

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

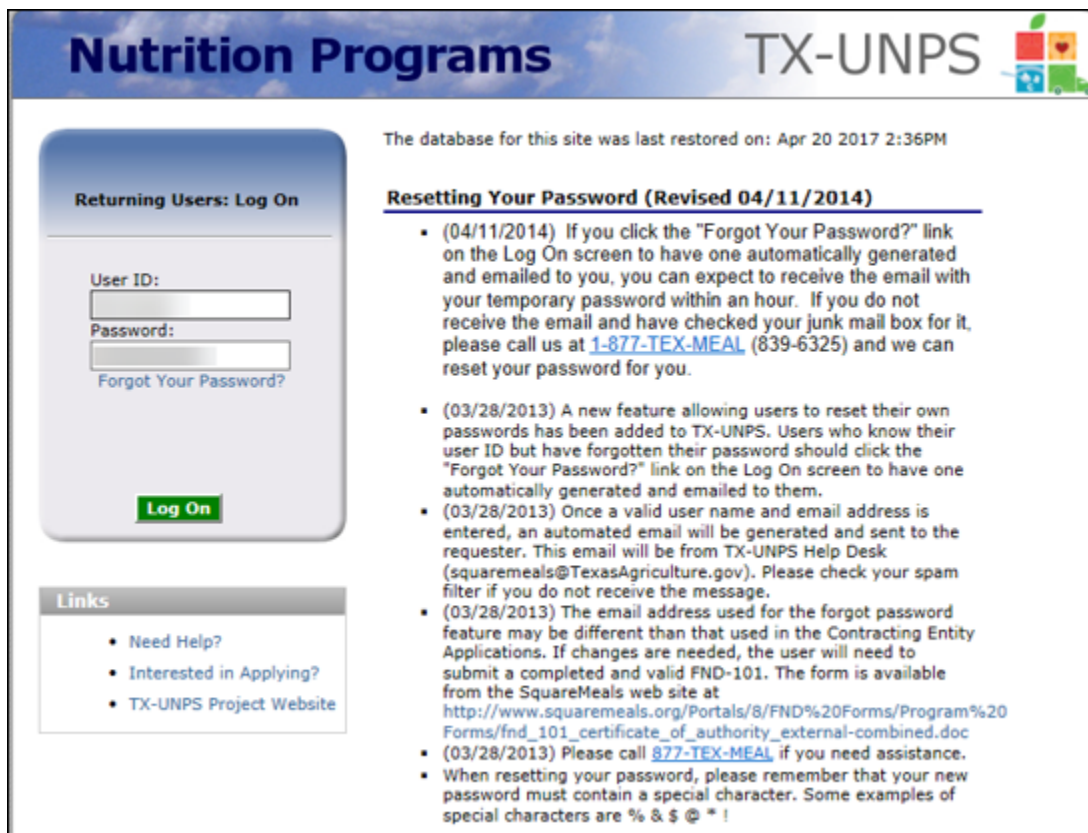
Before using the **Food Distribution Program (FDP)** module, a user ID and password must be assigned that provides the required security privileges. Once this setup is complete, the user may use the Internet, assigned user ID and password to access and log onto the website.

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>.



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.



Nutrition Programs TX-UNPS

The database for this site was last restored on: Apr 20 2017 2:36PM

Returning Users: Log On

User ID:

Password:

[Forgot Your Password?](#)

Log On

Resetting Your Password (Revised 04/11/2014)

- (04/11/2014) If you click the "Forgot Your Password?" link on the Log On screen to have one automatically generated and emailed to you, you can expect to receive the email with your temporary password within an hour. If you do not receive the email and have checked your junk mail box for it, please call us at [1-877-TEX-MEAL](tel:1-877-TEX-MEAL) (839-6325) and we can reset your password for you.
- (03/28/2013) A new feature allowing users to reset their own passwords has been added to TX-UNPS. Users who know their user ID but have forgotten their password should click the "Forgot Your Password?" link on the Log On screen to have one automatically generated and emailed to them.
- (03/28/2013) Once a valid user name and email address is entered, an automated email will be generated and sent to the requester. This email will be from TX-UNPS Help Desk (squaremeals@TexasAgriculture.gov). Please check your spam filter if you do not receive the message.
- (03/28/2013) The email address used for the forgot password feature may be different than that used in the Contracting Entity Applications. If changes are needed, the user will need to submit a completed and valid FND-101. The form is available from the SquareMeals web site at http://www.squaremeals.org/Portals/8/FND%20Forms/Program%20Forms/fnd_101_certificate_of_authority_external-combined.doc
- (03/28/2013) Please call [877-TEX-MEAL](tel:877-TEX-MEAL) if you need assistance.
- When resetting your password, please remember that your new password must contain a special character. Some examples of special characters are % & \$ @ * !

Links

- [Need Help?](#)
- [Interested in Applying?](#)
- [TX-UNPS Project Website](#)

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**.



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



Tip: The Accounting, Maintenance and Configuration, and Security tiles are always gray, because these are administrative modules with access available only to authorized State users.

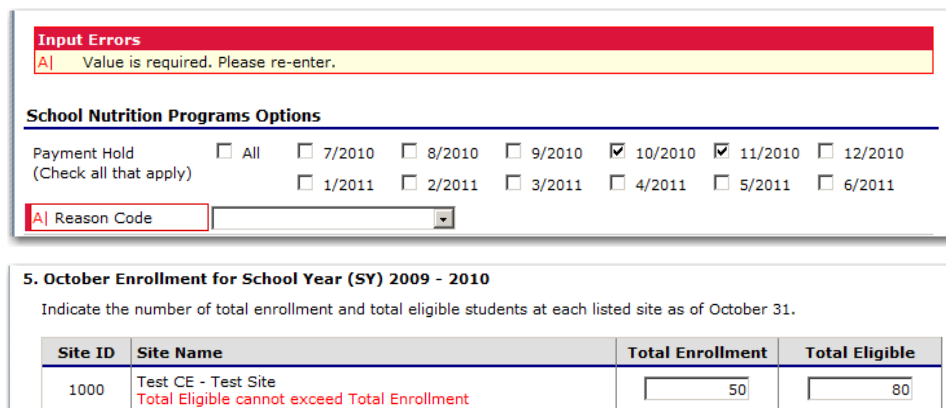
2.4 System Rules and Error Processing

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 not save data entered on a screen that contains an input error. The user must correct the input errors and select Save again.



Site ID	Site Name	Total Enrollment	Total Eligible
1000	Test CE - Test Site Total Eligible cannot exceed Total Enrollment	50	80

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 corrected 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.

Code	Error Description
18207	Must Indicate either Traditional SFSP or Seamless Summer Option.

Contact Information:

1. Name: Salutation: First Name: Last Name:

2. Email Address:

3. Phone: Ext: Fax:

4. Title:

Due Date: December 31, 2012

Summer Program Intention

5. Intends to offer 2011 summer meals through the following program:

- a. Traditional Summer Food Service Program (SFSP)
- b. Seamless Summer Option

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.

Code	Warning Description
001	The Application Packet is not considered complete until the prior year's Food Safety Inspection Report has been submitted.

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.



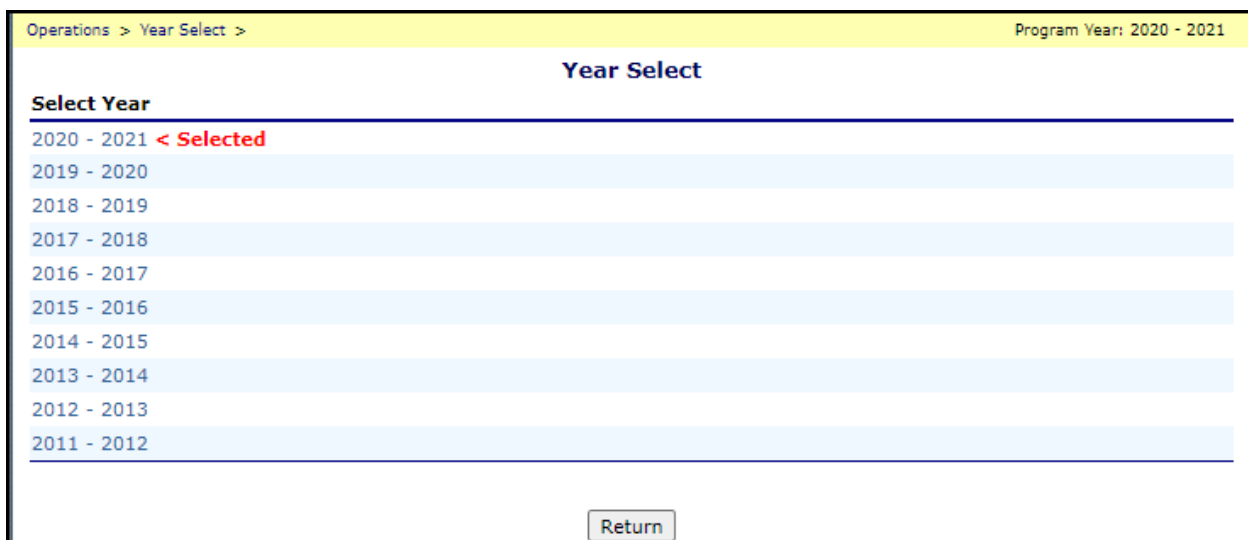
Please Note: A Contracting Entity will be unable to select and view any year, inclusive of current and past years, if they have been granted the security right to do so. Contact and request access to the Select Year security right if you think this is in error.

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.



The screenshot shows the 'Year Select' screen within a web application. At the top, there is a breadcrumb trail 'Operations > Year Select >' and the current 'Program Year: 2020 - 2021'. The main heading is 'Year Select'. Below this, there is a list of years from '2020 - 2021' down to '2011 - 2012'. The '2020 - 2021' option is highlighted in red and includes a red '< Selected' label. A 'Return' button is located at the bottom center of the screen.

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	<ul style="list-style-type: none"> Enables user to manage all Contracting Entity contract information
Contracts Rollover	<ul style="list-style-type: none"> Enables user to rollover contract data to new year
Update TLS	<ul style="list-style-type: none"> Enables user to import and update contract TLS from Contracting Entity Claims

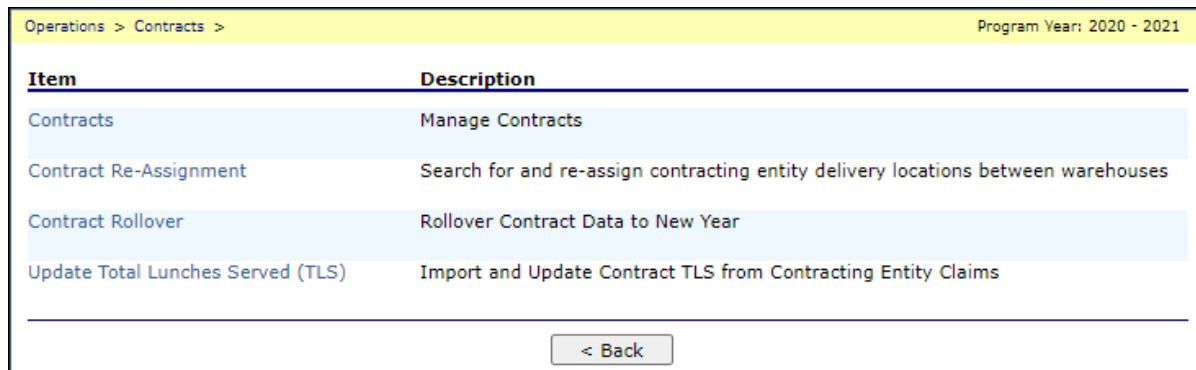


Figure 9: Contracts Menu Screen

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.

Operations > Contracts > Program Year:

Food Distribution Program (FDP) Contracts

Search Criteria

Program Year: <input type="text"/>	Contract Status: <input type="text"/>
Program: <input type="text" value="NSLP"/>	Packet Status: <input type="text"/>
Contracting Entity: <input type="text"/>	Contract Consultant: <input type="text"/>
Warehouse: <input type="text"/>	CE ID: <input type="text"/>

Contracts

CE ID	Agency Name	Agency Type	Packet Status	Contract Status	Contract Consultant
00260		Recipient Contracting Entity	Approved	Approved	
00261		Recipient Contracting Entity	Approved	Approved	
00255		Recipient Contracting Entity	Approved	Approved	

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.

The screenshot shows a web interface for 'Food Distribution Program (FDP) Contracts'. At the top, there is a breadcrumb 'Operations > Contracts >' and a 'Program Year:' field. The main title is 'Food Distribution Program (FDP) Contracts'. Below this is a 'Search Criteria' section with several dropdown menus: 'Program Year', 'Program' (set to 'NSLP'), 'Contracting Entity', 'Warehouse', 'Contract Status', 'Packet Status', 'Contract Consultant', and 'CE ID'. At the bottom of the search criteria section, there are three buttons: 'Display Contracts', 'New Contract' (highlighted with a red box), and 'Cancel'.

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 >>**.

The screenshot shows the 'Food Distribution Program - New Contract' screen. At the top, there is a breadcrumb 'Operations > Contracts >' and a 'Program Year:' field with an 'ADD' button. The main title is 'Food Distribution Program - New Contract'. Below this is a 'New Contract Information' section with three dropdown menus: 'Program' (set to 'NSLP'), 'Program Year', and 'Contracting Entity' (set to 'BOYS & GIRLS CLUBS OF SOUTH CENTRAL TEXAS'). At the bottom of the form, there are two buttons: '< Back' and 'Continue >>' (highlighted with a red box).

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.).

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

**Food Distribution Program Contract Packet - NSLP
2020-2021**

Contracting Entity: CE ID: 00006	Packet Status: Submitted Packet Approved Date: Contract Status: Approved
--	---

Action	Form Name	Status
View Modify	FDP Contract	
View Modify	✓ Contracting Entity Information Update	Certified
View Modify Admin	✓ Checklist	Approved
Contacts:		
	Food Service Director:	Certified
View Modify	✓ [Redacted]	
View Modify	✓ Ordering Contact:	Certified
	[Redacted]	
View Modify	✓ Billing Contact:	Certified
	[Redacted]	
Delivery Locations:		
Add/Remove Location		
View Modify	[Redacted]	
View Modify	[Redacted]	
View Modify	[Redacted]	
View Modify	[Redacted]	
Notes (0)		
View Modify		

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**.

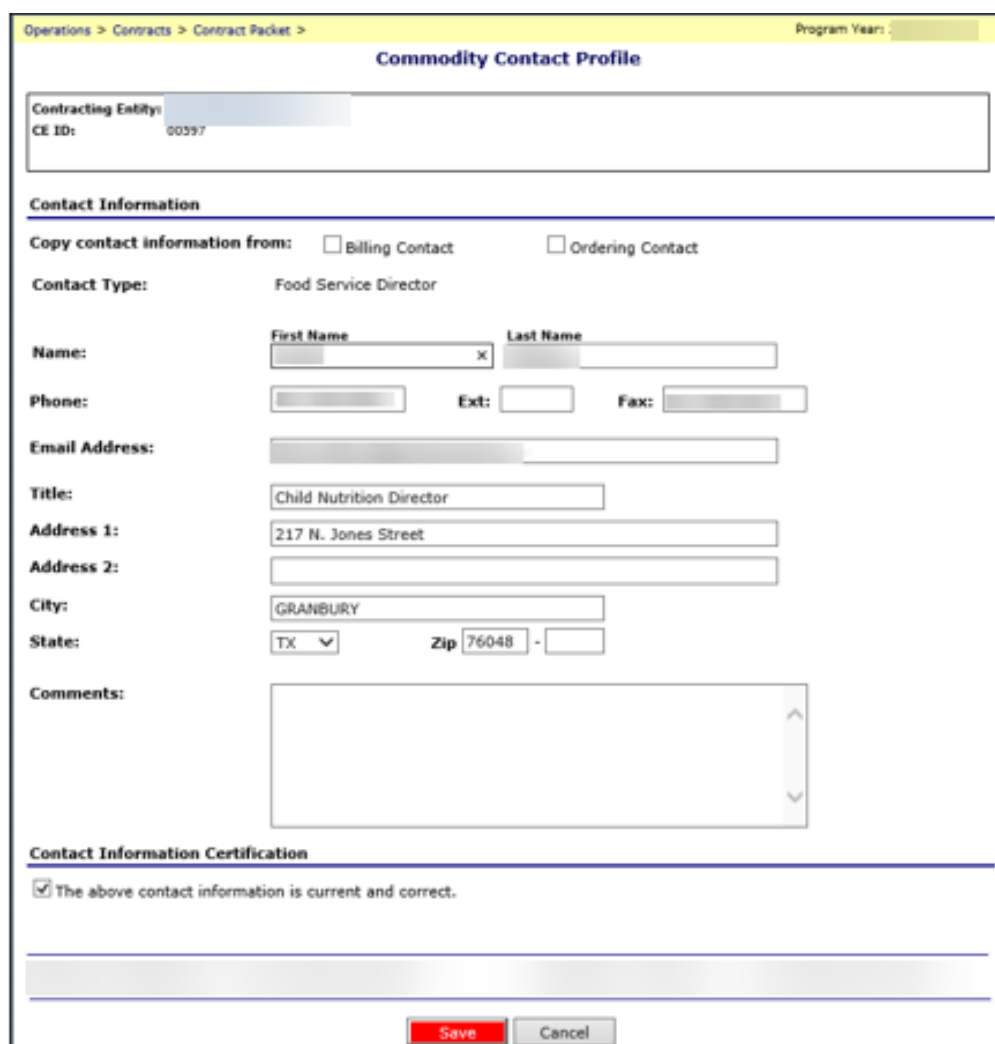


Figure 15: Commodity Contact Profile Screen

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**.

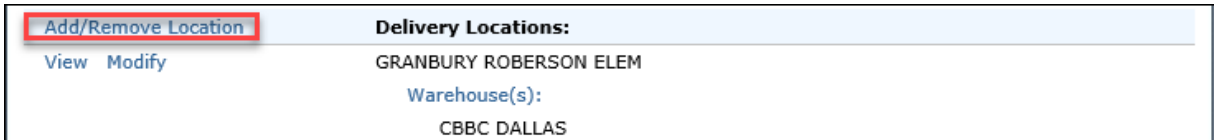


Figure 16: Add/Remove Delivery Location Selection

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**.

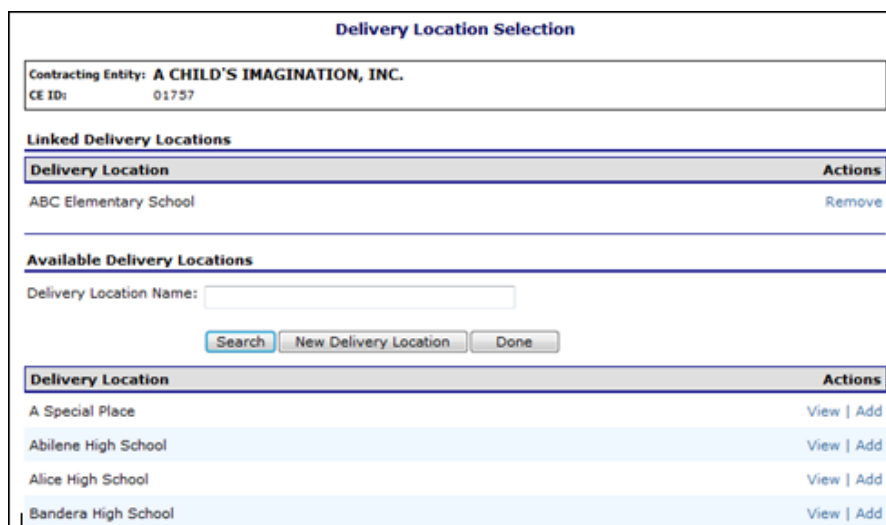


Figure 17: Delivery Location Screen

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**.



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.

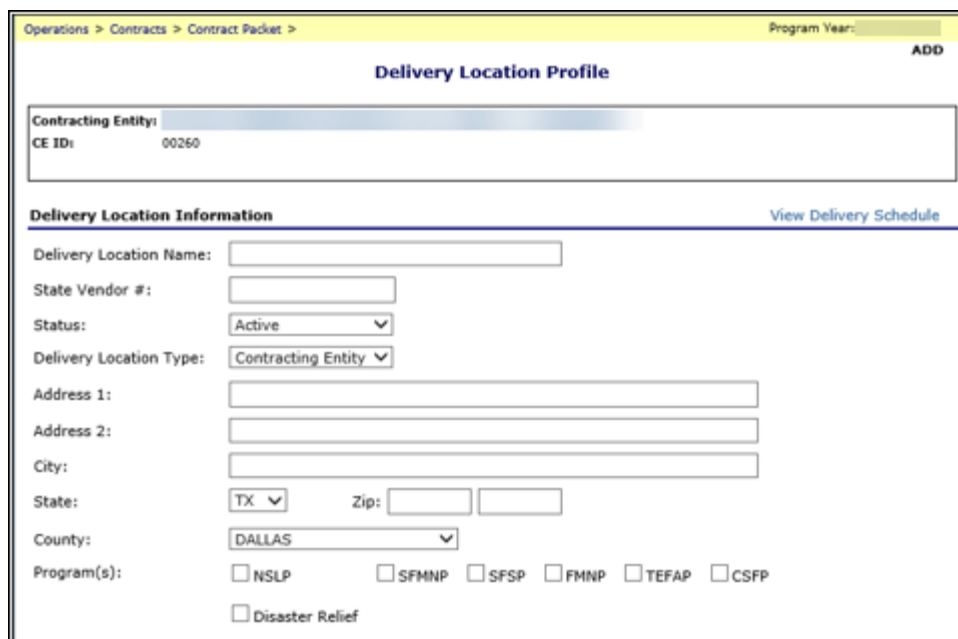


Figure 18: Delivery Location Profile Screen (Partial)

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.

