Texas Department of Agriculture Food Distribution Program User Manual

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1.0 Food Distribution Program

1.1 Purpose/Overview

The purpose of the Texas Unified Nutrition Programs System (TX-UNPS) user manual for the Food Distribution Program (FDP) module is to provide a general understanding of how to use the website to perform FDP module functions effectively and efficiently.

1.2 Website Benefits and Features

The FDP module is a user-friendly application that allows authorized users to submit and approve applications, claims, and miscellaneous forms. Key system features include:

- A software system that manages information regarding Contracting Entities, applications, claims, and reports.
- A single integrated database which serves all child nutrition programs.
- The ability to save partially completed forms online, allowing the user to complete the process at a later time.
- Individual User IDs and passwords for secure login to program functions and accurate tracking of user behavior.
- A robust security module that streamlines security setting controls by enabling administrators to easily assign users to numerous pre-defined groups and eliminating the need to manually set each user's security access.
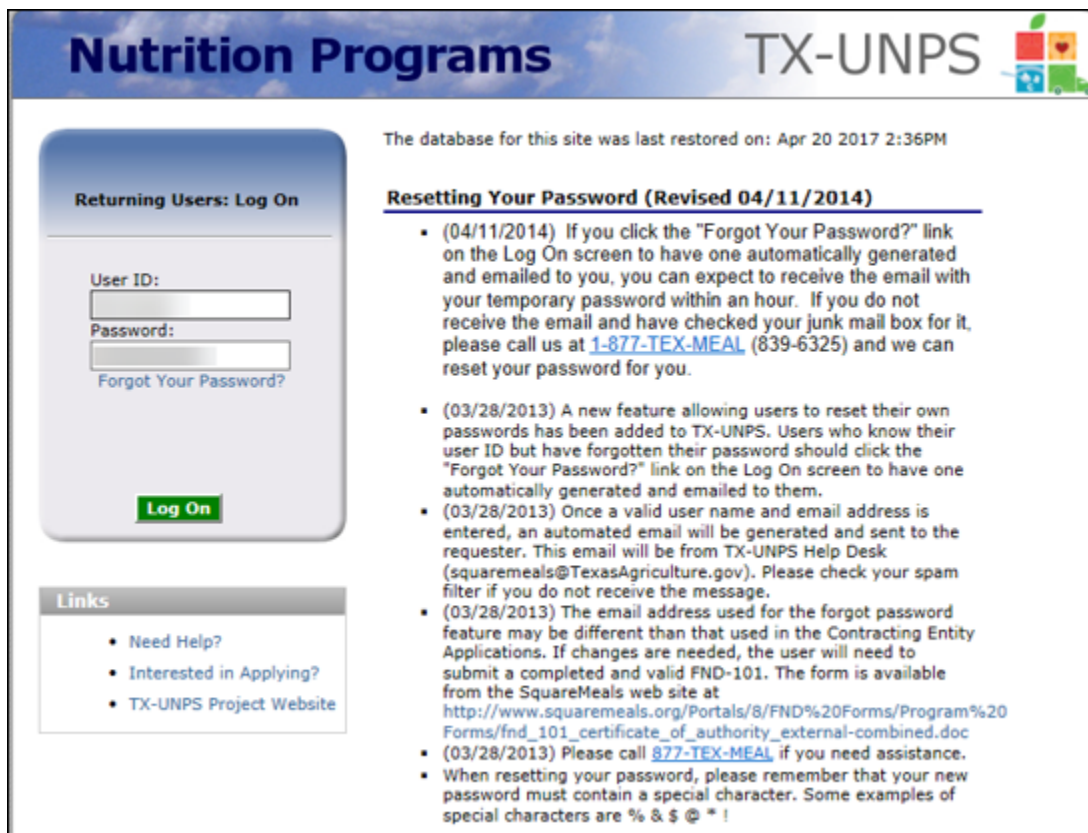
2.0 Accessing the Website

Before using the **Food Distribution Program (FDP)** module, a user ID and password must be assigned that provides the required security privileges. Once this setup is complete, the user may use the Internet, assigned user ID and password to access and log onto the website.

The system can be accessed from any computer connected to the Internet by opening the browser and entering the designated URL in the browser's address line: http://txunps1.texasagriculture.gov/TXUNPS.aspx.

Helpful Tips

Tip: Add the URL to the browser's Favorites list or create a shortcut to the website on the desktop for quicker access to the site. Refer to the browser and operating system help files for further information.

Figure 1: TX-UNPS Home Page

2.1 TX-UNPS Home Page

The TX-UNPS home page consists of three major sections:

- Bulletin board – managed by the Texas Department of Administration and provides general information or displays current messages that are viewable by the public.
- Log On – allows authorized users to enter their User ID and password. If users have forgotten their password, they can request a new temporary password be automatically generated by TX-UNPS and emailed to the address associated with their profile.
- Links – provides access to websites and additional information:
  - Selecting the **Need Help?** link will transfer the user to a webpage that contains the TX-UNPS User Manuals and other program resources. The user can also send a request for a User ID and password or for support.
  - Selecting the **Interested in Applying?** link will transfer the user to a webpage that provides additional information on the nutrition programs offered and allow the user to submit a request for an application.
  - Selecting the TX-UNPS Project Website link will transfer the user to the project's website.

2.2 Logging On

2.2.1 Logging On

Use the Log On section of the homepage:

1. Enter the assigned **User ID**.
2. Enter the **Password**.
3. Select **Log On**.

Returning Users: Log On

User ID:

Password:

Forgot Your Password?

Log On

Links
- Need Help?
- Interested in Applying?
- TX-UNPS Project Website

Figure 2: Login Screen

2.2.2 Changing Your Password

If this is the user's first time logging on, the system will automatically require the password to be changed.

1. Select a new **password** and enter it into the box provided.
2. Re-enter the **new password** for confirmation.
3. Select **Save**.

Please Note: Security configuration settings generally require a password eight (8) to twelve (12) characters in length. Please note that the password must be at a minimum eight (8) characters in length. Passwords are case-sensitive.

The password must contain at least:

- One numeric character.
- Once special character (e.g., $, ?, !).
- One uppercase character.

For security reasons, the system will automatically log the user out after twenty (20) of inactivity.

2.3 TX-UNPS Programs Menu Page

After logging in, the TX-UNPS Programs page is displayed. Access to specific modules is based on the user's security rights.
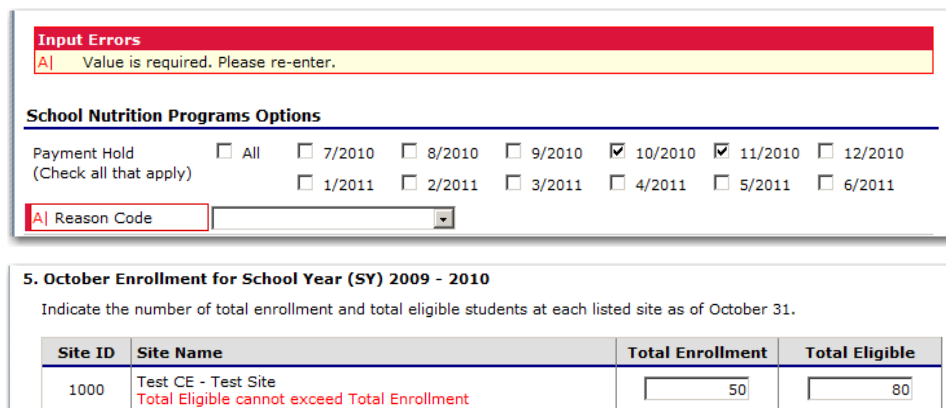

Figure 3: Programs Menu Screen

2.4 System Rules and Error Processing

All information entered and saved on the system is verified to ensure it conforms to data entry guidelines and system rules. The site performs two types of checks on information entered: Input Edits and Business Rule Edits.

2.4.1 Input Edits

Whenever information is saved or prior to proceeding to a new screen, the site checks for input errors. These errors may include entry errors, such as an invalid data entry (i.e., entering a 4-digit Zip Code), or a non-logical entry (e.g., entering a greater number of eligible than enrolled children).

If a form contains an input error and the user selects Save, the screen either displays the error code and description in red at the top of the page (and the error code is a letter) or displays a message next to the field in error. Input errors **must be corrected** before you can proceed. The system will <u>not</u> save data entered on a screen that contains an input error. The user must correct the input errors and select Save again.

Figure 4: Examples of an Input Error (Partial Screen)

2.4.2 Business Rule Edits

Business rule edits are used to ensure that entered data on a form conforms to State-defined guidelines/requirements and federal regulation. Once the user initiates a save, TX-UNPS will perform business rule edit checks after all input errors have been corrects and a confirmation screen is provided stating that data entered has been saved and identifies whether errors exist.

The user may correct business rule errors immediately or at another time. The entered data will not be lost. The errors will display at the top of the screen with an error code (usually 4-5 digits) and error description. Business rule edits do not prohibit the system from saving the data entered on the screen.

Figure 5: Examples of a Business Rule Error (Partial Screen)

In addition, business rule edits have an error severity that indicates whether an error is considered an Error or a Warning. Errors appear in red and must be corrected before the form can be submitted. Warnings appear in blue and indicate an "out of the ordinary" data value. Warning errors do not need to be corrected prior to form submission.

Figure 6: Example of a Warning Error

2.5 Selecting a Program Year

Information for Contracting Entities is displayed based on the selected program year. Upon logging in to the system, the "active" program year is the default selection and can be found in the top-right corner of the blue menu toolbar. In order view information from a prior year, you will need to change the program year.
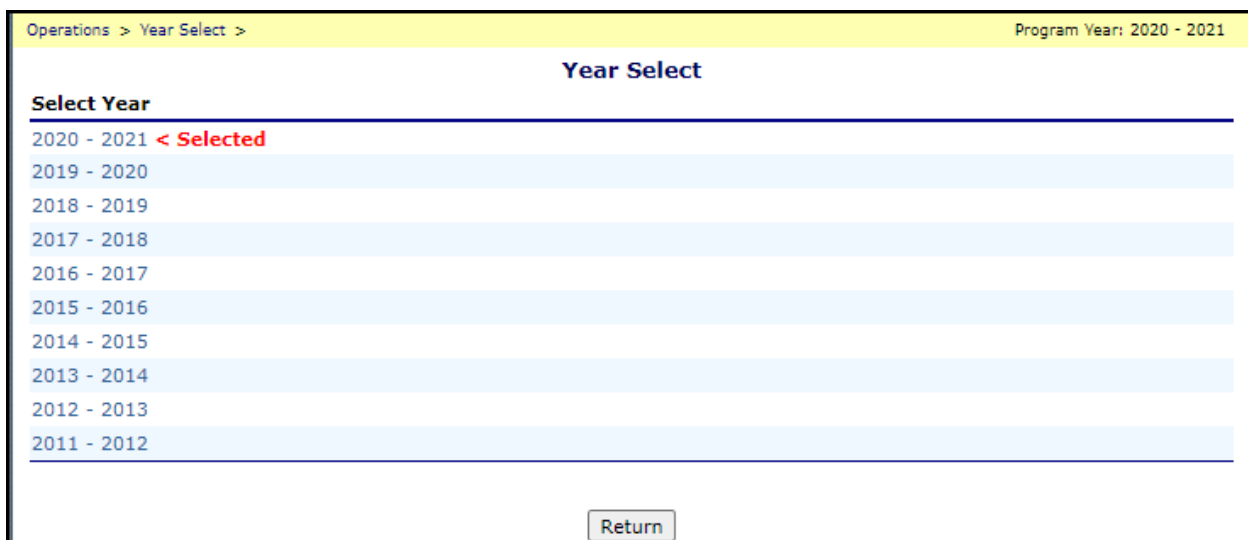
Please Note: A Contracting Entity will be unable to select and view any year, inclusive of current and past years, if they have been granted the security right to do so. Contact and request access to the Select Year security right if you think this is in error.

2.5.1 Selecting a School Year

1. Select **Year** on the blue menu toolbar at the top of the page. The **Year Select** screen displays.
2. Select the **year**. The **selected year** is indicated by **<Selected.**
3. Use the **menu** bar to return to the task in the program.

Tip: The ability to view and/or modify a Program year is controlled by the State's system administrator. It is important to note that a Program year may be set as "view only" to the Contracting Entities and "modify" to authorized State users.

Operations > Year Select >	Program Year: 2020 - 2021

Year Select

Select Year

2020 - 2021 **< Selected**
2019 - 2020
2018 - 2019
2017 - 2018
2016 - 2017
2015 - 2016
2014 - 2015
2013 - 2014
2012 - 2013
2011 - 2012

Return

Figure 7: Select Year Screen

3.0 FDP Operations

This section explores the functions within the Operations section of the Food Distribution Program (FDP). Here, users can manage everything from Contracts and Entitlement to Invoicing and FDP Maintenance.

3.1 Operations Menu

The Operations menu is the starting point for all tasks related to the FDP functions. Figure 8 displays the Operations menu items and descriptions:

Operations >	Program Year: 2020 - 2021
Item	**Description**
Contracts	Manage FDP Contracts
Entitlement	Manage FDP Entitlement
Allocations	Create and Manage Commodity Allocations
Distributions	Manage Contracting Entity Orders
Shipping	Manage Contracting Entity Shipments
Surveys	Create and Manage Commodity Surveys
Inventory	Manage Inventory
Inbound Shipments	Create and Manage Inbound Shipments
Processors	Processors Applications and Activity Reports and Maintenance
Invoicing	Process Invoices
FDP Maintenance	FDP Maintenance

Figure 8: Operations Menu Screen

3.1.1 Accessing the Operations Menu

1. On the blue menu toolbar, select **Operations** to access the menu.
2. Select an **item** to access.

3.2 Contracts

Before a Contracting Entity can participate in the FDP, an annual FDP Contract must be submitted for the contracting entity for the program and fiscal year. In addition to general information about the contract, the Annual FDP Contract contains the Contracting Entity's delivery, contact, and entitlement information. Notes specific to the contract are also stored with the Annual Contract.

Before a Contracting Entity can participate in the FDP, an Annual FDP Contract must be submitted for

the contracting entity for the program and fiscal year. In addition to general information about the contract, the Annual FDP Contract contains the Contracting Entity's delivery, contact, and entitlement information. Notes specific to the contract are also stored with the Annual Contract.

 Please Note: A CE must participate in NSLP before completing the FDP Annual Contract.

The Contracts menu allows you to access Contracts, Contracts Rollover, and update TLS functions. The following table describes the features available from the menu.

Item	Description
Contracts	• Enables user to manage all Contracting Entity contract information
Contracts Rollover	• Enables user to rollover contract data to new year
Update TLS	• Enables user to import and update contract TLS from Contracting Entity Claims

Operations > Contracts >	Program Year: 2020 - 2021

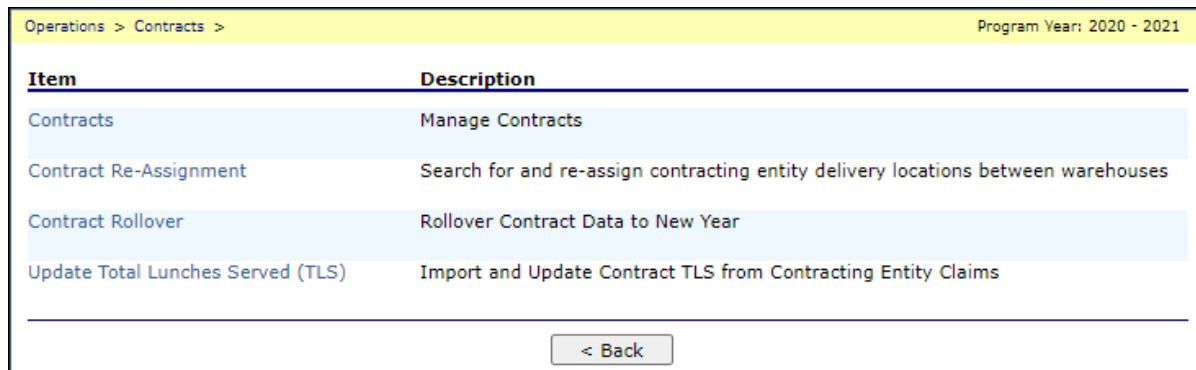| Item	Description
Contracts	Manage Contracts
Contract Re-Assignment	Search for and re-assign contracting entity delivery locations between warehouses
Contract Rollover	Rollover Contract Data to New Year
Update Total Lunches Served (TLS)	Import and Update Contract TLS from Contracting Entity Claims

< Back

Figure 9: Contracts Menu Screen

3.2.1 Accessing Contracts

1. On the blue menu toolbar, select **Operations.**
2. Select **Contracts** to access the menu.
3. Select **Contracts.** If a Contracting Entity's contract has already been selected, the Contract screen displays. If no Contracting Entity's contract has been selected, use the FDP Contracts search feature to search for and select a Contracting Entity's contract.

Figure 10: Food Distribution Program (FDP) Contracts Screen (Partial)

3.3 Food Distribution Program (FDP) Contracts Search

To view or modify contract details, you must search for and select a contract for a Contracting Entity. A search can be conducted by program year, program, Contracting Entity, CE ID, warehouse, contract status, packet status, or contract consultant. The search result displays in the Contracts list below the search criteria.

 Please Note: The warehouse search uses the warehouse specified in the delivery location(s), not the warehouse specified in the FDP contract. IF no delivery locations exist, the CE will be excluded from this type of search.

3.3.1 Searching for a Contract

1. Use any or all of the criteria below to search for a contract.
   - Select a **Program Year.**
   - Select a **Program.**
   - Select a **Contracting Entity**.
   - Select a **Warehouse.**
   - Select a **Contract Status.**
   - Select a **Packet Status.**
   - Select a **Contract Consultant.**
   - Enter a **full CE ID.**

2. Select **Display Contracts.**
3. Select the **link** for the Contracting Entity contract to access.

3.3.2 Starting a New Contract

1. Select **New Contract** from the FDP Contracts search screen. The FDP – New Contract screen displays.

Figure 11: Food Distribution Program – New Contract Screen

2. Select a **Program**.
3. Select a **Program Year.**
4. Select a **Contracting Entity.**

Please Note: State users create New Contracts. Only Contracting Entities that the State has indicated are participating in FDP in the CE Profile and do not have a contract for the program year will display in the drop-down list. If the desired Contracting Entity does not display in the list or if the drop-down list states "No Contracting Entities available", the State user will need to indicate in the Contracting Entity Profile that the Contracting Entity is eligible to participate in FDP.

5. Select **Continue >>**.

Figure 12: Food Distribution Program – New Contract Screen

6. Complete all **information** for contract.

Please Note: Setting the Contract Status to "Inactive" will exclude the contracting entity from entitlement distributions and preclude the contracting entity from ordering commodities. Setting the Contract Status to "On Hold" will preclude the contracting entity from ordering commodities for delivery.

Figure 13: Food Distribution Program – NSLP Screen (Partial)

7. Select **Continue >>.** The screen re-displays in view-only mode.
8. Review information and select **Submit Contract.**

3.4 Food Distribution Program Contract Packet

The Food Distribution Program Contract Packet is the starting point for all tasks related to the contracting entity's annual contract. This screen contains all forms for a Contracting Entity's contract packet, including: Contracting Entity Information Update/Certification, Contacts Information, Delivery Location Information, and any Notes pertaining to the packet.

A Contracting Entity information header displays in a box at the top of the screen and contains the Contracting Entity name and CE ID. In addition, it displays the Packet Status, Packet Approved Date (if applicable) and Contract Status. An Annual Contract can only be deleted if there are no orders associated with the contract (i.e., Allocations, Orders, etc.).

Figure 14: Food Distribution Program Contract Packet– FDP Screen

3.4.1 Viewing or Modifying a FDP Contract

1. Access the **Food Distribution Program Contract** screen.
2. Select **View** or **Modify** for FDP contract.
3. View or revise any **information.**
4. If viewing, select **Cancel** or if modifying, select **Continue>>.** The screen re-displays information in view-only mode.
5. Review information and select **Submit Contract** (Submit Contract is the same as "save").

3.4.2 Viewing, Modifying, or Adding Contact Information

The following section pertains to Program, Ordering, and Billing Contact information. Contact Information for each contact type must be created for each contracting entity, as this contact information will appear on various documents printed using the Reports functionality. The CE can add/modify contact information.

1. Access the **Food Distribution Program Contract screen.**
2. Select **View, Modify** or **Add** for the Food Service Director, Ordering, or Billing Contact.
3. View or revise any desired information.
4. Select the **checkbox** for the Contact Information Certification, if applicable.
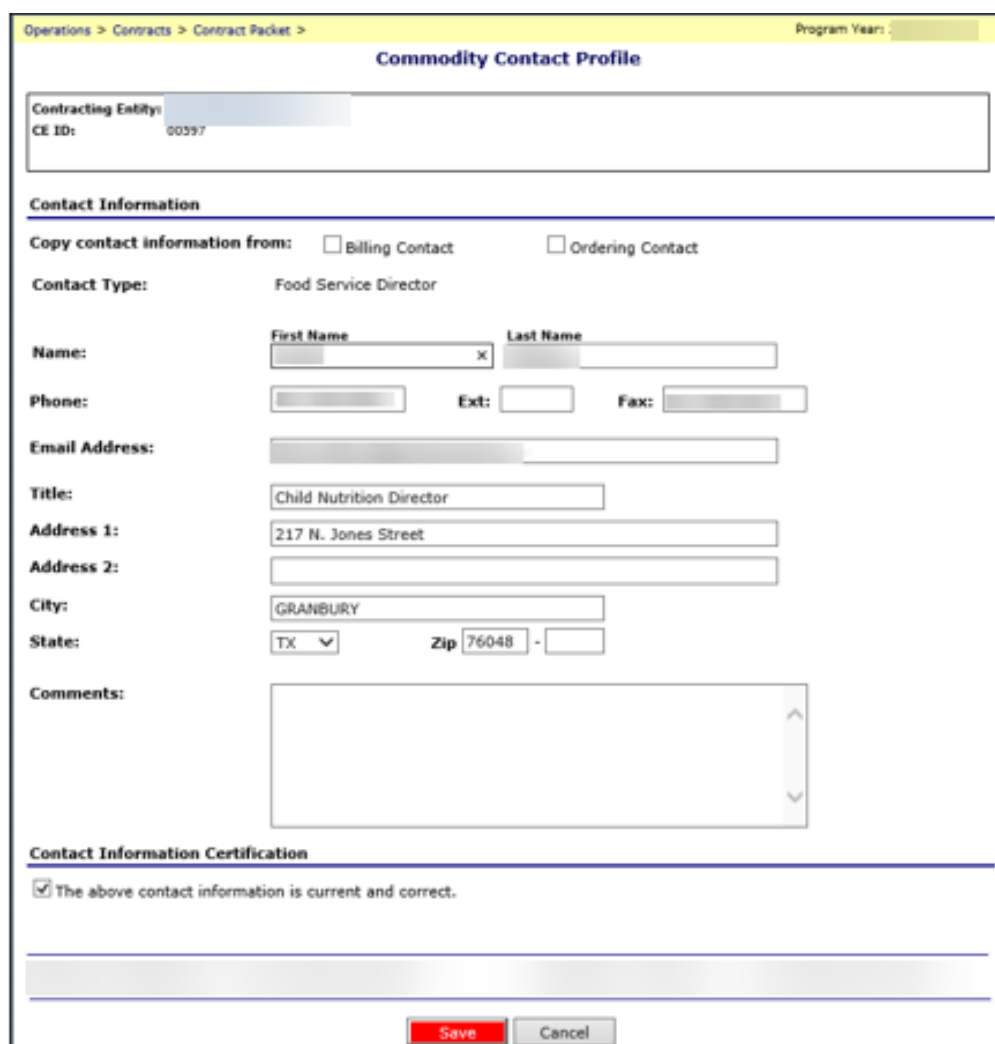5. If viewing, select **Cancel** or if modifying, select **Add.**

Figure 15: Commodity Contact Profile Screen

3.4.3 Adding a Delivery Location

Delivery Locations are where the Contracting Entity wishes to have the USDA Foods delivered. Some Contracting Entity's sites may have orders delivered directly to the site, while others might have USDA Foods delivered to another site or a common warehouse for storage until needed. All Contracting Entities must designate at least one Delivery Location. Only state users can add/modify delivery locations.

1. Access the **Food Distribution Program Contract screen**.
2. Select **Add/Remove Location.**

Add/Remove Location	Delivery Locations:
View Modify	GRANBURY ROBERSON ELEM
	Warehouse(s):
	CBBC DALLAS
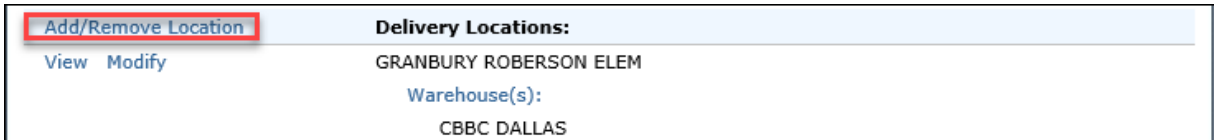
Figure 16: Add/Remove Delivery Location Selection

3. Select **Add** in the Actions column for Available Delivery Locations. The page refreshes and displays the added delivery location in the Linked Delivery Locations section.

Please Note: To search for a delivery location, a partial or full delivery location name can be entered in the Delivery Location Name textbox and select **Search.**

Selecting **View** in the Actions column displays the Delivery Location Profile in view-only mode.

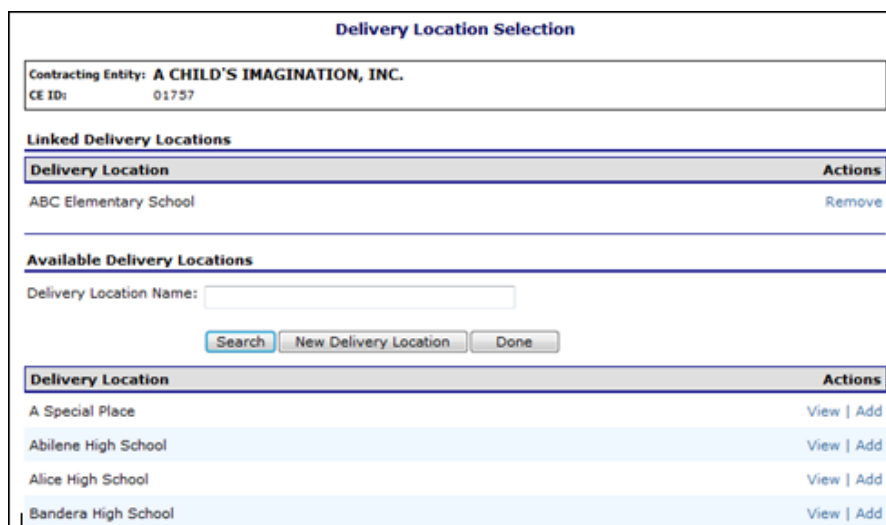4. Repeat **Step 3** until all desired Delivery Locations have been added.
5. Select **Done.**

Figure 17: Delivery Location Screen

3.4.4 Removing a Delivery Location

Once a Delivery Location is removed, it will not be linked to the Contracting Entity. The Contracting Entity will not be able to order commodities for delivery to an unlinked delivery location.

1. Access the **Food Distribution Program Contract screen.**
2. Select **Add/Remove Location** or select a **Warehouse(s)** link under Delivery Locations.
3. Select **Remove** in the Actions column for Linked Delivery Locations. The page refreshes and displays the removed delivery location in the Available Delivery Locations section.
4. Repeat **Step 3** until all applicable Delivery Locations have been removed.
5. Select **Done.**

Important   Please Note: Delivery locations are not specific to a to a program; therefore, removing a delivery location will remove it from all the CE's contracts (ex. NSLP and SFSP).

3.4.5 Creating a New Delivery Location

1. Access the **Food Distribution Program Contract screen.**
2. Select **Add/Remove Location.**
3. Select **New Delivery Location** (button) to access a new Delivery Location Profile.
4. Enter all **information.**
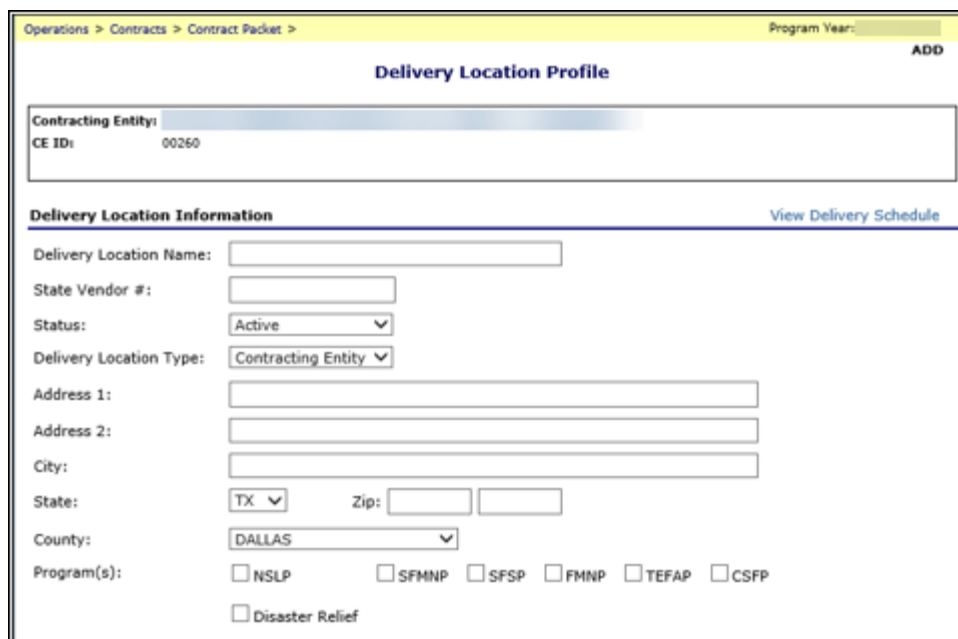5. Select **Add** to save the new delivery location.

Figure 18: Delivery Location Profile Screen (Partial)

3.4.6 Viewing or Modifying a Delivery Location Profile

1. Access the **Food Distribution Program Contract** screen.
2. Select **View** or **Modify** next to the applicable Delivery Location.
3. **View or modify** any information.

Please Note: Select the **View Delivery Schedule link** to display the delivery schedule in a new window. A date will only display in the delivery schedule calendar if a stop/route has been associated with the CE.

