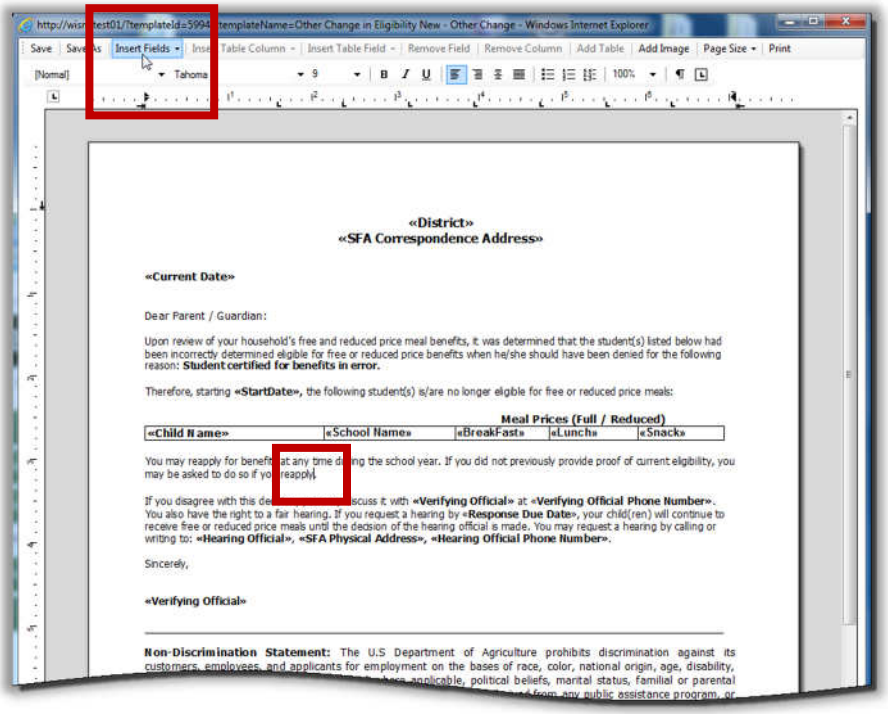
On the *Letter Templates* page

- Display a list of letter templates.
- Click a **Template Name** link.

Working with Data Fields

Data fields are placeholders for text that is retrieved from the SNACS database when a letter is sent to the printer or an email is created. A data field appears in a letter template for text that changes from letter to letter, such as the student name, or provides information which changes on a daily basis, such as the current date. Data fields are surrounded by
"**<< >>**" (angle brackets.

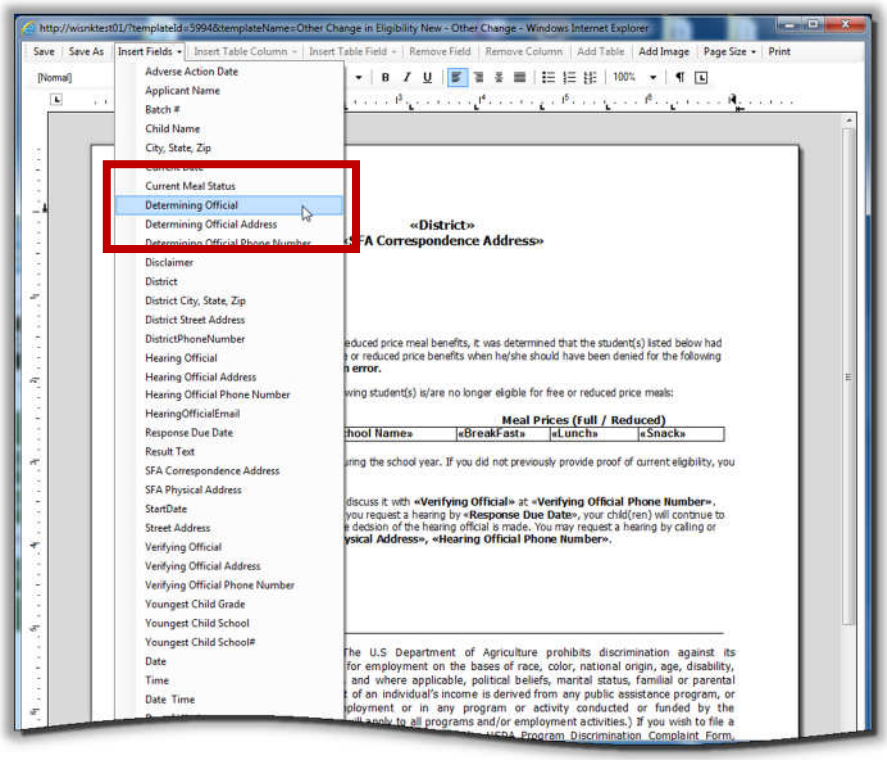
To Add a Data Field



In the *Letter Template* window

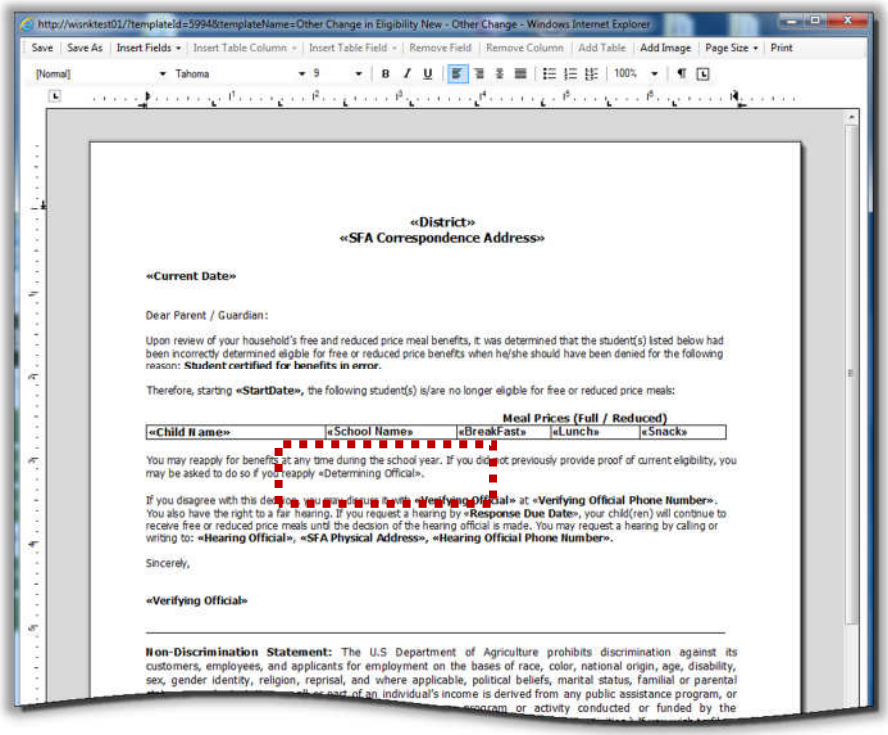
- Place the cursor where the new data field is to appear.
- Click

on the window toolbar.



On the **Insert Fields** list

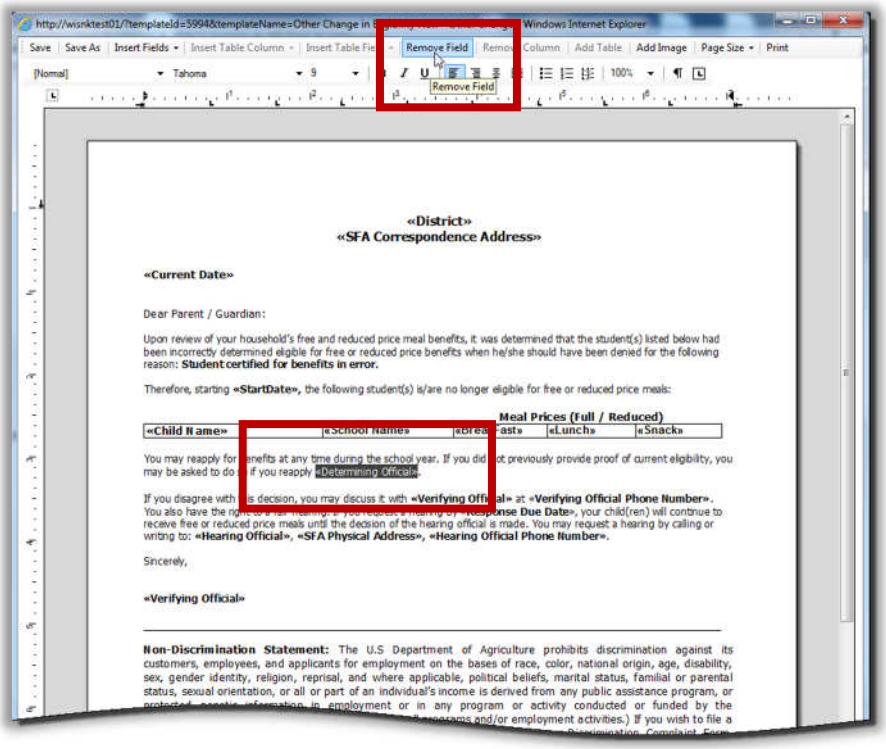
- Click a data field name.



The new data field appears in the template letter surrounded with "<< >>" (angle brackets).

When the letter is printed, the data field is replaced with data from the SNACS database.

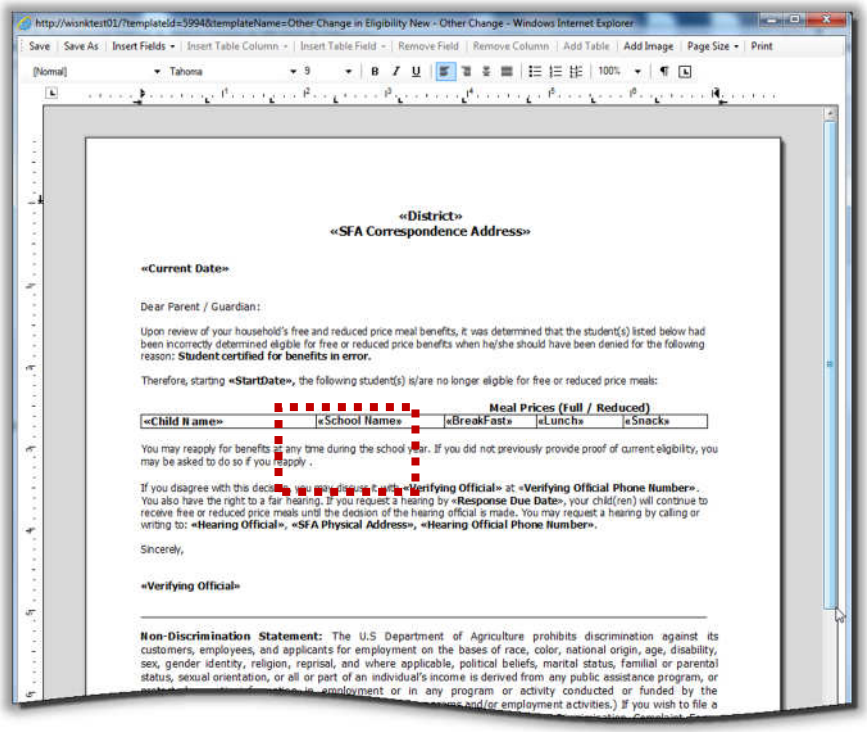
To remove a Data Field



In the *Letter Template* window

- Highlight a data field.
- Click Remove Field .

Caution!
Using **Delete** on your keyboard only deletes the text in the window. ***It does not remove the field from the letter!*** *Simply deleting the text from the window can cause issues with the Letter Template.*



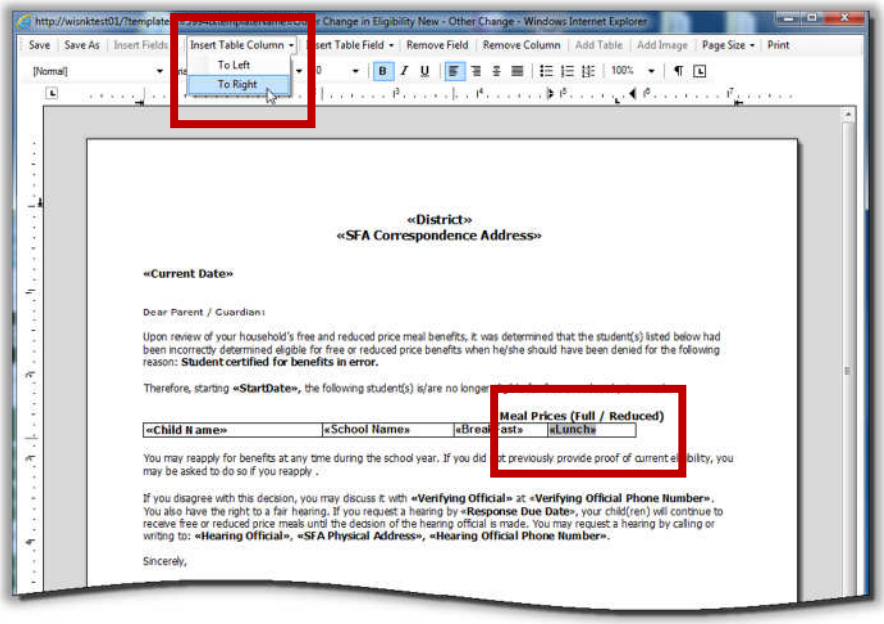
The data field is removed.

Be sure to remove any additional text that is not needed.

Working with Tables

Each of the Standard letters includes one table. **Only one table is allowed on a Letter Template.** Table columns can be resized by dragging the column separators with the mouse. Clicking inside the table activates the four table buttons on the template window toolbar.

To Add a Column to a Table

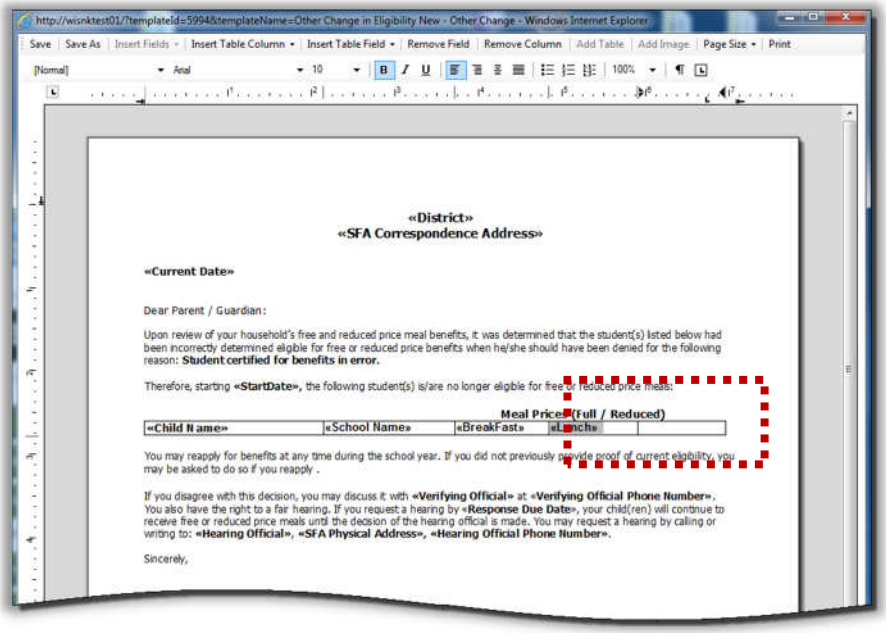


In the *Letter Template* window

- Place the cursor in a column where the new column is to appear.
- Click

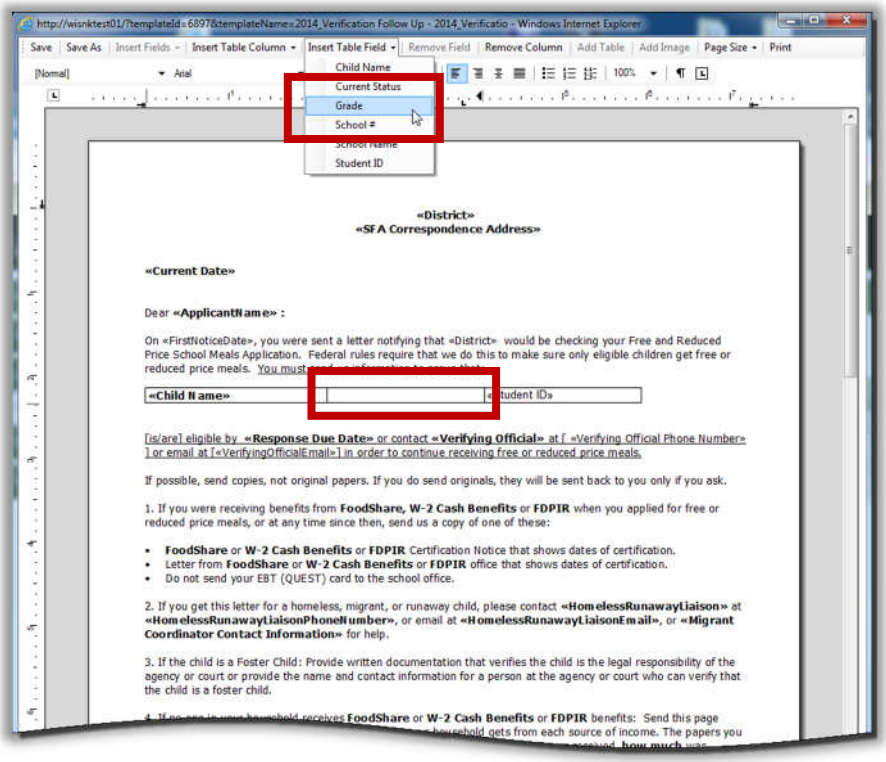
and choose where the new column is to appear.

Note
Table fields are fixed in length. New table fields cannot be added if the addition causes the table to wrap or extend beyond the margins. Resize the existing fields first, then adjust the size as needed.

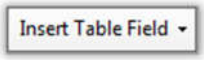


The new column appears in the table.

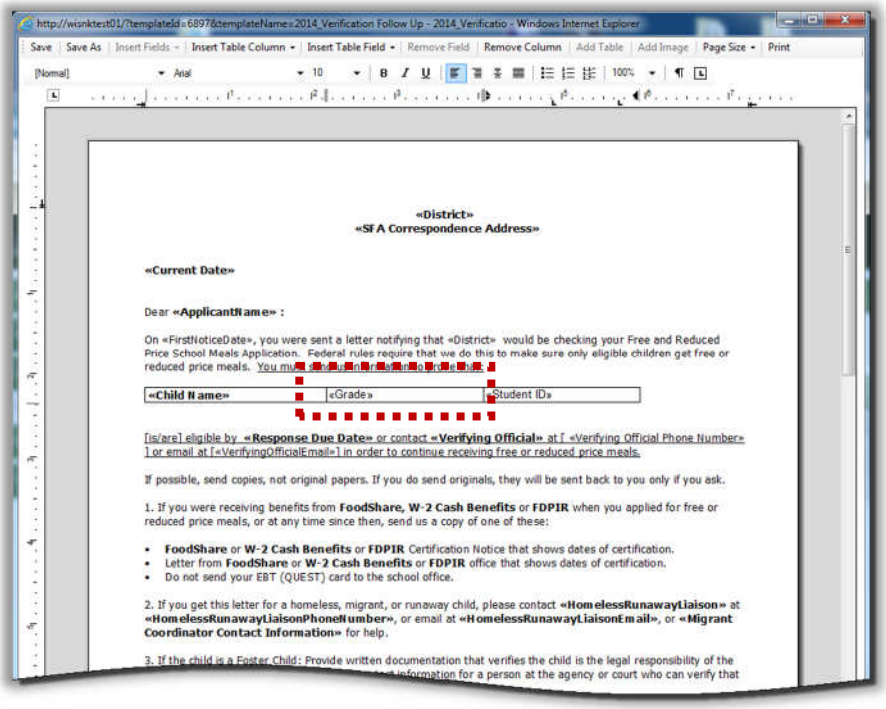
To Add a Data Field to a Table Column



In the *Letter Template* window

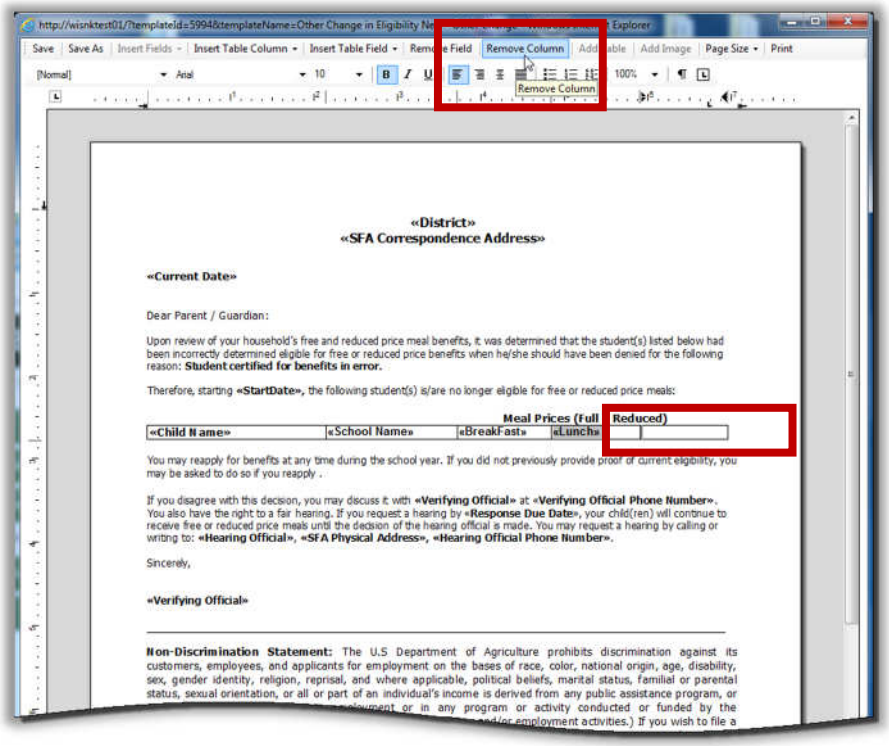
- Place the cursor in the table column where the new data field is to appear.
- Click 

and choose the table field.



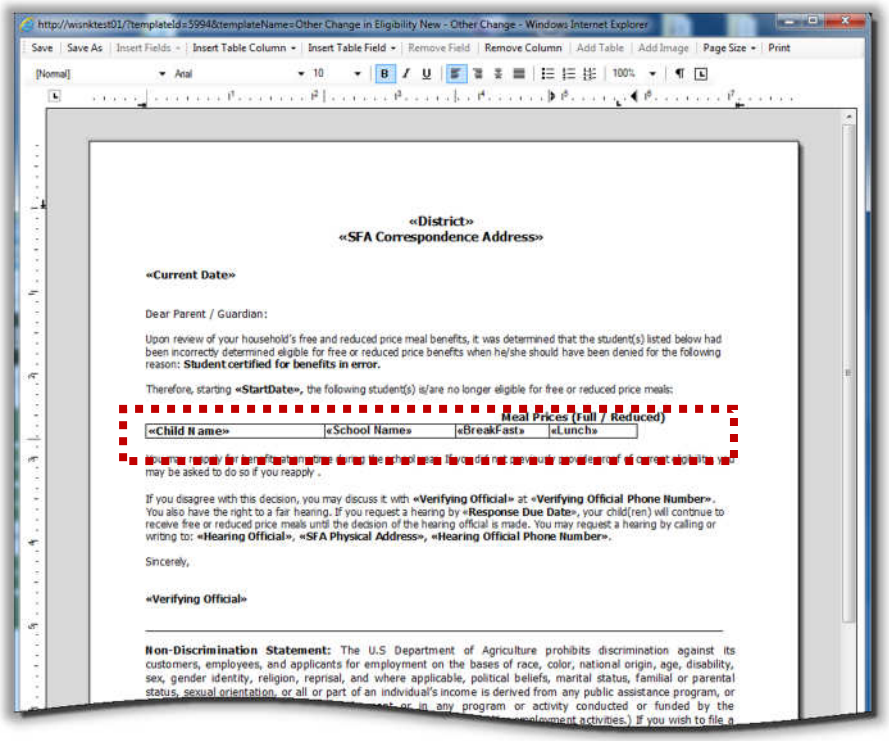
The new data field appears in the table column surrounded with "<< >>" (angle brackets).

To remove a Table Column



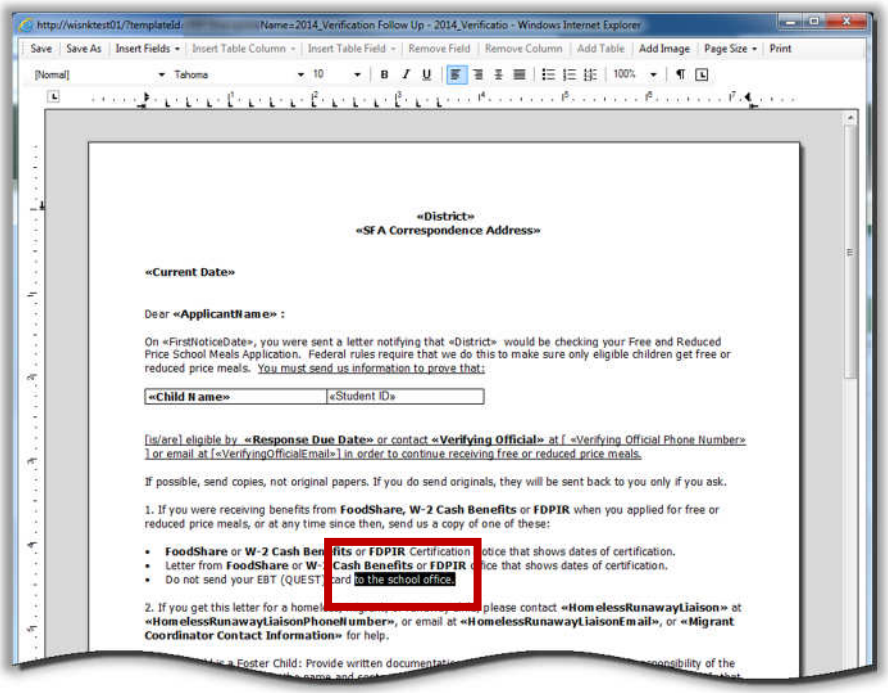
In the *Letter Template* window

- Place the cursor in the table column to be removed.
- Click **Remove Column** .



The column is removed and remaining columns, if any, are wrapped to the left.

To Change Existing Text

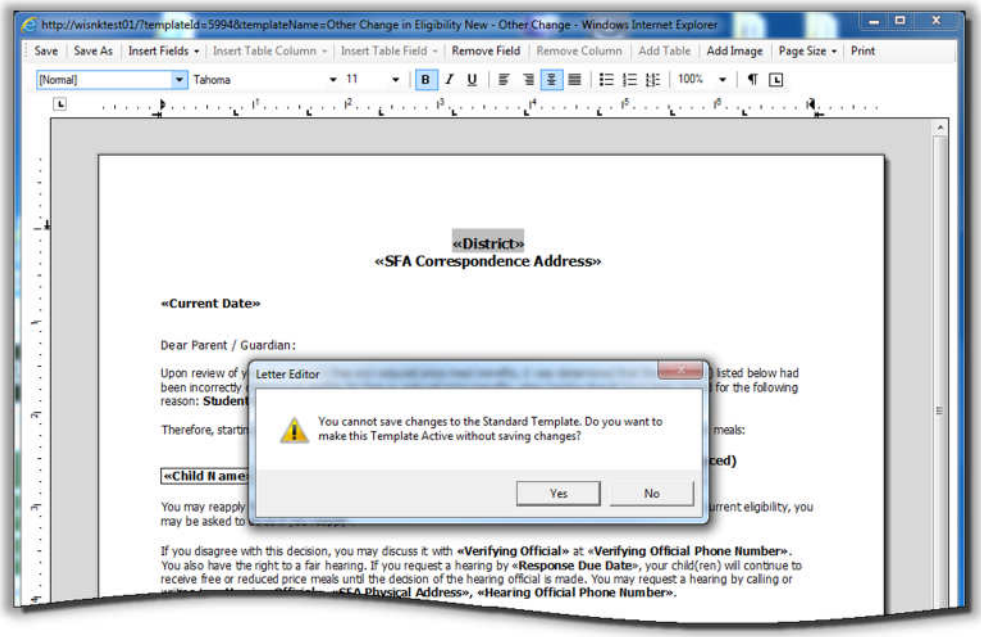


In the *Letter Template* window

- Add, remove or change existing text as you would in a word processing application, such as MS Word using the keyboard.

Saving Updates to a Standard Letter Template

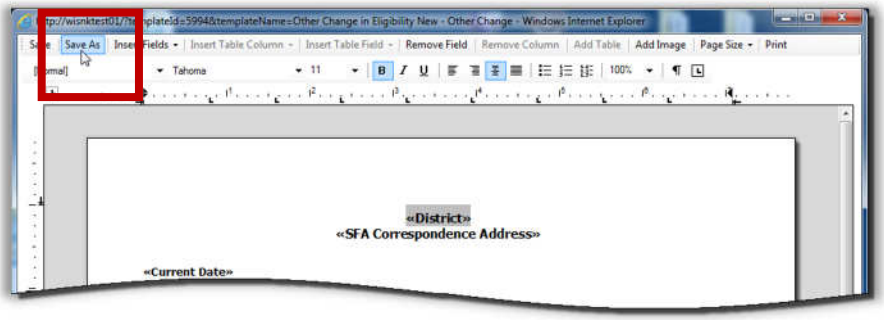
A Standard Letter Template cannot have changes saved directly to the template. A message appears to alert you.