Add/Remove Location		Delivery Locations:	
View	Modify	GROVETON ELEMENTARY	
		Warehouse(s):	
		HOUSTON FOOD BANK	
View	Modify	Notes (0)	
<input type="button" value=" < Back"/> <input type="button" value=" Submit For Approval"/> <input type="button" value=" Withdraw Packet"/> <input type="button" value=" Terminate Contract"/>			
<input type="button" value=" Approve"/> <input type="button" value=" Return for Correction"/>			

Figure 19: Contract Notes Modify Selection

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

Operations > Contracts > Contract Packet >			Program Year: 2020 - 2021
Contract Notes - NSLP 2020 - 2021			
Contracting Entity: <input type="text"/>			
CE ID:	00006		
Date	Created By	Note Summary	
11/12/2020	Developer	Conference call to discuss delivery expectations.	
<input type="button" value=" < Back"/> <input type="button" value=" Create New Contract Note"/>			

Figure 20: Contract Notes

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

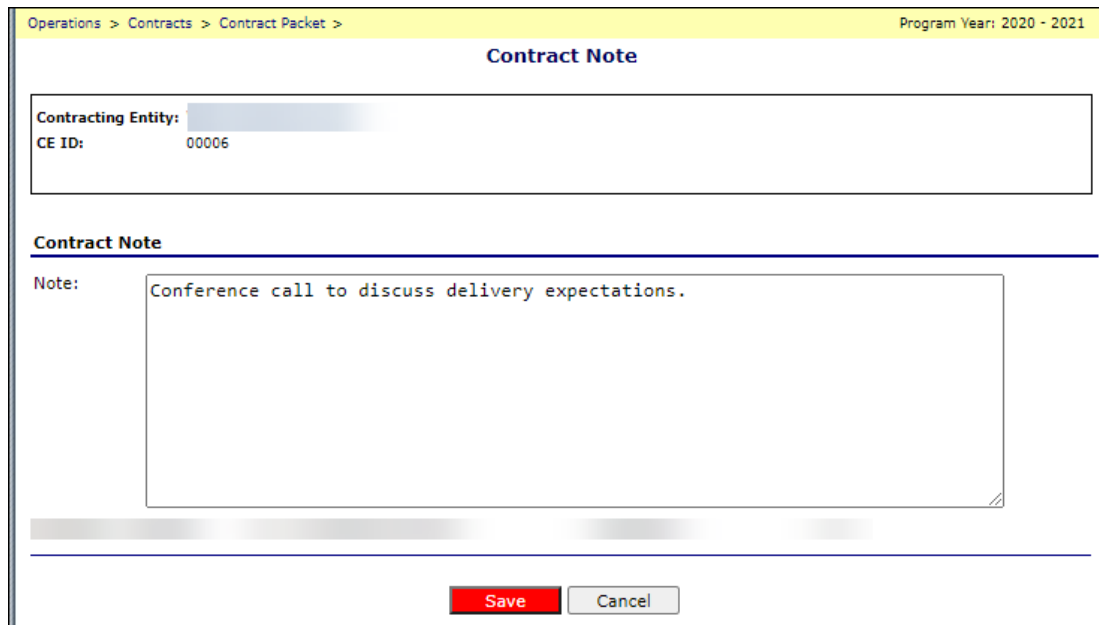


Figure 21: Contract Notes - View/Modify Screen

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

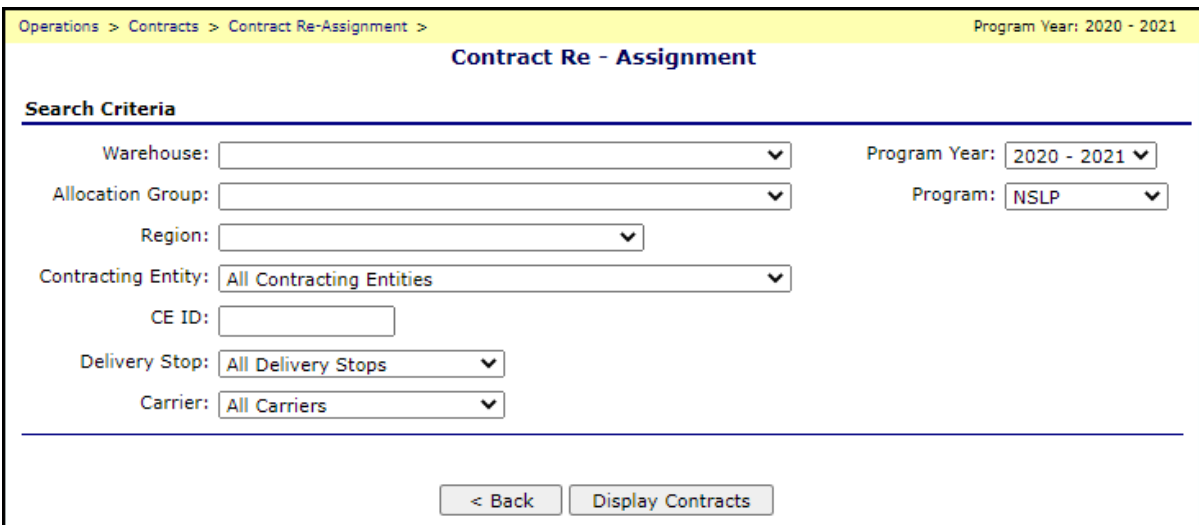
1. Access the **Food Distribution Program Contract** screen.
2. Select **Reopen Contract**.

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 Contracts** button.



The screenshot shows the 'Contract Re - Assignment' screen. At the top, there is a breadcrumb trail: 'Operations > Contracts > Contract Re-Assignment >'. The page title is 'Contract Re - Assignment' and the 'Program Year' is set to '2020 - 2021'. Below the title is a 'Search Criteria' section with several fields: 'Warehouse' (dropdown), 'Allocation Group' (dropdown), 'Region' (dropdown), 'Contracting Entity' (dropdown, currently set to 'All Contracting Entities'), 'CE ID' (text input), 'Delivery Stop' (dropdown, currently set to 'All Delivery Stops'), and 'Carrier' (dropdown, currently set to 'All Carriers'). To the right of these fields are 'Program Year' (dropdown, set to '2020 - 2021') and 'Program' (dropdown, set to 'NSLP'). At the bottom of the form are two buttons: '< Back' and 'Display Contracts'.

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**.

Operations > Contracts > Contract Re-Assignment > 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
<input type="checkbox"/>	00452		US Food Service	Region 6
<input type="checkbox"/>	01034		US Food Service	Region 6
<input type="checkbox"/>	00880		US Food Service	Region 6
<input type="checkbox"/>	00918		US Food Service	Region 6
<input type="checkbox"/>	00710		US Food Service	Region 6
<input type="checkbox"/>	00008		US Food Service	Region 6
<input type="checkbox"/>	00672		US Food Service	Region 6
<input type="checkbox"/>	00591		US Food Service	Region 6
<input type="checkbox"/>	00017		US Food Service	Region 6
<input type="checkbox"/>	01005		US Food Service	Region 6
<input type="checkbox"/>	00148		US Food Service	Region 6
<input type="checkbox"/>	00946		US Food Service	Region 6

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 >>**.

Operations > Contracts > Contract Re-Assignment > Program Year: 2020 - 2021

Contract Re-Assignment

** This customer has activity for the selected year and Delivery Location. Changes will be applied to the following year.*

Program Year: 2020 - 2021
Program: NSLP

Re-Assignment Information

From		To
Allocation Group:	All Groups	Houston Food Bank
Region:	All Regions	Region 4
Warehouse:	US FOODS INC	No Change
Delivery Stop:	All Stops	No Change
Carrier:	All Carriers	No Change

Contracts Count: 146

CE ID	Contracting Entity	Delivery Location	Delivery Stop	Carrier Name	Delivery Location Program
00008			Every Tuesday	US FOODS INC	NSLP
00672			Every Thursday	US FOODS INC	NSLP
00017			2nd Wednesday	US FOODS INC	NSLP
00148			Every Monday	US FOODS INC	NSLP
00946			Every Wednesday	US FOODS INC	NSLP
00612			Every Tuesday	US FOODS INC	NSLP
00132			3rd Wednesday	US FOODS INC	NSLP
00742			3rd Thursday	US FOODS INC	NSLP
00905			Every Wednesday	US FOODS INC	NSLP
00189			Every Wednesday	US FOODS INC	NSLP
00135			3rd Wednesday	US FOODS INC	NSLP

Figure 24: Revised Contract Re-Assignment Screen

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

00134	ZEPHYR ISD	Houston Food Bank	Region 4	PLAIN	3rd Wednesday	US FOODS INC
-------	------------	-------------------	----------	-------	---------------	--------------

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**.



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)**.

Operations > Contracts > Update Contract TLS > Program Year: 2020 - 2021

Update Contract TLS (Total Lunches Served (TLS))

Update Criteria

Contract Program Year:

Contract Program:

Based on NSLP Claim Months: through

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).

TLS Calculation Results				
CE ID	Contracting Entity	Status	Current TLS	New TLS
00260		Approved	208,155	167,947
00261		Approved	197,169	168,122
00255		Approved	203,300	122,525
00579		Approved	17,605	13,651
00452		Approved	56,192	53,616
01034		Approved	1,845,542	1,389,899
00043		Approved	130,562	93,442

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.

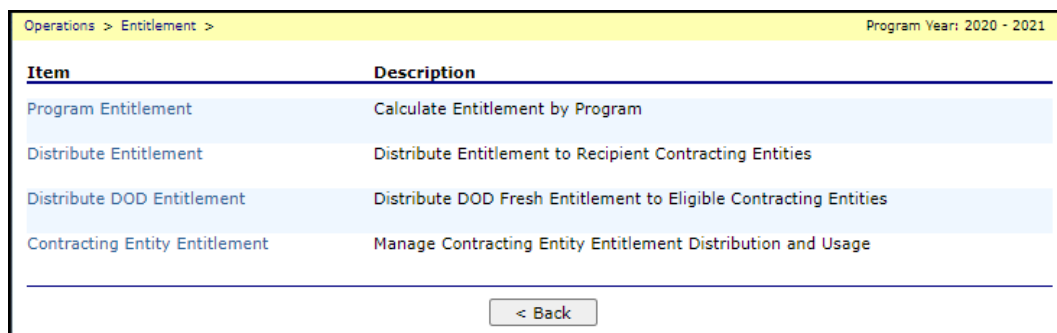
Item	Description
Program Entitlement	<ul style="list-style-type: none"> Enables user to calculate the state's entitlement by program
Distribute Entitlement	<ul style="list-style-type: none"> Enables user to distribute entitlement to Contracting Entities
Distribute DOD Entitlement	<ul style="list-style-type: none"> Enables user to distribute DOD entitlement to participating Contracting Entities
Contracting Entity Entitlement	<ul style="list-style-type: none"> 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.



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

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.

Operations > Entitlement > Program Entitlement > Program Year: 2020 - 2021

Program Entitlement

Program	Current Year Entitlement	Rollover Entitlement	Total Entitlement	Distributed Entitlement	Remaining Entitlement	Minimum Entitlement
NSLP	\$750,000,000	\$0	\$750,000,000	\$215,246,672	\$534,753,328	\$0
NSLP TM	\$0	\$0	\$0	\$0	\$0	\$0
SFSP TM	\$0	\$0	\$0	\$0	\$0	\$0
SFSP	\$0	\$0	\$0	\$0	\$0	\$0
TEFAP TM	\$0	\$0	\$0	\$0	\$0	\$0
TEFAP	\$0	\$0	\$0	\$0	\$0	\$0
CSFP	\$0	\$0	\$0	\$0	\$0	\$0
CSFP TM	\$0	\$0	\$0	\$0	\$0	\$0
SFMNP	\$0	\$0	\$0	\$0	\$0	\$0
FMNP	\$0	\$0	\$0	\$0	\$0	\$0
CARES	\$0	\$0	\$0	\$0	\$0	\$0
FFCRA	\$0	\$0	\$0	\$0	\$0	\$0
Disaster Relief	\$0	\$0	\$0	\$0	\$0	\$0
Totals	\$750,000,000	\$0	\$750,000,000	\$215,246,672	\$534,753,328	

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Figure 30: Program Entitlement Screen

3. Select **Calculate New Entitlement**.

Operations > Entitlement > Program Entitlement > Program Entitlement History > Program Year: 2020 - 2021

Program Entitlement History - NSLP

Current Year Entitlement	Rollover Entitlement	Total Entitlement	Distributed Entitlement	Remaining Entitlement	Minimum Entitlement	Date
\$750,000,000.00	\$0.00	\$750,000,000.00	\$215,216,671.55	\$534,783,328.45	\$0.00	11/09/2020
\$0.00	\$0.00	\$0.00	\$215,216,671.55	\$0.00	\$0.00	11/04/2020
\$216,073,685.00	\$0.00	\$216,073,685.00	\$215,237,213.45	\$836,471.55	\$0.00	08/04/2020
\$215,246,779.00	\$0.00	\$215,246,779.00	\$0.00	\$215,246,779.00	\$0.00	01/17/2020

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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**.

Operations > Entitlement > Program Entitlement > Program Entitlement History > Program Year: 2017 - 2018

Calculate New Program Entitlement - NSLP

Current Year Entitlement \$190,209,097.82	Rollover Entitlement \$0.00	Distributed Entitlement \$190,209,097.82
--	--------------------------------	---

Program Entitlement Calculation

Total Reimbursable Lunches:	559,438,523	
x Per Meal Rate:	0.3400	
Calculated Entitlement (Active Contracts Only):	\$190,209,097.82	
+ Entitlement Used by Inactive Contracting Entities:	\$0.00	
Total Calculated Entitlement:	\$190,209,097.82	

Program Entitlement

New Current Year Entitlement:	\$190,209,097.82	
Rollover Entitlement:	\$0.00	
Minimum Entitlement:	\$0.00	

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.

Operations > Entitlement > Entitlement Distribution > Program Year: 2016 - 2017

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	

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.

Operations > Entitlement > Entitlement Distribution > Adjust Program Entitlement > Program Year: 2017 - 2018

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)

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.

Operations > Entitlement > Entitlement Distribution > Program Entitlement Detail > Program Year: 2017 - 2018

Entitlement Distribution Results - NSLP								
Current Distribution					New Distribution			
\$186,002,615.98					\$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.

DOD Fresh Entitlement Distribution		
Program	Current Distribution	Actions
CSFP	\$0.00	Distribute Entitlement Post Distribution
Disaster Relief	\$0.00	Distribute Entitlement Post Distribution
FMNP	\$0.00	Distribute Entitlement Post Distribution
NSLP	\$29,300,000.00	Distribute Entitlement Post Distribution
SFMNP	\$0.00	Distribute Entitlement Post Distribution
SFSP	\$0.00	Distribute Entitlement Post Distribution
TEFAP	\$0.00	Distribute Entitlement Post Distribution
Totals		

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.

DOD Fresh Distribution Calculation - NSLP		
State DOD Commitment:	<input type="text" value="\$32,000,000.00"/>	<input type="button" value="Update State Commitment Only"/>
Less - Farm to School Used:	<input type="text" value="\$1,183,594.00"/>	
Calculated DOD Fresh Distribution:	<input type="text" value="\$30,816,406.00"/>	
Minimum Distribution per Eligible Contracting Entity:	<input type="text" value="\$0.00"/>	
<input type="button" value="Calculate Distribution"/> <input type="button" value="Cancel"/>		

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	
<input checked="" type="radio"/> Display DOD Fresh Distribution <input type="radio"/> 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: ▾

Program: ▾

Contracting Entity: ▾

CE ID:

Allocation Group: ▾

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.

Program Distribution		Entitlement Used		Entitlement Remaining	
\$186,038,864.00		\$181,815,339.75		\$4,223,524.25	

CE ID	Contracting Entity Name	TLS	Status	CIL	Entitlement Distribution	Entitlement Used	Entitlement Remaining
00260	A PLUS CHARTER SCHOOLS, Inc. DBA A + ACADEMY	163,776	Approved	N	\$55,249.94	\$43,174.66	\$12,075.28
00261	A PLUS CHARTER SCHOOLS, INC. DBA INSPIRED VISION ACADEMY	170,628	Approved	N	\$57,561.47	\$48,727.68	\$8,833.79
00255	A.W. BROWN-FELLOWSHIP	232,597	Approved	N	\$78,466.75	\$70,260.46	\$8,206.29

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.

Operations > Entitlement > Distribution > Program Year: 2017 - 2018

Entitlement Distribution History - NSLP

Contracting Entity:			
CE ID: 00359			

Entitlement	Entitlement Used	Entitlement Remaining	
\$4,902.72	\$5,576.24	(\$673.52)	

Entitlement	Amount	Description/Adjustment	Date
\$0.00	\$0.00		
\$5,037.94	\$5,037.94	Program Distribution	01/11/2017
\$5,229.48	\$191.54	Program Distribution	01/13/2017
\$5,318.15	\$88.67	Program Distribution	08/01/2017
\$4,902.72	(\$415.43)	Program Distribution	11/09/2017

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.

Entitlement Usage - NSLP

Contracting Entity: HUCKABAY ISD			
CE ID: 00359			

Entitlement	Entitlement Used	Entitlement Remaining	
\$5,292.10	\$5,217.73	\$74.37	

Entitlement	Used	Description	Date
Beginning	\$5,292.10		
	\$5,023.92	\$268.18	Srvy2242
	\$4,683.00	\$340.92	Srvy2250
	\$4,301.36	\$381.64	Srvy2258
	\$4,210.50	\$90.86	Srvy2266
	\$3,794.14	\$416.36	Srvy2274
	\$2,587.50	\$1,206.64	DOD180001
	\$2,446.14	\$141.36	Prsv2345
	\$74.37	\$2,371.77	Prsv2347
Remaining	\$74.37		

Figure 42: Entitlement Usage Screen

- 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

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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

- Select **Contracting Entity Entitlement** from the Entitlement menu.
- Use the search criteria to select/search for a **Contracting Entity**.
- Select the **link** in the Entitlement Distribution column. The Entitlement Distribution History screen displays.
- Select **New Manual Adjustment**.
- 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**.

Entitlement Distribution Adjustment - NSLP ADD

Contracting Entity: **HUCKABAY ISD**
 CE ID: 00359

Entitlement	Entitlement Used	Entitlement Remaining
\$5,292.10	\$5,217.73	\$74.37

Adjustment Information

Adjustment Amount:

Adjustment Reason:

Created By: Developer
 Adjustment Date: 11/27/2017

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 **link** 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

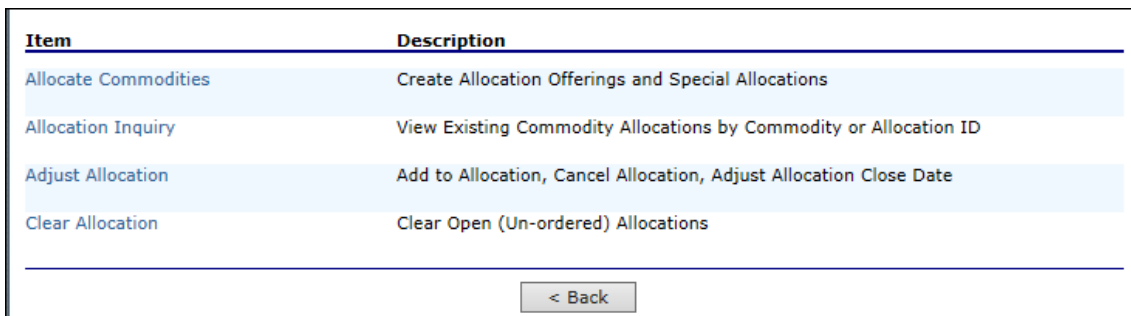
1. Select **Contracting Entity Entitlement** from the Entitlement menu.
2. Use the **search criteria** to select/search for a Contracting Entity.
4. Select the **link** in the Entitlement Distribution or Entitlement Used column.
5. Select the **link** for the Manual Adjustment. The Entitlement Distribution 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	<ul style="list-style-type: none"> Enables the user to create allocation offerings and special allocations
Allocation Inquiry	<ul style="list-style-type: none"> Enables the user to view existing commodity allocations
Adjust Allocation	<ul style="list-style-type: none"> Enables the user to adjust an allocation close date, add to, or cancel an allocation
Clear Allocation	<ul style="list-style-type: none"> 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.

Allocate Commodities				
Unposted Allocations				
Allocation Name	Warehouse	Allocation Date	Created By	Status
dfhsedrh	CENTRAL TEXAS FOOD BANK	07/26/2017	Developer	Processed

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**.

ADD

Allocation Offer - Criteria

Allocation Information

Program Year: Allocation Name:

Program: NSLP SFMNP SFSP FMNP
 TEFAP CSFP Disaster Relief Allocation Date:

Warehouse: Close Date:

Commodity Group:

Allocation Criteria

Use Annual Survey: Yes No

Include Contracting Entities On Hold: Yes No

Include Contracting Entities Over Entitlement: Yes No

Include Allocation Groups:

All Groups

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

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

Commodity Allocations

Item Number	Description	Program	Type	Charge Ent	Unallocated		Surplus	
					Available	Allocate	Available	Allocate
100258	Apple Sliced Frz - 30 lb ctn	NSLP	E	Yes ▼	8,921	<input type="text" value="130"/>	0	<input type="text" value="0"/>
100359	Beans, Black Turtle #10 - 6/#10 can	NSLP	E	Yes ▼	8,918	<input type="text" value="0"/>	9,600	<input type="text" value="0"/>
100362	Beans, Refried, Canned - 6/#10	NSLP	E	Yes ▼	937	<input type="text" value="0"/>	0	<input type="text" value="0"/>
100364	Beans, Vegetarian - 6/#10	NSLP	E	Yes ▼	3,523	<input type="text" value="210"/>	0	<input type="text" value="0"/>
P120	Beef Crumbles Cooked - 30 lb ctn	NSLP	E	Yes ▼	1,000	<input type="text" value="0"/>	0	<input type="text" value="0"/>
100010	Cheese Barrel 500 - 500 brl	NSLP	E	Yes ▼	1,050	<input type="text" value="0"/>	0	<input type="text" value="0"/>
100047	Eggs Whole Bulk for Diversion - BULK	NSLP	E	Yes ▼	9,880	<input type="text" value="0"/>	0	<input type="text" value="0"/>
MMAYZ99	MAMA SELITA'S RED GOLD JALAPENO KET - 3/5 lb	NSLP	E	Yes ▼	305	<input type="text" value="0"/>	0	<input type="text" value="0"/>
REDY572	RED GOLD KETCHUP FANCY 6/114 oz. Po - 3/5 lb	NSLP	E	Yes ▼	400	<input type="text" value="0"/>	0	<input type="text" value="0"/>
REDY59P	RED GOLD KETCHUP FANCY 6/114 oz. RE - 3/5 lb	NSLP	E	Yes ▼	300	<input type="text" value="0"/>	0	<input type="text" value="0"/>
REDY53G	RED GOLD Natural Ketchup made w/ Su - 3/5 lb	NSLP	E	Yes ▼	130	<input type="text" value="0"/>	0	<input type="text" value="0"/>

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**.