4. If viewing, select **<Back**. If modifying, select **Save.**

3.4.7 Viewing or Modifying Notes

1. Access the **Food Distribution Program Contract** screen.
2. Select **Modify** for Notes.

Figure 19: Contract Notes Modify Selection

3. Select the **date link** to view or modify note.

Figure 20: Contract Notes

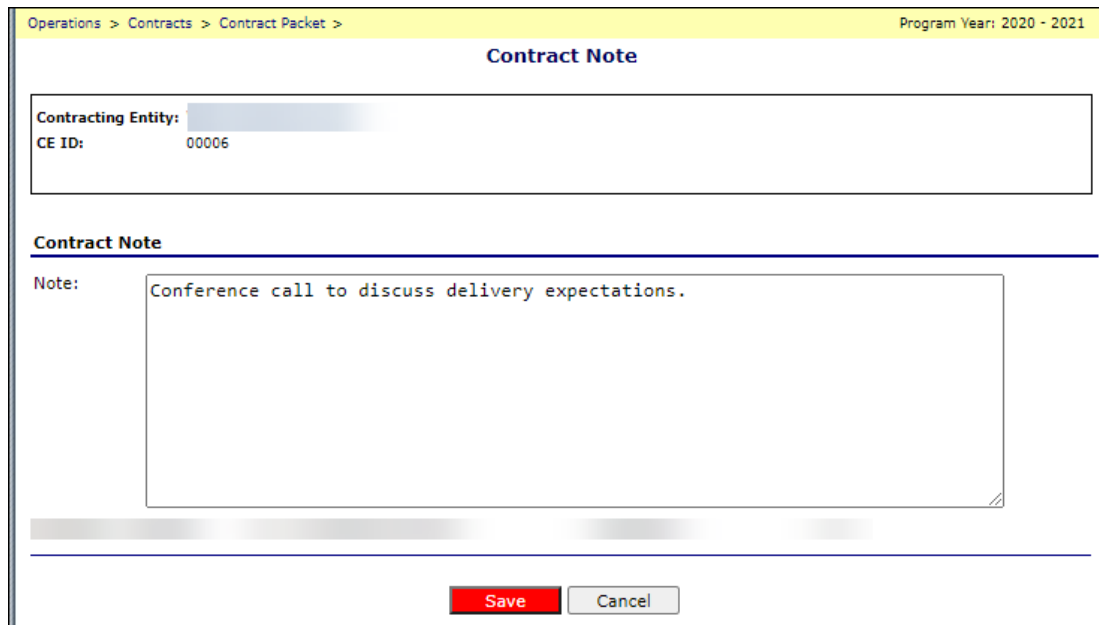4. View or modify any necessary **information**.

Figure 21: Contract Notes - View/Modify Screen

5. Select **Save.**

3.4.8 Creating a New Note

1. Access the **Food Distribution Program Contract** screen.
2. Select **View or Modify** for Notes.
3. Select **Create New Contract Note.**
4. Enter **note content.**
5. Select **Add.**

 Please Note: Contract notes do not display to the CE, only internal users.

3.4.9 Approving a Contract

1. Access the **Food Distribution Program Contract screen.**
2. Select the **Modify link** next to a FDP Contract.
3. Select **"Approve"** from the Contract Status drop-down list.

6. Select **Continue >>.**
7. Select **Submit Contract.**

3.4.10 Terminating a Contract

1. Access the **Food Distribution Program Contract screen**.
2. Select **Terminate Contract.**
3. Select the **Closed/Terminated Date.**
4. Select the **Closed/Terminated Code.**
5. Enter the **Closed/Terminated Reason.**
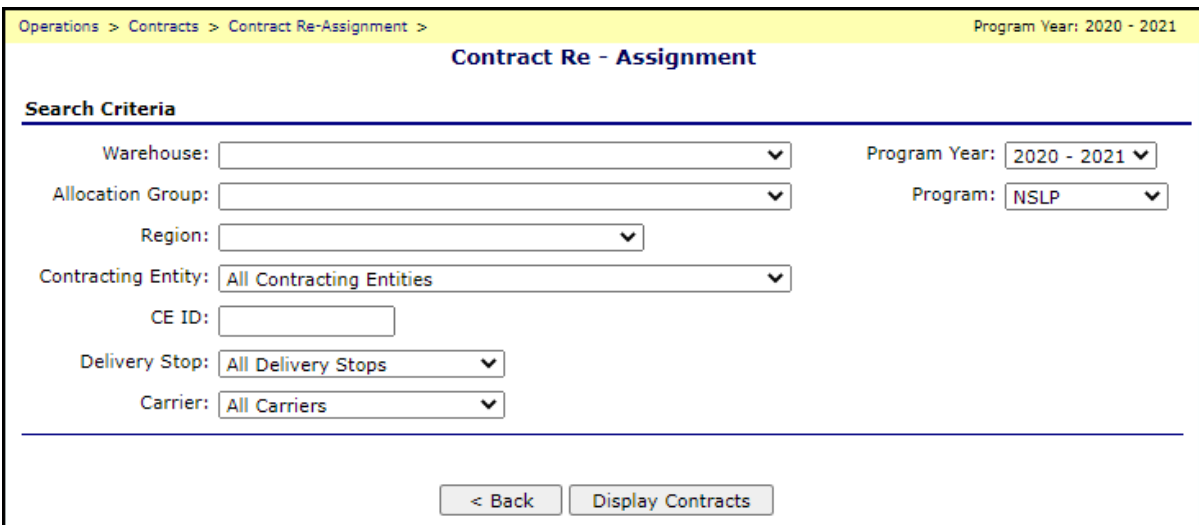6. Select **Save.**

3.4.11 Re-Opening a Contract

1. Access the **Food Distribution Program Contract screen.**
2. Select **Reopen Contract.**

3.5 Contract Re-Assignment

This feature allows for the search and re-assignment of Contracting Entities delivery locations between warehouses.

3.5.1 Search for a Contract

1. Select **Contract Re-Assignment** from the Contracts menu screen.
2. Using the drop-down boxes complete the **questions** in the Search Criteria section.
3. Select the **Display Contacts button.**

Figure 22: Contract Re-Assignment Screen

4. The Contract Re-Assignment screen displays. Using the drop-down boxes Select a new **Allocation Group** and **Region.**
5. Check all **Contracting Entities** to include into the re-assignment or select the **Check/Uncheck All button** to include all options.
6. Select the **Continue >> button.**

Program Year: 2020 - 2021

Contract Re-Assignment

Program Year: 2020 - 2021
Program: NSLP

Re-Assignment Information

	From	To
Allocation Group:	All Groups	No Change
Region:	All Regions	No Change
Warehouse:	US FOODS INC	No Change
Delivery Stop:	All Stops	No Change
Carrier:	All Carriers	No Change

Contracts   Count: 216

☐ Check / Uncheck all

Select	CE ID	Contracting Entity	Allocation Group	Region
☐	00452		US Food Service	Region 6
☐	01034		US Food Service	Region 6
☐	00880		US Food Service	Region 6
☐	00918		US Food Service	Region 6
☐	00710		US Food Service	Region 6
☐	00008		US Food Service	Region 6
☐	00672		US Food Service	Region 6
☐	00591		US Food Service	Region 6
☐	00017		US Food Service	Region 6
☐	01005		US Food Service	Region 6
☐	00148		US Food Service	Region 6
☐	00946		US Food Service	Region 6

< Back   Continue >>

Figure 23: Contract Re-Assignment Screen

7. The selections will display with the new assignment schedule. If contract assignments are already set for the current year. Changes will take place the following year.
8. Select **Continue >>.**

Figure 24: Revised Contract Re-Assignment Screen

9. Select the **Re-Assign Contracts button** to complete the activity and receive a confirmation.

Figure 25: Contract Re-Assignment Selection Screen

3.6 Contract Rollover

The Contract Rollover function enables the user to easily and automatically rollover contract data to a new year. Using this function, data does not have to be manually re-entered for an entire contract.

Please Note: This function can only be performed once for each program and year. FDP Contracts with a status of "Inactive" are excluded from the rollover.

3.6.1 Rollover Contract Data

1. Select **Operations** in the menu bar.
2. Select **Contracts.**
3. Select **Contract Rollover.**
4. Select the **Program.**
5. Select the **year** to copy data *from* the "Copy Data from Program Year" drop-down list.
6. Select the **year** to copy data *to* in the "To Program Year" drop-down list.
7. Select **Rollover Contracts.**

Operations > Contracts > Contract Rollover >   Program Year: 2020 - 2021

Contract Rollover

Contract Rollover Criteria

Program:	⌄
Copy Data From Program Year:	⌄
To Program Year:	⌄

<center>Rollover Contracts   Cancel</center>

Figure 26: Contract Rollover Screen

3.7 Updating TLS

This feature enables contract TLS to be imported and updated from Contracting Entity Claims.

3.7.1 Updating Total Lunches Serves (TLS)

1. Select **Operations** in the menu toolbar.
2. Select **Contracts.**
3. Select **Update Total Lunches Served (TLS).**

Figure 27: Update TLS Screen

4. Select a **Contract Program Year** in the drop-down list.
5. Select a **Contract Program** in the drop-down list.
6. Select the **month** and **year time-range** from the drop-down lists.
7. Select **Continue >>**.
8. If any Contracting Entities require TLS to be updated manually, enter new **TLS** in the textbox(es).

Figure 28: Update Contract TLS screen (Partial)

9. Select **Continue >>**.
10. Select **Post Updates.**
11. Select **'OK'** in the pop-up confirmation.

3.8 Entitlement

Entitlement represents the value of USDA Foods a CE is entitled to receive for the applicable program year. The Entitlement tracking feature allows States to allocate their entitlement to participating Contracting Entities based on the total lunches served by each CE. The following table describes the features available from the Entitlement menu.
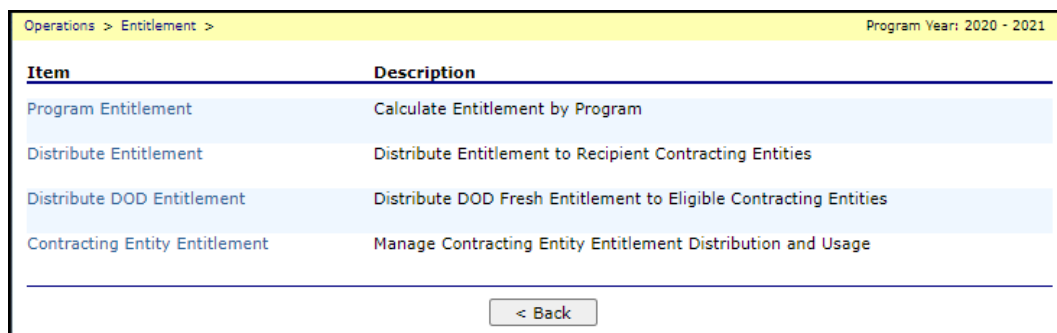
Item	Description
Program Entitlement	• Enables user to calculate the state's entitlement by program
Distribute Entitlement	• Enables user to distribute entitlement to Contracting Entities
Distribute DOD Entitlement	• Enables user to distribute DOD entitlement to participating Contracting Entities
Contracting Entity Entitlement	• Enables user to manage Contracting Entity entitlement distribution and usage

3.8.1 Accessing Entitlement

1. On the blue menu toolbar, select **Operations.**
2. Select **Entitlement** to access the menu.

3.8.2 Program Entitlement

The Program Entitlement function enables viewing and calculating of entitlement values for an entire program. The Program Entitlement screen displays Current Year, Rollover, Total, Distributed, Remaining, and Minimum Entitlement Values for each FDP program.

Operations > Entitlement >	Program Year: 2020 - 2021
Item	**Description**
Program Entitlement	Calculate Entitlement by Program
Distribute Entitlement	Distribute Entitlement to Recipient Contracting Entities
Distribute DOD Entitlement	Distribute DOD Fresh Entitlement to Eligible Contracting Entities
Contracting Entity Entitlement	Manage Contracting Entity Entitlement Distribution and Usage

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Figure 29: Entitlement Menu Screen

3.8.3 Calculating New Program Entitlement

1. Select **Program Entitlement** from the menu.
2. Select the **program** for which to calculate new entitlements.

Figure 30: Program Entitlement Screen

3. Select **Calculate New Entitlement**.

Figure 31: Calculate New Program Entitlement Screen

4. In Program Entitlement, enter the **new Per Meal Rate value**, if applicable.
5. In the Program Entitlement section, enter **New Current Year Entitlement**, if applicable.
6. In the Program Entitlement section, enter new **Rollover Entitlement**, if applicable.
7. Enter new **Minimum Entitlement**, if applicable.
8. Select **Update Program Entitlement.**
9. Click **Finish.**

Figure 32: Calculate New Program Entitlement Screen

3.8.4 Viewing Program Entitlement

1. Select **Program Entitlement** from Entitlement menu.
2. Select a **program** to view the entitlement.
3. Select any **link** under Current Year Entitlement, the program screen displays the current entitlement values.

3.9 Distribute Entitlement

The Distribute Entitlement function enables you to distribute entitlement or post and entitlement distribution to Contracting Entities participating in the FDP. The Distribute Entitlement screen displays Total Program Entitlement Current Distribution, and Remaining Distribution values for each program.

The distribute entitlement process consists of two steps:

1. Distributing an amount from the program entitlement. The system automatically calculates the fair share entitlement distribution for each Contracting Entity in the program.

2. Reviewing and posting the distribution. The System allows the user to review the fair share calculation results and provides the option to delete the calculated distribution or post the distribution. Posting the distribution makes the entitlement available to the Contracting Entities.

Entitlement Distribution

Program	Total Program Entitlement	Current Distribution	Remaining Entitlement	Actions
NSLP	$188,294,815	$20,100	$188,274,715	Distribute Entitlement | Post Distribution
SFMNP	$0	$0	$0	Distribute Entitlement | Post Distribution
SFSP	$0	$0	$0	Distribute Entitlement | Post Distribution
FMNP	$0	$0	$0	Distribute Entitlement | Post Distribution
TEFAP	$22,017,108	$22,017,108	$0	Distribute Entitlement | Post Distribution
CSFP	$3,308,064	$3,308,064	$0	Distribute Entitlement | Post Distribution
Disaster Relief	$0	$0	$0	Distribute Entitlement | Post Distribution
Totals	**$213,619,987**	**$25,345,272**	**$188,274,715**	

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Figure 31: Entitlement Distribution Screen

3.9.1 Distributing Program Entitlement

1. Select **Distribute Entitlement** from the Entitlement menu.
2. Select **Distribute Entitlement** in the Action column for a program.

Distribute Program Entitlement - NSLP

Program Entitlement	Current Distributed Entitlement	Remaining Entitlement
$190,209,097.82	$190,209,097.82	$0.00

Program Entitlement

Minimum Distribution:	$0.00
Maximum Distribution:	$190,209,097.82
Current Distributed Entitlement:	$190,209,097.82
New Distribution:	[ ]
Difference:	($190,209,097.82)

Calculate Distribution   Cancel

Figure 34: Distribute Program Entitlement Screen

3. Enter the **New Distribution amount**. The system automatically calculates the Difference amount.

---

4. Select **Calculate Distribution.** If continuing to post distribution, begin at **Step 3** below.

3.9.2 Posting a New Distribution

1. Select **Distribute Entitlement** from the Entitlement menu.
2. Select **Post Distribution** in the Action column for a program.

Entitlement Distribution Results - NSLP

Current Distribution $186,002,615.98				New Distribution $180,000,000.00			

CE ID	Contracting Entity	TLS	Status	CIL	a Current Entitlement	b New Entitlement	c Used Entitlement	(b-c) Remaining Entitlement
00260	A PLUS CHARTER SCHOOLS, Inc. DBA A + ACADEMY	163,776	Approved	N	$55,249.94	$53,266.37	$43,174.66	$10,091.71
00261	A PLUS CHARTER SCHOOLS, INC. DBA INSPIRED VISION ACADEMY	170,628	Approved	N	$57,561.47	$55,494.90	$48,727.68	$6,767.22
00255	A.W. BROWN-FELLOWSHIP	232,597	Approved	N	$78,466.75	$75,649.65	$70,260.46	$5,389.19
00579	ABBOTT ISD	17,097	Approved	N	$5,767.68	$5,560.61	$6,314.00	($753.39)

Figure 35: Distribute Program Entitlement Screen

3. Review **fair share distribution amounts.**
4. Select **Post New Distribution.**
5. Select **Finish.**

Please Note: Entitlement is distributed to the Contracting Entities until the calculated distribution has been posted. An Excel file containing the fair share values and calculations for all Contracting Entities may be generated for review prior to posting the distribution by selecting **Generate Excel File.**

3.9.3 Deleting a Distribution

1. Select **Distribute Entitlement** from the Entitlement menu.
2. Select **Post Distribution** in the Action column for a program.
3. Select **Delete.**

Please Note: Deleting a distribution will delete the unposted distribution. To recalculate and distribute entitlement after deleting, you must follow the steps under To Distribute Program Entitlement. This is not an option if the distribution has been posted.

3.10 Distribute DOD Entitlement

The Distribute DOD Entitlement function enables you to distribute entitlement or post an entitlement distribution to Contracting Entities participating in the FDP. The Distribute Entitlement screen displays Current Distribution and Actions values for each program.

The distribute entitlement process consists of two steps:

- Distributing an amount from program entitlement. The system automatically calculates the fair share entitlement distribution for each Contracting Entity in the program.
- Reviewing and posting the distribution. The system allows the user to review the fair share calculation results and provides the option to delete the calculated distribution, if necessary, or post the distribution. Posting the distribution makes the entitlement available to the Contracting Entities.

Figure 36: Entitlement Distribution Screen

3.10.1 Distributing Program Entitlement

1. Select **Distribute DOD Entitlement** from the Entitlement menu.
2. Select **Distribute Entitlement** in the Action column for a program.

Figure 37: Distribute Program Entitlement Screen

3. Enter the **State DOD Commitment.** The system automatically calculates the DOD Fresh Distribution by subtracting the Farm to School used amount.
4. Modify the **Calculated DOD Fresh Distribution** amount, if necessary.

Please Note: The DOD Fresh Distribution cannot be less than the Farm to School Used amount and cannot be less than the Minimum Distribution multiplied by the number of eligible Contracting Entities.

5. Enter the **Minimum Distribution per Eligible Contracting Entity.**
6. Select **Calculate Distribution** to obtain a confirmation.
7. Select **Continue >>.** If continuing to post distribution, begin at **Step 3** below.

3.10.2 Posting a New Distribution

1. If necessary, select **Distribute Entitlement** from the Entitlement menu.
2. Select **Post Distribution** in the Action column for a program.

DOD Entitlement Distribution Detail - NSLP

Contracting Entities shown in GRAY are no longer participating in the DOD Fresh Program.

Participating Contracting Entities highlighted in **RED** below did not have sufficient remaining entitlement to receive the Minimum Distribution.

State Total DOD	Total FTS Used	Total DOD Fresh Distribution
$11,359,384.75	$971,537.50	$10,387,847.25

● Display DOD Fresh Distribution ○ Display Actuals

Contracting Entity ID	Contracting Entity	TLS	FTS Used	DOD Fresh Distribution	Total DOD
00255	A.W. BROWN-FELLOWSHIP	219,280	$2,000.00	$7,502.45	$9,502.45
479	ACADEMY OF ACCELERATED LEARNING INC	541	$0.00	$50.00	$50.00
935	AUSTWELL-TIVOLI ISD	10,000	$0.00	$0.00	$0.00
638	GANADO ISD	10,000	$0.00	$50.00	$50.00
255	A.W. BROWN-FELLOWSHIP	10,000	$201,957.34	$9,923.09	$211,880.43
579	ABBOTT ISD	10,000	$0.00	$9,923.09	$9,923.09
452	ABERNATHY ISD	10,000	$0.00	$9,923.09	$9,923.09
1034	ABILENE ISD	10,000	$0.00	$9,923.09	$9,923.09
880	ADRIAN ISD	10,000	$0.00	$9,923.09	$9,923.09
901	ALEDO ISD	10,000	$0.00	$9,923.09	$9,923.09
125	ALPINE ISD	20,000	$0.00	$19,796.14	$19,796.14
8	ANDREWS ISD	10,000	$0.00	$9,923.09	$9,923.09
	Total	13,401,581	$201,957.34	$298,042.66	$500,000.00

Post Distribution   Delete   Cancel

Generate Excel File

Figure 38: Distribute Program Entitlement Screen

3. Review **fair share distribution amounts.**
4. Select **Post New Distribution.**
5. Click **Finish.**

Please Note: Entitlement is distributed to the Contracting Entities until the calculated distribution has been posted. An Excel file containing the fair share values and calculations for all Contracting Entities may be generated for review prior to posting the distribution by selecting Generate Excel File.

3.10.3 Deleting a Distribution

1. If necessary, select **Distribute DOD Entitlement** from the Entitlement menu.
2. Select **Post Distribution** in the Action column for a program.
3. Select **Delete.**

Please Note: Deleting a distribution will delete the unposted distribution. To recalculate and distribute entitlement after deleting, the steps under the section **To Distribute Program Entitlement** must be followed.

3.11 Contracting Entity Entitlement

The Contracting Entity Entitlement function enables Contracting Entity entitlement distributions and usage viewing and management. The Contracting Entity Search section of the Contracting Entity Entitlement screen allows the user to filter the list of Contracting Entities to be posted.

Contracting Entity Entitlement

Contracting Entity Search

Program Year:	2017 - 2018
Program:	NSLP
Contracting Entity:	All Contracting Entities
CE ID:	
Allocation Group:	All

< Back   Search

Figure 39: Contracting Entity Entitlement (Search) Screen

3.11.1 Searching for a Contracting Entity

1. Select **Contracting Entity Entitlement** from the Entitlement menu.
2. Use the **search criteria** to select/search for a Contracting Entity.

Please Note: A search can be conducted by program year, program, contracting entity, CE ID, and/or allocation group. Multiple criteria and partial values may be used.

If a Contracting Entity has already been selected during a session, it will be the default choice in the Contracting Entity drop-down.

3. Select **Search.** A list of all applicable Contracting Entities displays. Total distribution and entitlement amounts display above the Contracting Entity list.

Figure 40: Entitlement Distribution Detail Screen

3.11.2 Viewing Contracting Entity Entitlement Distribution Detail

1. Select **Contracting Entity Entitlement** from the Entitlement menu.
2. Use the **search criteria** to select/search for a Contracting Entity.
3. Select the **link** in the Contracting Entity column. The Contracting Entity Entitlement Distribution Detail screen displays.

3.11.3 Viewing Contracting Entity Entitlement Distribution History
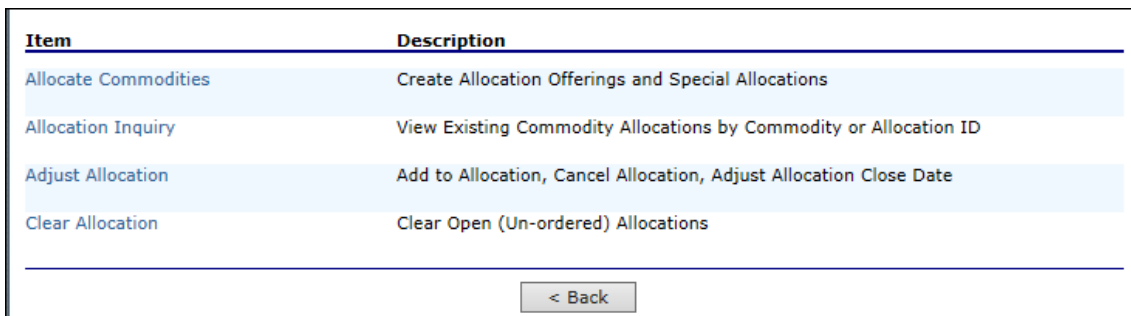
1. Select **Contracting Entity Entitlement** from the Entitlement menu.
2. Use the search criteria to select/search for a **Contracting Entity.**

3. Select the **link** in the Entitlement Distribution column. The Contracting Entity Distribution History screen displays.

Figure 41: Entitlement Distribution History Screen

3.11.4 Viewing a Contracting Entity Entitlement Usage

1. Select **Contracting Entity Entitlement** from the Entitlement menu.
2. Use the **search criteria** to select/search for a Contracting Entity.
3. Select the **link** in the Entitlement Used column.

Figure 42: Entitlement Usage Screen

4. Select the **link** in the Description column. The Commodity Allocation Report screen displays.

Commodity Allocation Report

CE ID: 00359	Allocation Name: Srvy2250
Contracting Entity: HUCKABAY ISD	Program: NSLP
	Year: 2018

Allocation Date: 01/30/2017   Close Date:

Entitlement Commodities

Item Number	Description	Pack Size	Processing Fee	Alloc Qty	Unit Value	Total Value
100012	CHEESE CHED RDU FAT YEL SHRD-6/5 LB	6/5 LB BAGS	$0.00	2	$60.21	$120.42
100017	CHEESE AMERICAN LVS-6/5 LB	6/5 LB LOAVES	$0.00	2	$58.86	$117.72
110396	CHEESE STICKS STRING MOZZ 1oz/360	360/1oz sticks	$0.00	2	$51.39	$102.78
			Total Assistance:	**6**		**$340.92**

Created By: AHODAPP   On: Jan 30 2017 9:23PM

< Back

Figure 23: Commodity Allocation Report Screen

Please Note: The value of processed end products is not deducted during the allocation process. The value is deducted upon entering and saving an amount in the Processing Reserved field in the CE information update screen.

3.11.5 Adjusting a Contracting Entity's Entitlement Distribution

1. Select **Contracting Entity Entitlement** from the Entitlement menu.
2. Use the search criteria to select/search for a **Contracting Entity.**
3. Select the **link** in the Entitlement Distribution column. The Entitlement Distribution History screen displays.
4. Select **New Manual Adjustment**.
5. Enter an **Adjustment Amount.**

Please Note: Credits to Entitlement Used are entered as a negative number.

6. Enter the **Adjustment Reason.**

7. Select **Submit.**

8. Click **Finish.**

Figure 44: Entitlement Distribution Adjustment Screen

3.11.6 Adjusting a Contracting Entity's Entitlement Used

1. Select **Contracting Entity Entitlement** from the Entitlement menu.

2. Use the **search criteria** to select/search for a Contracting Entity.

3. Select the l**ink** in the Entitlement Used column. The Entitlement Usage screen displays.

4. Select **New Manual Adjustment.**

5. Enter an **Adjustment Amount.**

6. Enter the **Adjustment Reason.**

7. Select **Submit.**

3.11.7 Viewing a Manual Adjustment

1. Select **Contracting Entity Entitlement** from the Entitlement menu.

2. Use the **search criteria** to select/search for a Contracting Entity.

4. Select the **link** in the Entitlement Distribution or Entitlement Used column.

5. Select the **link** for the Manual Adjustment. The Entitlement Distribution Adjustment or Entitlement Usage Adjustment screen displays.

3.12 Allocations

The allocation process is one of the mechanisms used to allocate new commodity inventory to eligible contracting entities. When commodities are received into inventory, they are placed in 'unallocated' inventory. From this stage, they are allocated to contracting entities. Once allocated, the inventory is considered reserved for those Contracting Entities and made available for them to order. The State, at its discretion, may 'clear' or 'cancel' any un-ordered allocations of commodities at any time.

The Allocations menu allows you to access allocate, view, and manage commodity allocations. The following table describes the features available from the Allocations menu.

Item	Description
Allocate Commodities	• Enables the user to create allocation offerings and special allocations
Allocation Inquiry	• Enables the user to view existing commodity allocations
Adjust Allocation	• Enables the user to adjust an allocation close date, add to, or cancel an allocation
Clear Allocation	• Enables the users to clear un-ordered allocations

Item	Description
Allocate Commodities	Create Allocation Offerings and Special Allocations
Allocation Inquiry	View Existing Commodity Allocations by Commodity or Allocation ID
Adjust Allocation	Add to Allocation, Cancel Allocation, Adjust Allocation Close Date
Clear Allocation	Clear Open (Un-ordered) Allocations

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Figure 45: Allocation Menu Screen

3.12.1 Accessing Allocations

1. On the blue menu toolbar, select **Operations.**
2. Select **Allocations** to access the menu.

3.13 Allocations Commodities

There are two types of allocations that can be created in the Allocate Commodities function.

Allocation Offerings

The Allocation Offerings feature provides the State with the option to create an Allocation Offer in which selected commodities can be allocated to all agencies in a warehouse on a 'fair share' basis or to create an Annual Survey Fill allocation, also known as a 'Weekly Allocation', by which all available inventory in a warehouse is allocated to fill requests submitted by CEs under an Annual Survey.

To create an Allocation Offering, the user would elect NOT to Use Annual Survey as the basis for the allocation. The user would allocate a specified amount of one or more commodities which would then be allocated on a 'fair share' basis based on each contracting entity's percentage of total TLS. Each contracting entity is allocated at least one case of each of the commodities being offered unless their remaining entitlement cannot afford such. When allocating a commodity, there must be enough on hand inventory to allocate one to each eligible contracting entity participating in the allocation. Once each contracting entity has been allocated one case of each commodity (and entitlement charged for the cost), they are allocated each commodity one at a time until they have reached their fair share of each commodity, or until they have no remaining entitlement. Only Contracting Entities assigned to the warehouse from which the commodities are being allocated and those meeting the Allocation Criteria will be included in the allocation.

To create a 'Weekly Allocation', the user would elect to Use Annual Survey when entering the Allocation Criteria and the selection of commodities to allocate required for an Allocation Offering would be skipped. All Unallocated and Surplus inventory available in the warehouse would be allocated to only those contracting entities having requested the items in their Annual Surveys. The inventory is allocated on a prorated basis after having first allocated at least one case to each CE requesting the commodity. If the cost of a commodity has increased since the time it was requested under the survey, additional entitlement will be drawn down from the CE to cover the difference in cost. If a CE does not have sufficient remaining entitlement to cover the difference in cost, the CE will only be allocated as much as they can afford.

Like entitlement distributions, the calculated allocations are processed and not made available to the contracting entities until they have been reviewed and posted. If necessary, an unposted allocation may be deleted.

Special Allocations

Special Allocations are allocations of a specified number of units of a commodity or commodities to a specified Contracting Entity or Contracting Entities. Like allocation offerings, only 'unallocated' or 'surplus' inventory may be allocated and Contracting Entity entitlement is drawn down based on the value of the commodities allocated.

Figure 46: Allocate Commodities Screen

3.13.1 Creating a New Allocation Offering – Use Annual Survey = No

1. Select **Allocations** from the Operations menu.
2. Select **Allocate Commodities.**
3. Select **New Allocation Offering**.

Figure 47: Allocation Offer – Criteria screen

4. Enter all **information** for the **Allocation Information.**

Please Note: The Close Date is the date after which the allocation may be cleared. The Last Refusal Date is the date by which a Contracting Entity is allowed to refuse all or part of the allocation.

5. Enter all **information** for the Allocation Criteria section. If "Use Annual Survey" is selected, Contracting Entities having completed an Annual Survey will be excluded from allocations of commodities they did not indicate they would want in the survey.

6. Select **Continue >>**.

Allocation Offer - Commodities

Allocation Information

| Allocation Name: | Offer 2 | Program Year: | 2011 - 2012 |
| Warehouse: | State Distribution Center | Program(s): | NSLP |

Continue >>   Cancel

Commodity Allocations

| | | | | | Unallocated | | Surplus | |
Item Number	Description	Program	Type	Charge Ent	Available	Allocate	Available	Allocate
100258	Apple Sliced Frz - 30 lb ctn	NSLP	E	Yes ▼	8,921	130	0	0
100359	Beans, Black Turtle #10 - 6/#10 can	NSLP	E	Yes ▼	8,918	0	9,600	0
100362	Beans, Refried, Canned - 6/#10	NSLP	E	Yes ▼	937	0	0	0
100364	Beans, Vegetarian - 6/#10	NSLP	E	Yes ▼	3,523	210	0	0
P120	Beef Crumbles Cooked - 30 lb ctn	NSLP	E	Yes ▼	1,000	0	0	0
100010	Cheese Barrel 500 - 500 brl	NSLP	E	Yes ▼	1,050	0	0	0
100047	Eggs Whole Bulk for Diversion - BULK	NSLP	E	Yes ▼	9,880	0	0	0
MMAYZ99	MAMA SELITA'S RED GOLD JALAPENO KET - 3/5 lb	NSLP	E	Yes ▼	305	0	0	0
REDY572	RED GOLD KETCHUP FANCY 6/114 oz. Po - 3/5 lb	NSLP	E	Yes ▼	400	0	0	0
REDY59P	RED GOLD KETCHUP FANCY 6/114 oz. RE - 3/5 lb	NSLP	E	Yes ▼	300	0	0	0
REDYS3G	RED GOLD Natural Ketchup made w/ Su - 3/5 lb	NSLP	E	Yes ▼	130	0	0	0

Continue >>   Cancel

Figure 48: Allocation Offer – Criteria Screen

7. For each commodity, select **Yes** or **No** in the Charge Entitlement column.

8. Enter the **quantity** to Allocate from Unallocated and/or Surplus inventory.

9. Select **Continue >>.**

10. Select **Calculate Allocations.**

11. Select **Finished**.

Figure 49: Allocation Offer – Criteria Screen

3.13.2 Viewing an Unposted Allocation by Contracting Entity

1. Select **Allocations** from the Operations menu.
2. Select **Allocate Commodities.**
3. Select the applicable **link** in the Allocation Name column.

