

## **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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#### **Software Version: 6.2**

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#### **Table of Contents**

Chapter 1: Getting Started	
Dashboard	
Viewing a Message	<u>c</u>
Printing a Message	
Deleting a Message	11
Module Navigation	12
Log Out of SNACS	13
How to Use This Manual	14
Text Conventions	
Category and Page Conventions	
Icon Conventions	
Message Conventions	
Using List Display Controls	
Chapter 2: Applications	19
Applications at a Glance	19
Application Image Upload	20
Uploading and Accepting Application Images	
Rejecting Application Images	
Application File Upload	25
Uploading an Application File	
Error Messages	
Manual Entry	29
Manually Adding an Application	
Validate	42
Validation Workspace	43
Searching for an Application Batch	44
Validating an Application	45
Validating an Application Batch	64
Viewing an Application Batch Summary	66
Continuing Validation	68
Checking In a Batch	70
Notifying Processed Application Batches	71
Notify	74
Listing Application Batches	75
Sending Notification of Individual Batches	76
Sending Notification for Individual Applications	77
Processing Notification	78
Master Index	80
Searching for an Application	81
Searchina for a Student	82

Viewing an Application	83
Chapter 3: Agency Certifications	89
Agency Certifications at a Glance	
DC / Other Certifications	
Searching for Direct Certifications	
Displaying a Direct Certification	
Uploading a Certification File	
Adding Supporting Documents	
Removing a Supporting Document	104
Matching a Student Manually	106
Reprocessing a File	108
Exporting a File	109
Sending Notification	110
DC Sibling Matching	111
Matching By Eligibility Group	112
Matching by Address	113
Matching by Guardian	114
Matching Manually	115
Removing a Student from Certification	116
Chapter 4: Letter Management	119
Letter Management at a Glance	119
Letter Templates	120
Displaying All Templates for a Letter Type	
Viewing a Letter Template	
Adding a Custom Letter Template	
Editing a Letter Template	
Setting the Active Letter Template	135
Deleting a Letter Template	137
Chapter 5: Eligibility Reports	139
Application Processing	140
Generating an Application Processing Report	141
DC Sibling	142
Generating a DC Sibling Matching Report	
Eligibility Roster	144
Generating an Eligibility Roster Report	
Expiring Carryover	
Generating an Expiring Carryover Report	
Eligibility Summary	
Generating an Eligibility Summary Report	
Household Eligibility	
Generating a Household Eligibility Report	

Potential Eligibility Groups	154
Generating a Potential Eligibility Groups Report	155
Applications with SFA Eligibility	156
Generating an Applications with SFA Eligibility Report	157
Student Status Change	158
Generating a Student Status Change Report	159
Chapter 6: Verification	161
Verification at a Glance	161
Sampling	162
Generating a Sample Pool	163
Tracking	164
Verification Status	165
Displaying Applications by Verification Status	167
Displaying Applications by Verification Type	
Removing an Application from the Sample Pool	
Confirming an Application	
Sending 1 <sup>st</sup> Notification	
Sending Follow-Up Notification	
Processing NotificationRecording a Verification Response	
Recording the Verification Result Summary	
Viewing Application Verification Information	
Refusing Benefits	
Collection Report	
Completing Collection Report Data	
Generating and Printing a Collection Report	
Submitting a Collection Report	
Appendix A: Messages	193
Appendix B: System Settings	196
Appendix 2. System settings	
ables & Figures	
Table 1.1 Text Conventions	14
Table 1.2 Icon Conventions	16
Table 1.3 Message Conventions	16
•	
• •	
Table 2.1 Applications Menu Functions  Table 2.2 Application Image Upload Page Functions  Table 2.3 Application File Upload Page Functions	2

Table 2.5 Manual Entry Page Functions	29
Table 2.6 Validate Page Functions	42
Table 2.7 Validation Workspace Buttons	61
Table 2.8 Validation Workspace Functions	62
Table 2.9 Notify Page Functions	74
Table 2.10 Master Index Page Functions	80
Table 3.1 Agency Certifications Menu Selections	89
Table 3.2 Direct Approvals Page Functions	90
Table 3.3 Direct Certification Listings	91
Table 3.4 Summary tab functions	94
Table 3.5 Matched and in SNACS tab functions	95
Table 3.6 Matched and NOT in SNACS tab functions	96
Table 3.7 Unmatched tab functions	97
Table 3.8 DC Sibling Matching Page Functions	111
Table 4.1 Letter Management Menu Selections	119
Table 4.2 Letter Templates Page Functions	121
Table 5.1 Eligibility Reports Menu Selections	139
Table 5.2 Application Processing Page Functions	140
Table 5.3 DC Sibling Page Functions	142
Table 5.4 Eligibility Roster Page Functions	145
Table 5.5 Expiring Carryover Page Functions	148
Table 5.6 Eligibility Summary Page Functions	150
Table 5.7 Household Eligibility Page Functions	152
Table 5.8 Potential Eligibility Groups Functions	154
Table 5.9 Applications with SFA Eligibility Functions	156
Table 5.10 Student Status Change Page Functions	158
Table 6.1 Verification Menu Selections	161
Table 6.2 Sampling Page Functions	162
Table 6.3 Tracking Page Functions	164
Table 6.4 Verification Status Codes	165
Table 6.5 Collection Report Page Functions	187
Table A.1 Messages for Eligibility Certification	194
Table R 1 System Settings for Fligibility Certification	197

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# **Chapter 1: Getting Started**

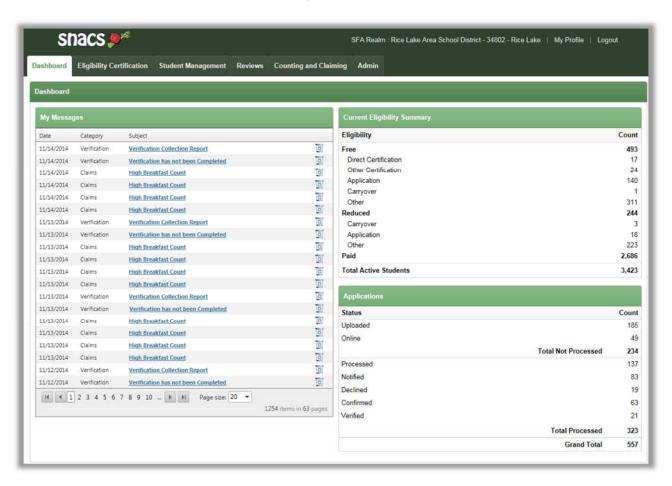
#### In this chapter you will learn:

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

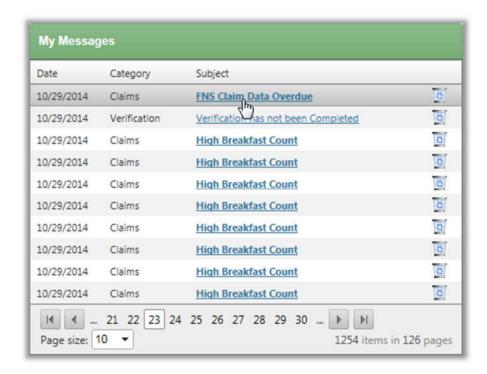
#### **Dashboard**

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.

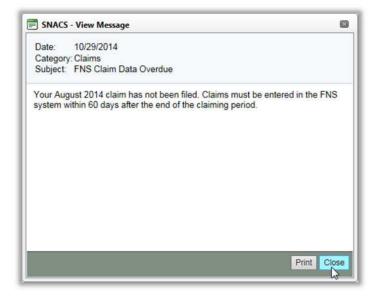


#### Viewing a Message



In the **My Messages** list

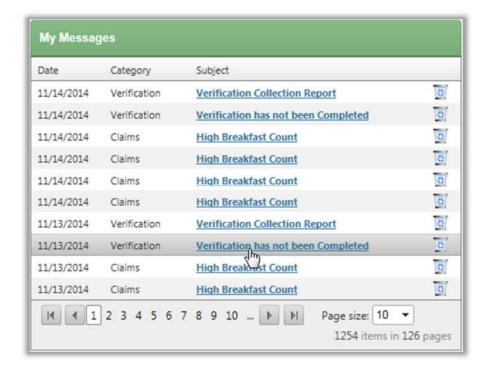
 Click a Subject link in a message listing.



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

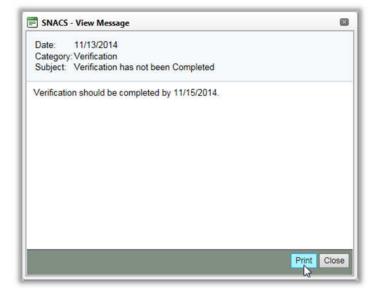
Click Close to close the View Message popup.

#### **Printing a Message**



In the My Messages list

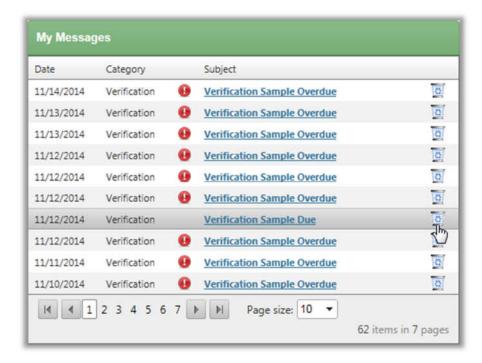
 Click a Subject link in a message listing.



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

 Click Print to send the message to the printer.

#### **Deleting a Message**



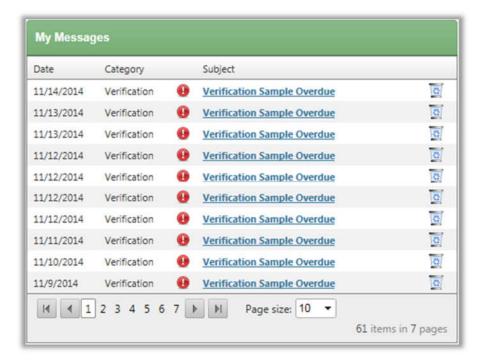
In the My Messages list

• 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.



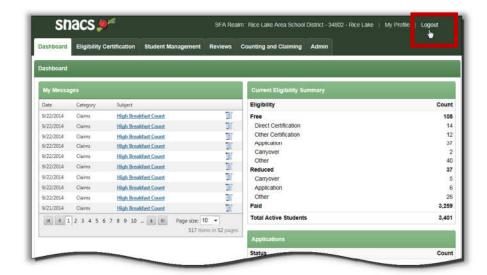
The **Admin** module offers two (2) categories in the navigation bar on the left of the SNACS web page.

#### 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 <u>Logout</u>.



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 <b>Calendar</b> (
Clickable link	Bold, <u>underlined</u>	Click the <u>User Name</u> in the <u>User Name</u> column.
Field name	Bold, <u>underlined</u> , capitalization as seen on page	In <b>Role</b> , select a role.  In <b>First Name</b> , enter the user's first name.
Group name	Bold, capitalization as seen on page	In the <b>User Profile</b> group In the <b>Roles</b> group
Key name	Small caps	TAB key ENTER key
Category name	Bold, title caps	The <b>Sites and Users</b> category is
Menu selection	Bold, capitalization as seen on page	Select <b>Login Details</b> on the
Message	Italics, enclosed in quotes, capitalization as seen on page	"User successfully updated."
<b>Module Name</b>	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

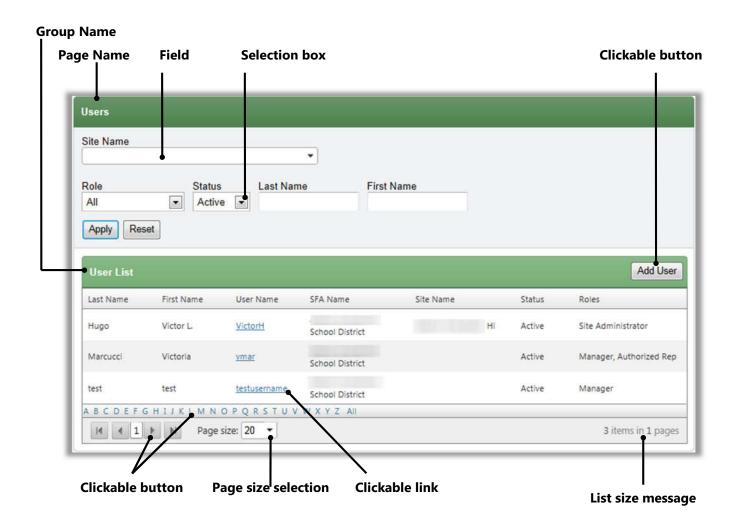
Table 1.1 Text Conventions

#### **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
<b>©</b>	Note	Additional information on the use or operation of the command or topic.
<u> </u>	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

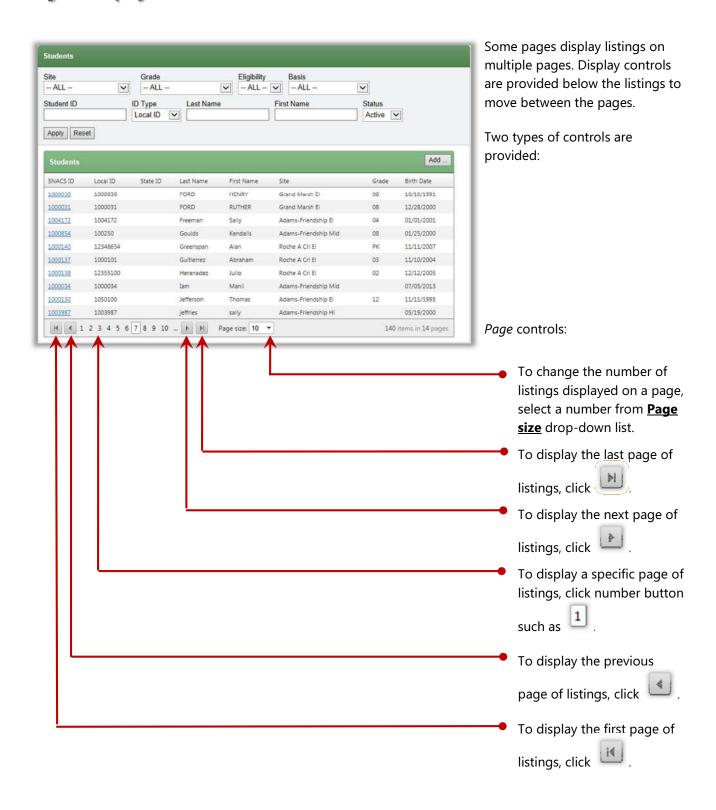
#### **Message Conventions**

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**



# **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.

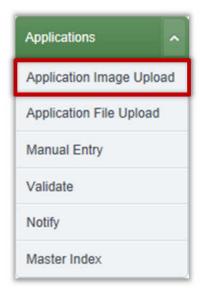
**Table 2.1 Applications Menu Functions** 



#### **♦** Note

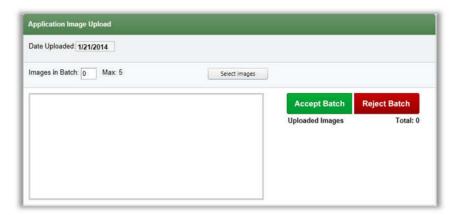
Categories and menu selections to which you have access in SNACS are those appropriate for your assigned role(s). When you access the **Applications** menu, you may see a subset of the menu selections listed above.

#### **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**

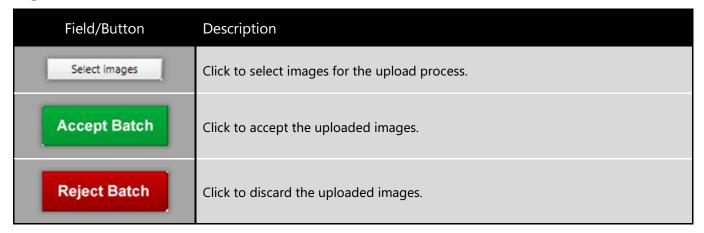
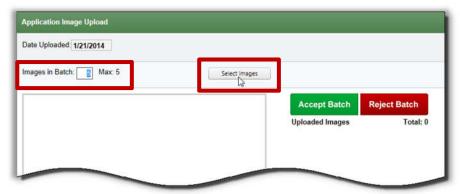


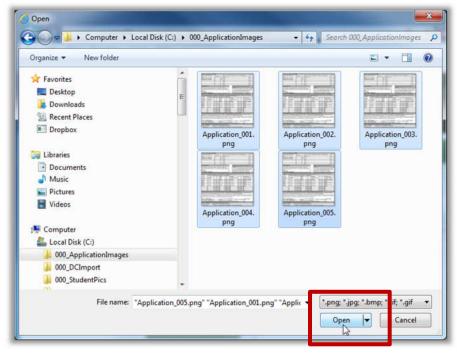
Table 2.2 Application Image Upload Page Functions

#### **Uploading and Accepting Application Images**



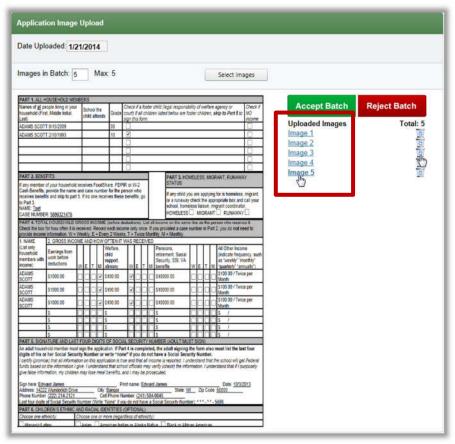
## On the **Application Image Upload** page

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



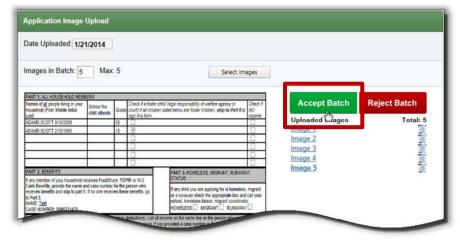
#### In the **Open** popup

- 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

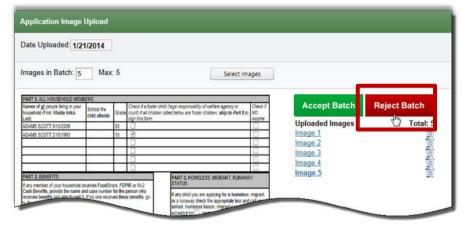
Click

Accept Batch



An acceptance message appears with the batch number

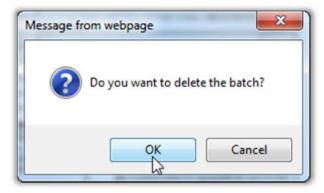
#### **Rejecting Application Images**



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

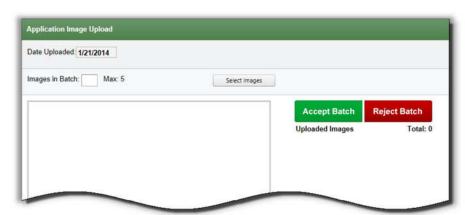
Click





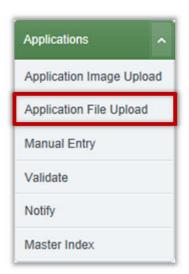
In the confirmation popup

- Click OK



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**



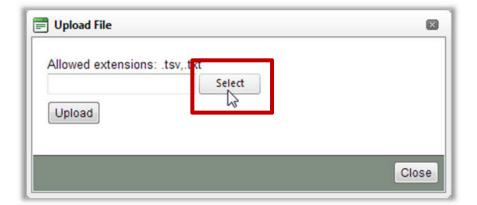
Table 2.3 Application File Upload Page Functions

#### **Uploading an Application File**



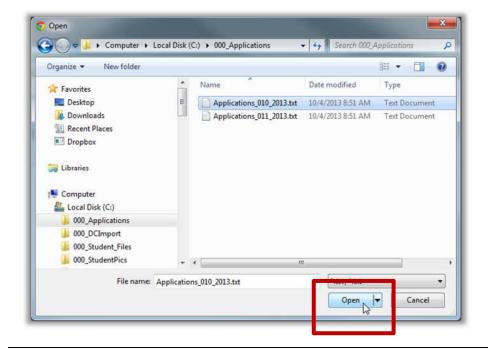
On the Application File Upload page

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.