Allocation Offer – Allocation Calculation

Allocation Information

Allocation Name:	Offer 2	Program Year:	2011 - 2012
		Program(s):	NSLP
Warehouse:	State Distribution Center	Allocation Date:	01/12/2012
Commodity Group:	All Groups	Close Date:	01/23/2012
		Last Refusal Date:	01/22/2012

Allocation Criteria

Use Annual Survey:	No
Include Agencies On Hold:	No
Include Agencies Over Entitlement:	No
Allocation Groups:	Group 1, Group 2

Commodity Allocations

Item Number	Program	Commodity Description	Type	Charge Entitlement	Unallocated Units	Surplus Units	Total Allocation
100258	NSLP	Apple Sliced Frz - 30 lb ctn	E	Yes	130	0	130
100364	NSLP	Beans, Vegetarian - 6/#10	E	Yes	210	0	210

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.

VIEW

Post Allocation

Allocation Information

Allocation Name:	dfhsedrh	Program Year:	2017 - 2018
		Program(s):	NSLP
Warehouse:	CENTRAL TEXAS FOOD BANK	Allocation Date:	07/26/2017
Commodity Group:	All Groups	Close Date:	07/26/2017

Allocation Criteria

Use Annual Survey:	No
Include Agencies On Hold:	No
Include Agencies Over Entitlement:	No
Allocation Groups:	Dees Food Service, Direct Ship Schools, Houston Food Bank, Food Bank RGV, CBBC Dallas, San Antonio Food Bank, Tejas Coop-(LABATT), US Food Service, Central Texas Food Bank, Food Bank Group, FMNP/SFMNP

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.

Allocation Results - Commodity Detail						VIEW
Allocation Information						
Allocation Name:	dfhsedrh	Program Year:	2017 - 2018			
Warehouse:	CENTRAL TEXAS FOOD BANK	Program(s):	NSLP			
Commodity Group:	All Groups	Allocation Date:	07/26/2017			
Commodity:	Mixed Fruit Can PROC - Bulk	Close Date:	07/26/2017			
CE ID	Contracting Entity	Allocation TLS	Units Allocated	Unit Value	Total Value	
00030	MEDINA ISD	29,531	2	\$0.61	\$1.22	
00031	BANDERA ISD	224,481	16	\$0.61	\$9.76	
00032	BASTROP ISD	1,146,174	82	\$0.61	\$50.02	
00033	ELGIN ISD	516,865	37	\$0.61	\$22.57	

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**.

Allocation Results - Agency Summary						VIEW
Allocation Information						
Allocation Name:	dfhsedrh	Program Year:	2017 - 2018			
Warehouse:	CENTRAL TEXAS FOOD BANK	Program(s):	NSLP			
Commodity Group:	All Groups	Allocation Date:	07/26/2017			
		Close Date:	07/26/2017			
CE ID	Contracting Entity	Total Units	Total Value			
00043	ACADEMY ISD	9	\$5.49			
04199	AUSTIN ACHIEVE PUBLIC SCHOOLS, INC.	5	\$3.05			
01398	AUSTIN CHILDREN'S SHELTER	1	\$0.61			
00031	BANDERA ISD	16	\$9.76			

Figure 52: Allocation Results – Commodity Summary Screen

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

Allocation Results - Agency Detail							VIEW
Allocation Information							
Allocation Name:	dfhsedrh	Program Year:	2017 - 2018	Program(s):	NSLP		
Warehouse:	CENTRAL TEXAS FOOD BANK	Allocation Date:	07/26/2017	Close Date:	07/26/2017		
Commodity Group:	All Groups						
Contracting Entity:	BANDERA ISD - 00031						
Item Number	Commodity Description	Type	Charge Entitlement	Allocation TLS	Units Allocated	Unit Value	Total Value
200212	Mixed Fruit Can-6/10 PROC - Bulk	B	No	224,481	16	\$0.61	\$9.76
					16		\$9.76

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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**.

ADD

Allocation Offer - Criteria

Allocation Information

Program Year: Allocation Name:

Program: NSLP SFMNP SFSP FMNP
 TEFAP CSFP Disaster Relief Allocation Date:

Warehouse: Close Date:

Commodity Group:

Allocation Criteria

Use Annual Survey: Yes No

Include Contracting Entities On Hold: Yes No

Include Contracting Entities Over Entitlement: Yes No

Include Allocation Groups:

<input type="checkbox"/> All Groups	<input type="checkbox"/> CBBC Dallas	<input type="checkbox"/> Central Texas Food Bank	<input type="checkbox"/> Dees Food Service
<input type="checkbox"/> Direct Ship Schools	<input type="checkbox"/> FMNP/SFMP	<input type="checkbox"/> Food Bank Group	
<input type="checkbox"/> Food Bank RGV	<input type="checkbox"/> Houston Food Bank	<input type="checkbox"/> San Antonio Food Bank	
<input type="checkbox"/> Tejas Coop-(LABATT)	<input type="checkbox"/> US Food Service		

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**.

ADD

Special Allocation

Allocation Information

Program Year: Allocation Name:

Program: Allocation Date:

Warehouse: Close Date:

Comments

Commodity Allocations

CE ID	Commodity	Commodity Type	Charge Entitlement	Unallocated Qty	Surplus Qty
<input type="text"/>	<input type="text"/>	<input type="text" value="Entitlement"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="Entitlement"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="Entitlement"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="Entitlement"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="Entitlement"/>	<input type="text" value="Yes"/>	<input type="text"/>	<input type="text"/>

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**.

ADD

Special Allocation

Allocation Information

Program Year: 2011 - 2012 Allocation Name: Spec Alloc 1

Program: NSLP Allocation Date: 01/12/2012

Warehouse: State Distribution Center Close Date: 01/21/2012

Commodity Allocations

CE ID	Commodity	Commodity Type	Charge Entitlement	Unallocated Qty	Surplus Qty
00255	Apple Sliced Frz-100258	Entitlement	Yes	50	0

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**.

The screenshot shows the 'Allocation Inquiry' screen with the following fields and options:

- Search Criteria:**
 - Program Year: 2017 - 2018 (dropdown)
 - Program: NSLP (dropdown)
 - Warehouse: All Warehouses (dropdown)
 - Allocation Type: All (dropdown)
 - Allocation Name (Optional): [text input]
 - Commodity (Optional): [dropdown]
 - Item Number (Optional): [text input]
 - Contracting Entity (Optional): All Contracting Entities (dropdown)
 - CE ID (Optional): [text input]
 - Allocation Date Range (Optional): From: [calendar icon] To: [calendar icon]
 - Include: Only Open Allocations All Allocations
- Display Criteria:**
 - Display Allocations By: Allocation Name Commodity

Buttons: Cancel, Display Allocations

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.

VIEW

Allocation Inquiry - Allocations

Allocation Information

Program Year:	2017 - 2018	Allocation Type:	All
Program:	NSLP	Allocation Name:	All
Warehouse:	All Warehouses	Date Range:	All Dates
Commodity:	All	Display:	All Allocations
Contracting Entity:	All		

Allocation Name	Contracting Entity	Region	Date Allocated	Quantity Allocated	Quantity Remaining
18 DS SA11	SAN ANTONIO ISD	Region 4	06/07/2017	1000	0
SURP116780	IDEA Academy Austin - FDP	Region 4	07/20/2017	20	0
SURP116781	IDEA Academy Austin - FDP	Region 4	07/20/2017	50	0
SURP116782	IDEA Academy Austin - FDP	Region 4	07/20/2017	500	0
SURP116783	IDEA Academy Austin - FDP	Region 4	07/20/2017	200	0
SURP116784	IDEA Academy Austin - FDP	Region 4	07/20/2017	300	0
Totals				2,070	0

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**.

Adjust Allocation

Adjustment Type:

Search Criteria

Program Year:	<input type="button" value=" 2017 - 2018 v"/>	Allocation Name:	<input type="text"/>
Program:	<input type="button" value=" NSLP v"/>	Allocation Group:	<input type="button" value=" All Groups v"/>
Item Number:	<input type="text"/>	CE ID:	<input type="text"/>
Commodity Type:	<input type="button" value=" All Types v"/>	Rows Per Page:	<input type="text" value=" 100"/>
Warehouse:	<input type="button" value=" All Warehouses v"/>		

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:

Comments:

Allocations Showing Allocations 1 through 60 of 60

Allocation	Commodity	Type	Group	Program	Year	Close Date	Qty Available
CE ID	Contracting Entity						
DOD180001			US Food Service	NSLP	2018	02/08/2017	
00029	MULESHOE ISD						0
							Add Units: <input type="text"/>
DOD180001			US Food Service	NSLP	2018	02/08/2017	
00036	SEYMOUR ISD						0
							Add Units: <input type="text"/>

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**.

Cancel Allocation

Allocation Information

Program: NSLP	Program Year: 2013 - 2014	Allocation Name: All	
Item Number: All	Group: All	CE ID: All	
Warehouse: All		Contracting Entity: All	

Units to Cancel:

Cancel the amounts entered for each Contracting Entity in Cancel Units box(es) below.
 Cancel all available units
 Cancel the following units from all allocations:

Cancel Units:

Comments:

Allocations Showing Allocations 1 through 100 of 14,958

Allocation	Commodity	Type	Group	Program	Year	Close Date
CE ID	Contracting Entity					Qty Available
100313 MAUD ISD	1-16-530-0 - Flamebroiled Beef Salisbury Steak w	Entitlement	CBBC GP	NSLP	2014	10/03/2013
00105	MAUD ISD					2
Adjust Entitlement? <input type="radio"/> Yes <input checked="" type="radio"/> No		Cancel Units: <input type="text"/>				
101413 ARROW AC	100003 - CHEESE CHED YEL SHRED BAG-6/5 LB	Entitlement	Glazier Food Company	NSLP	2014	10/14/2013
01659	ARROW ACADEMY-LEADERSHIP EDUCATION FOUNDATION					1
Adjust Entitlement? <input type="radio"/> Yes <input checked="" type="radio"/> No		Cancel Units: <input type="text"/>				
101413 ARROW AC	100012 - CHEESE CHED RDU FAT YEL SHRED BAG-6	Entitlement	Glazier Food Company	NSLP	2014	10/14/2013
01659	ARROW ACADEMY-LEADERSHIP EDUCATION FOUNDATION					1
Adjust Entitlement? <input type="radio"/> Yes <input checked="" type="radio"/> No		Cancel Units: <input type="text"/>				

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**.

ADD

Adjust Close Date

Allocation Information

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

Dates to Adjust:

Adjust the Close Dates as entered in the list below
 Assign the following Close Date to all allocations listed:

New Close Date:

Comments:

Allocations Showing Allocations 1 through 100 of 682

Allocation	Commodity	Type	Group	Program	Year	Close Date
CE ID	Contracting Entity					Qty Available
18 DS SA11	110361 - APPLESAUCE CUP 96/4.5 OZ.-SHELF STB	Entitlement	Direct Ship Schools	NSLP	2018	06/07/2017
00082	SAN ANTONIO ISD					0
						New Close Date: <input type="text"/>
DOD180001			CBBC Dallas	NSLP	2018	02/08/2017
00001	CAYUGA ISD					0
						New Close Date: <input type="text"/>

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**.

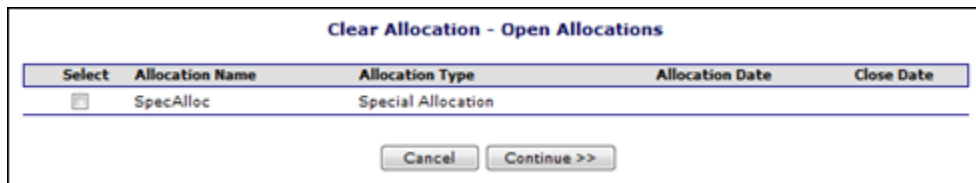


Figure 33: Clear Allocation – Open Allocation Screen

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.

Contracting Entity Orders	
Item	Description
Process Orders	Process Contracting Entity Orders
Adjust Contracting Entity Orders	Remove Commodities from Contracting Entity Orders
Contracting Entity Order Inquiry	View and Manage 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**.

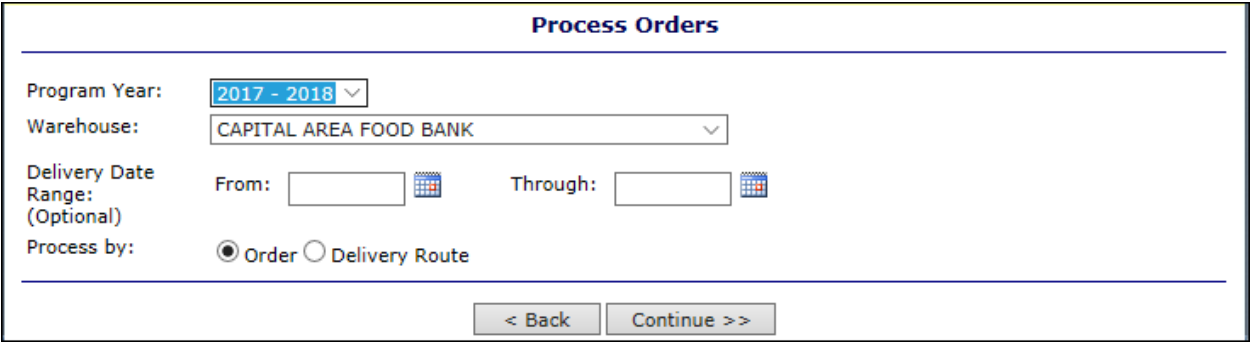


Figure 66: Process Orders - NSLP Screen

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 >>**.

Process Orders - Batch

Batch Information

Program Year: 2013 - 2014
Warehouse: DEES FOOD SERVICE

Select the Order(s) you wish to include in this batch.
 Check / Uncheck all

Select	Order #	Delivery Date	Contracting Entity	Delivery Location	Total Units	Total Weight
<input type="checkbox"/>	29426	11/04/2013	CLINT ISD	HORIZON HIGH SCHOOL	13	427
<input type="checkbox"/>	29417	11/04/2013	CLINT ISD	MOUNTAIN VIEW HIGH	13	427
<input type="checkbox"/>	29424	11/04/2013	CLINT ISD	RED SAND SCHOOL	23	891
<input type="checkbox"/>	29428	11/05/2013	CLINT ISD	CARROLL T. WELCH	23	891
<input type="checkbox"/>	29430	11/05/2013	CLINT ISD	DESERT HILLS	23	891
<input type="checkbox"/>	29431	11/05/2013	CLINT ISD	FRANK MACIAS ELEMENTARY	23	891
<input type="checkbox"/>	29427	11/05/2013	CLINT ISD	HORIZON MIDDLE SCHOOL	13	427
<input type="checkbox"/>	29415	11/05/2013	LYDIA PATTERSON INSTITUTE	LYDIA PATTERSON INSTITUTE	48	1,819
<input type="checkbox"/>	29368	11/05/2013	SAN ELIZARIO ISD	ALARCON ELEMENTARY	115	3,828
<input type="checkbox"/>	29432	11/06/2013	CLINT ISD	CLINT HIGH SCHOOL	13	427
<input type="checkbox"/>	29433	11/06/2013	CLINT ISD	CLINT JUNIOR HIGH	8	299
<input type="checkbox"/>	29434	11/06/2013	CLINT ISD	RICARDO ESTRADA JR HIGH	10	328
<input type="checkbox"/>	29435	11/06/2013	CLINT ISD	WILLIAM SURRATT SCHOOL	20	793
<input type="checkbox"/>	29365	11/07/2013	FABENS ISD	O DONNELL MIDDLE	244	9,471
<input type="checkbox"/>	29298	11/11/2013	BALMORHEA ISD	BALMORHEA ISD	9	361
<input type="checkbox"/>	28732	11/11/2013	CROCKETT CO CONS ISD	CROCKETT COUNTY CISD	41	1,097
<input type="checkbox"/>	28014	11/11/2013	NUECES CANYON CONS ISD	NUECES CANYON CISD	21	675
<input type="checkbox"/>	27844	11/11/2013	PRESIDIO ISD	PRESIDIO ISD	32	1,376
<input type="checkbox"/>	29026	11/11/2013	PRESIDIO ISD	PRESIDIO ISD	408	13,818
<input type="checkbox"/>	29362	11/18/2013	FT HANCOCK ISD	FT. HANCOCK ISD	16	610
Batch Totals					0	0

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

8. Select **Continue >>**.

Process Orders - Batch

Batch Information

Program Year: 2013 - 2014
Warehouse: DEES FOOD SERVICE

Select the Order(s) you wish to include in this batch.
 Check / Uncheck all

Select	Order #	Delivery Date	Contracting Entity	Delivery Location	Total Units	Total Weight
<input checked="" type="checkbox"/>	29426	11/04/2013	CLINT ISD	HORIZON HIGH SCHOOL	13	427
<input checked="" type="checkbox"/>	29417	11/04/2013	CLINT ISD	MOUNTAIN VIEW HIGH	13	427
Batch Totals					26	854

Figure 68: Process Orders – Open Delivery Periods Screen

Process Orders - Batch

Batch Information

Program Year: 2013 - 2014
Warehouse: DEES FOOD SERVICE

Select the Order(s) you wish to include in this batch.
 Check / Uncheck all

Select	Order #	Delivery Date	Contracting Entity	Delivery Location	Total Units	Total Weight
Delivery Route: 2nd Monday						
<input type="checkbox"/>	29298	11/11/2013	BALMORHEA ISD	BALMORHEA ISD	9	361
<input type="checkbox"/>	28732	11/11/2013	CROCKETT CO CONS ISD	CROCKETT COUNTY CISD	41	1,097
<input type="checkbox"/>	28014	11/11/2013	NUECES CANYON CONS ISD	NUECES CANYON CISD	21	675
<input type="checkbox"/>	27844	11/11/2013	PRESIDIO ISD	PRESIDIO ISD	32	1,376
<input type="checkbox"/>	29026	11/11/2013	PRESIDIO ISD	PRESIDIO ISD	408	13,818
Delivery Route: 3rd Monday						
<input type="checkbox"/>	29362	11/18/2013	FT HANCOCK ISD	FT. HANCOCK ISD	16	610
Delivery Route: Every Tuesday						
<input type="checkbox"/>	29415	11/05/2013	LYDIA PATTERSON INSTITUTE	LYDIA PATTERSON INSTITUTE	48	1,819
<input type="checkbox"/>	29368	11/05/2013	SAN ELIZARIO ISD	ALARCON ELEMENTARY	115	3,828
Delivery Route: Every Thursday						
<input type="checkbox"/>	29365	11/07/2013	FABENS ISD	O DONNELL MIDDLE	244	9,471
Delivery Route: Pick-up Monday						
<input type="checkbox"/>	29426	11/04/2013	CLINT ISD	HORIZON HIGH SCHOOL	13	427
<input type="checkbox"/>	29417	11/04/2013	CLINT ISD	MOUNTAIN VIEW HIGH	13	427
<input type="checkbox"/>	29424	11/04/2013	CLINT ISD	RED SAND SCHOOL	23	891
Delivery Route: Pick-up Tuesday						
<input type="checkbox"/>	29428	11/05/2013	CLINT ISD	CARROLL T. WELCH	23	891
<input type="checkbox"/>	29430	11/05/2013	CLINT ISD	DESERT HILLS	23	891
<input type="checkbox"/>	29431	11/05/2013	CLINT ISD	FRANK MACIAS ELEMENTARY	23	891
<input type="checkbox"/>	29427	11/05/2013	CLINT ISD	HORIZON MIDDLE SCHOOL	13	427
Delivery Route: Pick-up Wednesday						
<input type="checkbox"/>	29432	11/06/2013	CLINT ISD	CLINT HIGH SCHOOL	13	427
<input type="checkbox"/>	29433	11/06/2013	CLINT ISD	CLINT JUNIOR HIGH	8	299
<input type="checkbox"/>	29434	11/06/2013	CLINT ISD	RICARDO ESTRADA JR HIGH	10	328
<input type="checkbox"/>	29435	11/06/2013	CLINT ISD	WILLIAM SURRATT SCHOOL	20	793
Batch Totals					0	0

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**.

Adjust Contracting Entity Orders

Search Criteria

Program Year:

Program:

Warehouse:

Contracting Entity:

CE ID:

Commodity:

Delivery Date Range: (Optional) From: Through:

Order Status:

Sort By:

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.

Adjust Contracting Entity Order - NSLP

Order Criteria

Warehouse:	State Distribution Center	Program Year:	
Contracting Entity:	All Contracting Entities	Order Status:	Open
Delivery Date Range:	All Delivery Dates		
Commodity:	100258 - Apple Sliced Frz		

Commodity Orders

Order #	Contracting Entity	Delivery Location	Delivery Date	Allocation Order Qty
				<input type="button" value="Clear All"/>
1198	00255 _ A.W. BROWN-FELLOWSHIP	We Feed Houston		<input type="text" value="50"/>
			Totals:	50

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**.

Adjust Contracting Entity Orders

Search Criteria

Program Year:

Program:

Warehouse:

Contracting Entity:

CE ID:

Commodity:

Delivery Date Range: (Optional) From: Through:

Order Status:

Sort By:

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)



Please Note: Selecting the Order link displays the **Contracting Entity Order** form. Selecting the **Activity link** displays all activity for the order.

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	<ul style="list-style-type: none"> Enables you to verify the shipment of selected orders.
Shipment Receipt Adjustments	<ul style="list-style-type: none"> Enables you to adjust shipment verification.
Contracting Entity OS&D Reporting	<ul style="list-style-type: none"> Enables you to view Contracting Entity delivery verifications and OS&D resolutions.
Shipping Inquiry	<ul style="list-style-type: none"> 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.

Item	Description
Shipment Verifications	Verify Shipment of Selected Orders
Shipment Receipt Adjustments	Adjust Shipment Verification
Contracting Entity OS&D Reporting	View Contracting Entity Delivery Verifications and OS&D Resolutions
Shipping Inquiry	View Contracting Entity Shipment Information

Figure 75: Shipping Menu Screen

3.22 Shipping Verifications

The Shipment Verifications function enables you to 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.

Shipment Verification

Order Criteria:

Warehouse:

Delivery Date:

Batch #:

Order #:

Carrier:

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.