Figure 50: Post Allocation - NSLP Screen

4. Select **View Results by Contracting Entity.**
5. Select the **link** for the applicable Recipient Contracting Entity to view allocation detail.

Figure 51: Allocation Results – Contracting Entity Detail - NSLP Screen

3.13.3 Viewing an Unposted Allocation by Commodity

1. Select **Allocations** from the Operations menu.
2. Select **Allocate Commodities.**
3. Select the applicable **link** in the Allocation Name column.
4. Select **View Results by Commodity.**

Figure 52: Allocation Results – Commodity Summary Screen

5. Select the **link** for a Commodity Description to view the Commodity Detail.

Figure 53: Allocation Results – Commodity Detail - NSLP Screen

3.13.4 Posting an Allocation

1. Select **Allocations** from the **Operations menu.**
2. Select **Allocate Commodities.**
3. Select the applicable **link** in the **Allocation Name column.**
4. Click **Post Allocation.**

3.13.5 Deleting an Allocation

1. Select **Allocations** from the **Operations menu.**
2. Select **Allocate Commodities.**
3. Select the applicable **link** in the **Allocation Name column.**
4. Click **Delete Allocation.**

3.13.6 Creating a Weekly Annual Survey Allocation Offering – Annual Survey = Yes

1. Select **Allocations** from the **Operations menu.**
2. Select **Allocate Commodities.**
3. Select **New Allocation Offering.**
4. Enter all **information** for the **Allocation Information.**

Figure 54: Allocation Offer – Criteria Screen

Please Note: The Close Date is the date after which the allocation may be cleared.

5. Select **Yes** for "Use Annual Survey."
6. Enter all remaining information for the **Allocation Criteria section.** Contracting Entities that have completed an Annual Survey will be excluded from allocations of commodities they did not indicate they would want in the survey.
7. Select **Continue >>**.
8. Select **Calculate Allocations.**
9. Select **Finished**.

3.13.7 Creating a Special Allocation

1. Select **Allocations** from the Operations menu.
2. Select **Allocate Commodities**.
3. Select New **Special Allocation**.

Figure 55: Special Allocation Screen

4. Enter all **information** for the Allocation Information.
5. Enter all **information** for the Commodity Allocations section.

Please Note: Select Add Rows to add five additional rows for commodity allocations.

6. Select **Continue >>**.
7. Select **Post Allocation.**

Figure 56: Special Allocation (Post) Screen

3.14 Allocations Inquiry

The Allocation Inquiry function allows state users to view allocations made to a specified Program for a specified Program Year. Search Criteria is entered to filter the list of allocations. Open Allocations are allocations containing commodities that have not yet been ordered by the Contracting Entity.

3.14.1 Viewing an Allocation

1. Select **Allocations** from the **Operations menu.**
2. Select **Allocation Inquiry.**

Figure 57: Allocation Inquiry Screen

3. Enter all applicable **search criteria.**

Please Note: Multiple criteria and partial values may be used. A search can be conducted by program year, program, allocation type, and allocation date range. The user may also choose to include only open allocations and to display results by allocation name or by commodity.

4. Select **Display Allocations.**
5. Select a **Contracting Entity** to display the Allocation Detail screen.

Figure 58: Allocation Inquiry - Allocations Screen

3.15 Adjust Allocation

The Adjust Allocation screen enables the State to search for an allocation to adjust. The user can add commodities to an allocation, cancel an allocation, or adjust the allocation close date.

3.15.1 Adding Commodities to an Allocation

1. Select **Allocations** from the Entitlement menu.
2. Select **Adjust Allocation.**

Figure 59: Adjust Allocation Screen

3. Select **Add to Allocation** from the Adjustment Type drop-down.
4. Enter **search criteria** into the respective fields.

Please Note: An allocation name, item number or CE ID is required.

5. Select **Display Allocations.**
6. Select a **radio button** for Units to Add.
7. If "Add the amounts entered in the list below" is selected, enter the **Units** to be added in the respective textboxes for each applicable Contracting Entity.
8. If "Add the following units to all allocations" is selected, enter the **units** to be added in the Add Units textbox. Select **Apply** to add these units for ALL Contracting Entities.
9. Enter any **comments.**
10. Select **Save and Continue.**
11. Review information entered and select **Save.**

ADD

Add to Allocation

Allocation Information

Program:	NSLP	Program Year:	2017 - 2018	Allocation Name:	All
Item Number:	All	Group:	US Food Service	CE ID:	All
Warehouse:	All			Contracting Entity:	All

Units to Add: ◉ Add the amounts entered in the list below to each allocation

○ Add the following units to all allocations:

Add Units: [ ] [Apply]

Comments: [ ]

[Next Page] [Previous Page] [Save and Continue] [Save] [Cancel]

Allocations   Showing Allocations 1 through 60 of 60

Allocation	Commodity	Type	Group	Program	Year	Close Date
CE ID	Contracting Entity					Qty Available
DOD180001			US Food Service	NSLP	2018	02/08/2017
00029	MULESHOE ISD					0
					Add Units:	[ ]
DOD180001			US Food Service	NSLP	2018	02/08/2017
00036	SEYMOUR ISD					0
					Add Units:	[ ]

Figure 60: Add to Allocation Screen (Partial)

3.15.2 Cancelling an Allocation

1. Select **Allocations** from Entitlement menu.
2. Select **Adjust Allocation.**
3. Select **Cancel Allocation** from the Adjustment Type drop-down.
4. Enter **search criteria** into the respective fields.
5. Select **Display Allocations.**
6. Select a **radio button** for Units to Cancel.
7. If "Cancel the amounts entered in the list below" is selected, enter the applicable **Units** to be canceled in the respective textboxes.
   a) Select **Yes** or **No** to Adjust Entitlement for each applicable allocation.

8. If "Cancel the following units from all allocations" is selected, enter the **Units** to cancel in the textbox. Select **Apply**.
   a. Enter any comments.
9. Select **Save and Continue.**
10. Review information entered and select **Save.**

Figure 61: Cancel Allocation Screen (Partial)

3.15.3 Adjusting Allocation Close Date

1. Select **Allocations** from the Entitlement menu.
2. Select **Adjust Allocation.**
3. From the Adjustment Type drop-down**,** choose **Adjust Close Date.**
4. Enter **search criteria** into the respective fields.
5. Select **Display Allocations.**
6. In the Dates to Adjust section, select the applicable **radio button.**
7. If "Adjust the Close Dates as entered in the list below" is selected, enter the **New Close Date** in the respective textboxes.
8. If "Assign the following Close Date to all allocations listed" is selected, enter the **Units** to cancel in the textbox. Select **Apply.**
9. Enter any **comments.**
10. Select **Save Updates.**

Figure 62: Adjust Close Date Screen (Partial)

3.16 Clear Allocation

The Clear Allocation function allows the state to retract allocations of commodities that have not yet been ordered by the Contracting Entities. Once an allocation's Close Date has been reached, allocations containing unordered commodities will appear on the Clear Allocation - Open Allocations list allowing the allocation to be cleared. Clearing an allocation will result in the unordered commodities being moved to Surplus Inventory and will return any entitlement charged for the commodities to the Contracting Entities.

3.16.1 Clearing an Allocation

1. Select **Allocations** from **Entitlement menu.**
2. Select **Clear Allocation.**
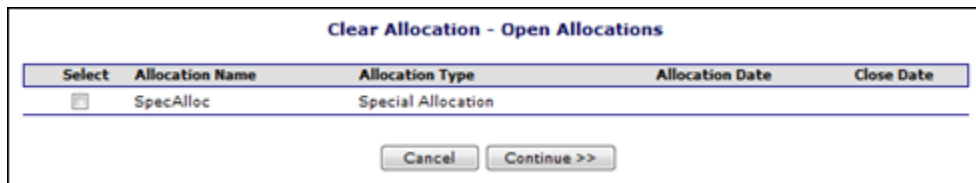
Figure 33: Clear Allocation – Open Allocation Screen

3. Select the **checkbox(es)** for allocation(s) to clear.
4. Select **Continue >>.**

Figure 64: Clear Allocation Screen

5. Enter **comments.**
6. Select **Clear Allocation.**

3.17 Distributions

The Distributions menu allows the State to manage all Contracting Entity orders.

Figure 65: Contracting Entity Orders Menu Screen

The Orders Component contains processes that facilitate the processing and management of Contracting Entities orders of commodities that have been allocated to them.

The standard ordering process flow is as follows:

1. The State allocates product to the Contracting Entities and notifies them of the allocation.

2. The Contracting Entities order from the allocated commodities and, if they choose, request that additional units be delivered should they become available from Surplus Inventory.

3. Orders are submitted by the Contracting Entities for each of their assigned Delivery Locations as needed based on their route schedule. Route schedules are coordinated between the CE and their assigned contracted warehouse. Orders may be modified at any time before they are processed as long as the Contracting Entity has not been locked out of their order forms.

4. Using the Contracting Entity Order Lockout maintenance function, the State may, after a designated period of time, lock the Contracting Entities out of their Allocation Orders allowing the state to clear any open allocations and to fill requests of additional units from the cleared allocations as Surplus Inventory.

5. When the State designated ordering period has expired, the State locks the Contracting Entities out of their orders and processes the orders allowing the orders to be released for picking. Pick lists and shipping documents are generated and may be printed by the warehouse or the state.

3.17.1 Accessing Distributions

1. On the blue menu toolbar, select **Operations.**
2. Select **Distributions** to access the Contracting Entity Orders menu.

3.18 Process Orders

On a periodic basis, orders must be processed in order to generate Bills of Lading and Warehouse Pick Lists. Orders from the same warehouse with the same distribution period are processed together. Once an order has been processed for a Distribution Period, the Distribution Period will close for the allocation group. Any new orders placed thereafter by Contracting Entities in the allocation group will be given the next Distribution Period assigned to the allocation group.

Individual orders or orders for an entire allocation group may be excluded from processing. Orders that are excluded from processing will remain open and retain the same Distribution Period until processed or cancelled. The Distribution Period will continue to appear on the Process Orders list until all of its orders have been processed or cancelled.

3.18.1 Processing Orders

1. Select **Contracting Entity Orders** from the Operations menu.
2. Select **Process Orders.**
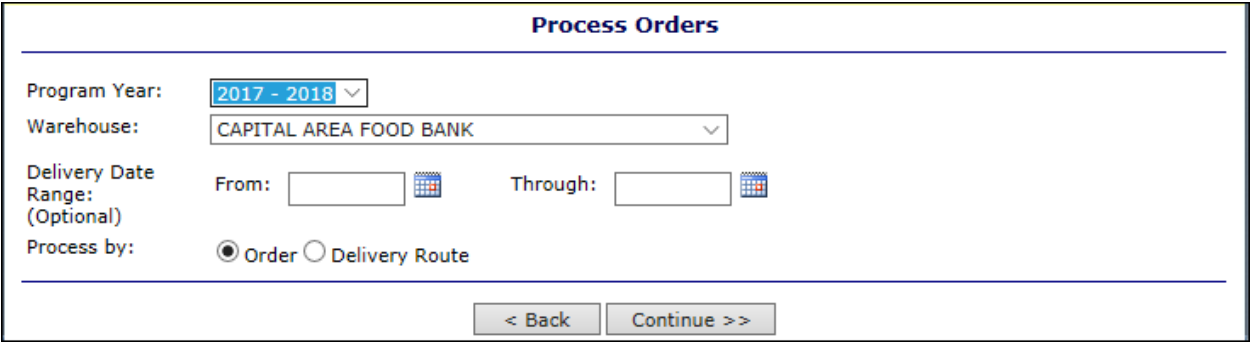
Figure 66: Process Orders - NSLP Screen

3. Select a **Program Year.**
4. Select a **Warehouse.**
5. Enter a **Delivery Date Range,** if applicable.
6. Select the **Process method.**
7. Select **Continue >>.**

Figure 67: Process Orders – Open Delivery Periods by Order Screen

8. Select **Continue >>**.

Figure 68: Process Orders – Open Delivery Periods Screen

Figure 69: Process Orders – Open Delivery Periods by Delivery Route Screen

9. Select the **checkbox** for each order to include in the batch.
10. Select **Continue >>**.
11. Select **Process Batch.**

3.19 Adjusting Contracting Entity Orders

The Adjust Contracting Entity Orders function allows the state to remove a selected commodity from one or more orders at a time. Only downward order adjustments are permitted. Order quantities removed from Allocation orders will be returned to the Contracting Entities' open allocation. If the units are no longer available to the Contracting Entities, the open allocations must be cleared.

3.19.1 Adjusting Contracting Entity Orders

1. Select **distributions** from the Operations menu.
2. Select **Adjust Contracting Entity Orders.**

Figure 70: Adjust Contracting Entity Orders Screen

3. Enter search criteria.

Please Note: Warehouse, Contracting Entity/CE ID, and Commodity are required.

4. Select **Display Orders** to access a list of orders matching the search criteria.

Figure 71: Adjust Contracting Entity Order - NSLP Screen

5. Check the **Clear All checkbox** for the Allocation Order Qty column to set the Order Qty for all orders to 0 or enter the adjusted order quantities as needed in the Allocation Order QTY fields.
6. Select **Continue >>.**
7. Select **Submit.**

Please Note: Open allocations resulting from the adjustment(s) may need to be cleared.

3.20 Contracting Entity Order Inquiry

The Contracting Entity Order Inquiry screen enables State users to search for and view Contracting Entity orders based upon selected criteria entered.

3.20.1 Processing Orders

1. Select **Distributions** from the Operations menu.
2. Select **Contracting Entity Order Inquiry.**
3. Enter Inquiry Criteria.

Figure 72: Contracting Entity Order Inquiry Screen

4. Select **Continue >>.**

Contracting Entity Order Inquiry

Order Criteria

Warehouse:	DEES FOOD SERVICE	Program Year:	
Delivery Date Range:	N/A	Order Status:	All Orders
Program:	NSLP		

Commodities

Item Number	Description	Pack Size	Order Qty
1-1416-20	Country Fried Brd Beef Patty Stick	125/3.88	730
1-155-525-20	Flamebroiled Beef Patties Caramel C	200/2.50	360
1-16-530-0	Flamebroiled Beef Salisbury Steak w	170/3.0	310
10001	51% WG Chs Filled Brd Sticks	182/2.12	420
100018	CHEESE PROCESS YEL SLC LVS-6/5 LB	6/5 LB LOAVES	19
100034	CHEESE MOZ LITE SHRED FRZ BOX-30 LB	30 LB CASE	4
100036	CHEESE BLEND AMER SKM YEL SLC LVS-6	6/5 LB LOAVES	3
100046	EGGS WHOLE FRZ CTN-6/5 LB	6/5 LB CASE	485
100101	CHICKEN DICED CTN-40 LB	40 LB CTN	22
100117	CHICKEN FAJITA STRIPS CTN-30 LB	30 LB CTN	1306
100119	TURKEY TACO FILLING CTN-30 LB	30 LB CTN	538
100121	TURKEY BREAST DELI FRZ CTN-40 LB	40 LB CTN	21
100122	TURKEY BREAST SMKD DELI FRZ CTN-40	40 LB CTN	179

Figure 43: Contracting Entity Order Inquiry - NSLP Screen (Display by Commodity)

5. Select the applicable **link** to view Contracting Entity order details.

Contracting Entity Order Inquiry

Order Criteria

Warehouse:	DEES FOOD SERVICE	Program Year:	
Delivery Date Range:	N/A	Order Status:	All Statuses
Program:	NSLP		

Orders

Order		Contracting Entity	Delivery Date	Order Status
17191	Activity	01196 - EL PASO COUNTY JUVENILE PROBATION CENTER	04/12/2013	Invoiced
19411	Activity	00344 - LA FE PREPARATORY SCHOOL	07/03/2013	Deleted
21960	Activity	01337 - ST PIUS X SCHOOL-EL PASO	07/02/2013	Deleted
22772	Activity	00349 - YSLETA ISD	08/19/2013	Invoiced
22773	Activity	00349 - YSLETA ISD	08/19/2013	Invoiced
22774	Activity	00349 - YSLETA ISD	08/19/2013	Invoiced
22775	Activity	00349 - YSLETA ISD	08/19/2013	Invoiced
22776	Activity	00349 - YSLETA ISD	08/19/2013	Invoiced
22777	Activity	00349 - YSLETA ISD	08/19/2013	Invoiced
22778	Activity	00349 - YSLETA ISD	08/19/2013	Invoiced

Figure 74: Contracting Entity Order Inquiry - NSLP screen (Display by Order Number)

3.21 Shipping

The Shipping component provides for the tracking of commodity shipments to Contracting Entities. When commodity orders are processed, the system flags the orders as 'Shipped'. Upon receipt of the commodity delivery from the warehouse, the Contracting Entities notify the state if there are any overages, shortages or damages (OSD). The state then utilizes the Shipment Receipt Adjustment function to adjust the shipped quantities as needed. The following table describes the features available from the Shipping menu.

Item	Description
Shipment Verifications	• Enables you to verify the shipment of selected orders.
Shipment Receipt Adjustments	• Enables you to adjust shipment verification.
Contracting Entity OS&D Reporting	• Enables you to view Contracting Entity delivery verifications and OS&D resolutions.
Shipping Inquiry	• Enables you to view Contracting Entity shipment information.

3.21.1 Accessing Shipping

1. On the blue menu toolbar, select **Operations.**
2. Select **Shipping** to access the menu.

Figure 75: Shipping Menu Screen

3.22 Shipping Verifications

The Shipment Verifications function enables you to verify easily verify the shipment of one or more orders at a time. A list of 'Processed' orders is displayed by Batch and Order Number allowing the user to select one or more orders to verify as shipped. If an order was not fully satisfied, the order will display in red and must be verified individually.

If a quantity less than what was ordered is verified as shipped, the difference will be returned to the contracting entity's allocation allowing the contracting entity to re-order the commodities not received. If the state wishes that the commodity not be available for ordering, the open allocation must be cleared or cancelled. When the allocation of the commodity is cleared or cancelled, the Contracting Entity's entitlement will be restored. This feature is useful for handling a recall of commodities in an order that has been processed but not yet shipped.

3.22.1 Verifying Multiple Shipments

1. Access **Shipping** from the Operations menu.
2. Select **Shipment Verifications.**
3. Enter the **criteria** needed to display the processed orders.
4. Select **Display Orders** to access the Shipping Verification Processed Orders list.

Figure 76: Shipment Verification – [Warehouse] Screen

5. Check the **'All Orders' checkbox** to select all orders that have been fully satisfied or check the individual **Batches or Orders** to verify and click on the Verify Orders button.

Figure 77: Shipping Verification Screen

3.22.2 Verifying a Single Order Shipment

1. Access **Shipping** from the Operations menu.
2. Select **Shipment Verifications.**
3. Select a **Warehouse.**
4. Select **Continue>>.**
5. Select a **Delivery Date.**
6. Select a **Batch #.**
7. Select an **Order #.**
8. Select a **Carrier.**
9. Click the **Display Orders button.**

Figure 78: Shipping Verification – Warehouse Screen

10. The Shipping Verification screen displays.

11. Select the **Order # link** to verify the order.

12. Click the **Verify Orders button.**

Figure 79: Shipping Verification Screen

13. Enter the appropriate **Ship Qty** in the textboxes, if the total is different from the Order Qty values that automatically prepopulate in the respective textboxes.

14. Enter any **comments**.

15. Select **Continue.**

Figure 80: Shipment Verification Form Screen

16. **Validate** the information.
17. Select **Verify.**

Please Note: If any changes are made to the Batch Information section, select Save Batch Information Changes.

3.22.3 Modifying Batch Information

1. Access **Shipping** from the Operations menu.
2. Select **Shipment Verifications.**
3. Select a **Warehouse.**
4. Select **Continue >>.**
5. Select a **Delivery Date.**
6. Select a **Batch #.**
7. Select an **Order #.**
8. Select a **Carrier.**
9. Select **Display Orders.**
10. Select the **Batch # link** for the applicable order.
11. Make any **revisions.**
12. Select **Save.**
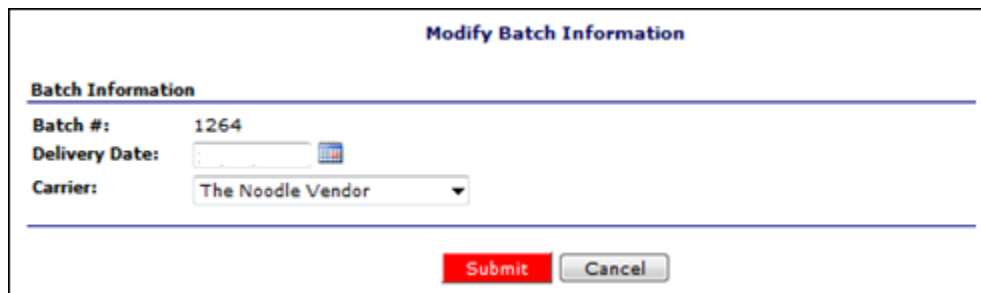
Figure 81: Modify Batch Information Screen

3.23 Shipment Receipt Adjustments

The Shipment Receipt Adjustments function allows for adjustments to be made to the shipment form after the contracting entity has received the order. Shipping verifications are adjusted to provide for damaged goods or recalls of shipped commodities. As with the Shipping 'Verification' function, adjustments to the SHIP QTY of a commodity will result in adjustments to the contracting entity's allocations and, if applicable, the contracting entity's entitlement.

3.23.1 Adjusting a Shipping Receipt

1. Access **Shipping** from the Operations menu.
2. Select **Shipment Receipt Adjustments.**

Figure 82: Shipping Receipt Adjustment Screen

3. Enter an **Order Number.**
4. Select **Continue >>.**

Figure 83: Shipping Receipt Adjustment Screen

5. Enter the **number of undamaged units** that were received in the Total Received Qty textbox.
6. Enter the **number of damaged units** in the Damaged Qty textbox.
7. Enter any **comments.**
8. Select **Continue >>.**
9. Select **Adjust Shipment.**

3.24 Contracting Entity OS&D Reporting

The Contracting Entity Overages, Shortages, and Damages (OS&D) Reporting function allows State users to monitor Contracting Entity OS&D reports and resolutions. The Contracting Entity OS&D Reporting – OS&D Report Search screen enables state users to search for reports based upon selected criteria. State users only have access to this function.

3.24.1 Viewing an OS&D Report

1. Access **Shipping** from the Operations menu.
2. Select **Contracting Entity OS&D Reporting.**
3. Use any or all the criteria below to search for an **OS&D Reporting:**
   o Program Year
   o Program
   o Warehouse
   o Contracting Entity Name
   o CE ID
   o OS&D Report Status
   o Order Number (Optional)
   o Delivery Date Range (Optional)

Tip: The OS&D Report List displays based upon the criteria chosen. If no choices were made, the list displays all shipped orders based upon the criteria defaults.

Shipment Search

Shipment Search

Program Year:	2017 - 2018
Program:	NSLP
Warehouse:	All Warehouses
Contracting Entity Name:	All Contracting Entities
CE ID:	
OS&D Report Status:	All Reports
Order Number: (Optional)	
Delivery Date Range: (Optional)	From: Through:

< Back   Display Shipments   Cancel

Figure 84: Overages, Shortages & Damages (OS&D) Reporting Screen

4. Select **Display Shipments.**

Figure 85: Overages, Shortages & Damages (OS&D) Reporting Screen

5. Select **Order Number link**. The **OS&D Report and resolution,** if available will display.

Figure 86: Overages, Shortages & Damages (OS&D) Report Screen

3.25 Shipping Inquiry

The Shipping Inquiry screen enables the user to search for shipments to a specified agency based upon selected criteria.

3.25.1 Viewing a Shipment Detail

1. Select **Shipping** from the Agency menu.
2. Select **Shipping Inquiry.**
3. Complete the **search criteria** and select **Continue >>.**
4. Select a **Link.**

Figure 87: Shipping Inquiry Screen

5. The Commodity List displays. Select **< Back** to return to the previous screen.

Figure 88: Agency Order Screen

3.26 Surveys

Commodity Surveys are used to gather information from contracting entities participating in the FDP and to allocate commodities. Surveys are set up by the State and completed on-line by the Contracting Entity. Only contracting entities that are eligible for the survey at the time the survey is created will have access to the online survey. Contracting Entities becoming eligible for a survey at a later date can be added to the survey using the 'Modify Survey' function.

Please Note: Survey types/names are managed by the State within the Maintenance functionality and are subject to change.

The Surveys menu allows management of all survey functions for the State user. The following table describes the features available from the Surveys menu.

Item	Description
Survey Setup	• Enables you to create a survey
Modify Survey	• Enables you to modify a survey
Create Annual Survey Orders	• Enables you to convert requests into truckload units for ordering
Process Hold/Recall Survey	• Enables you to view survey results and/or restore entitlement for recalled commodities
Survey Notifications	• Enables you to generate survey notifications
Survey Load Balancing	• Enables you to access survey load balancing worksheets
Process Survey	• Enables you to fill survey requests
Process Diversions	• Enables you to schedule diversions of raw commodities for processing

3.26.1 Accessing Surveys

1. On the blue menu toolbar, select **Operations.**
2. Select **Surveys** to access the menu.

Item	Description
Survey Setup	Create a Survey
Modify Survey	Modify an Existing Survey
Create Annual Survey Orders	Create Inbound Shipments for Annual Surveys
Process Hold/Recall Survey	View survey results and/or Restore entitlement for recalled commodities
Survey Notifications	Generate Survey Notifications
Survey Load Balancing	Access Survey Load Balancing Worksheets
Process Survey	Fill Survey Requests
Process Diversions	Schedule Diversions of Raw Commodities for Processing

< Back

Figure 59: Surveys Menu Screen

3.27 Survey Setup

State users create surveys using the Survey Setup function. Screen flows and information gathered on the screens will vary based on the survey type. Commodities offered on a Periodic or Processing survey may be pre-allocated, allowing contracting entities to request no more than their 'fair share' of an available commodity.

Choosing a Commodity Group and/or Commodity Class will limit the list of commodities that may be included in the survey.

3.27.1 Creating a Periodic (Monthly) Survey

1. Access **Surveys** from the Operations menu.
2. Select **Survey Setup.**
3. Enter all **Survey Information** criteria (shown below), including selecting Periodic Survey as the Survey Type.
4. Select **Continue >>.**

Survey Setup

Survey Information

Program Year:	2017 - 2018 ⌄
Program:	NSLP ⌄
Survey Type:	⌄
Survey Name:	
Processing Co-op:	Not Applicable ⌄
Ship Type:	⌄
Survey Date:	12/05/2017 📅
Close Date:	📅
Pre-allocate Commodities:	○ Yes ◉ No
Special Instructions:	

Contracting Entity Criteria

Include Allocation Groups:
- ☐ Check/Un-check All
  - ☐ CBBC Dallas
  - ☐ Central Texas Food Bank
  - ☐ Dees Food Service
  - ☐ Direct Ship Schools
  - ☐ FMNP/SFMNP
  - ☐ Food Bank Group
  - ☐ Food Bank RGV
  - ☐ Houston Food Bank
  - ☐ San Antonio Food Bank
  - ☐ Tejas Coop-(LABATT)
  - ☐ US Food Service

Commodity Criteria

Commodity Group:	All Groups ⌄
Commodity Class:	All Classes ⌄

Cancel   Continue >>

Figure 90: Survey Setup Screen

5. Select the **checkbox(es)** to indicate which months will be included in the survey. The months selected apply to all commodities.
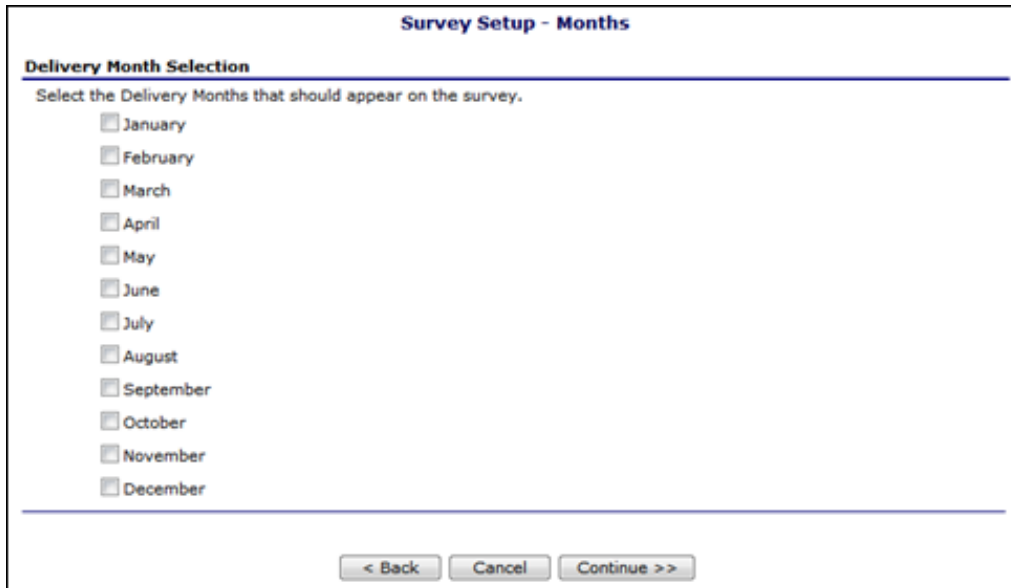
Figure 91: Survey Setup – Months (Periodic) Screen

6. Select **Continue >>.**
7. Select the **checkbox(es)** to indicate which commodities will be included in the survey.
8. Select the **Commodity Type** for each commodity to be included.
9. Select the **Charge Entitlement value** for each commodity to be included.
10. Select **Save.**

3.27.2 Creating a Farm to School Survey

1. Access **Surveys** from the Operations menu.
2. Select **Survey Setup.**
3. Enter all **Survey Information criteria**, including selecting Farm to School Survey as the **Survey Type.**
4. Select **Continue >>.**
5. Select the applicable **commodities** to include.
6. Click **Continue >>.**
7. Use the **calendar function** to select or enter the applicable week for each commodity.
8. Select **Continue >>.**
9. Select **Save.**

3.27.3 Creating a Hold/Recall Request Survey

1. Access **Surveys** from the Operations menu.
2. Select **Survey Setup.**
3. Enter all **Survey Information criteria**, including selecting Hold/Recall Survey as the Survey Type.
4. Select **Continue >>.**
5. Select the applicable **commodities** to include.
6. Enter the **Cans/Unit per case.**
7. Enter the **Cans/Unit value.**
8. Select **Continue >>.**
9. Enter the **Code** in the textbox.
10. Select **Add Code.**
11. Select **Continue >>.**
12. Select **Save.**

3.27.4 Creating a Processing Survey

1. Access **Surveys** from the Operations menu.
2. Select **Survey Setup.**
3. Enter all **Survey Information** criteria, including selecting **Processing Survey** as the Survey Type.
4. Select **Continue >>.**
5. Select the applicable **commodities** to include.
6. Select the **Commodity Type** for each commodity to be included.
7. Enter **values** for Minimum TLS, Minimum Units, and Min. Units to Multiple Processors.
8. Select **Continue >>.**
9. Select **Save.**

3.27.5 Creating an Annual Survey

1. Access **Surveys** from the Operations menu.
2. Select **Survey Setup.**
3. Enter all **Survey Information criteria**, including selecting **Annual Request** as the **Survey Type.**
4. Select **Continue >>.**
5. Select the applicable **commodities** to include.
6. Select **Continue >>.**
7. Select **Save.**

3.28 Modify Survey

The Modify Survey function allows State personnel to make various changes to an existing survey, as well as update the status of the survey from Open to Closed.