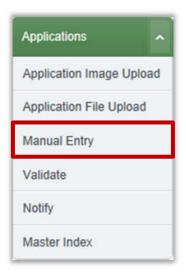


A minimum of 4 four digits must be provided for the applicant's SSN on an application. If less than four is entered, an error message "Invalid SSN" appears in the details area of the Validation Workspace.

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**



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.

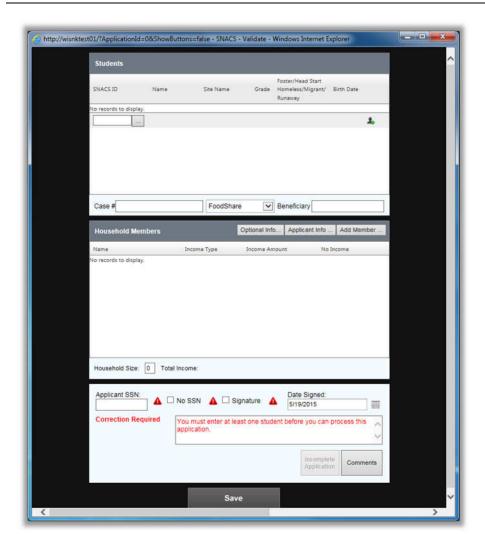
All of the above actions are performed in the window called the Validation Workspace.



On the Manual Entry page:

Click

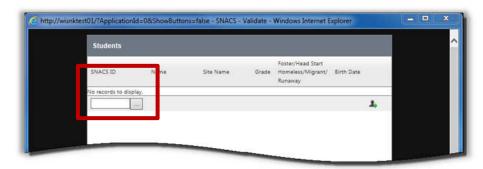




The *Validate* window opens.
This window is also referred to as the *Validation Workspace*.
The *Validation Workspace* includes three groups of information

- 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** ( 🔠 )



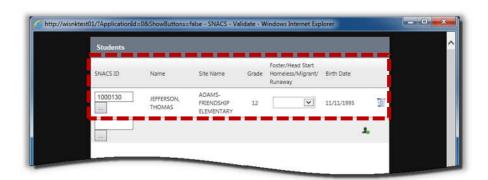
#### In the **Lookup** popup

- Select one or more search conditions.
- Click Search



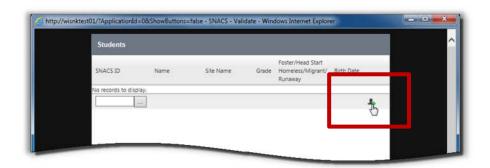
In the list of students that match the search conditions

- Select a student listing.
- Click OK .



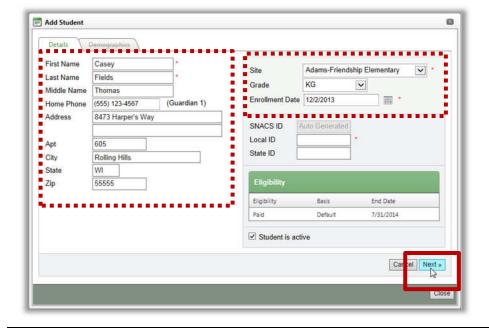
The student's information appears in the **Students** group.

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



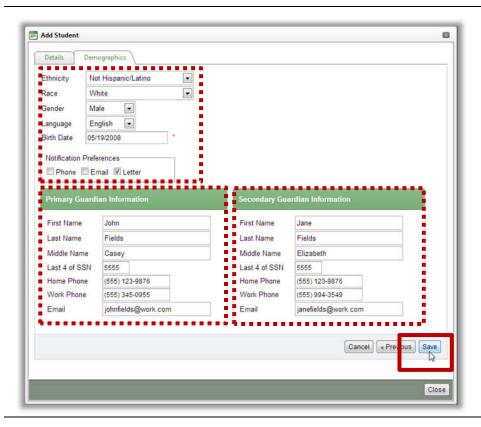
#### In the **Students** group

Click Add New Student



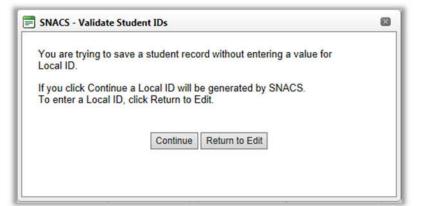
#### In the Add Student popup

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



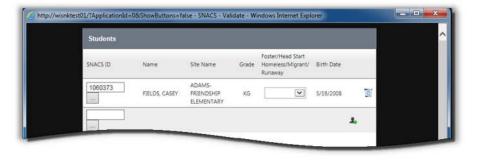
#### On the **Demographics** tab

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



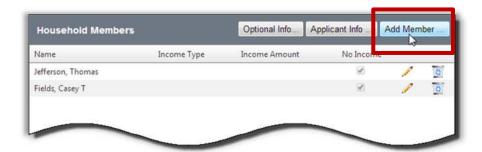
If a **Local ID** was not entered on the *Details* tab, in the **Validate Student IDs** popup

Click



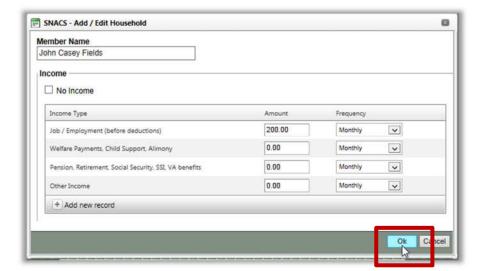
The student's information appears in the **Students** group.

#### Step 2: Household Members Group—Adding a Household Member



## In the **Household Members** group

Click Add Member ...



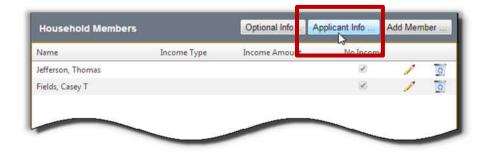
## In the **Add / Edit Household** popup

- 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

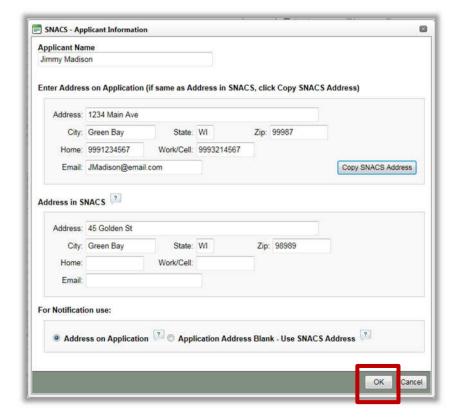
The limit for a single income entry is \$9,999,999.99 or less.

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



## In the **Household Members** group

Click Applicant Info ...

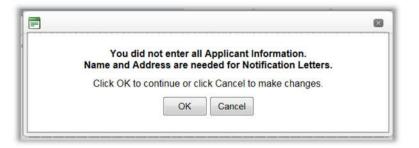


## In the **Applicant Information** popup

- 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

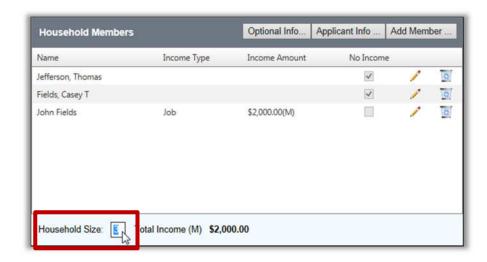
Click Optional Info...



## 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 Save .



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

 Click the <u>Application #</u> link to view the application.



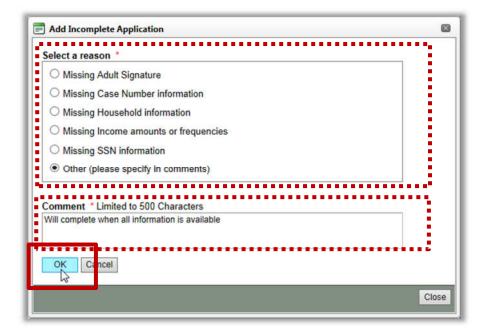
Several buttons appear in the Authorization group when the application has a status of "Valid".

## Incomplete Application



To indicate that the application has required information that is missing





In the Add Incomplete
Application popup

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

This popup also appears when the



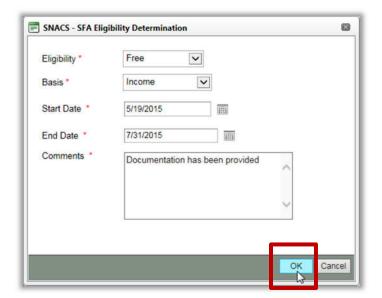
button is clicked and the application has a status of "Correction Required."

## Enter SFA Eligibility



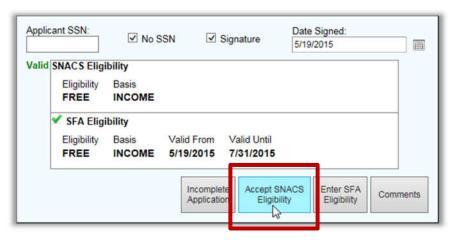
To manually select benefits eligibility





# In the SFA Eligibility Determination popup

- Make changes as needed.
- Enter text in <u>Comments</u>.
- Click OK .



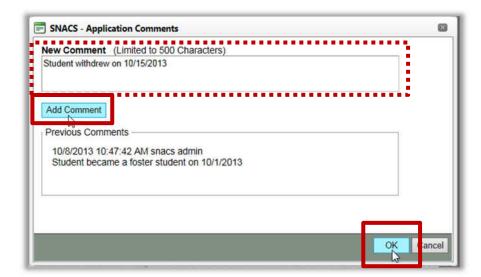
When SNACS Eligibility is different from SFA Eligibility, a new button appears that allows you to override the SFA Eligibility with the SNACS Eligibility.

#### **Enter Comments**



To add comments regarding the application





# In the **Application Comments** popup

- Enter comment text in New Comment.
- Click Add Comment
- Click OK .

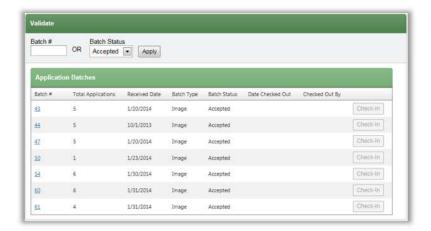
#### **Validate**



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.

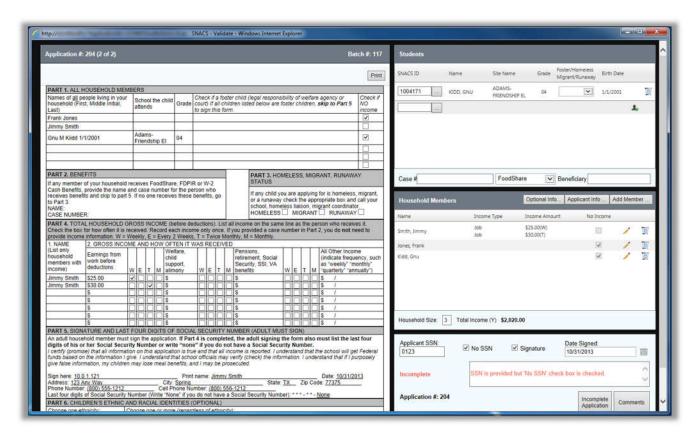
Table 2.6 Validate Page Functions

# **Validation Workspace**

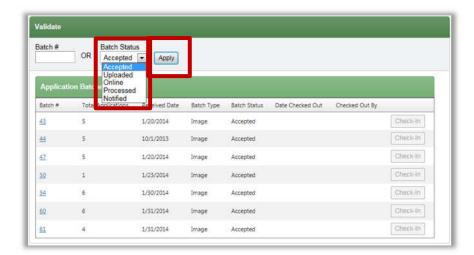
Validation takes place in the Validation Workspace window. This window automatically opens when you click on an **Application # link** in the **Application Summary** list on the *Batch Summary* page.

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.

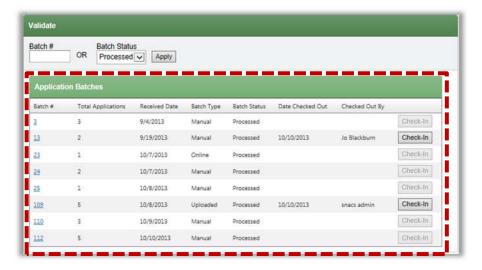


# **Searching for an Application Batch**



On the Validate page

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



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

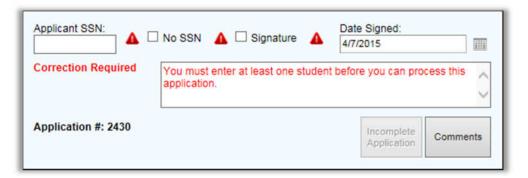
# Validating an Application

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.



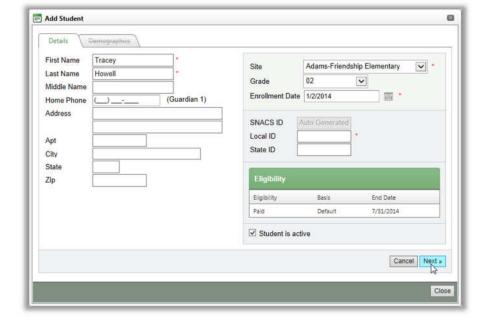
#### Add a Student Not in SNACS

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



In the student listing

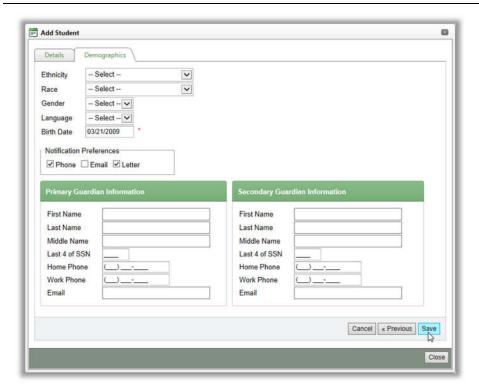
Click Add New Student
 ( ).



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

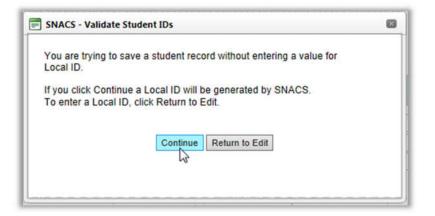
In the **Add Student** popup on the **Details** tab

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



# On the **Demographics** tab

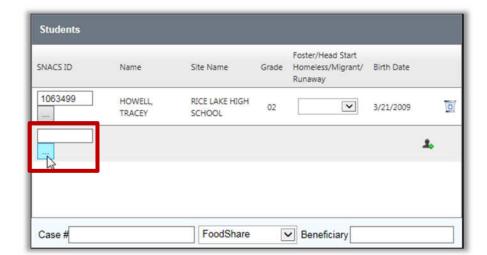
- Enter or select demographic student data, if available.
- Verify or enter Birth Date.
- Enter Notification
   Preferences, if available.
- Enter Guardian
   Information, if available.
- Click Save .



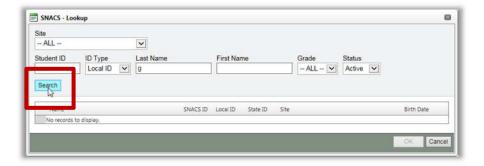
The **Validate Student IDs** popup appears if you did not enter a Local ID.

- Click Continue

# Add a Student Already in SNACS



#### In the **Students** group



#### In the **Lookup** popup

- Select one or more search conditions.
- Click Search

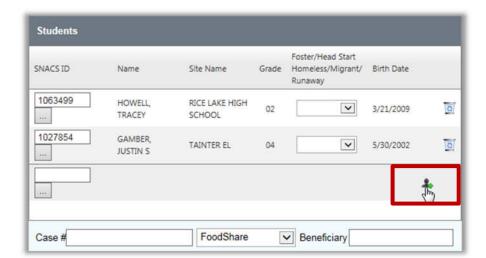


In the list of students that match the search conditions

- Select a student listing.
- Click OK

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

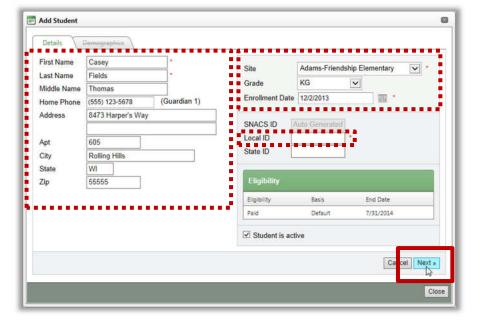
#### Add a Student Not in SNACS and Not Listed



#### In the **Students** group

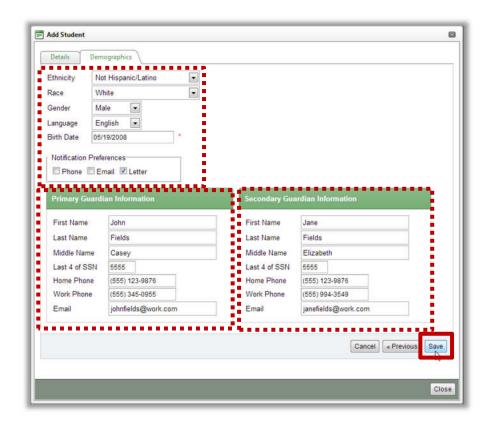
Click Add New Student





#### In the **Add Student** popup

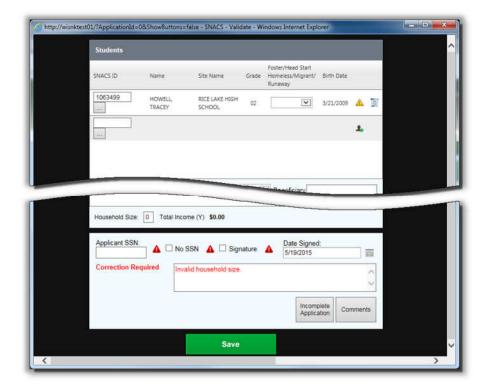
- Enter student details.
- Select a Site and Grade, and enter or select an Enrollment Date.
- Enter a Local ID, if available.
- Click Next »



#### On the **Demographics** tab

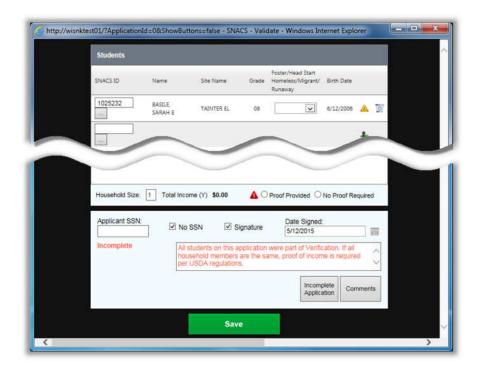
- Select basic student demographics, enter a birthdate and select a Notification preference.
- Enter **Primary Guardian Information**.
- Enter Secondary
   Guardian Information.
- Click Save

# 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

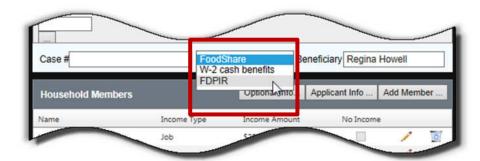


field appears. A message appears in the details group that proof of income is required.