Shipping Verification

Warehouse: CENTRAL TEXAS FOOD BANK **Batch Number:** All Batches
Delivery Date: All Delivery Dates **Carrier:** All Carriers
Order Number: All Orders

Processed Orders

Check the batches / orders you wish to verify as shipped and click on Verify Orders. To adjust an order or modify batch information, click on the Order or Batch number link.

All Orders

Batch #	Order #	Contracting Entity	Delivery Location	Carrier	Delivery Date
<input type="checkbox"/> 16518	<input type="checkbox"/> 114852	00695 - JUNCTION ISD	JUNCTION I.S.D	CENTRAL TEXAS FOOD BANK	03/08/2017
<input type="checkbox"/> 16618	<input type="checkbox"/> 115223	01069 - PFLUGERVILLE ISD	DMS-DESSAU MIDDLE	CENTRAL TEXAS FOOD BANK	03/20/2017
16618	<input type="checkbox"/> 115235	01069 - PFLUGERVILLE ISD	CFE-COPPERFIELD ELEM	CENTRAL TEXAS FOOD BANK	03/20/2017
16618	<input type="checkbox"/> 115452	00030 - MEDINA ISD	MEDINA ISD CAFETERIA	CENTRAL TEXAS FOOD BANK	03/22/2017
16618	<input type="checkbox"/> 115453	00030 - MEDINA ISD	MEDINA ISD CAFETERIA	CENTRAL TEXAS	03/22/2017

Go to top

< Back
Verify Orders

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.

Shipment Verification

Order Criteria:

Warehouse:

Delivery Date:

Batch #:

Order #:

Carrier:

< Back
Display Orders

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**.

Shipping Verification

Warehouse: CENTRAL TEXAS FOOD BANK **Batch Number:** 16681
Delivery Date: 04/14/2017 **Carrier:** CENTRAL TEXAS FOOD BANK
Order Number: 115331

Processed Orders

Check the batches / orders you wish to verify as shipped and click on Verify Orders. To adjust an order or modify batch information, click on the Order or Batch number link.

All Orders

Batch #	Order #	Contracting Entity	Delivery Location	Carrier	Delivery Date
<input type="checkbox"/> 16681	<input type="checkbox"/> 115331	00716 - LOMETA ISD	LOMETA LOADING DOCK	CENTRAL TEXAS FOOD BANK	04/14/2017

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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**.

Shipment Verification Form

Batch Information

Order Number: 1016 **Batch Number:**
Vendor Number: 617900 **Delivery Date:**
Contracting Entity: WEST CONTRA COSTA UNIFIED SD **Carrier:** Steve Whaley
Delivery Location: WEST CONTRA COSTA USD

Order

Commodity	Extended Storage		Allocation		Total Ship Qty
	Order Qty	Ship Qty	Order Qty	Ship Qty	
100212 Fruit Mix 6/#10 6/#10 cans	0	<input type="text" value="0"/>	100	<input type="text" value="100"/>	100
110054 Peaches Cl Slc 6/#10 6/#10 can	0	<input type="text" value="0"/>	100	<input type="text" value="100"/>	100
110055 Pears Slc 6/#10 6/#10 can	0	<input type="text" value="0"/>	32	<input type="text" value="32"/>	32
100875 Milk UHT 1% 27/8 oz 27/8 oz ctn	0	<input type="text" value="0"/>	552	<input type="text" value="552"/>	552
Totals					784

Comments

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**.

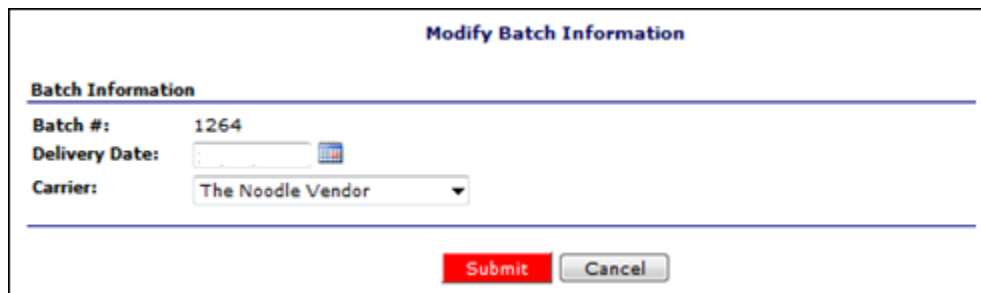


Figure 81: Modify Batch Information Screen

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**.

Shipment Receipt Adjustment

Shipment Selection

Order Number:

Figure 82: Shipping Receipt Adjustment Screen

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

Shipment Receipt Adjustment
State Distribution Center

Batch Information

Order Number:	1184	Batch Number:	4	<input type="button" value="Next Batch Number"/>
CE ID:	00255	Delivery Date:	<input type="text"/>	<input type="button" value="Calendar"/>
Agency:	A.W. BROWN-FELLOWSHIP	Carrier:	asdfasdf	
Delivery Location:	We Feed Houston			

Enter the number of undamaged units that were received. Report damaged units as Damaged Qty.

Order

Allocation

Comments

Commodity	Lot	Ship Qty	Received Qty	Total Received Qty	Damaged Qty
100359 Beans, Black Turtle 6/#10 can Beans, Black Turtle #10		3	<input style="width: 30px;" type="text" value="3"/>	3	<input style="width: 30px;" type="text" value="0"/>

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**:
 - Program Year
 - Program
 - Warehouse
 - Contracting Entity Name
 - CE ID
 - OS&D Report Status
 - Order Number (Optional)
 - 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:

Program:

Warehouse:

Contracting Entity Name:

CE ID:

OS&D Report Status:

Order Number: (Optional)

Delivery Date Range: (Optional) From: Through:

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

4. Select **Display Shipments**.

Overages, Shortages & Damages (OS&D) Reporting - NSLP				
Report Criteria				
Contracting Entity:	All Contracting Entities	Program Year:	2017 - 2018	
Order Number:	All Orders	Delivery Date Range:	All Delivery Dates	
Warehouse:	All Warehouses	OS&D Report Status:	All Reports	
Contracting Entity OS&D Reports				
Order Number	Contracting Entity	Delivery Location	Ship Date	Status
116778	SAN ANTONIO ISD	SAN ANTONIO ISD	06/07/2017	Not Reported
116780	IDEA Academy Austin - FDP	IDEA Allen	07/26/2017	Not Reported
116781	IDEA Academy Austin - FDP	IDEA Allen	07/26/2017	Not Reported
116782	IDEA Academy Austin - FDP	IDEA Allen	07/26/2017	Not Reported
116784	IDEA Academy Austin - FDP	IDEA Allen	07/26/2017	Not Reported
<input style="border: none; background-color: #cccccc; padding: 2px 10px;" type="button" value=" < Back "/>				

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

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

Overages, Shortages & Damages (OS&D) Reporting - NSLP				
Report Criteria				
Contracting Entity:	All Contracting Entities	Program Year:	2017 - 2018	
Order Number:	All Orders	Delivery Date Range:	All Delivery Dates	
Warehouse:	All Warehouses	OS&D Report Status:	All Reports	
Contracting Entity OS&D Reports				
Order Number	Contracting Entity	Delivery Location	Ship Date	Status
116778	SAN ANTONIO ISD	SAN ANTONIO ISD	06/07/2017	Not Reported
116780	IDEA Academy Austin - FDP	IDEA Allen	07/26/2017	Not Reported
116781	IDEA Academy Austin - FDP	IDEA Allen	07/26/2017	Not Reported
116782	IDEA Academy Austin - FDP	IDEA Allen	07/26/2017	Not Reported
116784	IDEA Academy Austin - FDP	IDEA Allen	07/26/2017	Not Reported
<input style="border: none; background-color: #cccccc; padding: 2px 10px;" type="button" value=" < Back "/>				

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**.

Operations > Shipping > Shipping Inquiry > Shipping Inquiry > Program Year: 2019 - 2020

Shipping Inquiry

Order Criteria

Warehouse: All Warehouses Program Year: 2019 - 2020
 Commodity: All Program: NSLP
 Delivery Date Range: N/A

Commodities

Order Number	Agency	Total Ordered Qty	Total Shipped Qty	Total Received Qty	Total Damaged Qty
12489		142	142	142	0
12537		496	204	204	0
12505		18	18	18	0

Figure 87: Shipping Inquiry Screen

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

Operations > Shipping > Shipping Inquiry > Shipping Inquiry > Agency Order #12482 > Program Year: 2019 - 2020 VIEW

Agency Order - NSLP

Order#: 12482 Batch Number: 2071
 Warehouse: Delivery Date: 09/30/2019
 Delivery Location: Carrier:

Order

Commodity	Total Ordered Qty	Total Shipped Qty	Total Received Qty	Total Damaged Qty
Apple Slices Canned - 100206	9	7	7	0
Applesauce Cup 96/4.5 - 110361	4	4	4	0
Beans, Red Kidney, Canned - 100370	2	2	2	0
Beef, Fine Grind Raw - 100158	6	6	6	0
Cheese, Mozz String Cheese LMPS - 110396	6	6	6	0
Cheese, Process Sliced Yellow - 100018	4	4	4	0
Chicken, Fajita Dark Ckd - 100117	10	8	8	0
Chicken, Strips Frozen 30 lb - 110462	6	6	6	0
Cranberries, Dried, Ind. 300/1.16oz - 110723	7	7	7	0
Egg Patty Round Fzn 25 lb ctn - 110931	4	4	4	0
Peaches, Cling, Sliced - 100219	1	1	1	0
Tomato Sauce - 100334	2	2	2	0
Tomato, Salsa - 100330	6	6	6	0
Totals:	67	63	63	0

Comments:

[< Back](#)

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	<ul style="list-style-type: none"> Enables you to create a survey
Modify Survey	<ul style="list-style-type: none"> Enables you to modify a survey
Create Annual Survey Orders	<ul style="list-style-type: none"> Enables you to convert requests into truckload units for ordering
Process Hold/Recall Survey	<ul style="list-style-type: none"> Enables you to view survey results and/or restore entitlement for recalled commodities
Survey Notifications	<ul style="list-style-type: none"> Enables you to generate survey notifications
Survey Load Balancing	<ul style="list-style-type: none"> Enables you to access survey load balancing worksheets
Process Survey	<ul style="list-style-type: none"> Enables you to fill survey requests
Process Diversions	<ul style="list-style-type: none"> 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

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:

Program:

Survey Type:

Survey Name:

Processing Co-op:

Ship Type:

Survey Date:

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:

Commodity Class:

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.

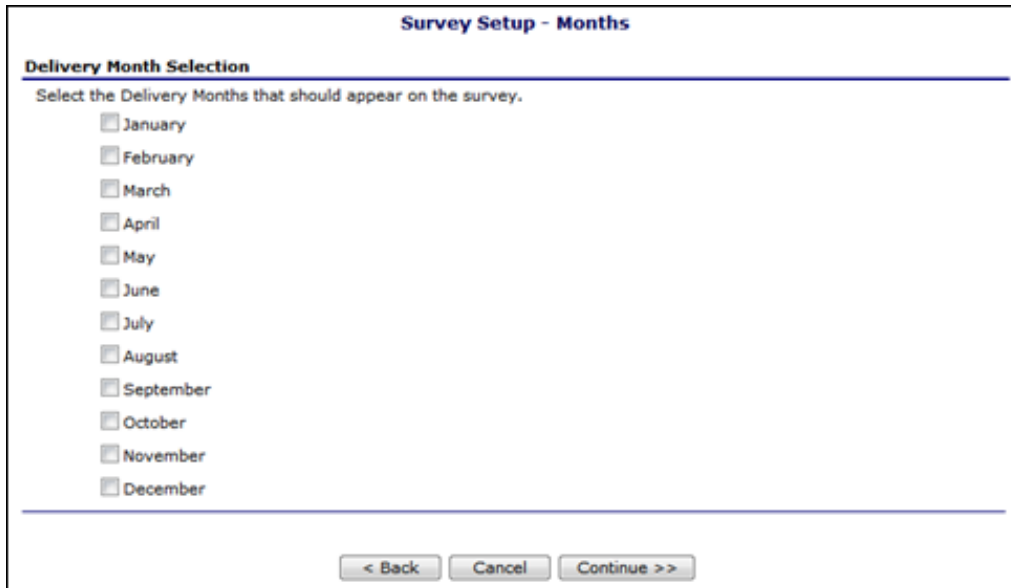


Figure 91: Survey Setup – Months (Periodic) Screen

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:

Program:

Survey Type:

Survey Status:

Survey Name:

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	<input type="button" value="Modify Survey"/>
2243	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-CTFB	<input type="button" value="Add Contracting Entity"/>
2245	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-FB RGV	<input type="button" value="Remove Contracting Entity"/>
2246	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-HOUSTON FB	<input type="button" value="Add Commodity"/>
2247	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-SAFB	<input type="button" value="Remove Commodity"/>
2248	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-TEJAS	<input type="button" value="Disable Commodities"/>
2249	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-US FOODS	<input type="button" value=""/>
2244	Annual Survey	Beef-Pork=Poultry-Fish-Eggs-DEES	<input type="button" value=""/>
2250	Annual Survey	Dairy Items-CBBC-DALLAS	<input type="button" value=""/>
2252	Annual Survey	Dairy Items-DEES	<input type="button" value=""/>

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**.

Modify Survey

Survey Information

Survey Status:


Program Year: 2017 - 2018


Program: NSLP

Survey Type: Annual Survey

Survey Name:

Ship Type:

Survey Date: 

Close Date: 

Processing Co-op: N/A

Allocation Groups: San Antonio Food Bank

Pre-allocate Commodities?: No

Special Instructions:

Welcome to SY 17-18. Please indicate how many cases you wish to receive. This survey may re-open during the school year as USDA allows additional ordering opportunity. This Survey closes 5pm 03-01-17.

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**.

ADD

Modify Survey - Add Commodities

Survey Information

Program Year: 2017 - 2018
 Program: NSLP
 Survey Type: Annual Survey
 Survey Name: Vegetables-HOUSTON FB
 Pre-allocate Commodities: No
 Processing Co-op: N/A
 Allocation Groups:

The Commodities indicated in red cannot be added to this survey because they have been included in another Annual Survey distributed to one or more Contracting Entities included in this survey.

Commodity Selection

Select	Item Number	Description	Commodity Type	Pack Size
<input type="checkbox"/>	000488	RstWrks W Baby Baker	Entitlement ▾	80/3.0
<input type="checkbox"/>	004172	JR Buffalo Sticks	Entitlement ▾	144/3.00
<input type="checkbox"/>	004189	Tater Gems	Entitlement ▾	160/3.00
<input type="checkbox"/>	00801WG	LASAGNA WG Chs Rollu	Entitlement ▾	110/4.30
<input type="checkbox"/>	00804WG	RAVIOLI WG Chs	Entitlement ▾	108/3.78
<input type="checkbox"/>	00822WG	WG 4 Chs Lasagna	Entitlement ▾	64/6.5

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
<input type="checkbox"/>	100420 - FLOUR BAKER HRTH UNB	E	1	1	1
<input type="checkbox"/>	100417 - FLOUR BKR BLCH BULK	E	1	1	1
<input type="checkbox"/>	100418 - FLOUR BKR UNBL BULK	E	1	1	1
<input type="checkbox"/>	100912 - FLOUR BREAD-BULK	E	1	1	1
<input type="checkbox"/>	200409 - Flour Whole Wheat	E	1	1	1
<input type="checkbox"/>	100443 - OIL VEGETABLE BULK	E	1	1	1
<input type="checkbox"/>	100397 - Peanut Butter Drum	E	1	1	1
<input type="checkbox"/>	110700 - Peanuts Raw Shelled	E	1	1	1
<input type="checkbox"/>	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**.

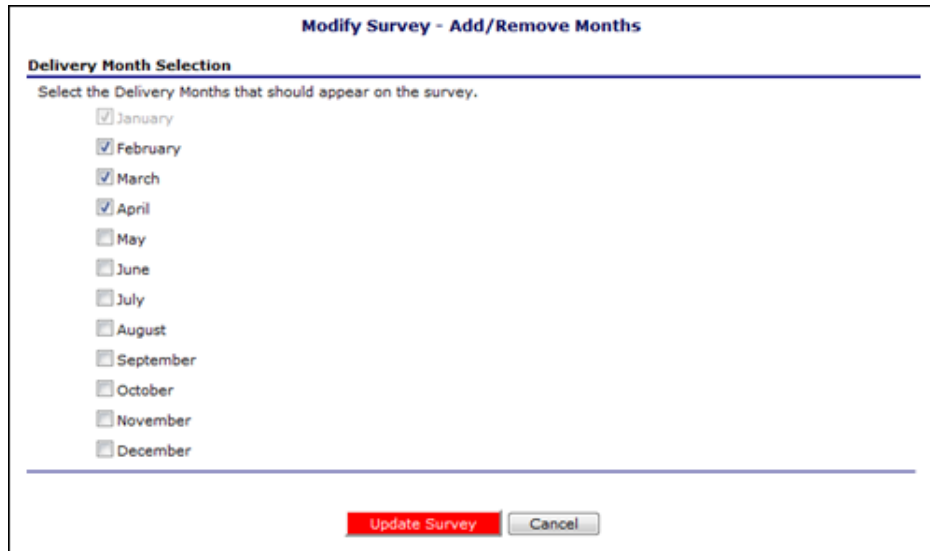
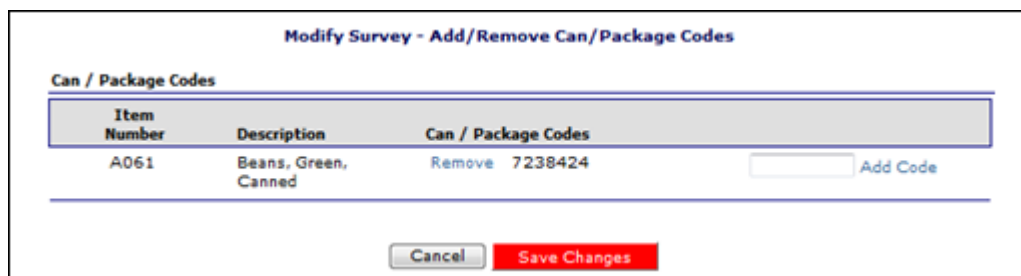


Figure 97: Modify Survey – Add/Remove Months Screen

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**.

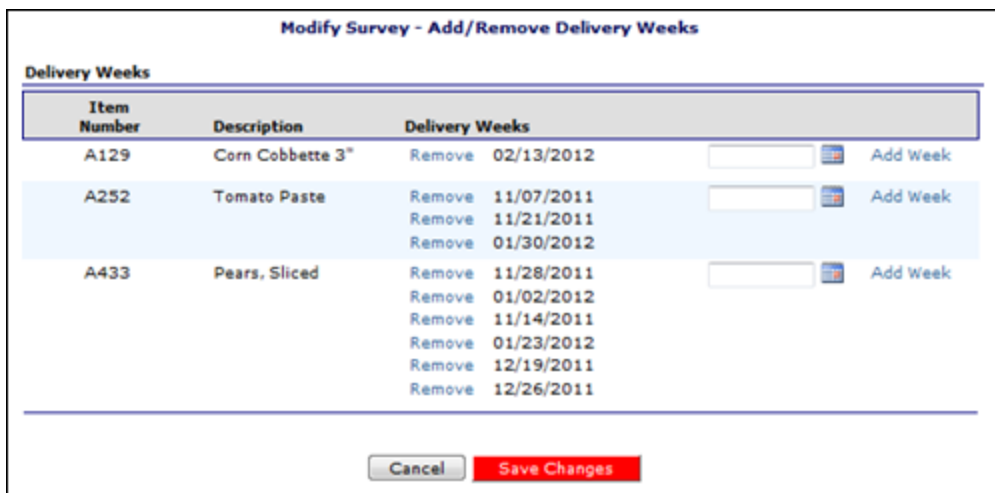


Item Number	Description	Can / Package Codes
A061	Beans, Green, Canned	Remove 7238424

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**.



Item Number	Description	Delivery Weeks		
A129	Corn Cobbette 3"	Remove 02/13/2012	<input type="text"/>	Add Week
A252	Tomato Paste	Remove 11/07/2011 Remove 11/21/2011 Remove 01/30/2012	<input type="text"/>	Add Week
A433	Pears, Sliced	Remove 11/28/2011 Remove 01/02/2012 Remove 11/14/2011 Remove 01/23/2012 Remove 12/19/2011 Remove 12/26/2011	<input type="text"/>	Add Week

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 WBSM 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**.

Item Number	Description	Type	Trucks Requested	Unfilled Requests	Remaining Trucks To Order	Next Due Date
100002	CHEESE CHED SHREDDED WHITE 6/5 LB	E	0.34	0.34	0	Not Available
100003	CHEESE CHED YEL SHRED BAG-6/5 LB	E	3.64	3.64	0	Not Available
100011	CHEESE CHED RDU FAT WHT SHRD-6/5 LB	E	0.6	0.6	0	Not Available
100012	CHEESE CHED RDU FAT YEL SHRD-6/5 LB	E	6.14	6.14	0	Not Available
100017	CHEESE AMERICAN LVS-6/5 LB	E	3.91	3.91	0	Not Available

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**.

Create Annual Survey Orders - Scheduled Shipments

Program Year:	2017 - 2018	Units Requested:	431	Trucks Requested:	0.34
Program:	NSLP	Units Scheduled:	0	Trucks Scheduled:	0.00
Commodity:	100002 - CHEESE CHED SHREDDED WHITE 6/5 LB	Units Ordered:	0	Trucks Ordered:	0.00
Commodity Type:	Entitlement			Truck Load:	1,280
Pack Type:	Cases				

Select All

Select	Warehouse Name	Req Units	Req Trucks	Trucks Ordered	Rem Trucks	Available Unallocated Units	Available Surplus Units	15-Jul-05-Apr
<input type="checkbox"/>	CBBC DALLAS	200	0.16	0.00	0.16	0	0	0.
<input type="checkbox"/>	CENTRAL TEXAS FOOD BANK	70	0.05	0.00	0.05	0	0	0.
<input type="checkbox"/>	DEES FOOD SERVICE	37	0.03	0.00	0.03	0	0	0.
<input type="checkbox"/>	FOOD BANK OF THE RIO GRANDE VALLEY	6	0.00	0.00	0.00	0	0	0.
<input type="checkbox"/>	HOUSTON FOOD BANK	83	0.06	0.00	0.06	0	0	0.
<input type="checkbox"/>	SAN ANTONIO FOOD BANK	7	0.01	0.00	0.01	0	0	0.
<input type="checkbox"/>	US FOODS INC	28	0.02	0.00	0.02	0	0	0.
Trucks Scheduled								0.