3.28.1 Modifying a Survey

1. Access **Surveys** from the Operations menu.
2. Select **Modify Survey.**

Modify Survey

Survey Search

Program Year:	2017 - 2018 ∨
Program:	NSLP ∨
Survey Type:	All Survey Types ∨
Survey Status:	All Statuses ∨
Survey Name:	

[Display Surveys] [Cancel]

Figure 92: Modify Survey – Survey Search Screen

3. Select **Program Year** from drop-down.
4. Select **Program** from drop-down.
5. Select **Survey Type** from drop-down.
6. Select **Survey Status.**
7. Enter the **Survey Name.**
8. Select **Display Surveys** to access a list of all available surveys.

Modify Survey - NSLP

Available Surveys

Survey #	Survey Type	Survey Name	Action
2242	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-CBBC-DALLAS	Modify Survey
2243	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-CTFB	Add Contracting Entity
2245	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-FB RGV	Remove Contracting Entity / Add Commodity
2246	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-HOUSTON FB	Remove Commodity / Disable Commodities
2247	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-SAFB	∨
2248	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-TEJAS	∨
2249	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-US FOODS	∨
2244	Annual Survey	Beef-Pork=Poultry-Fish-Eggs-DEES	∨
2250	Annual Survey	Dairy Items-CBBC-DALLAS	∨
2252	Annual Survey	Dairy Items-DEES	∨

Figure 93: Modify Survey – Available Surveys Screen (Partial)

9. Select **Modify Survey** from the drop-down list to select a specific survey to modify.

10. Make any necessary **revisions.**

11. Select **Save Changes.**

12. Click **Finish.**

Figure 94: Modify Survey – Modify Screen

3.28.2 Adding/Modifying a Contracting Entity for a Survey

Please Note: The **Modify Contracting Entity** button allows you to add a CE to access the survey. If the CE submitted their contract "after" the survey was created, the CE would not have access to the survey.

1. Access **Surveys** from the Operations menu.

2. Select **Modify Survey.**

3. Select **Program Year** from drop-down.

4. Select **Program** from drop-down.

5. Select **Survey Type** from drop-down.

6. Select **Display Surveys.**

7. Select **Add Contracting Entity** from the drop-down list for a specific survey to modify.

8. Select the **checkbox(es)** for the Available Contracting Entities to add.

9. Select **Add Contracting Entity.**

3.28.3 Removing a Contracting Entity from a Survey

1. Access **Surveys** from the Operations menu.
2. Select **Modify Survey.**
3. Select **Program Year** from the drop-down.
4. Select **Program** from the drop-down.
5. Select **Survey Type** from the drop-down.
6. Select **Display Surveys.**
7. Select **Remove Contracting Entity** from the drop-down list for the specific survey to modify.
8. Select the **applicable Contracting Entity** from the drop-down list.
9. Select the **Remove Contracting Entity** from Survey.

3.28.4 Adding a Commodity to a Survey

1. Access **Surveys** from the Operations menu.
2. Select **Modify Survey.**
3. Select **Program Year** from the drop-down list.
4. Select **Program** from the drop-down list.
5. Select **Survey Type** from drop-down.
6. Select **Display Surveys.**
7. Select **Add Commodity** from the drop-down list for the applicable survey.
8. Select the **checkboxes** for each commodity that is to be added.
9. Select the **Commodity Type** from the drop-down list.
10. Select whether to **Charge Entitlement** for the commodity.
11. Select **Add Selected Commodities.**
12. Click **Finished.**

Figure 95: Modify Survey – Add Commodities Screen (Partial)

3.28.5 Removing a Commodity from a Survey

1. Access **Surveys** from the Operations menu.
2. Select **Modify Survey.**
3. Select **Program Year** from the drop-down list.
4. Select **Program** from the drop-down.
5. Select **Survey Type** from the drop-down.
6. Select **Display Surveys.**
7. Select **Remove Commodity** from the drop-down list for the applicable survey.

					DELETE

Modify Survey - Remove Commodities

Survey Information

Program Year:	2017 - 2018
Program:	NSLP
Survey Type:	Processing Survey
Survey Name:	Direct Ship-Staples #1
Pre-allocate Commodities:	No
Processing Co-op:	Direct Ship Sch
Allocation Groups:	

Commodity Selection

Select	Commodity	Type	Minimum TLS	Minimum Units	Min. Units Multiple Processors
☐	100420 - FLOUR BAKER HRTH UNB	E	1	1	1
☐	100417 - FLOUR BKR BLCH BULK	E	1	1	1
☐	100418 - FLOUR BKR UNBL BULK	E	1	1	1
☐	100912 - FLOUR BREAD-BULK	E	1	1	1
☐	200409 - Flour Whole Wheat	E	1	1	1
☐	100443 - OIL VEGETABLE BULK	E	1	1	1
☐	100397 - Peanut Butter Drum	E	1	1	1
☐	110700 - Peanuts Raw Shelled	E	1	1	1
☐	201031 - Rice Brn US#1 LPB 25	E	1	1	1

Remove Selected Commodities   < Return to Survey List   Cancel

Figure 96: Modify Survey – Remove Commodities Screen

8. Select the **checkbox** for each commodity to remove.
9. Select **Remove Selected Commodities.**
10. Click **Finish.**

3.28.6 Adding/Removing Months For/From a Survey (Periodic Surveys)

1. Access **Surveys** from the Operations menu.
2. Select **Modify Survey.**
3. Select **Program Year** from the drop-down.
4. Select **Program** from the drop-down.
5. Select **Survey Type** from the drop-down.

6. Select **Display Surveys.**

7. Select **Add/Remove Months** from the drop-down list for a specific survey.

8. Select/de-select **applicable months.**
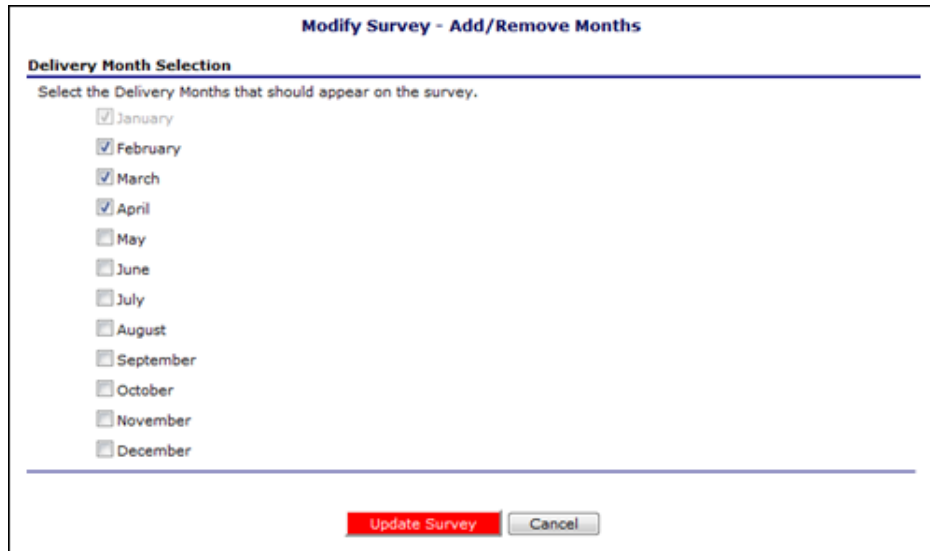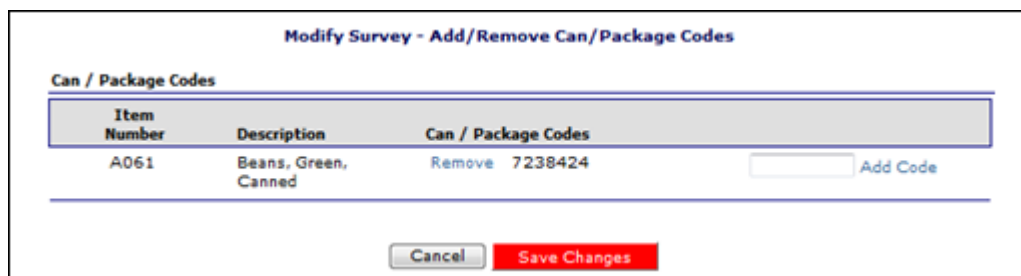
9. Select **Update Survey.**

Figure 97: Modify Survey – Add/Remove Months Screen

3.28.7 Adding/Removing Can/Package Codes (Hold/Recall Surveys)

1. Access **Surveys** from the Operations menu.

2. Select **Modify Survey.**

3. Select **Program Year** from the drop-down list.

4. Select **Program** from the drop-down list.

5. Select **Survey Type** from the drop-down list.

6. Select **Display Surveys.**

7. Select **Add/Remove Can/Package Codes** from the drop-down list for a specific survey.

8. Enter the **code** in the textbox and select **Add Code** or select **Remove** for the applicable code.
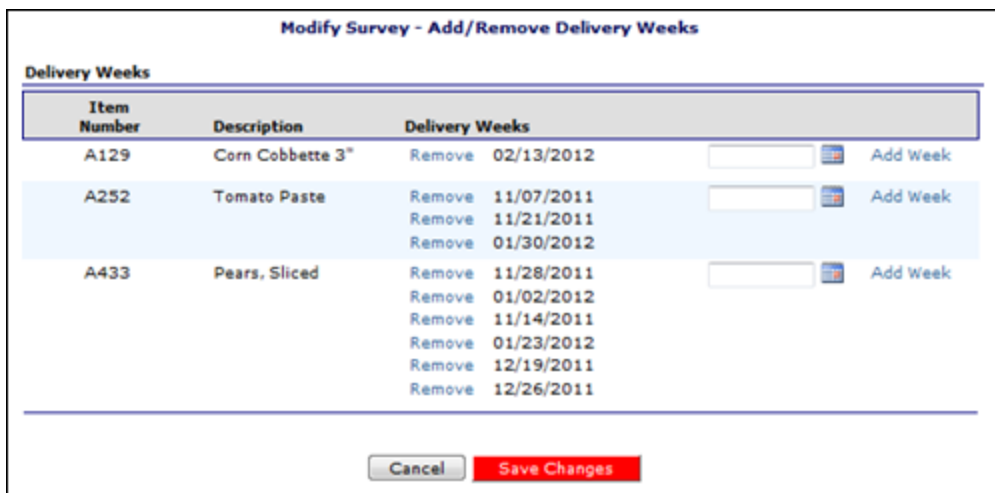
9. Select **Save Changes.**

Figure 98: Modify Survey – Add/Remove Can/Package Codes Screen

3.28.8 Adding/Removing Weeks (Farm to School Surveys)

1. Access **Surveys** from the Operations menu.
2. Select **Modify Survey.**
3. Select **Program Year** from the drop-down list.
4. Select **Program** from the drop-down list.
5. Select **Survey Type** from the drop-down list.
6. Select **Display Surveys.**
7. Select **Add/Remove Weeks** from the drop-down list for the applicable survey.
8. Enter the **date in the textbox** and select **Add Week** or select **Remove** for the chosen week.
9. Select **Save Changes.**

Figure 99: Modify Survey – Add/Remove Weeks Screen

3.28.9 Disable Commodities on an Annual Survey

1. Access **Surveys** from the Operations menu.
2. Select **Modify Survey.**
3. Select **Program Year** from the drop-down list.
4. Select **Program** from the drop-down list.
5. Select **Survey Type** from the drop-down list.
6. Select **Display Surveys.**
7. Select **Disable Commodities** from the drop-down list for a specific survey.
8. Select the applicable commodities to disable by clicking the **Disable checkbox** or select **Check/Uncheck All.**
9. Select **Disable Selected Commodities.**

3.29 Creating Annual Survey Orders

The Create Annual Survey Orders function allows state users to schedule and create WBSCM Food Orders based on Annual Survey request information.

3.29.1 Creating an Order

1. Access **Surveys** from the Operations menu.
2. Select **Create Annual Survey Orders**.
3. Select the **Program Year** and **Program.**
4. Select **Continue**.

Figure 100: Create Annual Survey Orders – Survey Criteria Screen

5. Select a **Commodity** by clicking on the appropriate **Item Number.**
6. Select **Continue.**

Figure 101: Create Annual Survey Orders Screen (Partial Screen)

7. Select your desired **Warehouse** by selecting the **Checkbox.**
8. Select **Continue.**
9. Input the **number of trucks** needed for each delivery date in the blank fields.
10. Select **Continue.**

Figure 102: Create Annual Survey Orders – Scheduled Shipments Screen

11. To create the orders, select **Create Orders**. Otherwise, select **Finished** or **Edit** to make changes.

Figure 103: Create Annual Survey Orders – Save Confirmation

12. Select the **Requested Ship Date, Order Type,** and how you want to **Display Existing Orders**.

13. Select **Continue.**

Figure 104: Create Annual Survey Orders – Create Orders

14. Select all **Warehouses**.

15. Select **Create Orders.**

Figure 105: Create New Orders – Full Trucks Screen

3.29.2 Clearing Remaining Units

1. Access **Surveys** from the **Operations menu.**
2. Select **Create Annual Survey Orders.**
3. Select the **Program Year and Program.**
4. Select **Continue.**

Figure 106: Create Annual Survey Orders – Clear Remaining Units Screen

5. Select all applicable commodity units to clear by selecting the **Checkbox**.
6. Select **Clear Remaining Units.** A pop-up dialogue box will display to verify if the user would like to proceed with the action.
8. Select **OK.**

Figure 107: Create Annual Survey Orders – Clear Remaining Units Screen

3.30 Process Hold/Recall Survey

The Process Hold/Recall Survey function enables you process commodities holds or survey recalls for a specific survey.

3.30.1 Sending a Survey Notification

1. Access **Surveys** from the **Operations menu.**
2. Select **Process Hold/Recall Survey.**

Figure 108: Process Hold/Recall Survey Screen

3. Select the **Program Year.**
4. Select the **Program.**
5. Select the applicable **Survey.**
6. Select **Continue >>** to access the **Survey Information screen.**

Figure 109: Process Hold/Recall Survey Screen

7. Validate the information displayed.
8. Select **"Yes"** or **"No"** for **Restore Entitlement.**
9. Enter any **comments.**
10. Select **Process Survey.**
11. Select **"OK"** to confirm.

3.31 Survey Notifications

The Survey Notifications function enables you to send notification messages to Contracting Entity contacts regarding a specific survey.

3.31.1 Sending a Survey Notification

1. Access **Surveys** from the **Operations menu.**
2. Select **Survey Notifications.**
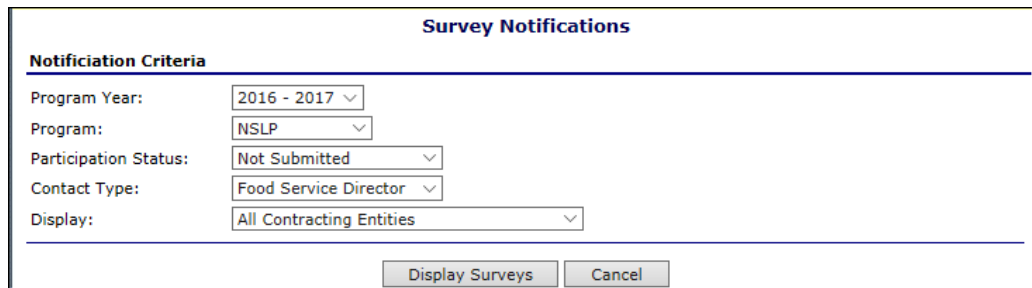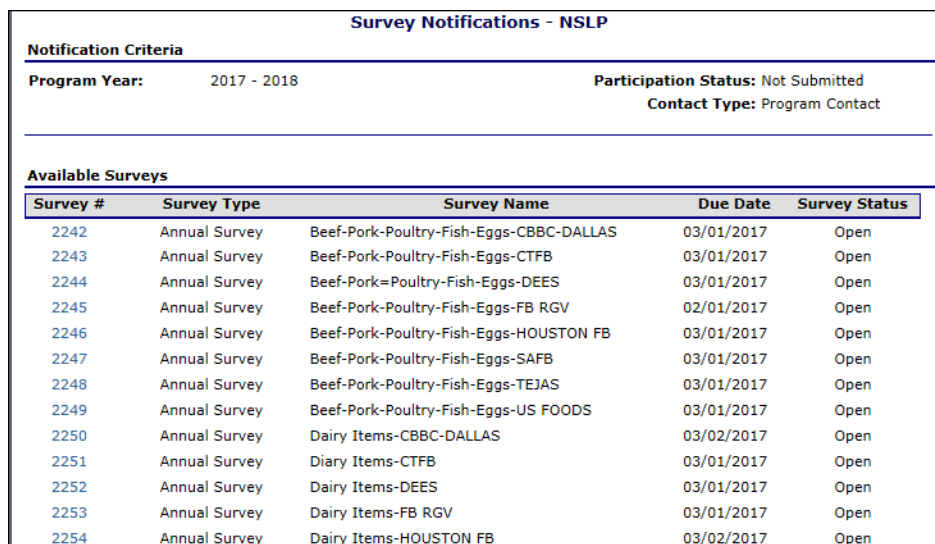
Figure 110: Survey Notifications – Notification Criteria Screen

3. Use the **search criteria** to **filter surveys.**
4. Select **Display Surveys.**

Figure 111: Survey Notifications –Available Surveys Screen (Partial)

5. Select the **link** for the applicable survey number.

6. Select **Continue >>.**

7. Enter **Subject text.**

8. Enter **E-mail text.**

9. Select **Send Notifications.**
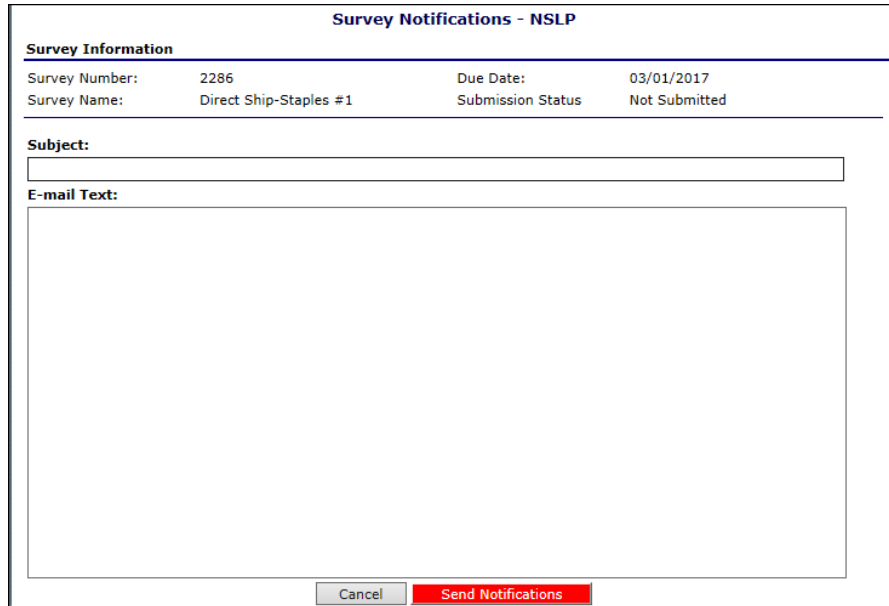
Figure 112: Survey Notifications – NSLP Screen

3.32 Survey Load Balancing

The Survey Load Balancing function displays the Processing and Periodic Survey requests as a worksheet for the purposes of USDA ordering. USDA restricts shipments of commodities to full truckloads, the survey results must be reviewed and adjusted accordingly. The Load Balancing function totals the Processing Survey results by processor choices and assists in diverting full truckloads to processors.

3.32.1 Viewing Survey Load Balancing Worksheets (for Processing Surveys)

1. Access **Surveys** from the Operations menu.

2. Select **Survey Load Balancing.**

3. Select **Processing Surveys.**

Figure 113: Load Balancing – Processing Surveys Screen

4. Select the **Program Year** from the drop-down list.

5. Select the **Program** from the drop-down list.

6. Select the **Survey Name/Number.**

7. Select the **Contracting Entity.**

8. Select the **Processing Co-op.**

9. Select **Continue >>.**

Load Balancing - NSLP

Processing Surveys

Program Year: 2017 - 2018

Item Number	Description	Type	Units Requested	Truck Load	Total Trucks
100047	EGGS WHOLE LIQ Bulk-Tank	Entitlement	368	48,000	0.01
100103	CHICKEN LARGE CHILLED BULK	Entitlement	4,082	36,000	0.11
100154	BEEF COARSE GRND FRZ Ctn-60 Lb	Entitlement	1,683	42,000	0.04
100193	PORK PICNIC BONELESS FRZ 60 Lb	Entitlement	274	40,020	0.01
110227	Potato for Process into Dehy Prd-Bu	Entitlement	3,477	40,000	0.09
110242	CHEESE NAT AMER FBD BARREL-500 LB(4	Entitlement	1,155	40,800	0.03
110244	CHEESE MOZ LM Pt SKM UNFR PROC PK	Entitlement	1,035	41,125	0.03

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Figure 114: Load Balancing – NSLP Screen (Processing Surveys)

10. Select an **Item Number link.**

Load Balancing Worksheet - NSLP

Processing Surveys

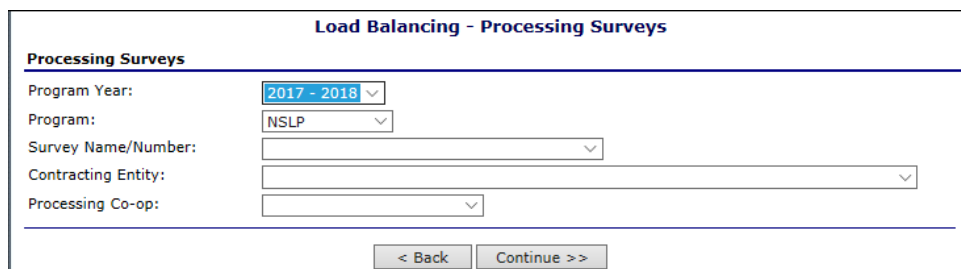|			
Commodity:	110242 - CHEESE NAT AMER FBD BARREL-500 LB(4	**Truck Load:** 40,800	
Commodity Type:	Entitlement	**Total Trucks:** 0.03	
Survey Name:	All Surveys	**Processing Coop:** Multiregional	
Contracting Entity:	HONEY GROVE ISD		

Select a contracting entity to adjust the contracting entities survey.

Survey #	CE ID	Contracting Entity	Processor	Units Requested
2345	00369	HONEY GROVE ISD	Bongards Creameries	1,020
2345	00369	HONEY GROVE ISD	Land O Lakes	135
			Total Units Requested:	**1,155**

Processor Totals

Processor	Units Requested	Total Trucks	+/-
Bongards Creameries	1020	0.025000	+ 9,180 - 1,020
Land O Lakes	135	0.003308	+ 10,065 - 135

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Figure 115: Load Balancing Worksheet – NSLP Screen (Processing Surveys)

Select a **Contracting Entity link.**

Figure 116: Survey Form – NSLP (Partial)

Please Note: Select **Calculate Entitlement** at any time to recalculate entitlement based upon the values entered above.

11. Select **Continue >>.**
12. Select **Submit Survey.**

3.32.2 Viewing Survey Load Balancing Worksheets (for Periodic Surveys or Direct Ship Orders)

1. Access **Surveys** from the Operations menu.
2. Select **Survey Load Balancing.**
3. Select **Periodic Surveys** or **Direct Ship Orders.**

Figure 117: Load Balancing Screen

4. Select the **Program Year** from the drop-down list.

5. Select the **Program** from the drop-down list.

6. Select the **Survey Delivery Month** or **Order Shipment Month** from the drop-down list(s).

7. Select **Continue >>.**

8. Select **Display Orders.**

Figure 118: Load Balancing – NSLP Screen (Periodic Surveys)

9. Select a **Warehouse link** to view the survey details.

Figure 119: Load Balancing Worksheet – NSLP screen (Periodic Surveys)

10. Select a **Contracting Entity link** to access the Contracting Entity's survey form if adjustments are required.
11. Complete the **survey form.**
12. Select **Continue >>.**
13. Select **Submit Survey.**

3.33 Process Survey

The Process Survey function allows the state to fill Periodic Survey requests by allocating inventory that is received by the warehouse each month. Once allocated, the commodities appear on the Contracting Entities' order forms allowing the Contracting Entities to select a delivery location and delivery period. In the event an inbound shipment is cancelled or there is not sufficient inventory to fully satisfy the requests, the system will allocate the available inventory on a pro-rated basis. The remaining, unfilled requests can be cleared from the survey restoring the Contracting Entities' entitlement.

3.33.1 Processing a Periodic Survey – Allocate Commodities

1. Access **Surveys** from the Operations menu.
2. Select **Process Survey.**

Figure 120: Process Survey – Survey Search Screen

3. Select a **Program Year.**

4. Select a **Program.**

5. Select a **Warehouse.**

6. Click **Display Surveys.**

Figure 121: Process Survey – Available Surveys Screen

7. Select the **link** for the applicable **Survey number.**

Figure 122: Process Survey – Allocate Commodities Screen

8. Select **Allocate Commodities** or **Clear Remaining Units radio button.**

9. Select **Month to Process** from the drop-down list.

10. Select **Continue >>.**

Figure 63: Process Survey – Allocate Commodities Screen

11. Enter **Allocation Name.**

12. Enter **"Allocate"** amounts for Unallocated and/or Surplus Inventory.

13. Select **Continue >>.**

14. Select **Submit Allocation.**

Figure 124: Process Survey – Allocate Commodities - Submit Screen

3.33.2 Processing a Periodic Survey – Clear Remaining Units

1. Access **Surveys** from the Operations menu.

2. Select **Process Survey.**

3. Select a **Program Year.**

4. Select a **Program.**

5. Select a **Warehouse.**

6. Select **Display Surveys.**

Figure 125: Process Survey – Available Surveys Screen

7. Select a **link** for an Available Survey.

8. Select **Clear Remaining Units.**

9. Select the **Month to Process.**

10. Select **Continue >>.**

Figure 126: Process Survey –Clear Remaining Units Screen

11. Select or de-select any applicable **commodities.**

12. Enter any **Comments.**

13. Select **Continue >>.**

13. Select **Clear Allocations.**

Process Survey - Clear Remaining Units - NSLP

Survey Information

Survey Number:	2282	Warehouse:	AUSTIN ISD
Survey Name:	DIRECT SHIP REGULAR REQ SY2018	Delivery Month:	July, 2017
Survey Type:	Periodic Survey		

Commodities

Item Number	Description	Type	Remaining Units
100261	APRICOTS FROZEN CUP 96/4.5 OZ	E	1,400
100351	BEANS GREEN FRZ CTN-30 LB	E	1,320
100365	BEANS PINTO CAN-6/10	E	864
100352	CARROTS SLICED NO SALT FRZ 30 LB	E	660
100219	PEACHES CLING SLICES EX LT CAN-6/10	E	912
100253	STRAWBERRY FRZ CTN-30 LB	E	1,320

Comments:

[Clear Allocations] [< Back] [Cancel]

Figure 127: Process Survey –Clear Remaining Units – Clear Screen

3.34 Process Diversions

The Process Diversions function allows the state to calculate and create diversions of raw commodities to processors based on diversion requests submitted in Processing Surveys. Creating a Diversion generates diversion notification reports which may be sent to Processors and Contracting Entities notifying each of the diversion, estimated delivery date, and Contracting Entity and processor contact information. Included in the Process Diversions module is the ability to create allocations of raw commodities to divert the commodities for Contracting Entities.

3.34.1 Divert Commodities

1. Access **Surveys** from the Operations menu.
2. Select **Process Diversions.**

Process Diversions

Program Year:	2017 - 2018 ⌄
Program:	NSLP ⌄
Survey:	All Surveys ⌄
Processing Co-op:	All Processing Co-ops ⌄
Diversion Number (Optional):	
Process to Run:	Manage Diversions ⌄

[Continue >>] [Cancel]

Figure 128: Process Diversions - Process to Run Screen

3. Select a **Program Year** from the drop-down list.

4. Select a **Program** from the drop-down list.

5. Select a **Processing Co-op** from the drop-down list.

6. Select a **Process to Run.**

7. Select **Continue >>.** The Commodities to Divert list screen will display a listing of all commodities included in Processing Surveys for the selected program and program year.

Figure 129: Process Diversions – Divert Commodities Screen

8. Select the **Item Number** to divert.

Figure 130: Process Diversions – Divert Commodities Screen

Please Note: Action links may be active or inactive depending on the allocation status. The View link is always active while the Modify and Delete and Post Allocations are active until allocations have been posted. Process Orders is active once the allocations have been posted and the orders have not been processed.

9. Select a **Processor name** to divert commodities.

Figure 131: Process Diversions – Divert Commodities Screen

10. Select **New Diversion.**

Figure 732: Process Diversions – Divert Commodities Screen (Partial Screen)

11. Complete the **Delivery Information section.**

12. Enter the **Units to Divert.**

13. Select **Calculate.** The System calculates the Divert Qty. These fields may be changed manually.

14. Select **Continue >>.**

15. Select **Submit** to confirm diversions.

3.34.2 Viewing or Modifying Diverted Commodities

1. Access **Surveys** from the Operations menu.

2. Select **Process Diversions.**

3. Select a **Program Year** from the drop-down list.

4. Select a **Program** from the drop-down list.

5. Select **Divert Commodities.**

6. Select **Continue >>.**

7. Select a **Commodity** using the Item Number link.

8. Select a **Processor.**

9. Select **View** or **Modify** for a delivery date.

10. Make any necessary changes.

11. Select **Continue >>.**

12. Select **Submit** to confirm.

3.34.3 Deleting Diverted Commodities

1. Access **Surveys** from the Operations menu.

2. Select **Process Diversions.**

3. Select a **Program Year** from the drop-down list.

4. Select a **Program** from the drop-down list.

5. Select **Continue >>.**

6. Select a **Commodity** using the Item Number link.

7. Select a **Processor.**

8. Select **Delete** for a delivery date.

9. Select **Delete** to confirm.

3.34.4 Posting Diverted Commodities

1. Access **Surveys** from the Operations menu.

2. Select **Process Diversions.**

3. Select a **Program Year** from the drop-down list.

4. Select a **Program** from the drop-down list.

5. Select **Continue >>.**
6. Select a **Commodity** using the Item Number link.
7. Select a **Processor.**
8. Select **Post Allocations** for a delivery date.