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** 



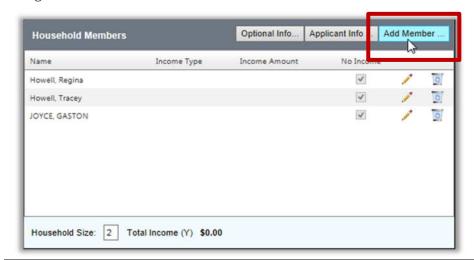
In the **Household Members** group

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

# Step 2: Verify Household Members

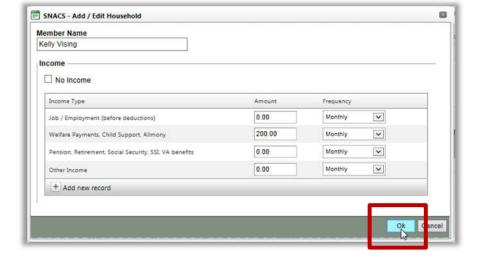
Household members and their received income are shown on the application in **PART 4. TOTAL HOUSEHOLD GROSS INCOME**. Verify that all listed household members, their income, and income frequency appear in the **Household Members** list.

Adding a Household Member



In the Household Members group





# 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

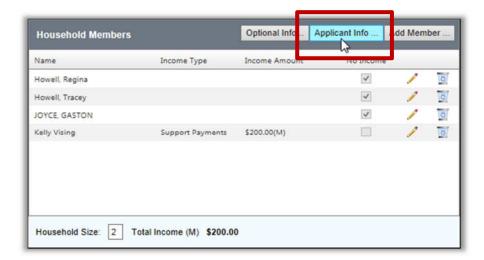


In the **Household Members** group

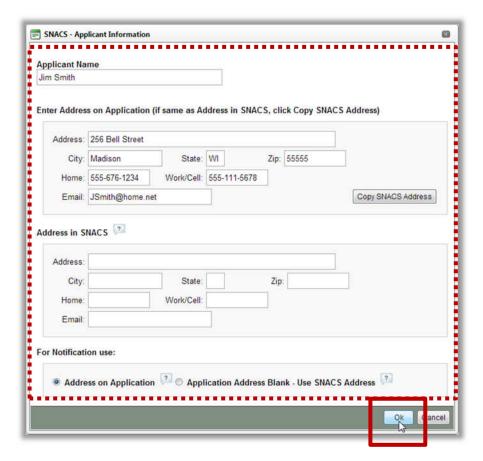
• Click **Delete** ( ) in a member listing.

The member is removed. No confirmation is required.

# Adding or Updating Applicant Information

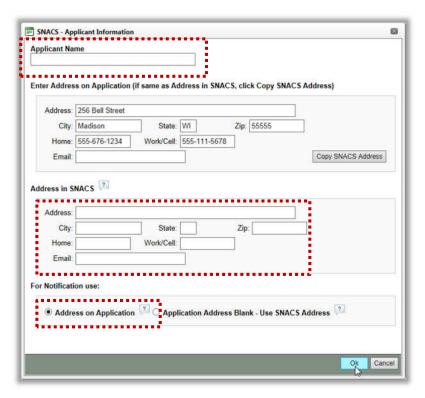


# In the **Household Members** group



# 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 .



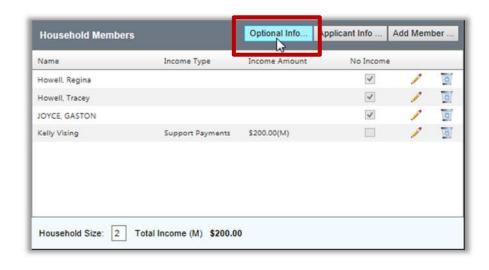
#### Note: If the

- 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.

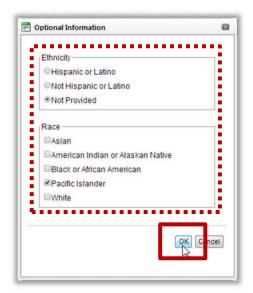
The **Applicant Name** and complete **Address on Application** details must be provided to ensure that the notification can be sent.

# Adding or Updating Optional Information



# In the **Household Members** group

Click Optional Info...

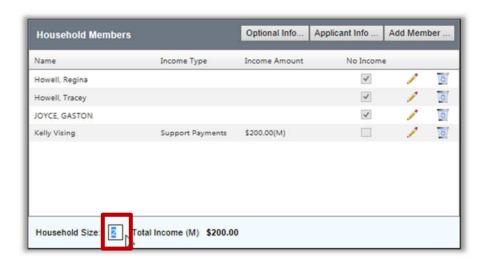


# In the **Optional Information** popup

- 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**.

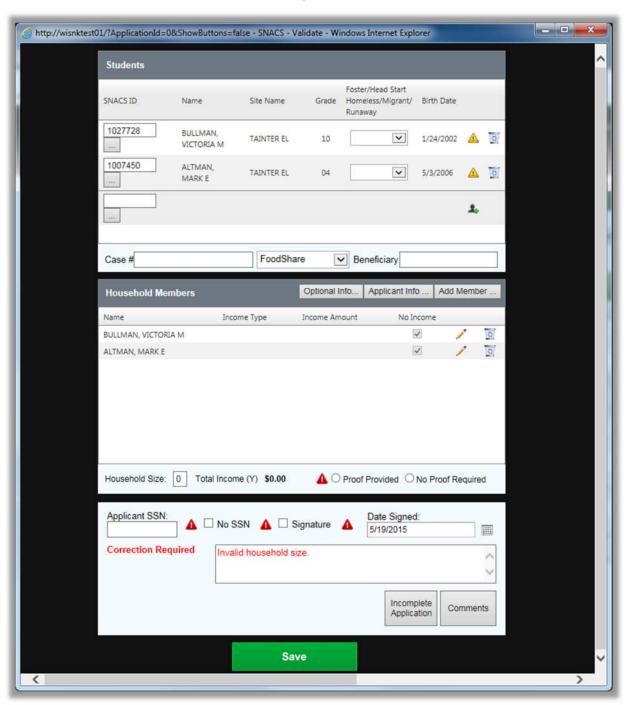


 Update the Household Size, if needed.

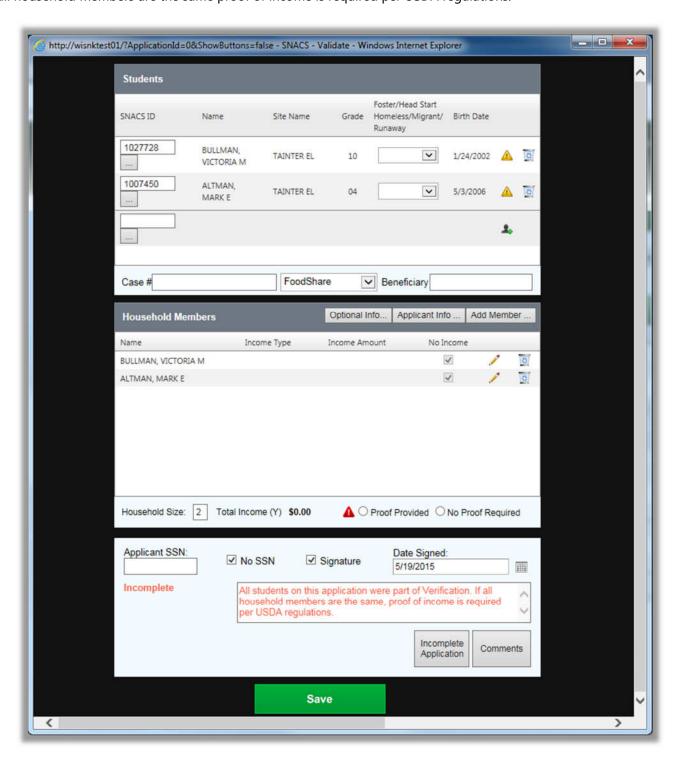
#### **Providing Proof**

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".

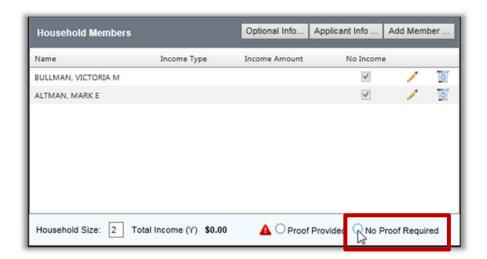


When all "Correction Required" errors are corrected the status "Incomplete" appears in the Applicant Authorization Details group with the message, "All of the students on this application were part of Verification. If all household members are the same proof of income is required per USDA regulations."



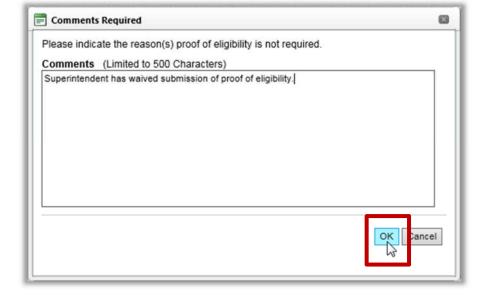
You must choose one option to complete processing for the application. Hovering over *either* option displays the message "Household must submit Proof of Eligibility. Upload documentation from the View Application page."

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."

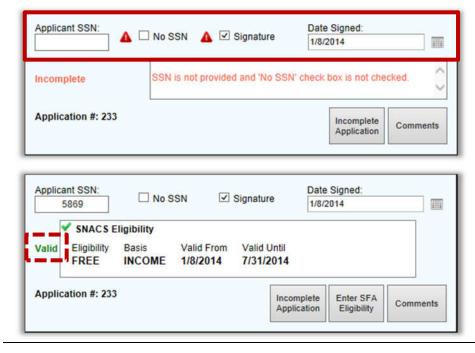


# In the **Comments Required** popup

- 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	Determination nonun to change Fligibility type Peacon Start Date or to add Comments	
Comments	Click to display the <b>Application Comments</b> popup; use the <b>Application Comments</b> popup to "attach" comment text to the application.	

Table 2.7 Validation Workspace Buttons

## Step 4: Saving an Application

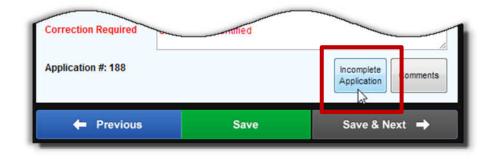
When you have completed validating the application, or have validated as much as possible, you will save the application. The available buttons at the bottom of the right-side of the Validation Workspace, may vary.

#### Validation Workspace Functions

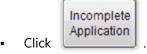
Button	Description
← Previous	Click to display the previous application in the batch; button is grayed when there are no other previous applications in the batch.
Save	Click to save updates and leave the application on display.
Save & Next →	Click to save updates and display the next application in the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

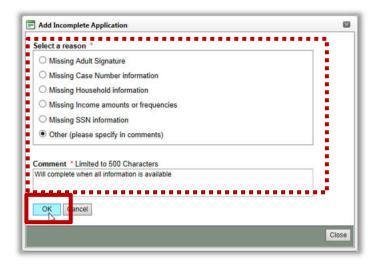
**Table 2.8 Validation Workspace Functions** 

# Recording an Incomplete Reason



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





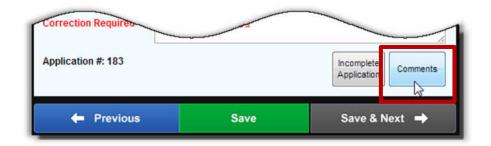
# In the **Add Incomplete Application** popup

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

#### O Note:

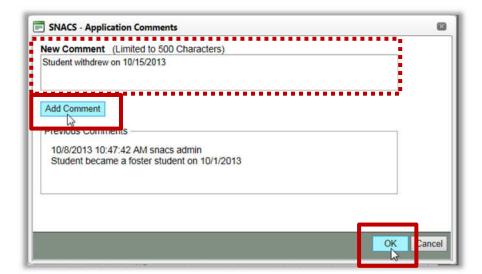
Missing Adult Signature has an impact on eligibility, so it should be selected if it is one of multiple reasons that the application is incomplete.

#### **Enter Comments**



To add comments regarding the application





# In the **Application Comments** popup

- Enter comment text in New Comment.
- Click Add Comment
- Click OK .

# **Validating an Application Batch**

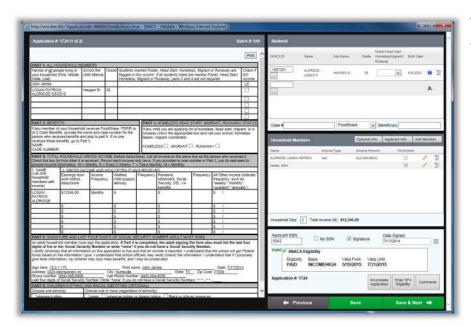


On the Validate page

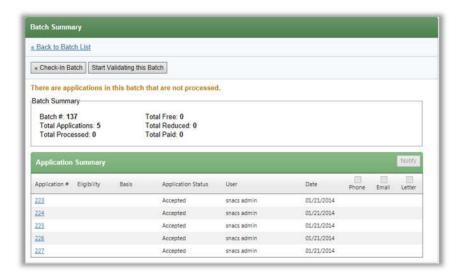
Click a <u>Batch #</u> link.

#### O Note:

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



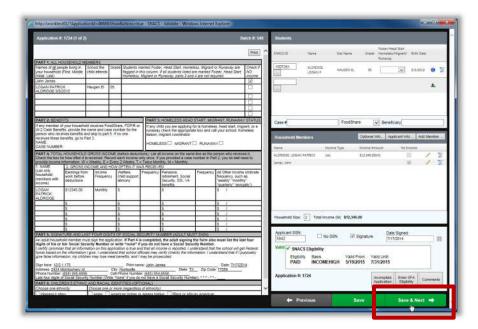
The Validation Workspace appears with the first application in the batch displayed.



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

#### O 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.

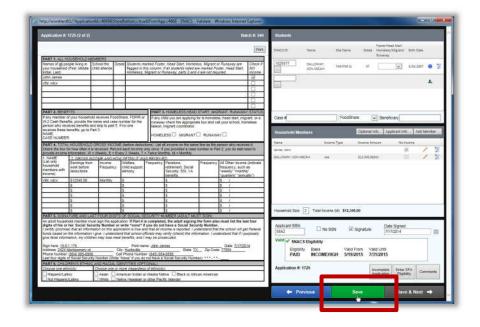


In the Validation Workspace.

- 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

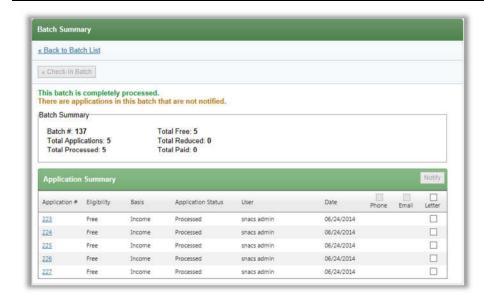


display the next application in the batch.



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.

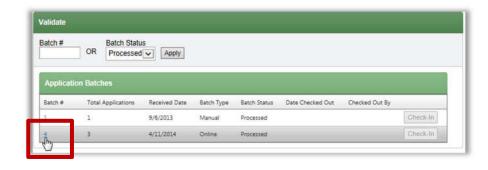
There are applications in this batch that are not notified.

Click < Back to Batch List.</li>



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

# **Viewing an Application Batch Summary**

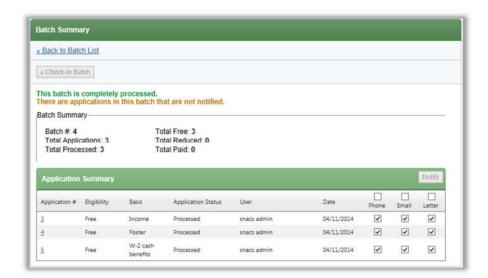


On the Validate page:

 Select "Processed" in Batch Status and click

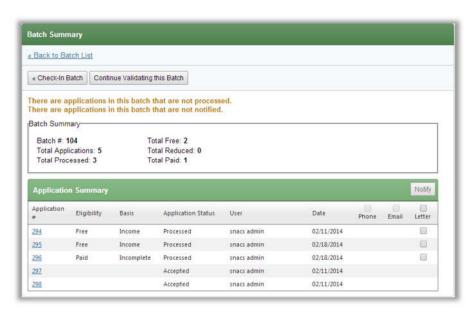


Click a Batch # link.



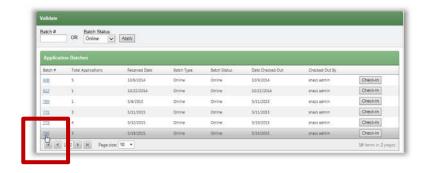
The Batch Summary page lists details about the batch as well as all applications in the batch.

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

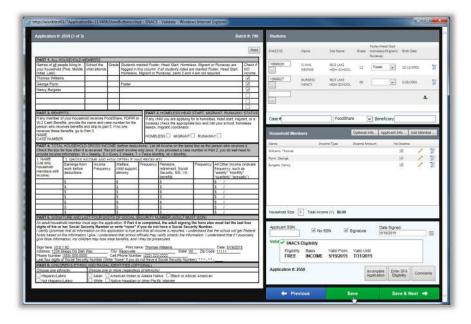
click **Close** ( ) on the

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 <u>Batch #</u> link.



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

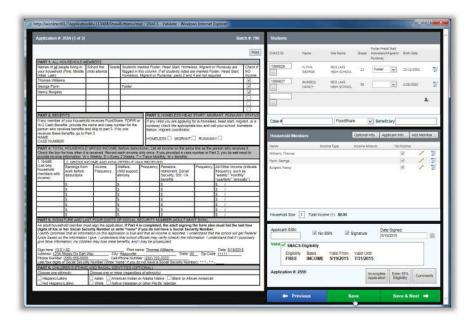
Process the application and click the appropriate button to continue to the next application or end the batch processing.



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

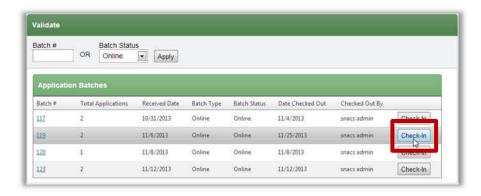
Continue Validating this Batch



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**



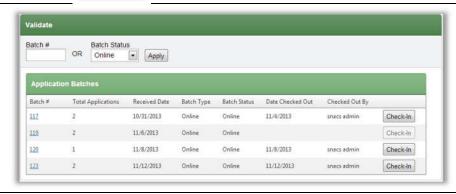
A batch is automatically checked out by the

- 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.

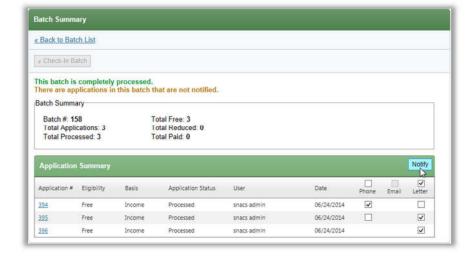
#### On the Validate page:

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



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

Click the <u>Batch #</u> 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.)

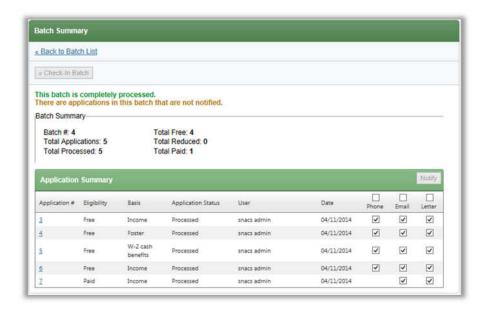


Notification can be completed for batches that include all processed applications.

 Select "Processed" in Batch Status and click



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.