In this situation (you have made changes to the Standard Letter Template for a Letter Type), you could

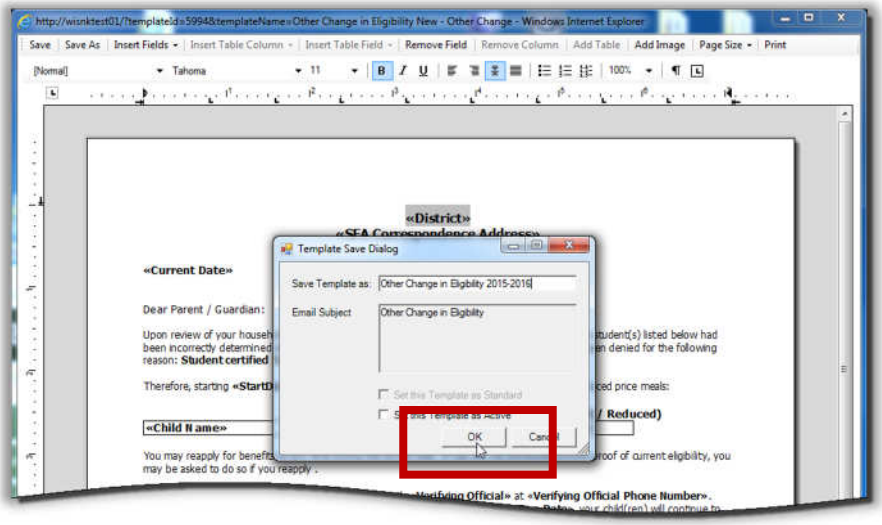
- Click **No** to then click **Save As** and save your changes to a new Custom Letter Template.
- Click **Yes** to discard your changes and change the Standard Template to the Active Template

Saving a Standard Letter Template to a New File



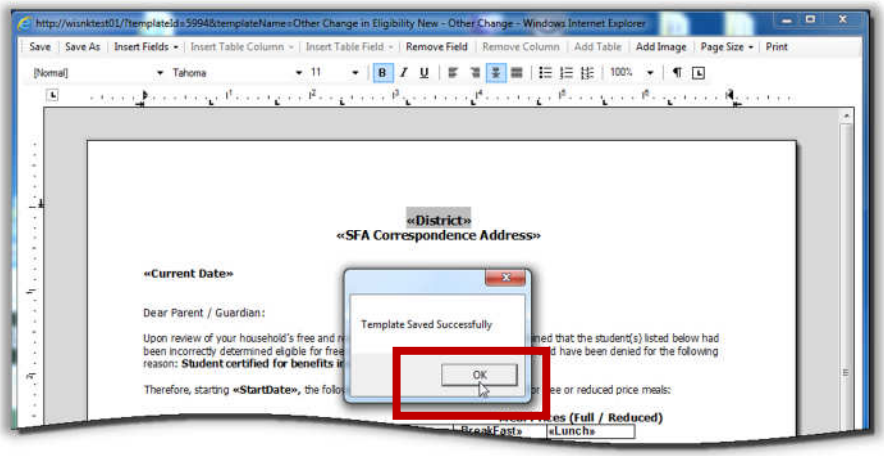
In the *Letter Template* window

- Click **Save As** on the window toolbar.



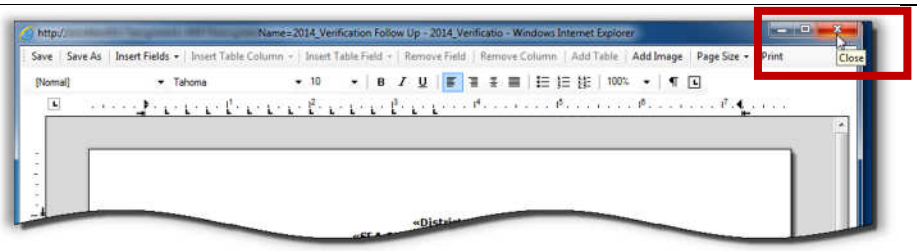
In the popup

- Enter a name for the new Letter Template.
- Click **OK**.



In the save success popup

- Click **OK**.

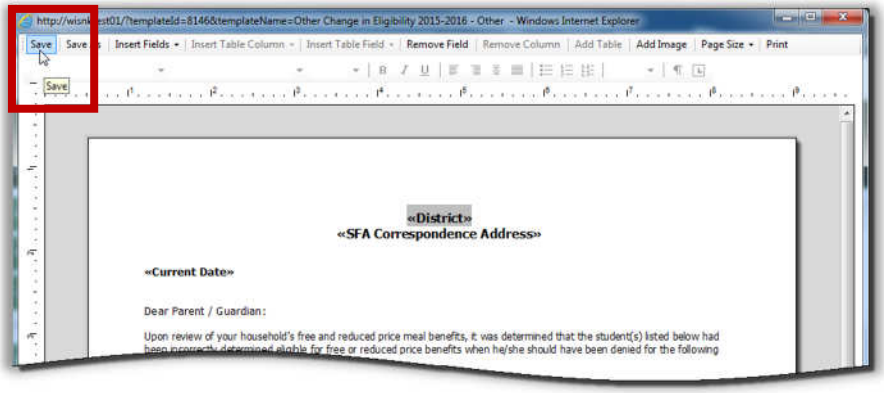


On the window toolbar

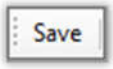
- Click **Close** ( ) to close the *Letter Template* window.

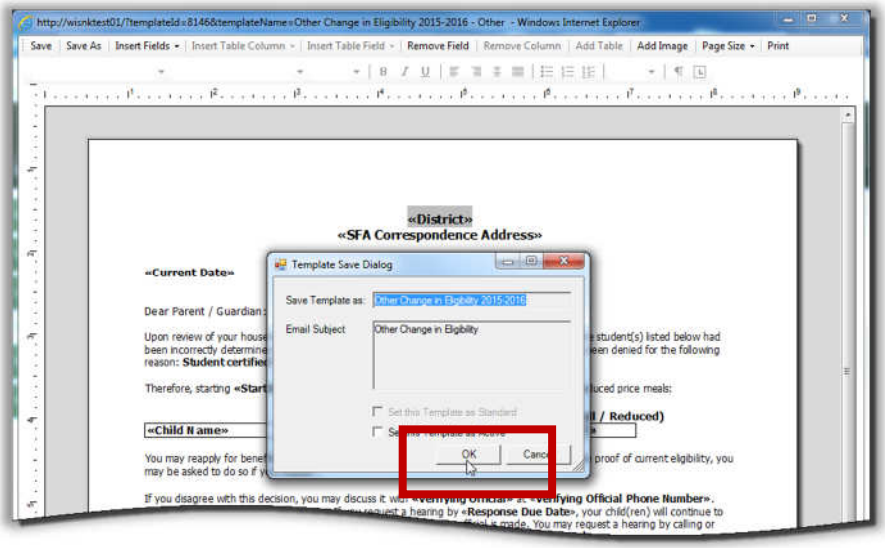
Saving Updates to a Custom Letter Template

A Custom Letter Template can have changes saved directly to the template, or it can be saved with a new name.

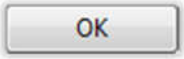


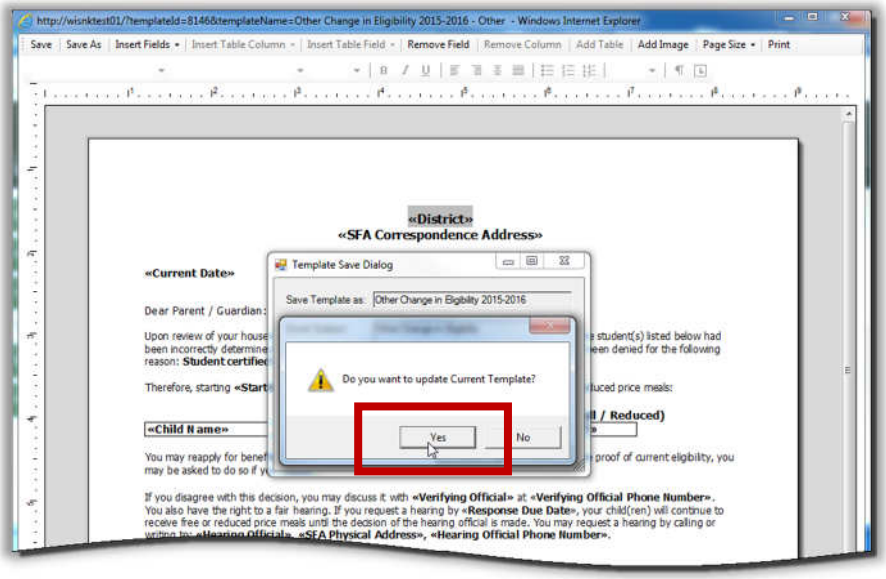
In the *Letter Template* window

- Click  on the window toolbar.



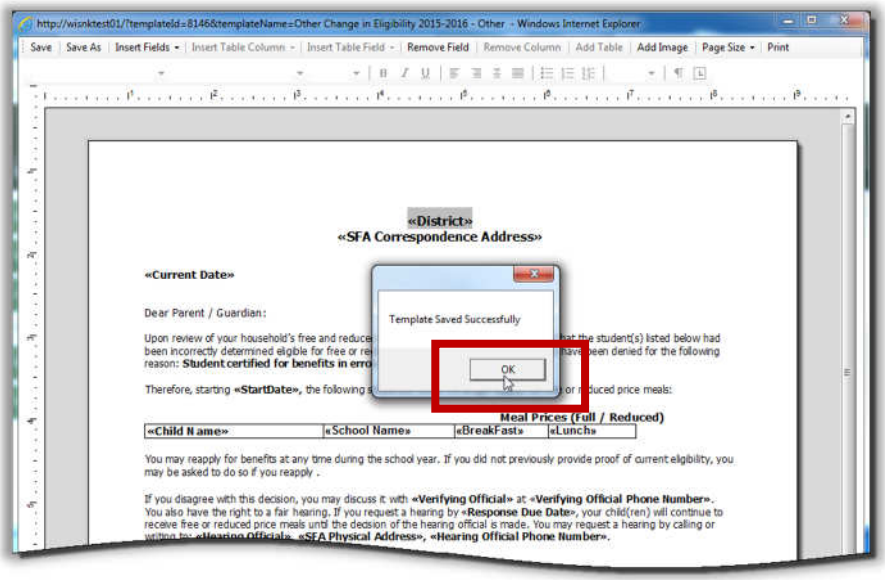
In the *Save* popup

- Enter a name for the new custom template
- Click  .



You are asked to confirm the save to the template. In the popup

- Click Yes .

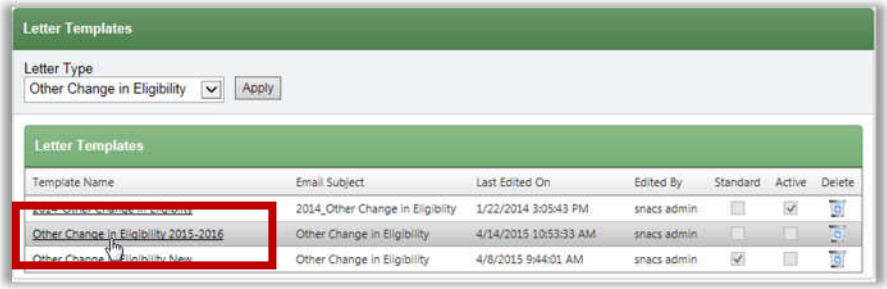


In the popup

- Click OK .
- Click **Close** ( ) to close the *Letter Template* widow.

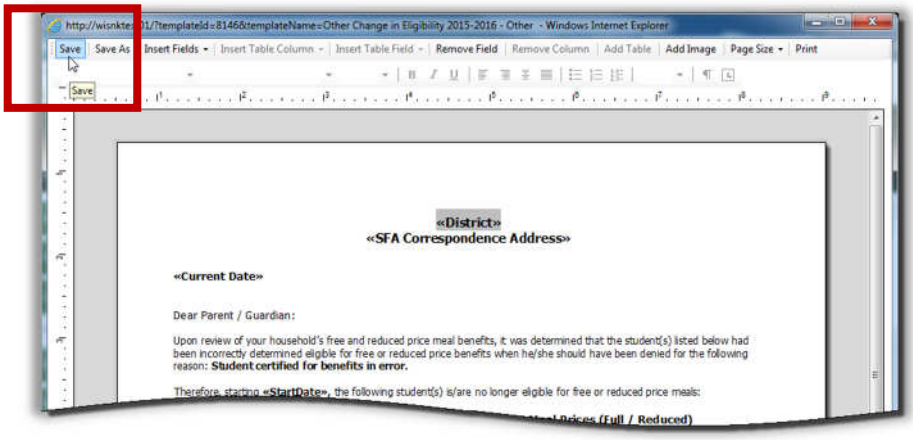
Setting the Active Letter Template

A single Letter Template is set as the Active letter. The Active letter is used by the notification function when the function sends a print request.



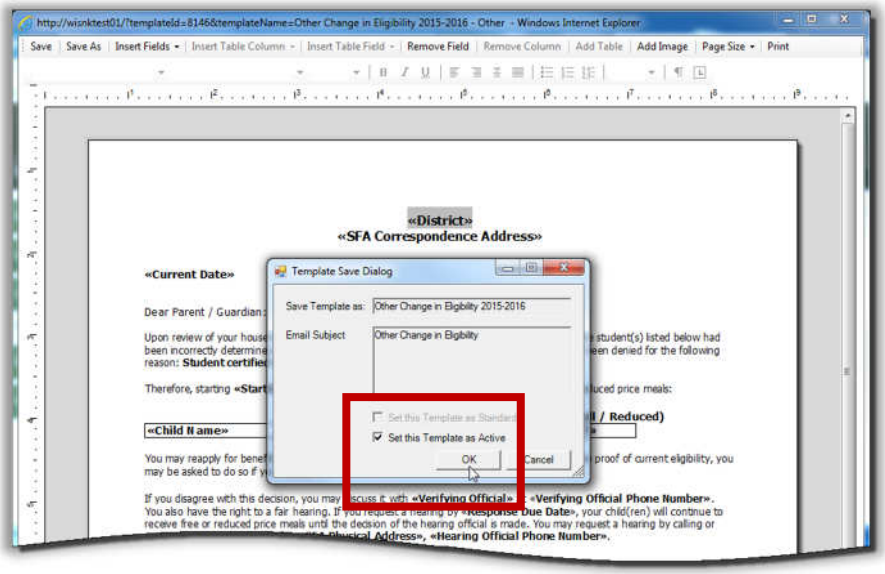
On the *Letter Template* page

- Display a list of template letters for a Letter Type.
- Click a **Template Name** link in the **Letter Templates** list.



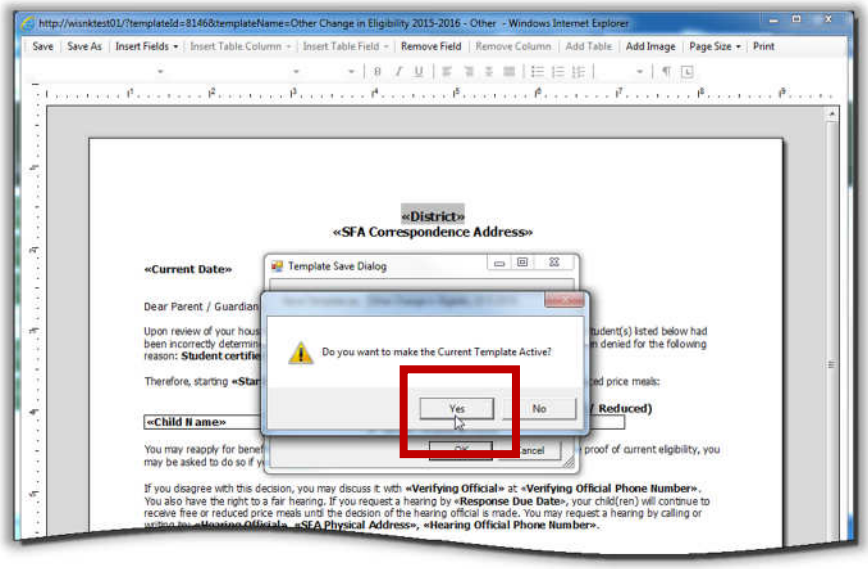
In the Letter Template window

- Click either **Save** or **Save As** on the toolbar.



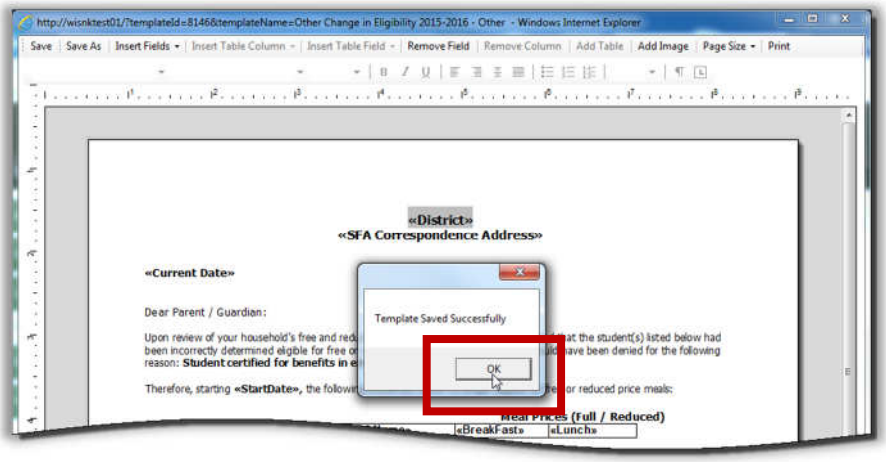
In the **Template Save** popup

- Click **Set this Template as Active**.
- Click OK .



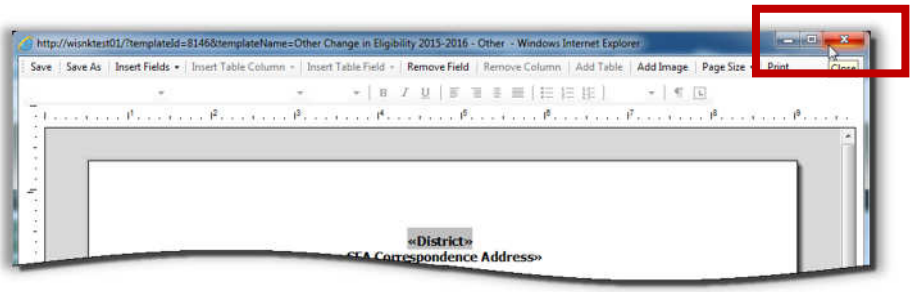
In the confirmation popup

- Click Yes .



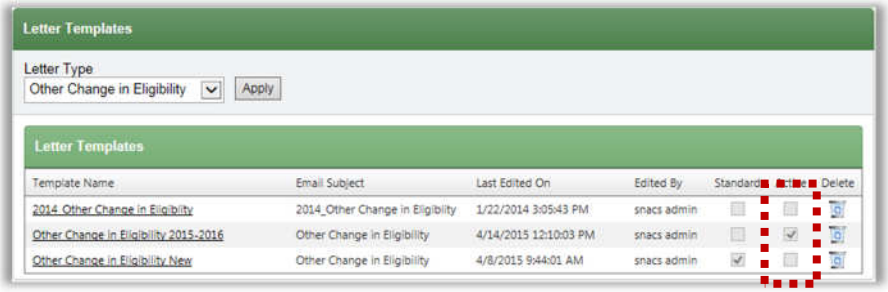
In the *Save* message

- Click OK .



On the window toolbar

- Click Close ( ) to close the Letter Template window.

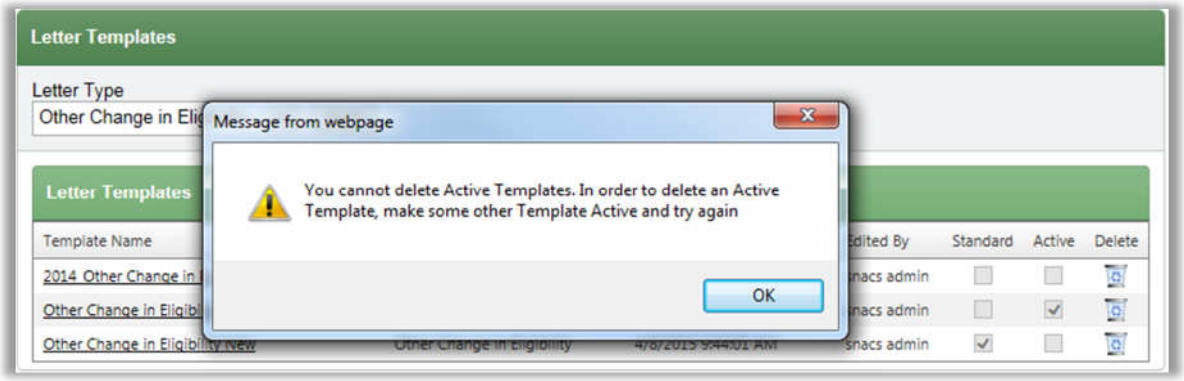


Active is now selected in the Letter Template listing on the *Letter Templates* page.

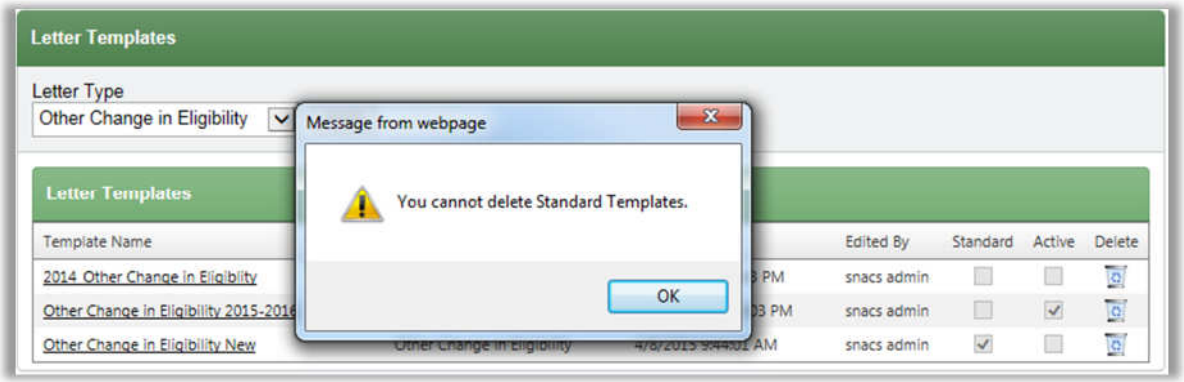
Deleting a Letter Template

Letter Templates can be deleted at any time. However, two letter-template types that cannot be deleted are

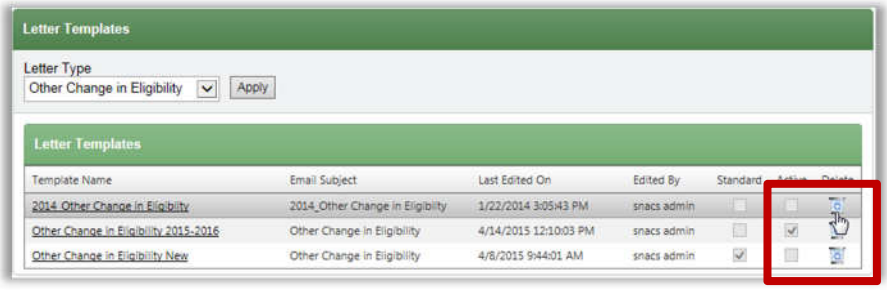
- Active – only non-active letter templates can be deleted; make a different letter template the active letter before deleting a letter template.



- Standard – standard letter templates can never be deleted.

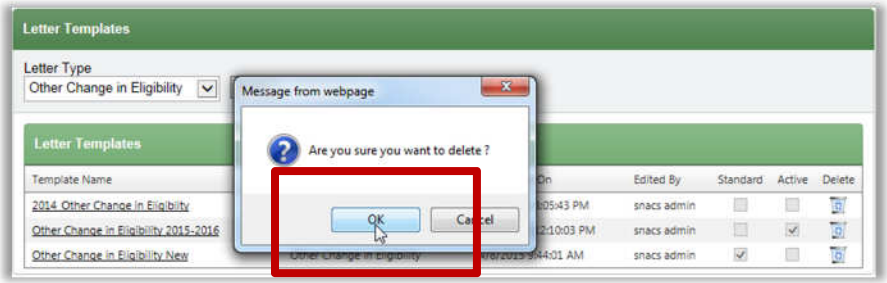


To delete a custom Letter Template



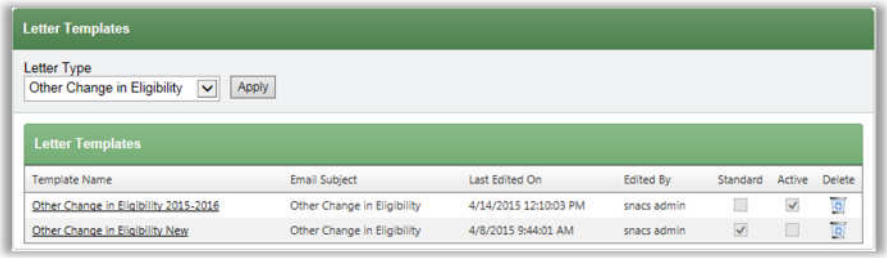
On the *Letter Template* page

- Display a list of template letters for a Letter Type.
- Click **Delete** ( ) in a template listing.



In the confirmation popup

- Click OK .



The letter template is removed from the **Letter Templates** list.

End of Chapter

Chapter 5: Eligibility Reports

In this chapter you will learn how to

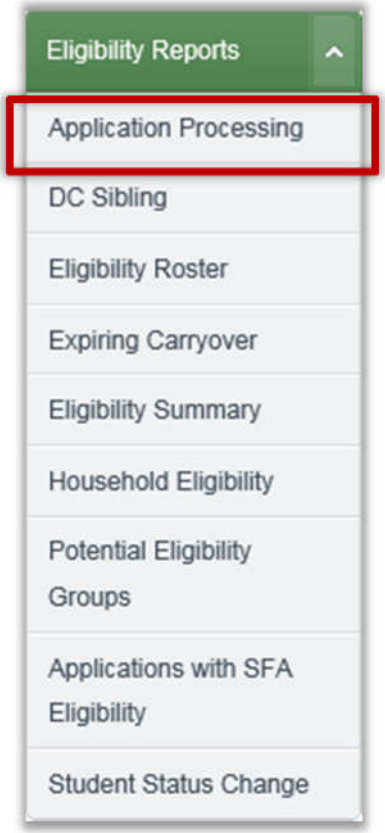
- ✓ Generate reports listing the number of processed vs. non processed applications, students that meet selected eligibility criteria.
- ✓ Generate a report that lists all students with current eligibility expiration date, a history of eligibility change start and end dates.
- ✓ Generate a report listing all students imported through Direct Certification that may have a possible sibling match.

Eligibility Reports at a Glance

Menu Selection	Description
Application Processing	Lists the number of processed and not processed applications by entry method.
DC Sibling	Lists students who have been matched to a student included in a Direct Certification import.
Eligibility Roster	Lists students meeting a selected set of eligibility criteria and eligibility reasons.
Expiring Carryover	Lists all current students with free and reduced meal benefits and their Eligibility expiration date (during Carryover period only).
Eligibility Summary	Lists students and their eligibility during the period specified. Students may have more than one eligibility listed on the report.
Household Eligibility	Lists students in the same household grouping.
Potential Eligibility Groups	Lists active students with non-matching Household IDs that have the same address or guardian.
Applications with SFA Eligibility	Lists applications that had SNACS eligibility overridden and were assigned SFA Eligibility in the validation process.
Student Status Change	Lists students whose Eligibility status changed in a selected date range.

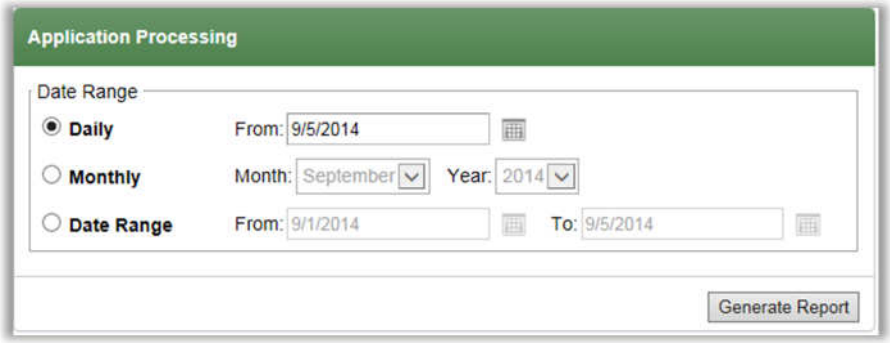
Table 5.1 Eligibility Reports Menu Selections

Application Processing



Application Processing lists the number of processed and not processed applications by entry method. Four entry methods are listed with grand totals by entry method and status provided.

Processed applications are listed in a second table by the user name who processed the applications. Four entry methods are listed with grand totals by entry method and user name provided.



By default on the *Application Processing* page

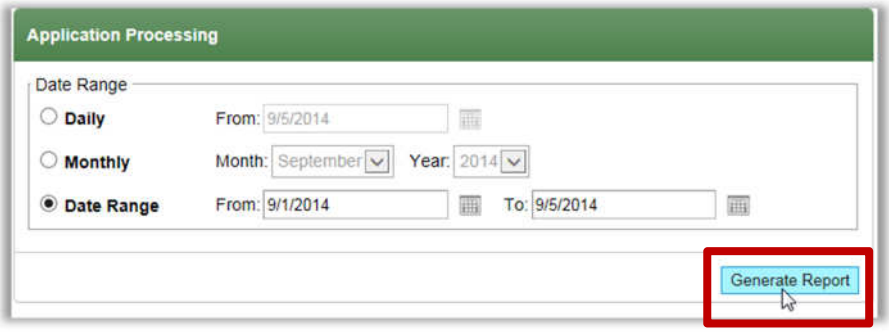
- **Date Range** is set to "Daily" with the current date selected.