Process Diversions - Divert Commodities - NSLP

Post Allocations

Commodity to Divert

Commodity:	200212 - Mixed Fruit Can-6/10 PROC	**Processor:**	Wawona Foods (Main Contractor)
Type:	Entitlement	**Delivery Date:**	07/01/2016 - 09/30/2016
Survey Name:	All Surveys	**Processing Co-op:**	Prospering Pals

Allocation Information

Allocation Name:		**Allocation Date:**	12/05/2017

	Unallocated Inventory		Surplus Inventory	
Diverted	**Available**	**Allocate**	**Available**	**Allocate**
36,252	0		0	

Allocation Detail

Survey #	Contracting Entity	Allocation Qty
2037	01018 - BIRDVILLE ISD	36,252
	Total:	**36,252**

Cancel   Continue >>

Figure 133: Process Diversions – Divert Commodities – Post Allocations Screen

9. Enter the **Allocation Name.**
10. Enter the **Allocation Date.**
11. Enter the quantity to allocate for the **Unallocated Inventory.**
12. Select **Continue >>.**
13. Select **Submit.**

3.34.5 Processing Orders for Diverted Commodities

1. Access **Surveys** from the Operations menu**.**
2. Select **Process Diversions.**
3. Select a **Program Year** from the dropdown.
4. Select a **Program** from the dropdown.
5. Select **Continue >>.**
6. Select a **Commodity** using the Item Number link.
7. Select a **Processor.**
8. Select **Process Orders** for a delivery date.

9. Enter the **Begin Date.**
10. Enter the **End Date.**
11. Select **Continue >>**.
12. Review the information and select **Process Orders.**

3.35 Inventory

The Inventory component provides the capability to locate unallocated and surplus inventory, as well as make inventory adjustments and transfers of unallocated and surplus inventory between warehouses, programs, and years.

Item	Description
Inquiry	View Unallocated and Surplus Inventory
Adjustments	Adjust Inventory Levels
Transfer	Transfer Inventory between Warehouses, Programs, Fiscal Years, etc

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Figure 134: Inventory Menu Screen

3.35.1 Accessing Inventory

1. On the blue menu toolbar, select **Operations.**
2. Select **Inventory** to access the menu.

3.36 Inquiry

The Inquiry function enables you to view inventory based upon your selected criteria.

3.36.1 Viewing Allocation Inventory

1. Select **Inventory** from the Operations menu.
2. Select **Inquiry.**

Inventory Inquiry

Inventory Inquiry Criteria

Inventory Type:	Allocation Inventory ∨
Commodity:	All Commodities ∨
Warehouse:	State Distribution Center ∨
Program Year:	2016 - 2017 ∨
Program:	All Programs ∨
Sort By:	⦿ Item Number ◯ Commodity Description

< Back   Show Inventory

Figure 135: Inventory Inquiry Search Screen (Allocation Inventory)

3. Select **Allocation Inventory** as the Inventory type.

4. Enter any additional **criteria.** Multiple parameters may be selected.

5. Select **Show Inventory** to access the Allocation Inventory list.

Figure 136: Inventory Inquiry – Allocation Inventory Screen

3.36.2 Viewing On Hand Inventory

1. Select **Inventory** from the Operations menu.

2. Select **Inquiry.**

Figure 137: Inventory Inquiry Search Screen (On Hand Inventory)

3. Select **On Hand Inventory** as the Inventory type.

4. Enter any additional criteria. Multiple parameters may be selected.

5. Select **Show Inventory** to access the Allocation Inventory list.

6. Select the applicable **Inbound link** to display additional details.

Figure 138: Inventory Inquiry – On Hand Inventory Screen (Partial)

3.38 Adjustments

The Adjustments function allows adjustments in unallocated and surplus inventory due to inventory overages, shortages, or recalls in inventory for a specific commodity. Also new inventory amounts can be added through the Adjustments function.

3.38.1 Making Inventory Adjustments

1. Select **Inventory** from the Operations menu.
2. Select **Adjustments.**
3. Use any or all of the criteria below to **filter inventory.**

Figure 139: Inventory Adjustment – Inventory Information Screen

4. Select **Show Inventory.**

Figure 140: Inventory Adjustment – Allocation Inventory Screen

5. Select **link** for Unallocated or Surplus inventory to adjust.
6. Enter **Adjustment Amount.**
7. Select **Lot Number.**
8. Enter any **comments.**
9. Select **Submit**.

Figure 141: Inventory Adjustment – Allocation Inventory Screen

3.38.2 Adding New Inventory

1. Select **Inventory** from the Operations menu.
2. Select **Adjustments.**
3. Use any or all of the criteria below to filter inventory.
4. Select **Show Inventory.**
5. Select **Program** from the drop-down list.
6. Select **Program Year** from the drop-down list.
7. Select **Commodity Type** from the drop-down list.
8. Select **Inventory Level** from the drop-down list.
9. Enter **Amount.**
10. Select **Lot Number.**
11. Enter **Order Number.**
12. Enter **Received Date.**
13. Enter **Pack Date.**
14. Enter any **Comments.**
15. Select **Submit.**

Figure 142: Inventory Adjustment – Add New Inventory Screen

3.39 Transfer

The Transfer function allows unallocated and surplus inventory to be transferred between Warehouses, Programs, and Program Years. The Inventory Type (Unallocated or Surplus) may be changed as well.

3.39.1 Transfer Inventory

1. Select **Inventory** from the Operations menu.
2. Select **Transfer.**

Figure 143: Inventory Transfer Screen

3. Use any or all of the criteria below to filter inventory.
4. Select **Show Inventory**.

Figure 144: Inventory Transfer – Allocation Inventory Screen

5. Select **link for** Unallocated, Surplus or Held inventory.
6. Select the **Warehouse** from the "To" column drop-down list.
7. Select the **Year** from the "To" column drop-down list.
8. Select the **Program** from the "To" column drop-down list.
9. Select the **Inventory Level** from the "To" column drop-down list.
10. Enter the **Quantity** in the "To" column textbox.
11. Enter any **comments.**
12. Select **Submit.**

3.39.2 Rollover Inventory

1. Select **Inventory** from the Operations menu.
2. Select **Transfer.**

Figure 145: Inventory Transfer Screen

3. Use any or all of the criteria below to filter inventory.
4. Select **Rollover Inventory**.

Figure 146: Inventory Transfer – Allocation Inventory Screen

5. Complete the **Rollover Information section**, as necessary.
6. Enter any **comments.**
7. Select **Submit.**

3.40 Inbound Shipments

The Inbound Shipments component provides tracking capability for USDA orders received into the state's warehouse. In addition, new inventory received is assigned to the different program outlets.

There are two steps in the ordering and receiving of commodities from the USDA:

1. **Entry** - State personnel enters the new USDA order for each Warehouse.

2. **Receiving** - Warehouse personnel receive the order and update the order record to indicate a status of received.

The following table describes the features available from the Inbound Shipments menu:

Item	Description
Order Food	• Enables the user to create and track Inbound Shipments
Receive Orders	• Enables the user to receive **Inbound Shipments**
WBSCM Import/Export	• Enables the user to import/export orders and updates to/from WBSCM

Figure 147: Inbound Shipments Menu Screen

3.40.1 Accessing Inbound Shipments

1. On the blue menu toolbar, select **Operations.**
2. Select **Inbound Shipments** to access the menu.

3.41 Order Food

The Order Food function enables you to view, modify or create an Inbound Shipment.

3.41.1 Creating a New Standard USDA – WBSCM Order

1. Select **Inbound Shipments** from the Operations menu.
2. Select **Order Food.**
3. Select **New Order.**

Figure 148: New Inbound Shipments Menu Screen

4. Select the applicable **Inbound Shipment** criteria in the Order Information section, including selecting **Standard USDA Order – WBSCM** as the Order Type.
5. Select **Continue >>.**
6. Use the **"+"** signs to expand the **Group/Item Description** sections to navigate to a specific item.
7. Select the desired **Requested Ship Date.**

Figure 149: New Inbound Shipment Screen

8. Complete the **New Inbound Shipment Form**, including the Order Information, Commodity Information, Delivery Information, and Miscellaneous Information sections.

9. Select **Save.**

Figure 150: New Inbound Shipment Screen

3.41.2 Creating a New End Product Shipment

1. Select **Inbound Shipments** from the Operations menu.
2. Select **Order Food.**
3. Select **New Order.**
4. Select the applicable **Inbound Shipment criteria** in the Order Information section, including selecting **End Product Shipment** as the Order Type.
5. Select **Continue >>.**
6. Complete the **New Inbound Shipment screen.**
7. Select **Continue**.
8. Complete the **Inbound Shipment – End Product Distribution screen**.
9. Select **Save.**

Please Note: Selecting the Finished button re-displays the Inbound Shipment screen with the list of selected End Products. From this screen, users can add new end products by selecting the Add End Products button. Users may also view, modify, or delete end products and select Save Changes to save.

3.41.3 Creating a New Farm to School Order

1. Select **Inbound Shipments** from the Operations menu.
2. Select **Order Food.**
3. Select **New Order.**
4. Select the applicable **Inbound Shipment criteria** in the Order Information section, including selecting **Farm to School** as the Order Type.
5. Select **Continue >>.**
6. Complete the **New Inbound Shipment screen.**
7. Select **Save.**

3.41.4 Creating a New Order (Other)

1. Select **Inbound Shipments** from the **Operations menu.**
2. Select **Order Food.**
3. Select **New Order.**
4. Select the applicable **Inbound Shipment criteria** in the Order Information section, including selecting **Other** as the Order Type.
5. Select **Continue >>.**
6. Complete the **New Food Order screen.**
7. Select **Save.**

3.41.5 Viewing or Modifying an Order

1. Select **Inbound Shipments** from the Operations menu.
2. Select **Order Food.**
3. Select the applicable **Inbound Shipments criteria** and select **Display Orders.**

Figure 151: Inbound Shipments - Search Screen

4. Select the applicable **Order # link** to view or modify order details**.**
5. Make any necessary **modifications** and select **Save.**

Figure 152: Inbound Shipments - Detail Screen

3.41.6 Deleting an Order

1. Select **Inbound Shipments** from the Operations menu**.**
2. Select **Order Food.**
3. Select the **Inbound Shipments criteria** and select **Display Orders.**
4. Select the applicable **Order # link** to view or modify order details**.**
5. Select **Delete Order.**
6. Select **Finished.**

3.42 Receive Orders

The Receive Orders function allows the user to receive and document Inbound Shipments.

 Please Note: Inbound shipments are shipments expected into a warehouse. The status Inbound is a shipment that can be pre-allocated prior to a warehouse receiving the actual shipment.

3.42.1 Creating a New Receipt

1. Select **Inbound Shipments** from the Operations menu.
2. Select **Receive Orders.**
3. Use the **search criteria** to search for an Inbound Shipment.

Figure 153: Receiving - Search for Inbound Shipments

4. Select **Display Orders.**
5. Select the **Order # link.**

Figure 154: Receiving – Order Information Screen

6. Select **New Receipt**.
7. Select **Receiving Status** from the drop-down list (Inbound or Received).

Please Note: The Receiving Information that displays is determined by whether Inbound or Received is selected as the Receiving Status. Only Farm to School shipments will have the status changed to Inbound by a State user. The status Received is the only option available to Contracted Warehouses and direct shipping points.

8. Complete the **Inventory Receipt form.**
9. Select **Save.**

Figure 155: Inventory Receipt (Inbound) Screen

Figure 156: Inventory Receipt (Received) Screen

3.42.2 Creating a New Farm to School Receipt

1. Select **Inbound Shipments** from the **Operations menu.**

Please Note: Prior to a contracted warehouse or direct shipping point receiving a Farm to School shipment, a State user will update the receiving status to Inbound.

2. Select **Receive Orders.**
3. Use the **search criteria** to search for an Inbound Shipment.
4. Select **Display Orders.**
5. Select the **Order # link.**

Figure 157: Receiving – Order Information Screen

6. Select **New Receipt**.
7. Select **Inbound** for the Receiving Status.
8. Complete the **Inventory Receipt form**
9. Select **Continue >>.**
10. Complete the **Inbound Receipt – Inventory Allocation screen.**
11. Select **Process Receipt.**

3.42.3 Viewing or Modifying a Receipt

1. Select **Inbound Shipments** from the Operations menu.
2. Select **Receive Orders.**
3. Use the **search criteria** to search for an Inbound Shipment.
4. Select **Display Orders.**
5. Select the **Order # link.**
6. Select **View** or **Modify** for a receipt**.**
7. Make any necessary **modifications.**
8. Select **Save.**

3.42.4 Canceling a Receipt

1. Select **Inbound Shipments** from the Operations menu.
2. Select **Receive Orders.**
3. Use the **search criteria** to search for an Inbound Shipment.
4. Select **Display Orders.**

5. Select the **Order # link.**
6. Select **Cancel** for a receipt**.**
7. Select **Cancel Receipt.**

3.43 WBSCM Import/Export

The WBSCM Import/Export function enables you to import an Excel file containing WBSCM information. Once the information is successfully uploaded, the system creates new Inbound Shipments based upon the file data.

3.43.1 Accessing the WBSCM Import/Export Menu

1. Select **Inbound Shipments** from the Operations menu.
2. Select **WBSCM Import/Export.**

Item	Description
Inbound Shipment Export	Create a WBSCM Order Upload File
Inbound Shipment Export Responses	Import WBSCM Order Upload Responses
Inbound Shipment Import	Import WBSCM Order Information
Forwarding Notices Import	Import WBSCM Order Forwarding Notices
Inbound Shipment Receipt Export	Create a WBSCM Goods Receipt Upload File
Catalog Import	Import WBSCM Catalog
Commodity File Import	Import WBSCM Commodity Profile and Cost Information

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Figure 158: WBSCM Import/Export Menu

3.43.2 Creating a WBSCM Order Upload File

1. Select **Inbound Shipments** from the Operations menu.
2. Select **WBSCM Import/Export.**
3. Select **Inbound Shipment Export**.

Figure 159: Inbound Shipment Export Screen

4. Use the **search criteria** to search for and select an **Inbound Shipment.**
5. Select **Display Orders.**

Figure 160: Inbound Shipment Export Screen

6. Select the **checkbox(es)** for the order(s) you wish to include in the export file.
7. Select **Create Export File**.
8. Select **Display History.**

9. Select **View** to open the file.

Figure 161: Inbound Shipment Export Confirmation Screen

3.43.3 Uploading a WBSCM File

1. Select **Inbound Shipments** from the **Operations menu.**
2. Select **WBSCM Import/Export.**
3. Select one of the following links on the WBSCM menu:
   a. Inbound Shipment Export Responses
   b. Inbound Shipment Import
   c. Forwarding Notices Import
   d. Catalog Import
   e. Commodity File Import
4. Select **Browse** to find the .XML file on the computer.
5. Locate the **file.**
6. Select **Open.**
7. Select **Upload File.** If the file contains any errors, the errors are displayed below the upload section. The uploaded file will display at the top of the page.

Please Note: Some import types may contain additional selection criteria, such as Type of Import, as shown in the following screenshot(s). Select the relevant type of import when applicable.

Figure 162: WBSMC Order Import Screen

Figure 163: WBSMC Catalog Import Screen

3.43.4 Viewing an Uploaded WBSCM File

1. Select **Inbound Shipments** from the **Operations menu.**
2. Select **WBSCM Import/Export.**
3. Select one of the following links on the WBSCM menu:
   a. Inbound Shipment Export Responses
   b. Inbound Shipment Import
   c. Forwarding Notices Import
   d. Catalog Import
   e. Commodity File Import
4. Select the **View** link. The uploaded file displays.

3.43.5 Displaying Import/Export History

1. Select **Inbound Shipments** from the **Operations menu.**
2. Select **WBSCM Import/Export.**
3. Select one of the **following links** on the **WBSCM menu:**
   a. Inbound Shipment Export
   b. Inbound Shipment Export Responses
   c. Inbound Shipment Import
   d. Forwarding Notices Import
   e. Catalog Import
   f. Commodity File Import
4. Select **Display History.**
5. Select the **Log Type** from the drop-down list, if applicable.
6. Select the **date range.**
7. Select **Display History.**
8. Select **View** to open the file.
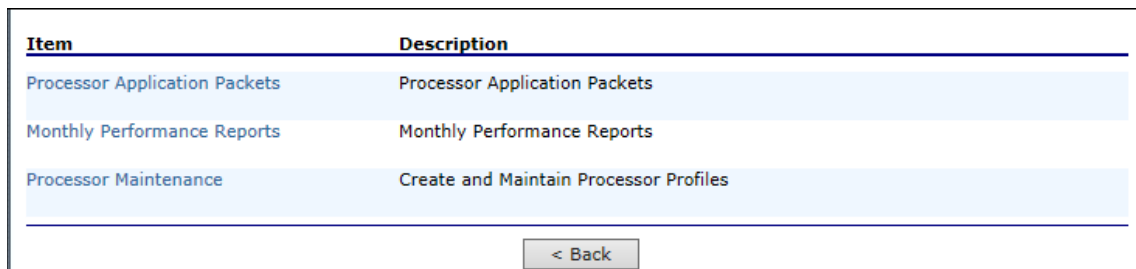
						Import/Export History			
Search Criteria									
Log Type: Catalog Import				From: 11/28/15		To: 12/05/2017			
				< Back	Display History				
Action		**File Name**	**New Records**	**Updated Records**	**Deleted Records**	**Error Records**	**Imported Date Imported By**	**Import Status**	
1. View File		Product_Catalog ... rt 20170315.XML	5262	0	5262	0	03/15/2017 AHODAPP	File imported successfully.	
2. View File		Product_Catalog ... rt 20170313.XML	5262	0	5262	0	03/13/2017 AHODAPP	File imported successfully.	
3. View File		Product_Catalog ... rt 20170303.XML	5262	0	5256	0	03/03/2017 AHODAPP	File imported successfully.	

Figure 164: Import/Export History Screen

3.44 Processes

The Processors menu allows you to manage all processors functions. The following table describes the features available from the Processors menu.

Item	Description
Processor Application Packets	• Enables users to view/modify processor application packets.
Monthly Performance Reports	• Enables users to view monthly performance. • Note: This feature is not currently used in TX-UNPS.
Processor Maintenance	• Enables users to create and maintain processor profiles.

Item	Description
Processor Application Packets	Processor Application Packets
Monthly Performance Reports	Monthly Performance Reports
Processor Maintenance	Create and Maintain Processor Profiles

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Figure 165: Processors Menu Screen

3.44.1 Accessing Processors

1. On the blue menu toolbar, select **Operations.**
2. Select **Processors** to access the menu.

3.45 Processes Application Packets

The Processor Application Packets function enables processors to complete, modify, or revise an application packet in order to be an active processor. State users can review and approve each processor application packet.

3.45.1 Searching for a Processor Application

1. Select **Processors** from the Operations menu.
2. Select **Processor Application Packets.**
3. Use the **search criteria** to search for an application.

4. Select **Search**.
5. Select the **link** of the applicable Processor Application.

Figure 166: Processor Application Screen

3.45.2 Adding an Application

1. Select **Processors** from the Operations menu.
2. Select **Processor Application Packets.**
3. Use the **search criteria** to search for a processor.
4. Select **Add** for a Processor Application

Figure 167: Processor Application Packet - New Screen

5. Complete the **application.**

Figure 168: Processor Application Screen (Partial)

6. Select **Save.**
7. Select **Finish** to return to the Processor Application Packet.

3.45.3 Adding Storage Facilities

1. Access the **Processor Application Packet.**
2. Select **Add** for Storage Facilities.

Figure 169: Processor Application Packet Screen

3. Complete the **Processor Storage Facility form.**

4. Select **Save.**

3.45.4 Viewing or Modifying a Storage Facility

1. Access the **Processor Application Packet.**

2. Select **View** or **Modify** for Storage Facilities.

3. Make any necessary modifications.

4. Select **Save.**

Figure 170: Processor Application Packet Screen

3.45.5 Viewing or Modifying a Checklist

1. Access the **Processor Application Packet.**
2. Select **View or Modify** for the Checklist.
3. Select the **checkbox** for the submitted checklist item.

Processor Application Checklist

Baily International, Inc.
Agreement Number: TX-065

Required Forms/Documents to send to TDA	Document Submitted to TDA	Date Submitted to TDA	Document on File w/ TDA	Status	Status Date	Last Updated By
State Participation Agreement (SPA)	☐		☐	Pending Approval ∨	10/03/2016	
H2048 Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion – Lower Tier Covered Transactions	☐		☐	Pending Approval ∨	10/03/2016	
H2049 Certification Regarding Lobbying	☐		☐	Pending Approval ∨	10/03/2016	
Certification Regarding Drug-Free Workplace (Grants) Alternative 1 – For Grantees Other Than Individuals	☐		☐	Pending Approval ∨	10/03/2016	
Summary End Product Data Schedule	☐		☐	Pending Approval ∨	10/03/2016	
Certificate of Authority	☐		☐	Pending Approval ∨	10/03/2016	
Nondisclosure Statement	☐		☐	Pending Approval ∨	10/03/2016	
Child Support Certification	☐		☐	Pending Approval ∨	10/03/2016	
FNS 7 or List of Delivery Destinations	☐		☐	Pending Approval ∨	10/03/2016	

Save   Cancel

Figure 171: Processor Application Checklist Screen

Please Note: When a checkbox is selected, the Date Submitted to IDE populates with the current date. This date can be modified manually within the textbox.

4. Select **Save.**

3.45.6 Viewing or Modifying a Donated Food to be Processed

1. Access the **Processor Application Packet.**
2. Select **View or Modify** for the Donated Foods Processed.
3. Enter the **commodity name** in the textbox.
4. Select **Search.**

Please Note: Leaving the Commodity textbox blank and selecting the Search button displays a list of all possible commodities.

Figure 172: Donated Foods Processed Screen (Partial)

5. Select **Add** for a specific commodity.
6. Repeat **Steps 3-4** until all commodities have been added.
7. Select **Done.**

3.45.7 Removing a Donated Food to be Processed

1. Access the **Processor Application Packet.**
2. Select **Modify** for the Donated Foods Processed.
3. Select **Remove** for a chosen commodity.
4. Click **Done.**

3.45.8 Creating a New Application Note
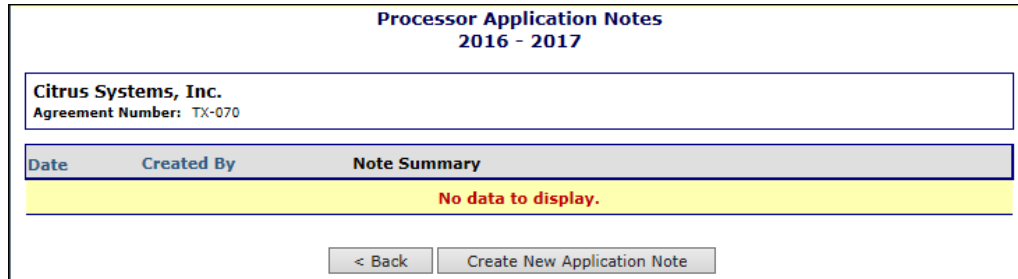
Please Note: Notes are visible only to authorized State users.

1. Access the **Processor Application Packet.**
2. Select **Modify** for the Notes.
3. Select **Create New Application Note**.
4. Enter **note information.**
5. Select **Save.**

3.45.9 Viewing or Modifying Notes

1. Access the **Processor Application Packet.**
2. Select **View** or **Modify** for Notes.
3. Select the **link** for the note to view or modify.
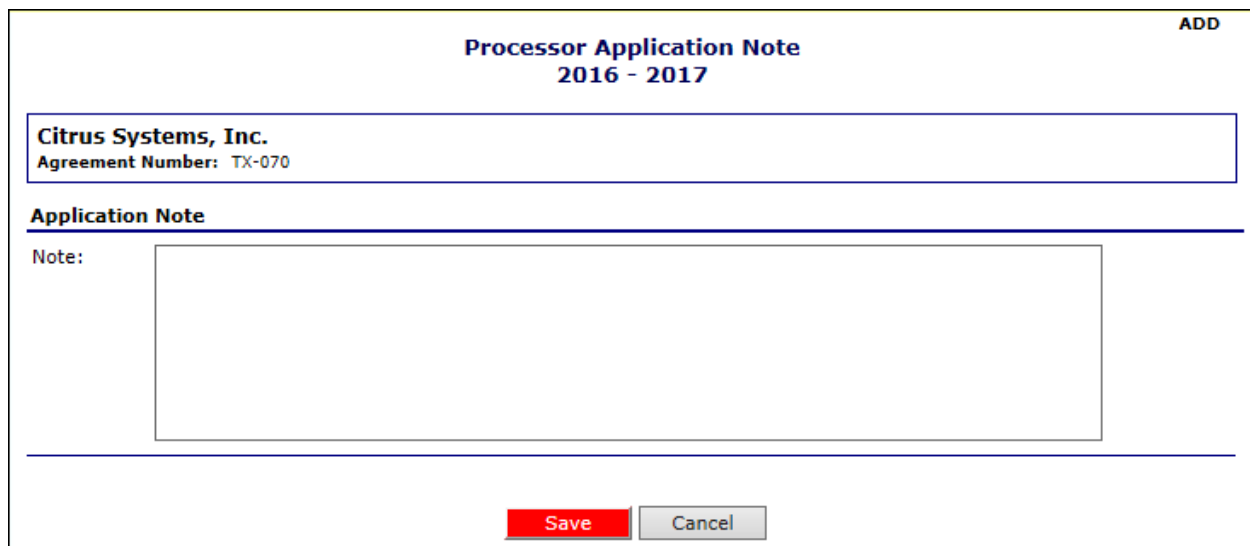
Figure 173: Processor Application Notes Screen

6. Make any necessary **modifications.**
7. Select **Save.**

Figure 174: Processor Application Notes – Modify Screen

3.45.10 Submitting an Application

Once an application is complete, the Submit for Approval button is enabled.

1. Access the **Processor Application Packet.**
2. Select **Submit for Approval.**

3.45.11 Withdrawing an Application

A Processor Application Packet may be withdrawn once the packet has been submitted. Once withdrawn, all packet information is retained within the site. The packet will need to be resubmitted by the user for approval.

1. Access the **Processor Application Packet.**
2. Select **Withdraw Packet.**

3.45.12 Closing an Agreement (State Use Only)

1. Access the **Processor Application Packet.**
2. Select **Close Agreement.**

3.45.13 Returning Packet for Correction (State Use Only)

1. Access the **Processor Application Packet.**
2. Select **Return for Correction**.

3.45.14 Denying a Packet (State Use Only)

1. Access the **Processor Application Packet.**
2. Select **Deny.**

3.45.15 Approving a Processor Application Packet (State Use Only)

Once a Processor Application Packet is submitted for approval, an authorized user must review the packet contents. First, individual items in the Packet, such as the Processor Application, must be approved. Then, the Application Packet is approved by selecting the **Approve** button.

1. Access the **Processor Application Packet.**
2. Select **Admin** for the Processor Application.
3. Select the **Application Status** from the drop-down list.
4. Select **Save.**
5. Select **Finish.**
6. Select **Admin** for Storage Facilities.
7. Select the **Application Status** from the drop-down list.
8. Select **Save.**
9. Select **Finish.**
10. Repeat **Steps 6-9** until all Storage Facilities have been reviewed.
11. Select **Admin** for the **Checklist.**

12. Select the **checkbox** for each document on file.

13. Select the **Status** from the drop-down list.

14. Select **Save**.

15. Select **Finish.**

16. Select **Approve** on the **Processor Application Packet screen**.

3.46 Monthly Performance Reports

Please Note: At this time, Monthly Performance Reports are not used within TX-UNPS.

3.47 Processor Maintenance

The Processor Maintenance function enables the creation of a new processor, view select commodities to process, and view, modify, or delete an existing processor.

3.47.1 Adding a New Processor

1. Select **Processors** from the Operations menu**.**

2. Select **Processor Maintenance.**

3. Select **Add New Processor.**

4. Complete the **Processor Information form.**

5. Select **Save.**

Figure 175: Processor Information Screen

3.47.2 Viewing or Modifying Processor Information

1. Select **Processors** from the Operations menu.
2. Select **Processor Maintenance.**
3. Search for a **processor.**
4. Select **View** or **Modify** for a desired processor.
5. Make any necessary modifications on the **Processor Information form.**
6. Select **Save.**

3.47.3 Deleting a Processor

1. Select **Processors** from the Operations menu.
2. Select **Processor Maintenance.**
3. Search for a **processor.**
4. Select **Delete** for the applicable processor.
5. Select **Delete Processor.**

Figure 176: Processor Information – Delete Screen

3.47.4 Adding a Commodity to be Processed

1. Select **Processors** from the Operations menu.
2. Select **Processor Maintenance.**
3. Search for a processor**.**
4. Select **Foods Processed** link for the applicable processor.
5. Enter a **full** or **partial commodity name** in the Commodity field.
6. Select **Search.**
7. Select **Add** for the applicable commodity.
8. Repeat **Steps 5-7** until all commodities have been added**.**
9. Select **Done.**

Figure 177: Donated Foods Processed Screen

3.47.5 Removing a Commodity from a Processor

1. Select **Processors** from the Operations menu.
2. Select **Processor Maintenance.**
3. Search for a **processor.**
4. Select **Foods Processed** link for the desired processor.
5. Select **Remove** for the desired commodity.
6. Select **Done.**

3.48 Invoicing

The Invoicing menu is used to create and adjust invoices for all orders that have been shipped to the Contracting Entities. In addition to creating invoices that can be viewed and printed by Contracting Entities for remittance, the system allows the State to export invoice information to the State's accounting system. The following table describes the features available from the Invoicing menu:

Item	Description
Process Invoices – Orders	• Enables users to process invoices for Contracting Entity orders.
Manual Invoice Adjustments	• Enables users to create manual invoice adjustments.
FDP Invoice Listing	• Enables users to track invoices and outstanding receivables.

Item	Description
Process Invoices - Orders	Process Invoices for Contracting Entity Orders
Manual Invoice Adjustments	Create Manual Invoice Adjustments
FDP Invoice Listing	Track Invoices and Outstanding Receivables
Payments Received	Create and view Payment Receipts for FDP Invoices
Post Invoice Receipts	Post Invoice Receipts by Receipt Type

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Figure 178: Invoicing Menu

3.48.1 Accessing Invoicing

1. On the blue menu toolbar, select **Operations.**
2. Select **Invoicing** to access the menu.

3.49 Process Invoices - Orders

The Process Invoices – Orders function enables you to create invoice records for all Contracting Entity Orders entered and tracked on the system. Shipping and handling fees are charged for Contracting Entity orders that have been shipped from distribution warehouses to Contracting Entities. Administrative fees are charged for orders that are shipped from the USDA directly to a processor on behalf of a Contracting Entity.

3.49.1 Creating a New Invoice Batch

1. Select **Invoicing** from the Operations menu.
2. Select **Process Invoices - Orders.**

Process Invoices - Orders

Program Year	# of Batches	Invoice Amounts
2017-2018	6	$2,524.70
2016-2017	1500	$1,671,426.34
2015-2016	706	$1,953,222.15
2014-2015	857	$2,717,405.29
2013-2014	895	$3,278,191.92
2012-2013	994	$2,939,484.47
2011-2012	0	$0.00

< Back   Create New Invoice Batch

Figure 179: Process Invoices - Orders Screen

3. Select **Create New Invoice Batch.**
4. Select **Order Criteria** including:
    a. Program Year
    b. Program
    c. Order Type (required)
    d. Orders Shipped On or Before
5. Enter your **Requester Information.**
6. Select a **warehouse**, if necessary.
7. Select **Display Orders.**

ADD

Process Invoices - Orders

Order Criteria

Program Year:	2016 - 2017
Program:	NSLP
Order Type:	
Orders Shipped on or Before:	12/05/2017

Requester Information

Requester Name:	Developer B. CCG
Unit Title:	
Telephone:	623-209-1700
Classification/Title:	Developer

Warehouse

Warehouse:	All Warehouses

Display Orders   Cancel

Figure 180: Process Invoices - Orders – Create a New Invoice Batch Screen

8. Select the **checkboxes** to approve for the batch.

Please Note: Select **any link** in a row to display the Order Information details.