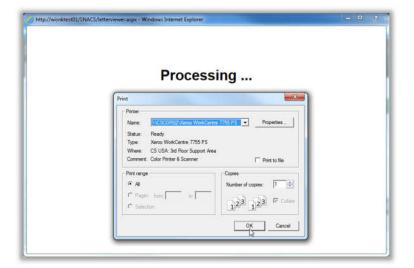
Notice that the last application does not have a selected check box for Phone notification—the applicant did not request notification by phone and/or did not provide a phone number.

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 .



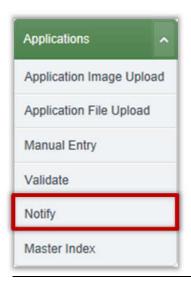
Phone notification is complete when the popup confirmation message appears.



#### O Note:

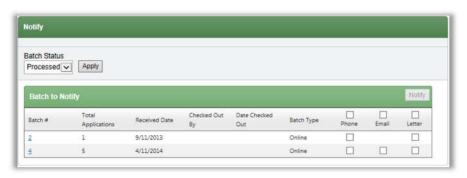
 If the This call should be considered as required Notification per USDA regulations check box is cleared, the application will not be marked Notified.

# **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

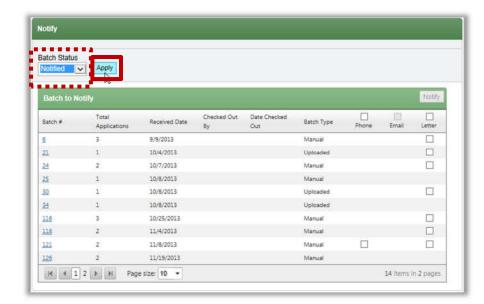
- Batch Status is set to "Processed".
- All Processed batches are listed.
- Email, Phone and Letter notification check boxes are listed when the applications in the batch include the corresponding information.
   For example, the Email check box appears in the batch listing when at least one application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

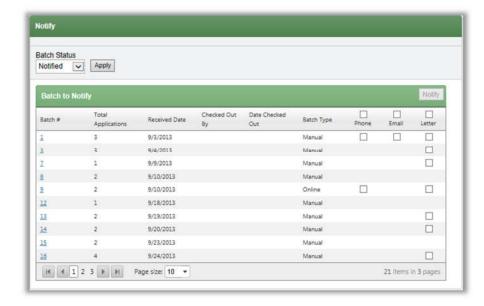
Table 2.9 Notify Page Functions

# **Listing Application Batches**



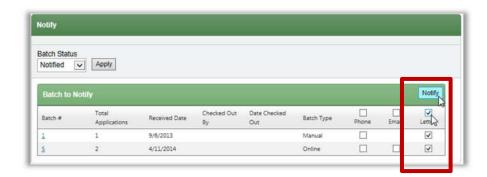
On the Notify page

- Select a status in Batch Status.
- Click Apply



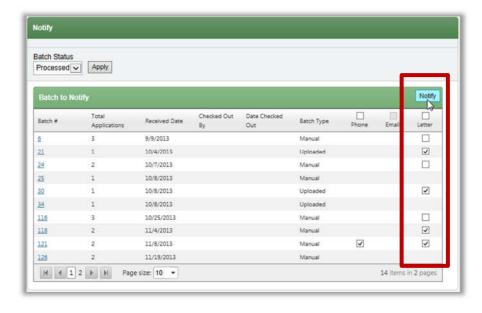
All batches of the selected status are listed in **Batch to Notify**.

# **Sending Notification of Individual Batches**



To select all batches on the *Notify* page

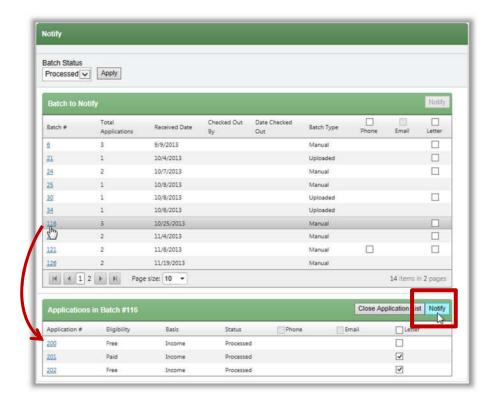
- Select in the **Batch to Notify** list header for a notification type; checkmarks are applied to each checkbox for all listed batches.
- Click Notify



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

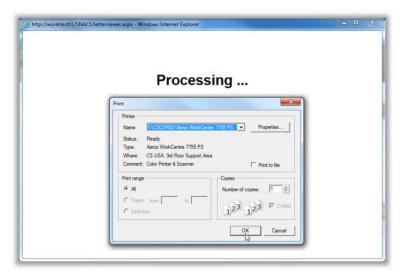
- Click a <u>Batch #</u> link in the Batch to Notify list.
- Select in individual application listings.
- Click Notify in the
   Applications in Batch # list.

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 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 <u>Comment</u>.
- 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.



#### O 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.

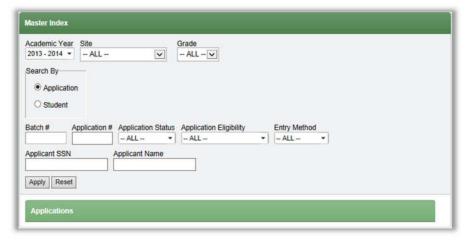
#### **Master Index**



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**

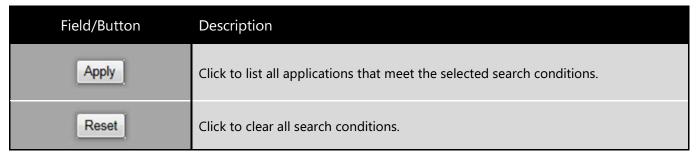
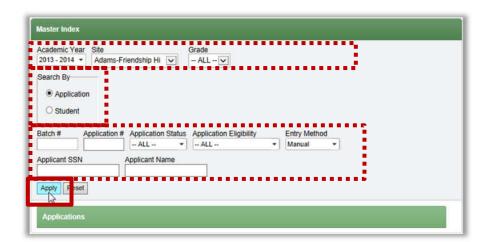


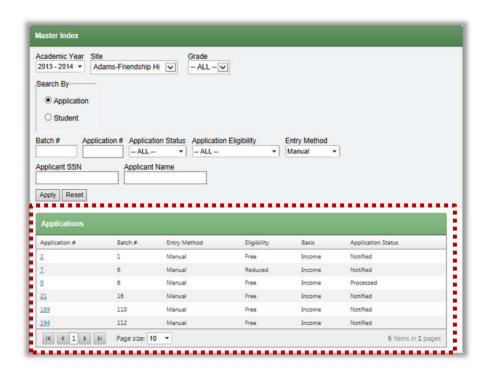
Table 2.10 Master Index Page Functions

# **Searching for an Application**



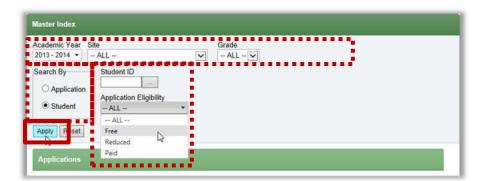
On the Master Index page

- 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 Apply



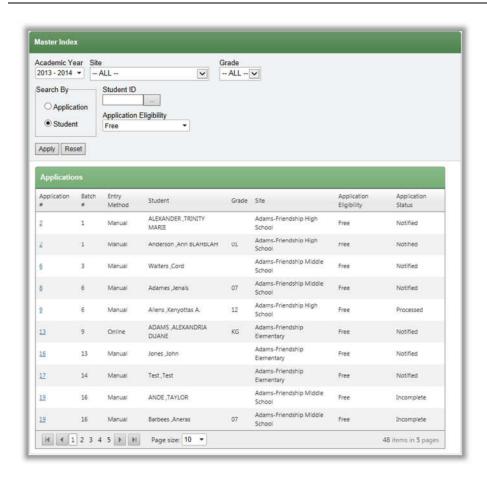
All applications that meet the search conditions are shown in the **Applications** list.

# 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



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 <u>Application #</u> link.



The *View Application* window appears.

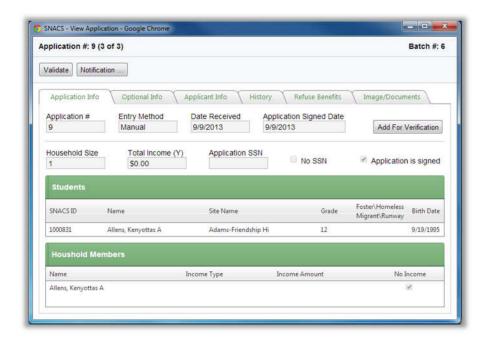
If the application has not been included in the Verification process, the **Application Info** tab appears in the window. Application details are shown that provide the application number in the batch, total number of applications in the batch, and the batch number.

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:

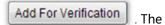
- Click Validate to open the application in the Validation Workspace window. (This button will not be displayed if the application has been selected for Verification).
- Click Notification ... to view and print the notification letter.

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



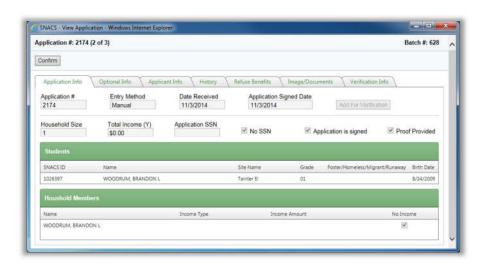
verification reason is marked "for cause" and is not part of the required sample.

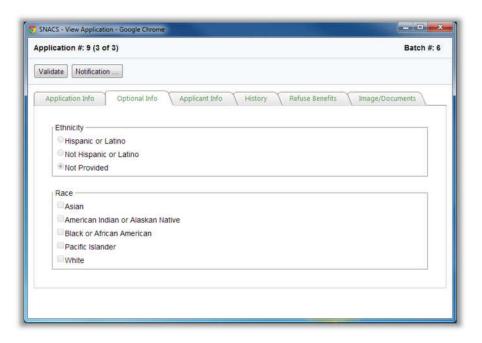
#### Note:

The Add For Verification

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

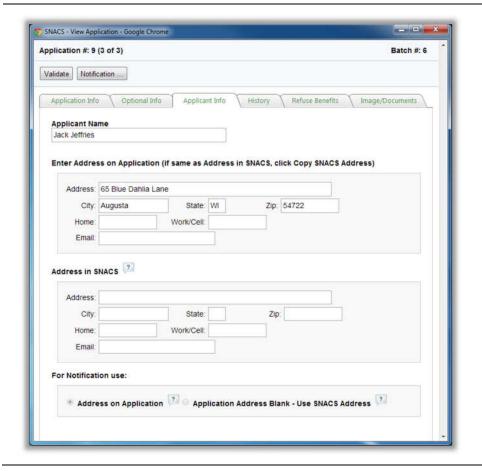
When a student is included on an application added for verification and the same student is added to a second application, the **Proof Provided** option appears on the **Application Info** tab.





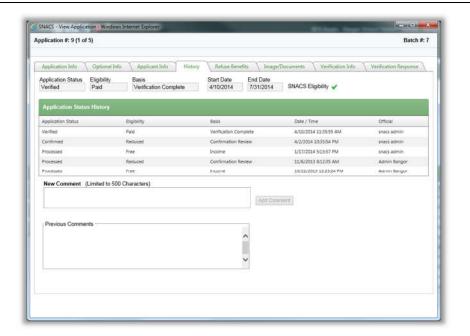
The **Optional Info** tab contains information submitted at the discretion of the household regarding ethnicity or race.

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.

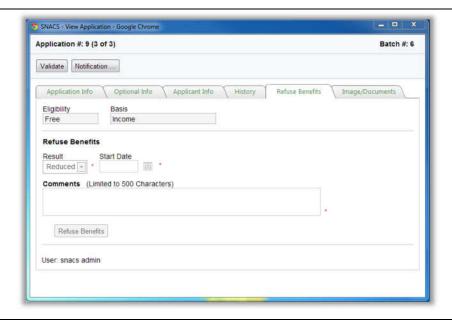


The **History** tab displays information regarding the determined eligibility for this application.

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

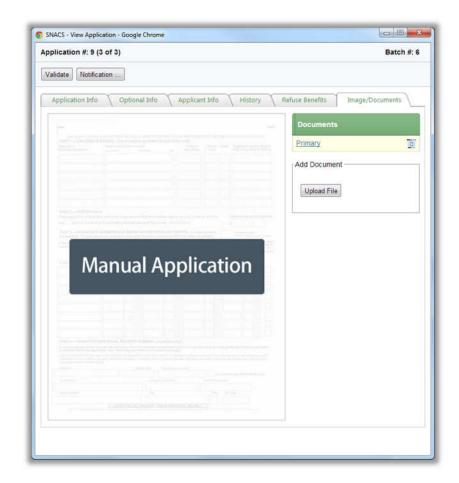




The **Refuse Benefits** tab is where refusal of benefits is recorded.

If a parent refuses benefits

- Select a Result.
- Select a **Start Date**.
- Enter up to 500 characters in <u>Comments</u> 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



#### To delete a document

- Click in a file listing.
- In the confirmation

  prompt, click OK ...

# **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 <b>New Direct Certification</b> page; use the <b>New Direct</b> 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.

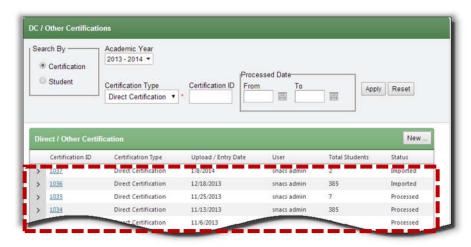
Table 3.3 Direct Certification Listings

# **Searching for Direct Certifications**



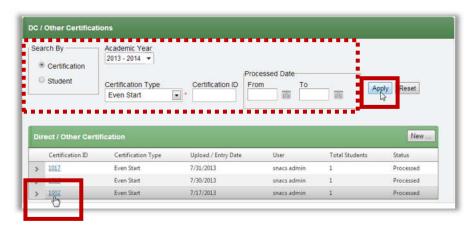
On the *DC / Other Certifications* page

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



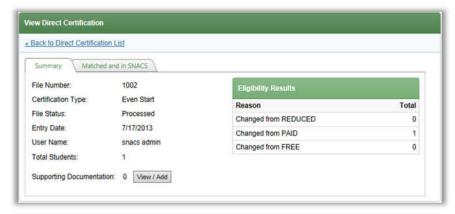
All approvals matching the selected criteria are shown in the **Direct / Other Certification** list.

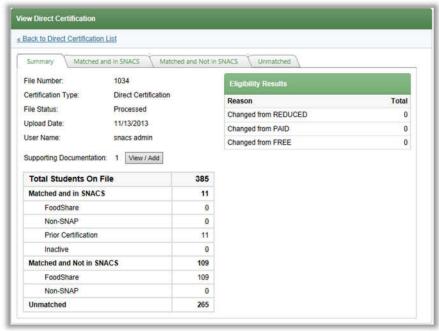
# **Displaying a Direct Certification**



On the *DC / Other Certifications* page

- Use search criteria to display a list of approvals.
- Click a <u>Certification ID</u> 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.

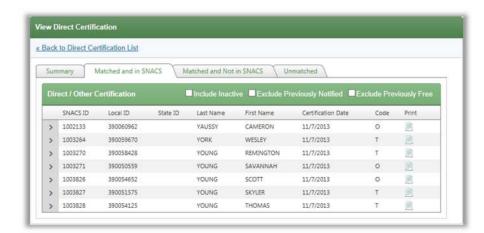
Available functions on the **Summary** tab include



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



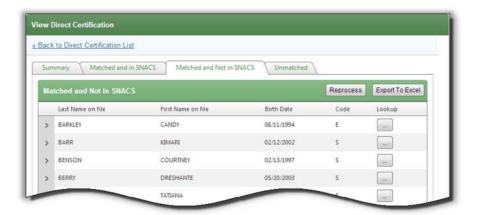
The **Matched and in SNACS** tab lists all records that should have benefits and matched a student record in SNACS.

#### 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; <b>Print</b> 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.

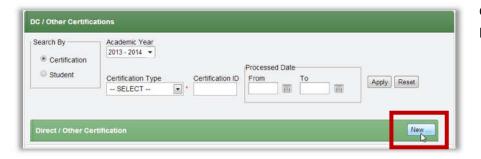
- Click to save the unmatched records to an MS Excel file.
- The Excel file can be used to research possible issues in student information submitted to DCF.

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.

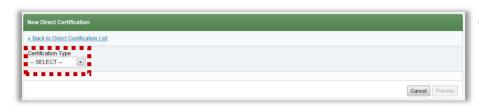
Table 3.7 Unmatched tab functions

# **Uploading a Certification File**



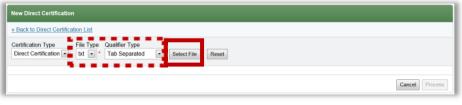
On the *DC / Other Certifications* page

Click New ...



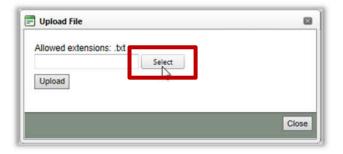
On the *New Direct Certification* page

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 Open ▼





#### In the **Upload File** popup

- Click Upload

# Note s

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

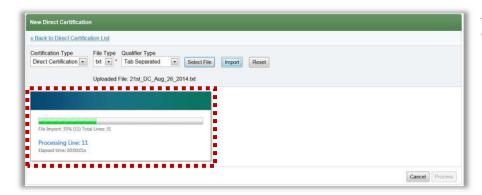
A "good" file with the correct format is indicated with a **green** bullet as shown in the first example.

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

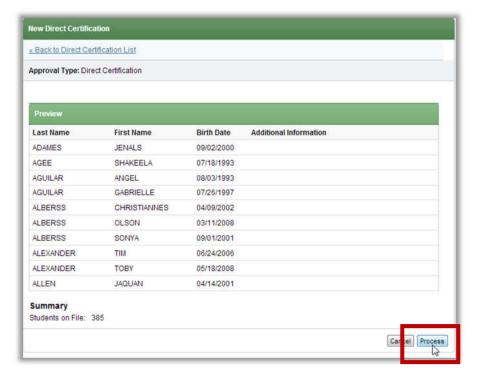


A message appears that displays the uploaded file name.

- Click Import



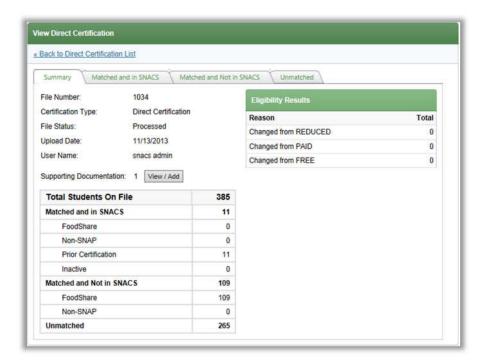
A progress indicator appears to display processing status.



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

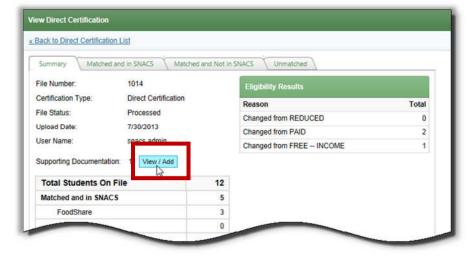
If the **Preview** looks correct:

- Click Process .



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

# **Adding Supporting Documents**

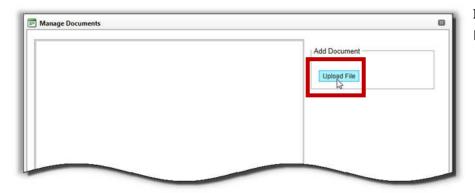


Display an approval for any type.

Click View / Add on the
 Summary tab.