Page Functions

Field/Button	Description
Generate Report	Click to generate the report using the selected report options.

Table 5.2 Application Processing Page Functions

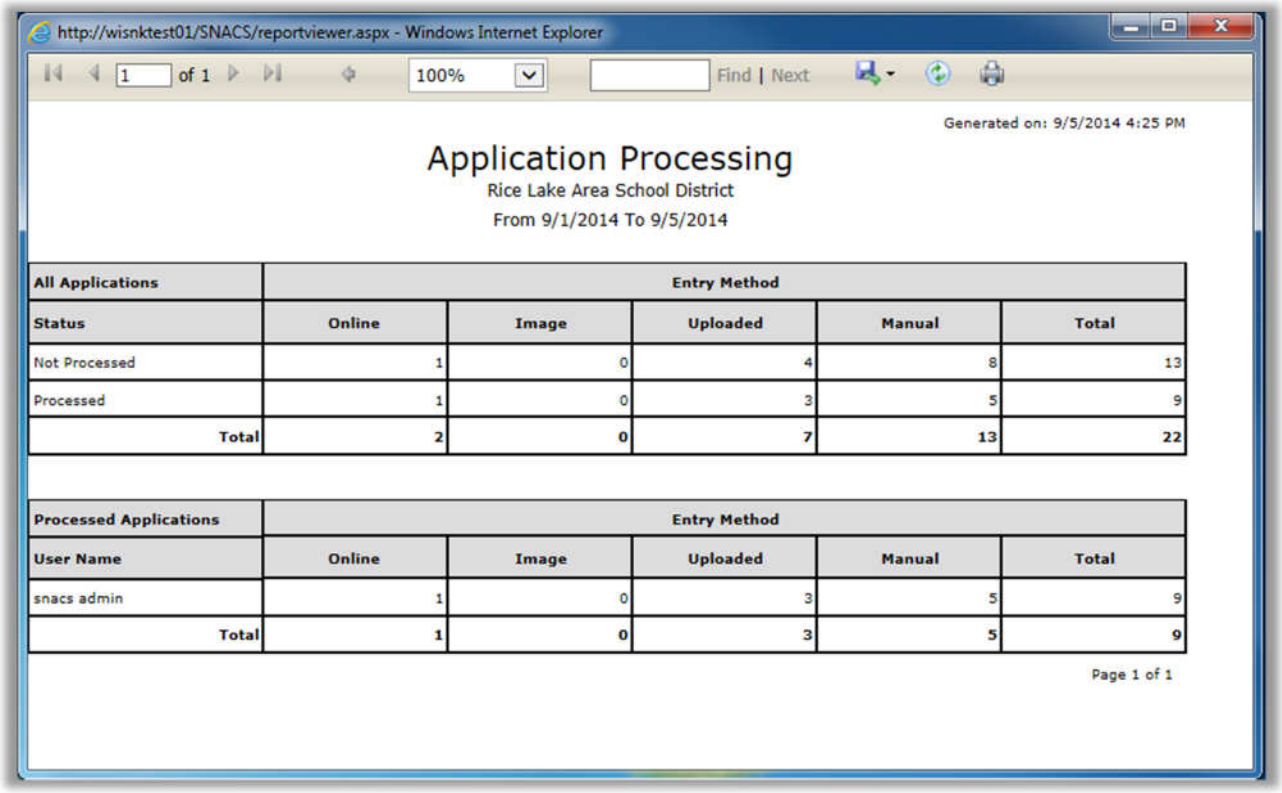
Generating an Application Processing Report



On the *Eligibility Summary* page

- In **Date Range**, select a date option and corresponding date range.
- Click Generate Report .

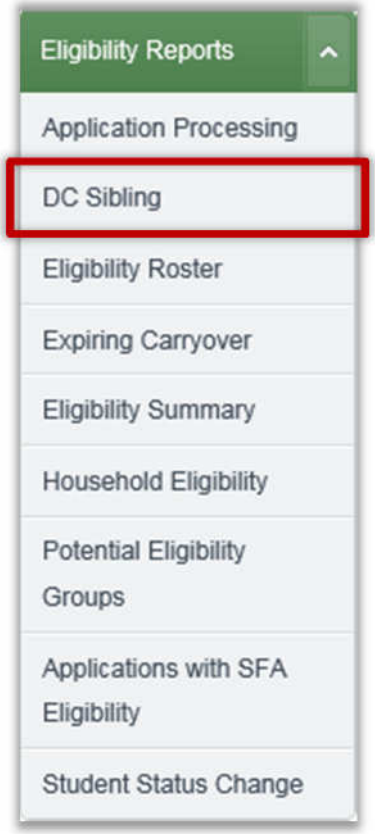
The Application Processing report appears in the report viewer window.



All Applications	Entry Method				
Status	Online	Image	Uploaded	Manual	Total
Not Processed	1	0	4	8	13
Processed	1	0	3	5	9
Total	2	0	7	13	22

Processed Applications	Entry Method				
User Name	Online	Image	Uploaded	Manual	Total
snacs admin	1	0	3	5	9
Total	1	0	3	5	9

DC Sibling



DC Sibling lists students who have been matched to a student included in a Direct Certification import.

By default on the *DC Sibling* page

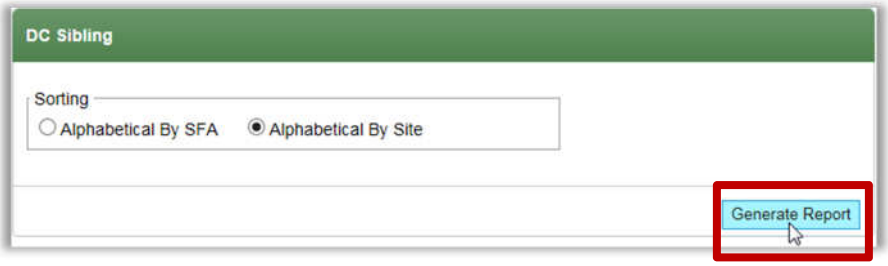
- **Sorting** is set to "Alphabetical by SFA."

Page Functions

Field/Button	Description
Generate Report	Click to generate the report using the selected report option.

Table 5.3 DC Sibling Page Functions

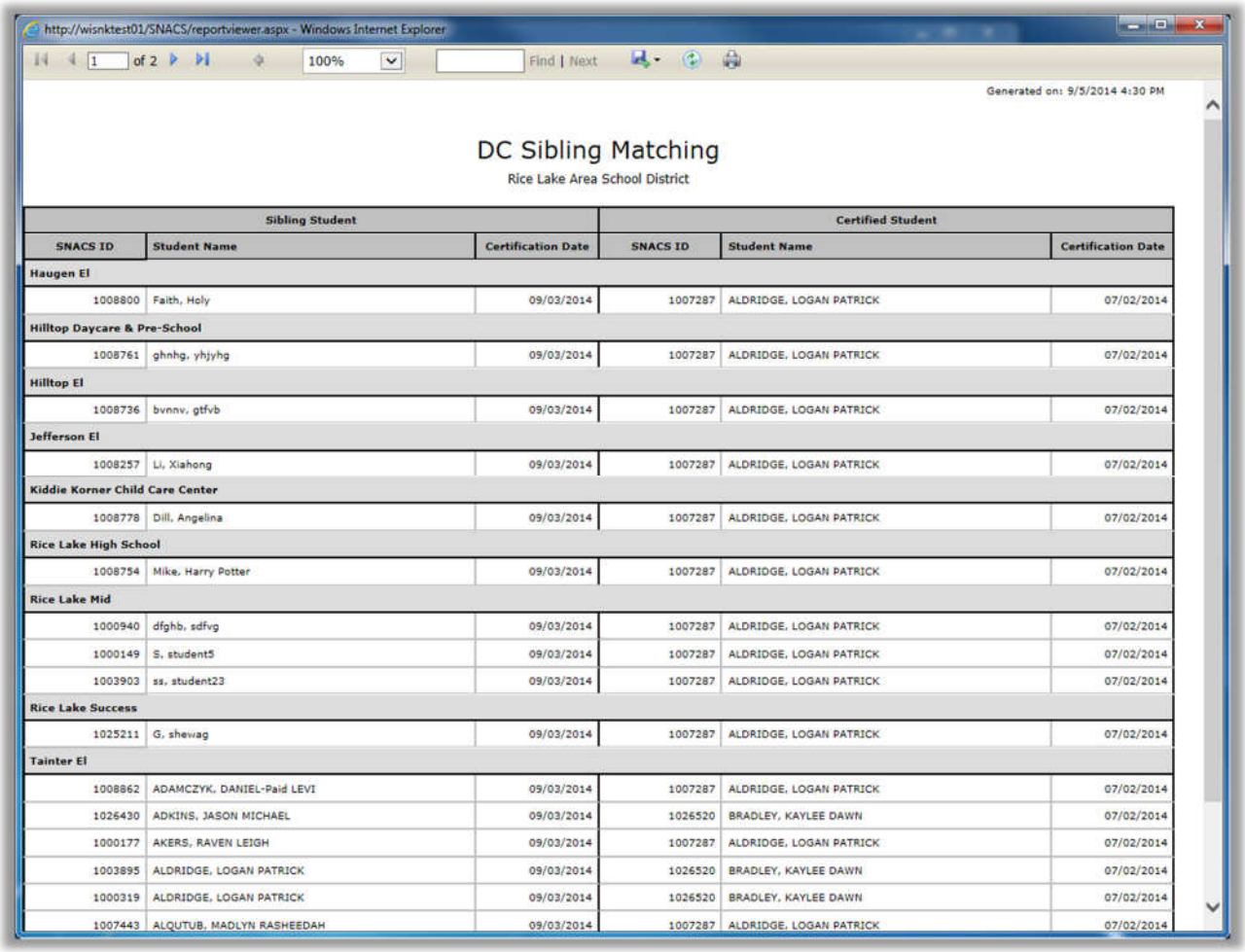
Generating a DC Sibling Matching Report



On the *DC Sibling* page

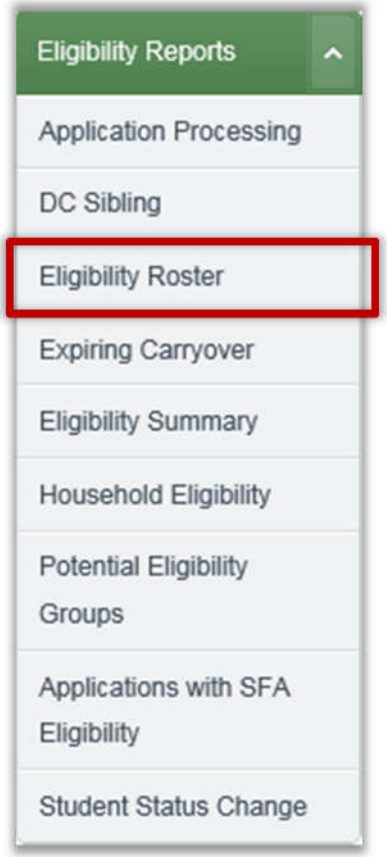
- In **Sorting**, select to either alphabetically sort students within the entire SFA or within each site in the SFA.
- Click Generate Report .

The DC Sibling Matching report appears in the report viewer window.

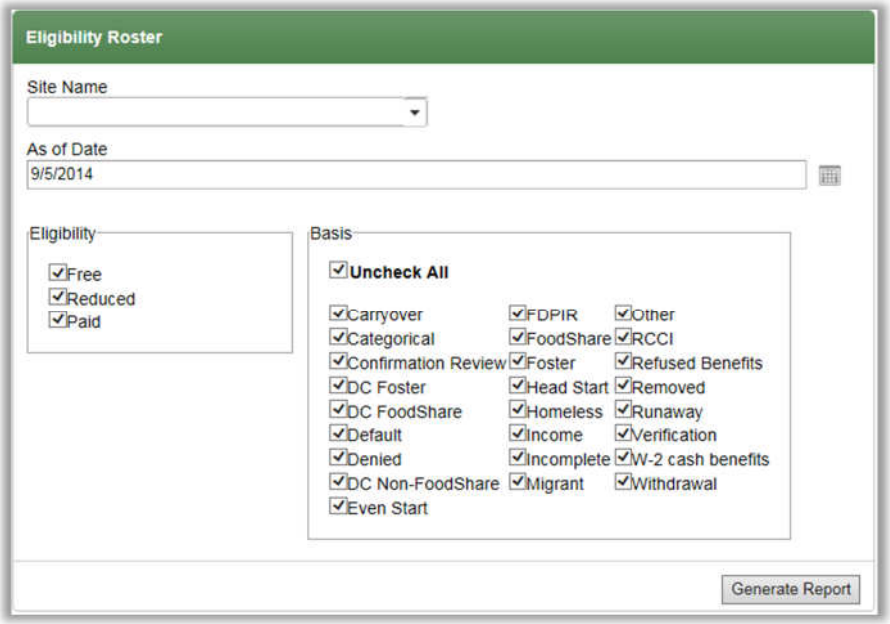


Sibling Student			Certified Student		
SNACS ID	Student Name	Certification Date	SNACS ID	Student Name	Certification Date
Haugen El					
1008800	Faith, Holy	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014
Hilltop Daycare & Pre-School					
1008761	ghnhg, yhjyhg	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014
Hilltop El					
1008736	bvnnv, gtfvb	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014
Jefferson El					
1008257	Li, Xiahong	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014
Kiddie Korner Child Care Center					
1008778	Dill, Angelina	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014
Rice Lake High School					
1008754	Mike, Harry Potter	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014
Rice Lake Mid					
1000940	dfghb, sdfvg	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014
1000149	S, student5	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014
1003903	ss, student23	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014
Rice Lake Success					
1025211	G, shewag	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014
Tainter El					
1008862	ADAMCZYK, DANIEL-Paid LEVI	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014
1026430	ADKINS, JASON MICHAEL	09/03/2014	1026520	BRADLEY, KAYLEE DAWN	07/02/2014
1000177	AKERS, RAVEN LEIGH	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014
1003895	ALDRIDGE, LOGAN PATRICK	09/03/2014	1026520	BRADLEY, KAYLEE DAWN	07/02/2014
1000319	ALDRIDGE, LOGAN PATRICK	09/03/2014	1026520	BRADLEY, KAYLEE DAWN	07/02/2014
1007443	ALQUTUB, MADLYN RASHEEDAH	09/03/2014	1007287	ALDRIDGE, LOGAN PATRICK	07/02/2014

Eligibility Roster



Eligibility Roster lists students meeting a selected set of eligibility criteria and eligibility reasons.



By default on the *Eligibility Roster* page

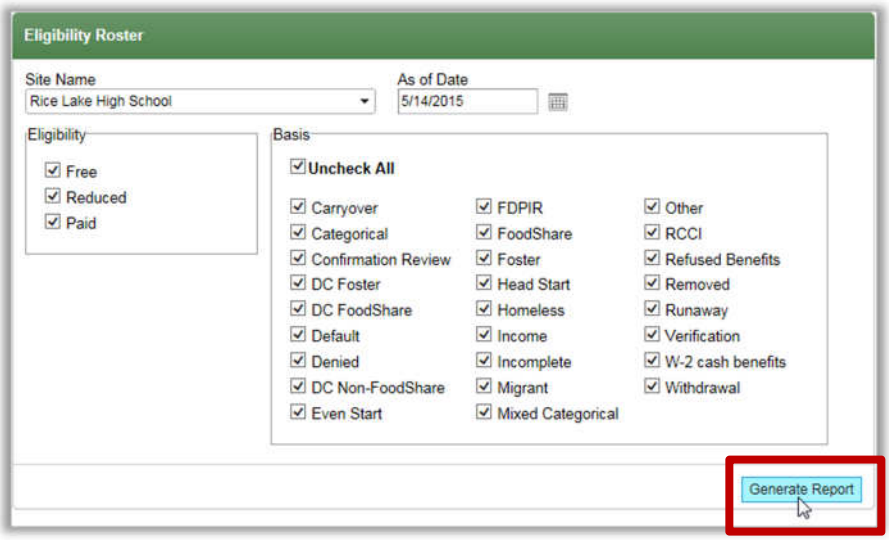
- **Site Name** is blank; leaving this field blank generates a report that includes all sites in the SFA.
- **As Of Date** is set to the current date.
- All Eligibility types are selected in **Eligibility**.
- All eligibility reasons are selected in **Basis.**

Page Functions

Field/Button	Description
Generate Report	Click to generate the report using the selected report option.

Table 5.4 Eligibility Roster Page Functions

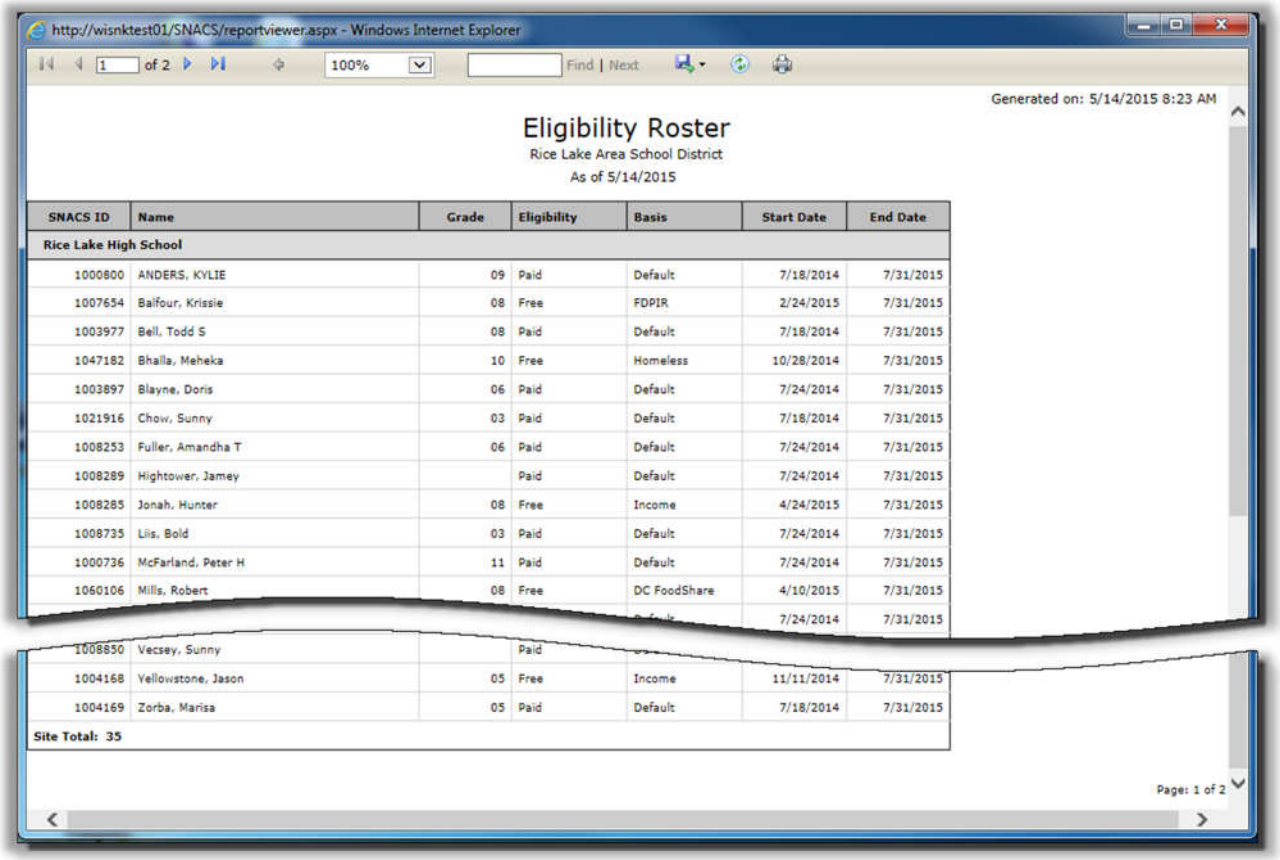
Generating an Eligibility Roster Report



On the *Eligibility Roster* page

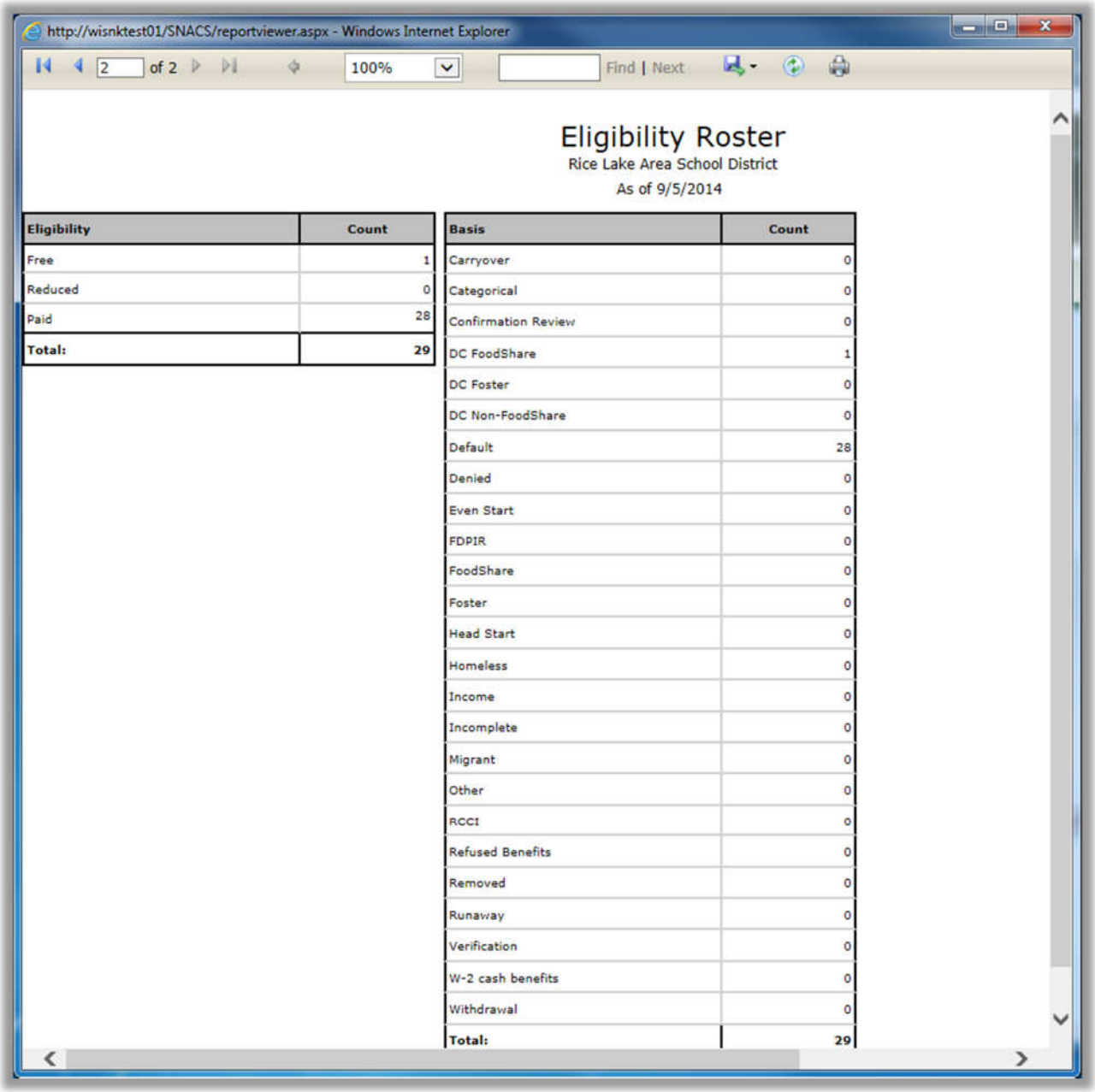
- In **Site Name**, select a site or leave blank to include All.
- In **As of Date**, enter or select a date.
- In **Eligiblity**, select one or more eligibility types.
- In **Basis**, select one or more eligiblity reasons.
- Click Generate Report .

The Eligibility Roster report appears in the report viewer window. All students meeting the selected options appear on the first set of pages.



SNACS ID	Name	Grade	Eligibility	Basis	Start Date	End Date
Rice Lake High School						
1000800	ANDERS, KYLIE	09	Paid	Default	7/18/2014	7/31/2015
1007654	Balfour, Krissie	08	Free	FDPIR	2/24/2015	7/31/2015
1003977	Bell, Todd S	08	Paid	Default	7/18/2014	7/31/2015
1047182	Bhalla, Meheka	10	Free	Homeless	10/28/2014	7/31/2015
1003897	Blayne, Doris	06	Paid	Default	7/24/2014	7/31/2015
1021916	Chow, Sunny	03	Paid	Default	7/18/2014	7/31/2015
1008253	Fuller, Amandha T	06	Paid	Default	7/24/2014	7/31/2015
1008289	Hightower, Jamey		Paid	Default	7/24/2014	7/31/2015
1008285	Jonah, Hunter	08	Free	Income	4/24/2015	7/31/2015
1008735	Lils, Bold	03	Paid	Default	7/24/2014	7/31/2015
1000736	McFarland, Peter H	11	Paid	Default	7/24/2014	7/31/2015
1060106	Mills, Robert	08	Free	DC FoodShare	4/10/2015	7/31/2015
					7/24/2014	7/31/2015
1008850	Vecsey, Sunny		Paid			
1004168	Yellowstone, Jason	05	Free	Income	11/11/2014	7/31/2015
1004169	Zorba, Marisa	05	Paid	Default	7/18/2014	7/31/2015
Site Total: 35						

The second set of pages lists counts for each selected Eligibility and Basis.



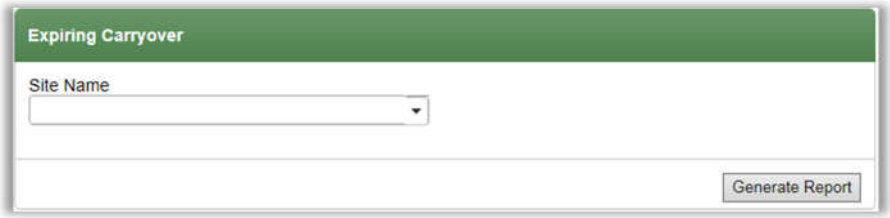
Eligibility Roster
Rice Lake Area School District
As of 9/5/2014

Eligibility	Count
Free	1
Reduced	0
Paid	28
Total:	**29**

Basis	Count
Carryover	0
Categorical	0
Confirmation Review	0
DC FoodShare	1
DC Foster	0
DC Non-FoodShare	0
Default	28
Denied	0
Even Start	0
FDPIR	0
FoodShare	0
Foster	0
Head Start	0
Homeless	0
Income	0
Incomplete	0
Migrant	0
Other	0
RCCI	0
Refused Benefits	0
Removed	0
Runaway	0
Verification	0
W-2 cash benefits	0
Withdrawal	0
Total:	**29**

Expiring Carryover

Expiring Carryover lists all students with Carryover free and reduced-price meal benefits and the expiration date of their Carryover eligibility. The students are listed within site name and the report provides the SNACS ID, grade, eligibility, and expiration date for each listed student.



By default on the *Expiring Carryover* page

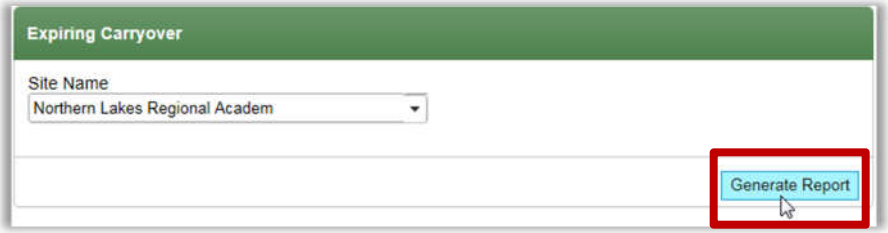
- **Site Name** is blank; leaving this selection blank includes all students from all schools

Page Functions

Field/Button	Description
Generate Report	Click to generate the report using the selected report option.