Figure 102: Create Annual Survey Orders – Scheduled Shipments Screen

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

SAVE Confirmation

0.00 Trucks have been successfully scheduled.

Total Estimated Value: \$0.00

Figure 103: Create Annual Survey Orders – Save Confirmation

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

Create Annual Survey Orders - Create Orders VIEW

Requested Ship Date:

Order Type: Full Trucks Split Shipments

Display Existing Orders:

Figure 104: Create Annual Survey Orders – Create Orders

- Select all **Warehouses**.
- Select **Create Orders**.

Create New Orders - Full Trucks

Program Year: 2011-2012	Remaining Units To Order: 840
Program: Food Distribution Program	Remaining Trucks To Order: 1.00
Commodity: 100022 - Mozzarella Cheese	Full Truck Load: 840
Commodity Type: Entitlement	1/4 Truck Load: 210

Remaining Orders

Check/Uncheck All

Select Warehouse	Order Quantity	Requested Ship Date
<input checked="" type="checkbox"/> ABC Distribution Center	840	07/31/2011

Comments:

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**.

Create Annual Survey Orders - Clear Remaining Units

Program Year: 2011 - 2012
Program: NSLP
Warehouse: ABC Distribution Center

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**.

Create Annual Survey Orders - Clear Remaining Units

Program Year: 2011 - 2012
Program: NSLP
Warehouse: ABC Distribution Center

Check / Uncheck all

Select	Item Number	Description	Type	Warehouse	Units Requested	Units Remaining
<input checked="" type="checkbox"/>	100022	Mozzarella Cheese	E	ABC Distribution Center	5,000	5,000

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**.

Process Hold/Recall Survey

Program Year:

Program:

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.

Process Hold/Recall Survey

Surveys Results

Program Year: 2014 - 2015	Survey Number: 2081
Program: NSLP	Survey Name: Dees - CFR Frozen Foods Recall - Corn
Processed Date:	Survey Status: Open
Processed By:	Recall Commodities: 100348 - CORN FRZ 30 LB

DEES FOOD SERVICE

CE ID	Contracting Entity	Survey Status	Recall Cans/Units On Hand	Recall Cases On Hand	Recall Pounds On Hand	Reported Illnesses	Recall Units Destroyed?	Destroyed Value
00125	ALPINE ISD	Open	0	0.00	0.0	0	No	\$0.00
00241	CULBERSON COUNTY-ALLAMORE ISD	Open	0	0.00	0.0	0	No	\$0.00
00343	HARMONY PUBLIC SCHOOLS	Open	0	0.00	0.0	0	No	\$0.00
00345	CLINT ISD	Open	0	0.00	0.0	0	No	\$0.00
01006	SONORA ISD	Open	0	0.00	0.0	0	No	\$0.00
01210	CHILD CRISIS CENTER OF EL PASO	Open	0	0.00	0.0	0	No	\$0.00
DEES FOOD SERVICE Totals			0	0.00	0.0	0		\$0.00

State Totals

Recall Cans/Units On Hand	Recall Cases On Hand	Recall Pounds On Hand	Reported Illnesses	Destroyed Value	Entitlement Restored
0	0.00	0.0	0	\$0.00	\$0.00

Restore Entitlement: Yes No

Comments:

Note: Entitlement will only be restored to Contracting Entities that have destroyed their on hand recalled commodities.

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**.

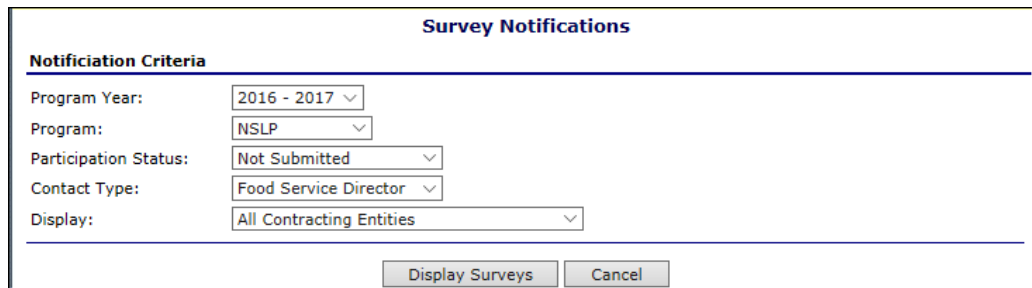
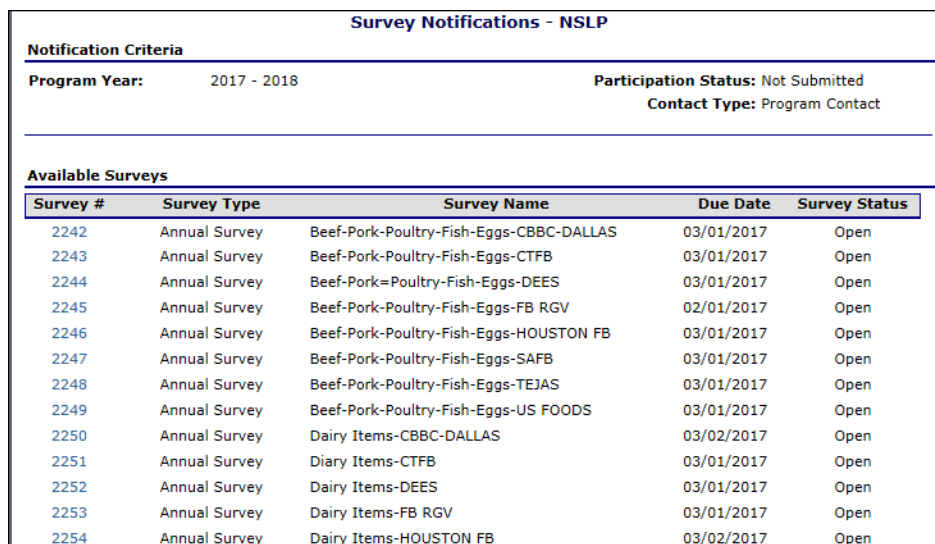


Figure 110: Survey Notifications – Notification Criteria Screen

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



Survey #	Survey Type	Survey Name	Due Date	Survey Status
2242	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-CBBC-DALLAS	03/01/2017	Open
2243	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-CTFB	03/01/2017	Open
2244	Annual Survey	Beef-Pork=Poultry-Fish-Eggs-DEES	03/01/2017	Open
2245	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-FB RGV	02/01/2017	Open
2246	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-HOUSTON FB	03/01/2017	Open
2247	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-SAFB	03/01/2017	Open
2248	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-TEJAS	03/01/2017	Open
2249	Annual Survey	Beef-Pork-Poultry-Fish-Eggs-US FOODS	03/01/2017	Open
2250	Annual Survey	Dairy Items-CBBC-DALLAS	03/02/2017	Open
2251	Annual Survey	Diary Items-CTFB	03/01/2017	Open
2252	Annual Survey	Dairy Items-DEES	03/01/2017	Open
2253	Annual Survey	Dairy Items-FB RGV	03/01/2017	Open
2254	Annual Survey	Dairy Items-HOUSTON FB	03/02/2017	Open

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**.

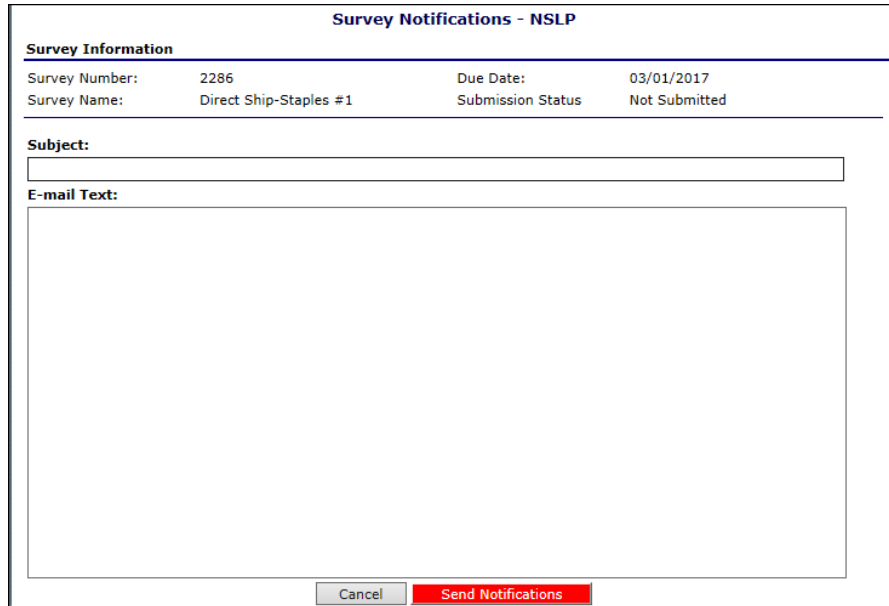


Figure 112: Survey Notifications – NSLP Screen

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**.

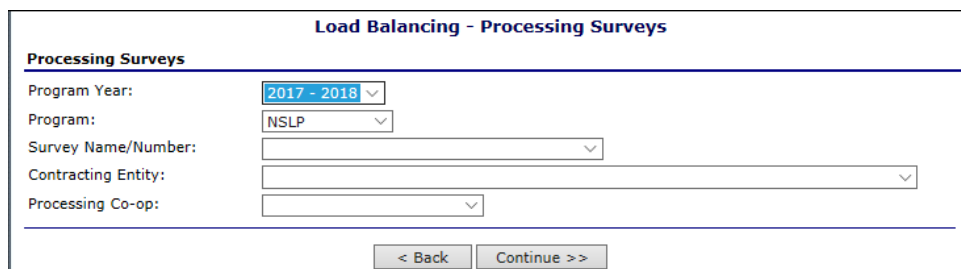


Figure 113: Load Balancing – Processing Surveys Screen

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.

Survey Form - NSLP				
Contracting Entity: HONEY GROVE ISD CE ID: 00369				
Survey Information				
Survey Number:	2345	Survey Type:	Processing Survey	
Due Date:	03/01/2017	Survey Name:	M Reg-Chs & Mozz #1	
		Processing Co-op:	Multiregional	
Special Instructions				
Survey Form				
<input type="checkbox"/> Check here to indicate you will not participate in this survey.				
Commodity	Unit Type	Units Diverted	Units to Process	Processor
200036 - Cheese Amer Lvs PROC	Pounds	0	<input type="text" value="25"/>	Schwans (Main Contractor) ▾
Entitlement		0	<input type="text"/>	▾
Pack Size: Bulk		0	<input type="text"/>	▾
Est. USDA Value: \$1.65		0	<input type="text"/>	▾
Min. Units: 1		0	<input type="text"/>	▾
Min. Units to Multiple Processors: 1		0	<input type="text"/>	▾
		0	<input type="text"/>	▾
		0	<input type="text"/>	▾
		0	<input type="text"/>	▾
		0	<input type="text"/>	▾
		0	<input type="text"/>	▾
		0	<input type="text"/>	▾
		0	<input type="text"/>	▾
		0	<input type="text"/>	▾
		0	<input type="text"/>	▾
		0	<input type="text"/>	▾
		0	<input type="text"/>	▾
110253 - Cheese Ched Wht Bkck	Pounds	0	<input type="text"/>	▾
Entitlement		0	<input type="text"/>	▾
Pack Size: 940/42.5 Lb Bkck		0	<input type="text"/>	▾
Est. USDA Value: \$2.06		0	<input type="text"/>	▾
Min. Units: 1		0	<input type="text"/>	▾
Min. Units to Multiple Processors: 1		0	<input type="text"/>	▾

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**.

Load Balancing - NSLP						
Surveys and Direct Ship Orders						
Program Year: 2017 - 2018						
Item Number	Description	Type	Total Units to Order	Truck Load	Total Trucks	
100017	CHEESE AMERICAN LVS-6/5 LB	Entitlement	1,320	1,320	1.00	
100018	CHEESE AMERICAN YEL SLC LVS-6/5 LB	Entitlement	1,320	1,320	1.00	
100036	CHEESE BLND AMER SKM YEL SLC-6/5 LB	Entitlement	5,280	1,320	4.00	
100046	EGGS WHOLE FRZ CTN-6/5 LB	Entitlement	2,668	1,334	2.00	
100117	CHICKEN FAJITA STRIPS CTN-30 LB	Entitlement	9,100	1,300	7.00	

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**.

Load Balancing Worksheet - NSLP						
Surveys and Direct Ship Orders						
Commodity:	110861 - SQUASH BUTTERNUT DICED IQF CTN 6/5	Order Shipment Month:	<input type="text"/>			
Commodity Type:	Entitlement	Survey Delivery Month:	<input type="text" value="All"/>			
Truck Load:	1,320					
<input type="button" value=" < Back"/>		<input type="button" value=" Display Orders/Surveys"/>				
Direct Ship Orders						
Select an Order # to modify the order.						
Ship Date	Destination	Contracting Entity	Order #	Units Ordered	Total Trucks	+/-
No data to display.						
Periodic Surveys						
Select a Warehouse to adjust the Contracting Entity surveys.						
Delivery Month	Warehouse	Units Requested	Total Trucks	+/-		
July, 2017	HOUSTON ISD WHSE	1,320	1.00	+	330	0
July, 2017	AUSTIN ISD	0	0.00	+	330	0
<input type="button" value=" < Back"/>						

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

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

Load Balancing Worksheet - NSLP

Periodic Surveys

Commodity:	110861 - SQUASH BUTTERNUT DICED IQF CTN 6/5	Warehouse:	AUSTIN ISD
Commodity Type:	Entitlement	Delivery Month:	July, 2017

Select a contracting entity to adjust the contracting entities survey.

Survey #	Survey Name	CE ID	Contracting Entity	Units Requested
2282	DIRECT SHIP REGULAR REQ SY2018	01068	AUSTIN ISD	0
Total Units Requested:				0

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**.

Process Survey

Survey Search

Program Year:	2017 - 2018 <input type="button" value="v"/>
Program:	NSLP <input type="button" value="v"/>
Warehouse:	WAWONA FOODS-5002744 <input type="button" value="v"/>

Figure 120: Process Survey – Survey Search Screen

3. Select a **Program Year**.
4. Select a **Program**.
5. Select a **Warehouse**.
6. Click **Display Surveys**.

Process Survey - SNP				
Available Surveys				
Survey #	Survey Name	Survey Type	Due Date	Survey Status
1590	20985 Test CS	Periodic Survey	07/30/2014	Re-opened
1591	19758 test 1	Periodic Survey	06/06/2015	Open
1621	PeriodicTestMS	Periodic Survey	09/30/2014	Open

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Figure 121: Process Survey – Available Surveys Screen

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

Process Survey - SNP				
Survey Information				
Survey Number:	1590	Warehouse:	CBBC McALLEN	
Survey Name:	20985 Test CS	Survey Type:	Periodic Survey	
Item Number	Description	Type	Units Remaining	Available Inventory
020554	Oven Roasted 1/2" Crinkle Cut	Entitlement	11	0
Criteria				
Process to Run:	<input checked="" type="radio"/> Allocate Commodities <input type="radio"/> Clear Remaining Units			
Month to Process:	<input type="text" value="January, 2015"/>			
< Back		Continue >>		

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 >>**.

Process Survey - Allocate Commodities - SNP

Survey Information

Survey Number: 1590 Warehouse: CBBC McALLEN
 Survey Name: 20985 Test CS Delivery Month: January, 2015
 Survey Type: Periodic Survey

Allocation Information

Allocation Name:
 Allocation Date: 02/18/2015
 Close Date: 02/18/2015

Commodity Allocations

Item Number	Description	Type	Requested Remaining	Unallocated Inventory		Surplus Inventory	
				Available	Allocate	Available	Allocate
020554	Oven Roasted 1/2" Crinkle Cut	E	11	0	<input type="text"/>	0	<input type="text"/>
Totals:			11	0	0	0	0

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**.

Process Survey - Allocate Commodities - NSLP

Survey Information

Survey Number: 1193 Warehouse: Northwest Distribution
 Survey Name: AllocSurvey1 Delivery Month: January, 2011

Allocation Information

Allocation Name: Alloc05
 Allocation Date: 05/20/2011
 Close Date: 05/31/2011

Commodity Allocations

Item Number	Description	Type	Requested Remaining	Allocated
100352	Carrots Frozen Sliced	E	15	1

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**.

Process Survey - NSLP

Available Surveys

Survey #	Survey Name	Survey Type	Due Date	Survey Status
2282	DIRECT SHIP REGULAR REQ SY2018	Periodic Survey	03/01/2017	Open

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 >>**.

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

Check/Uncheck All

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

Comments:

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:			
<input type="button" value="Clear Allocations"/> <input type="button" value=" < Back"/> <input type="button" value="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
<input type="button" value="Continue >>"/> <input type="button" value="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.

Process Diversions - Manage Diversions - NSLP								
Commodities to Divert								
Item Number	Description	Type	Units Requested	Diverted		Remaining		
				Units	Trucks	Units	Trucks	
100047	EGGS WHOLE LIQ Bulk-Tank	E	1,299,611	811,345	16.90	488,266	10.17	
100100	CHICKEN SMALL CHILLED BULK	E	719,447	520,841	14.47	198,606	5.52	
100103	CHICKEN LARGE CHILLED BULK	E	24,209,320	16,277,655	452.16	7,931,665	220.32	
100113	CHICKEN LEGS CHILLED BULK	E	2,661,843	1,681,780	46.72	980,063	27.22	
100124	TURKEY CHILLED BULK	E	4,651,459	3,350,157	93.06	1,301,302	36.15	
100154	BEEF COARSE GRND FRZ Ctn-60 Lb	E	12,289,030	7,331,721	174.56	4,957,309	118.03	

Figure 129: Process Diversions – Divert Commodities Screen

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

Process Diversions - Manage Diversions - NSLP			
Commodity to Divert			
Commodity:	100418 - FLOUR BKR UNBL BULK	Truck Load:	45,000
Commodity Type:	Entitlement	Trucks Remaining:	1.00
Select a Processor to divert commodities.			
Processor		Units	
Schwans (Main Contractor)		Requested:	449,398
		Diverted:	404,398
		Remaining:	45,000
<input style="border: none; background-color: #cccccc;" type="button" value=" < Return to Commodity List "/>		<input style="border: none; background-color: #cccccc;" type="button" value=" Cancel "/>	

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.

Process Diversions - Manage Diversions - NSLP					
Commodity to Divert					
Commodity:	100418 - FLOUR BAKER HARD WHT UNBLEACH-BULK	Processor:	Schwans (Main Contractor)		
Type:	Entitlement	Units Remaining:	45,000		
Truck Load:	45,000	Trucks Remaining:	1.00		
Survey Name:	All Surveys		Processing Co-op:	All Processing Co-ops	
Diversions					
Diversion #	Delivery Date	Units Diverted	Trucks	Split?	Action
Tejas-17-0055	07/01/2016 - 06/30/2017	44,398	0.99	Yes	View Post Allocations
Tejas-17-0053	07/01/2016 - 06/30/2017	45,000	1.00	No	Modify Process Orders
Tejas-17-0054	07/01/2016 - 06/30/2017	45,000	1.00	No	Delete Process Orders
TPC-17-0008	07/01/2016 - 12/31/2016	270,000	6.00	No	Delete Process Orders
<input type="button" value=" < Return to Processor List"/> <input type="button" value=" Cancel"/>					

Figure 131: Process Diversions – Divert Commodities Screen

10. Select **New Diversion**.

Process Diversions - Divert Commodities - NSLP					
Diversion #Tejas-17-0055					
Modify Diversion					
Commodity to Divert					
Commodity:	100418 - FLOUR BKR UNBL BULK		Processor:	Schwans (Main Contractor)	
Type:	Entitlement		Units Remaining:	44,398	
Truck Load:	45,000		Trucks Remaining:	0.99	
Survey Name:	All Surveys		Processing Co-op:	Tejas	
Delivery Information					
Delivery Period:	07/01/2016	To	06/30/2017		
Comments:	Partial Lbs., combine with state trucks				
Split Shipment:	<input checked="" type="checkbox"/>				
USDA Order Numbers:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value=" Add Row"/>					
Quantities to Divert					
To calculate the quantities to divert, enter the "Units to Divert" then click on the "Calculate" button.					
Units to Divert:		<input type="text"/>	<input type="button" value=" Calculate"/>		
Survey	Contracting Entity	Requested	Remaining	%	Divert Qty
2044	00231 - GATESVILLE ISD	9,523	3,146	0.0	<input type="text" value="3146"/>
2044	00332 - ENNIS ISD	9,644	3,186	0.0	<input type="text" value="3186"/>
2044	00459 - HAMILTON ISD	1,500	496	0.0	<input type="text" value="496"/>

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: <input style="width: 90%;" type="text"/>	Allocation Date: <input style="width: 80%;" type="text" value="12/05/2017"/>
--	---

Unallocated Inventory		Surplus Inventory	
Diverted	Available	Allocate	Allocate
36,252	0	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>

Allocation Detail

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

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

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:

Commodity:

Warehouse:

Program Year:

Program:

Sort By: Item Number Commodity Description

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.

Inventory Inquiry - Allocation Inventory									
Commodity:		All Commodities			Warehouse:		CENTRAL TEXAS FOOD BANK		
Program:		All Programs			Program Year:		2015 - 2016		
Inventory Information									
Item Number	Description	Year	Program	Type	Unallocated	Surplus	Held	Total	
100050	MILK 1% MLKFAT UHT 1500-12/32 FL OZ	2016	TEFAP	E	1,500	0	0	1,500	
<input style="border: none; background-color: #cccccc; padding: 2px 10px;" type="button" value=" < Back "/>									

Figure 136: Inventory Inquiry – Allocation Inventory Screen

3.36.2 Viewing On Hand Inventory

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

Inventory Inquiry	
Inventory Inquiry Criteria	
Inventory Type:	<input type="text" value="On Hand Inventory"/>
Commodity:	<input type="text" value="All Commodities"/>
Warehouse:	<input type="text" value="State Distribution Center"/>
Sort By:	<input checked="" type="radio"/> Item Number <input type="radio"/> Commodity Description
<input style="border: none; background-color: #cccccc; padding: 2px 10px;" type="button" value=" < Back "/> <input style="border: none; background-color: #cccccc; padding: 2px 10px;" type="button" value=" Show Inventory "/>	

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.