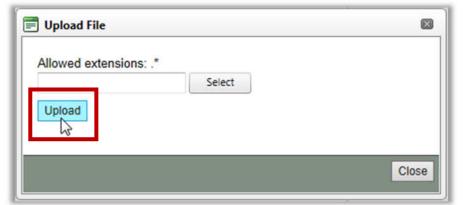
# O Note

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



#### In the Windows **Open** popup

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



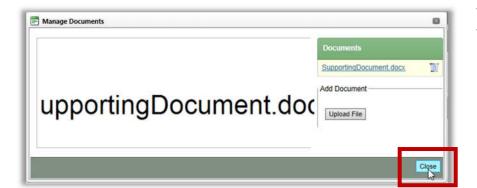
In the **Upload File** popup:

- Click Upload



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

- Click OK



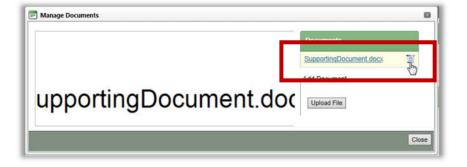
The document name appears in the **Documents** list.

# **Removing a Supporting Document**



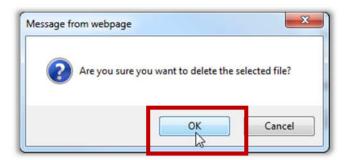
Display the **Summary** tab for a Direct Certification.

- Click View / Add



In the **Mange Documents** popup:

Click **Delete** ( [ ] )in a document listing.



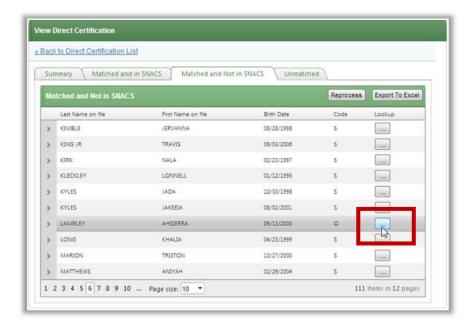
In the confirmation message

Click OK



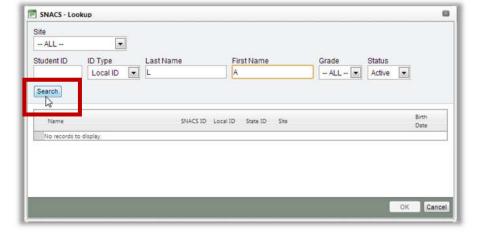
The document name is removed from the **Add Document** group.

# **Matching a Student Manually**



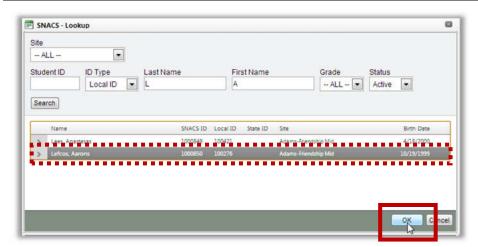
Display the **Matched and Not in SNACS** tab and

Click Lookup ( )in a student listing.



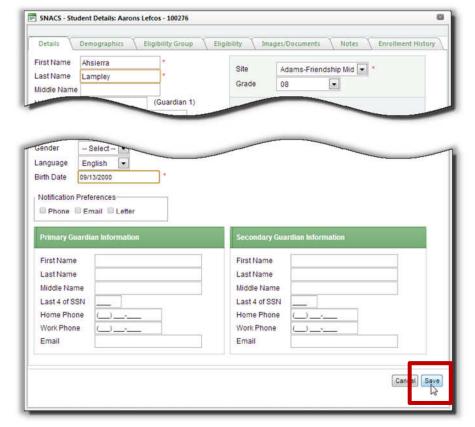
#### In the **SNACS - Lookup** popup

- Enter or select search criteria.
- Click Search



In the list of students that match the selected criteria

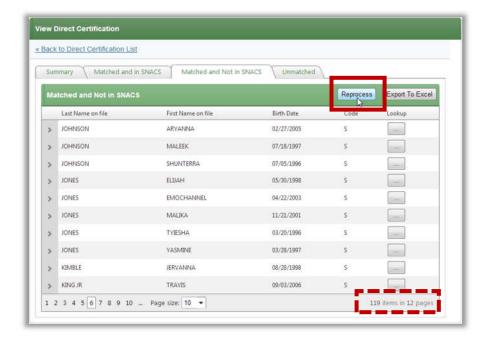
- Select a student.
- Click OK



#### In the **Student Details** popup

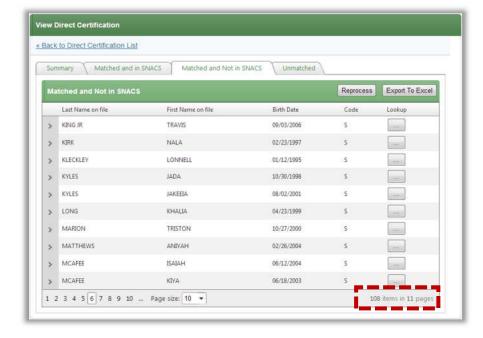
- Change name and birthdate information as needed on the **Details** and **Demographics** tabs.
- Click Save

# Reprocessing a File



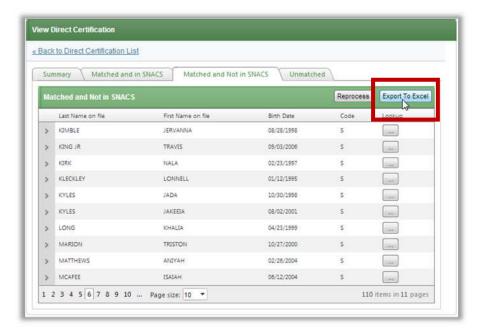
Display the **Matched and Not in SNACS** tab for a Direct Certification.

- Click Reprocess

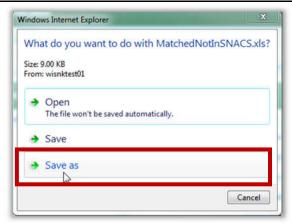


The number of matching students not in SNACS is updated when new matches are made through the reprocessing of the file.

#### **Exporting a File**



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



In the list of file options

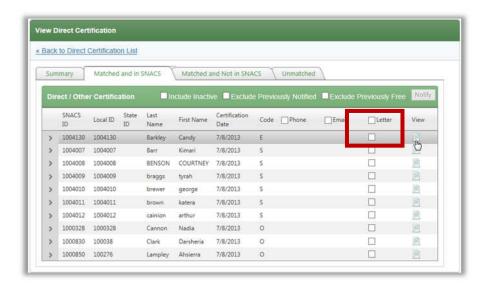
 Click Save as and enter a name for the file.



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**



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

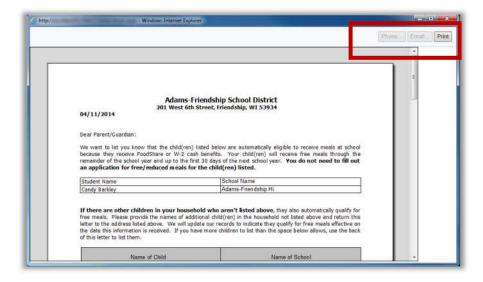
To view a single letter, click the icon under **View** to display a notification letter in the print window.

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





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

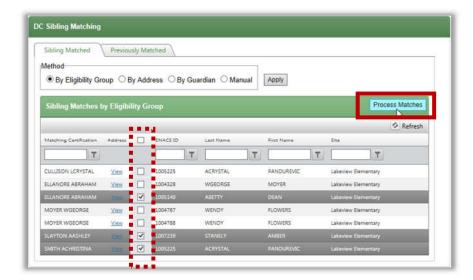
#### **Matching By Eligibility Group**

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



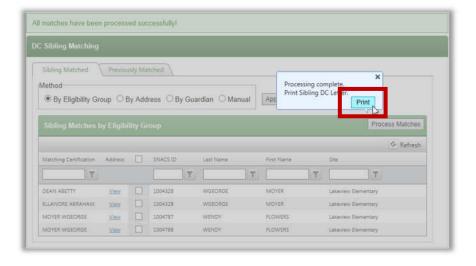
#### On the Sibling Matched tab

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



## In Sibling Matches by Eligibility Group

- Click <u>View</u> 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.

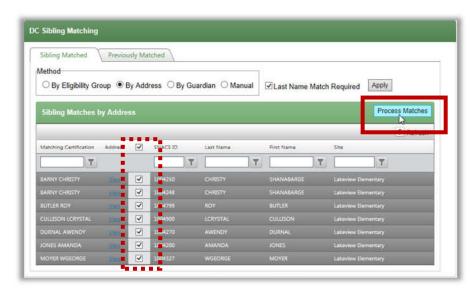
 Click Print to print notification letters for the matched students.

#### **Matching by Address**



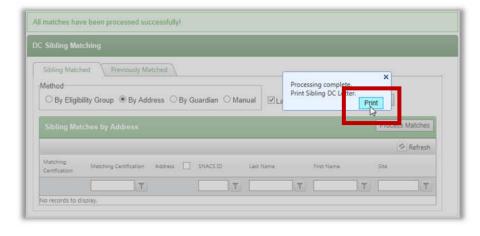
On the Sibling Matched tab

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



## In the **Sibling Matches by Address** group

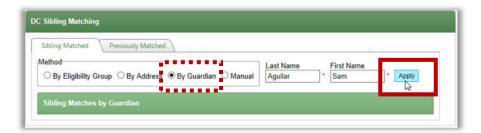
- If appropriate, select one or more options in the student listing(s) to process as a match, or select the option in the list header to select all listings.
- Click Process Matches



## The **Processing complete** popup appears.

 Click Print to print notification letters for the matched students.

#### Matching by Guardian



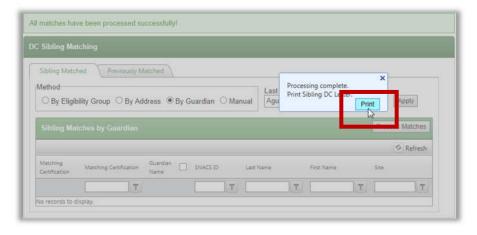
#### On the Sibling Matched tab

- 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.

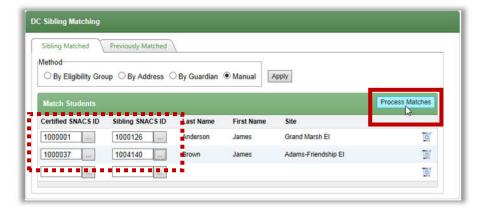
Click Print to print notification letters for the matched students.

#### **Matching Manually**



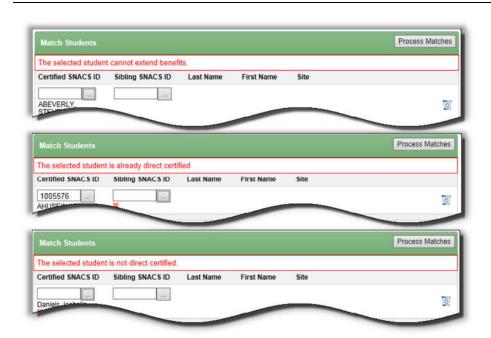
On the Sibling Matched tab

- Click Manual.
- Click Apply

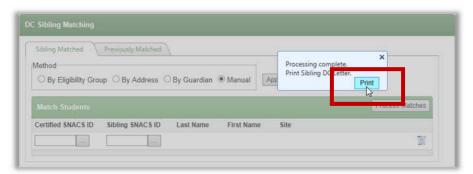


#### In the **Match Students** group

- 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.



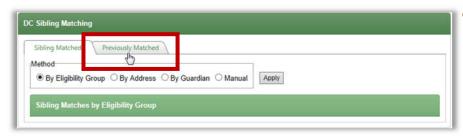
- Continue entering matches as needed; error messages appear when a match cannot be made; you must remove the listing before continuing.
- Click
   Process Matches



## The **Processing complete** popup appears.

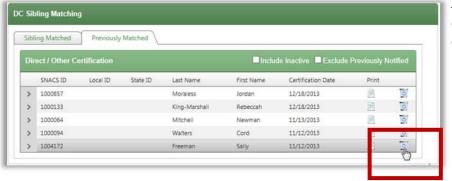
 Click Print to print notification letters for the matched students.

#### **Removing a Student from Certification**



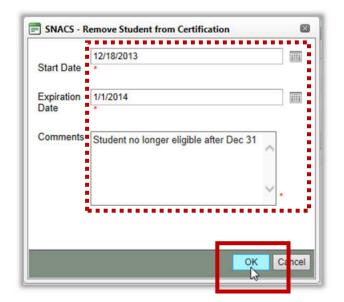
#### On the **DC Sibling Matching** page

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 .



## **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

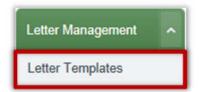
Menu Selection	Description
Letter Templates	Display Standard Letter Templates; save updates to the current Letter Template or save to a new file; set the Active Letter Template for a letter type.

#### 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 <u>one</u> 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**



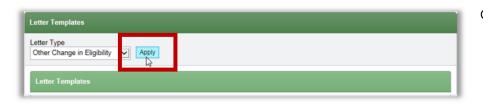
#### Table 4.2 Letter Templates Page Functions

#### **Displaying All Templates for a Letter Type**



On the Letter Templates page

Select a letter type.



On the Letter Templates page

Click Apply



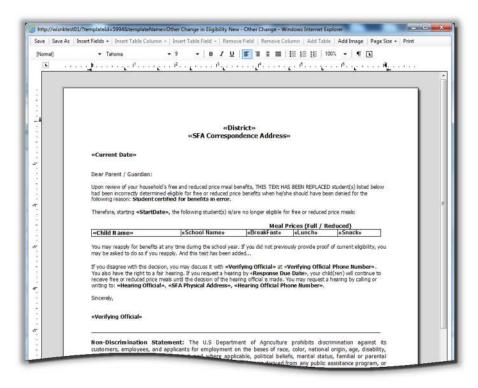
All available templates for the selected letter type are shown in the **Letter Templates** list.

#### **Viewing a Letter Template**



On the Letter Templates page

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



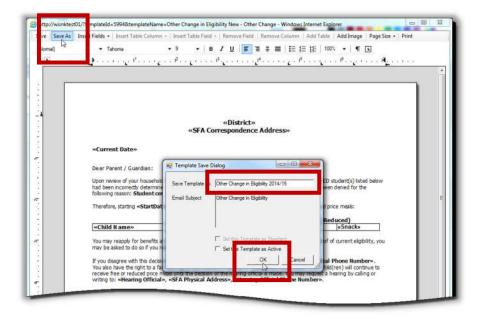
The letter template appears in the *Letter Template* window.

#### Adding a Custom Letter Template



On the Letter Templates page

 Click a <u>Template Name</u> link in the <u>Letter</u> <u>Templates</u> list.

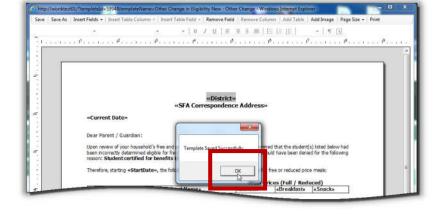


In the Template Letter window

Click Save As

In the Template Save popup

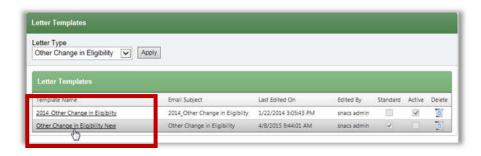
- In Save Template as, enter a name for the new template.
- Click OK



In the *Successful Save* message popup

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

#### **Editing a Letter Template**



On the Letter Templates page

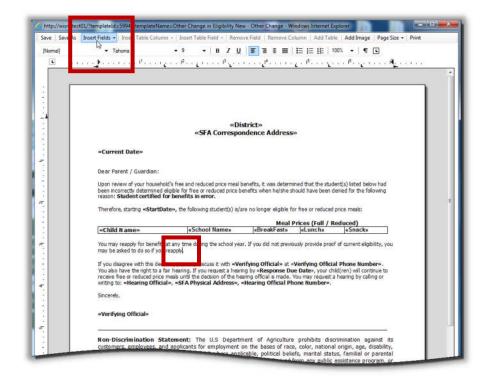
- Display a list of letter templates.
- Click a <u>Template Name</u> link.

#### 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

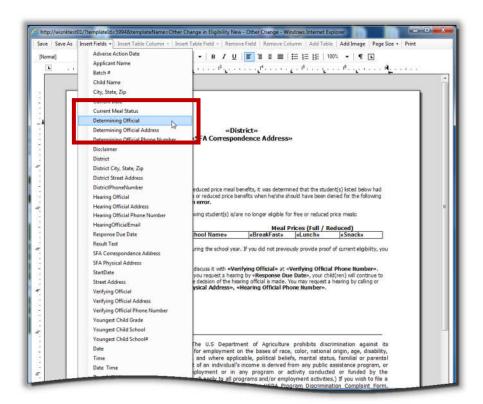
"<< >>" (angle brackets.

To Add a Data Field



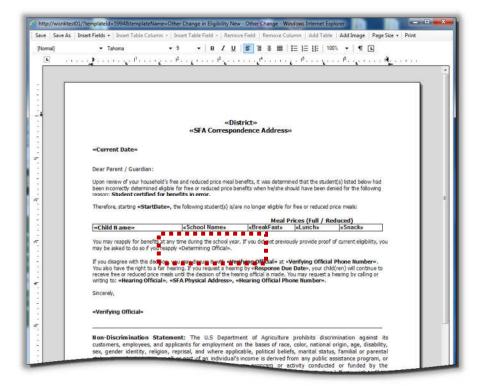
In the Letter Template window

- Place the cursor where the new data field is to appear.
- Click Insert Fields ▼
  on the window toolbar.



#### On the **Insert Fields** list

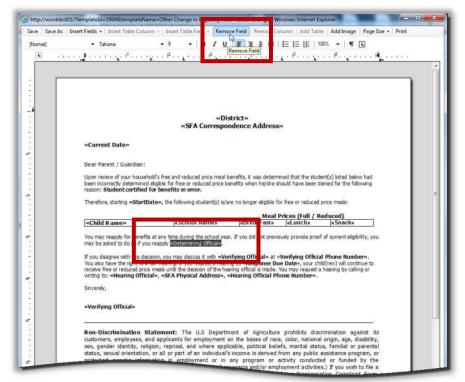
Click a data field name.



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



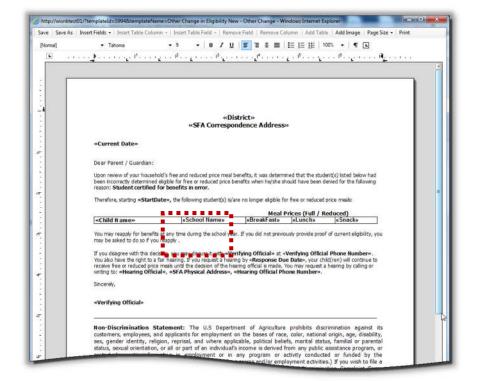
In the Letter Template window

- 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.



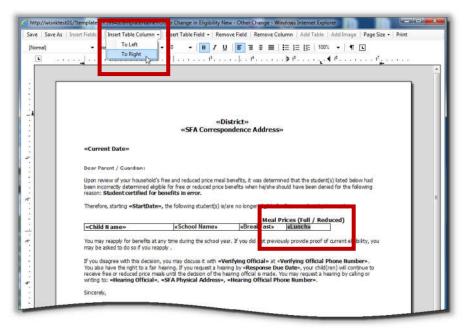
The data field is removed.