9. Select **Process Batch**.
10. Select **Post Batch** to post.

Figure 181: Process Invoices - Orders – Create a New Invoice Batch Screen

3.49.2 Processing or Posting a Batch (Orders)

1. Select **Invoicing** from the Operations menu.
2. Select **Process Invoices - Orders.**
3. Select a **link** for the applicable Program Year.

Batch Number	Process Date	Order Type	Shipped Date	Posted	Invoice Amount
3597	09/07/2016	All Types	09/09/2016	Y	$145.50
3598	09/07/2016	All Types	09/09/2016	Y	$162.35
3599	09/07/2016	All Types	09/09/2016	Y	$197.16

Figure 182: Process Invoices - Orders Screen

4. Select any **link** in the row for a desired Batch Number.
5. Select the **checkbox** for **'Approve to Batch'** for each invoice.

Please Note: Select the "Click here to check – uncheck all" checkbox to select or de-select all invoices listed below.

6. Select **Process Batch** or select **Post Batch.**

Process Invoices - Orders
Select Orders for Invoice Batch # 3600

Batch Number	FDP Program	Process Date	Orders shipped on or before
3600	NSLP	09/08/2016	09/08/2016

Requester Name: Ana C. Garcia   **Warehouse:** HOUSTON FOOD BANK
Unit Title:
Telephone: 8323699215
Classification/Title: NSLP Representative

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CE ID	Contracting Entity Name	Order Number	Shipped Date	Invoice Amount
00483	ALIEF MONTESSORI COMMUNITY SCHOOL	99201	09/06/2016	$107.25
00145	CALHOUN CO ISD	98839	09/05/2016	$803.40
00117	COLUMBIA-BRAZORIA ISD	98187	09/06/2016	$293.44

Figure 183: Process Invoices - Orders Screen (Partial)

3.50 Manual Invoice Adjustments

The Manual Invoice Adjustments function enables you to view existing Manual Invoice Adjustments based on selected criteria or to create a new Manual Invoice Adjustment for a selected Contracting Entity. If the adjustment has not been invoiced, the Manual Invoice Adjustment form will display in Modify mode. If the adjustment has been invoiced, the Manual Invoice Adjustment form will display in View mode.

3.50.1 Viewing or Modifying a Manual Invoice Adjustment

1. Select **Invoicing** from the Operations menu.
2. Select **Manual Invoice Adjustments.**
3. Enter **Adjustment Criteria** into the respective fields.
4. Select **Display Adjustments** to filter results.

Figure 184: Manual Invoice Adjustments Screen

3.50.2 Creating a New Manual Invoice Adjustment

1. Select **Invoices** from the Operations menu.
2. Select **Manual Invoice Adjustments.**
3. Select **New Adjustment.**
4. Complete the **Manual Invoice Adjustment form.**
5. Select **Save**.

Figure 185: Manual Invoice Adjustments Screen

3.50.3 Deleting Manual Invoice Adjustment

1. Select **Invoices** from the Operations menu.
2. Select **Manual Invoice Adjustments.**
3. Search for and select a **manual adjustment.**
4. Select **Delete**.
5. Select **Delete** to confirm.

3.51 FDP Invoice Listing

The FDP Invoice Listing function enables you to track invoices and outstanding receivables. By selecting a program year and type, you can view direct ship, warehouse, and/or extended storage invoices. Users can select invoices to print or can view the invoice detail and status.

3.51.1 Viewing or Printing an Invoice Listing

1. Select **Invoices** from the Operations menu.
2. Select **FDP Invoice Listing.**

FDP Invoice Listing

Food Distribution Program (FDP)

Program Year	Program	Batches	Invoiced	Balance
2017-2018	CSFP	0	$0.00	$0.00
2017-2018	Disaster Relief	0	$0.00	$0.00
2017-2018	FMNP	0	$0.00	$0.00
2017-2018	NSLP	5	$2,524.70	$2,524.70

Figure 186: FDP Invoice Listing Screen (Partial)

3. Select the applicable **Program Year/Program link.**
4. Select/De-select any applicable **checkbox** to filter the **Invoice Types** displaying or select **Display All Invoices** to remove any filter.
5. Select any **link** for the Invoice to view details.

Figure 187: FDP Invoice Listing – by Program Screen

Figure 188: FDP Invoice Listing – by Program – Details Screen

6. Select the **Invoice Number link**.
7. Select **Print Invoice** to print.

3.51.2 Viewing or Modifying Invoice Status

1. Select **Invoices** from the Operations menu.
2. Select **FDP Invoice Listing.**
3. Select the applicable **Program Year/Program link.**
4. Select/De-select any desired **checkbox** to filter the Invoice Types displaying or select **Display All Invoices** to remove any filter.
5. Select any **link** for the Invoice to view details.
6. Select the **Status link.**

7. Select the **Status** from the drop-down link.

Invoice Status

Contracting Entity: IDEA Academy Austin - FDP
CE ID: 05423

Invoice Information

Program Year:	2017 - 2018	**Invoice No.:**	18 036263
Program:	NSLP	**Invoice Date:**	07/21/2017
Batch No:	6953	**Invoice Type:**	Orders - Warehouse
		Invoice Amount:	$1,713.50

Requester Information

Requester Name: Developer B. CCG
Unit Title:
Telephone: (623) 209-1700
Classification/Title: Developer

Invoice Status

Status: Invoiced
Paid Date:
Comment:

Created By: Developer   On: 07/21/2017

Cancel   Save

Figure 189: Invoice Status Screen

8. Enter the **Paid Date.**
9. Enter any **comments.**
10. Select **Save**.

3.52 FDP Maintenance

The FDP Maintenance menu allows you to manage all FDP maintenance functions.

Figure 190: FDP Maintenance Menu Screen

3.52.1 Accessing FDP Maintenance

1. On the blue menu toolbar, select **Operations.**
2. Select **FDP Maintenance** to access the menu.

3.53 Contracting Entity Email Notifications

The Agency Email Notifications function allows the user to create and send email notifications. Email Groups can be used to send emails to specific groups of people.

3.53.1 Generating Agency Email Notifications

1. Select **FDP Maintenance.**
2. Select **Agency Email Notifications.**
3. Select the **checkboxes** that meet the requirements to generate an email notification.
4. Click **Continue >>.**

Figure 191: Email Notifications Screen

5. On the following page, verify that the email recipients are correct.
6. Click **Continue >>.**

Figure 192: Agency Email Notifications

7. Complete the **Subject field**.
8. Complete the **Email Text field.**
9. Attach any **files.**
10. Click the **Send Notifications button.**

Agency Email Notifications

Email Distribution

Subject:

E-mail Text:

< Back   Send Notifications
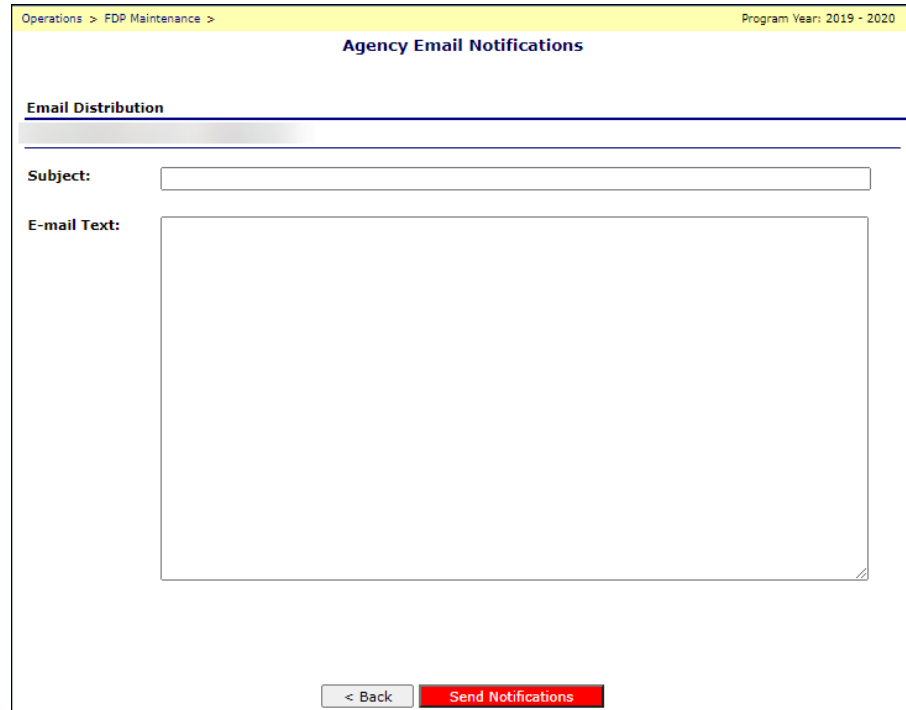
Figure 193: Agency Email Screen

3.54 Contracting Entity Order Lockout

The Contracting Entity Order Lockout function enables the user to lock Contracting Entities out of Allocation or Surplus orders. Allocation groups can be locked out for a specific program or only locked out of chosen groups. In addition, modifications can be made to the lockout message that will display for a Contracting Entity that has been locked out. Presently, Contracting Entities cannot be unlocked for Allocation and Surplus orders simultaneously.

3.54.1 Locking or Unlocking Contracting Entities from Orders

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Contracting Entity Order Lockout.**
3. For the applicable program, select **Unlocked checkbox(s)** for all chosen Contracting Entities to **Lock** Contracting Entities out of Allocation or Surplus Orders or select the **Locked checkbox(es)** for all applicable Contracting Entities to Unlock Contracting Entities out of Allocation or Surplus Orders.

Please Note: The user can select the **"Check here to lock/unlock all" checkbox** once to mark all checkboxes below or de-select the checkbox to un-select all checkboxes below.

4. Select **Save.**
5. Click **Finished.**

Contracting Entity Order Lockout

☐ Check to lock all / Uncheck to unlock all
NSLP

Allocation Group	Allocation Orders ☐ Check here to Lock/Unlock all	Surplus Orders ☐ Check here to Lock/Unlock all
CBBC Dallas	☐ UNLOCKED	☐ UNLOCKED
Central Texas Food Bank	☐ UNLOCKED	☐ UNLOCKED
Dees Food Service	☐ UNLOCKED	☐ UNLOCKED
Direct Ship Schools	☐ UNLOCKED	☐ UNLOCKED
FMNP/SFMNP	☐ UNLOCKED	☐ UNLOCKED
Food Bank Group	☐ UNLOCKED	☐ UNLOCKED
Food Bank RGV	☐ UNLOCKED	☐ UNLOCKED
Houston Food Bank	☐ UNLOCKED	☐ UNLOCKED
San Antonio Food Bank	☐ UNLOCKED	☐ UNLOCKED
Tejas Coop-(LABATT)	☐ UNLOCKED	☐ UNLOCKED
US Food Service	☐ UNLOCKED	☐ UNLOCKED

Allocation Orders Lock Out Message:
Allocation inventory is temporarily locked.

Surplus Orders Lock Out Message:
Surplus inventory is temporarily locked.

Figure 194: Contracting Entity Order Lockout Screen (Partial)

3.54.2 Changing Lock Out Messages

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Contracting Entity Order Lockout.**
3. For the applicable program, enter a **lockout message** in the "Allocation Orders Lock Out Message" or "Surplus Orders Lock Out Message" textbox.
4. Select **Save** once all changes have been made.
5. Click **Finished.**

3.55 Allocation Groups

The Allocation Groups function enables you to modify an allocation group's name, status, and number of open orders allowed. Here, you can also assign and manage delivery periods.

Allocation Groups

Group	Open Orders Allowed	Action		
CBBC Dallas	4	Modify Group	Assign Delivery Periods	Manage Delivery Periods
Central Texas Food Bank	4	Modify Group	Assign Delivery Periods	Manage Delivery Periods

Figure 195: Allocation Groups Screen

3.55.1 Creating a New Allocation Group

1. Select **FDP Maintenance** from the **Operations menu.**
2. Select **Allocation Groups.**
3. Select **New Allocation Group.**
4. Enter the **group's description.**
5. Enter the **number of open orders** allowed.

Important

Please Note: The number of open orders allowed, controls the number of Delivery Periods that will be available to a Contracting Entity during an ordering period. For example, one Allocation Group may be allowed 1 delivery per month while another may be allowed 4.

6. Select the **status** from the drop-down list.
7. Select **Save.**
8. Click **Finished.**

ADD

Allocation Group Information

Description:
Number of Open Orders Allowed:
Status: Active

Save   Cancel

Figure 196: Allocation Group Information – Add Screen

3.55.2 Modifying an Allocation Group

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Allocation Groups.**
3. Select **Modify Group** for the applicable group**.**
4. Modify any **information.**
5. Select **Save.**
6. Click **Finished.**

Allocation Group Information

Description:	Central Texas Food Bank
Number of Open Orders Allowed:	4
Status:	Active

Save   Cancel   Delete

Figure 197: Allocation Group Information - Modify Screen

3.55.3 Deleting an Allocation Group

1. Select **Allocation Groups** from the **Maintenance menu**.
2. Select **Modify Group** for the applicable group.
3. Select **Delete** to receive a confirmation.
4. Click **Finished.**

3.55.4 Assigning a Delivery Period

Please Note: Delivery Periods are not used within TX-UNPS at this time.

3.55.5 Managing Delivery Periods

Please Note: Delivery Periods are not used within TX-UNPS at this time.

3.56 Carriers

The Carriers function enables the user to create a new carrier, modify an existing carrier, or delete a carrier. Carriers must be created for contracted warehouses and direct ship schools.

3.56.1 Creating a New Carrier

1. Select **FDP Maintenance** from the **Operations menu.**
2. Select **Carriers.**

Carrier Maintenance

Carriers

Name	Phone	Action
ALDINE ISD - LABATT WHSE	(713) 681-3819	Modify Delete
ALDINE ISD WHSE-SYSCO	(281) 985-6449	Modify Delete
AUSTIN ISD WHSE	(512) 414-0247	Modify Delete

Figure 198: Carriers Maintenance Screen

3. Select **New Carrier.**
4. Enter all **carrier information.**
5. Select **Save.**
6. Select **Finished.**

Carrier Information

Carrier Information

Carrier Name:
Carrier Contact Name:
Phone: Extension:
Fax:
Address 1:
Address 2:
City:
State: TX   Zip+4:
FEIN:
Email:

Cancel   Save

Figure 199: Carrier Information - New Screen

3.56.2 Modifying a Carrier

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Carriers.**
3. Select **Modify** for the applicable carrier.
4. Make any necessary **modifications.**
5. Select **Save.**

3.56.3 Deleting a Carrier

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Carriers.**
3. Select **Delete** for the applicable carrier.
4. Select **Delete Carrier.**
5. Click **Finished.**

3.57 Commodities

The Commodities function enables the user to add a new commodity, modify, or delete existing commodities, and add cost details for a commodity. A specific commodity may be chosen using the Commodities Search function.

3.57.1 Searching for a Commodity

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Commodities.**
3. Enter any of the **search criteria.**
4. Select **Search**.

Figure 200: Commodities Search/Select Screen

3.57.2 Adding a New Commodity

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Commodities.**
3. Select **Add Commodity**
4. Complete the **Commodity Profile screen.**
5. Select **Save**.
6. Click **Finished.**

Figure 201: Commodity Profile Screen

3.57.3 Adding a Commodity

Please Note: Commodity Costs must be entered before the commodity can be used in a survey or allocated. The initial cost for a program year will be an estimated cost which will be updated.

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Commodities.**
3. Select **Modify** for the applicable commodity.
4. Make any necessary **modifications.**
5. Select **Save.**
6. Click **Finished.**

3.57.4 Deleting a New Commodity

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Commodities.**
3. Select **Delete** for the applicable commodity.
4. Select **Delete Commodity** to receive a confirmation.
5. Click **Finished.**

3.57.5 Viewing or Modifying Commodity Cost Information

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Commodities** to access the Commodities Search/Select screen.
3. Select **Cost** for the applicable commodity.

Figure 202: Commodity Search Screen

4. Select a **year.**

Figure 203: Commodity Costs Screen

5. View or make any necessary **modifications.**

Please Note: TDA is currently not applying administrative fees.

6. Select **Save** to receive a confirmation.
7. Click **Finished.**

Figure 204: Commodity Costs Screen

3.58 Data Import/Export

The Data Import/Export function enables the user to import end product commodity information, processing surveys, or view imported/exported files and history.

3.58.1 Importing End Product Information

1. Select **Data Import/Export** from the **FDP Maintenance menu.**
2. Select **End Product Information Import.**
3. Select **Browse...**
4. Locate the **.XLS file** on your computer and select **Open**.
5. Select **Import End Product Information.**

End Product Information Import

	Action	File Name	New Records	Updated Records	Deleted Records	Error Records	Imported Date Imported By	Import Status
1.	View File	634751818528271 ... of 6-13-12.xls	0	34	0	17	06/13/2012 MFLORES	File imported successfully with errors.
2.	View File	634751806127185 ... of 6-13-12.xls	34	0	0	17	06/13/2012 MFLORES	File imported successfully with errors.

Program Year: 2017 - 2018 ▾

To import a file:
1. Click on the "Browse" button to find the .XLS file on your computer.
2. Once you locate the file, click the "Open" button.
3. When finished with the above steps, click "Import End Product Information".

* The import may take a few minutes. Thank you for your patience.

[Browse...]

[< Back] [Import End Product Information] [Display History]

Figure 205: End Product Information Import Screen

6. Select **Browse…**
7. Locate the **.XLS file** on your computer and select **Open**.
8. Select **Import End Product Information.**

3.58.2 Viewing Imported End Product Information

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Data Import/Export.**
3. Select **End Product Information Import.**
4. Select **View** for the applicable file.
5. Select **Open** to view the file**.**

3.58.3 Processing Survey Import

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Data Import/Export**.
3. Select **Processing Survey Import**
4. Using the drop-down boxes select the **Program Year**, the **Program**, and the **Survey.**
5. To Import a file, select the **Choose File button**.
6. Locate the file on your computer, select the **Open button.**
7. Select **Import Processing Survey File button.**
8. Select **View** for the file.

3.58.4 Viewing Data Import/Export History

1. Select **Data Import/Export** from the FDP Maintenance menu.
2. Select **Data Import/Export History.**
3. Select the applicable **Log Type** from the drop-down list**.**
4. Select the **Date Range.**
5. Select **Display History.**
6. Select **View** for the file.

3.59 Delivery Route Maintenance

The Delivery Route Maintenance function enables the user to add, view, modify, or delete delivery routes.

3.59.1 Adding a Delivery Route

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Delivery Route Maintenance.**
3. Select a **Program.**
4. Select **Display Routes.**

Delivery Route Maintenance

Program: NSLP

Delivery Route	Action		
1st & 3rd Friday	Schedule	Stops	Delete
1st & 3rd Monday	Schedule	Stops	Delete
1st & 3rd Thursday	Schedule	Stops	Delete
1st & 3rd Thursday & Friday	Schedule	Stops	Delete

Figure 206: Delivery Route Maintenance Screen

5. Select **Add Delivery Route**.

6. Enter the **Delivery Route Name.**

7. Select **Save.**

8. Click **Finished.**

3.59.2 Modifying a Delivery Route Name

1. Select **FDP Maintenance** from the Operations menu.

2. Select **Delivery Route Maintenance.**

3. Select the applicable **Delivery Route.**

4. Modify the **name.**

5. Select **Save.**

6. Click **Finished.**

3.59.3 Entering a Delivery Route Schedule

1. Select **FDP Maintenance** from the Operations menu**.**

2. Select **Delivery Route Maintenance.**

3. Select the **Schedule link** for the appropriate route.

Figure 207: Delivery Route Schedule Screen (Partial)

4. Click on a **day** to select/unselect a Delivery Date. If an Open order exists for a delivery date, the date cannot be unselected.
5. Select **Save Changes.**
6. Click **Finished.**

3.59.4 Adding/Removing Delivery Stops

6. Select **FDP Maintenance** from the Operations menu.
7. Select **Delivery Route Maintenance.**
8. Select the **Stops link** for the applicable Delivery Route.

Delivery Route Maintenance	
Program: NSLP	
Assigned Delivery Stops	
Delivery Stop	
1st & 3rd Friday	Remove Stop
Available Delivery Stops	
Delivery Stop Name: [ ] Search	
Delivery Stop	
1st & 3rd Monday	Add Stop
1st & 3rd Thursday	Add Stop
1st & 3rd Thursday & Friday	Add Stop

Figure 208: Delivery Route Maintenance - Stops Screen

9. Select **Add Stop** to add the Delivery Stop to the Delivery Route or select **Remove Stop** to remove the Delivery Stop from the Delivery Route.

Please Note: A user can enter a full or partial Delivery Stop Name in the textbox and select Search to narrow the list of all Delivery Stops.

10. Select **Done.**

3.59.5 Deleting a Delivery Route

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Delivery Route Maintenance.**
3. Select the **Delete link** for the applicable Delivery Route.
4. Select **Delete** to confirm**.**

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3.60 Delivery Stop Maintenance

The Delivery Stop Maintenance function enables the user to add, view, modify, or delete delivery stops.

3.60.1 Adding a Delivery Stop

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Delivery Stop Maintenance.**

Figure 209: Delivery Stop Maintenance Screen

3. Select **Add Delivery Stop**.
4. Enter the **Delivery Stop Name.**
5. Select the **Status.**
6. Select **Save.**
7. Click **Finished.**

3.60.2 Modifying a Delivery Stop Name

1. Select **FDP Maintenance** from the **Operations menu.**
2. Select **Delivery Stop Maintenance.**
3. Select **Modify** for applicable **Delivery Stop.**
4. Make any necessary modifications.
5. Select **Save.**

3.60.3 Deleting a Delivery Stop

1. Select **FDP Maintenance** from the **Operations menu.**
2. Select **Delivery Stop Maintenance.**

3. Select the **Delete link** for the applicable Delivery Stop.

4. Select **Delete** to **confirm.**

5. Click **Finished.**

3.61 FDP Program Years

The FDP Program Years function enables the user to create a new program year, change the beginning and end date for the year, modify the processor packet year information, and change the program year status for Contracting Entities, Processors, and State users.

3.61.1 Creating a New Program Year

1. Select **FDP Maintenance** from the Operations menu.

2. Select **FDP Program Years.**

3. Select **Create New Program Year.**

Operations > FDP Maintenance > FDP Program Years >   Program Year: 2020 - 2021

Food Distribution Program Years

Program Year	Begin Date	End Date	Processor Packet Year	Status		
				Contracting Entity	Processor	State
2021	07/01/2020	06/30/2021	Renewal	Open	Open	Open
2020	07/01/2019	06/30/2020	Renewal	Open	Open	Open
2019	07/01/2018	06/30/2019	Renewal	Open	Open	Open
2018	07/01/2017	06/30/2018	Renewal	Open	Open	Open
2017	07/01/2016	06/30/2017	Renewal	Open	Closed	Open
2016	07/01/2015	06/30/2016	Renewal	Closed	Closed	Open
2015	07/01/2014	06/30/2015	Renewal	Closed	Closed	Open
2014	07/01/2013	06/30/2014	Renewal	Closed	Closed	Open
2013	07/01/2012	06/30/2013	Renewal	Closed	Closed	Open
2012	07/01/2011	06/30/2012	Renewal	Closed	Closed	Open
2011	07/01/2010	06/30/2011	Renewal	Closed	Closed	Closed
2010	07/01/2009	06/30/2010	Renewal	Closed	Closed	Closed
2009	07/01/2008	06/30/2009	Renewal	Closed	Closed	Closed
2008	07/01/2007	06/30/2008	Renewal	Closed	Closed	Closed
2007	07/01/2006	06/30/2007		Closed	Closed	Closed

< Back   Create New Program Year

Figure 230: Food Distribution Program Years Screen

4. Enter the **Begin Date.**

5. Enter the **End Date.**

6. Select **New** or **Renewal** from the Processor Packet Year drop-down list.

7. Select the **status** from Contracting Entity, Processor, and State drop-down lists.

Please Note: If the program year status is marked as "Closed" for a user type (Contracting Entity, Processor, or State), a user will not see any information pertaining to that program year. If the program year status is "Open", users have access to all normal functionality per their security rights.

8. Select **Save.**
9. Click **Finished.**

Figure 231: Food Distribution Program Year Screen

3.61.2 Modifying Program Year Information

1. Select **FDP Maintenance** from the Operations menu.
2. Select **FDP Program Year.**
3. Select the applicable **program year.**
4. Make any necessary modifications to the information.
5. Select **Save.**
6. Click **Finished.**

3.62 Processing Co-op Maintenance

The Processing Co-op Maintenance function enables the user to create a new, modify an existing or delete a processing co-op.

3.62.1 Creating a New Processing Co-op

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Processing Co-op Maintenance.**

Figure 232: Processing Co-op Maintenance Screen

3. Select **New Processing Co-op.**
4. Enter all **carrier information**.
5. Select **Save.**
6. Click **Finished.**

Figure 233: Processing Co-op Maintenance - New Screen

3.62.2 Modifying a Processing Co-op

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Processing Co-op Maintenance**.
3. Select **Modify** for the applicable processing co-op.
4. Make any necessary **modifications.**
5. Select **Save.**
6. Click **Finished.**

3.62.3 Deleting a Processing Co-op

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Processing Co-op Maintenance.**
3. Select **Delete** for the applicable processing co-op.
4. Select **Delete.**
5. Click **Finished.**

3.63 Table Maintenance

The Table Maintenance function enables the user to maintain the tables shown in the following screenshot:

Operations > FDP Maintenance > Table Maintenance >   Program Year: 2020 - 2021

Food Distribution Program Table Maintenance

Item	Description
Commodity Classes	Maintain Commodity Classes
Delivery Fees	Maintain Shipping and Handling Fees
Delivery Periods	Create and Maintain Delivery Periods
FDP State Contacts	Maintain Food Distribution Program State Contracting Entity Contact Information
Surplus Request Percent	Limit the percentage of Surplus Inventory that can be ordered
Survey Types	Maintain Survey Types
System Defaults	Set FDP System Defaults
Percent of Entitlement To Spend	Maintain Entitlement To Spend Percentage by Program and Program Year
Pre-Allocation Maintenance	Set up FDP Pre-Allocation Maintenance

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Figure 234: Table Maintenance Menu

3.63.1 Modifying a Commodity Class

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Table Maintenance.**
3. Select **Commodity Classes.**

Figure 235: Commodity Class Information Screen (Partial)

4. Select **Modify** for the applicable commodity class.

Figure 236: Commodity Class Information

5. Make any necessary **modifications.**
6. Select **Save**.
7. Click **Finished.**

3.63.2 Adding a New Commodity Class

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Table Maintenance.**
3. Select **Commodity Classes.**
4. Select **Add New Commodity Class** button.
5. Enter **Code.**
6. Enter **Description.**
7. Select **Status from dropdown.**
8. Select **Save.**
9. Click **Finished.**

Figure 237: Commodity Class Information

11. Make any necessary **modifications.**

12. Select **Save**.

3.63.3 Adding New Shipping and Handling Delivery Fees

1. Select **FDP Maintenance** from the Operations menu.

2. Select **Table Maintenance.**

3. Select **Delivery Fees.**

4. Select **Modify**.
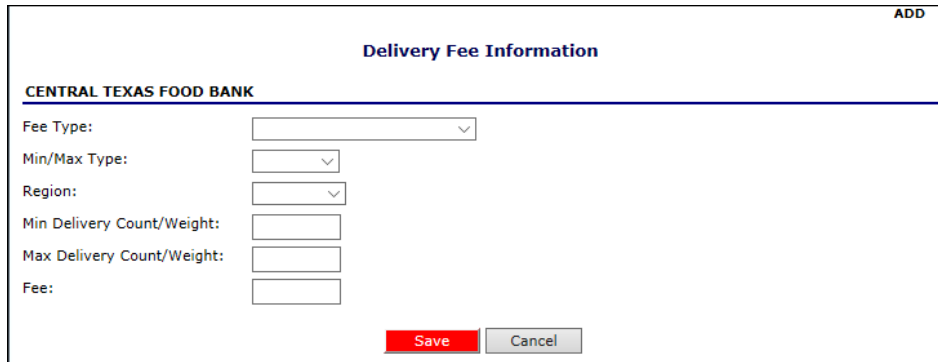
Figure 238: Delivery Fee Maintenance Screen

5. Select **Add New Fee**.

6. Complete all **Delivery Fee Information.**

7. Select **Save.**

8. Click **Finished.**
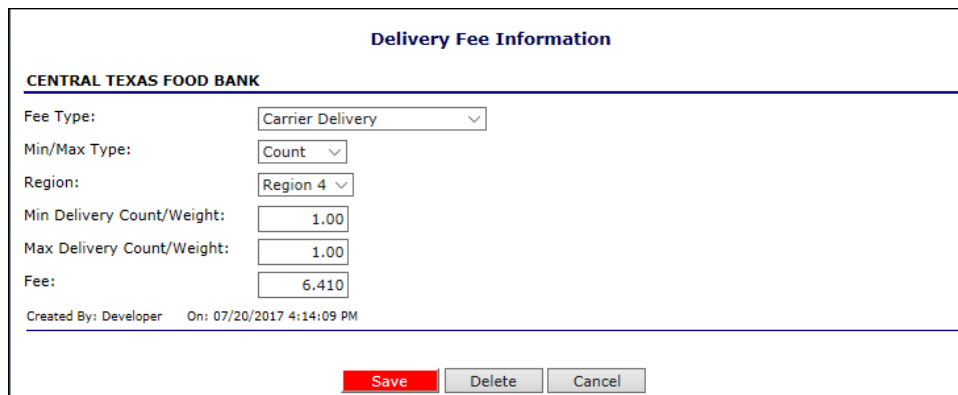
Figure 239: Delivery Fee Information – Add Screen

3.63.4 Viewing or Modifying Shipping and Handling Fees

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Table Maintenance.**
3. Select **Delivery Fees.**
4. Select **Modify**.
5. Select **Fee Type link.**
6. **View** or **modify** any information.
7. Select **Save.**

Figure 240: Delivery Fee Information – Modify/Delete Screen

3.63.5 Deleting a Fee

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Table Maintenance.**
3. Select **Delivery Fees.**
4. Select **Modify**.
5. Select **Fee Type link.**

6. Select **Delete** to receive a confirmation.

7. Click **Finished.**

3.63.6 Adjusting for CPI

1. Select **FDP Maintenance** from the Operations menu.

2. Select **Table Maintenance.**

3. Select **Delivery Fees.**

4. Select **CPI Adjustment**.

5. Enter the **Adjustment %.**

6. Select the **Fee Types** to include in the adjustment.

7. Select **Display New Fees.**

8. Select **Save Changes**.

9. Click **Finished.**

3.63.7 Modifying FDP State Contact Information

1. Select **FDP Maintenance** from the Operations menu.

2. Select **Table Maintenance.**

3. Select **FDP State Contacts.**

Figure 241: Food Distribution Program State Contacts Maintenance Screen

4. Select **Modify** for the applicable contact type.

5. Make any **necessary modifications.**

6. Select **Save.**

7. Click **Finished.**

Figure 242: Food Distribution Program State Contacts Maintenance Screen

3.63.8 Modifying Surplus Requests Percent Information

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Table Maintenance.**
3. Select **Surplus Requests Percent.**

Figure 243: Surplus Requests Percent Maintenance Screen (Partial)

13. Select **Modify** for the applicable commodity**.**
14. Modify the **Surplus Request Percent**.
15. Select **Save.**

Figure 244: Surplus Requests Percent Information Screen

Please Note: The Surplus Request Percent indicates the percentage of the surplus quantity a CE can request. For example, 100 cases are available as surplus and the surplus request percent is 50%, the system will only display 50 cases as available for the CEs to request in the CE Delivery Orders screen.