Table 5.5 Expiring Carryover Page Functions

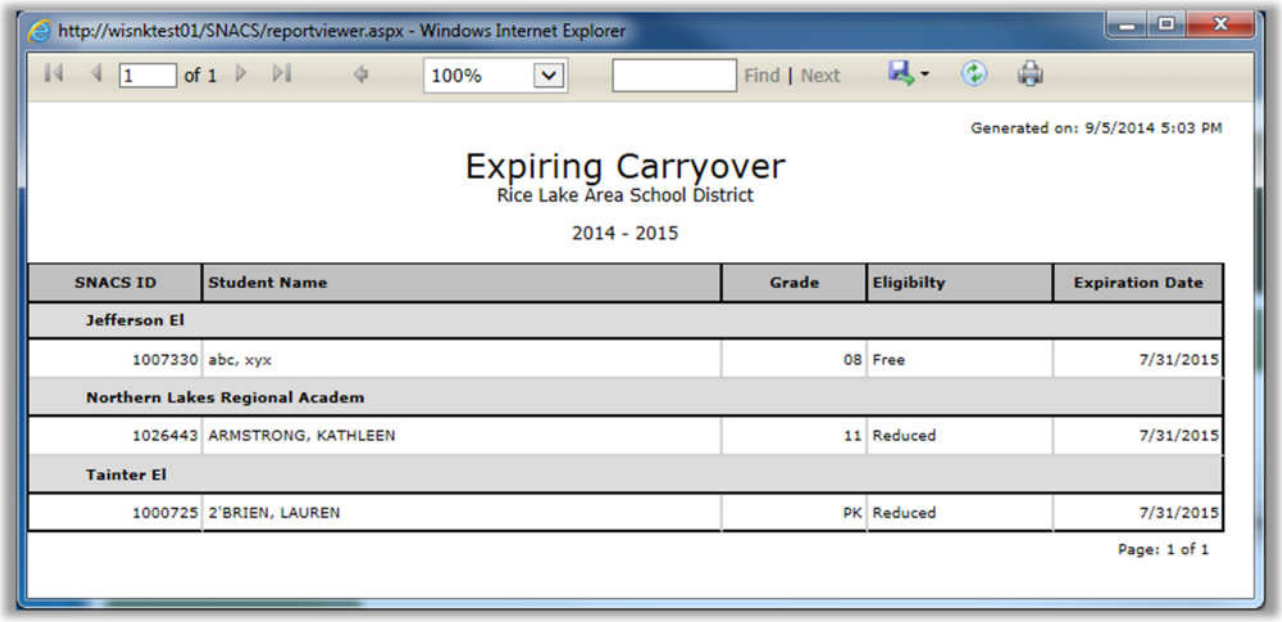
Generating an Expiring Carryover Report



On the *Expiring Carryover* page

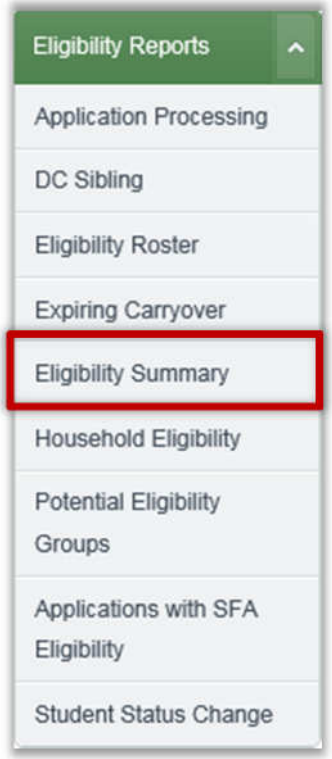
- In **Site Name**, select a site name or leave blank.
- Click Generate Report .

The Expiring Carryover report appears in the report viewer window.

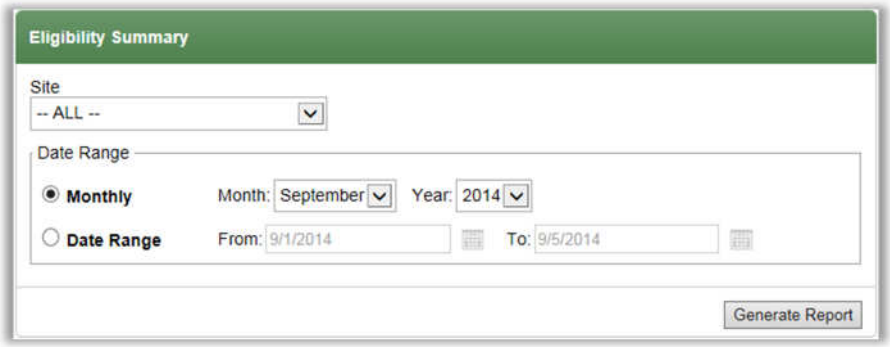


SNACS ID	Student Name	Grade	Eligibilty	Expiration Date
Jefferson El				
1007330	abc, xyx	08	Free	7/31/2015
Northern Lakes Regional Academ				
1026443	ARMSTRONG, KATHLEEN	11	Reduced	7/31/2015
Tainter El				
1000725	2'BRIEN, LAUREN	PK	Reduced	7/31/2015

Eligibility Summary



Eligibility Summary lists students' eligibility for the period specified.



By default on the *Eligibility Summary* page

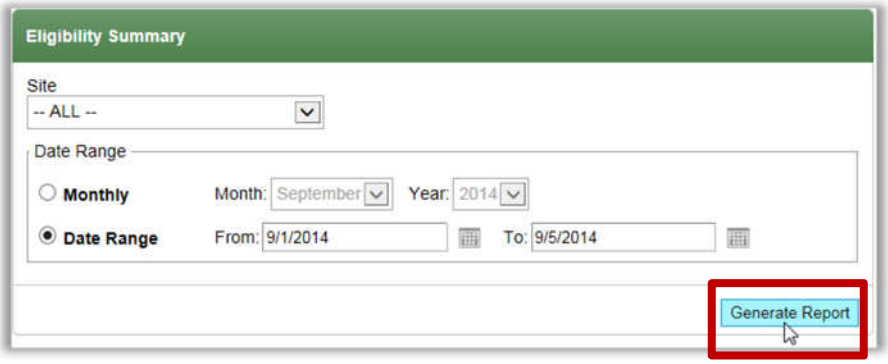
- **Site** is set to "All"; select one site or leave set to "All" to include all sites in the SFA
- **Date Range** is set to monthly with the current month and year selected.

Page Functions

Field/Button	Description
Generate Report	Click to generate the report using the selected report option.

Table 5.6 Eligibility Summary Page Functions

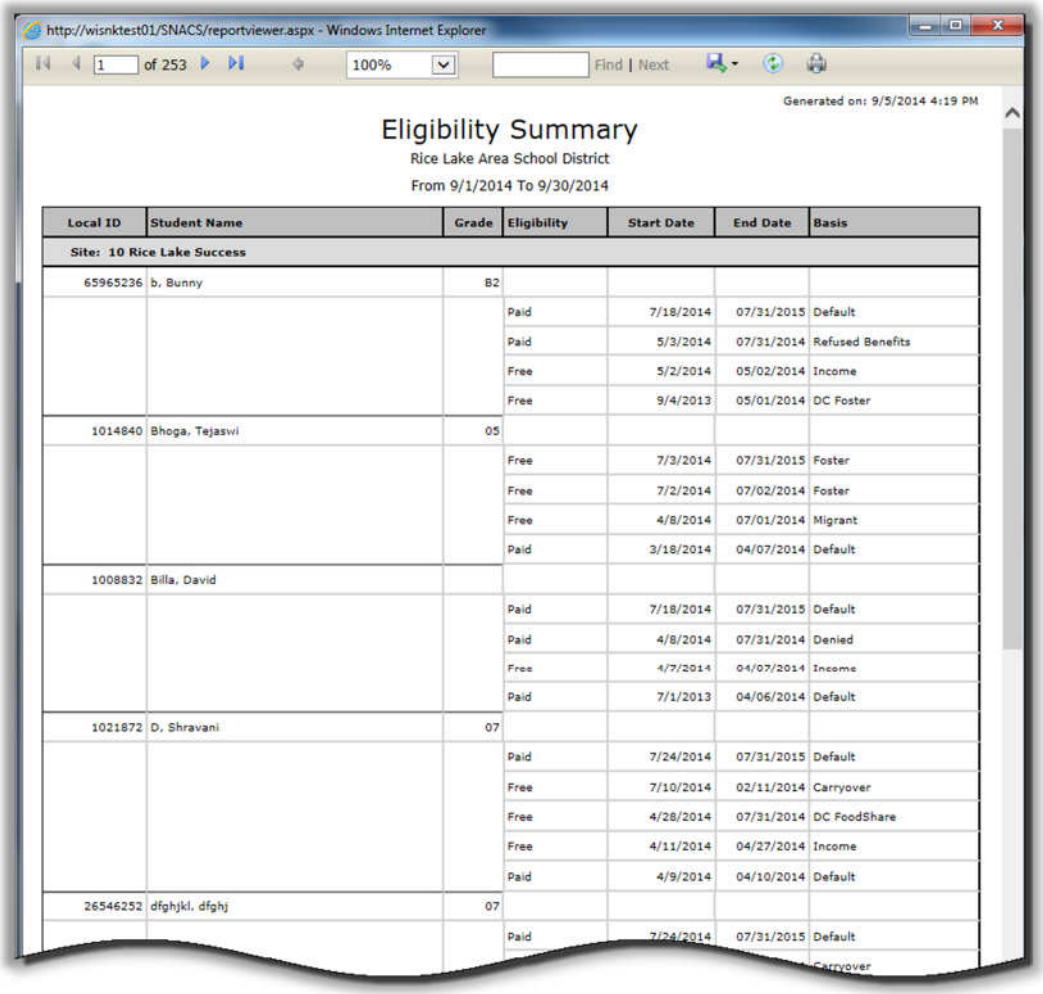
Generating an Eligibility Summary Report



On the *Eligibility Summary* page

- In **Site**, select a site or leave set to "all".
- In **Date Range**, select one option and select a corresponding date range.
- Click Generate Report .

The Eligibility Summary report appears in the report viewer window.



Local ID	Student Name	Grade	Eligibility	Start Date	End Date	Basis
Site: 10 Rice Lake Success						
65965236	b, Bunny	B2				
			Paid	7/18/2014	07/31/2015	Default
			Paid	5/3/2014	07/31/2014	Refused Benefits
			Free	5/2/2014	05/02/2014	Income
			Free	9/4/2013	05/01/2014	DC Foster
1014840	Bhoga, Tejaswi	05				
			Free	7/3/2014	07/31/2015	Foster
			Free	7/2/2014	07/02/2014	Foster
			Free	4/8/2014	07/01/2014	Migrant
			Paid	3/18/2014	04/07/2014	Default
1008832	Billa, David					
			Paid	7/18/2014	07/31/2015	Default
			Paid	4/8/2014	07/31/2014	Denied
			Free	4/7/2014	04/07/2014	Income
			Paid	7/1/2013	04/06/2014	Default
1021872	D, Shravani	07				
			Paid	7/24/2014	07/31/2015	Default
			Free	7/10/2014	02/11/2014	Carryover
			Free	4/28/2014	07/31/2014	DC FoodShare
			Free	4/11/2014	04/27/2014	Income
			Paid	4/9/2014	04/10/2014	Default
26546252	dfghjkl, dfghj	07				
			Paid	7/24/2014	07/31/2015	Default
						Carryover

Household Eligibility

Household Eligibility identifies all students grouped in a household (eligibility group). Use this report for easy, quick comparison of assigned eligibility to determine consistent application of eligibility.

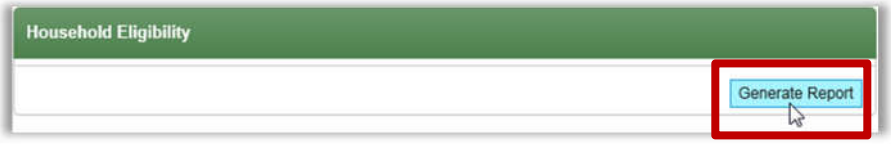
By default on the *Household Eligibility* page no fields or selections are available.

Page Functions

Field/Button	Description
Generate Report	Click to generate the report using the selected report option.

Table 5.7 Household Eligibility Page Functions

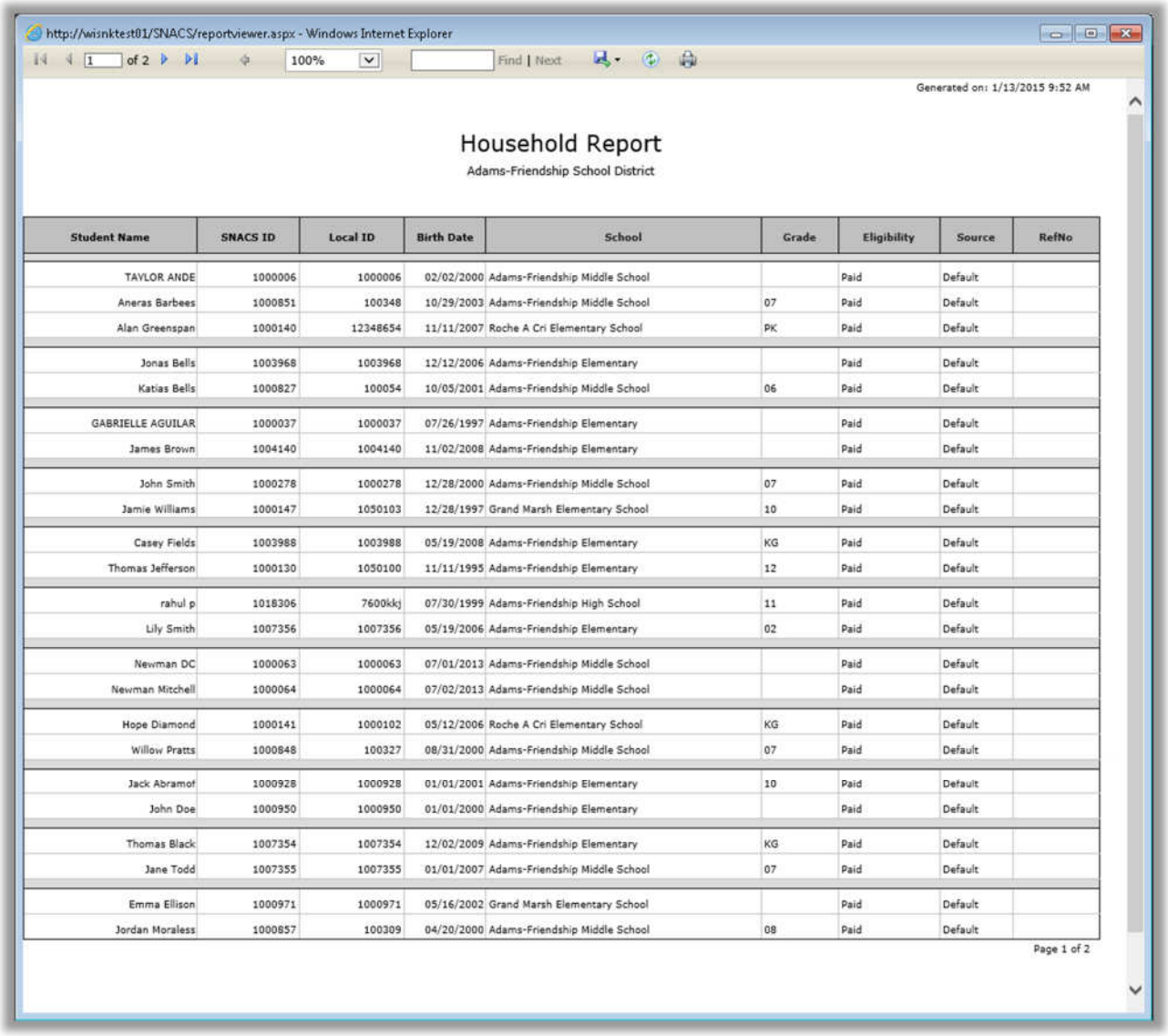
Generating a Household Eligibility Report



On the *Household Eligibility* page

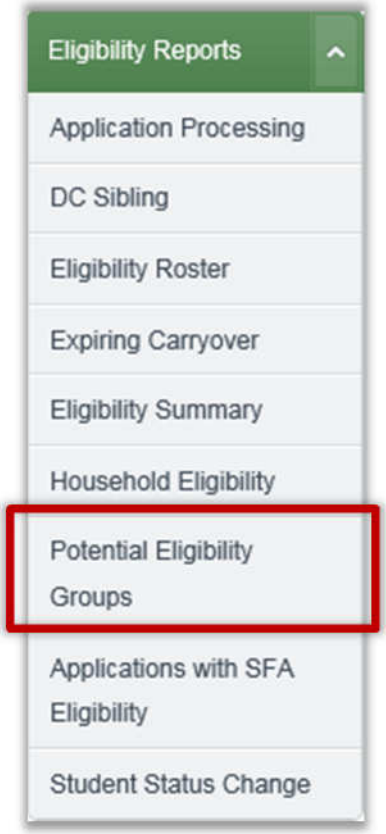
- Click **Generate Report**.

The Household Eligibility report appears in the report viewer window. Household groups appear between the formatted lines.

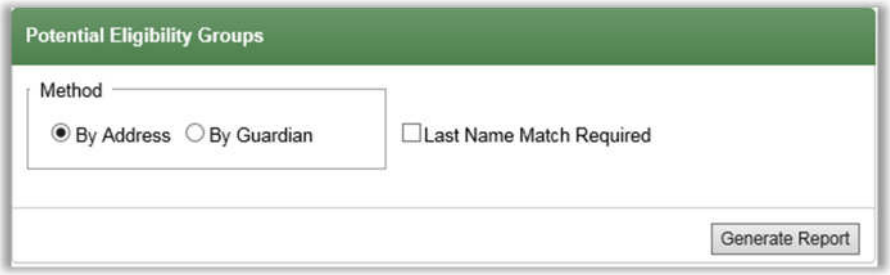


Student Name	SNACS ID	Local ID	Birth Date	School	Grade	Eligibility	Source	RefNo
TAYLOR ANDE	1000006	1000006	02/02/2000	Adams-Friendship Middle School		Paid	Default	
Aneras Barbees	1000851	100348	10/29/2003	Adams-Friendship Middle School	07	Paid	Default	
Alan Greenspan	1000140	12348654	11/11/2007	Roche A Cri Elementary School	PK	Paid	Default	
Jonas Bells	1003968	1003968	12/12/2006	Adams-Friendship Elementary		Paid	Default	
Katias Bells	1000827	100054	10/05/2001	Adams-Friendship Middle School	06	Paid	Default	
GABRIELLE AGUILAR	1000037	1000037	07/26/1997	Adams-Friendship Elementary		Paid	Default	
James Brown	1004140	1004140	11/02/2008	Adams-Friendship Elementary		Paid	Default	
John Smith	1000278	1000278	12/28/2000	Adams-Friendship Middle School	07	Paid	Default	
Jamie Williams	1000147	1050103	12/28/1997	Grand Marsh Elementary School	10	Paid	Default	
Casey Fields	1003988	1003988	05/19/2008	Adams-Friendship Elementary	KG	Paid	Default	
Thomas Jefferson	1000130	1050100	11/11/1995	Adams-Friendship Elementary	12	Paid	Default	
rahul p	1018306	7600kkj	07/30/1999	Adams-Friendship High School	11	Paid	Default	
Lily Smith	1007356	1007356	05/19/2006	Adams-Friendship Elementary	02	Paid	Default	
Newman DC	1000063	1000063	07/01/2013	Adams-Friendship Middle School		Paid	Default	
Newman Mitchell	1000064	1000064	07/02/2013	Adams-Friendship Middle School		Paid	Default	
Hope Diamond	1000141	1000102	05/12/2006	Roche A Cri Elementary School	KG	Paid	Default	
Willow Pratts	1000848	100327	08/31/2000	Adams-Friendship Middle School	07	Paid	Default	
Jack Abramof	1000928	1000928	01/01/2001	Adams-Friendship Elementary	10	Paid	Default	
John Doe	1000950	1000950	01/01/2000	Adams-Friendship Elementary		Paid	Default	
Thomas Black	1007354	1007354	12/02/2009	Adams-Friendship Elementary	KG	Paid	Default	
Jane Todd	1007355	1007355	01/01/2007	Adams-Friendship Middle School	07	Paid	Default	
Emma Ellison	1000971	1000971	05/16/2002	Grand Marsh Elementary School		Paid	Default	
Jordan Moraless	1000857	100309	04/20/2000	Adams-Friendship Middle School	08	Paid	Default	

Potential Eligibility Groups



Potential Eligibility Groups lists students with the same address or same guardian name, but different Household IDs for active students.



By default on the *Potential Eligibility Groups* page

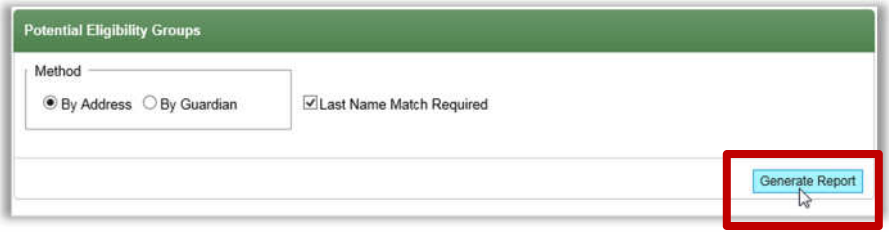
- **Method** is set to "By Address.
- **"Last Name Match Required**" option is not enabled.

Page Functions

Field/Button	Description
Generate Report	Click to generate the report using the selected Method, and option, if applicable.

Table 5.8 Potential Eligibility Groups Functions

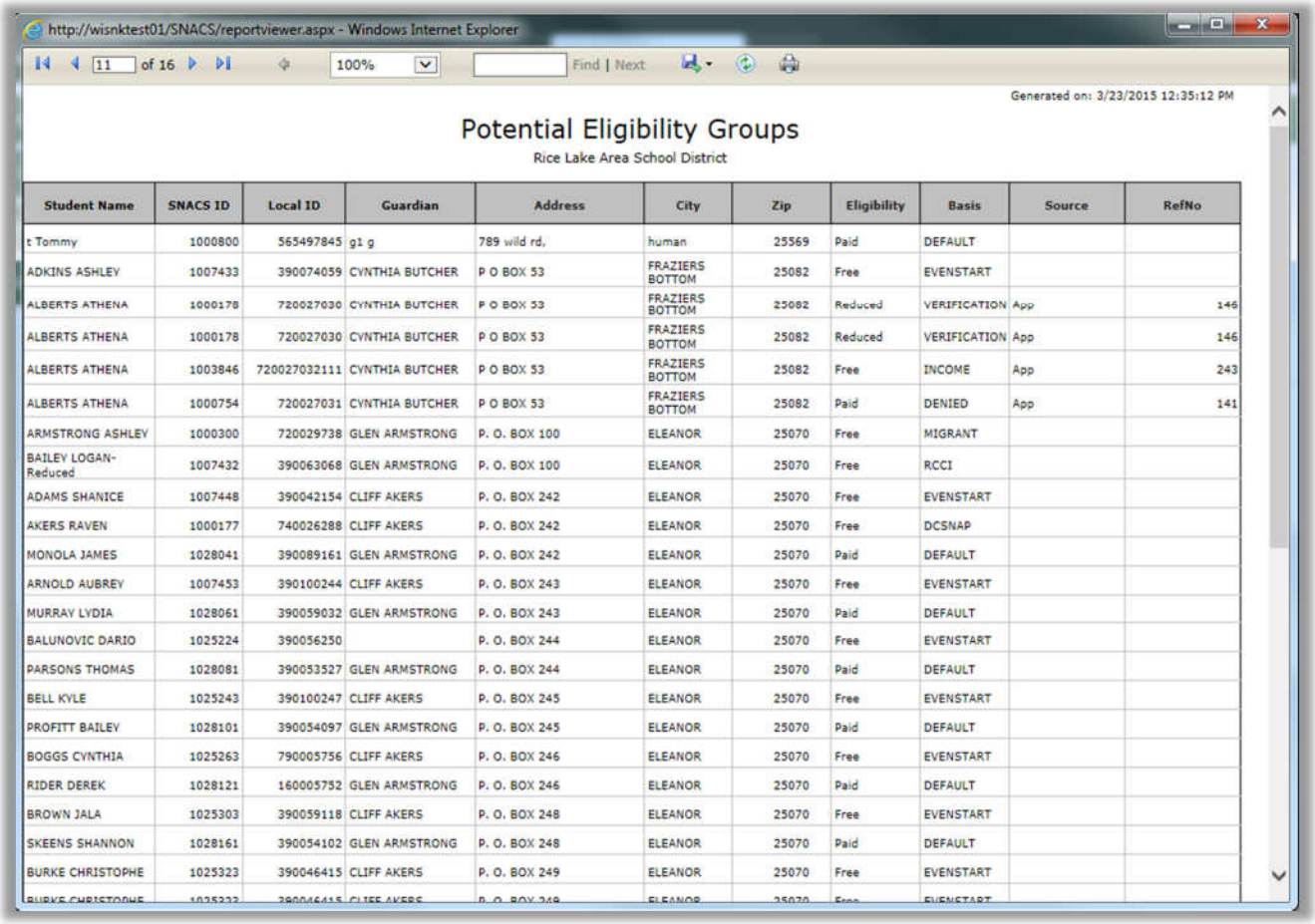
Generating a Potential Eligibility Groups Report



On the *Potential Eligibility Groups* page

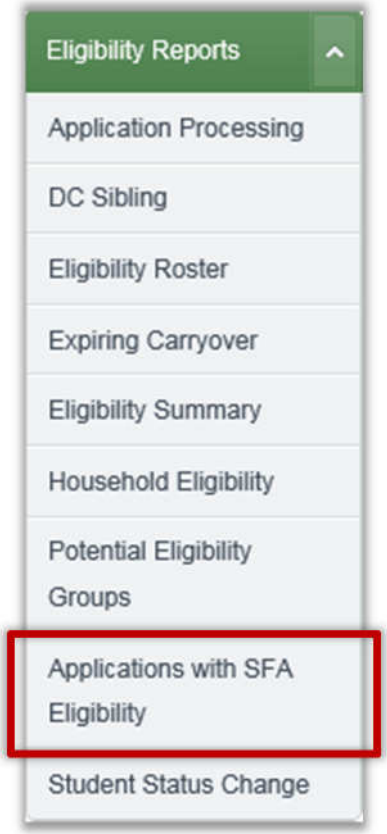
- In **Method**, select a grouping method.
- If needed, select "**Last Name Match Required.**"
- Click Generate Report .

The Potential Eligibility Groups report appears in the report viewer window.



Student Name	SNACS ID	Local ID	Guardian	Address	City	Zip	Eligibility	Basis	Source	RefNo
t Tommy	1000800	565497845	g1 g	789 wild rd,	human	25569	Paid	DEFAULT		
ADKINS ASHLEY	1007433	390074059	CYNTHIA BUTCHER	P O BOX 53	FRAZIERS BOTTOM	25082	Free	EVENSTART		
ALBERTS ATHENA	1000178	720027030	CYNTHIA BUTCHER	P O BOX 53	FRAZIERS BOTTOM	25082	Reduced	VERIFICATION	App	146
ALBERTS ATHENA	1000178	720027030	CYNTHIA BUTCHER	P O BOX 53	FRAZIERS BOTTOM	25082	Reduced	VERIFICATION	App	146
ALBERTS ATHENA	1003846	720027032111	CYNTHIA BUTCHER	P O BOX 53	FRAZIERS BOTTOM	25082	Free	INCOME	App	243
ALBERTS ATHENA	1000754	720027031	CYNTHIA BUTCHER	P O BOX 53	FRAZIERS BOTTOM	25082	Paid	DENIED	App	141
ARMSTRONG ASHLEY	1000300	720029738	GLEN ARMSTRONG	P. O. BOX 100	ELEANOR	25070	Free	MIGRANT		
BAILEY LOGAN-Reduced	1007432	390063068	GLEN ARMSTRONG	P. O. BOX 100	ELEANOR	25070	Free	RCCI		
ADAMS SHANICE	1007448	390042154	CLIFF AKERS	P. O. BOX 242	ELEANOR	25070	Free	EVENSTART		
AKERS RAVEN	1000177	740026288	CLIFF AKERS	P. O. BOX 242	ELEANOR	25070	Free	DCSNAP		
MONOLA JAMES	1028041	390089161	GLEN ARMSTRONG	P. O. BOX 242	ELEANOR	25070	Paid	DEFAULT		
ARNOLD AUBREY	1007453	390100244	CLIFF AKERS	P. O. BOX 243	ELEANOR	25070	Free	EVENSTART		
MURRAY LYDIA	1028061	390059032	GLEN ARMSTRONG	P. O. BOX 243	ELEANOR	25070	Paid	DEFAULT		
BALUNOVIC DARIO	1025224	390056250		P. O. BOX 244	ELEANOR	25070	Free	EVENSTART		
PARSONS THOMAS	1028081	390053527	GLEN ARMSTRONG	P. O. BOX 244	ELEANOR	25070	Paid	DEFAULT		
BELL KYLE	1025243	390100247	CLIFF AKERS	P. O. BOX 245	ELEANOR	25070	Free	EVENSTART		
PROFITT BAILEY	1028101	390054097	GLEN ARMSTRONG	P. O. BOX 245	ELEANOR	25070	Paid	DEFAULT		
BOGGS CYNTHIA	1025263	790005756	CLIFF AKERS	P. O. BOX 246	ELEANOR	25070	Free	EVENSTART		
RIDER DEREK	1028121	160005752	GLEN ARMSTRONG	P. O. BOX 246	ELEANOR	25070	Paid	DEFAULT		
BROWN JALA	1025303	390059118	CLIFF AKERS	P. O. BOX 248	ELEANOR	25070	Free	EVENSTART		
SKEENS SHANNON	1028161	390054102	GLEN ARMSTRONG	P. O. BOX 248	ELEANOR	25070	Paid	DEFAULT		
BURKE CHRISTOPHE	1025323	390046415	CLIFF AKERS	P. O. BOX 249	ELEANOR	25070	Free	EVENSTART		
BURKE CHRISTOPHE	1025323	390046415	CLIFF AKERS	P. O. BOX 249	ELEANOR	25070	Free	EVENSTART		

Applications with SFA Eligibility



Applications with SFA Eligibility lists applications that had SNACS eligibility overridden and were assigned SFA Eligibility in the validation process. Report includes both SNACS and SFA Eligibility, SNACS and SFA Basis, and the Start Date for the SFA Eligibility.

By default on the *Applications with SFA Eligibility* page

- **Academic Year** is set to the current year.

Page Functions

Field/Button	Description
Generate Report	Click to generate the report using the selected Academic Year.