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

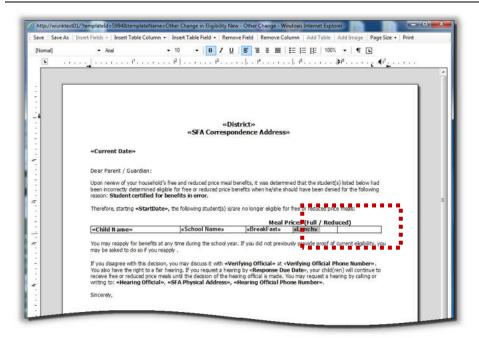


In the Letter Template window

- Place the cursor in a column where the new column is to appear.
- Click Insert Table Column and choose where the new column is to appear.

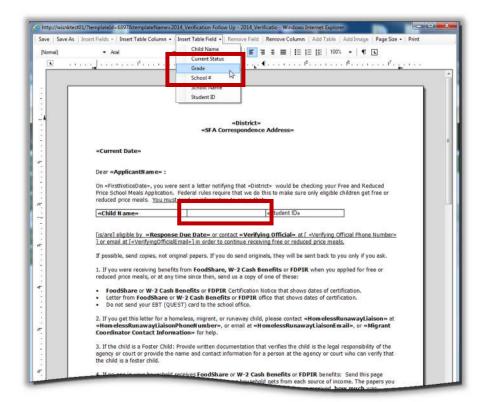
#### **♦** Note

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.



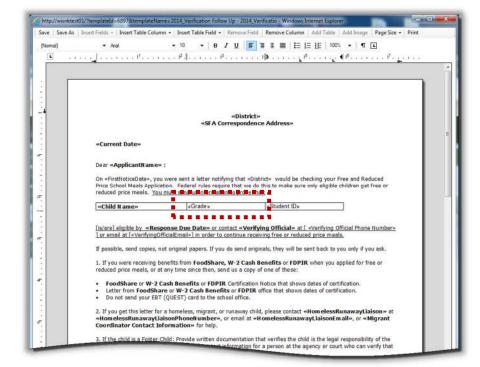
The new column appears in the table.

#### To Add a Data Field to a Table Column



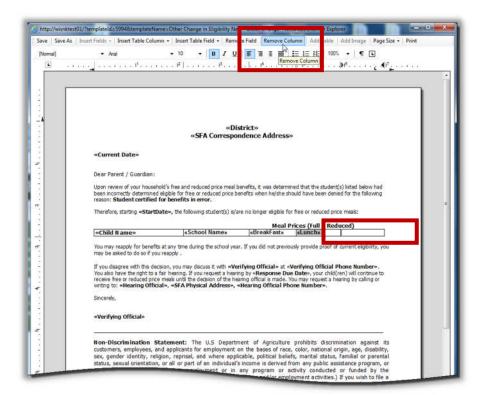
In the Letter Template window

- Place the cursor in the table column where the new data field is to appear.
- Click
   Insert Table Field 
   and choose the table field.



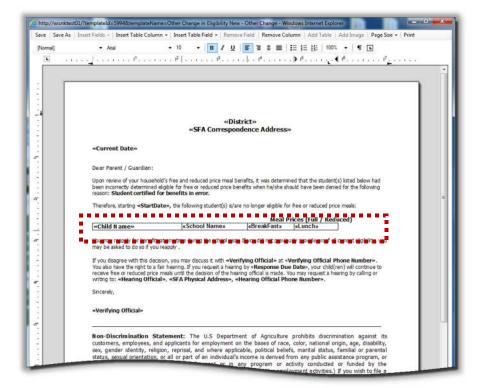
The new data field appears in the table column surrounded with "<< >>" (angle brackets).

#### To remove a Table Column



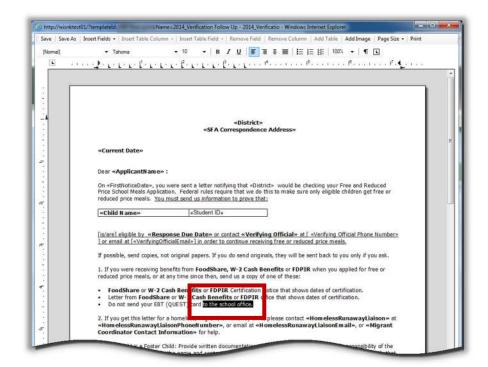
In the Letter Template window

- 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

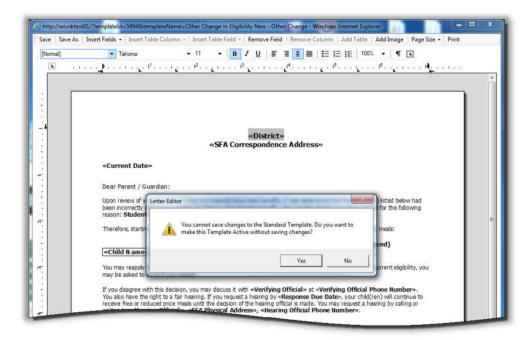


In the Letter Template window

 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

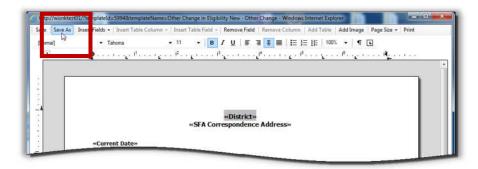
A Standard Letter Template cannot have changes saved directly to the template. A message appears to alert you.



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

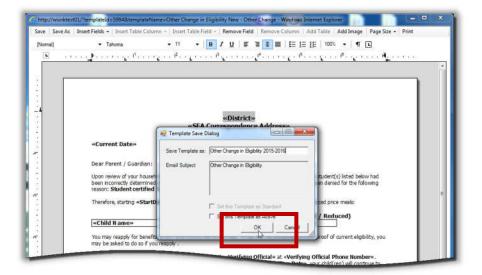
- Click No to then click Save As and save your changes to a new Custom Letter Template.
- Click **Yes** to discard your changes and change the Standard Template to the Active Template

#### Saving a Standard Letter Template to a New File



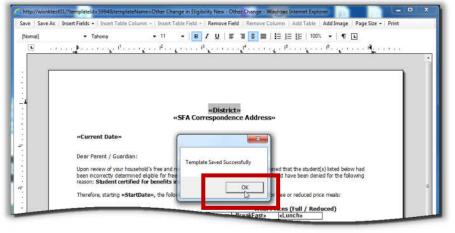
In the Letter Template window

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

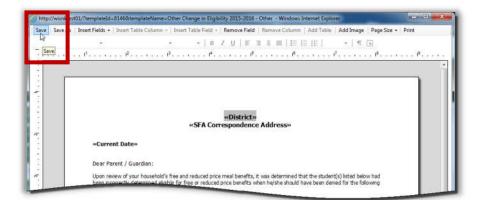


On the window toolbar

 Click Close ( ) to close the Letter Template window.

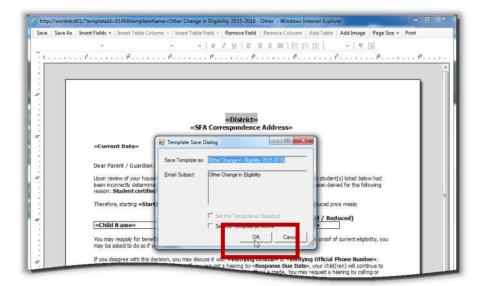
#### Saving Updates to a Custom Letter Template

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



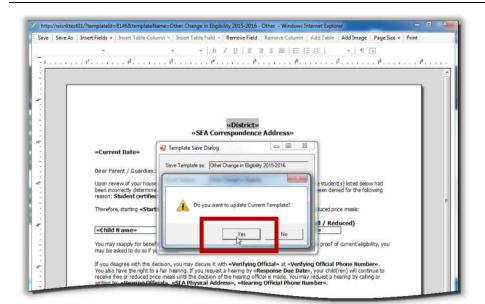
In the Letter Template window

Click Save on the window toolbar.



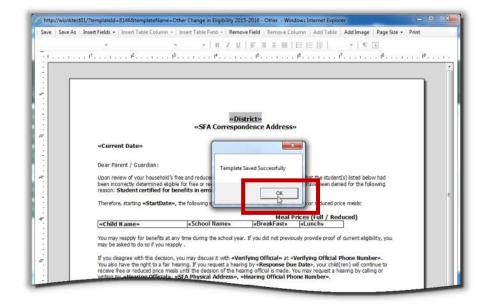
#### In the Save popup

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



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.

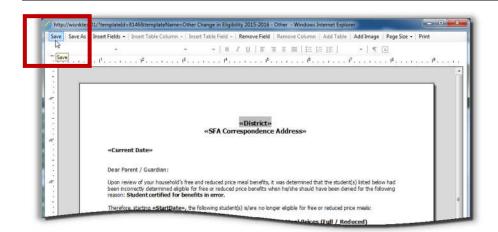
#### **Setting the Active Letter Template**

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.



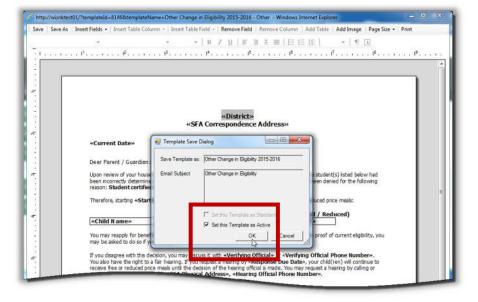
On the Letter Template page

- Display a list of template letters for a Letter Type.
- Click a <u>Template Name</u> link in the <u>Letter</u> <u>Templates</u> list.



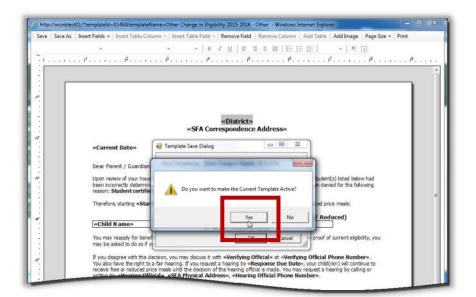
In the Letter Template window

Click either Save or Save
 As on the toolbar.



In the **Template Save** popup

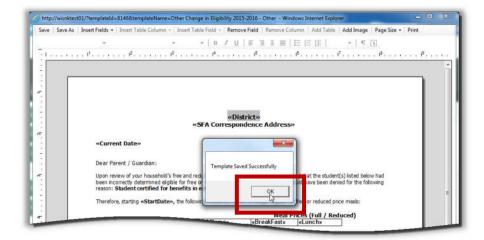
- Click Set this Template as Active.
- Click OK



In the confirmation popup

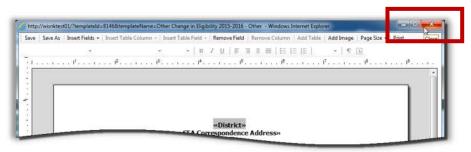
Click

Yes



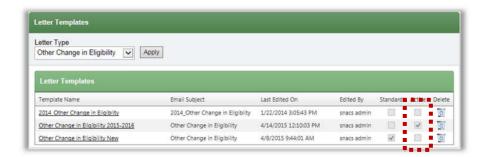
In the Save message

Click OK



On the window toolbar

 Click Close ( ) to close the Letter Template window.

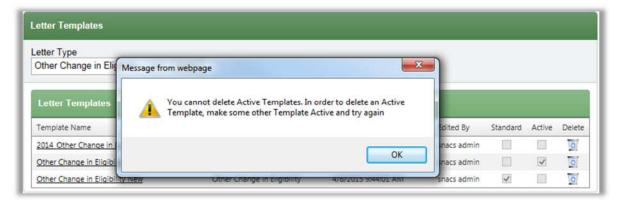


**Active** is now selected in the Letter Template listing on the *Letter Templates* page.

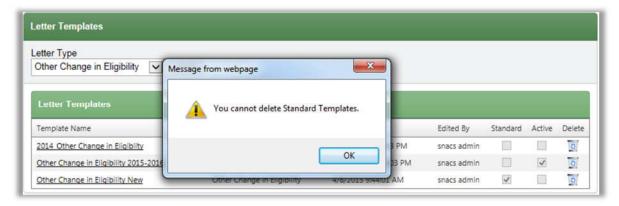
#### **Deleting a Letter Template**

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





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
<b>Application Processing</b>	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.

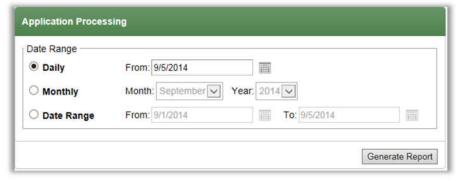
Table 5.1 Eligibility Reports Menu Selections

#### **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**

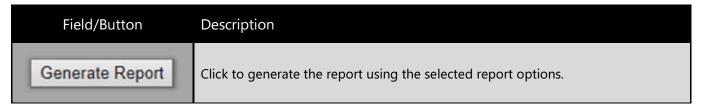
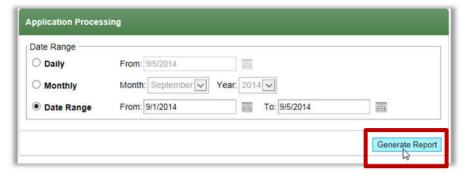


Table 5.2 Application Processing Page Functions

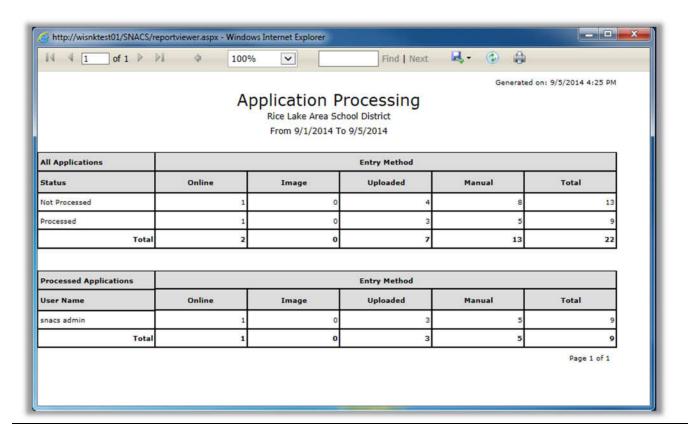
#### **Generating an Application Processing Report**



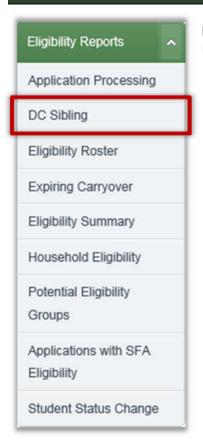
On the *Eligibility Summary* page

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

The Application Processing report appears in the report viewer window.



#### **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

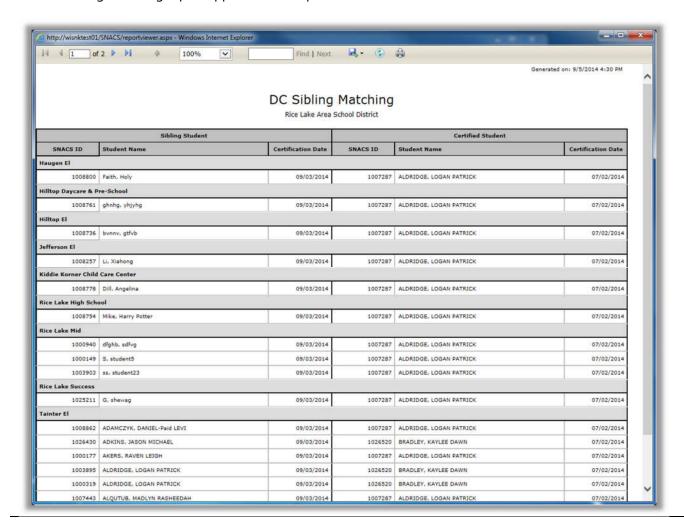
#### **Generating a DC Sibling Matching Report**



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

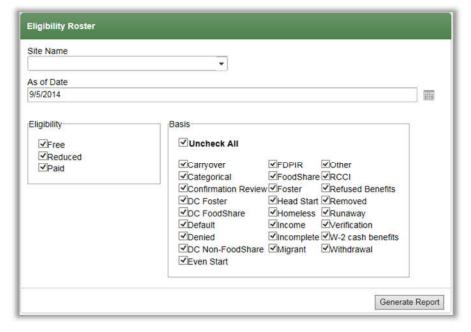
The DC Sibling Matching report appears in the report viewer window.



#### **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**

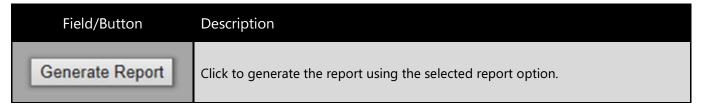
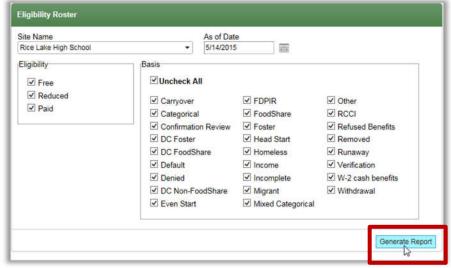


Table 5.4 Eligibility Roster Page Functions

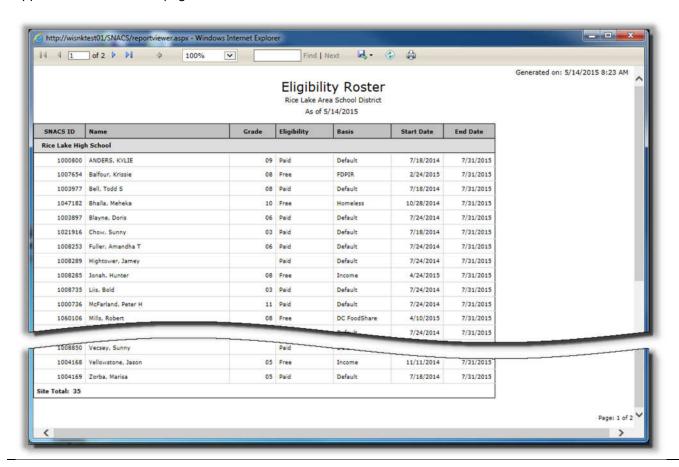
#### **Generating an Eligibility Roster Report**



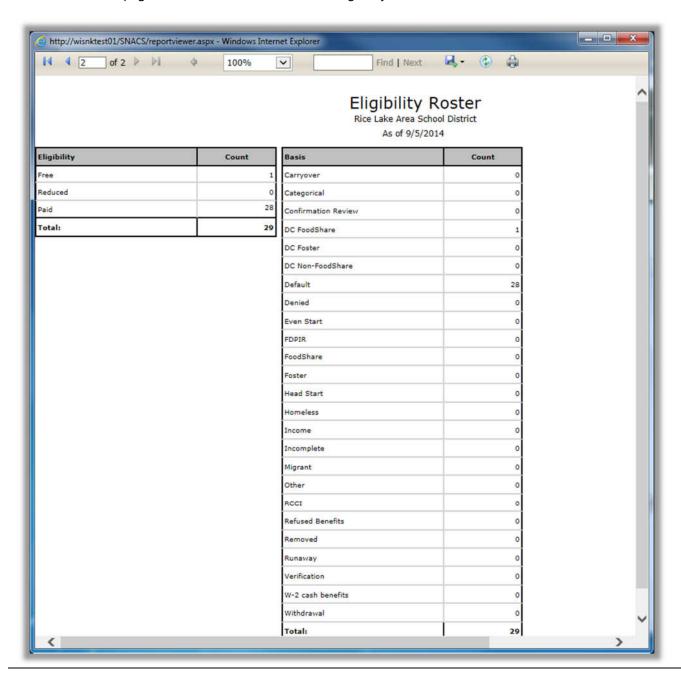
On the *Eligibility Roster* page

- 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.



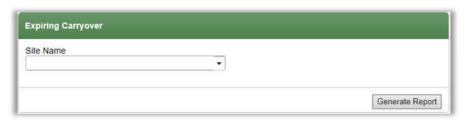
The second set of pages lists counts for each selected Eligibility and Basis.