3.63.9 Modifying Survey Types

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Table Maintenance.**
3. Select **Survey Types.**

Figure 245: Survey Types Screen

4. Select **Modify** for the applicable survey type.
5. Modify the **Survey Description.**
6. Select **Save.**
7. Click **Finished.**

3.63.10 Modifying System Defaults

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Table Maintenance.**
3. Select **System Defaults.**

Food Distribution Program System Defaults Maintenance

Default	Description	Value
AgencyDeliveryDateBuffer	Sets the last day an order can be entered, modified or deleted by an Agency User for a scheduled Delivery Date.	3
Invoice_Days_Due	Used to calculate Invoice Due Dates.	30
Invoice_Days_On_Hold	Used by invoices for "Any Balance over # # days..." message.	90
NumberOfDaysToOrder	Defaults allocation Close Date fields.	0
NumberOfDaysToRefuse	Defaults allocation Last Refusal Date fields.	0
ModifyFTSRequestDays	Sets the number of days prior to a Delivery Week that Contracting Entities will not be allowed to modify the Delivery Week.	13
ModifySurveyDays	Sets the number of days prior to a survey month that Contracting Entities will not be allowed to modify the month.	60
Order_Receipt_Days_to_Report	Used to calculate OS&D Reporting Due Date fields.	5
Orders_to_Invoice_Days	Defaults process invoices Orders Shipped on or Before fields.	2

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Figure 246: Food Distribution Program System Defaults Maintenance Screen
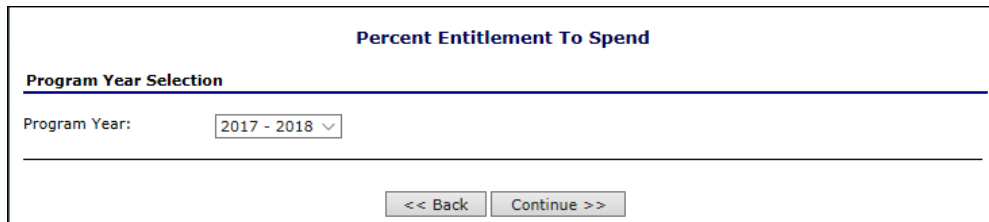
4. Select the **link** for applicable Default.
5. Modify the **Value.**
6. Select **Save.**
7. Click **Finished.**

Default Maintenance

Default	Description	Value
Invoice_Days_Due	Used to calculate Invoice Due Dates.	30

Save   Cancel

Figure 247: Default Maintenance Screen

3.63.11 Modifying Percent Entitlement to Spend

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Table Maintenance.**
3. Select **Percent Entitlement to Spend.**
4. Select a **program year** and click **Continue >>.**
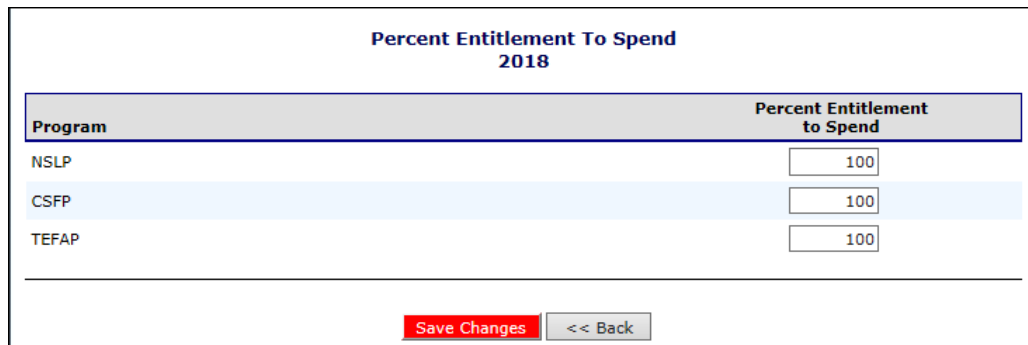
Figure 248: Percent Entitlement to Spend – Program Year Selection Screen

5. Enter the **Percent Entitlement to Spend** for the applicable Program.
6. Click **Save Changes.**

Figure 249: Percent Entitlement to Spend – Percent Input Screen

3.63.12 Pre-Allocation Maintenance

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Table Maintenance.**
3. Select **Pre-Allocation Maintenance.**
4. Using the drop-down box, choose a **Program Year.**
5. Choose a **Program** to create a Pre-Allocation Calculation report.
6. To display CEs, check the **box**.
7. Select the **month** and **year dates** for the start of the Allocation.
8. Check the **Auto box** to initiate an automatic calculation.
9. Enter the **start** and **end dates** by selecting the calendar icon.
10. Select a **calculation day.**

11. Select the **Calculate link.**

12. Select **Save.**

Figure 250: Pre-Allocation Maintenance Screen

3.64 USDA Entities

The USDA Entities function enables the user to view, modify, delete, or create new USDA Entities.

3.64.1 Creating a New USDA Entity

1. Select **FDP Maintenance** from the Operations menu.

2. Select **USDA Entities.**

3. Select **New USDA Entity.**

4. Enter all **information** in the **USDA Entity Profile.**

5. Select **Save.**

6. Click **Finished.**

Figure 251: USDA Entity Profile Screen

3.64.2 Modifying a USDA Entity

1. Select **FDP Maintenance** from the Operations menu.

2. Select **USDA Entities.**

3. Select **Modify** for the applicable **USDA Entity.**

4. Make necessary modifications to any information.

5. Select **Save.**

6. Click **Finished.**

3.64.3 Deleting a USDA Entity

1. Select **FDP Maintenance** from the Operations menu.
2. Select **USDA Entities.**
3. Select **Delete** for the applicable **USDA Entity.**
4. Select **Delete** to receive a confirmation.
5. **Click Finished.**

3.65 Warehouses

The Warehouses function enables the user to search for a warehouse to view, modify, or delete. Here, a new warehouse can also be created.

3.65.1 Searching for a Warehouse

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Warehouses.**

Figure 252: Warehouse Maintenance – Search for Warehouses Screen

3. Enter a **full or partial Warehouse Name**.
4. Select **Search** to access a **list with relevant warehouses.**

3.65.2 Creating a New Warehouse

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Warehouses.**

3. Select **New Warehouse.**

Figure 253: Warehouse Detail – Add Screen

4. Complete all information for the **Warehouse** section.
5. Select **Add.**
6. Click **Finished.**

3.65.3 Viewing or Modifying a Warehouse

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Warehouses.**
3. Use the **search option** to find the warehouse.
4. Select **View** or **Modify.**
5. Make any necessary modifications.
6. Select **Save** or, if viewing, select **Cancel.**
7. Click **Finished.**

3.65.4 Deleting a Warehouse

1. Select **FDP Maintenance** from the Operations menu.
2. Select **Warehouses.**
3. Use the **search option** to find the warehouse.
4. Select **Delete.**
5. Select **Delete Warehouse** to receive a confirmation.
6. Click **Finished.**

4.0 Contracting Entities

The Contracting Entities menu is the Contracting Entity user's gateway to many of the important Food Distribution Program functions. See the menu below and the following sections for more information on orders, surveys, commodity allocations, invoices, and contract functions.

4.1 Contracting Entities Menu

Item	Description
Delivery Orders - CE	Submit and Track Commodity Orders
Surveys	Survey Entry Forms
Commodity Allocations	View or Decline Commodity Allocations
Invoices	View/Print FDP Invoices
Contract	Submit and Maintain Annual Commodity Contract Packet and view Contract Entitlement
Claims	TEFAP, CSFP, FMNP and SFMNP Claims
Download Forms	Forms Available for Downloading

Figure 254: Contracting Entities Menu

4.2 Delivery Orders - CE

The Orders menu is the access point to order commodities, and view commodity orders. The user can also view shipments and report overages, shortages, and damages.

4.2.1 Accessing Orders

1. On the blue menu toolbar, select **Contracting Entities**.
2. Select **Delivery Orders - CE**.

Orders

Item	Description
Open Orders	Order Commodities
Order Inquiry	View Commodity Orders
Shipment OS&D Reporting	Report on Shipment Overages, Shortages & Damages

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Figure 255: Delivery Orders – CE Menu Screen

4.2.3 Creating a New Order

1. Select **Delivery Orders - CE** from the **Contracting Entities menu.**
2. Select **Open Orders.**

Figure 256: Open Orders Screen

3. Select the **Program Year** from the drop-down list.
4. Select the **Program** from the drop-down list.
5. Select **Continue >>**.

Figure 257: Open Orders - NSLP Screen

6. Select **New Order**.

Figure 258: New Order - NSLP Screen

7. Select the **Delivery Location** from the drop-down list.

8. Select the **Warehouse** from the drop-down list.

9. Select **Continue >>.**

ADD

Order Form - NSLP
New Order

Contracting Entity: ACADEMY OF SKILLS AND KNOWLEDGE
CE ID: 00988

Delivery Information

Warehouse:	CBBC DALLAS	**Delivery Date:**	01/04/2018 ⌄
Delivery Location:	CUMBERLAND ACADEMY-DRY	**Delivery Type:**	Delivery ⌄
Delivery Address:	1340 SHILOH RD TYLER, TX 75703	**Contact:**	Phyllis Mauldin (903) 504-5393

Order   Generate Excel File

Commodity	Available Current Allocation	Allocation Order Quantity	Available Surplus Inventory	Surplus Order Quantity	Total Order Quantity
Entitlement Commodities - No Charge					
100098 - CHICKEN CUT-UP FRZ CTN-40 LB Pack Size: 40 LB CTN Cases USDA Value: $33.79	1	0	0	0	0
100188 - PORK HAM CUBED-FRZ-4/10 OR 8/5LB Pack Size: 4/10 OR 8/5 LB Cases USDA Value: $66.57	4	0	0	0	0
Totals:		0		0	0

Select a page: 1 2 | < Prev   Next >   Page 1 of 2

Delivery Comments:

Entitlement

Remaining:	$6,770.72
Used: (Surplus Only)	$0.00

Calculate Entitlement

Save   Cancel

Figure 259: Allocation Order Form - NSLP Screen (Partial)

10. Select the **Delivery Period** from the drop-down list.

 Please Note: For Contracting Entity users, the Delivery Type field is display only.

11. Select the **Delivery Type** from the drop-down list.
12. Enter **order quantities** in the textboxes.
13. Select **Calculate Entitlement** to display entitlement values or select **Save**.

4.2.4 Viewing or Modifying an Order

1. Select **Delivery Orders - CE** from the Contracting Entities menu.
2. Select **Open Orders.**
3. Select the **criteria** (selection of a Contracting Entity or CE ID is required).
4. Select **Continue >>**.

Figure 260: Open Orders - NSLP Screen

5. Select the **Order Number link** to view the order summary or select the **Modify link** to modify the order detail.
6. Make any necessary **modifications.**
7. Select **Calculate Entitlement** to display entitlement values or select **Continue >>.**
8. Review order and select **Submit Order.**

4.2.5 Deleting an Order

1. Select **Delivery Orders - CE** from the Contracting Entities menu.
2. Select **Open Orders.**
3. Select the **criteria** (selection of a Contracting Entity or CE ID is required).

4. Select **Continue >>**.

5. Select the **Order Number link** to View.

6. Select **Delete Order.**

Figure 261: Contracting Entity Order - NSLP Screen (Order Number Link)

4.3 Order Inquiry

The Order Inquiry function enables you to view order details and activity.

4.3.1 Searching for an Order

1. Select **Delivery Orders - CE** from the Contracting Entities menu.

2. Select **Order Inquiry.**

Figure 262: Order Inquiry Screen

3. Enter **Inquiry Criteria** in the respective fields.

4. Select the **Order Status** from the drop-down list.

5. Select a **Display Orders By radio button** (required).

6. Select **Continue >>**. A list of orders displays from the selected criteria.

Figure 263: Order Inquiry - NSLP Screen (by Order Number)

Figure 264: Order Inquiry - NSLP Screen (by Commodity)

4.3.2 Viewing Order Details

1. Select **Delivery Orders - CE** from the Contracting Entities menu.
2. Select **Order Inquiry.**
3. Search for an order by **Order Number** (see preceding topic).

Please Note: The User can also view the Order by searching by commodity. If searching by commodity, select the applicable Item Number link (see preceding figure), then continue to Step 5.

4. Select the **Order Number link** to view that order.

		VIEW
Contracting Entity Delivery Order Form - NSLP		

Contracting Entity: **AVINGER ISD**
CE ID: 00166

Order Number:	97943	Order Status:	Shipped	
Batch Number:	13600	Delivery Date:	09/12/2016	
Warehouse:	CBBC DALLAS	Date Entered:	08/09/2016	
Deliver To:	AVINGER ISD	Entered by:	jsmith12	
	245 CONNER	Date Processed:	09/08/2016	
	AVINGER, TX 75630	Carrier:	CBBC Dallas	

Bonus Commodities

Item	Description	Pack Size	Admin Total	Order Qty	Ship Qty
		There are no commodities in this list.			

Entitlement Commodities

Item	Description	Pack Size	Admin Total	Order Qty	Ship Qty
5533	FC Spaghetti Sauce with Beef	90.78/5.64	$0.000	3	3
7518	WG Breaded FC Breast Chunks	90-130/4.38	$0.000	3	3
		Totals	$0.00	6	6
		Grand Total	$0.00	6	6

Created By: jsmith12   On: 08/09/2016 12:41:58 PM   Modified By: mgonzalez15   On: 09/19/2016 12:26:06 PM

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Figure 265: Contracting Entity Order - NSLP Screen (Order Number Link)

4.3.3 Viewing Order Activity

1. Select **Delivery Orders - CE** from the Contracting Entities menu.
2. Select **Order Inquiry.**
3. Search for an order by **Order Number** (see preceding topic).
4. Select the **Activity link** for an order.

Figure 266: Contracting Entity Order Inquiry - NSLP Screen (Activity Link)

4.4 Shipping Inquiry

The Shipping Inquiry screen enables State users to search for and view Agency Order Shipment Information based upon selected criteria entered.

4.4.1 Completing a Shipping Inquiry

1. Access **Shipping** from the Operations menu.
2. Select **Shipping Inquiry.**
3. Use any or all the criteria below to search for an **OS&D Reporting:**
   o Program Year
   o Program
   o Warehouse/Distributor
   o Contract #
   o Commodity
   o Delivery Date Range (Optional)
   o Display Criteria (Order Number or Commodity)
4. Select **Continue >>.**
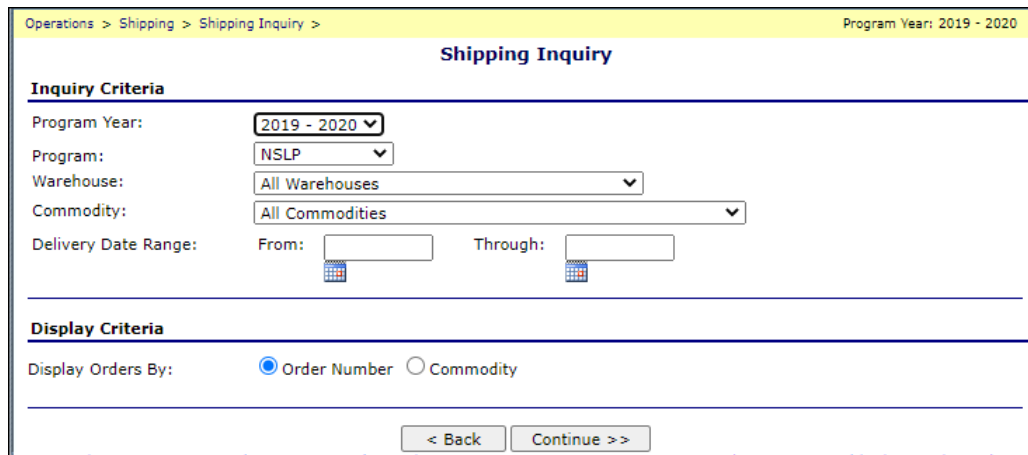
Figure 267: Shipping Inquiry Criteria Screen

5. The screen will display all orders that were delivered by the Warehouse/Distributor during the Delivery Date Range or Program Year specified. All expected deliveries (orders) are represented on the results screen. Recipient Agency, Delivery Date, Delivery Address, and Total $ Amount for Delivery (summed value) are present and correct.

6. At the bottom of the Shipping Inquiry screen will be displayed the total value of units delivered in the orders shown meeting the criteria selected broken into Commodity storage types:
   - Total Freezer Amount
   - Total Dry Amount
   - Total Refrigerated Amount

7. Select **Order Number link.** The Agency Order details will display.

8. Total $ Amount for Delivery will be summed to allow the user to verify that the total value of all deliveries in the Delivery Date Range matches the invoice provided by the Warehouse/Distributor.

9. Select the **Export to Excel button** to export the information to an Excel sheet.

Figure 268: Shipping Inquiry Results

10. The Agency Order Details are displayed.

Figure 269: Agency Order Detail List

4.5 Shipment Overages, Shortages, and Damages (OS&D) Reporting

The Shipment OS&D Reporting function allows Contracting Entity users to report Overages, Shortage, and Damages issues with their deliveries. The Shipping OS&D Reporting – Shipment Search screen enables users to search for shipments based upon selected criteria.

4.5.1 Reporting Overages, Shortages, and Damages

1. Select **Delivery Orders - CE** from the Contracting Entities menu.
2. Select **Shipment OS&D Reporting.**
3. Search for a **Shipment** using the search criteria**.**

Figure 270: Overages, Shortages & Damages (OS&D) Reporting Screen

4. Select **Display Shipments**.

Figure 271: Overages, Shortages, and Damages (OS&D) Reporting Screen

5. Select **Report**.

Figure 272: Overages, Shortages, and Damages (OS&D) Report - NSLP Screen

6. Enter the **number of Units Received** in the respective textboxes.
7. Enter the **number of Units Damaged** in the respective textboxes.
8. Enter any **comments.**
9. Select **Continue >>.**
10. Review information and select **Submit Report**.

4.5.2 Resolve Overages, Shortages, and Damages

1. Select **Delivery Orders – CE** from the Contracting Entities menu.
2. Select **Shipment OS&D Reporting.**
3. Search for a **Shipment** using the search criteria**.**

4.   Select **Resolve.**

Figure 273: Overages, Shortages & Damages (OS&D) Resolution - NSLP Screen

5.   Describe how the **OS&D issues** were resolved in the **Resolution** textbox.
6.   Select **Continue >>**.
7.   Select **Submit Resolution**.

4.5.3 Viewing Overages, Shortages, and Damages

1.   Select **Delivery Orders – CE** from the Contracting Entities menu.
2.   Select **Shipment OS&D Reporting.**
3.   Search for a **Shipment** using the search criteria**.**
4.   Select **View**.
5.   View information.
6.   Select **< Back** or **Cancel** when finished.

4.6 Surveys

The Surveys function enables Contracting Entity users to view and complete surveys.

Please Note: The user must complete and submit the FDP contract before completing Surveys.

4.6.1 Searching a Survey

1. On the blue menu toolbar, select **Contracting Entities**.
2. Select **Surveys**.
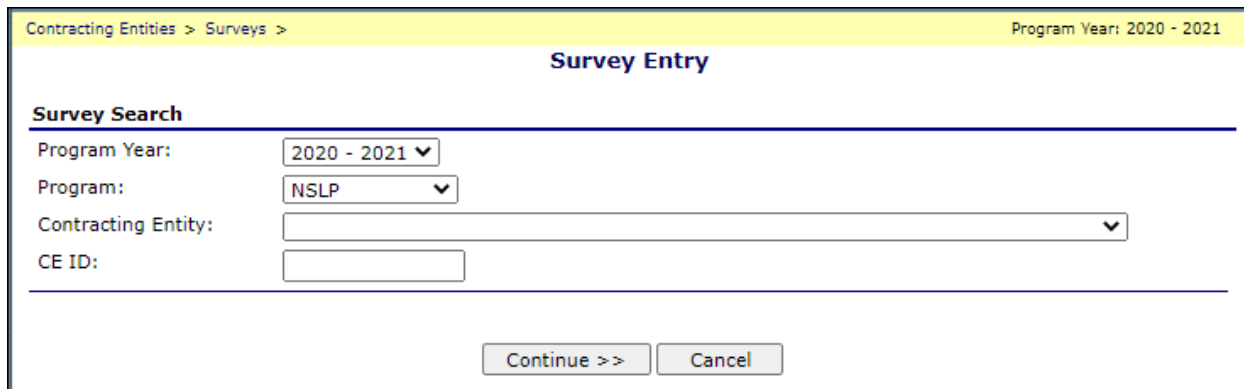
Figure 274: Survey Entry – Survey Search Screen

3. Select **Program Year** from drop-down list.
4. Select **Program** from drop-down list.
5. Select **Contracting Entity** from the drop-down list or enter **CE ID** in the textbox.

.

Please Note: If the user is associated with only one Contracting Entity, the system will always default to the Contracting Entity's data. A processing co-op user or a user associated with more than one Contracting Entity, must select a CE.

6. Select **Continue >>.** A list of Available Surveys displays for the Contracting Entity.

Survey Entry - NSLP

Contracting Entity: ALVIN ISD
CE ID: 00112

Available Surveys

Survey #	Participation Status	Survey Type	Survey Name	Due Date	Survey Status
2031	Submitted	Processing Survey	SPA-Chs & Mozz	03/15/2016	Closed
2032	Not Participating	Processing Survey	SPA-Fruits	03/15/2016	Closed
2033	Submitted	Processing Survey	SPA-Meats	03/15/2016	Closed
2034	Not Participating	Processing Survey	SPA-Staples	03/15/2016	Closed
2035	Submitted	Processing Survey	SPA-Veg	03/15/2016	Closed
2136	Not Submitted	Processing Survey	SPA-Chs & Mozz #2	09/02/2016	Closed
2137	Not Submitted	Processing Survey	SPA-Fruits #2	09/02/2016	Closed
2138	Not Submitted	Processing Survey	SPA-Meats #2	09/02/2016	Closed
2139	Not Submitted	Processing Survey	SPA-Staples #2	09/02/2016	Closed
2140	Not Submitted	Processing Survey	SPA-Veg #2	09/02/2016	Closed
2216	Submitted	Processing Survey	SPA-Chs & Mozz #3	12/02/2016	Closed
2217	Not Submitted	Processing Survey	SPA-Fruits #3	12/02/2016	Closed
2218	Not Submitted	Processing Survey	SPA-Meats #3	12/02/2016	Closed
2219	Not Submitted	Processing Survey	SPA-Staples #3	12/02/2016	Closed
2220	Not Submitted	Processing Survey	SPA-Veg #3	12/02/2016	Closed
1953	Submitted	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-HOUSTON FB	12/09/2016	Closed
1963	Submitted	Annual Survey	Dairy Items-HOUSTON FB	12/09/2016	Closed
1972	Submitted	Annual Survey	Fruits-HOUSTON FB	12/09/2016	Closed
1980	Not Submitted	Annual Survey	Staple Items-HOUSTON FB	12/09/2016	Closed
1988	Submitted	Annual Survey	Vegetables-HOUSTON FB	12/09/2016	Closed

Cancel

Figure 275: Survey Entry – Available Surveys Screen

7. Select the **Survey # link** to display survey details.

4.6.2 Completing a Periodic Survey

1. Search for the applicable survey and select the **Survey # link.**
2. If the user does not wish to participate in the survey, select the **checkbox** to indicate that "you <u>will not</u> participate in this survey" and select **Save**. Otherwise, continue to the next step.

3. Enter the **number of units** for each **commodity for each applicable month.**

Please Note: The Calculate Entitlement button can be selected to calculate the Estimated Entitlement Used. This information also displays on the Survey Entry – Submit screen.

4. Select **Continue >>.**
5. Select **Submit Survey.**

Please Note: One type of Periodic Survey is a Farm to School Commitment Survey. The number entered into the "units" column will be the amount of entitlement "reserved" for Farm to School. The user must indicate **Yes** to participating in the Farm to School Program in the CE Information Update screen.

4.6.3 Completing a Farm to School Survey

1. Search for the applicable survey and select the **Survey # link.**
2. If not participating in the survey, select the **checkbox** to indicate that "you will not participate in the survey" and select **Save.** Otherwise, continue to the next step.
3. Enter the **number of requested units.**
4. Select **Save.**

4.6.4 Completing a Hold/Recall Survey

1. Search for the applicable survey and select the **Survey # link.**
2. If there are not any donated foods identified by the Can/Package Codes below on hand, select the **checkbox** and select **Save.** Otherwise, continue to the next step.
3. For Section 1, enter the number of **can/units.**
4. Enter the **destruction method.**
5. For Section 2, select the **checkbox**, if applicable.
6. Enter the number of **can/units.**
7. Enter any **comments.**
8. Complete **Sections 3** and **4.**
9. Select **Save.**

4.6.5 Completing a Processing Survey

1. Search for the applicable survey and select the **Survey # link.**
2. If not participating in the survey, select the **checkbox** to indicate that "you will not participate in the survey" and select **Save**. Otherwise, continue to the next step.
3. Enter the **number of units** to process.
4. Select the **Processor** from the drop-down list.

Please Note: Selecting the Calculate Entitlement button to calculate the Estimated Entitlement Used. This information also displays on the Survey Entry – Submit screen.

5. Select **Continue >>.**
6. Select **Submit Survey.**

Please Note: For processing co-ops, a processing survey will display once all the co-op's members have "submitted" their FDP contract for approval.

4.6.6 Completing an Annual Request

1. Search for the **applicable survey** and select the **Survey # link.**
2. If not participating in the survey, select the **checkbox** to indicate that "you will not participate in the survey" and select **Save**. Otherwise, continue to the next step.
3. Enter the **number** of **requested units.**
4. Select **Save.**

Please Note: Entitlement used will update to equal the value of units requested. Available Entitlement will not decrease. If a request that causes the Entitlement Used to exceed Available Entitlement, an error message will display.

4.7 Commodity Allocations

Users can access the Allocation Inquiry functions from the Commodity Allocations.

4.7.1 Accessing Commodity Allocations

1. On the blue menu toolbar, select **Contracting Entities.**
2. Select **Commodity Allocations.**

Item	Description
Allocation Inquiry	View Allocations

< Back

Figure 276: Commodity Allocations Menu

4.8 Allocation Inquiry

The Allocation Inquiry screen enables you to search for an allocation and view allocation details.

Figure 277: Allocation Inquiry – Allocation Search Screen

4.8.1 Viewing Allocation Details

1. On the blue menu toolbar, select **Contracting Entities**.
2. Select **Commodity Allocations**.
3. Select **Allocation Inquiry.**
4. Enter **search criteria.**

Please Note: A Contracting Entity Name or CE ID is required.

5. Select **Search**.

Figure 278: Allocation Inquiry – NSLP Screen

6. Select an **Allocation Name** link to view the **Commodity Allocation Report** or select a **QTY Remaining link** to view the **Allocation Detail**.

Figure 279: Commodity Allocation Report Screen

Figure 280: Allocation Inquiry – Allocation Details Screen

Please Note: Allocations will display the value of commodities allocated, including those not charged against entitlement. Commodities that have been charged entitlement will display in the CE Contract Entitlement screen and then clicking on the Entitlement Used link.

4.9 Invoices

The Invoices function allows Contracting Entity users to view and print their invoices for remittance. The Invoices screen enables the user to search for invoices.

4.9.1 Printing an Invoice

1. On the blue menu toolbar, select **Contracting Entities**.
2. Select **Invoices**.

Figure 281: Invoices Screen

3. Select a **Program Year** from the drop-down list.

4. Select a **Program** from the drop-down list.

5. Select a **Contracting Entity** from the drop-down list or enter a **CE ID.**

6. Select **Continue >>.**

7. Select an **Invoice Number link.**

FDP Invoice Listing

Contracting Entity: **ALVIN ISD**
CE ID: 00112

⦿ Show All Invoices
◯ Show Outstanding Invoices Only
Any balance over 90 days may result in future distributions being put on hold.

Invoices

Invoice Number	Invoice Date	Due Date	Invoice Type	Invoice Amount	Balance
17 035630	02/20/2017	03/22/2017	Orders - Warehouse	$1,083.60	$1,083.60
17 035381	02/06/2017	03/08/2017	Orders - Warehouse	$210.24	$210.24
17 034904	01/16/2017	02/15/2017	Orders - Warehouse	$598.00	$598.00
17 034819	01/13/2017	02/12/2017	Orders - Warehouse	$600.60	$600.60
17 033960	11/23/2016	12/23/2016	Orders - Warehouse	$600.60	$600.60
17 033323	10/31/2016	11/30/2016	Orders - Warehouse	$1,105.72	$1,105.72
17 033012	10/17/2016	11/16/2016	Orders - Warehouse	$124.80	$124.80
17 032572	09/30/2016	10/30/2016	Orders - Warehouse	$247.38	$247.38
17 032121	09/13/2016	10/13/2016	Orders - Warehouse	$1,280.02	$1,280.02
17 031792	08/30/2016	09/29/2016	Orders - Warehouse	$356.32	$356.32
			Totals:	**$6,207.28**	**$6,207.28**

< Back

Figure 282: FDP Invoice Listing – NSLP Screen

8. Select an **Invoice Number link.**

9. Select **Print Invoice** to print.

4.10 Contract

The Contract menu option enables you to submit and maintain your annual commodity contract packet and view contract entitlement information.

4.10.1 Accessing Contract

1. On the blue menu toolbar, select **Contracting Entities**.

2. Select **Contract**.

Item	Description
Contract Packet	Submit FDP Contract Packet and Update Contact information
Contract Entitlement	View Entitlement Distribution and Usage

< Back

Figure 283: Contract Menu

4.11 Contract Packet

The Food Distribution Program Contract Packet is the starting point for all tasks related to the Contracting Entity's annual commodities contract. This screen contains all contract and forms for a Contracting Entity's contract packet, including the Contracting Entity Information Update/Certification, Contacts information, and Delivery Location information.

A Contracting Entity information header displays in a box at the top of the screen and contains the Contracting Entity name and CE ID. In addition, it displays the Packet Status, Packet Approved Date (if applicable), and Contract Status.

An Annual Contract can only be deleted if there are no records associated with the contract (i.e., Allocations, Orders, etc.).