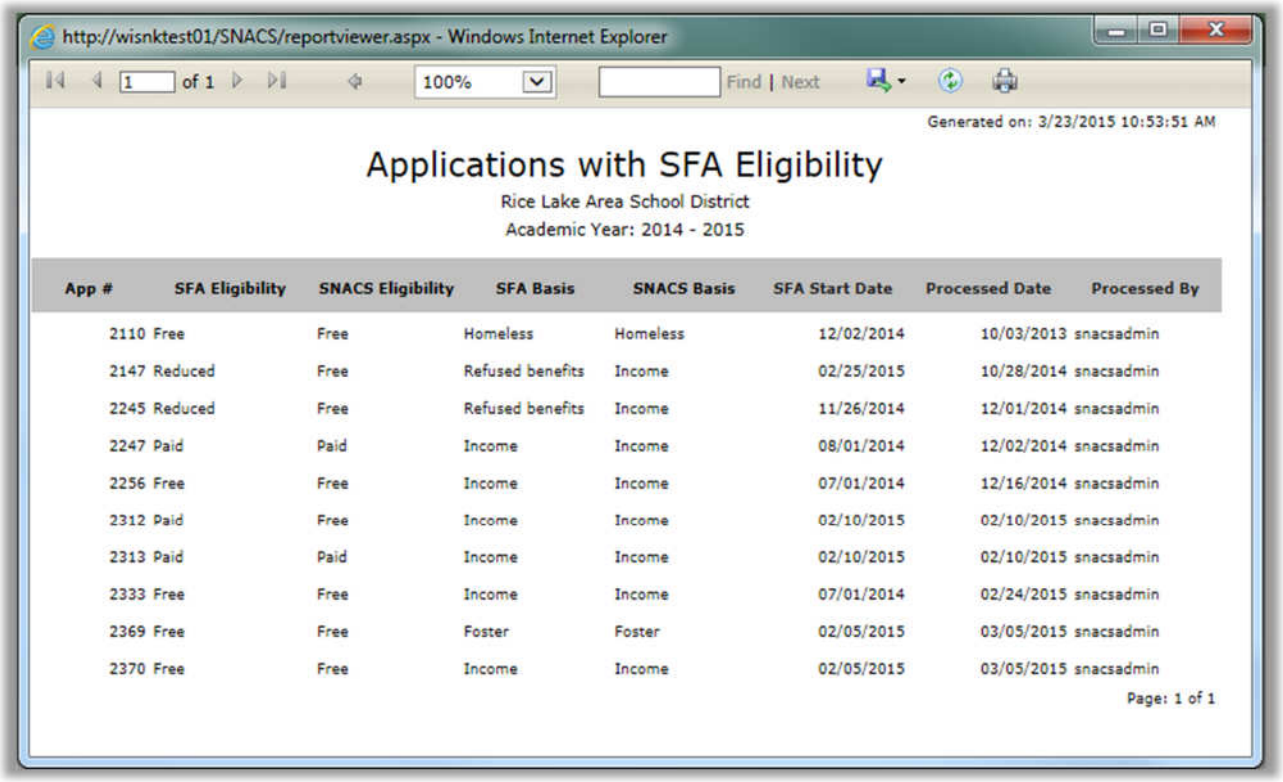
Table 5.9 Applications with SFA Eligibility Functions

Generating an Applications with SFA Eligibility Report

On the *Applications with SFA Eligibility* page

- In **Academic Year**, select a year or leave set to the current year.
- Click Generate Report .

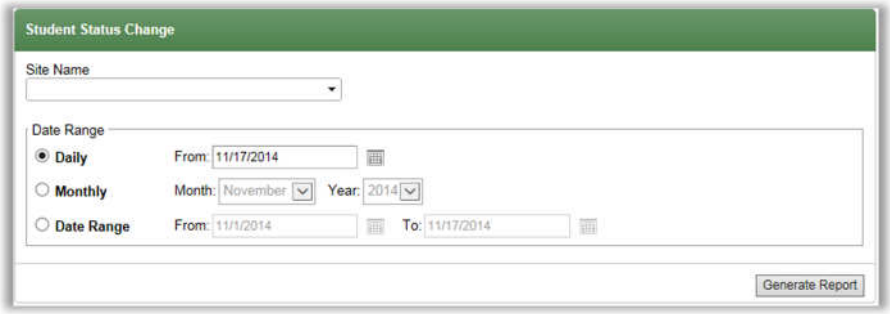
The Applications with SFA Eligibility report appears in the report viewer window.



App #	SFA Eligibility	SNACS Eligibility	SFA Basis	SNACS Basis	SFA Start Date	Processed Date	Processed By
2110	Free	Free	Homeless	Homeless	12/02/2014	10/03/2013	snacsadmin
2147	Reduced	Free	Refused benefits	Income	02/25/2015	10/28/2014	snacsadmin
2245	Reduced	Free	Refused benefits	Income	11/26/2014	12/01/2014	snacsadmin
2247	Paid	Paid	Income	Income	08/01/2014	12/02/2014	snacsadmin
2256	Free	Free	Income	Income	07/01/2014	12/16/2014	snacsadmin
2312	Paid	Free	Income	Income	02/10/2015	02/10/2015	snacsadmin
2313	Paid	Paid	Income	Income	02/10/2015	02/10/2015	snacsadmin
2333	Free	Free	Income	Income	07/01/2014	02/24/2015	snacsadmin
2369	Free	Free	Foster	Foster	02/05/2015	03/05/2015	snacsadmin
2370	Free	Free	Income	Income	02/05/2015	03/05/2015	snacsadmin

Student Status Change

Student Status Change lists students whose eligibility status changed in a selected date range. The report details the beginning and ending eligibility status, the date the status changed, and the reason for the change.



By default on the *Student Status Change* page

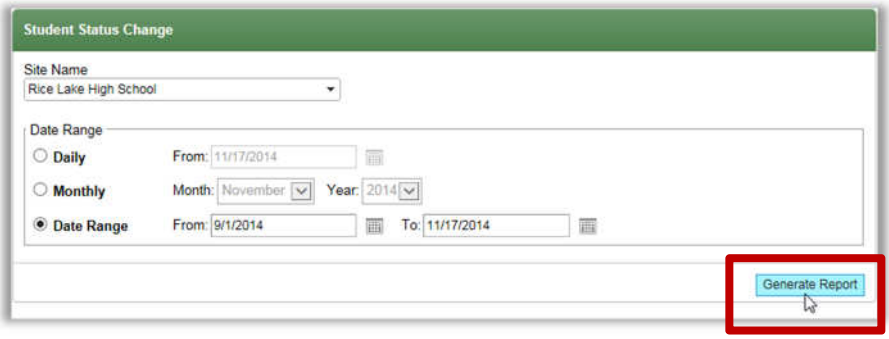
- **Site Name** is blank.
- **Date Range** is set to "Daily" with the current date selected.

Page Functions

Field/Button	Description
Generate Report	Click to generate the report using the selected report options.

Table 5.10 Student Status Change Page Functions

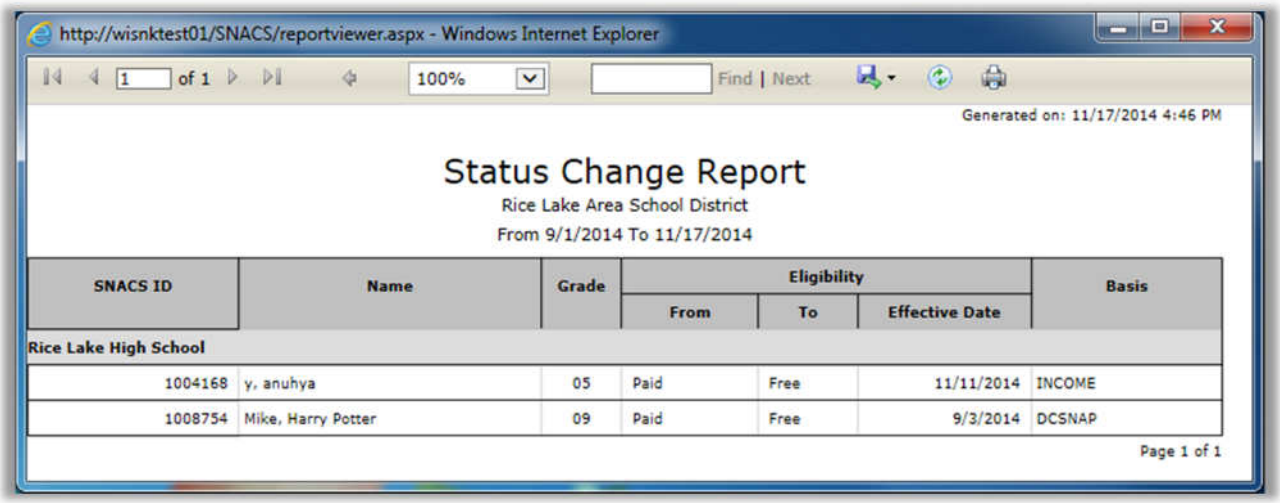
Generating a Student Status Change Report



On the *Student Status Change* page

- In **Site Name**, select a site or leave set to blank to genearate a report for all sites.
- In **Date Range**, select one option andenter or select a corresponding date or date range.
- Click Generate Report .

The Status Change Report appears in the report viewer window.



SNACS ID	Name	Grade	Eligibility			Basis
			From	To	Effective Date	
Rice Lake High School						
1004168	y, anuhya	05	Paid	Free	11/11/2014	INCOME
1008754	Mike, Harry Potter	09	Paid	Free	9/3/2014	DCSNAP

End of Chapter

Chapter 6: Verification

In this chapter you will learn how to

- ✓ Generate a collection of processed applications for the Verification process.
- ✓ Confirm review of an application in the Verification pool.
- ✓ Send 1st Notice and Follow Up notification to an applicant requesting verification documentation.
- ✓ Record a Verification response submitted by an applicant.
- ✓ Record the Verification Results Summary to complete verification of an application.
- ✓ Record a refusal of benefits for an application.
- ✓ View verification information for a selected application.
- ✓ Enter selected data for inclusion in the Collection report.
- ✓ Generate, review and submit the Collection report.

Verification at a Glance

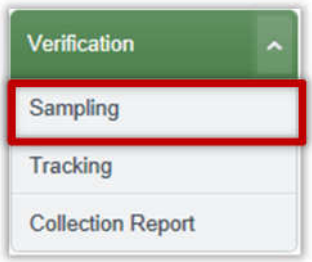
Menu Selection	Description
Sampling	Generate a sample of processed applications to include in the verification process.
Tracking	Track the notification and confirmation process of applications included in the verification process.
Collection Report	Enter data, generate and submit the Collection Report summarizing verification data.

Table 6.1 Verification Menu Selections

Note

Categories and menu selections to which you have access in SNACS are those appropriate for your assigned role(s). When you access the **Verification** menu, you may see a subset of the menu selections listed above.

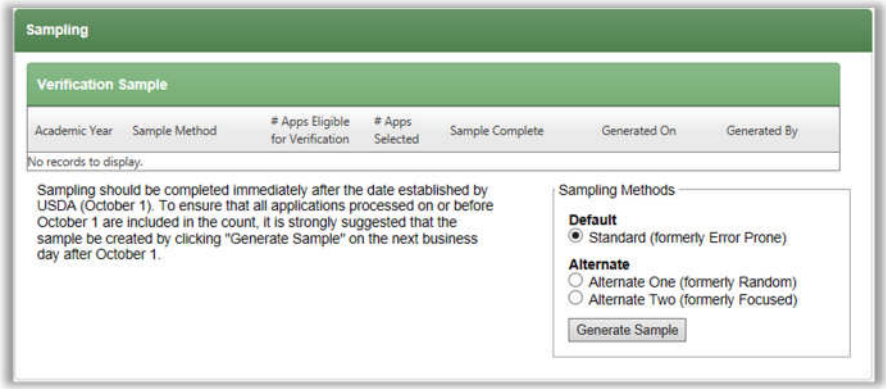
Sampling



Sampling generates a group or collection of applications for the verification process.

This first step in the Verification process is completed on or after October 1st, the deadline set by the USDA.

You will generate the sample only once.



By default on the *Sampling* page

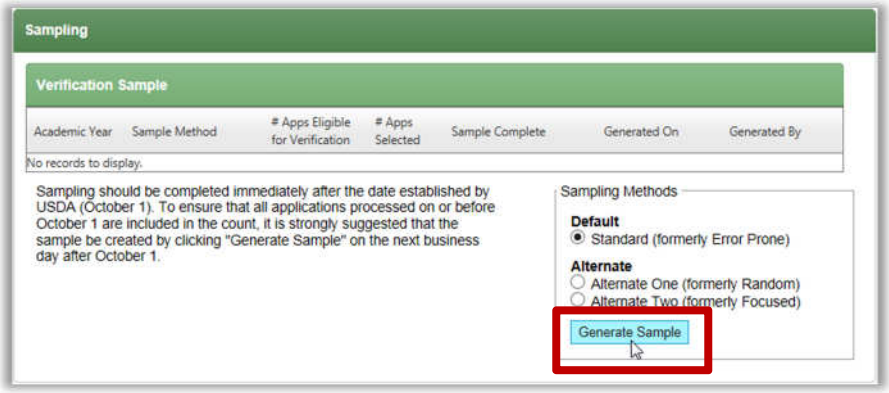
- All previous sample generations are shown in the **Verification Sample** list.
- **Sample Methods** is set to "Default" which is the Error Prone method. This is the most commonly used method. The other methods are not available unless previously approved by DPI.

Page Functions

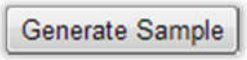
Field/Button	Description
Generate Sample	Click to "collect" a group of applications to be used in the verification process.
Replace Inactive Applications	Click to add applications to the list of applications to be included in verification when INELIGIBLE "Sampled" applications appear in the list; the INELIGIBLE applications are removed;

Table 6.2 Sampling Page Functions

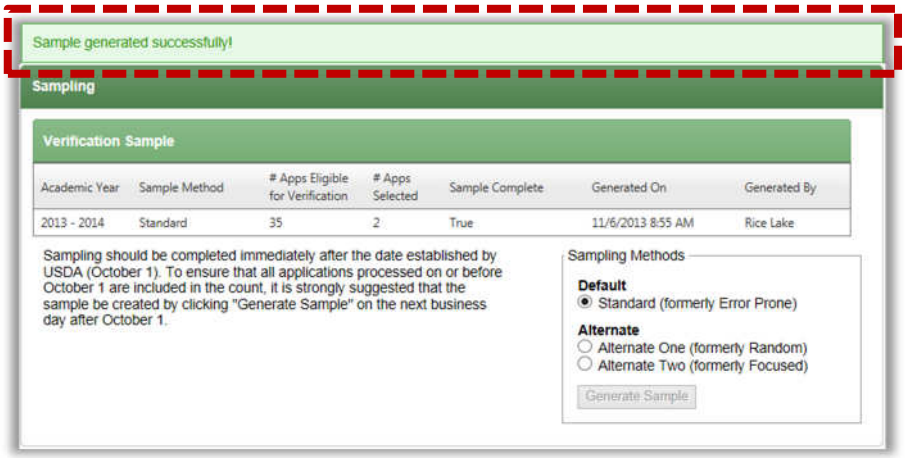
Generating a Sample Pool



On the *Sampling* page

- In the **Sampling Methods** group, choose a method, if needed.
- Click 

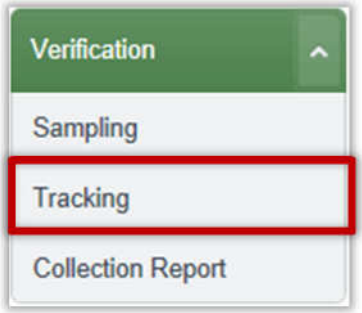
.



A success message appears.

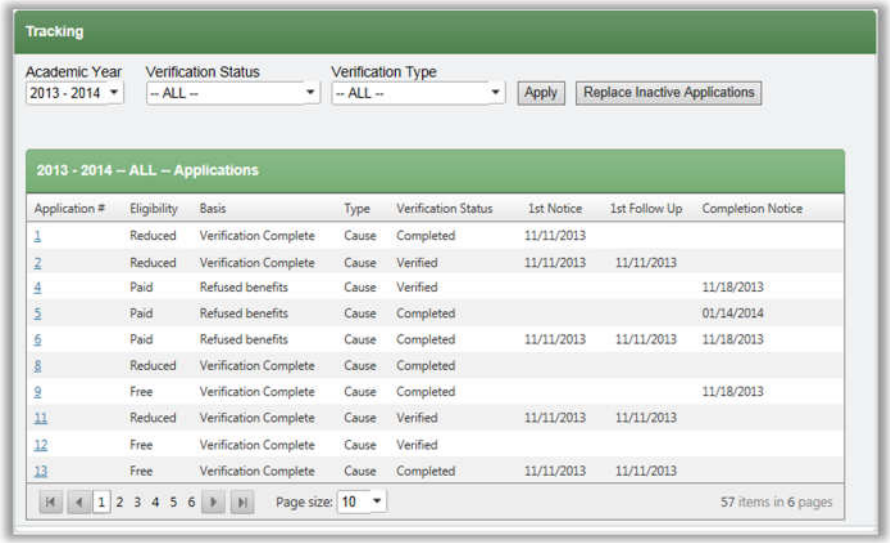
A listing for the completed sample appears in the **Verification Sample** list.

Tracking



Tracking monitors the verification process for all applications in the Sample pool or applications selected for Verification for Cause. Applications at different stages of the process can be displayed and corresponding notification sent.

When responses are received from the applicant, response information is recorded with the application. Responses can include uploading supporting documentation to the **Images** tab.



Application #	Eligibility	Basis	Type	Verification Status	1st Notice	1st Follow Up	Completion Notice
1	Reduced	Verification Complete	Cause	Completed	11/11/2013		
2	Reduced	Verification Complete	Cause	Verified	11/11/2013	11/11/2013	
4	Paid	Refused benefits	Cause	Verified			11/18/2013
5	Paid	Refused benefits	Cause	Completed			01/14/2014
6	Paid	Refused benefits	Cause	Completed	11/11/2013	11/11/2013	11/18/2013
8	Reduced	Verification Complete	Cause	Completed			
9	Free	Verification Complete	Cause	Completed			11/18/2013
11	Reduced	Verification Complete	Cause	Verified	11/11/2013	11/11/2013	
12	Free	Verification Complete	Cause	Verified			
13	Free	Verification Complete	Cause	Completed	11/11/2013	11/11/2013	

By default on the *Tracking* page

- **Academic Year** is set to the current school year.
- **Verification Status** is set to "-ALL-".
- **Verification Type** is set to "-ALL-".
- **Applications** list displays all applications that meet the default conditions.

Page Functions

Field/Button	Description
Apply	Click to display all applications in the **Applications** list that meet the selected search conditions.

Table 6.3 Tracking Page Functions

Verification Status

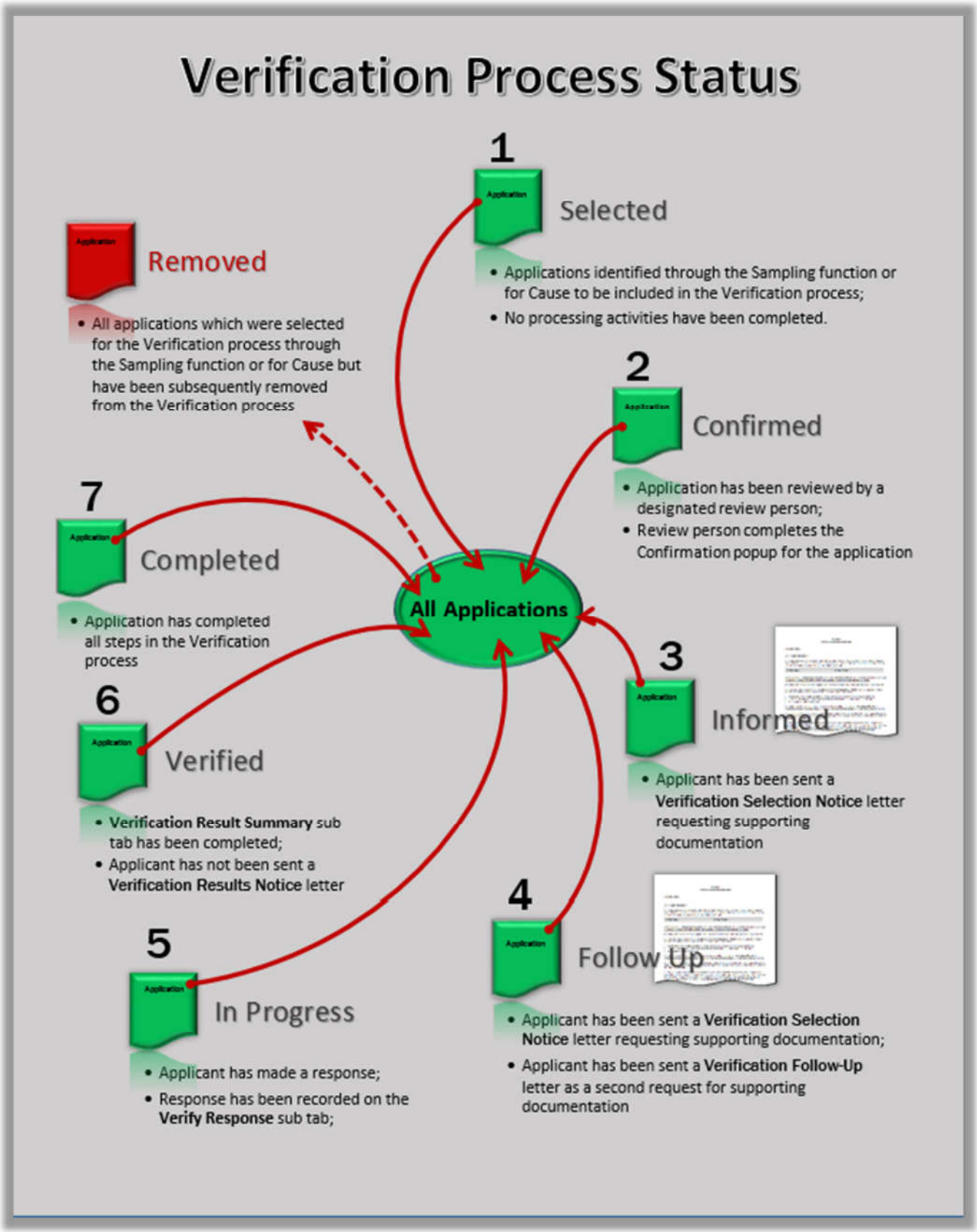
As the application moves through the verification process, the application Verification Status changes.

Initially all applications are labeled "Selected." When an application has completed the Verification process, the application status reflects "Verification Complete".

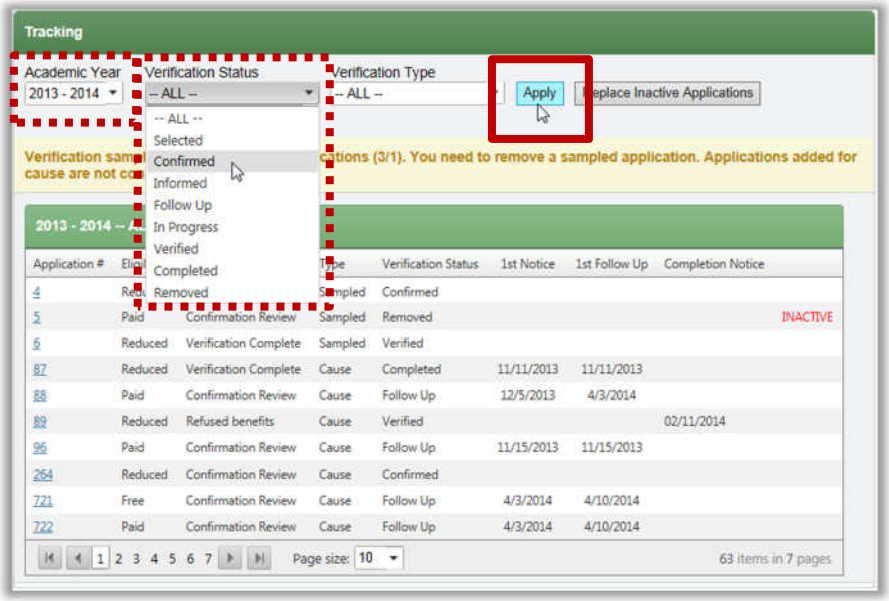
See the Verification Status table below for a description of each status.

Selection	Description
All	All applications in the verification process with any status; this includes applications selected ▪ Through the Sampling function, or ▪ By clicking [Add For Verification] on the **Application Info** tab in the *View Application* window to Verify for Cause.
Selected	All applications identified through the Sampling function or for Cause to be included in the Verification process; no processing activities have been completed.
Confirmed	All applications which have been reviewed by a designated review person and a Confirmation Review has been recorded as performed.
Informed	All applications that have been sent a **Verification Selection Notice** letter requesting supporting documentation.
Follow Up	All applications that have been sent one or more Verification Follow-Up letters.
In Progress	All applications for which a response from the applicant has been recorded on the **Verify Response** sub tab of the **Verification Response** tab in the *View Application* window; however, more information is needed before the **Verification Result Summary** sub tab can be completed; multiple responses can be recorded on the **Verify Response** sub tab.
Verified	All applications that have a recorded result on the **Verification Result Summary** sub tab of the **Verification Response** tab in the *View Application* window.
Completed	All applications that have been sent a Verification Results letter.
Removed	All applications selected to include in the Verification process but have been removed.

Table 6.4 Verification Status Codes

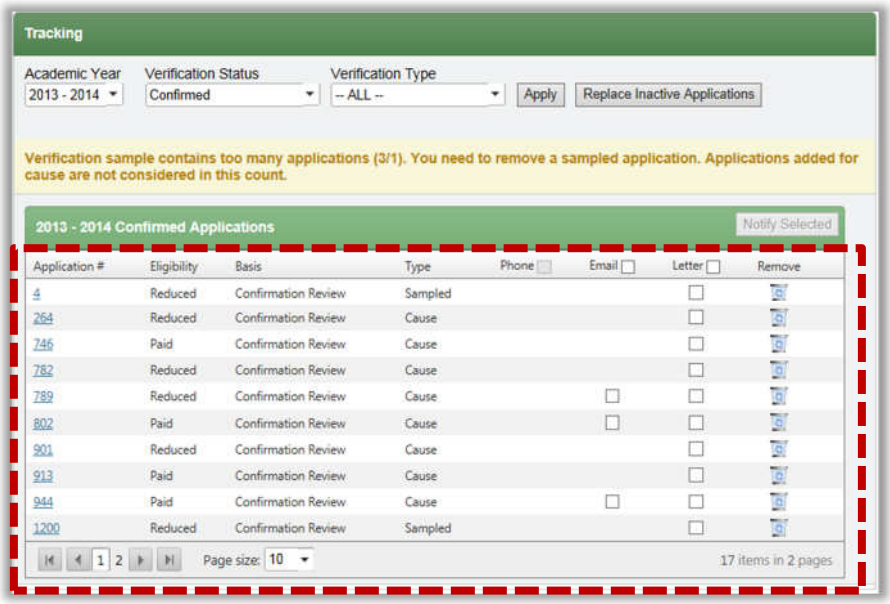

Verification Process Status
1
Selected
• Applications identified through the Sampling function or for Cause to be included in the Verification process;
• No processing activities have been completed.
Removed
• All applications which were selected for the Verification process through the Sampling function or for Cause but have been subsequently removed from the Verification process
2
Confirmed
• Application has been reviewed by a designated review person;
• Review person completes the Confirmation popup for the application
7
Completed
• Application has completed all steps in the Verification process
All Applications
3
Informed
• Applicant has been sent a Verification Selection Notice letter requesting supporting documentation
6
Verified
• Verification Result Summary sub tab has been completed;
• Applicant has not been sent a Verification Results Notice letter
4
Follow Up
• Applicant has been sent a Verification Selection Notice letter requesting supporting documentation;
• Applicant has been sent a Verification Follow-Up letter as a second request for supporting documentation
5
In Progress
• Applicant has made a response;
• Response has been recorded on the Verify Response sub tab;

Displaying Applications by Verification Status



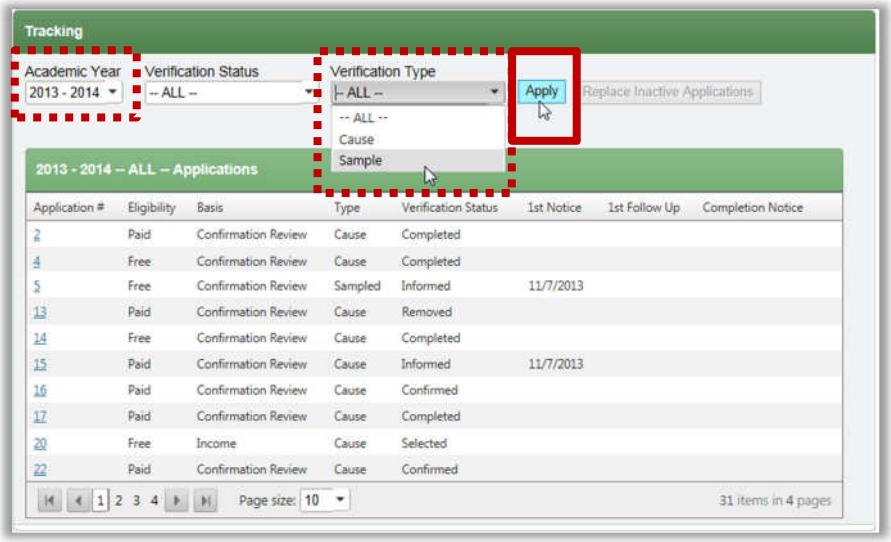
On the *Tracking* page

- Select an **Academic Year** if needed.
- Select a **Verification Status**.
- Click .