# **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.



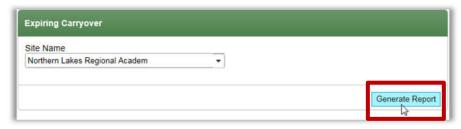
By default on the *Expiring Carryover* page

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

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

Table 5.5 Expiring Carryover Page Functions

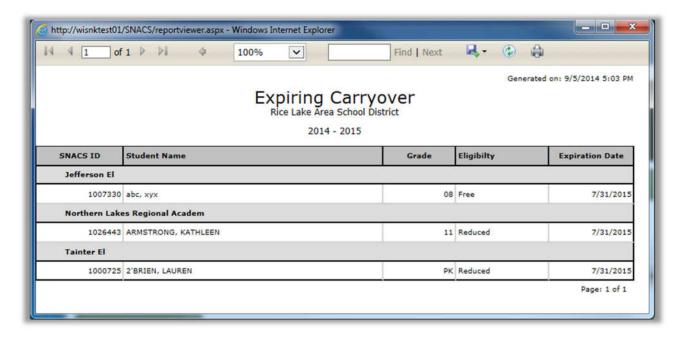
# **Generating an Expiring Carryover Report**



On the Expiring Carryover page

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

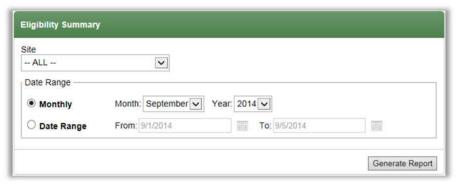
The Expiring Carryover report appears in the report viewer window.



# **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.

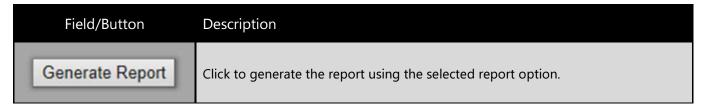
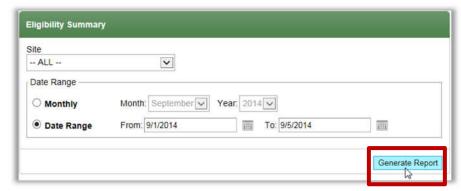


Table 5.6 Eligibility Summary Page Functions

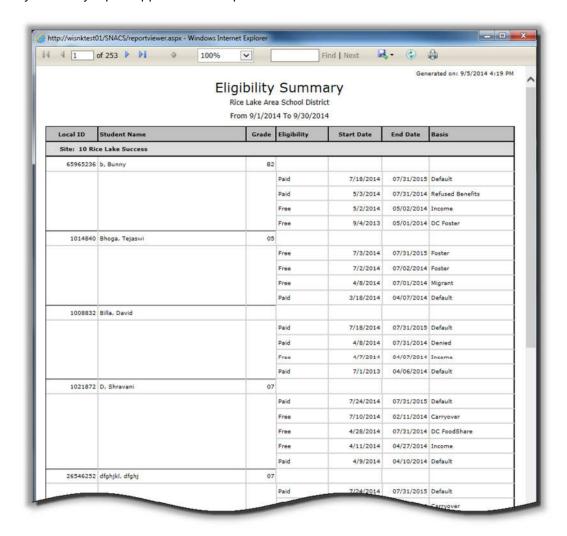
#### **Generating an Eligibility Summary Report**



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.



# **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.

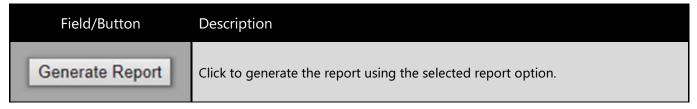
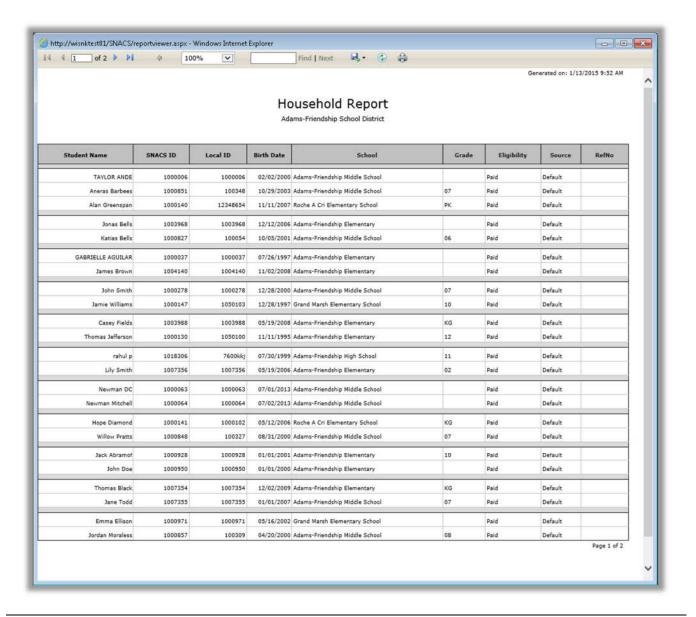


Table 5.7 Household Eligibility Page Functions

#### **Generating a Household Eligibility Report**



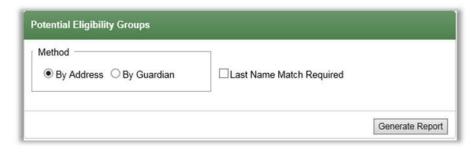
The Household Eligibility report appears in the report viewer window. Household groups appear between the formatted lines.



# **Potential Eligibility Groups**

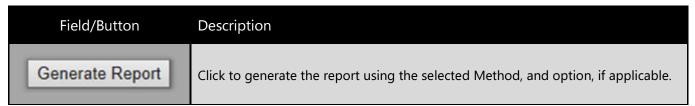


**Potential Eligibility Groups** lists students with the same address or same guardian name, but different Household IDs for active students.



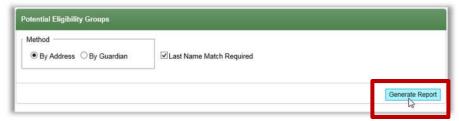
By default on the *Potential Eligibility Groups* page

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



**Table 5.8 Potential Eligibility Groups Functions** 

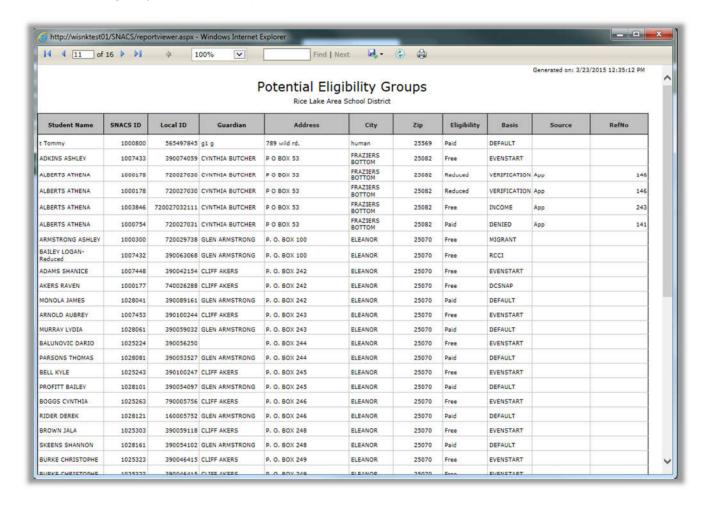
#### **Generating a Potential Eligibility Groups Report**



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.



# **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.

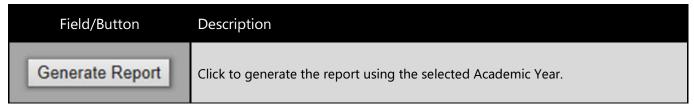


Table 5.9 Applications with SFA Eligibility Functions

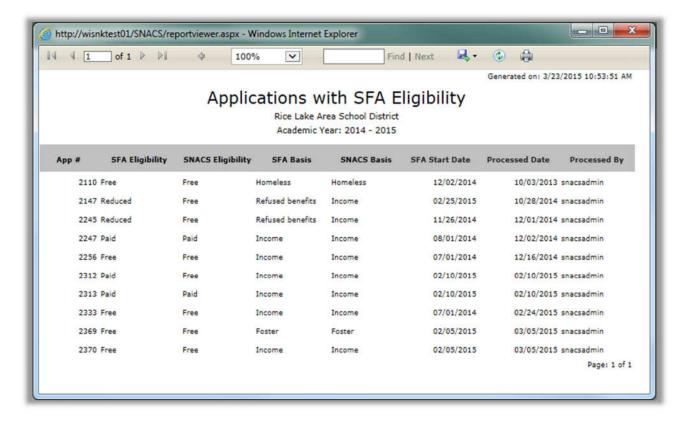
#### **Generating an Applications with SFA Eligibility Report**



On the Applications with SFA Eligibility page

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

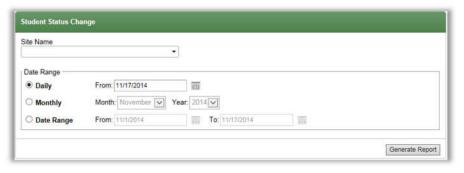
The Applications with SFA Eligibility report appears in the report viewer window.



#### **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.

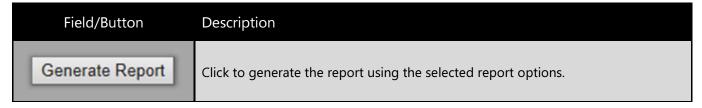
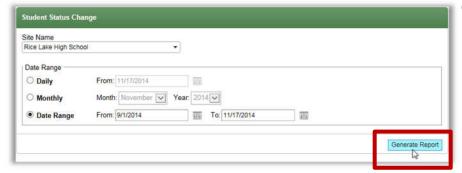


Table 5.10 Student Status Change Page Functions

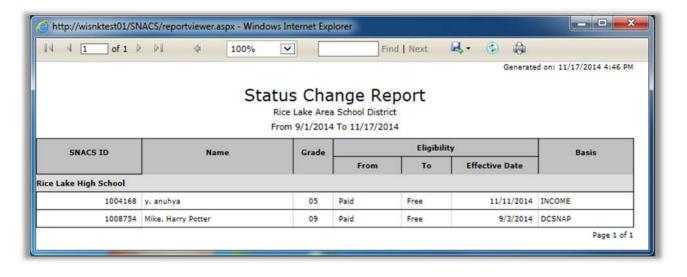
#### **Generating a Student Status Change Report**



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.



∢ 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 1<sup>st</sup> 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



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 1<sup>st</sup>, 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.

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;

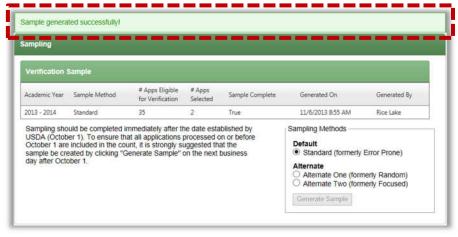
**Table 6.2 Sampling Page Functions** 

#### **Generating a Sample Pool**



On the Sampling page

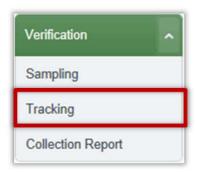
- In the Sampling Methods group, choose a method, if needed.
- Click Generate Sample



A success message appears.

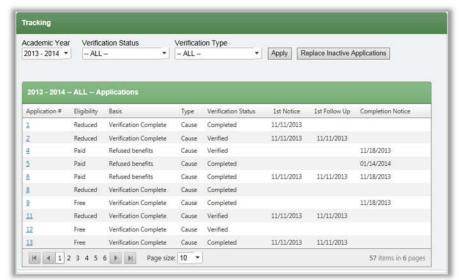
A listing for the completed sample appears in the **Verification Sample** list.

#### **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.



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.

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

**Table 6.3 Tracking Page Functions** 

# **Verification Status**

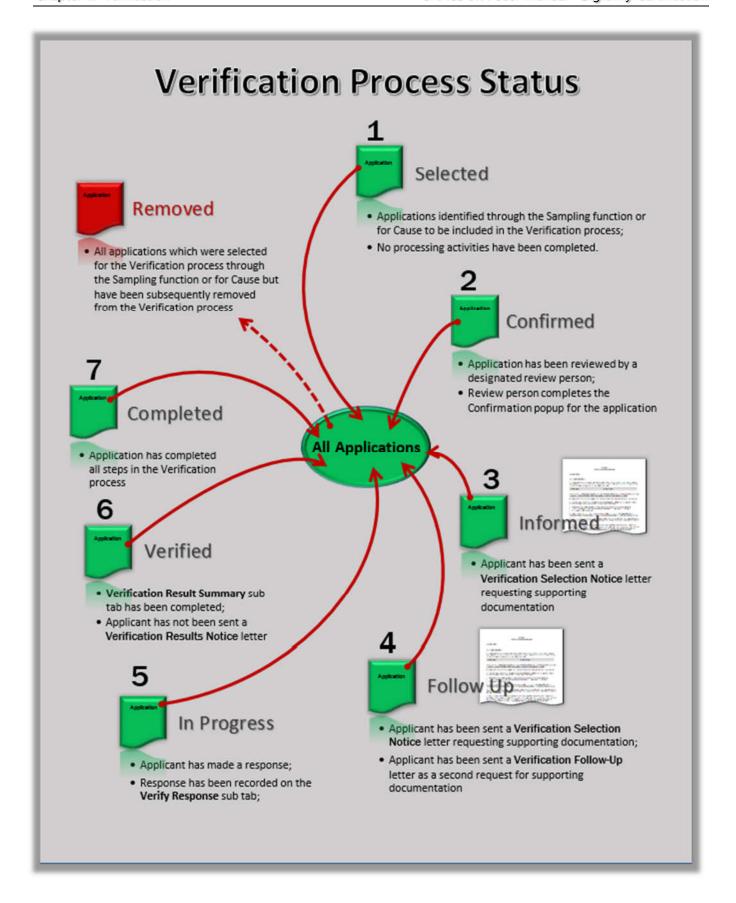
As the application moves through the verification process, the application Verification Status changes.

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

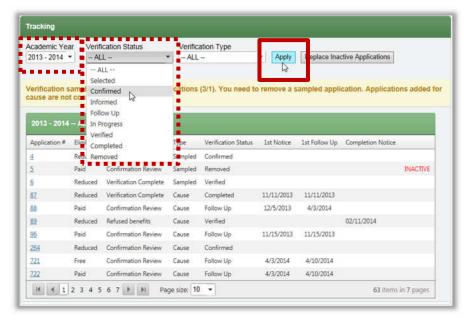
See the Verification Status table below for a description of each status.

Selection	Description
All	<ul> <li>All applications in the verification process with any status; this includes applications selected</li> <li>Through the Sampling function, or</li> <li>By clicking Add For Verification on the Application Info tab in the View Application window to Verify for Cause.</li> </ul>
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 <b>Verification Selection Notice</b> 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 <b>Verify Response</b> sub tab of the <b>Verification Response</b> tab in the <i>View Application</i> window; however, more information is needed before the <b>Verification Result Summary</b> sub tab can be completed; multiple responses can be recorded on the <b>Verify Response</b> sub tab.
Verified	All applications that have a recorded result on the <b>Verification Result Summary</b> sub tab of the <b>Verification Response</b> tab in the <i>View Application</i> 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

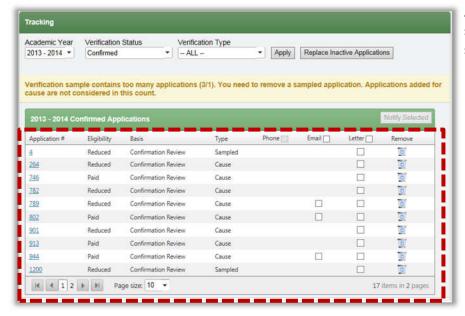


# **Displaying Applications by Verification Status**



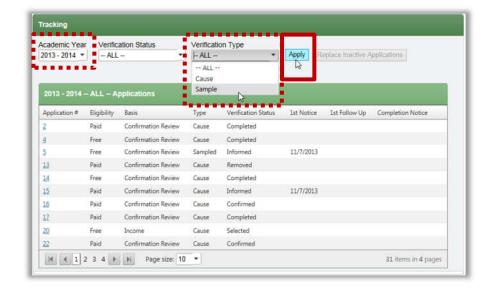
On the Tracking page

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



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 .



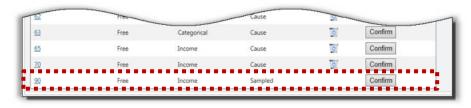
In an application listing

• Click **Delete** ( [2] ).



# 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.

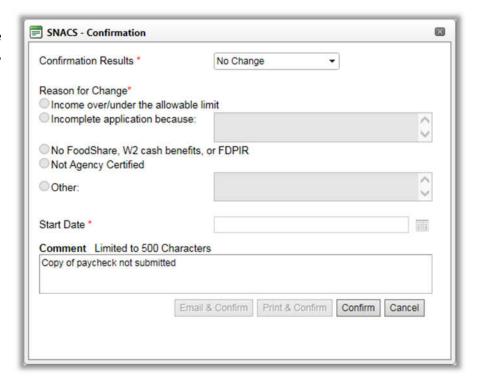
#### **Confirming an Application**

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



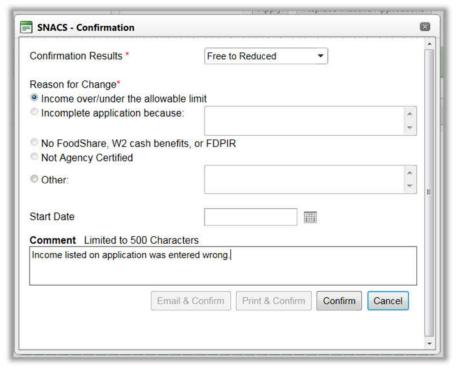
When "Free to Reduced" is selected in **Confirmation Results**, two **Reason for Change** options are available. **Comments** are optional.

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.



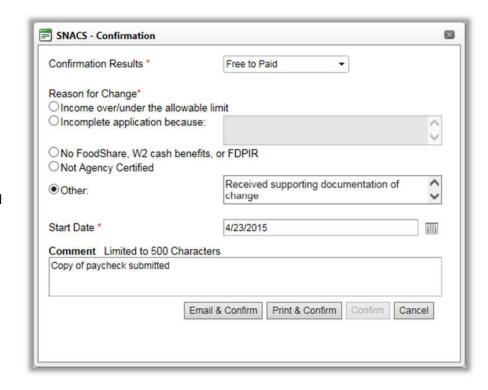
When "Free to Paid" is selected in Confirmation Results, all Reason for Change options are available and one must be selected. A Start Date and Comments must be selected/entered.

Notification is required, therefore the available actions include:

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

when no email address is provided.

Either or both types of notification can be sent.



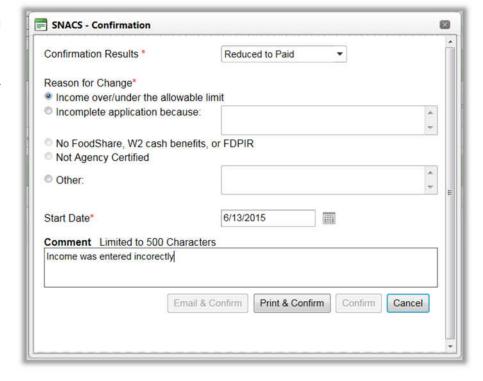
When "Reduced to Paid" is selected in **Confirmation Results**, only two **Reason for Change** options are available and one must be selected. A **Start Date** and **Comments** must be selected/entered.