Food Distribution Program (FDP) Contracts

Program Year: 2016 - 2017
Program: NSLP
Contracting Entity: ALVIN ISD-00112
CE ID:

Continue >>   Cancel

Figure 284: Food Distribution Program Contract Packet– FDP Screen

4.11.1 Accessing the Contract Packet

1. On the blue menu toolbar, select **Contracting Entities**.
2. Select **Contract Packet**.
3. Select **Program Year** from the drop-down list.
4. Select **Program** from the drop-down list.
5. Select a **Contracting Entity** or enter a **CE ID.**

6. Select **Continue >>.** The **Contracting Entity's Contract Packet** displays.

Food Distribution Program Contract Packet – NSLP
2016-2017

Contracting Entity: ALVIN ISD			Packet Status: Submitted
CE ID: 00112			Packet Approved Date:
			Contract Status: Approved

Action			Form Name	Status
View Modify			**FDP Contract**	Approved
View Modify	✓		**Contracting Entity Information Update**	Certified
View Modify Admin	✓		Checklist	Approved
			Contacts:	
View Modify	✓		Food Service Director: Jennifer Basich (281) 245-2277 jbasich@alvinisd.net	Certified
View Modify	✓		Ordering Contact: Sandy Smith (281) 245-2518 ssmith@alvinisd.net	Certified
View Modify	✓		Billing Contact: Sandy Smith (281) 245-2518 ssmith@alvinisd.net	Certified
Add/Remove Location			**Delivery Locations:**	
View Modify			ALVIN ISD WAREHOUSE Warehouse(s): HOUSTON FOOD BANK	
View Modify			Notes (0)	

< Back | Submit For Approval | Withdraw Packet | Terminate Contract

Approve | Return for Correction

Packet History

Event	Event Date/Time	User
A Packet was created for ALVIN ISD for year 2016 - 2017.	01/08/2016 4:50:29 PM	MMCELHANEY
The contract packet has been submitted.	01/26/2016 9:19:34 AM	ssmith13

Figure 285: Food Distribution Program Contract Packet– FDP Screen

4.11.2 Viewing a Contract

1. Access the **Food Distribution Program Contract screen.**
2. Select **View** for **FDP Contract.**
3. Select **Cancel** when finished**.**

4.11.3 Viewing or Modifying Contact Information

The following section pertains to Food Service Director, Ordering, and Billing Contact information. Contact Information for each contact type must be created for each contracting entity, as this contact information will appear on various documents printed using the Reports functionality.

1. Access the **Food Distribution Program Contract** screen.
2. Select **View or Modify** for the **Program, Ordering, or Billing Contact.**
3. View or make any necessary **modifications.**
4. Select the **checkbox** for the **Contact Information Certification**, if applicable.
5. If viewing, select **Cancel** or if modifying, select **Save.**

Helpful Tips

Tip: *Copy information from a saved Contact by selecting the "Copy contact information from" checkbox at the top of the form. For example:*

Contact Information

Copy contact information from: ☑ Billing Contact   ☐ Ordering Contact

Figure 286: Commodity Contact Profile Screen

4.11.4 Viewing or Modifying a Delivery Location Profile

1. Access the **Food Distribution Program Contract screen.**
2. Select **View** or **Modify** for the applicable Delivery Location.
3. If viewing, select **< Back** when finished or if modifying, select **Save.**

Please Note: Availability of editable fields varies by security group.

Figure 287: Delivery Location Profile Screen (Partial Screen)

4.11.5 Submitting a Contract Packet for Approval

All components of the contract packet (Contracting Entity Information Update, Food Service Director contact, Billing contact, Ordering contact, and any applicable checklist items) must be complete before a Contracting Entity can submit the packet for approval.

1. Access the **Food Distribution Program Contract screen.**
2. Select **Submit for Approval**. The screen re-displays and displays that the packet has been submitted for approval in the Packet history section.

4.12 Contract Entitlement

The Contract Entitlement function enables you to view entitlement distribution, entitlement used, and remaining entitlement amounts for your Contracting Entity.

Figure 288: Contract Entitlement – NSLP Screen

4.12.1 Viewing Entitlement Distribution Detail

1. On the blue menu toolbar, select **Contracting Entities**.
2. Select **Contract**.
3. Select **Contract Entitlement.**
4. Select the **link** under the **Contracting Entity column.**

Figure 289: Entitlement Distribution Detail – NSLP Screen

4.12.2 Viewing Entitlement Distribution History

1. On the blue menu toolbar, select **Contracting Entities**.
2. Select **Contract**.
3. Select **Contract Entitlement.**
4. Select the **link** under the **Entitlement Distribution column.**

Figure 290: Contract Entitlement – NSLP Screen

5. Select the **Manual Adjustment link** to view the adjustment details.

Figure 291: Entitlement Distribution Adjustment – NSLP Screen

4.12.3 Viewing Entitlement Distribution Usage

1. On the blue menu toolbar, select **Contracting Entities**.
2. Select **Contract**.
3. Select **Contract Entitlement.**
4. Select the **link** under the Entitlement Used column.

Please Note: Selecting a link in the Description column displays the Commodity Allocation Report. Allocations will display the value of commodities allocated, including those not charged against entitlement. Commodities that have been charged entitlement will display in the CE Contract Entitlement screen and then clicking on the Entitlement Used link.

Figure 292: Entitlement Usage – NSLP Screen (Partial)
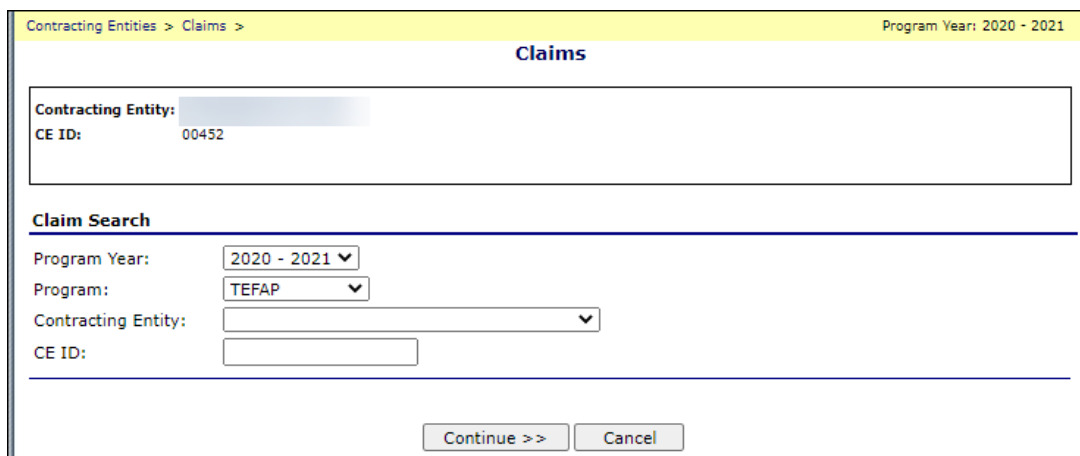
Please Note: For more information on the entitlement screen, reference the Information Sheets.

4.13 Claims

A Contracting Entity submits a reimbursement claim to the State for every month in which one or more sites participate in FDP Program. Contracting Entity and site information may be entered into the monthly claim form beginning at the first of every month. Contracting Entities have sixty (60) days from the last day of the claim month/year to submit an original claim. At the time claims are submitted, the claim is reviewed by the system to ensure that it confirms to established business rules governing reimbursement claim eligibility and approval.

4.13.1 Accessing a Claim

1. On the blue menu toolbar, select **Contracting Entities.**
2. From the menu, select **Claims.**
3. Select the **Program Year.**
4. Select the **Program.**
5. Select the **Contracting Entity** or the **CE ID.**
6. Select **Continue >>.**

Figure 293: Claims Screen

4.13.2 Viewing a Claim Summary

1. From the Claim Year Summary screen, select the **applicable month** to access that specific claim.

Figure 294: Claims Screen

2. Select **View** under the Claims Items column next to the corresponding claim.

Figure 295: Claims Screen

3. The **Claim for Reimbursement screen** displays.
4. Select **<Back** to return to the previous screen.

Figure 296: Claims for Reimbursement Screen (Partial)

4.13.3 Modifying a Claim Summary

1. From the Claim Year Summary screen, select the **applicable month** to access that specific claim.
2. Select **Modify** next to the applicable claim.
3. Make any necessary **modifications.**
4. Select **Save.** A certification screen will display.
5. Select the **checkbox** to certify that the claim is true and correct.
6. Click the **Submit for Approval** button.
7. Select **<Modify** to continue making revisions or select **Finish** to return to the Claims menu screen.

4.13.4 Adding a Revision

1. From the Claim Year Summary screen, select the **applicable month** to access that specific claim.
2. Select **Add Revision** located at the bottom of the screen.
3. Make any necessary **modifications.**
4. Select **Save.** A certification screen will display.
5. Select the **checkbox** to certify that the claim is true and correct.

6. Click the **Submit for Approval** button.
7. Select **<Modify** to continue making revisions or select **Finish** to return to the Claims menu screen.

4.14 Download Forms

The Download Forms feature provides the State the ability to define and save form templates for access by users within the system.

4.14.1 Downloading a Form

1. On the blue menu toolbar, select **Contracting Entities**.
2. From the Contracting Entities menu screen, select **Download Forms.**

Contracting Entities >			Program Year: 2017 - 2018	
Download Forms				
View: Grouped ∨				
⊟ Form ID	Description		Last Modified	New Contracting Entity?
⊟ FDP - General (1)				
FDP-1	AJFA Poster Order Form		10/27/2016	Y
⊟ Food Distribution Forms for All Programs (1)				
FND 101	Certificate of Authority for External User		03/08/2016	Y
⊟ Food Distribution Forms for NSLP (1)				
Transfer Form	USDA Donated Food Transfer Form		12/14/2015	N
⊟ TX-UNPS Information Sheets for NSLP (9)				
015-909	Change Contact Information		12/14/2015	N
015-901	Completing Annual Survey		12/14/2015	N
015-903	Completing Orders		12/14/2015	N
015-904	Completing the Food Distribution Packet		12/14/2015	N
015-910	Entitlement Management: Processing Reserve		12/14/2015	N
015-905	Locating Delivery Schedule		12/14/2015	N
015-906	Ordering Surplus		12/14/2015	N
015-907	Retrieving Bulletins		12/14/2015	N
015-900	Statement of Commodities Allocated		10/03/2017	N

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Figure 297: Download Forms Screen

3. The Download Forms screen can be viewed in a **Grouped or Sortable Format**. Select the applicable format from the drop-down list next to **View.**
4. In the **Form ID column**, select the applicable **Form link** to access a document.
5. A pop-up box will display prompting the user to **Open, Save,** or **Cancel** the action.

What do you want to do with 015-909 How to change contact information.pdf (759 KB)?
From: ccg.snpweb.com | Open | Save | ⌃ | Cancel | ✕
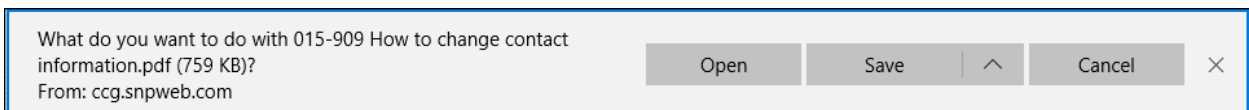
Figure 298: Download Forms Pop-Up Action Box

6. The selected Form will be opened or saved to the computer.

5.0 Reports

Reports for the Food Distribution Program are available to users through the Reports component.

5.1 About Reports

The Reports component of the FDP module enables users to run, view, and print reports by utilizing information gathered and logged by the application. The Report List contains all reports available within the module and is divided into groups. Each report is categorized and listed alphabetically under these groups. As new reports are added to the system, this menu will expand to show those new reports.

Once a user selects a particular report, the system may prompt the user for additional information needed before building the report, such as a particular Fiscal Year, Claim Month, Contracting Entity, and/or Sort Order.

While all reports are available to state users, contracting entities users have access to only certain reports. Therefore, the Reports menu will only display categories containing reports to which the user has access.

5.1.1 Viewing Report

1. On the blue menu toolbar at the top of the page, click **Reports** to access the List.

*Tip: Use the Report Filter to filter Report list by Report Group. For example, to display only USDA Reports, select USDA Reports form the drop-down list and click **Apply Filter.** The Report List automatically refreshes.*

2. Click the report you wish to view from the **Report List.** The report parameters screen may display.
3. If required, use the drop-down lists and/or text fields to enter parameters.
4. Click **Create Report.** The report displays in a new window.

Please Note: The report will not open in a new window if a pop-up blocker running on the system. If this occurs, hold down the CTRL key and click Create Report again.

Figure 299: Food Distribution Program Reports - Example (Partial)

5.2 Report Parameters

Most reports require one or more parameters to be entered in order to customize the report to the user's specific needs. Report parameters may limit data contained in the report or control how the information is sorted or grouped. Below is an example of types of report parameters that may be used for running a report.

Figure 300: Report Parameter – Recipient Contracting Entity Contracts Report

5.3 Report

Below is an example of a report displayed in SQL Report Services.

		Texas Department of Agriculture
County Report		Food Distribution Program
Shipments To:	All Contracting Entities	Program Year: 2017 - 2018
Shipment Type:	All Shipments	Program: All Programs

County	Item Number	Commodity	Units Shipped	USDA Value
BEXAR County				
NSLP				
	110361	APPLESAUCE CUP 96/4.5 OZ.-SHELF STB	1,000	$13,390.00
		NSLP Totals:	1,000	$13,390.00
		BEXAR County Totals:	1,000	$13,390.00
TRAVIS County				
NSLP				
	200212	Mixed Fruit Can-6/10 PROC	870	$530.70
		NSLP Totals:	870	$530.70
		TRAVIS County Totals:	870	$530.70
		State Totals:	1,870	$13,920.70

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Figure 301: Sample Report

- The report displays in the right-hand pane. Use the scroll bar to scroll through the report or the right and left arrows ◄ ► to navigate through the report one page at a time.
- To print the report, click on the printer icon then use the printer setup dialogue box to indicate what you wish to print.
- Reports displayed as web pages are printed using the web browser 'Print' button.

5.3.1 Exporting Reports

1. On the blue menu toolbar at the top of the page, click **Reports**. The Report List displays.

*Tip: Use the Report Filter to filter Report list by Report Group. For example, to display only USDA Reports, select USDA Reports from the drop-down list and click **Apply Filter**. The Report List automatically refreshes.*

2. Click the **report** to view from the Report List to access the **report parameters screen.**
3. If required, use the **drop-down lists** and/or **text fields** to enter parameters.
4. Click **Create Report** to open a new window.
5. Select the **format** to export from the drop-down list (shown in the following figure).
6. Click **Export.**

6.0 Security

Security is an important part of the integrity of the web site. The Security component of the FDP module is the access point to user-level security settings. Individuals may change their password through the Change Password feature, while administrators and State users can manage other user-level security settings through the User Manager. In addition, state and contracting entity users with security clearance can manager individual user settings within the User Manager.

Please Note: The Security component of the FDP module is primarily intended for contracting entity users and administrators. State users may prefer to access the Security module through the main Programs menu.

6.1 Security Menu

The Security menu is the access point to the Change Password and User Manager functions.

6.1.1 Changing Password

System security is greatly enhanced by regularly modifying your password.

Please Note: Default security settings require that a password must between (10) to twelve (12) characters in length. The password must be at least ten (10) characters in length. The password must contain at least one number, one letter, and one special character (e.g., !, ?, /). Passwords are case sensitive.

| Security > | Program Year: 2020 - 2021 |

Item	Description
Change Password	Change Password for Logged-In User
User Manager	Enables maintenance of existing user profile, groups, and rights and creating new users
CE System Logins	Contracting Entity System Logins

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Figure 302: Security Menu Screen

6.1.2 Accessing Change Password

1. On the blue menu toolbar, click **Security**.
2. On the **Security menu**, click **Change Password.** The **Change Password screen** displays.
3. Enter your **New Password**.
4. Re-enter the **New Password.**
5. Click **Save** to receive a **confirmation.**
6. Click **<Edit** to return to the **Change Password screen** or click Finish to return to the **Security menu.**
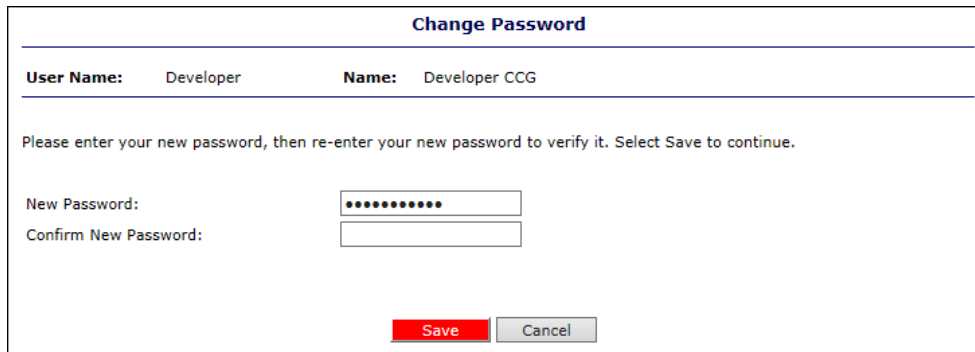
Figure 303: Change Password Screen

6.2 User Menu

The User Manager allows authorized users to set up and maintain various components of a user's security access. The features within the User Manager enable you to add new users, set up and modify user profiles, change passwords, and set assigned groups, security rights and associated CEs.

6.2.1 Accessing User Manager

1. On the blue menu toolbar, select **Security**.
2. Select **User Manager**. The Search for User screen displays.

6.2.2 Searching for a User

Before proceeding in the User Manager, you must always search for and select a user you wish to access. If you have already selected a user or are elsewhere in the application, return to the User Manager screen.

1. From the **User Manager/Search for User Page**, select the type of search on the **Search By** drop-down list. Enter the **Last Name** or **Username** in the text box and select **Search** or **Select All** to display a list of all users. A list of users matching the search criteria will display.

2. Select a specific **User.** The User Options menu displays.

> **Note:** The names displayed are dependent on the user's type. The chart below describes how a user's type is denoted and which users will be displayed in the search for each type:

User Type	Denoted by	Users displayed
Administrators	"Yes" in Administrator column	All
State Employees	Names and User IDs in bold	Non-administrators
CE users	Non-bolded names; blank administrator column	Non-administrators

6.2.3 Adding a New User

If you have already selected a user or are elsewhere in the application, return to the User Manager screen.

1. From the User Manager screen, select **Add New User** to access the **User Profile screen** displays.
2. Enter the **new user's information** in the User Information section.
3. Enter the **new user's login name** and **password.** Enter the **password** again for confirmation (the new user is required to create a new password upon first logging in).

4. Use the **buttons** to select if the user is a State employee, an administrator, and if the user is to only be granted access to associated CEs.
5. Use the **drop-down menu** to select the **user's status.**
6. Select **Save** to receive a confirmation screen.

Please Note: After creating a new user, it is recommended that the user is assigned to a specific group. Until the user is linked to a security group, he or she does not have any security rights and will not be able to access any system functions.

6.3 User's Profile

The User's Profile enables the ability to view and modify a user's basic information, login, security base, and status. In addition to name, contact, and login information, the user's profile specifies whether the user is a State employee, an administrator, and if the user is granted access to associated CEs only. These specifications affect which program functions the user may access. Furthermore, users specified as **Active** have access to all normal functions, while **Inactive** and **Locked** users are not permitted to login or access the system.

Please Note: Passwords cannot be changed within the user's profile. This function is accessed through the User Manager. For information regarding resetting passwords, see Reset User's Password.

6.3.1 Accessing User's Profile

1. On the blue menu toolbar, select **Security**.
2. Select **User Manager**. The Search for User screen displays.
3. On the **Search By** drop-down list, select the **type of search**, enter the **Last Name or Username** in the text box, and then select **Search** or select **All** to display a list of all users. A list of users matching the search criteria displays.
4. Select a **User**. The User Options menu displays.
5. Select **User's Profile**.

6.3.2 Viewing or Modifying a User's Profile

1. Access the **User's Profile** to view or modify through the User Manager.
2. Make any necessary **modifications.**
3. Select **Save** to receive a confirmation.

Please Note: To make any modifications, **Modify** must be selected on the Edit menu in the top-right corner.

6.3.3 Deleting a User's Profile

WARNING: Once a profile has been deleted, it cannot be restored. Use caution before deleting profiles.

1. On the blue menu toolbar, select **Security**.
2. Select **User Manager**. The Search for User screen displays.
3. On the **Search By** drop-down list, select **Last Name** or **Username**, enter all or part of the **Name in the text box**, and then Select **Search** or select **All** to display a list of all users. A list of users matching the search criteria displays.
4. Select a **User**, the **User Options menu** displays.
5. Select **User's Profile**. The **User Profile screen** displays.
6. On the **Edit menu**, select **DELETE**. A warning displays.
7. Select **Delete** to receive a **confirmation.**

6.4 User's Assigned Group(s)

The User Assigned Group(s) enables you to assign a user to numerous pre-defined groups. Groups are created as a way to categorize multiple users together to provide identical security settings for the entire group. Changing any security setting for the group changes the setting for each member in that group.

6.4.1 Accessing User Assigned Group(s)

1. On the blue menu toolbar, select **Security**.
2. Select **User Manager**. The Search for User screen displays.
3. On the Search By drop-down list, select **Last Name** or **Username**, enter all or part of the **Name in the text box**, and then select **Search** or select **All** to display a list of all users to access a list matching the search criteria.
4. Select the **User** to access the User Options menu.
5. Select **User's Assigned Group(s)**. The User's Assigned Group(s) screen displays.

Figure 304: User's Assigned Group(s) Screen

6.4.2 Adding a User to Assigned Group(s)

1. On the blue menu toolbar, select **Security**.
2. Select **User Manager**. The Search for User screen displays.
3. On the Search By drop-down list, select **Last Name** or **Username**, enter all or part of the **Name in the text box**, and then select **Search** or select **All** to display a list of all users to access a list matching the search criteria.
4. Select the **User** to access the User Options menu.
5. Select **User's Assigned Group(s)**. The User's Assigned Group(s) screen displays.
6. Select the **group** to add the user to on the Available Group list.

Please Note: To make any modifications, **Modify** must be selected on the Edit menu.

7. Select **OK** on the Message box that appears.
8. Select **Save** to receive a confirmation.

6.4.3 Removing a User from Assigned Group(s)

1. On the blue menu toolbar, select **Security**.
2. Select **User Manager**. The Search for User screen displays.
3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then select **Search** or select **All** to display a list of all users to access a list of users matching the search criteria.
4. Select the **User** to access the User Options menu.
5. Select **User's Assigned Group(s)**. The User's Assigned Group(s) screen displays.
6. Select the group you want to remove the user from on the Available Group list.

Please Note: To make any modifications, **Modify** must be selected on the Edit menu.

7. Select **<Remove**.
8. Select **OK** on the Message box that appears.
9. Select **Save** to receive a confirmation.

6.5 User's Security Rights

The User's Security Rights feature enables administrators to set security rights for an individual user. These rights determine the areas within the system's programs and modules the user is granted access.

When a user has assigned groups, the groups' default security settings will apply and display in the user's security rights. No more rights may be given to the user than are given to the group. However, administrators may deny user's specific rights through this feature. Users cannot modify their own security rights.

6.5.1 Accessing User's Security Rights

1. On the blue menu toolbar, select **Security**.
2. Select **User Manager**. The Search for User screen displays.
3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the **Name in the text box**, and then select **Search** or select **All** to display a list of all users to access a list of users matching the search criteria.
4. Select the **User** to access the User Options menu displays.
5. Select **User's Security Rights**. The User's Security Rights screen displays.

6.5.2 Modifying a User's Security Rights

1. On the blue menu toolbar, select **Security.**
2. Select **User Manager**. The Search for User screen displays.
3. On the **Search By** drop-down list, select **Last Name** or **Username**, enter all or part of the **Name in the text box**, and then select **Search** or select **All** to display a list of all users to access a list matching the search criteria.
4. Select the **User** to access the **User Options menu**.
5. Select **User's Security Rights**. The User's Security Rights screen displays.

Please Note: To make any modifications, **Modify** must be selected on the Edit menu.

6. Make any necessary **modifications.**
7. Select **Save** to receive a confirmation.

6.6 User's Associated CEs

The User's Associated CEs feature enables the ability to associate individual users to specific CEs. In order for users to have access to system functions for a Contracting Entity, such as claims access, users must be associated with the Contracting Entity. Similarly, users who should no longer have access to Contracting Entity functions need to have their Contracting Entity association removed.

6.6.1 Accessing User's Associated CEs

1. On the blue menu toolbar, select **Security**.
2. Select **User Manager**. The Search for User screen displays.
3. On the Search By drop-down list, select **Last Name** or **Username**, enter all or part of the **Name in the text box**, and then select **Search** or select All to display a list of all users to access a list matching the search criteria.
4. Select the **User** to access the User Options menu displays.
5. Select **User's Associated CEs**. The User's Associated CEs screen displays.

Figure 305: User's Associated CEs Screen

6.6.2 Adding a CE Association

1. On the blue menu toolbar, select **Security**.
2. Select **User Manager**. The Search for User screen displays.
3. On the **Search By** drop-down list, select **Last Name** or **Username**, enter all or part of the **Name in the text box**, and then select **Search** or select **All** to display a list of users to access a list matching the search criteria.
4. Select the **User** to access the User Options menu displays.
5. Select **User's Associated CEs**. The User's Associated CEs screen displays.
6. Select **Add CE**. The Add User's Associated CEs screen displays.
7. Enter the **Agreement Number** or the **CE Name**, and then select **Search** or select **All** to display a list of all CEs to access a list matching the search criteria.
8. Select **Add Association** to the left of the CE you want to associate with the User to receive a confirmation message.
9. Select **Finish**. The User's Associated CE screen displays with the newly added Contracting Entity on the list.

6.6.3 Removing a CE Association

1. On the blue menu toolbar, select **Security**.
2. Select **User Manager**. The Search for User screen displays.
3. On the **Search By** drop-down list, select **Last Name** or **Username**, enter all or part of the **Name in the text box**, and then select **Search** or select **All** to display a list matching the search criteria.
4. Select the **User** to access the User Options menu.
5. Select **User's Associated CEs**. The User's Associated CEs screen displays.
6. Select **Remove** to the left of the CE you want to remove to receive a confirmation message.

6.7 Reset User's Password

The Reset User's Password enables you to reset a user's password required to login to the system.

Please Note: Passwords can be reset for user's who have forgotten their passwords. If a user makes an attempt to log in with an incorrect password, a Login Error will display. The user will be temporarily locked out of the system after six unsuccessful login attempts. Remember, passwords are case-sensitive.

6.7.1 Resetting a User's Password

1. On the menu toolbar, select **Security**.
2. Select **User Manager**. The Search for User screen displays.
3. On the **Search By** drop-down list, select **Last Name** or **Username**, enter all or part of the **Name in the text box**, and then select **Search** or select **All** to display a list of all users to access a list matching the search criteria.
4. Select the **User** to access the User Options menu.
5. Select **Reset User's Password**. The Reset User's Password screen displays.
6. Enter the **New Password.**

Please Note: Default settings require a password to be at least six characters in length containing one or more numbers. However, these settings can be changed by State Administrators within the Configuration module.

Tip: Strong, secure passwords contain between 6 and 15 characters, including numbers, upper-case, and lower-case letters.

7. Confirm the **New Password.**
8. Select **Save** to receive a confirmation.

Change Password

Contracting Entity:	ABERNATHY ISD
CE ID:	00452

User Name:		Name:	

Please enter your new password, then re-enter your new password to verify it. Select Save to continue.

New Password: ••••••••••
Confirm New Password:

Save   Cancel

Figure 306: Reset User's Password Screen

7.0 Compliance – Review Tracking

The Compliance Review Tracking section provides instructions regarding how to navigate through and use the features associated with Administrative Reviews, including Corrective Action Documents (CADs) Through the web-based Compliance module, authorized users can:
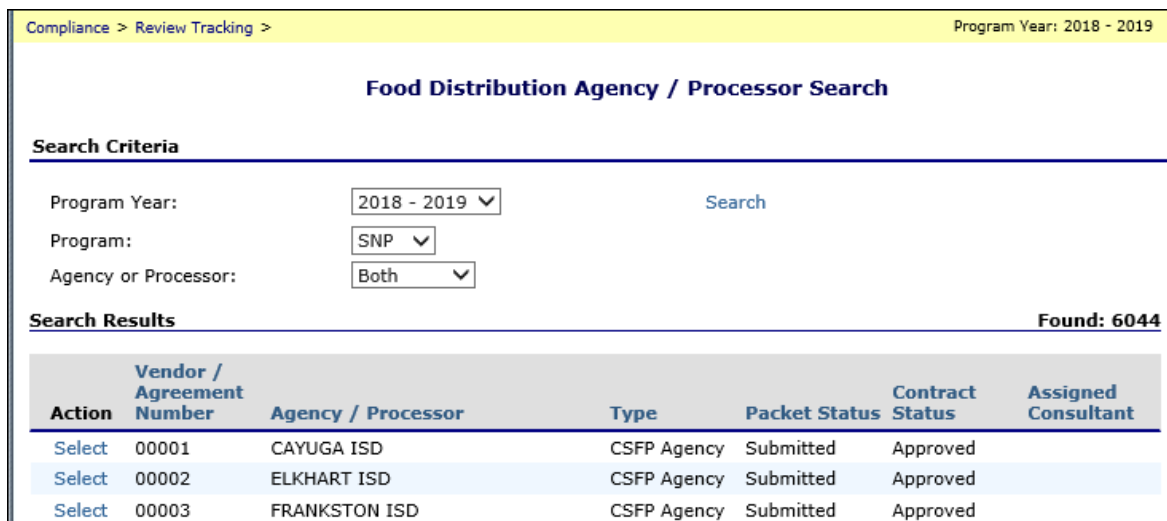
- View review schedules.
- Enter and maintain SFA contact information related to the review.
- Complete select off-site review forms.
- Submit CADs to the State for review.
- View commendation and technical assistance information.
- View notes from the State.
- Attachment documents within the system.

7.1 Review Tracking

The Review Tracking can be used to add a new Compliance Review or open an existing Compliance Review to view or modify.

7.1.1 Selecting an Agency/Processor

1. On the menu toolbar, select **Compliance.**
2. Select **Review Tracking**. The Food Distribution Agency/Processor Search screen displays.
3. Click on **Select** next to the applicable Agency/Processor in the Action column.

Compliance > Review Tracking >   Program Year: 2018 - 2019

Food Distribution Agency / Processor Search

Search Criteria

Program Year:	2018 - 2019 ✓	Search
Program:	SNP ✓	
Agency or Processor:	Both ✓	

Search Results   **Found: 6044**

Action	Vendor / Agreement Number	Agency / Processor	Type	Packet Status	Contract Status	Assigned Consultant
Select	00001	CAYUGA ISD	CSFP Agency	Submitted	Approved	
Select	00002	ELKHART ISD	CSFP Agency	Submitted	Approved	
Select	00003	FRANKSTON ISD	CSFP Agency	Submitted	Approved	

Figure 307: Search Menu Screen (Partial)

7.1.2 Adding a New Review

1. On the menu toolbar, select **Compliance.**
2. Select **Review Tracking.** The Food Distribution Agency/Processor Search screen displays.
3. Click on **Select** next to the applicable Agency/Processor in the Action column.
4. Select **Add New Review.**

Food Distribution Agency Reviews

Agency: **FRANKSTON ISD** change
Vendor Number: 00003

Action	Review ID	Review Year	Type of Review	Cap Due Date	Cap Accepted Date	Scheduled Review Date	Review Type	Exit Complete	Review Closed Date
Details	32392						FDP	No	

Add New Review

< Back

Figure 308: Compliance Review Screen

5. Complete the **FDP Reviews Compliance Review** form.
6. Click **Save** to receive a confirmation.

Add | View | Modify

FDP Reviews
Compliance Review - CSFP Agency

Agency: **FRANKSTON ISD** change
Vendor Number: 00003

Review Information Confirmation

Review : 32392

Review information has been saved

< Edit   Finish

Figure 309: Confirmation Screen

7.1.3 Viewing or Modifying a Review

1. On the menu toolbar, select **Compliance.**
2. Select **Review Tracking.** The Food Distribution Agency/Processor Search screen displays.
3. Click on **Select** next to the applicable Agency/Processor in the Action column.
4. Select **Details.**

5. Select **View** or **Modify** located in the top-right corner of the screen to access the Compliance Review.
6. Make any necessary **revisions.**
7. Select **Save** to receive a confirmation.