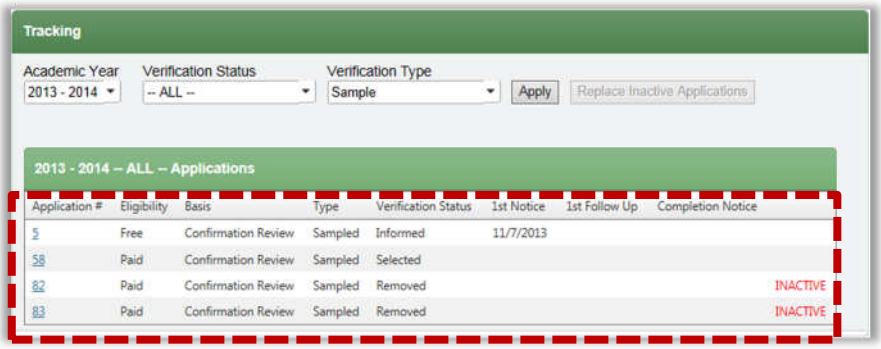
All applications that meet the selected search conditions are shown in the **Applications** list.

Displaying Applications by Verification Type



On the *Tracking* page

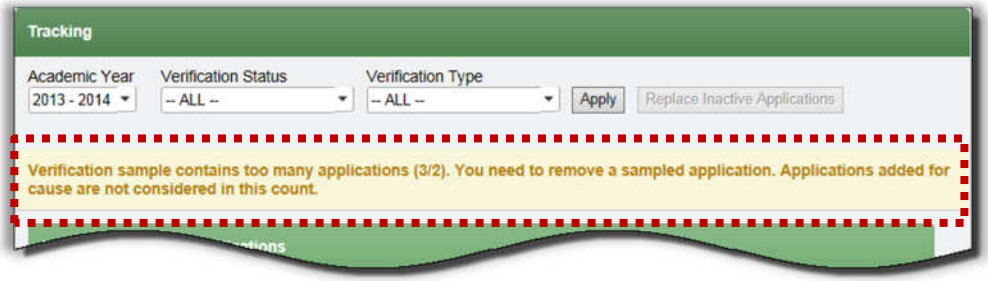
- Select an **Academic Year** if needed.
- Select a **Verification Type**.
- Click Apply .

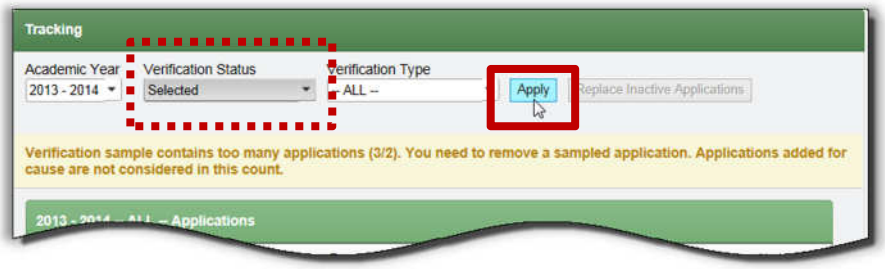


All applications that meet the selected search conditions are shown in the **Applications** list.

Removing an Application from the Sample Pool

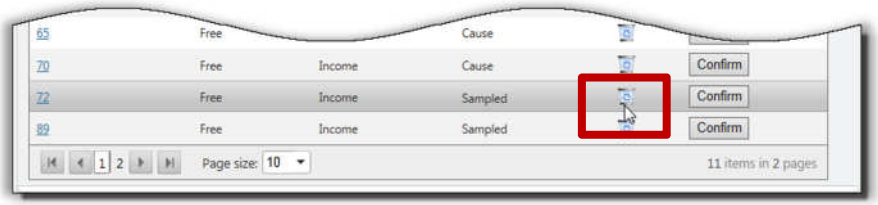
If applications are added for Verification after the Sampling pool has been generated, a message appears to let you know that too many applications are in the pool. "Extra" sampled applications must be removed.





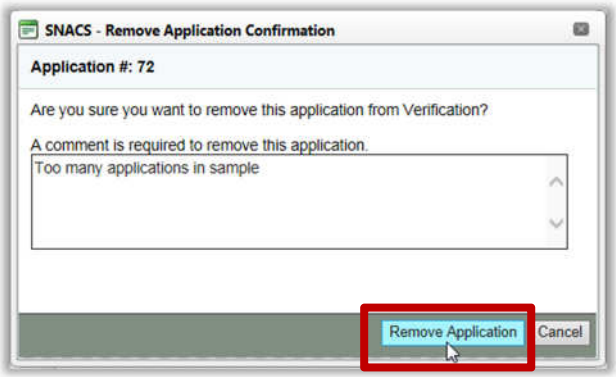
On the *Tracking* page

- Select "Selected" in **Verification Status**.
- Click Apply .



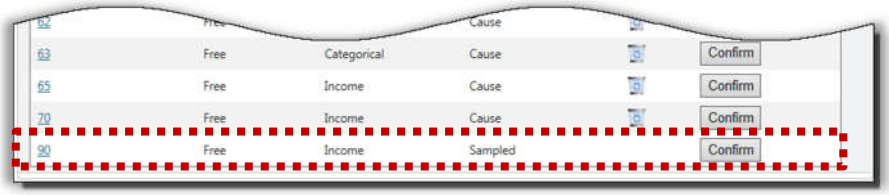
In an application listing

- Click **Delete** ( ).



In the **Remove Application Confirmation** popup

- Enter comment text to explain reason for the removal.
- Click Remove Application .



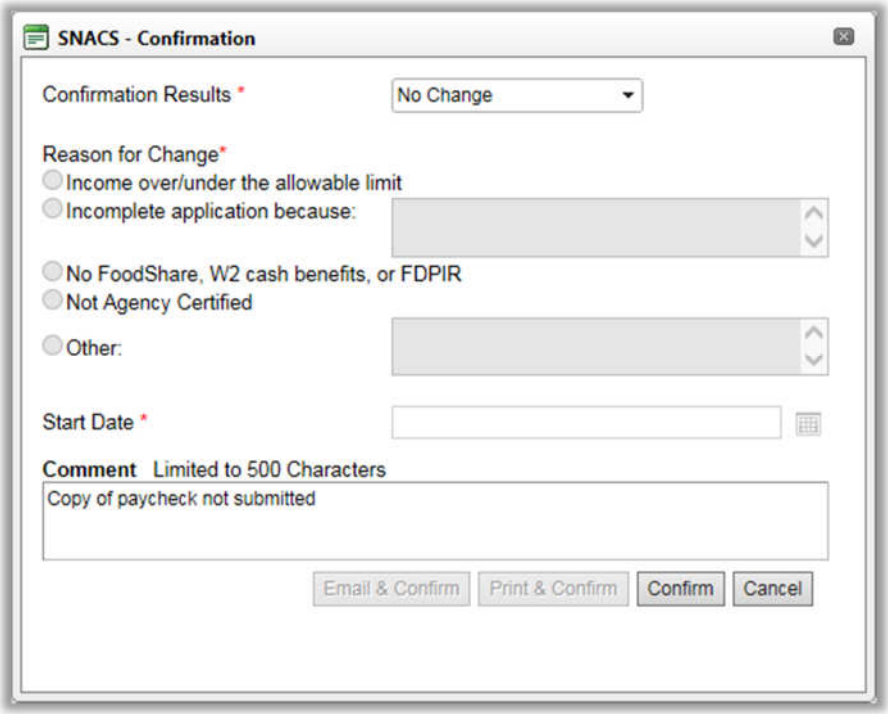
When the number of applications marked "Sampled" reaches the correct number for the generated Sample pool, the **Delete** icon is no longer available for Sampled applications.

Confirming an Application

When an application has been reviewed, the application is confirmed. The available options in the Confirmation popup depend on the selected **Confirmation Results**. Completing confirmation for an application changes the application status to "Confirmation Review."

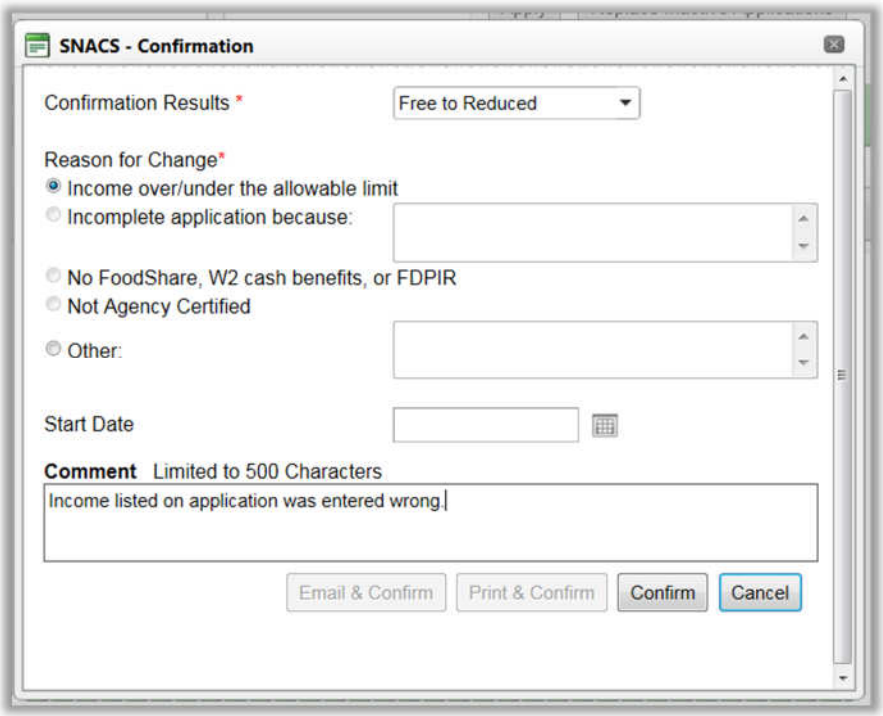
When "No Change" is selected in **Confirmation Results**, no options are available. **Comments** may be entered, but are not required.

No notification is required therefore the only available actions are to either Confirm the results, or to Cancel the confirmation.



When "Free to Reduced" is selected in **Confirmation Results**, two **Reason for Change** options are available. **Comments** are optional.

No notification is required therefore the only available actions are to either Confirm the results, or to Cancel the confirmation.



✪ Per USDA regulations, if the Confirmation is Free to Reduced, the application remains in Verification and the eligibility is not changed until the Verification process is completed.

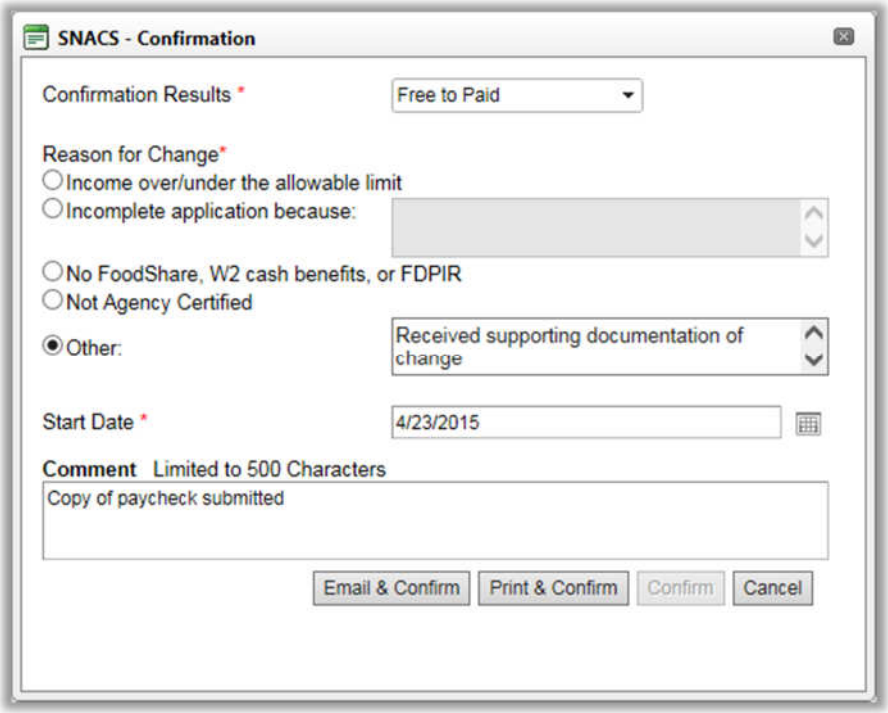
When "Free to Paid" is selected in **Confirmation Results**, all **Reason for Change** options are available and one must be selected. A **Start Date** and **Comments** must be selected/entered.

Notification is required, therefore the available actions include:

Email & Confirm when an email address is provided in the student record, and/or

Print & Confirm when no email address is provided.

Either or both types of notification can be sent.



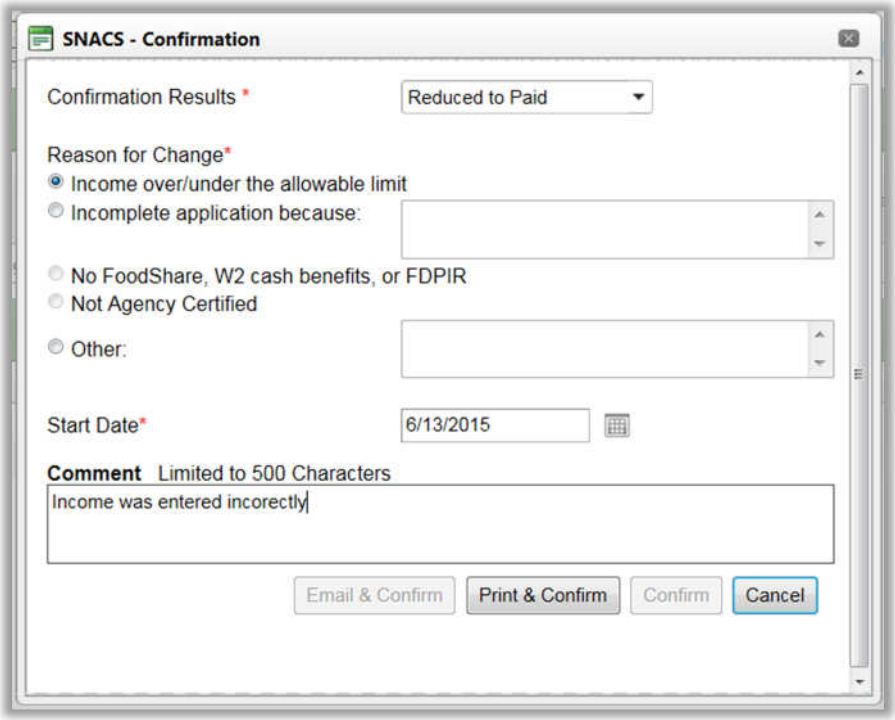
When "Reduced to Paid" is selected in **Confirmation Results**, only two **Reason for Change** options are available and one must be selected. A **Start Date** and **Comments** must be selected/entered.

Notification is required, therefore the available actions include:

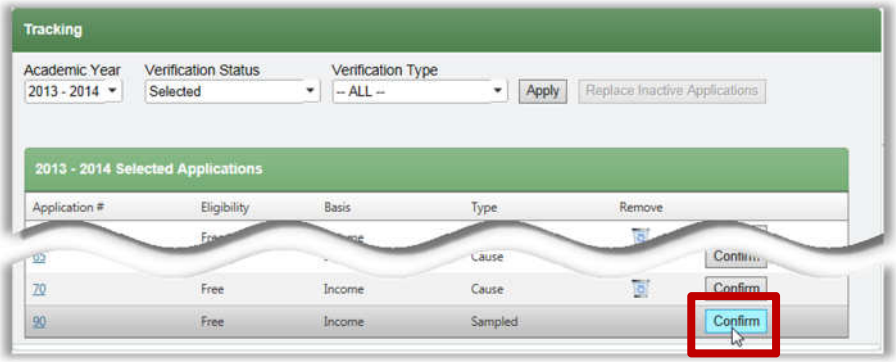
Email & Confirm when an email address is provided in the student record, and/or

Print & Confirm when no email address is provided.

Either or both types of notification can be sent.

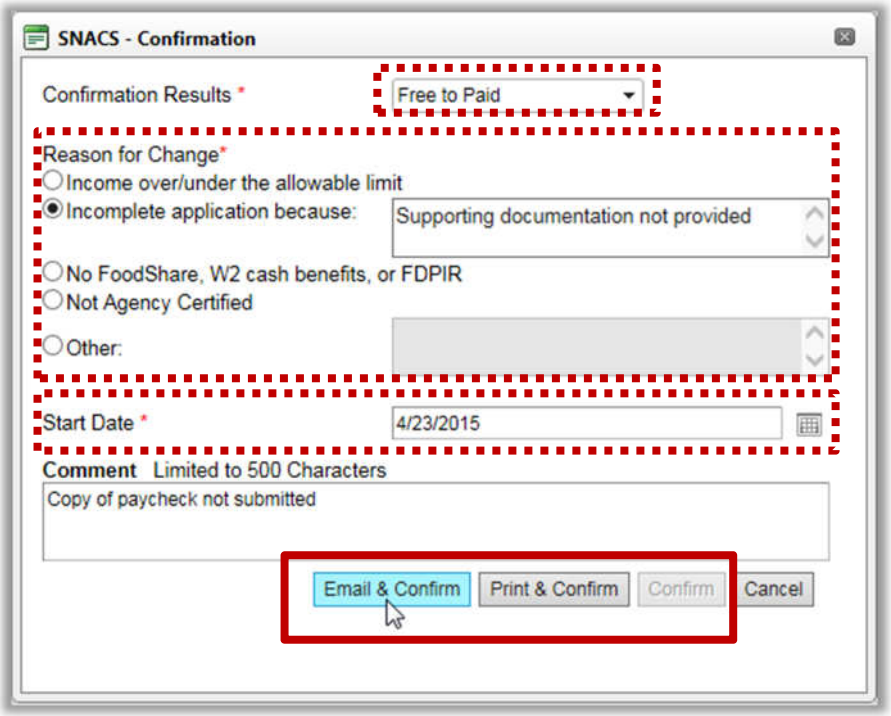


To confirm an application



On the *Tracking* page

- Display a list of "Selected" applications.
- Click Confirm .



In the **Confirmation** popup

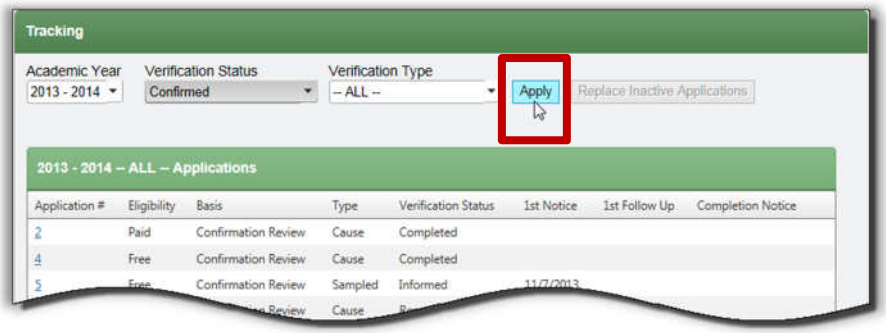
- Select a **Confirmation Results** selection.
- Select a **Reason for Change** (if available) and enter text (if required) to describe the reason when the corresponding option is chosen.
- If Free or Reduced to Paid, select a **Start Date** for the new eligibility.
- Enter **Comment** text.
- Click a confirmation button.

The application is removed from the list.

Sending 1st Notification

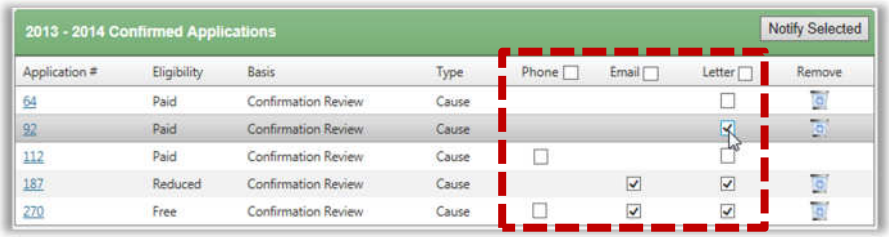
Applicants are provided twice with notification of the verification selection—1st Notice and 1st Follow Up. Notification is provided through email or with a printed letter. First notification is sent after the Confirmation Review is performed. Sending notification changes the application status to "Informed."

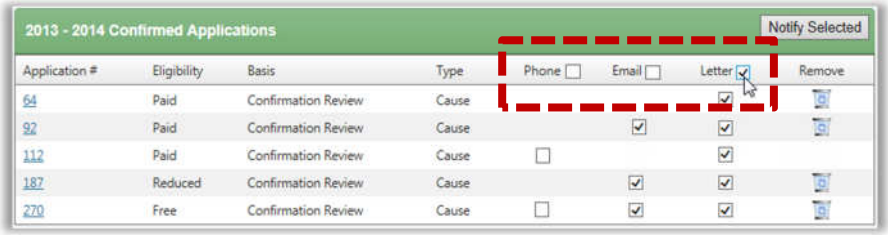
Applications that include an email address can be notified by email as well as by letter.



On the *Tracking* page

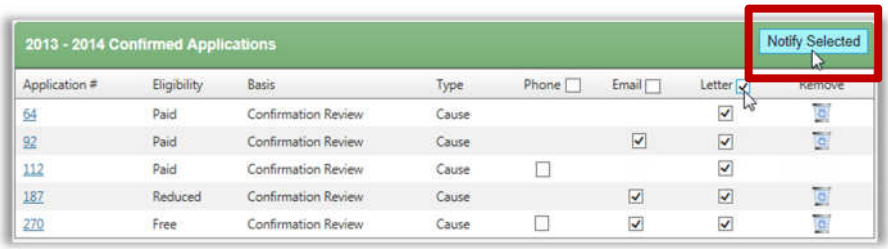
- Select "Confirmed" in **Verification Status**.
- Click Apply .





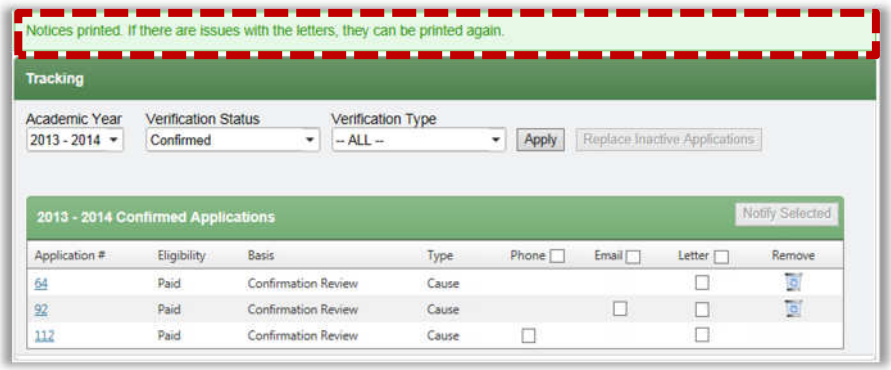
Select one or more methods of notification by either

- Selecting the desired notification type in individual application listings, or
- Selecting the desired notification type in the column header to select all applications.



When all applications to receive notification have been identified

- Click Notify Selected .



A print message appears.

All applications selected to receive notification are removed from the list.

Sending Follow-Up Notification

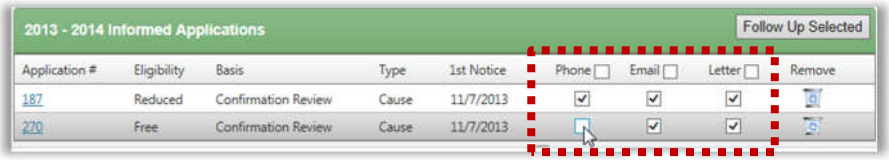
Follow Up notification is sent when no response is received from the applicant within the defined number of days after the 1st notification has been sent.

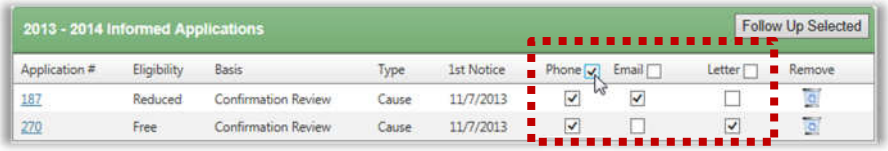
Applications that include an email address and/or phone number can be notified by those methods as well as by letter.

To view all informed applications

- Select "Informed" in **Verification Status**.
- Click

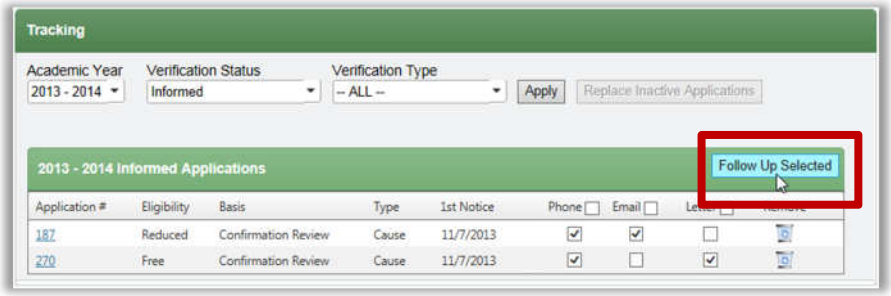
.





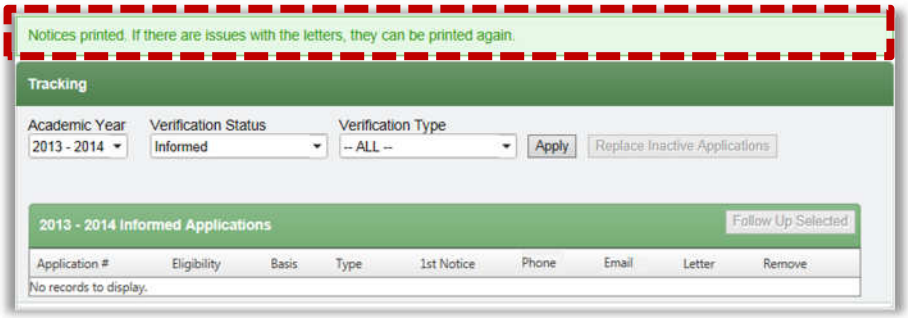
Select one or more methods of notification by either

- Selecting the desired notification type in individual application listings, or
- Selecting the desired notification type in the column header to select all applications.



When all applications to receive notification have been identified

- Click **Follow Up Selected**.



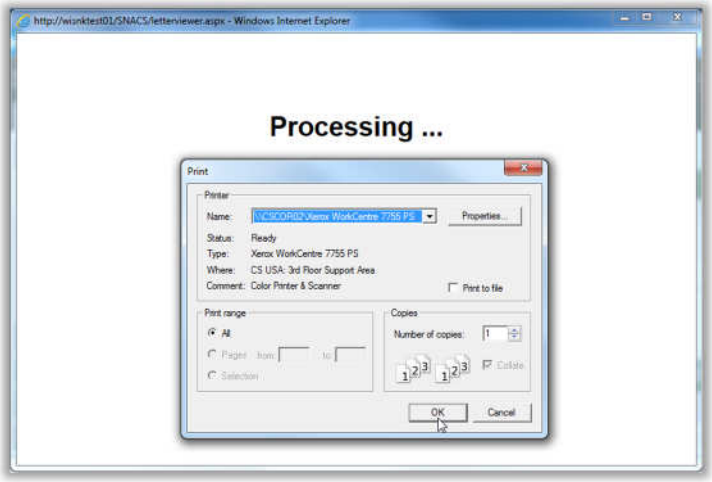
A print message appears.

All applications selected to receive notification are removed from the list.

Processing Notification

After selecting the type of notification to be used for a batch or application, clicking Notify Selected or Follow Up Selected starts notification processing. Responses for each type depends on the selected type.

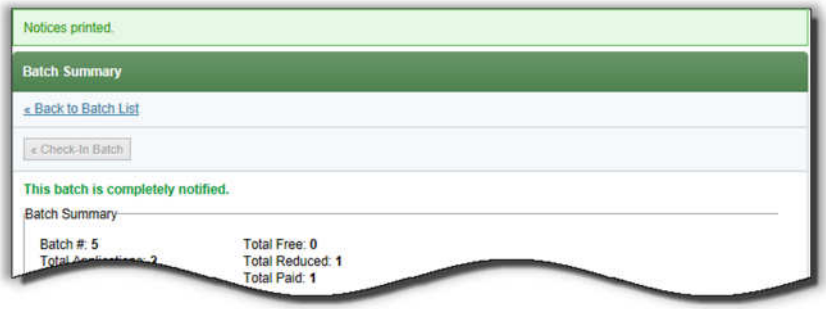
Letter Notification



Letter notification appears with the Print popup.

- Click OK to send the letter(s) to the printer.

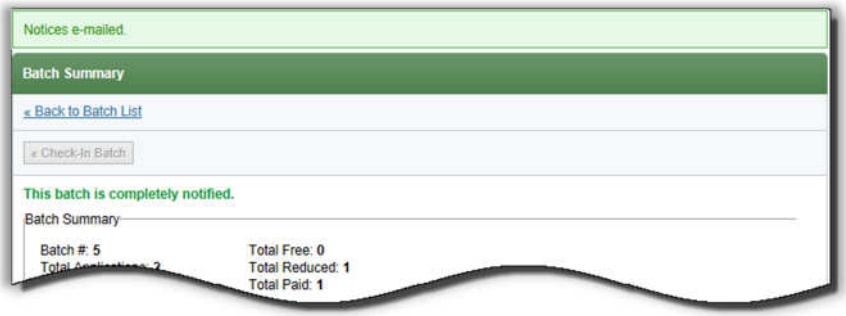
Letter notification is complete when the letters are sent to the printer.