Inventory Inquiry - On Hand Inventory						
Commodity:		All Commodities		Warehouse:		CBBC DALLAS
Inventory Information						
Item Number	Description	Physical	USDA Damaged	Contracting Entity Damaged	Inbound	
100003	CHEESE CHD YEL SHRD	60	0	0	0	0
100012	CHEES CHD RF YEL SHD	635	1	0	0	0
100017	CHEESE AMER LVS-6/5	1	0	0	0	0
100018	CHEESE AMER YEL SLC	254	0	0	0	0

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**.

Item Number	Description	Program	Type	Unallocated	Surplus	USDA Damaged	Contracting Entity Damaged
5722	Alfredo Sauce	SNP	E	50	240	0	0
5722	Alfredo Sauce	SFSP	E	1500	0	0	0

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**.

Inventory Adjustment - Allocation Inventory

Commodity: 100258 - Apple Sliced Frz **Warehouse:** State Distribution Center

Program: SFSP
Program Year: 2011 - 2012
Commodity Type: Bonus
Adjustment Type: Inventory Increase ▾
Available: 5000
Adjustment Amount:
Lot Number:
Comments:

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**.

Inventory Adjustment - Add New Inventory

Commodity: 5722 - Alfredo Sauce **Warehouse:** State Distribution Center

Program:

Program Year:


Commodity Type:


Inventory Level:

Amount:

Lot Number:

Order Number:

Received Date: 

Pack Date: 

Comments:

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**.

Inventory Transfer

Inventory Information

Commodity:

Warehouse:

Program Year:

Program:

Inventory Level:

Commodity Group:

Figure 143: Inventory Transfer Screen

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

Inventory Transfer - Allocation Inventory							
Commodity:	All Commodities			Warehouse:	CENTRAL TEXAS FOOD BANK		
Program:	All Programs			Inventory Level:	All Inventory		
Commodity Group:	All Groups						
Inventory Information							
Item Number	Description	Program	Type	Unallocated	Surplus	Held	
100017	CHEESE AMERICAN LVS-6/5 LB	NSLP	E	0	437	0	
100034	CHEESE MOZ LITE SHRED FRZ BOX-30 LB	NSLP	E	0	200	0	
100037	CHEESE BLEND AM/SK RED FAT WHITE SL	NSLP	E	0	104	0	
100046	EGGS WHOLE FRZ CTN-6/5 LB	NSLP	E	0	401	0	
100098	CHICKEN CUT-UP FRZ CTN-40 LB	NSLP	E	0	0	272	
100121	TURKEY BREAST DELI FRZ CTN-40 LB	NSLP	E	0	940	0	

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**.

Inventory Transfer	
Inventory Information	
Commodity:	All Commodities
Warehouse:	State Distribution Center
Program Year:	2016 - 2017
Program:	All Programs
Inventory Level:	All Inventory
Commodity Group:	All Groups
<input type="button" value=" < Back"/> <input type="button" value=" Show Inventory"/> <input type="button" value=" Rollover Inventory"/>	

Figure 145: Inventory Transfer Screen

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

Inventory Transfer - Allocation Inventory

Rollover Information

Warehouse:	CENTRAL TEXAS FOOD BANK	CENTRAL TEXAS FOOD BANK
Year:	2017	2016 - 2017
Program:	NSLP	NSLP
Inventory Level:	All Inventory	Unallocated

Comments:

Check/Uncheck All

Inventory Information - All Groups

Select	Item Number	Description	Program	Type	Unallocated	Surplus	Held
<input type="checkbox"/>	100017	CHEESE AMERICAN LVS-6/5 LB	NSLP	E	0	437	0
<input type="checkbox"/>	100034	CHEESE MOZ LITE SHRED FRZ BOX-30 LB	NSLP	E	0	200	0
<input type="checkbox"/>	100037	CHEESE BLEND AM/SK RED FAT WHITE SL	NSLP	E	0	104	0

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	<ul style="list-style-type: none"> Enables the user to create and track Inbound Shipments
Receive Orders	<ul style="list-style-type: none"> Enables the user to receive Inbound Shipments
WBSCM Import/Export	<ul style="list-style-type: none"> Enables the user to import/export orders and updates to/from WBSCM

Item	Description
Order Food	Create and Track Inbound Shipments
Receive Orders	Receive Inbound Inbound Shipments
WBSCM Import/Export	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**.

New Inbound Shipment

Order Information

Program Year:

Program:

Order Type:

Order Sub-Type:

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**.

New Inbound Shipment - NSLP

USDA Catalog - Order Selection

Group/Item Description	Commodity Type	Requested Ship Date	Order No Later Than
<input type="checkbox"/> Beans (Canned and Dry)			
<input type="checkbox"/> Dairy			
<input type="checkbox"/> Fish			
<input type="checkbox"/> Flour			
<input type="checkbox"/> Fruits (Canned, Dried, Fresh, Frozen)			
<input type="checkbox"/> Grains			
<input type="checkbox"/> Juice			
<input type="checkbox"/> Meat			
<input type="checkbox"/> Oils			
<input type="checkbox"/> Pasta/Rice			
<input type="checkbox"/> Peanut/Sunflower			
<input type="checkbox"/> Poultry			
<input type="checkbox"/> Vegetables			

Commodities marked with a red * might not exist or are inactive.

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**.

New Food Order

Order Information

Order Type: Standard USDA Order - WSCM Order Number: -

Program Year: 2012 PO Number:

Program: NSLP

Contracting Entity: Order Status: New

Commodity Information

Commodity: Cheese Am Blind Sliced White - 100037

Pack Type: Cases

Commodity Type: Entitlement

Truck Load: 1320

Order Qty:

Estimated Cost Per Pound:

Buy Cost Per Pound:

Delivery Information

Ship To Warehouse: ABC Direct Ship

Split Shipment ID:

Requested Ship Date:

Ship Not Earlier Than Date:

Miscellaneous Information

Forwarding Notice PO#:

Contract Number:

Comments:

Created By: On: Modified By: On:

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**.

Inbound Shipments

Search for Inbound Shipments

Program Year: 2016 - 2017 Program: All Programs Warehouse: All Warehouses Contracting Entity: Commodity: All Commodities Display By: <input type="radio"/> PO Number <input checked="" type="radio"/> Order Number	Warehouse Type: All Types Order Type: Standard USDA Order - WBSCM Order Status: All SDA PO #: Order #: Ship Month (MM/YYYY): / /
---	---

Orders Found: 6,990

Order #	Warehouse	Item #	Commodity	Est. Ship Quantity	Split Shipment Split ID	Ship Date	Order Status
5000276658-000100	HOUSTON FOOD BANK	100158	BEEF FINE GRND FRZ-LFT FREE-40 LB	532	Yes 0867974890	07/31/2016	Order Received
5000276658-000300	CBBC DALLAS	100158	BEEF FINE GRND FRZ-LFT FREE-40 LB	318	Yes 0867974890	07/31/2016	Order Received
5000294851-000100	CENTRAL TEXAS FOOD BANK	100158	BEEF FINE GRND FRZ-LFT FREE-40 LB	334	Yes 0152841190	07/31/2016	Order Received
5000294851-000200	SAN ANTONIO FOOD BANK	100158	BEEF FINE GRND FRZ-LFT FREE-40 LB	333	Yes 0152841190	07/31/2016	Order Received

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**.

Food Order # 5000276658-000100

Order Information

Order Type: Standard USDA Order - WBSCM	Order Number: 5000276658 - 000100
Program Year: 2016 - 2017	PO Number: 1700004925
Program: NSLP	Order Status: Order Received

Commodity Information

Commodity: BEEF FINE GRND FRZ-LFT FREE-40 LB - 100158
Pack Type: Cases
Commodity Type: Entitlement
Truck Load: 1000
Order Qty - Trucks: 0.53
Order Qty: 532
Estimated Cost Per Pound: 2.34000
Buy Cost Per Pound: 2.34000

Delivery Information

Ship To Warehouse: HOUSTON FOOD BANK
Split Shipment ID: 0867974890
Requested Ship Date: 07/31/2016
Ship Not Earlier Than Date: 07/31/2016

Miscellaneous Information

Forwarding Notice PO#:
Forwarding Notice PO Line#: 00000
Contract Number:
Comments:

Created By: AHODAPP On: 07/26/2016 7:19:30 AM Modified By: AHODAPP On: 03/17/2017 5:39:51 PM

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.

Receiving

Search for Food Orders

Program Year: <input type="text" value="2016 - 2017"/>	Warehouse Type: <input type="text" value="All Types"/>
Program: <input type="text" value="All Programs"/>	Order Type: <input type="text"/>
Warehouse: <input type="text" value="All Warehouses"/>	Order Status: <input type="text" value="All"/>
Contracting Entity: <input type="text"/>	Order Number: <input type="text"/>
Commodity: <input type="text" value="All Commodities"/>	Display Exceptions Only: <input type="checkbox"/>

Order #	Warehouse	Commodity	Units Ordered	Units Received	Ship Date	Order Status
5000307452-000100	ALDINE ISD - LABATT WHSE	BEANS GREEN CAN-6/10 - 100307	912	0	01/31/2017	Order Received
5000309046-000100	GARLAND ISD	BEANS GREEN CAN-6/10 - 100307	912	912	02/15/2017	Order Received
5000309055-000100	GARLAND ISD	BEANS GREEN CAN-6/10 - 100307	912	912	07/31/2016	Order Received
5000319916-000100	TEJAS CO-OP SAN ANTONIO	BEANS GREEN CAN-6/10 - 100307	388	388	10/17/2016	Order Received
5000319916-000200	TEJAS CO-OP DALLAS	BEANS GREEN CAN-6/10 - 100307	524	524	10/17/2016	Order Received

Figure 153: Receiving - Search for Inbound Shipments

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

Receiving						
Order Information						
Commodity:	PEACHES CLING SLICES EX LT CAN-6/10 - 100219			Order Number:	5000316517-000100	
Commodity Type:	Entitlement			Contracting Entity:	Warehouse: NORTHSIDE ISD	
Units Ordered:	912			Program Year:	2016 - 2017	
Units Received:	912			Program:	NSLP	
Receipts						
Status	Appointment Date	Receive Date	Units Inbound	Units Received	Units Damaged	Action
Received		01/09/2017	0	912	0	View
Total			0	912	0	
<input type="button" value=" < Back"/> <input type="button" value=" New Receipt"/>						

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**.

Inventory Receipt						ADD
Order Information						
Commodity:	PEACHES CLING SLICES EX LT CAN-6/10 - 100219			Order Type:	Standard USDA Order - WBSCM	
Commodity Type:	Entitlement			Order Number:	5000316517-000100	
Units Ordered:	912			Contracting Entity:	Warehouse: NORTHSIDE ISD	
Buy Cost:	0.66			Program Year:	2016 - 2017	
				Program:	NSLP	
Receiving Information						
Receiving Status:	<input type="text" value=""/>			Select a Receiving Status to continue...		
Created By:	Developer	On:	12/05/2017	Modified By:		On:
<input type="button" value=" Save"/> <input type="button" value=" Cancel"/>						

Figure 155: Inventory Receipt (Inbound) Screen

ADD

Inventory Receipt

Order Information

Commodity:	PEACHES CLING SLICES EX LT CAN-6/10 - 100219	Order Type: Standard USDA Order - WBSCM
Commodity Type:	Entitlement	Order Number: 5000316517-000100
Units Ordered:	912	Contracting Entity:
Buy Cost:	0.66	Warehouse: NORTHSIDE ISD
		Program Year: 2016 - 2017
		Program: NSLP

Receiving Information

Receiving Status: Received ▾

Date Received:

Vendor Batch Number:

Total Units Received:

Units Damaged:

Seal Number:

Units Received into Inventory:

USDA Value Per Unit:

Comments:

Delivery Information

Was the Carrier Present? Yes No

Name of Carrier Company:

Who Signed Bill of Lading?

Was refrigeration equipment running? Yes No

When did damages, if any, occur? Not Applicable/Other ▾

OS&D Comments:

Created By: Developer On: 12/05/2017 Modified By: On:

Last Export By: On:

Save
Cancel

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**.

Receiving						
Order Information						
Commodity:	BEANS GREEN CAN-6/10 - 100307			Order Number:	5000307452-000100	
Commodity Type:	Entitlement			Contracting Entity:	ALDINE ISD - LABATT WHSE	
Units Ordered:	912			Program Year:	2016 - 2017	
Units Received:	0			Program:	NSLP	
Receipts						
Status	Appointment Date	Receive Date	Units Inbound	Units Received	Units Damaged	Action
No data to display.						
<input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" New Receipt "/>						

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

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**.

Food Order Export					
Export History					
Action	Program Year	Program	Warehouse	Export Date	Exported By
1. View	2012 - 2013	All Programs	ALL	08/07/2012	AHODAPP
2. View	2012 - 2013	All Programs	ALL	08/07/2012	AHODAPP
3. View	2012 - 2013	NSLP	ALL	08/03/2012	MMCELHANEY
4. View	2012 - 2013	NSLP	ALL	06/08/2012	MMCELHANEY
5. View	2012 - 2013	NSLP	ALL	06/01/2012	MMCELHANEY

Search for Food Orders					
Program Year:	<input type="text" value="2016 - 2017"/>	Warehouse Type:	<input type="text" value="All Types"/>		
Program:	<input type="text" value="All Programs"/>	Order Status:	<input type="text" value="All"/>		
Warehouse:	<input type="text" value="All Warehouses"/>	PO Number:	<input type="text"/>		
Commodity:	<input type="text" value="All Commodities"/>				

Figure 159: Inbound Shipment Export Screen

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

Food Order Export					
Search for Food Orders					
Program Year:	<input type="text" value="2010 - 2011"/>	Warehouse Type:	<input type="text" value="All Types"/>		
Program:	<input type="text" value="All Programs"/>	Order Status:	<input type="text" value="All"/>		
Warehouse:	<input type="text" value="All Warehouses"/>	PO Number:	<input type="text" value="All"/>		
Commodity:	<input type="text" value="All Commodities"/>				

Check/Uncheck All

Select	PO#	Warehouse	Commodity	Ship Date	Order Status
<input type="checkbox"/>	1100000010	Northwest Distribution	Applesauce Canned - A350	4/15/2011	New
<input type="checkbox"/>	1100000002	Advance Foods	Green Beans Canned - A061	5/15/2011	New
<input type="checkbox"/>	1100000001	Advance Foods	Green Beans Canned - A061	5/22/2011	Error
<input type="checkbox"/>	1100000009	Northwest Distribution	Turkey Ham - A548	6/15/2011	New

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.

WBSMC Order Import

Action	File Name	New Records	Updated Records	Deleted Records	Error Records	Imported Date Imported By	Import Status
1. View	WBSMC OrderDownload_1.xml	0	0	0	2	Developer	File imported successfully with errors.

To import a file:

1. Click on the "Browse" button to find the .XML file on your computer.
2. Once you locate the file, click the "Open" button.
3. When finished with the above steps, click "Import Food Orders".

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

Figure 162: WBSMC Order Import Screen

WBSMC Catalog Import

Action	File Name	New Records	Updated Records	Deleted Records	Error Records	Imported Date Imported By	Import Status
1. View	Training Product Catalog.xml	294	0	0	0	Developer	File imported successfully.

Type of Import

New Catalog - Replaces the current catalog file with the new catalog file.

Add Dates - Add new available Ship Dates to the existing catalog file.

Update Dates After - Replaces existing Ship Dates with new Ship Dates.

To import a file:

1. Click on the "Browse" button to find the .XML file on your computer.
2. Once you locate the file, click the "Open" button.
3. When finished with the above steps, click "Import Catalog".

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

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.

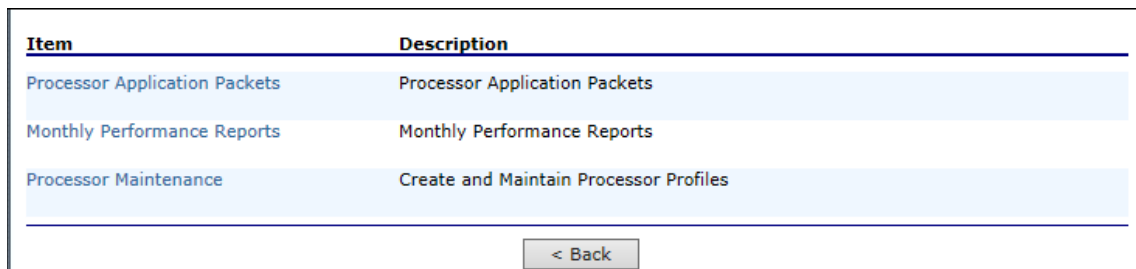
Import/Export History							
Search Criteria							
Log Type: <input type="text" value="Catalog Import"/>		From: <input type="text" value="11/28/15"/>		To: <input type="text" value="12/05/2017"/>			
<input type="button" value=" < Back"/>		<input type="button" value=" Display History"/>					
Action	File 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	<ul style="list-style-type: none"> Enables users to view/modify processor application packets.
Monthly Performance Reports	<ul style="list-style-type: none"> Enables users to view monthly performance. Note: This feature is not currently used in TX-UNPS.
Processor Maintenance	<ul style="list-style-type: none"> 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

< Back

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.



Please Note: If no criteria are entered, the system will search by the system default selection(s) and will display all available processor applications.

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

Processor Application

Program Year:

Processor Name:

Processor Agreement Number:

Processor Consultant:

Processor Applications

Processor Agreement Number	Processor Name	Application Packet Status	Processor Status	Processor Assigned To
TX-001B	AdvancePierre Foods	Not Started	Active	
TX-001C	AdvancePierre Foods	Not Started	Active	
TX-001D	AdvancePierre Foods	Not Started	Active	

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

2016 - 2017 Processor Application Packet

Asian Food Solutions (Main Contractor)
Agreement Number: TX-003A

Action	Form Name	Status
Add	Processor Application	NOTSTARTED

Packet History

Event	Event Date/Time	User
No data to display.		

Figure 167: Processor Application Packet - New Screen

5. Complete the **application**.

ADD

Processor Application

Asian Food Solutions (Main Contractor)
 Agreement Number: TX-003A

Processor Primary Contact

	First Name	Last Name
1. Name:	<input type="text"/>	<input type="text"/>
2. Title:	<input type="text"/>	
3. Phone:	<input type="text"/> - <input type="text"/>	Ext: <input type="text"/>
4. Mobile Phone:	<input type="text"/> - <input type="text"/>	
5. Fax:	<input type="text"/> - <input type="text"/>	
6. Email Address:	<input type="text"/>	

Hold Recall Information

USDA requires that State agencies and processors exchange hold and recall contact information.

Texas Department of Agriculture Information:

Primary Point of Contact	Back-up Point of Contact(if primary unavailable)
--------------------------	--

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.

2015 - 2016 Processor Application Packet

Baily International, Inc. Agreement Number: TX-065 Contact Name: Telephone:	Packet Type: New Packet Approved Date: Packet Status: Not Submitted Processor Status: Active
---	---

Action	Form Name	Status
View Modify Admin	➔ Processor Application	Incomplete
Add Storage Facilities:		
View Modify Admin	➔ Checklist	Items Pending
View Modify	✔ Donated Foods Processed (2)	
View Modify	Notes (0)	

Packet History

Event	Event Date/Time	User
The Application Packet was Created.	10/03/2016 11:10:35 AM	

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**.

ADD

Processor Storage Facility

Baily International, Inc.
Agreement Number: TX-065

Facility Address

1. Address 1:

2. Address 2:

3. City:

4. State: Zip: -

Facility Contact

	First Name	Last Name	
5. Name:	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	
6. Phone:	<input style="width: 50px;" type="text" value="- -"/>	Ext: <input style="width: 50px;" type="text"/>	
7. Mobile Phone:	<input style="width: 50px;" type="text" value="- -"/>		
8. Fax:	<input style="width: 50px;" type="text" value="- -"/>		
9. Email Address:	<input style="width: 100%;" type="text"/>		

Facility Information

10. Describe this storage facility. Include square feet and type (i.e. silo capacity, dry, cold or freezer).

Information Certification

11. I certify the above information is current and correct.

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)	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	10/03/2016	
H2048 Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion - Lower Tier Covered Transactions	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	10/03/2016	
H2049 Certification Regarding Lobbying	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	10/03/2016	
Certification Regarding Drug-Free Workplace (Grants) Alternative 1 - For Grantees Other Than Individuals	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	10/03/2016	
Summary End Product Data Schedule	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	10/03/2016	
Certificate of Authority	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	10/03/2016	
Nondisclosure Statement	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	10/03/2016	
Child Support Certification	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	10/03/2016	
FNS 7 or List of Delivery Destinations	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	10/03/2016	

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.

Donated Foods Processed

Baily International, Inc.
 Agreement Number: TX-065

To add a commodity, search for and select the commodity.

Donated Food(s) to be Processed

Item Number	Commodity	Pack Size	Action
100193	PORK PICNIC BONELESS FRZ 60 Lb	Bulk	Remove
100155	BEEF FRESH BNLS COMBO 20/2000Lb	20/2000 Lb Ctn	Remove

Available Commodities

Commodity:

Item Number	Commodity	Pack Size	Action
200258	Apple Slices Frz Ctn-30 Lb PROC	Bulk	Add
200206	Apple Slices Can-6/10 PROC	Bulk	Add

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

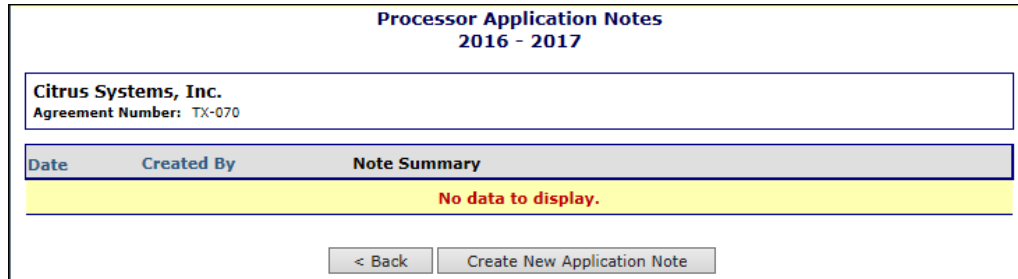


Please Note: Notes are visible only to authorized State users.

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.