Notification is required, therefore the available actions include:

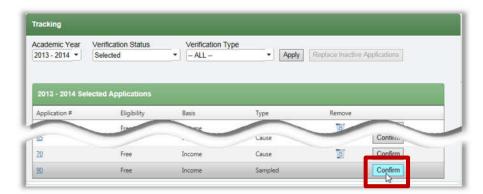
when an email address is provided in the student record, and/or

Print & Confirm when no email address is provided.

Either or both types of notification can be sent.

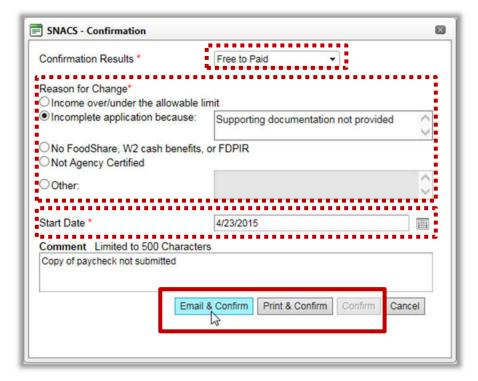


#### To confirm an application



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.

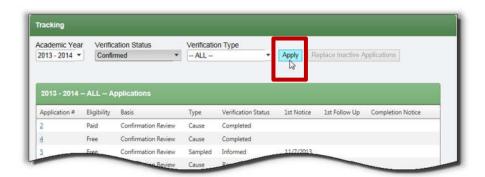


The application is removed from the list.

# Sending 1<sup>st</sup> Notification

Applicants are provided twice with notification of the verification selection—1<sup>st</sup> Notice and 1<sup>st</sup> 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

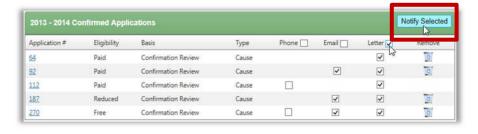
- Select "Confirmed" in Verification Status.
- Click Apply





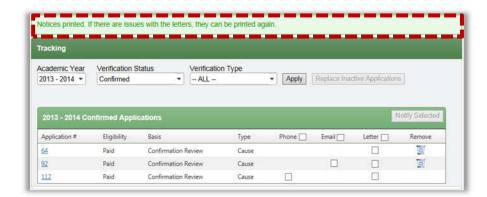
Select one or more methods of notification by either

- 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**

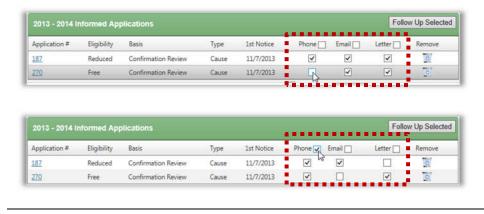
Follow Up notification is sent when no response is received from the applicant within the defined number of days after the 1<sup>st</sup> notification has been sent.

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



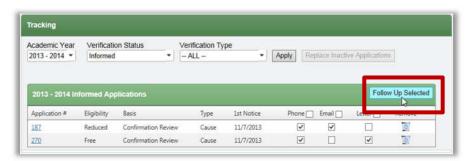
To view all informed applications

- Select "Informed" in Verification Status.
- Click 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 Follow Up Selected

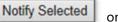


A print message appears.

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

#### **Processing Notification**

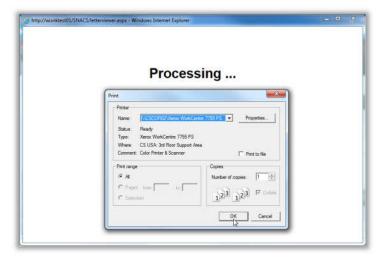
After selecting the type of notification to be used for a batch or application, clicking



Follow Up Selected

starts notification processing. Responses for each type depends on the selected type.

#### Letter Notification



Letter notification appears with the Print popup.

OK Click 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 .



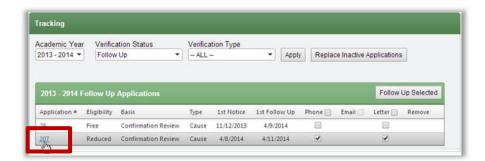
Phone notification is complete when the popup confirmation message appears.

- 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.

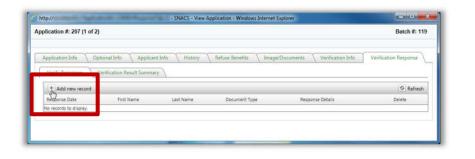


To view all applications that are waiting for a response

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

In the list of applications

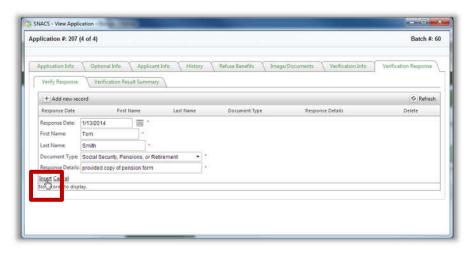
 Click the <u>Application #</u> link in an application listing.



The *View Application* window opens.

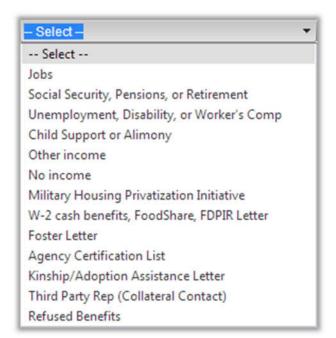
On the **Verify Response** tab

 Click Add new record to display a response form.



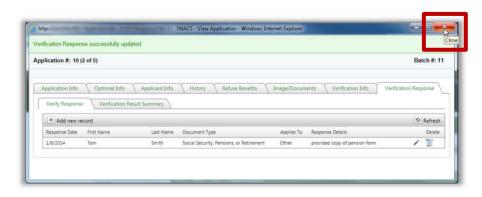
In the response form

- 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.



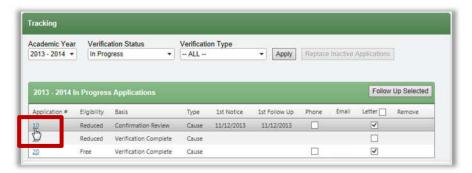
An update success message appears. The new response appears in the response list.

Close the window.

#### **Recording the Verification Result Summary**

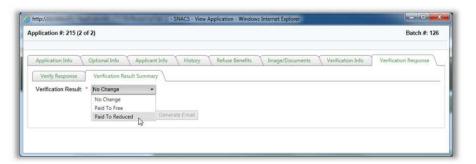
When the verification for an application has been determined, the result is recorded on the application. Saving the Verification Result changes the application status to "Verification Complete." No new responses or results can be recorded.

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



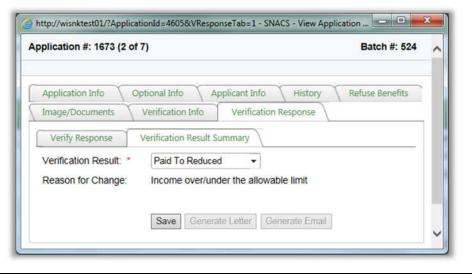
On the Tracking page

- Display all applications that are "In Progress."
- Click an <u>Application #</u> link in an application listing.



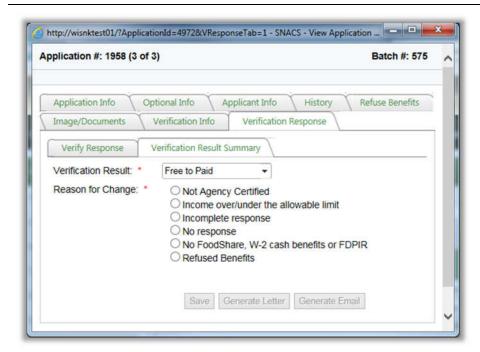
In the **View Application** window

 Select the Verification Result from the available selections.

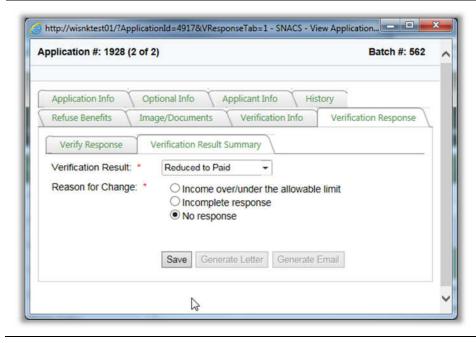


When you select a Verification Result, a **Reason for Change** may appear.

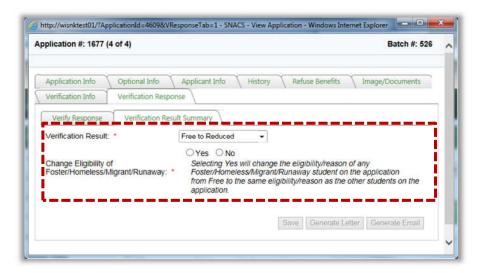
In this first example, no further selections are required before saving the verification result.



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



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

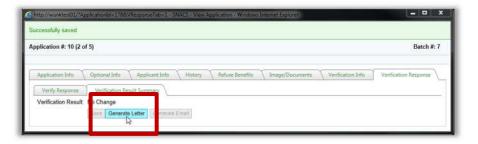


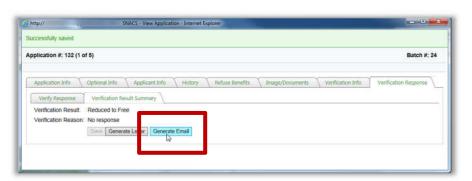
When foster, migrant, runaway, and/or homeless children are included on an application, their eligibility/reason can also be changed to match the status of other children on the application or left as is. A "Yes" or "No" response is required before the verification result can be saved.



In the View Application window





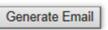


A success message appears.

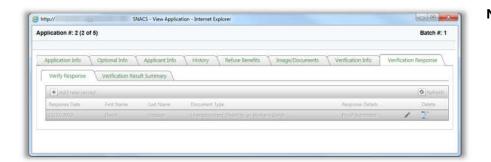
To generate notification after saving

- 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 the applicant included an email address with the application.

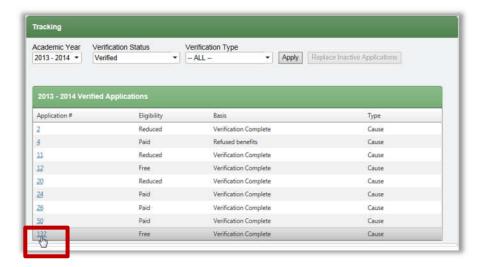


button is available only when



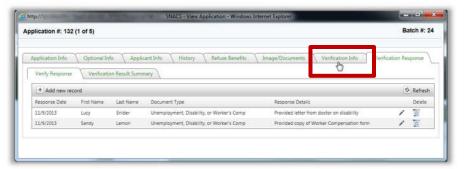
Note: After saving the Verification Result, all functions on the Verify Response sub tab become unavailable.

# **Viewing Application Verification Information**



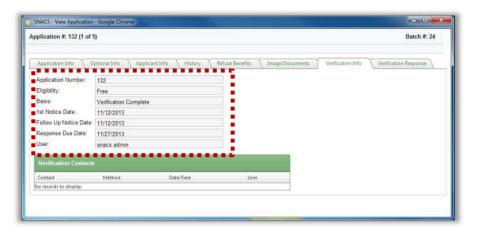
On the *Tracking* page

 Click an <u>Application #</u> link in an application listing.



In the View Application window

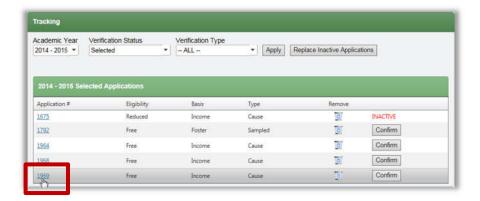
 Click the Application Info tab.



The current verification information for the application is listed.

# **Refusing Benefits**

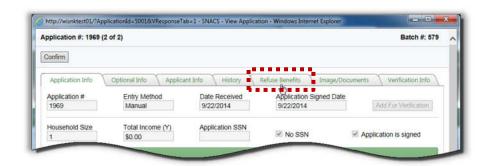
An applicant may choose to refuse assigned benefits. This process is completed in the *View Application* window on the **Refuse Benefits** tab.



On the Tracking page

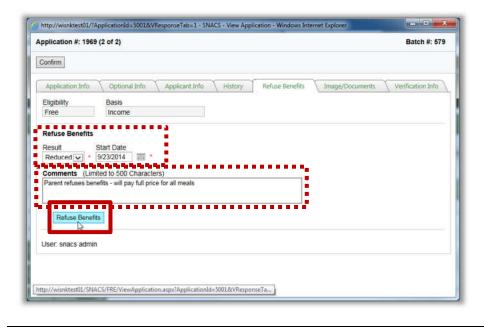
 Click an <u>Application #</u> link in an application listing.

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



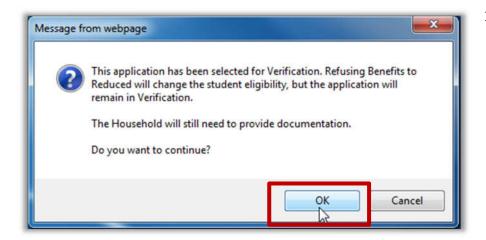
In the View Application popup

 Select the Refuse Benefits tab.



On the Refuse Benefits tab

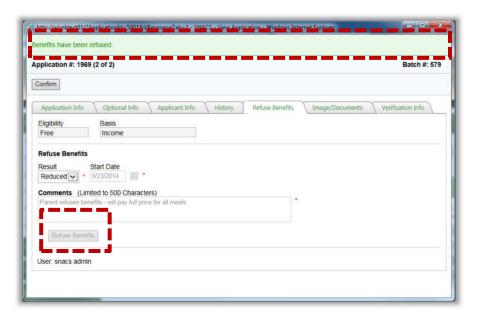
- Select a Result.
- Select a **Start Date** on which the new Eligibility is to begin.
- Enter comment text in Comments.
- Click Refuse Benefits



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.

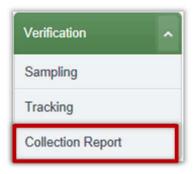
The Refuse Benefits button is no longer available.

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**

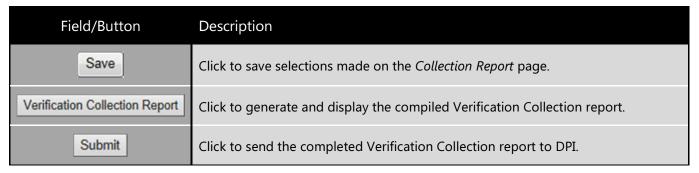
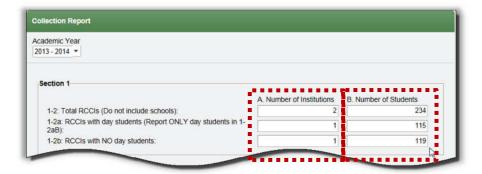


Table 6.5 Collection Report Page Functions

# **Completing Collection Report Data**

#### Section 1

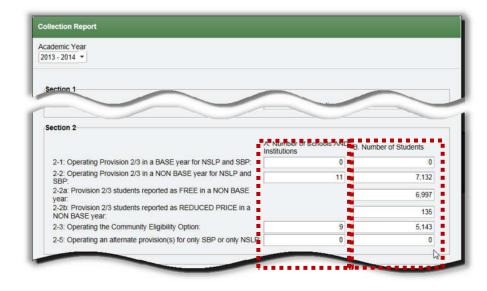


If your SFA includes one or more RCCIs (Residential Child Care Institutions), Section 1 is shown and you must provide totals for

# A. Number of Institutions andB. 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



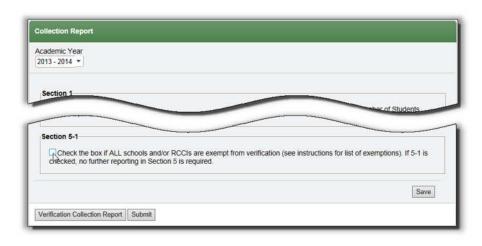
Section3 is shown for all SFAs.

- 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.

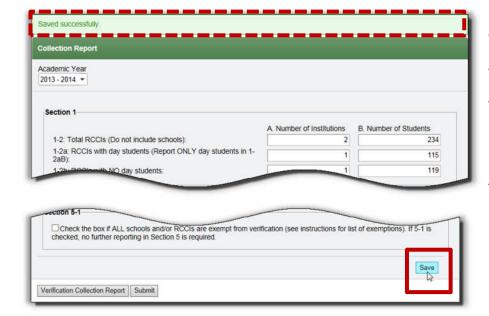
#### Section 5



Section 5 is shown for all SFAs.

 Select the checkbox if appropriate for your SFA.

# Saving



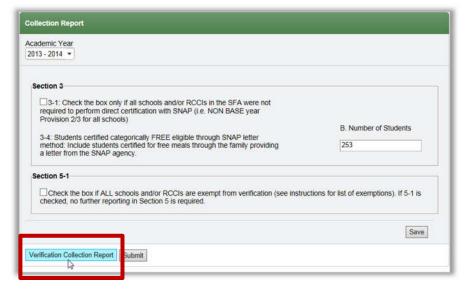
Entered data can be saved as often as needed. All data does not have to be complete to save the data.

To save entered data



A save success message appears.

# **Generating and Printing a Collection Report**



On the Collection Report page

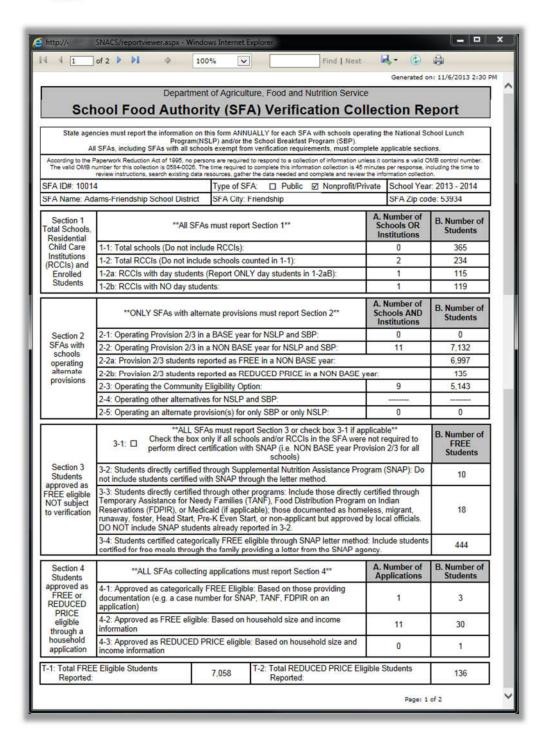
Click

Verification Collection Report

The completed Collection Report appears in the Print window.

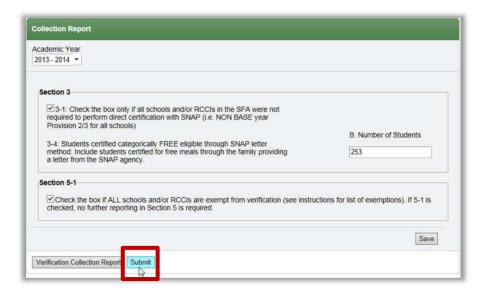
# To print the report

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



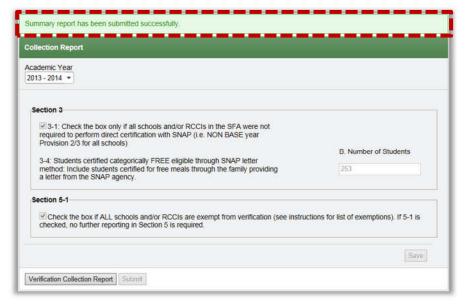
# **Submitting a Collection Report**

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".

# 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 1<sup>st</sup> 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 >>