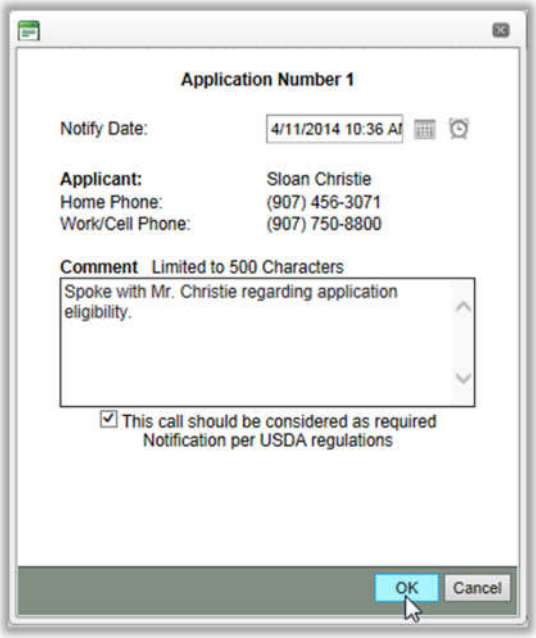
A print message appears on the Batch Summary page.

Email Notification

Email notification does not display interim messages. An "emailed" message appears on the Batch Summary page when email message processing is complete.

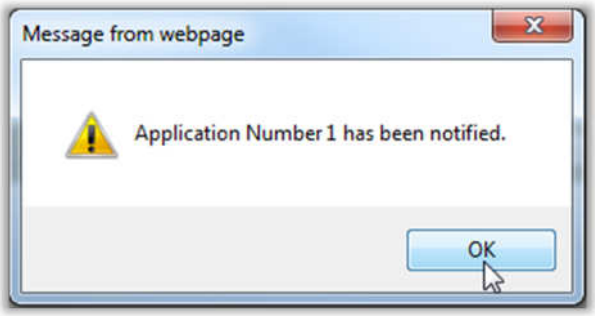


Phone Notification



Phone notification appears with the Phone Notification popup.

- Change the **Notify Date** (and/or time) if needed.
- Enter a **Comment**.
- Clear **This call should be considered as required Notification per USDA regulations** if needed.
- Click OK .



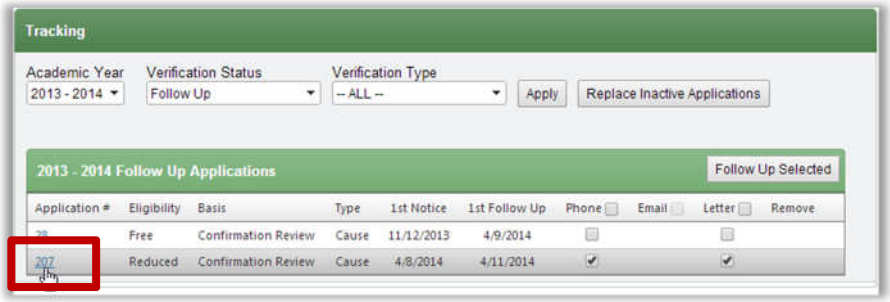
Phone notification is complete when the popup confirmation message appears.

- Click OK .

Recording a Verification Response

When the applicant responds to the request for verification, the response is recorded on the **Verify Response** sub tab of the **Verification Response** tab in the *View Application* window. Multiple responses maybe recorded, if needed. Recording a Verification Response changes the application status to "In Progress".

Note: Only current year applications can be updated. Applications from prior Academic Years cannot be changed.

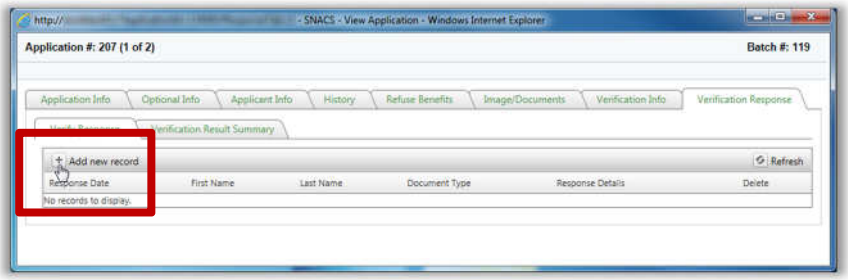


To view all applications that are waiting for a response

- Select "Follow Up" in **Verification Status**.
- Click Apply .

In the list of applications

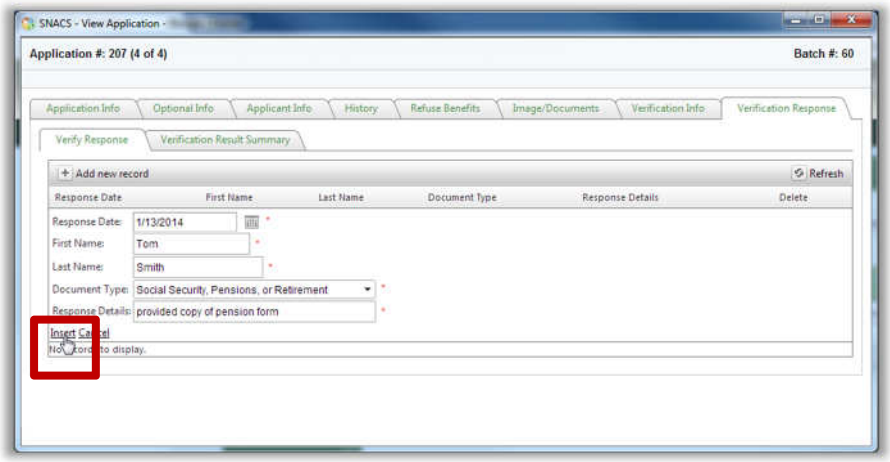
- Click the **Application #** link in an application listing.



The *View Application* window opens.

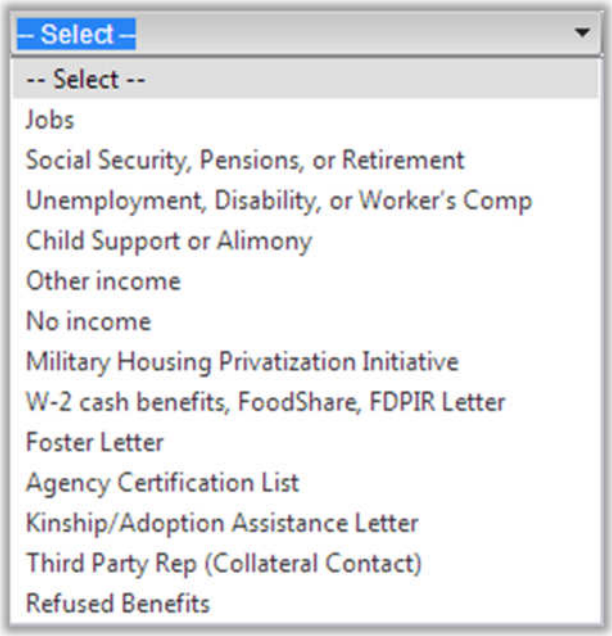
On the **Verify Response** tab

- Click **Add new record** to display a response form.



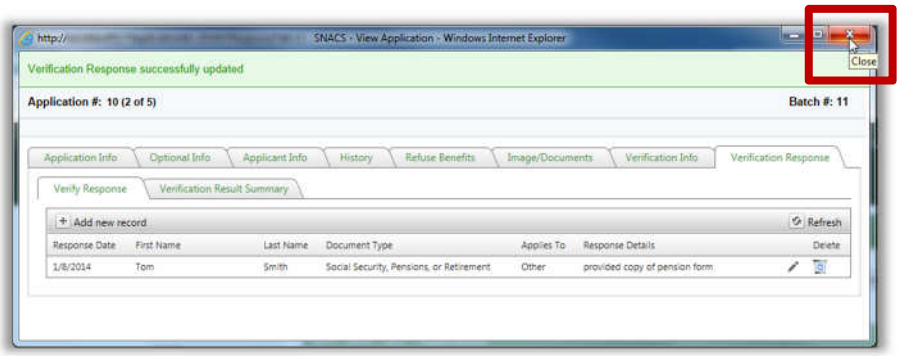
In the response form

- Select a **Response Date**, if needed.
- Enter the respondant's **First Name.**
- Enter the respondant's **Last Name**.
- Select a **Document Type** (see the list to the left).
- Enter information in **Response Details**, if needed.



- Click **Insert**.

Thirteen (13) document types are available for selection.



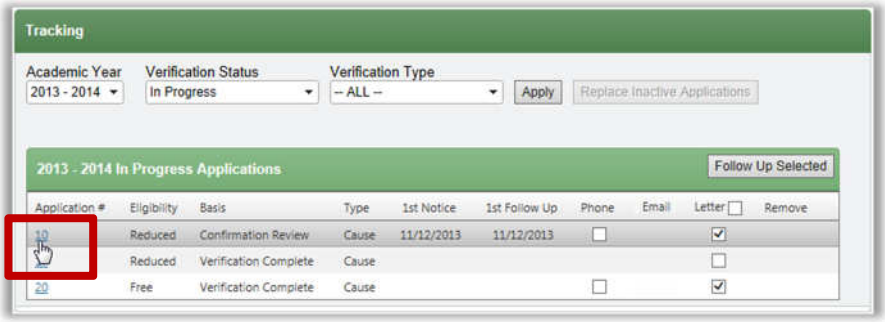
An update success message appears. The new response appears in the response list.

- Close the window.

Recording the Verification Result Summary

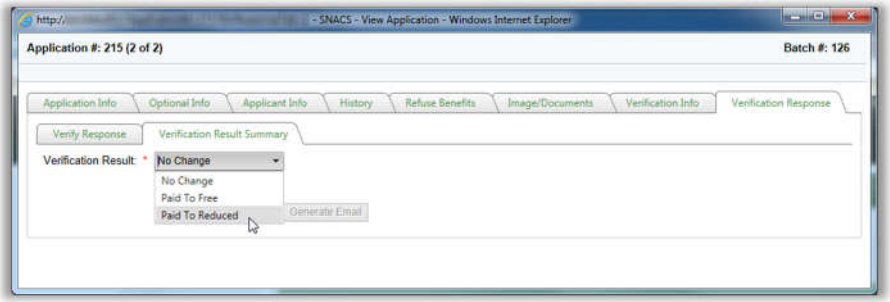
When the verification for an application has been determined, the result is recorded on the application. Saving the Verification Result changes the application status to "Verification Complete." No new responses or results can be recorded.

Note: Only current year applications can be updated. Applications from prior Academic Years cannot be changed.



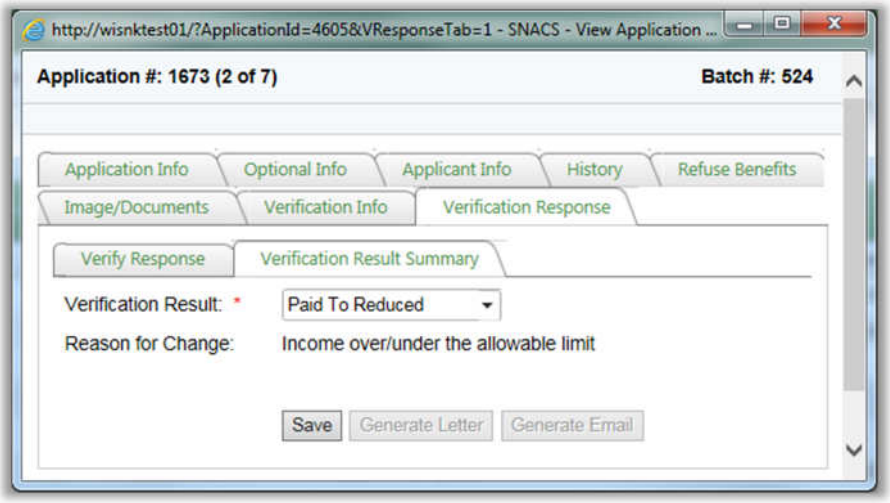
On the *Tracking* page

- Display all applications that are "In Progress."
- Click an **Application #** link in an application listing.



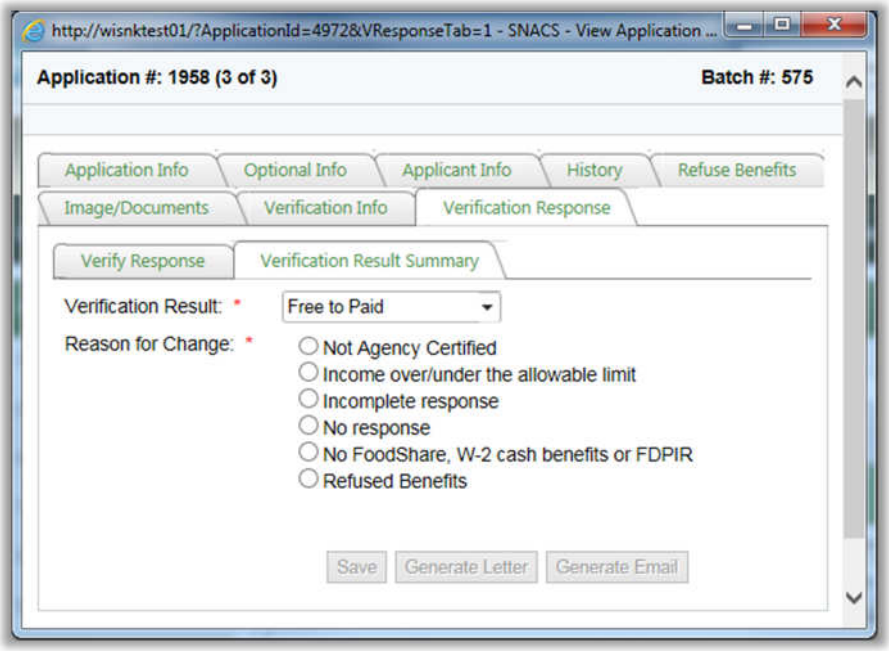
In the **View Application** window

- Select the **Verification Result** from the available selections.

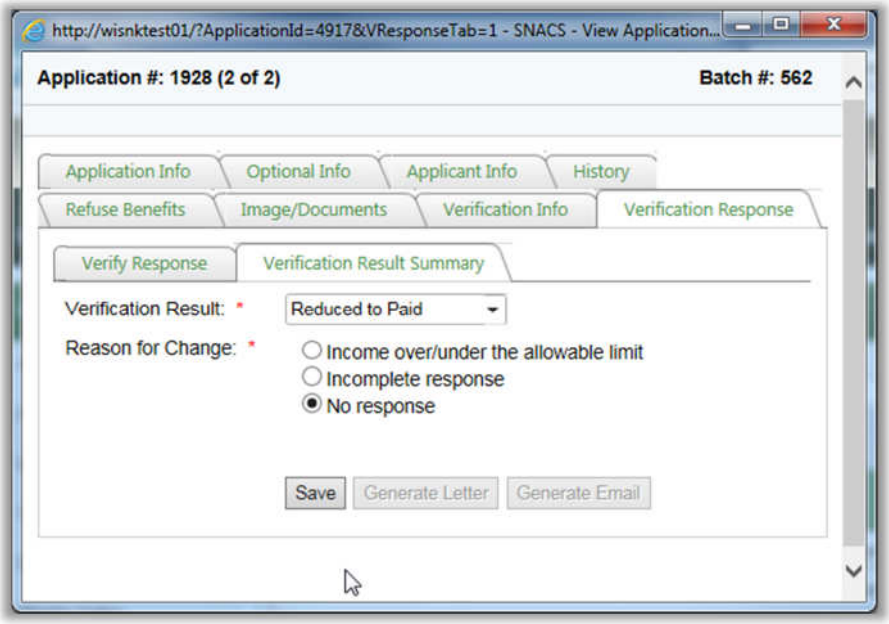


When you select a Verification Result, a **Reason for Change** may appear.

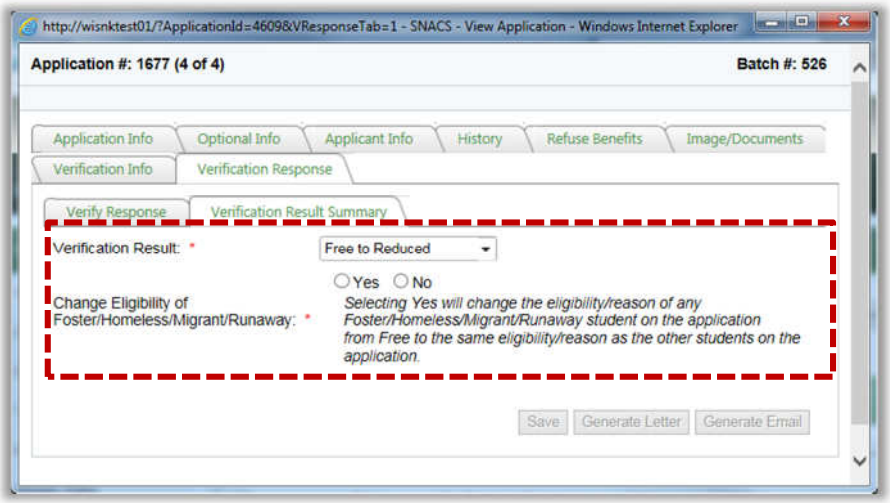
In this first example, no further selections are required before saving the verification result.



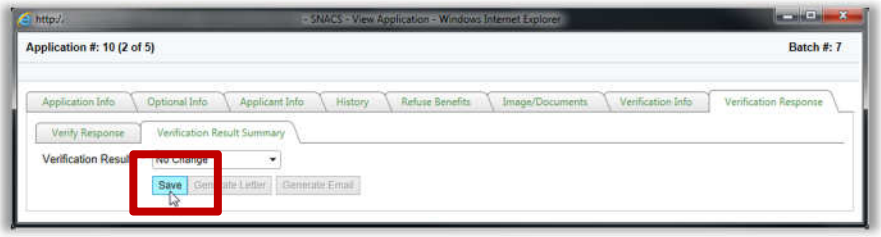
In this second example, multiple **Reason for Change** listings are provided and you must select one reason before saving the verification result.



The Save button becomes available when a **Reason for Change** is selected.

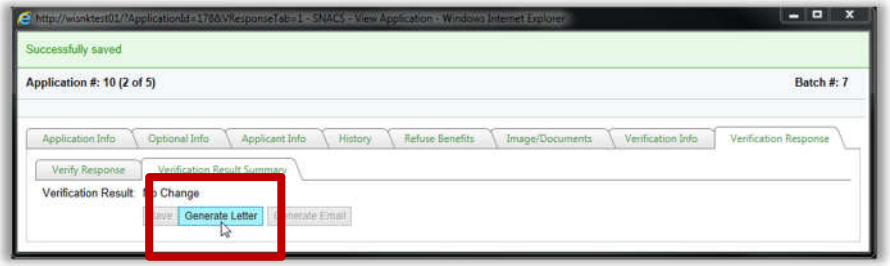


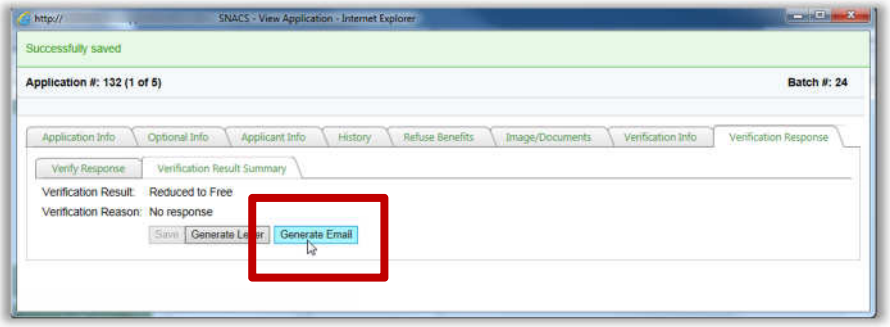
When foster, migrant, runaway, and/or homeless children are included on an application, their eligibility/reason can also be changed to match the status of other children on the application or left as is. A "Yes" or "No" response is required before the verification result can be saved.



In the **View Application** window

- Click Save .



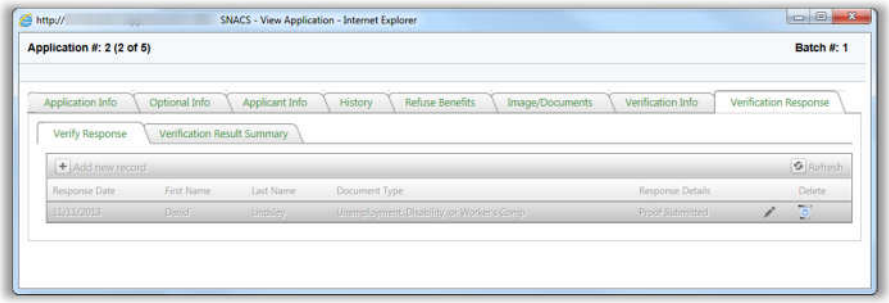


A success message appears.

To generate notification after saving

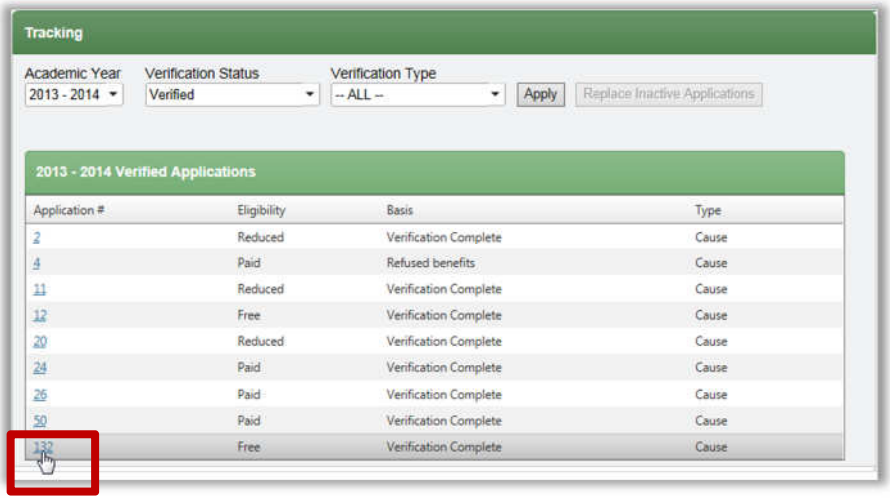
- Click Generate Letter to print a letter.
- Click Generate Email to send an email message.

Note: One or both Generate buttons may be available. The Generate Email button is available only when the applicant included an email address with the application.



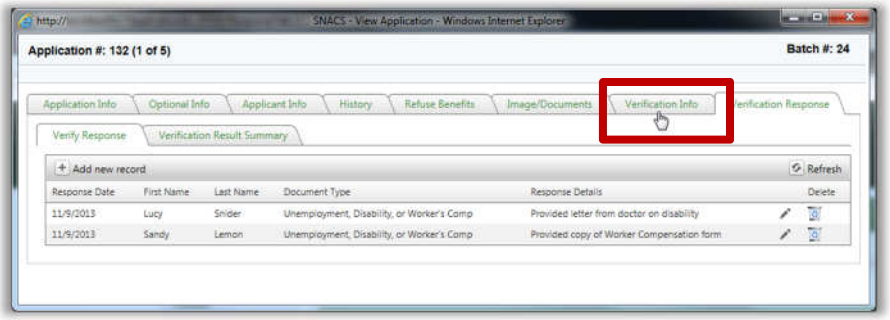
Note: After saving the Verification Result, all functions on the **Verify Response** sub tab become unavailable.

Viewing Application Verification Information



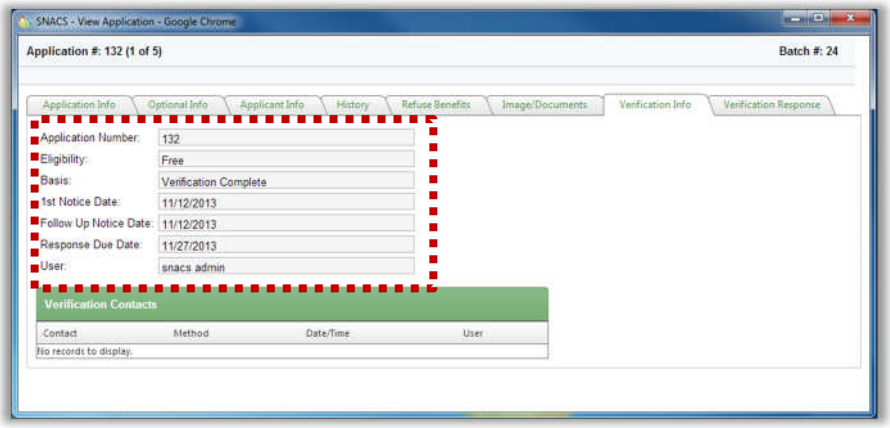
On the *Tracking* page

- Click an **Application #** link in an application listing.



In the *View Application* window

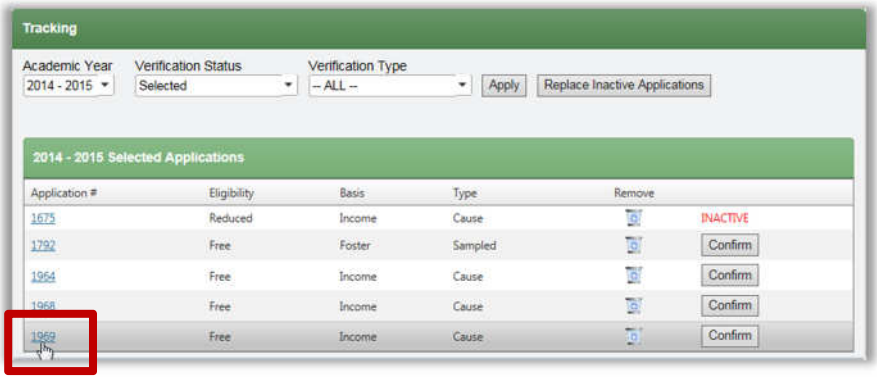
- Click the **Application Info** tab.



The current verification information for the application is listed.

Refusing Benefits

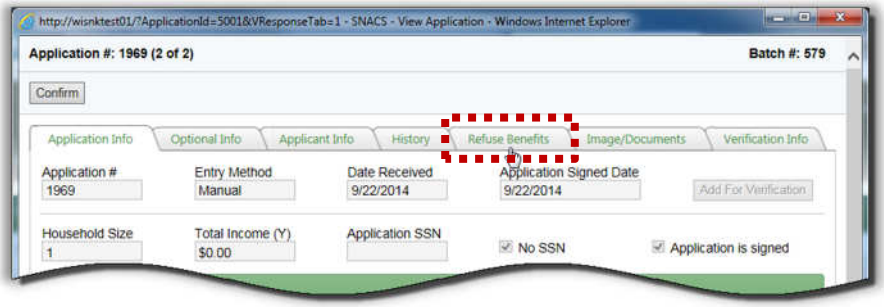
An applicant may choose to refuse assigned benefits. This process is completed in the *View Application* window on the **Refuse Benefits** tab.



On the *Tracking* page

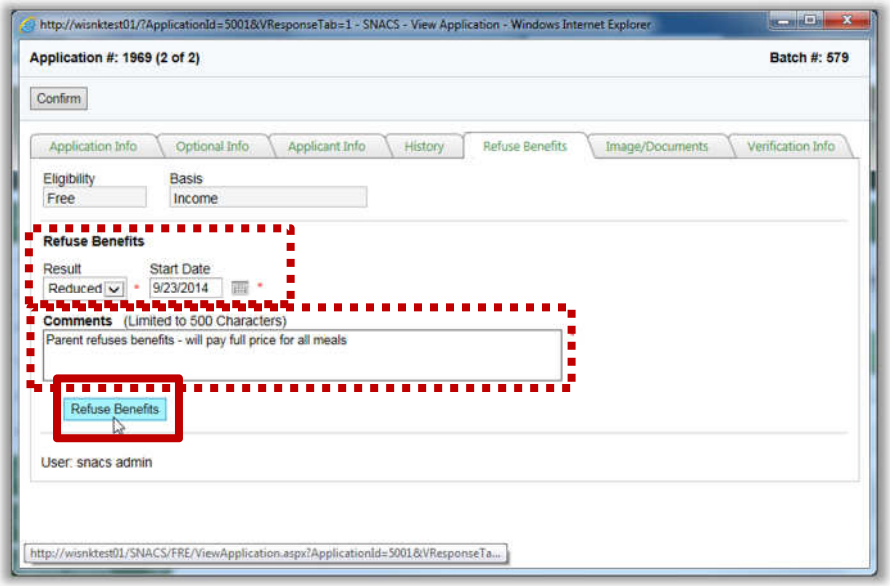
- Click an **Application #** link in an application listing.

(This can also be done by accessing the *View Application* page by clicking on the **Application #** link in Master Index.)

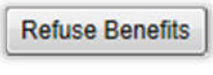


In the **View Application** popup

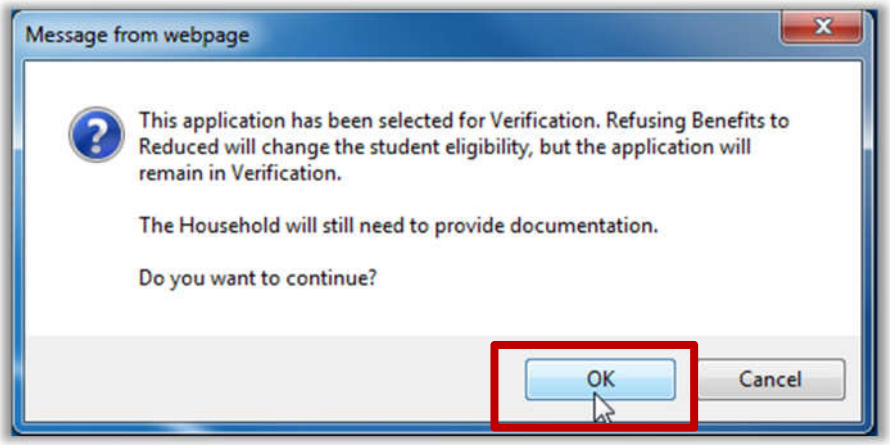
- Select the **Refuse Benefits** tab.