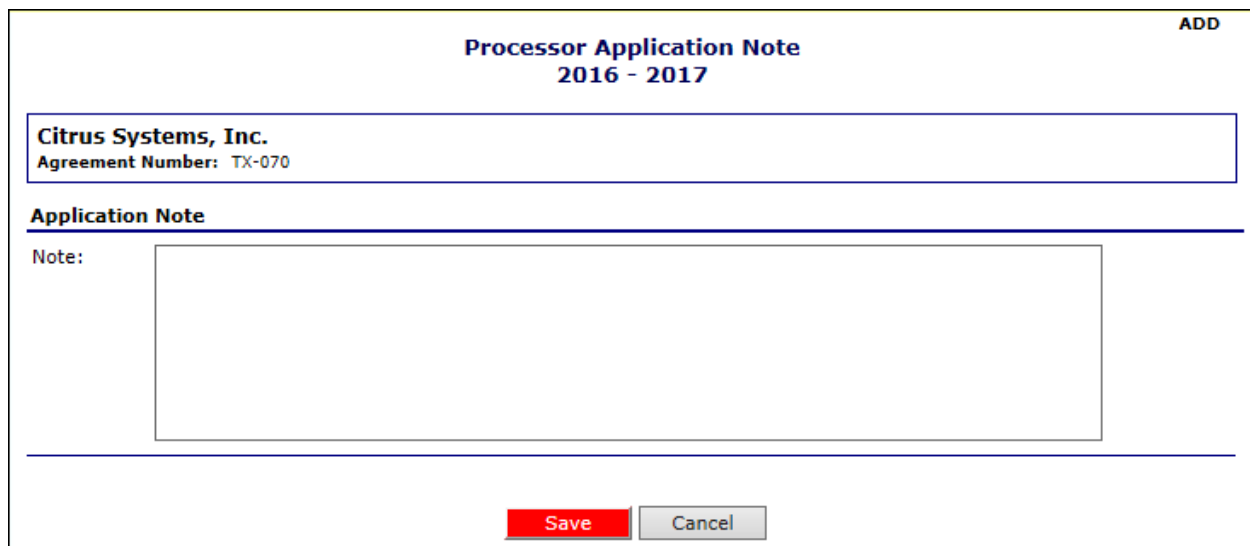
Processor Application Notes
2016 - 2017

Citrus Systems, Inc.
 Agreement Number: TX-070

Date	Created By	Note Summary
No data to display.		

Figure 173: Processor Application Notes Screen

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



Processor Application Note ADD
2016 - 2017

Citrus Systems, Inc.
 Agreement Number: TX-070

Application Note

Note:

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**.

ADD

Processor Information

Processor Information

Processor Name:

Agreement Number:

Federal Identification No. (FEIN):

Processor Status:

Mailing Address


Address 1:

Address 2:

City:

State: Zip: -

Miscellaneous Information

Agreement Approval Date: 

Begin Year:

End Year:

Web Address:

Warehouse:

Processor Consultant:

End Products:

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**.

DELETE

Processor Information

Asian Food Solutions (Main Contractor)
 Agreement Number: TX-003A

Processor Information

Processor Name: Asian Food Solutions (Main Contractor)
 Agreement Number: TX-003A
 Federal Identification No. (FEIN):
 Processor Status: Active

Mailing Address

Address 1: 121 Rant Street
 Address 2:
 City: Morganton
 State: NC Zip: 28655 - 0000

Miscellaneous Information

Agreement Approval Date: 02/28/2012
 Begin Year: 2011 - 2012
 End Year: 2016 - 2017
 Web Address:
 Warehouse: ASIAN FOOD SOLUTIONS-5003111
 Processor Consultant: ▼
 End Products:

Delete Processor
Cancel

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**.

Donated Foods Processed

Cavendish Farms, Inc.
Agreement Number: TX-068

To add a commodity, search for and select the commodity.

Donated Food(s) to be Processed

Item Number	Commodity	Pack Size	Action
100980	SWEET POTATO BULK FRESH PROC	Bulk	Remove
100506	Potato Bulk for Process Frz	Bulk	Remove

Available Commodities

Commodity:

Item Number	Commodity	Pack Size	Action
100260	APRICOT FRZ Ctn-40 Lb	1000 / 40 Lb	Add
100262	CRANBERRY WHOLE FRZ CTN-40 Lb	40 LB CT	Add
100332	TOMATO PASTE FOR BULK PROCESSING	14/2850 Lb Ctn	Add

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	<ul style="list-style-type: none"> Enables users to process invoices for Contracting Entity orders.
Manual Invoice Adjustments	<ul style="list-style-type: none"> Enables users to create manual invoice adjustments.
FDP Invoice Listing	<ul style="list-style-type: none"> 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

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

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:

Program:

Order Type:

Orders Shipped on or Before: 

Requester Information

Requester Name:

Unit Title:

Telephone:

Classification/Title:

Warehouse

Warehouse:

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.

Process Invoices - Orders
Select Orders for Invoice Batch # 6956

Batch Number	FDP Program	Process Date	Orders shipped on or before
6956	NSLP		12/05/2017

Requester Name: Developer B. CCG **Warehouse:** CENTRAL TEXAS FOOD BANK
Unit Title:
Telephone: 6232091700
Classification/Title: Developer

Click here to check - uncheck all

Approve for Batch	CE ID	Contracting Entity Name	Order Number	Shipped Date	Invoice Amount
<input type="checkbox"/>	00688	BOERNE ISD	115321	03/23/2017	\$0.00
<input type="checkbox"/>	00691	CENTER POINT ISD	114759	03/28/2017	\$0.00
<input type="checkbox"/>	00689	COMFORT ISD	114442	03/28/2017	\$0.00
<input type="checkbox"/>	00815	GOLDTHWAITE ISD	115299	03/22/2017	\$0.00

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.

Process Invoices - Orders					
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				
<input style="border: 1px solid gray; padding: 2px 10px;" type="button" value=" < Back "/>				
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.

Manual Invoice Adjustments

Adjustment Criteria

Program Year:

Program:

Contracting Entity:

CE ID:

Date Range: (Optional) From: Through:

Adjustments

CE ID	Contracting Entity Name	Adjustment Date	Created By	Invoice Number	Amount
01178	PLAINS ISD	08/16/2016	swilliams20	17 032179	-11.70
00401	AMBASSADORS PREPARATORY ACADEMY	08/22/2016	AGarcia18	17 031691	-110.88
00400	ODYSSEY 2020 ACADEMY, INC.	08/22/2016	AGarcia18	17 031700	-3.36

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**.

Manual Invoice Adjustment

Manual Adjustment

Program Year: 2016 - 2017

Program: NSLP

Order Number:

Invoice Number:

Adjustment Type:

Adjustment Amount:

Description:

(Maximum length 75 characters)

Adjustment amounts are entered in positive or negative numbers. A positive adjustment will result in an Invoice CHARGE. A negative adjustment will result in an Invoice CREDIT.

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.

**FDP Invoice Listing - NSLP
2017 - 2018**

Show Direct Ship Invoices
 Show Warehouse Invoices
 Show only Invoices with balances Balance > 0 Balance < 0

Batches

Batch	Invoice Type	Invoices	Invoice Date	Invoiced	Balance
6953	Orders - Warehouse	1	07/21/2017	\$1,713.50	\$1,513.50
6952	Orders - Warehouse	1	07/21/2017	(\$200.00)	\$0.00
6951	Orders - Warehouse	1	07/21/2017	\$81.20	\$81.20
6950	Orders - Warehouse	1	07/21/2017	\$930.00	\$930.00
6948	Orders - Direct Ship	1	07/21/2017	\$0.00	\$0.00
				\$2,524.70	\$2,524.70

Figure 187: FDP Invoice Listing – by Program Screen

**FDP Invoice Listing - NSLP
2017 - 2018**

Show Paid Invoices
 Show Cancelled Invoices
 Show Write Offs

Select an Invoice Number to view/print the Invoice. Select a Status to view/update the status of the invoice.

Invoices

Batch	CE ID	Contracting Entity	Invoice Number	Invoice Date	Status	Invoiced	Balance
6953	05423	IDEA Academy Austin - FDP	18 036263	07/21/2017	Invoiced	\$1,713.50	\$1,513.50
Totals:						\$1,713.50	\$1,513.50

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:

Paid Date: 

Comment:

Created By: Developer On: 07/21/2017

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.

Operations > FDP Maintenance >		Program Year: 2020 - 2021
Item	Description	
Contracting Entity Email Notifications	Send email notifications to agency contacts	
Contracting Entity Order Lockout	Lock Contracting Entities out of Allocation and/or Surplus Ordering	
Allocation Groups	Maintain Allocation Groups and Delivery Periods	
Carriers	Create and Maintain Carrier Profiles	
Commodities	Create and Maintain Commodity Profiles	
Data Import/Export	Import Export FDP Data	
Delivery Route Maintenance	Delivery Route Maintenance	
Delivery Stop Maintenance	Delivery Stop Maintenance	
FDP Program Years	Maintain FDP Program Years	
Processing Co-ops	Create and Maintain Processing Co-op profiles	
Table Maintenance	Maintain FDP Support Tables	
USDA Entities	Create and Maintain USDA Entity Information	
Warehouses	Displays a list of Warehouses for maintenance	
CnpTaskTest	Testing utility for the cts task manager	

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 >>**.

Operations > FDP Maintenance > Program Year: 2019 - 2020

Agency Email Notifications

Agency Selection Criteria

Program Year:
Program:
Contact Type: Food Service Director (Primary Contact) Business Manager Secondary Contact
Allocation Group: Check/Un-check All

Tejas Coop-(LABATT) US Food Service
Agreement Status: Approved Inactive On Hold
 Unapproved

Agreement Packet Status: Approved Denied Not Started
 Not Submitted Returned Self Cancelled
 State Cancelled State Terminated Submitted
 Withdrawn

Figure 191: Email Notifications Screen

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

Operations > FDP Maintenance > Program Year: 2019 - 2020

Agency Email Notifications

Notification Criteria

Program Year: 2019 - 2020
Program: NSLP
Contact Type: Food Service Director (Primary Contact), Business Manager
Allocation Groups:
Agreement Status: Approved, On Hold, Unapproved
Agreement Packet Status: Approved, Denied, Not Started, Not Submitted, Returned, Self Cancelled, State Cancelled, Submitted, Withdrawn

Agency Number	Agency	Contact	E-Mail
00522	NYOGS DS Agency 1		
00010	Sample Customer (10)		
01000	Sample Customer (1000)		
01001	Sample Customer (1001)		

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**.

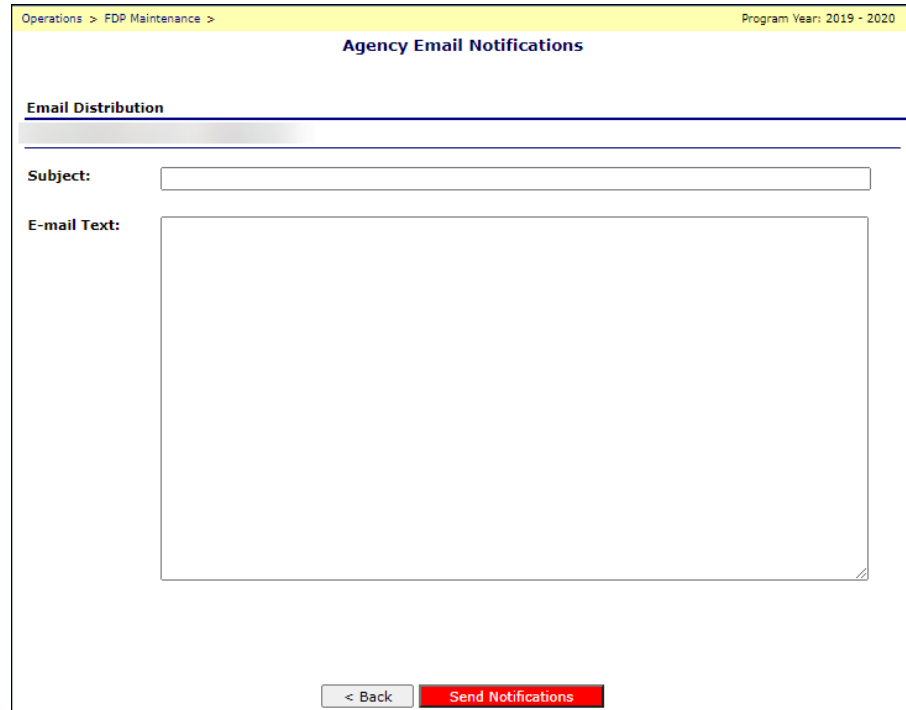


Figure 193: Agency Email Screen

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 <input type="checkbox"/> Check here to Lock/Unlock all	Surplus Orders <input type="checkbox"/> Check here to Lock/Unlock all
CBBC Dallas	<input type="checkbox"/> UNLOCKED	<input type="checkbox"/> UNLOCKED
Central Texas Food Bank	<input type="checkbox"/> UNLOCKED	<input type="checkbox"/> UNLOCKED
Dees Food Service	<input type="checkbox"/> UNLOCKED	<input type="checkbox"/> UNLOCKED
Direct Ship Schools	<input type="checkbox"/> UNLOCKED	<input type="checkbox"/> UNLOCKED
FMNP/SFMNP	<input type="checkbox"/> UNLOCKED	<input type="checkbox"/> UNLOCKED
Food Bank Group	<input type="checkbox"/> UNLOCKED	<input type="checkbox"/> UNLOCKED
Food Bank RGV	<input type="checkbox"/> UNLOCKED	<input type="checkbox"/> UNLOCKED
Houston Food Bank	<input type="checkbox"/> UNLOCKED	<input type="checkbox"/> UNLOCKED
San Antonio Food Bank	<input type="checkbox"/> UNLOCKED	<input type="checkbox"/> UNLOCKED
Tejas Coop-(LABATT)	<input type="checkbox"/> UNLOCKED	<input type="checkbox"/> UNLOCKED
US Food Service	<input type="checkbox"/> UNLOCKED	<input type="checkbox"/> UNLOCKED

Allocation Orders Lock Out Message:

Surplus Orders Lock Out Message:

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.



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**.

Allocation Group Information		ADD
Description:	<input type="text"/>	
Number of Open Orders Allowed:	<input type="text"/>	
Status:	Active <input type="button" value="v"/>	
<input type="button" value="Save"/> <input type="button" value="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:

Number of Open Orders Allowed:

Status:

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:	<input type="text"/>		
Carrier Contact Name:	<input type="text"/>		
Phone:	<input type="text" value="-"/>	Extension:	<input type="text"/>
Fax:	<input type="text" value="-"/>		
Address 1:	<input type="text"/>		
Address 2:	<input type="text"/>		
City:	<input type="text"/>		
State:	<input type="text" value="TX"/> ▾	Zip+4:	<input type="text"/> - <input type="text"/>
FEIN:	<input type="text"/>		
Email:	<input type="text"/>		
<input type="button" value="Cancel"/> <input type="button" value="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**.

Commodities Search/Select

Search for Commodities

Item Number: Commodity Status:

Description: Commodity Group:

Commodity Class:

Commodities

Item Number	Description	Actions
000488	RoastWorks Whole Baby Bakers	Modify Delete Cost
004172	JR Buffalo Sticks ZGTF	Modify Delete Cost
004189	Tater Gems ZGTF	Modify Delete Cost

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**.

Commodity Profile

Item Number: Description:

General Information

Item Number:

Legacy Commodity Code:

USDA URL:

Long Description:

Short Description:

Commodity Group:

Commodity Class:

SVC Code:

UPC Code:

Status:

Storage and Shipping Information

Pack Type: <input type="text"/>	Pack Size: <input type="text"/>
Gross Weight: <input type="text"/>	Net Weight: <input type="text"/>
Truck Load Units: <input type="text"/>	Truck Load Weight: <input type="text"/>
Rail Car Units: <input type="text"/>	Rail Car Weight: <input type="text"/>
Pallet Count: <input type="text"/>	Storage Type: <input type="text"/>
Freight Class: <input type="text"/>	Shelf Life: <input type="text"/> Months

End Product Information

Donated Food(s) Inventory Draw Down

Miscellaneous Information

Allow Processing: Yes No

Include on Annual Survey: Yes No

Variable Weight Material: Yes No

Comments:

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.

Operations > FDP Maintenance > Commodities > Program Year: 2018 - 2019

Commodities Search/Select

Search for Commodities

Item Number:	<input type="text"/>	Commodity Status:	<input type="text" value="Active"/>
Description:	<input type="text"/>	Commodity Group:	<input type="text" value="All Groups"/>
Commodity Class:	<input type="text" value="All Classes"/>		

Commodities

Item Number	Description	Actions
000488	RoastWorks Whole Baby Bakers	Modify Delete Cost
004172	JR Buffalo Sticks ZGTF	Modify Delete Cost
004189	Tater Gems ZGTF	Modify Delete Cost

Figure 202: Commodity Search Screen

4. Select a **year**.

Commodity Costs							VIEW
Item Number: 100212	Description: MIXED FRUIT EX LT CAN-6/10		Commodity Code: A470				
Program Year	Weighted Average Cost	Fixed Cost	Published Cost Per/lb	Processing Fee	Admin. Fee	Alternate Admin. Fee	
2006 - 2007	\$0.00	-	-	-	-	-	
2007 - 2008	\$0.00	-	-	-	-	-	
2008 - 2009	\$0.00	-	-	-	-	-	
2009 - 2010	\$0.00	-	-	-	-	-	
2010 - 2011	\$0.00	-	-	-	-	-	
2011 - 2012	\$0.00	-	-	-	-	-	
2012 - 2013	\$24.90	\$21.27	\$0.53509	\$0.00	-	-	
2013 - 2014	\$27.97	\$21.27	\$0.53509	\$0.00	-	-	
2014 - 2015	\$34.67	\$38.00	\$0.95110	\$0.00	-	-	
2015 - 2016	\$37.22	\$38.00	\$0.95110	\$0.00	-	-	
2016 - 2017	\$30.39	\$33.34	\$0.95110	\$0.00	-	-	
2017 - 2018	\$24.44	\$24.44	\$0.61000	\$0.00	\$0.110	\$0.110	

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**.

Commodity Costs						
Item Number: 100212	Description: MIXED FRUIT EX LT CAN-6/10		Commodity Code: A470			
Program Year	Weighted Average Cost	Fixed Cost	Published Cost Per/lb	Processing Fee	Admin. Fee	Alternate Admin. Fee
2013 - 2014	<input type="text" value="\$27.97"/>	<input type="text" value="\$21.27"/>	<input type="text" value="\$0.53509"/>	<input type="text" value="\$0.00"/>	<input type="text"/>	<input type="text"/>
Created By: EGONZALES On: 12/21/2012 12:59:28 PM Modified By: sharder10 On: 07/28/2014 3:40:10 PM						
<input type="button" value="Save"/> <input type="button" value="Cancel"/>						

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.

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.

Delivery Route Schedule

Program: NSLP
Program Year: 2017 - 2018

1st & 3rd Friday
Delivery Stops: 1st & 3rd Friday

Click on a day to select/unselect a Delivery Date. If an Open order exists for a delivery date, the date cannot be unselected.

July 2017

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

August 2017

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

September 2017

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

October 2017

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

November 2017

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December 2017

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

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: <input type="text"/>	<input type="button" value="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.



Please Note: A delivery route that is being used cannot be deleted.

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**.

Delivery Stop Maintenance		
Delivery Stops		
1st & 3rd Friday	Modify	Delete
1st & 3rd Monday	Modify	Delete
SFSP no set date	Modify	Delete
Weekly	Modify	Delete
<input type="button" value="Add Delivery Stop"/> <input type="button" value=" < Back"/>		

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

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**.



Food Distribution Program Year ADD						
Program Year	Begin Date	End Date	Processor Packet Year	Status		
				Contracting Entity	Processor	State
2019	<input type="text"/> 	<input type="text"/> 	<input type="text"/>	<input type="text" value="Closed"/>	<input type="text" value="Closed"/>	<input type="text" value="Closed"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>						

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**.

Processing Co-op Maintenance			
<input type="checkbox"/> Display Inactive Co-ops			
Processing Co-ops			
Name	Contact	Phone	Action
Choice Partners (G Coast)			Modify Delete
Direct Ship Sch			Modify Delete

Figure 232: Processing Co-op Maintenance Screen

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

Processing Co-op Maintenance ADD

Processing Co-op Name:

Processing Co-op Abbreviation:

Contact First Name: Contact Last Name:

Phone: - Extension:

Fax: -

Address 1:

Address 2:

City:

State: Zip+4: -

Email:

Status:

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:



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

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**.

Commodity Class Maintenance		
Code	Description	Action
BULK	USDA-Donated Foods 4 Further Processing	Modify Delete
DAI	Dairy and Dairy Products	Modify Delete
FRU	Fruits and Fruit Products	Modify Delete
GRA	Grain and Grain Products	Modify Delete
MET	Meats and Meat Products	Modify Delete
MIS	Miscellaneous Products	Modify Delete
PLT	Poultry and Poultry Products	Modify Delete
PRO	Processed Products	Modify Delete
VEG	Vegetables and Vegetable Products	Modify Delete

Figure 235: Commodity Class Information Screen (Partial)

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

Commodity Class Information	
Code:	BULK
Description:	<input type="text" value="USDA-Donated Foods 4 Further Processing"/>
Status:	<input type="text" value="Active"/> ▾
<input style="background-color: red; color: white; margin-right: 10px;" type="button" value=" Save "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/>	

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**.

Commodity Class Information

Code: BULK

Description:

Status:

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**.