On the **Refuse Benefits** tab

- Select a **Result.**
- Select a **Start Date** on which the new Eligibility is to begin.
- Enter comment text in **Comments**.
- Click 

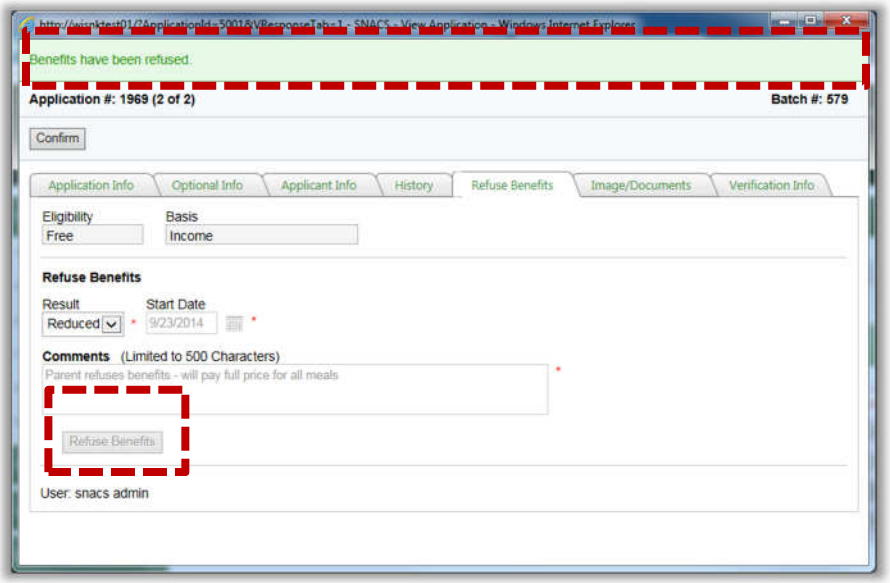
.



In the confirmation popup

- Click OK .

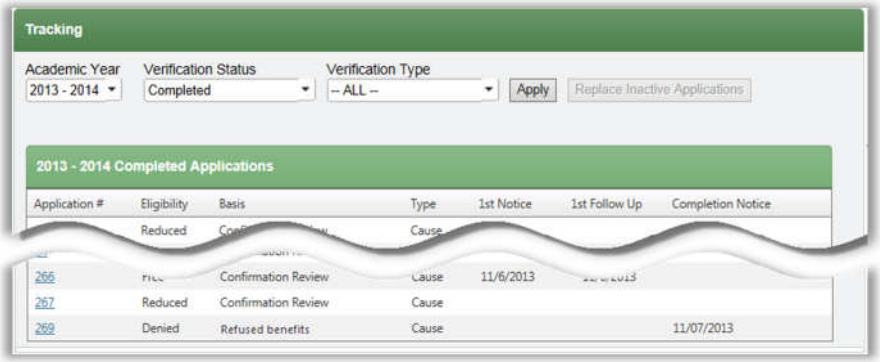
✪ **Note:** If the Refusal is to Paid, the application can be removed from Verification.



A benefits refusal message appears.

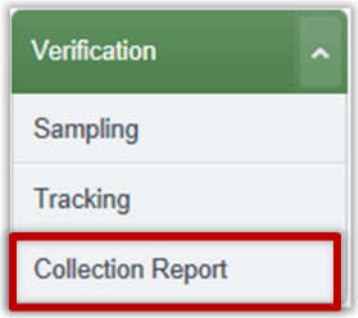
The Refuse Benefits button is no longer available.

The application is given the Verification Status of "Completed".

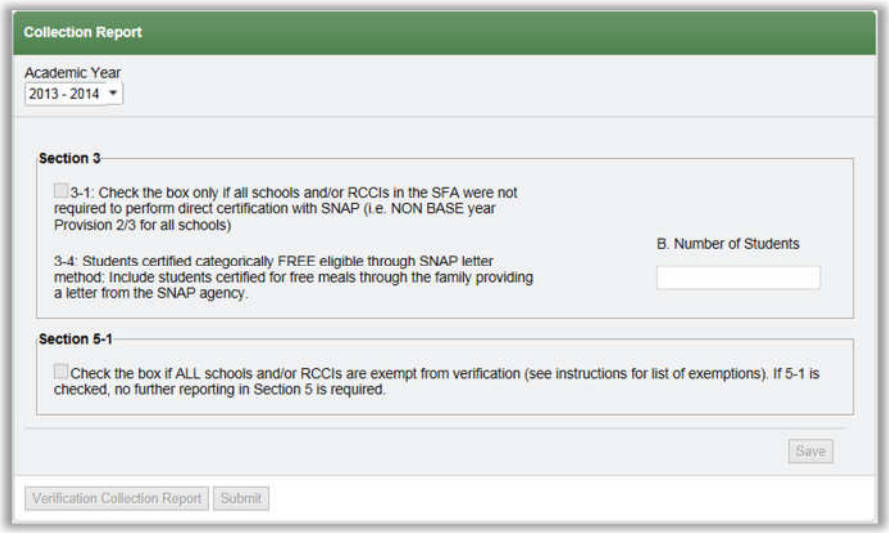


The date of refusal is listed in the **Completion Notice** column when viewing a list of all Completed applications.

Collection Report



Collection Report collects and submits data about the verification process for an SFA.



By default on the *Collection Report* page

- **Academic Year** is set to the current school year.
- Sections shown are relevant to the types of schools in your SFA, i.e., if you have any RCCIs in your SFA you will see Section 1; whereas if no RCCIs exist in your SFA, Section 1 is not included in the display.
- No default selections or entries are made.

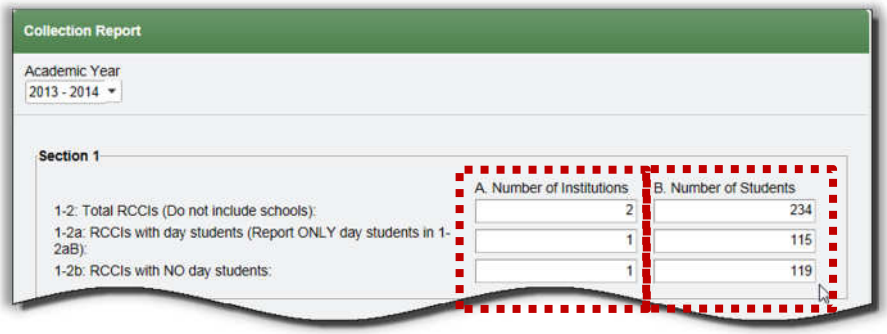
Page Functions

Field/Button	Description
Save	Click to save selections made on the *Collection Report* page.
Verification Collection Report	Click to generate and display the compiled Verification Collection report.
Submit	Click to send the completed Verification Collection report to DPI.

Table 6.5 Collection Report Page Functions

Completing Collection Report Data

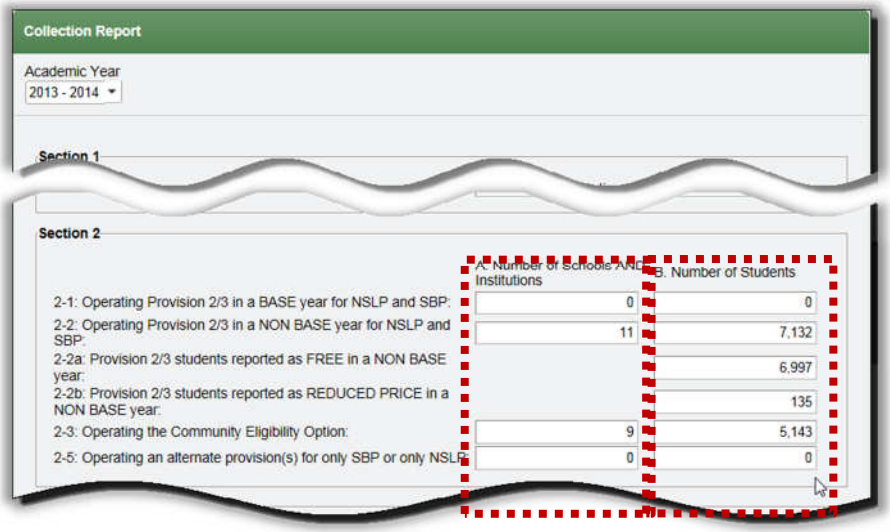
Section 1



If your SFA includes one or more RCCIs (Residential Child Care Institutions), Section 1 is shown and you must provide totals for **A. Number of Institutions** and **B. Number of Students**.

- Enter totals for item 1-2.
- Enter totals for item 1-2a, if appropriate.
- Enter totals for item 1-2b, if appropriate.

Section 2



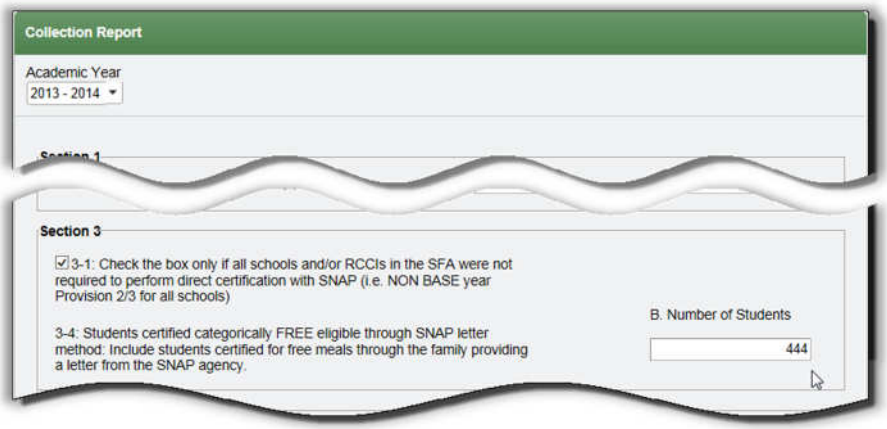
If your SFA includes one or more schools operating under

- Provision 2/3, or
- Community Eligibility Provision (CEP), or
- An alternate provision(s) for SBP or NSLP

Section 2 is shown on the *Collection Report* page and you must provide totals for **A. Number of Schools AND Institutions**, and **B. Number of Students.**

- Enter totals for item 2-1 through 2-5, as appropriate.

Section 3



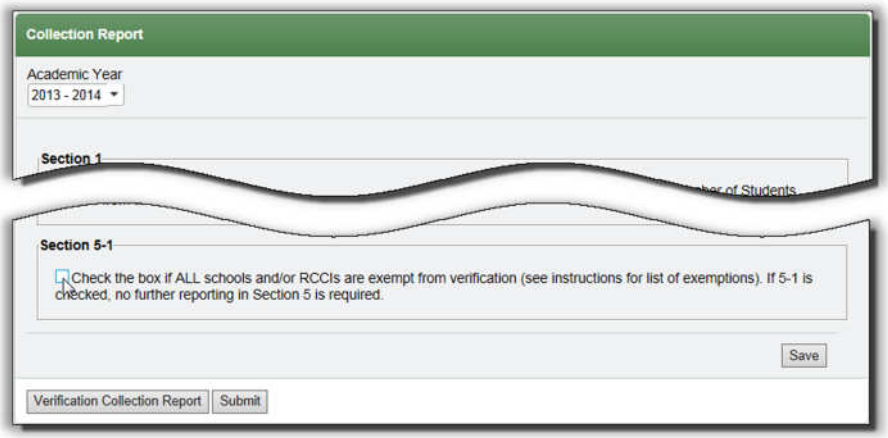
Section3 is shown for all SFAs.

- Select 3-1, if appropriate.
- Enter the total number of students in 3-4, if appropriate.

Section 4

Data for Section 4 is completed for you by SNACS.

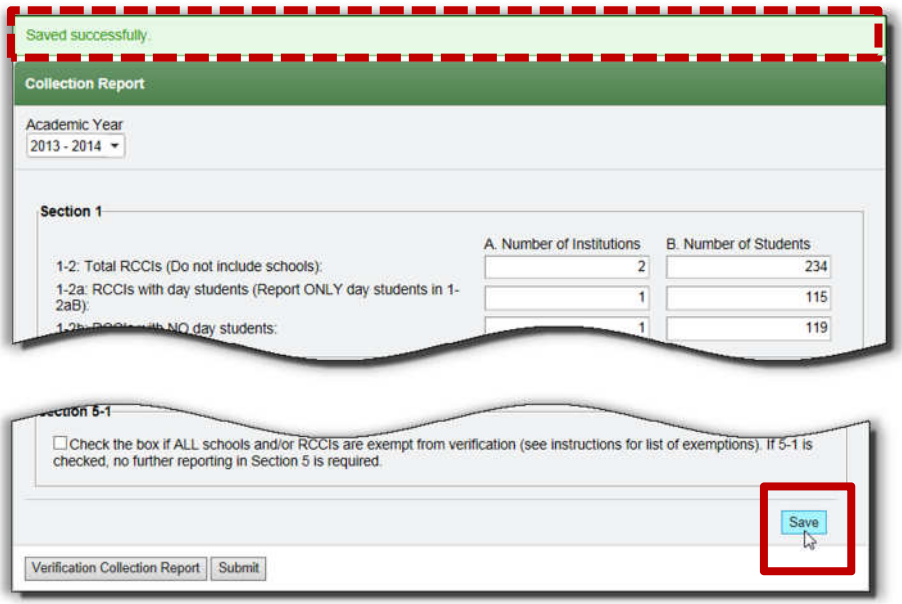
Section 5



Section 5 is shown for all SFAs.

- Select the checkbox if appropriate for your SFA.

Saving



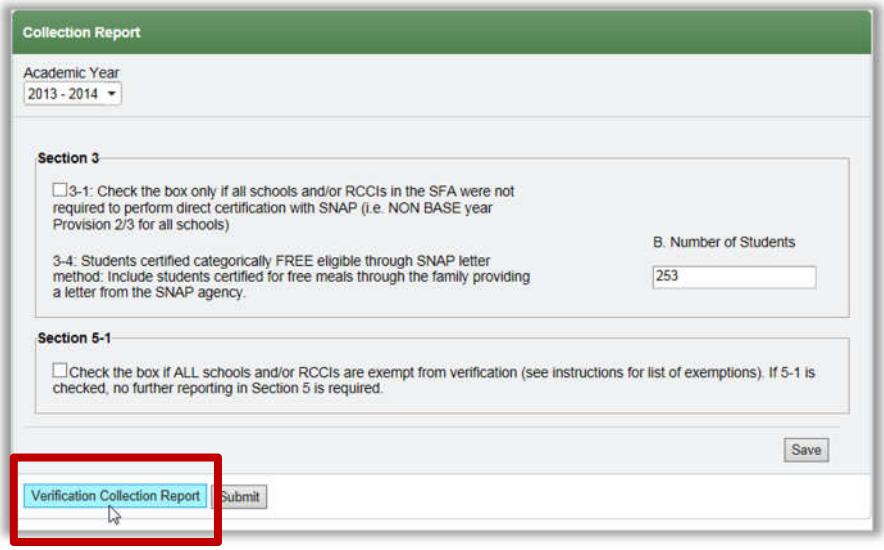
Entered data can be saved as often as needed. All data does not have to be complete to save the data.

To save entered data

- Click **Save** .

A save success message appears.

Generating and Printing a Collection Report



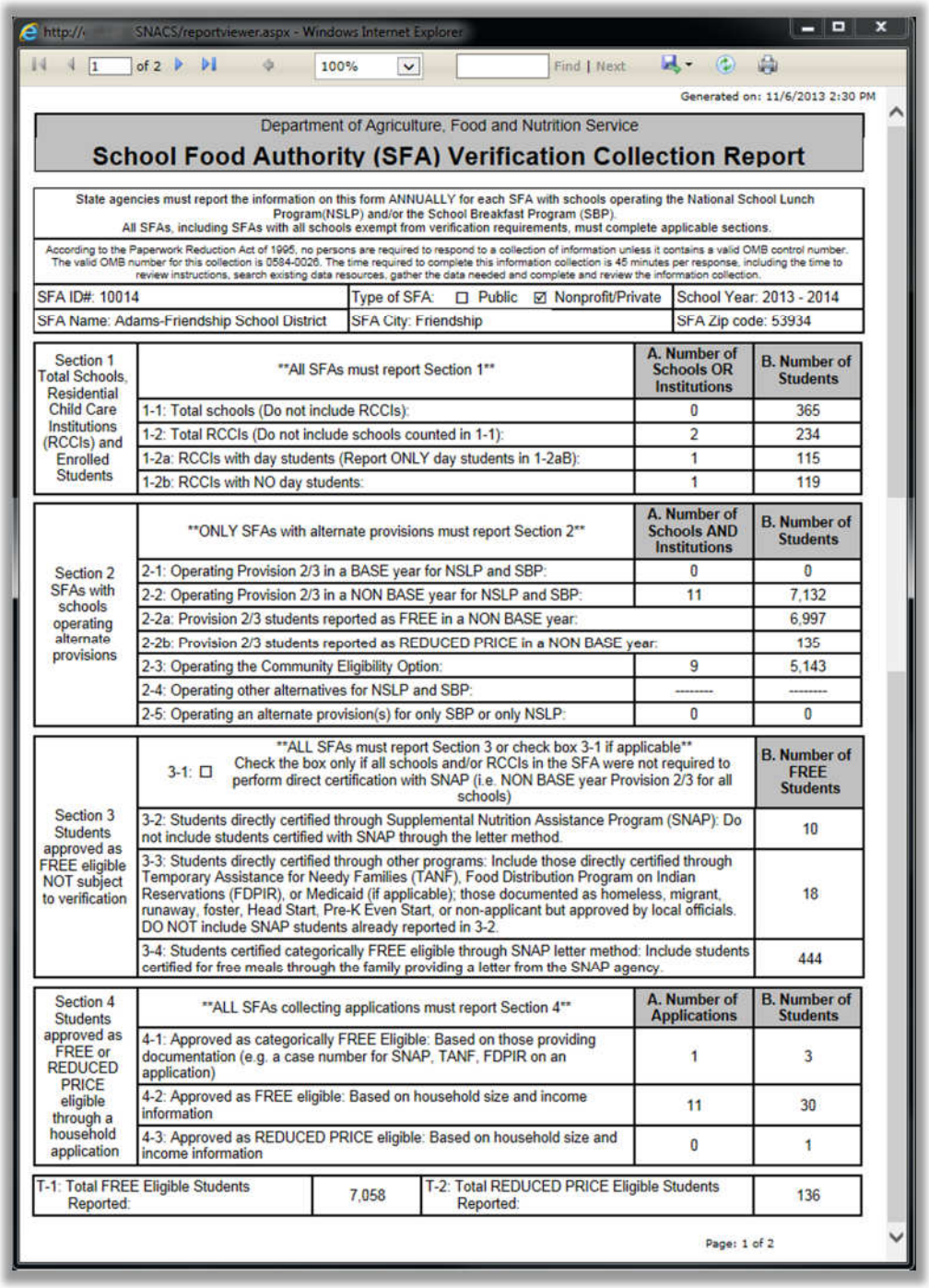
On the *Collection Report* page

- Click **Verification Collection Report**

The completed Collection Report appears in the Print window.

To print the report

- Click **Print** ( ) on the window toolbar.



http://[illegible] SNACS/reportviewer.aspx - Windows Internet Explorer

1 of 2 100% Find | Next

Generated on: 11/6/2013 2:30 PM

Department of Agriculture, Food and Nutrition Service

School Food Authority (SFA) Verification Collection Report

State agencies must report the information on this form ANNUALLY for each SFA with schools operating the National School Lunch Program(NSLP) and/or the School Breakfast Program (SBP).
All SFAs, including SFAs with all schools exempt from verification requirements, must complete applicable sections.

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number. The valid OMB number for this collection is 0584-0026. The time required to complete this information collection is 45 minutes per response, including the time to review instructions, search existing data resources, gather the data needed and complete and review the information collection.

SFA ID#: 10014	Type of SFA: ☐ Public ☑ Nonprofit/Private	School Year: 2013 - 2014
SFA Name: Adams-Friendship School District	SFA City: Friendship	SFA Zip code: 53934

		A. Number of Schools OR Institutions	B. Number of Students
Section 1 Total Schools, Residential Child Care Institutions (RCCIs) and Enrolled Students	**All SFAs must report Section 1**		
	1-1: Total schools (Do not include RCCIs):	0	365
	1-2: Total RCCIs (Do not include schools counted in 1-1):	2	234
	1-2a: RCCIs with day students (Report ONLY day students in 1-2aB):	1	115
	1-2b: RCCIs with NO day students:	1	119

		A. Number of Schools AND Institutions	B. Number of Students
Section 2 SFAs with schools operating alternate provisions	**ONLY SFAs with alternate provisions must report Section 2**		
	2-1: Operating Provision 2/3 in a BASE year for NSLP and SBP:	0	0
	2-2: Operating Provision 2/3 in a NON BASE year for NSLP and SBP:	11	7,132
	2-2a: Provision 2/3 students reported as FREE in a NON BASE year:		6,997
	2-2b: Provision 2/3 students reported as REDUCED PRICE in a NON BASE year:		135
	2-3: Operating the Community Eligibility Option:	9	5,143
	2-4: Operating other alternatives for NSLP and SBP:	--------	--------
	2-5: Operating an alternate provision(s) for only SBP or only NSLP:	0	0

		B. Number of FREE Students
Section 3 Students approved as FREE eligible NOT subject to verification	3-1: ☐ **ALL SFAs must report Section 3 or check box 3-1 if applicable** Check the box only if all schools and/or RCCIs in the SFA were not required to perform direct certification with SNAP (i.e. NON BASE year Provision 2/3 for all schools)	
	3-2: Students directly certified through Supplemental Nutrition Assistance Program (SNAP): Do not include students certified with SNAP through the letter method.	10
	3-3: Students directly certified through other programs: Include those directly certified through Temporary Assistance for Needy Families (TANF), Food Distribution Program on Indian Reservations (FDPIR), or Medicaid (if applicable); those documented as homeless, migrant, runaway, foster, Head Start, Pre-K Even Start, or non-applicant but approved by local officials. DO NOT include SNAP students already reported in 3-2.	18
	3-4: Students certified categorically FREE eligible through SNAP letter method: Include students certified for free meals through the family providing a letter from the SNAP agency.	444

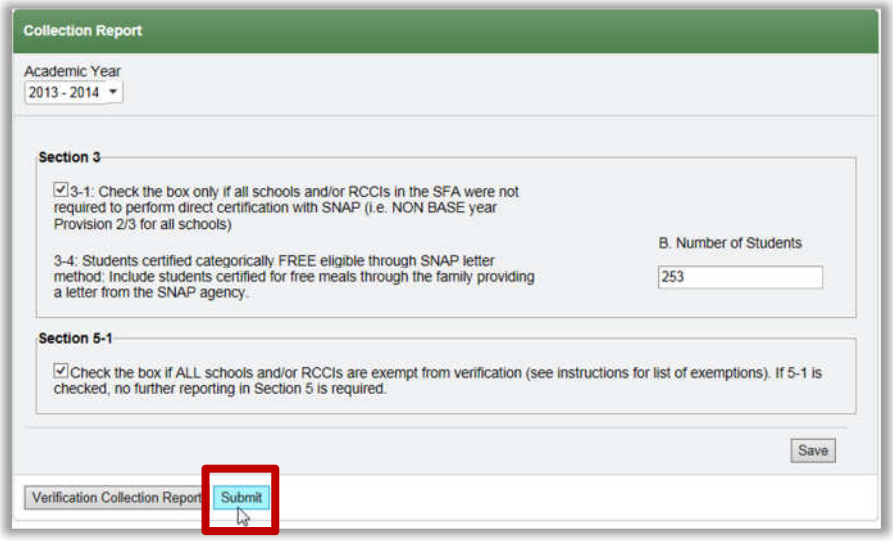
		A. Number of Applications	B. Number of Students
Section 4 Students approved as FREE or REDUCED PRICE eligible through a household application	**ALL SFAs collecting applications must report Section 4**		
	4-1: Approved as categorically FREE Eligible: Based on those providing documentation (e.g. a case number for SNAP, TANF, FDPIR on an application)	1	3
	4-2: Approved as FREE eligible: Based on household size and income information	11	30
	4-3: Approved as REDUCED PRICE eligible: Based on household size and income information	0	1

T-1: Total FREE Eligible Students Reported:	7,058	T-2: Total REDUCED PRICE Eligible Students Reported:	136

Page: 1 of 2

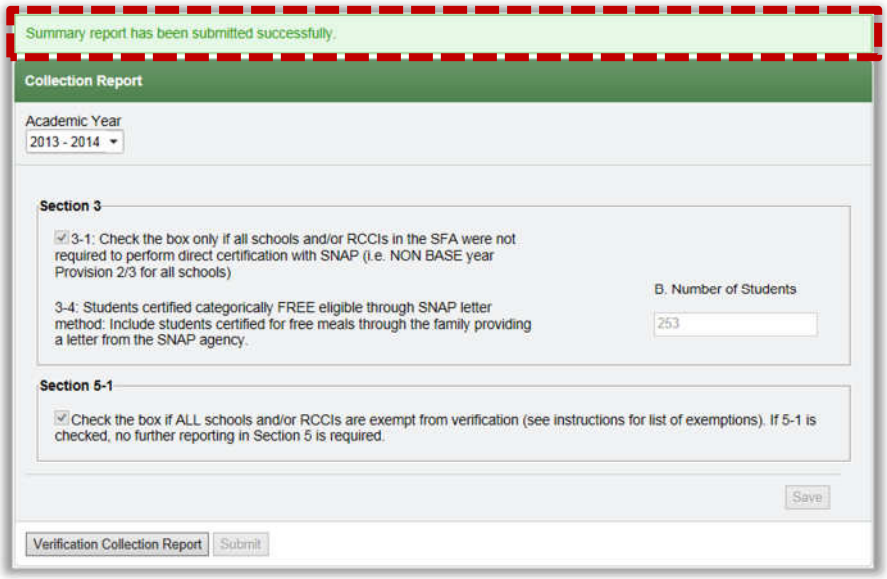
Submitting a Collection Report

The Collection Report is submitted sometime between November and January. The report can only be submitted once. Submitting the report sends the completed report to the Wisconsin Department of Public Instruction.



On the *Collection Report* page

- Click **Submit** .



A submit success message appears.

The **Save** and **Submit** buttons are no longer available.

Note: If an error in your Verification Collection Report is discovered after it has been Submitted, contact DPI to have the report "unlocked".

End of Chapter

Appendix A: Messages

Table A.1 Messages for Eligibility Certification

Subject / Message / *Description*
Category: Eligibility
No Applications Processed No Applications have been processed in SNACS as of <<Setting Date>>. *Appears on the Setting Date, which is currently set to 10/1 and appears 1-time*
No DC File Processed No Direct Certification file has been processed in SNACS as of 9/1. *Appears 9/1 and appears 1-time*
Updated Letter Template DPI has updated the <<Template Name>> standard letter template. Any SFA modified letter for this template will need to be updated. *Appears when DPI updates a standard Letter Template*
Category: Verification
Verification Collection Report Due Verification Collection Report is due by 2/1 *Appears on several dates between 11/1 and 2/1 if it has not been submitted.*
Verification Sample Due Verification sample should be created on 10/1. *Appears on 10/1*
Verification Sample Overdue Verification sample is overdue. It should have been created on 10/1.
Verification has not been Completed Verification should be completed by 11/15.
Verification has not been Completed Verification completion date has passed.
Verification Collection Report Verification Collection Report has not been submitted. It is due by 2/1.
Applications Still in Verification There are one or more applications in Verification that have not been completed. *Appears on 1st of each month December through June as long as one or more applications in Verification are not in "Removed" or "Completed" status.*

End of Appendix

Appendix B: System Settings

Table B.1 System Settings for Eligibility Certification

System Setting / Description
Category: Agency Certifications
Migrant Liaison Coordinator Used for letters; default is set to State-level coordinator; SFA may change data.
Category: Eligibility Reports
Include Adverse Action days during grace period Yes / No; "Yes" specifies to include .
Retain Eligibility Until Grace Prd End Date Yes / No; "Yes" specifies to provide currently assigned level of benefits to the student until the last day of the Grace Period.
Include Date of Birth on Application Controls whether the Date of Birth is used on applications. Set by default to "Yes" – strongly recommend using this value**.**
Category: Verification
Email From Controls the email address shown as "From" for all emails sent through SNACS for this SFA; this needs to be an actual email address; if this is an email address that is not monitored, suggest that the SFA add as "No Reply" address and add text to the letters indicating not to use "Reply" and, if desired, giving the correct contact email for the individual type of letter.
Email CC Not Required; controls the SFA's email address that will be automatically copied on every email sent from SNACS; if used, this needs to be an actual email address.
Email Bcc Not Required; controls the SFA's email address that will be automatically blind copied on every email sent from SNACS; if used, this needs to be an actual email address.
Verification Response Due Days Used in Verification to control the current Respond By date; may be changed at any time and will be effective from that point forward.; currently set at 15 (days). **Note:** As the end of the Verification period approaches, the SFA should adjust the number down; the number should be reset to a larger number at the end of Verification (for the next year)

End of Manual