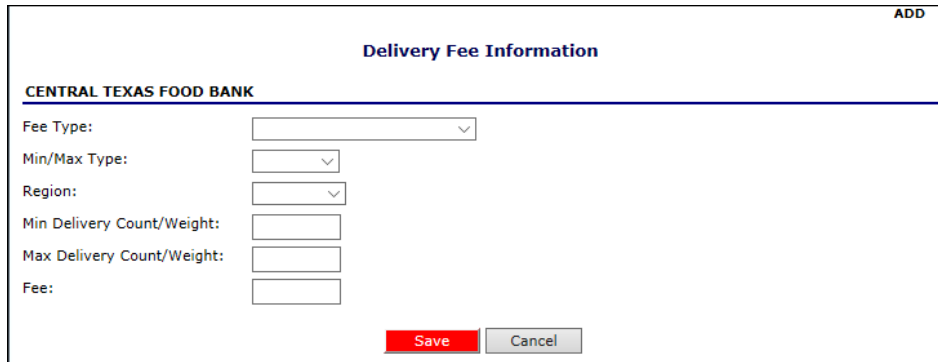
Delivery Fee Schedule

CENTRAL TEXAS FOOD BANK : 2017 - 2018

Fee Type	Region	Description	Minimum	Maximum	Fee
Carrier Delivery	Region 4	Count	1	1	6.410
Carrier Delivery	Region 4	Count	2	2	5.830
Carrier Delivery	Region 4	Count	3	3	5.400
Carrier Delivery	Region 4	Count	4	4	5.040

Figure 238: Delivery Fee Maintenance Screen

5. Select **Add New Fee**.
6. Complete all **Delivery Fee Information**.
7. Select **Save**.
8. Click **Finished**.



ADD

Delivery Fee Information

CENTRAL TEXAS FOOD BANK

Fee Type:

Min/Max Type:

Region:

Min Delivery Count/Weight:

Max Delivery Count/Weight:

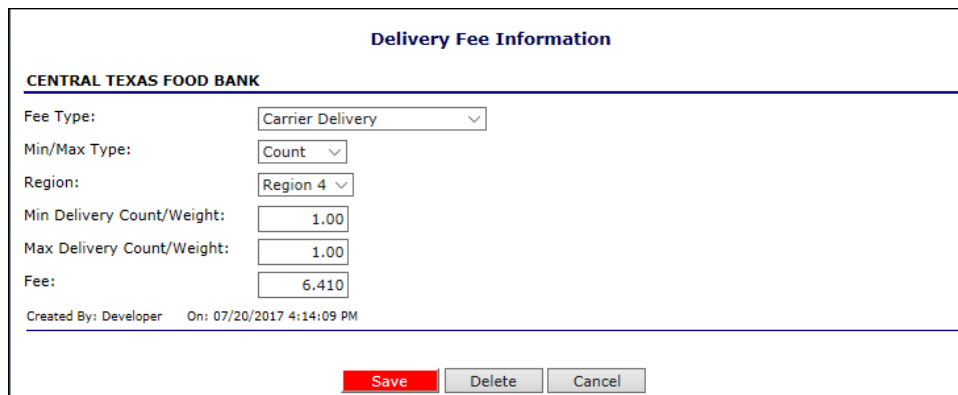
Fee:

Save Cancel

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**.



Delivery Fee Information

CENTRAL TEXAS FOOD BANK

Fee Type:

Min/Max Type:

Region:

Min Delivery Count/Weight:

Max Delivery Count/Weight:

Fee:

Created By: Developer On: 07/20/2017 4:14:09 PM

Save Delete Cancel

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**.



Contact Type	Contact Name	Action
Remit To Contact		Add
Primary Hold/Recall Contact		Modify
Back-up Hold/Recall Contact		Modify
State OSPI Contact		Add
FDP Billing Contact		Add

< Back

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**.

Food Distribution Program State Contact

Contact Information

Contact Type: FDP Billing Contact

Name: First Name M.I. Last Name

Phone: - Ext: Fax: -

Email Address:

Address 1:

Address 2:

City:

State: TX Zip: -

Comments:

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**.

Surplus Request Percent Maintenance

Item Number	Description	Action
5150006611 - 72/2.80	2.8 oz Uncrustable PB & Grape Jelly	Modify
5150006620 - 72/2.80	2.8 oz Uncrustable PB & Strawberry	Modify
C13400 - 72/4.25	2oz Whole Grain Reduced Sodium Gril	Modify

Figure 243: Surplus Requests Percent Maintenance Screen (Partial)

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

Surplus Request Percent Information				
Item Number	Description	Program	Warehouse	Surplus Request Percent
A345	Apple Slices, Cnd - 6/#10	NSLP	Northwest Distribution	100.00 %
A345	Apple Slices, Cnd - 6/#10		Northwest Distribution	100.00 %

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**.

Survey Types Maintenance	
Survey Description	Action
Periodic Survey	Modify
Farm to School Survey	Modify
Hold/Recall Survey	Modify
Processing Survey	Modify
Annual Survey	Modify

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

Figure 246: Food Distribution Program System Defaults Maintenance Screen

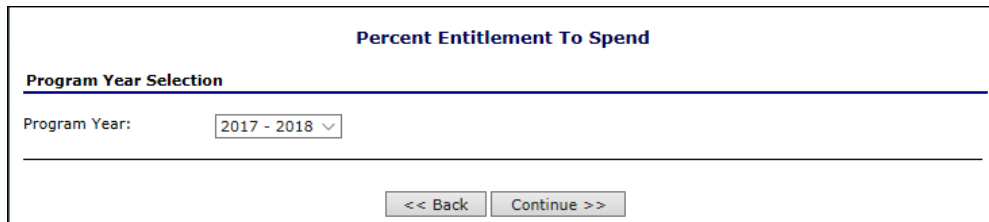
4. Select the **link** for applicable Default.
5. Modify the **Value**.
6. Select **Save**.
7. Click **Finished**.

Default Maintenance		
Default	Description	Value
Invoice_Days_Due	Used to calculate Invoice Due Dates.	<input type="text" value="30"/>

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 >>**.



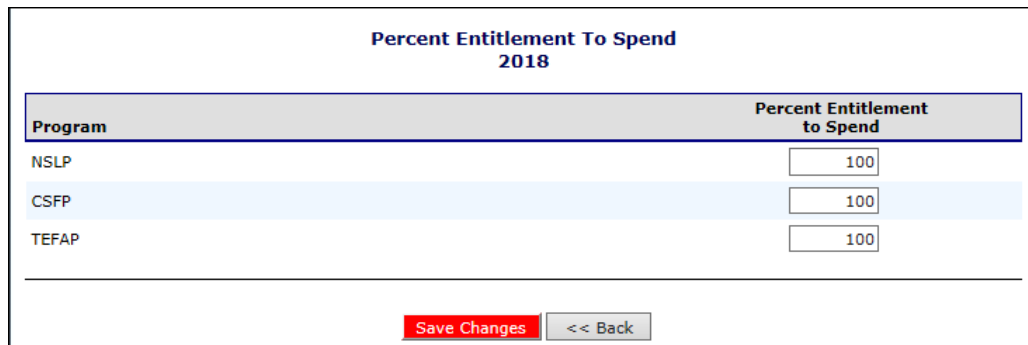
Percent Entitlement To Spend

Program Year Selection

Program Year:

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**.



**Percent Entitlement To Spend
2018**

Program	Percent Entitlement to Spend
NSLP	<input type="text" value="100"/>
CSFP	<input type="text" value="100"/>
TEFAP	<input type="text" value="100"/>

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**.

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

Pre-Allocation Maintenance

Please select a program year:

Click the **LAST CALCULATED** date to view / save the latest Pre-allocation Calculation Report

	Program	Display to CEs	Allocation		Auto Calculation			Last Calculated	Last Calculated By
			Begin Month (mm/yyyy)	Auto	Start Date	End Date	Calculation Day		
Calculate	NSLP	<input checked="" type="checkbox"/>	07	2020	<input checked="" type="checkbox"/>	07/01/2020	06/30/2021	Thursday	09/17/2020 cnp_system
Calculate	SFSP	<input type="checkbox"/>			<input type="checkbox"/>			Sunday	
Calculate	TEFAP	<input type="checkbox"/>			<input type="checkbox"/>			Sunday	
Calculate	CSFP	<input type="checkbox"/>			<input type="checkbox"/>			Sunday	
Calculate	FMNP	<input type="checkbox"/>			<input type="checkbox"/>			Sunday	
Calculate	SFMNP	<input type="checkbox"/>			<input type="checkbox"/>			Sunday	
Calculate	CARES	<input type="checkbox"/>			<input type="checkbox"/>			Sunday	
Calculate	FFCRA	<input type="checkbox"/>			<input type="checkbox"/>			Sunday	
Calculate	Disaster Relief	<input type="checkbox"/>			<input type="checkbox"/>			Sunday	

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**.

USDA Entity Profile

USDA Entity Information

Destination City:

Ship To Party #:

Bond Amount:

Outlets Served: School (SNP) Summer Food Service Other (specify)

Care Of Information

Ship to Party:

Contact:

Address 1:

Address 2:

City:

State: Zip: -

Email Address:

Phone: Ext: Fax:

Delivery Information Same as Care of Information

Warehouse Name:

Delivery Contact:

Address 1:

Address 2:

City:

State: Zip: -

Email Address:

Phone: Ext: Fax:

Miscellaneous Information

Storage Types: Dry Refrigerated Frozen

Handling of Perishable Foods: Shipment Entirely Unloads Partial Shipment Distributed

Ship By: Truck Rail Both

Track:

Delivery Acceptable By: Title Transfer Local Pickup

Limitations:

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**.

Warehouse Maintenance

Search for Warehouses

Warehouse Name:

Warehouse Name	Action
ADVANCEPIERRE FOODS 5003641	View Modify Delete
ADVANCEPIERRE FOODS 5003642	View Modify Delete

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**.

Warehouse Detail

Warehouse Information

Warehouse Name:

Warehouse Type:

USDA Entity:

Status:

Track Inventory By Lot: Yes No

Sort Order:

Contact Information

Name:

Email Address:

Phone: Ext: Fax:

Secondary Contact

Name:

Email Address:

Phone: Ext: Fax:

Mailing Address

Address 1:

Address 2:

City:

State: Zip -

Street Address

Same as Mailing Address

Address 1:

Address 2:

City:

State: Zip -

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

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 >>**.

Order Number	Delivery Location	Warehouse	Delivery Date	Actions
No data available				

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: <input type="text" value="01/04/2018"/>
Delivery Location: CUMBERLAND ACADEMY-DRY	Delivery Type: <input type="text" value="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	<input type="text" value="0"/>	0	<input type="text" value="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	<input type="text" value="0"/>	0	<input type="text" value="0"/>	0
Totals:		0		0	0

Select a page: 1 2 | Page 1 of 2

Delivery Comments:

Entitlement

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

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 >>**.

Open Orders - NSLP			
Contracting Entity: AVINGER ISD			
CE ID: 00166			
Order Number	Delivery Location	Warehouse	Delivery Date
114705	AVINGER ISD	CBBC DALLAS	04/10/2017
			View Modify Delete
<input type="button" value=" < Back"/>		<input type="button" value=" New Order"/>	

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**.

DELETE

Contracting Entity Delivery Order Form - NSLP

Contracting Entity: AVINGER ISD
CE ID: 00166

Order Number: 114705
Batch Number: N/A
Warehouse: CBBC DALLAS
Deliver To: AVINGER ISD
 245 CONNER
 AVINGER, TX 75630

Order Status: Open
Delivery Date: 04/10/2017
Date Entered: 03/02/2017
Entered by: jsmith12
Date Processed:

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
1-15-320-09	Deluxe Flamebroiled Beef Steak Burg	250/2.01	\$0.000	1	0
1-2316-20WG	CF Brd Beef Steak Patties Stick Sha	125/3.72 oz	\$0.000	2	0
5533	FC Spaghetti Sauce with Beef	90.78/5.64	\$0.000	1	0
Totals			\$0.00	4	0
Grand Total			\$0.00	4	0

Created By: jsmith12 On: 03/02/2017 12:57:06 PM
Modified By: jsmith12
On: 03/09/2017 8:55:58 AM

< Back
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**.

Order Inquiry

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

Inquiry Criteria

Program Year:

Program:

Contracting Entity:

CE ID:

Delivery Location:

Delivery Date Range: From: Through:

Display Criteria

Order Status:

Display Orders By: Order Number Commodity

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.

Order Inquiry - NSLP

Contracting Entity: AVINGER ISD
CE ID: 00166

Order Criteria

Delivery Location: All Delivery Locations **Program Year:** 2016 - 2017
Delivery Date Range: N/A **Order Status:** All Orders

Orders

Order Number	Delivery Location	Delivery Date	Order Status	
97943	Activity	AVINGER ISD	09/12/2016	Shipped
99926	Activity	AVINGER ISD	09/12/2016	Shipped
101976	Activity	AVINGER ISD	10/10/2016	Shipped
106169	Activity	AVINGER ISD	11/14/2016	Shipped
109112	Activity	AVINGER ISD	01/09/2017	Shipped
110111	Activity	AVINGER ISD	01/09/2017	Shipped
111980	Activity	AVINGER ISD	02/13/2017	Shipped
114705	Activity	AVINGER ISD	04/10/2017	Open

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

Order Inquiry - NSLP

Contracting Entity: AVINGER ISD
CE ID: 00166

Order Criteria

Delivery Location: All Delivery Locations **Program Year:** 2016 - 2017
Delivery Date Range: N/A **Order Status:** All Orders

Commodities

Item Number	Description	Pack Size	Order Qty
AS164W	Alpha Supreme 16" Whole Grain Peppe	72/6.31	24
100261	APRICOTS FROZEN CUP 96/4.5 OZ	96 / 4.5 OZ	1
1-2316-20WG	CF Brd Beef Steak Patties Stick Sha	125/3.72 oz	15

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.

Contracting Entity Delivery Order Form - NSLP					VIEW
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 245 CONNER AVINGER, TX 75630	Entered by:	jsmith12		
		Date Processed:	09/08/2016		
		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	
<input style="border: none; background-color: #cccccc; padding: 2px 10px;" type="button" value=" < Back "/>					

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.

VIEW

Contracting Entity Order Activity - NSLP

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

Order Information

Order Number: 97943
 Warehouse: CBBC DALLAS
 Delivery Location: AVINGER ISD
 Carrier: CBBC Dallas

Program Year: 2016 - 2017
 Delivery Date: 09/12/2016

Order Activity

Date	Transaction Type	Commodity	Comm Type	Units	Order Type	Entered By	Invoice Number
08/09/2016	Order Entry	5533 FC Spaghetti Sauce with Beef	E	3	A	jsmith12	
08/09/2016	Order Entry	7518 WG Breaded FC Breast Chunks	E	3	A	jsmith12	
09/19/2016	Order Shipment	7518 WG Breaded FC Breast Chunks		3	S	mgonzalez15	
09/19/2016	Order Shipment	5533 FC Spaghetti Sauce with Beef		3	S	mgonzalez15	

Order Types: A = Allocation Commodity Order; S = Surplus Commodity Order or Shipment

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**:
 - Program Year
 - Program
 - Warehouse/Distributor
 - Contract #
 - Commodity
 - Delivery Date Range (Optional)
 - Display Criteria (Order Number or Commodity)
4. Select **Continue >>**.

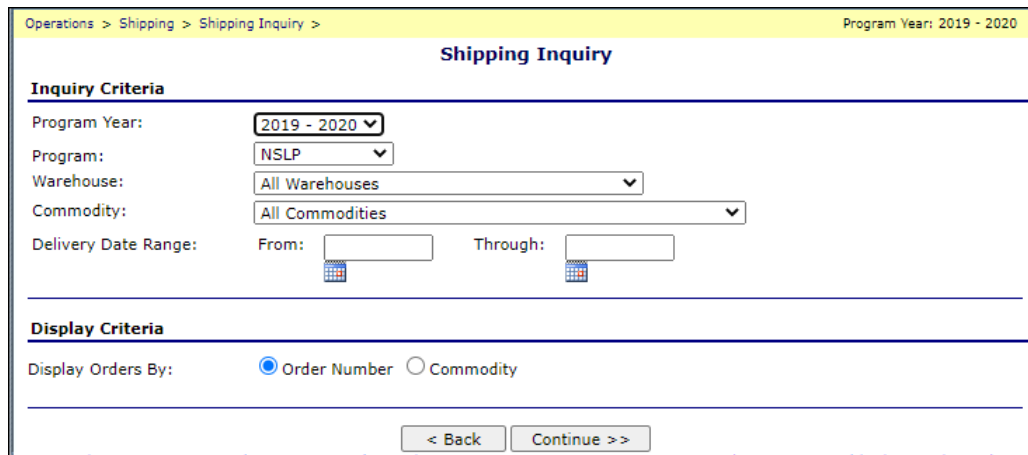


Figure 267: Shipping Inquiry Criteria Screen

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.

Operations > Shipping > Shipping Inquiry > Shipping Inquiry > Program Year: 2019 - 2020

Shipping Inquiry

Order Criteria

Warehouse:	All Warehouses	Program Year:	2019 - 2020
Commodity:	All	Program:	NSLP
Delivery Date Range:	N/A		

Commodities

Order Number	Agency	Total Ordered Qty	Total Shipped Qty	Total Received Qty	Total Damaged Qty
142733	Sample Customer (10)	120	120	120	0
142729	Sample Customer (1001)	25	25	25	0
142730	Sample Customer (1001)	126	126	126	0
142725	Sample Customer (978)	440	358	358	0
142726	Sample Customer (978)	10	10	10	0
142727	Sample Customer (978)	10	4	4	0
142731	Sample Customer (978)	274	270	270	0
142732	Sample Customer (978)	5	1	1	0
Totals:		1,010	914	914	0

[< Back](#)

Figure 268: Shipping Inquiry Results

10. The Agency Order Details are displayed.

Operations > Shipping > Shipping Inquiry > Shipping Inquiry > Agency Order #142733 > Program Year: 2019 - 2020

Agency Order - NSLP VIEW

Order#:	142733	Batch Number:	25836
Warehouse:		Delivery Date:	02/25/2020
Delivery Location:		Carrier:	

Order

Commodity	Total Ordered Qty	Total Shipped Qty	Total Received Qty	Total Damaged Qty
Frye, Swt Potato 1/2" Crinkle Cut - 027812	120	120	120	0
Totals:		120	120	120

Comments:

[< Back](#)

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.

Overages, Shortages & Damages (OS&D) Reporting

Shipment Search

Program Year:

Program:

Contracting Entity:

CE ID:

Order Number: (Optional)

Delivery Date Range: (Optional) From: Through:

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

4. Select **Display Shipments**.

Overages, Shortages & Damages (OS&D) Reporting - NSLP

Contracting Entity: **AVINGER ISD**

CE ID: 00166

Shipment Criteria

Order Number: All Orders **Program Year:** 2016 - 2017

Delivery Date Range: All Delivery Dates

Shipments

Order Number	Delivery Location	Ship Date	Reporting Due Date	Status	Action
111980	AVINGER ISD	02/13/2017	02/18/2017	Not Reported	Report Resolve View
109112	AVINGER ISD	01/09/2017	01/14/2017	Not Reported	Report Resolve View
110111	AVINGER ISD	01/09/2017	01/14/2017	Not Reported	Report Resolve View
106169	AVINGER ISD	11/14/2016	11/19/2016	Not Reported	Report Resolve View
101976	AVINGER ISD	10/10/2016	10/15/2016	Not Reported	Report Resolve View
97943	AVINGER ISD	09/12/2016	09/17/2016	Not Reported	Report Resolve View
99926	AVINGER ISD	09/12/2016	09/17/2016	Not Reported	Report Resolve View

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

5. Select **Report**.

Overages, Shortages & Damages (OS&D) Report - NSLP

Agency: **Hansen S.D. #415**
 Agreement Number: 0415

Shipment Information

Program Year: Delivery Location: Hansen High School
 Order Number: 550 South Main Street
 Ship Date: Hansen, ID 83334

Commodities

Enter the number of undamaged units that were received. Report damaged units received as Units Damaged.

Item Number	Commodity	Pack Size	Units Shipped	Units Received	Units Damaged
A130	Corn Frozen	30#	5	5	0
A350	Applesauce Canned	6/#10	15	15	0

Comments:

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**.

Overages, Shortages & Damages (OS&D) Reporting - NSLP

Contracting Entity: **A CHILD'S IMAGINATION, INC.**
 CE ID: 01757

Shipment Information

Program Year: [] Delivery Location: Hansen High School
 Order Number: 112 550 South Main Street
 Ship Date: [] Hansen, ID 83334

Overages, Shortages & Damages (OS&D) Report

Enter the number of *undamaged* units that were received. Report damaged units received as Units Damaged.

Item Number	Commodity	Pack Size	Units Shipped	Units Received	Units Damaged
A130	Corn Frozen	30#	5	5	0
A350	Applesauce Canned	6/#10	15	13	0

Comments:

Reported By: Developer on: []

Overages, Shortages & Damages (OS&D) Resolution

Please describe how the OS&D issues reported above were resolved.

Resolution:

[]

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**.

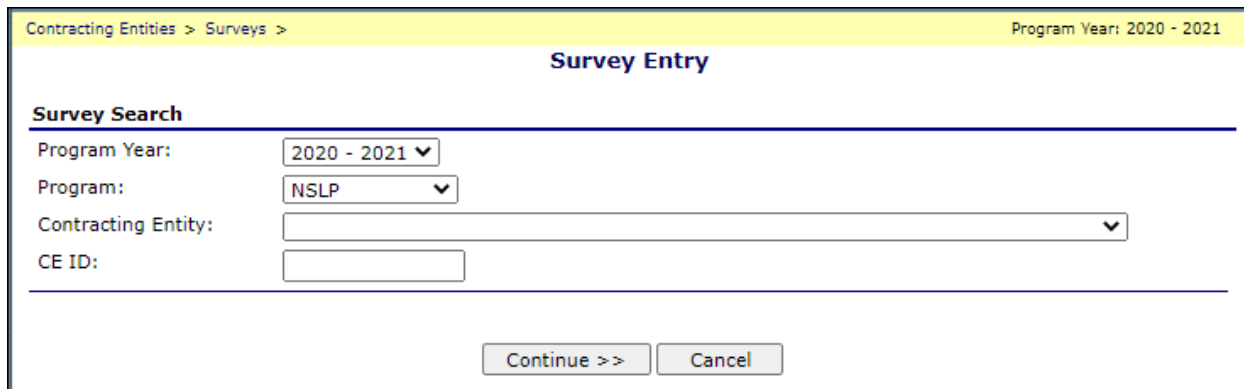


Figure 274: Survey Entry – Survey Search Screen

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

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 will not 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

Figure 276: Commodity Allocations Menu

4.8 Allocation Inquiry

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

Contracting Entities > Commodity Allocations > Allocation Inquiry > Program Year: 2020 - 2021

Allocation Inquiry

Allocation Search

Program Year:	<input type="text" value="2020 - 2021"/>	Allocation Type:	<input type="text" value="All Types"/>
Program:	<input type="text" value="NSLP"/>	Allocation Month:	<input type="text" value="All Months"/>
Contracting Entity:	<input type="text"/>		
CE ID:	<input type="text"/>		

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**.

Allocation Inquiry - NSLP					VIEW
Contracting Entity: ALVIN ISD					
CE ID: 00112					
Allocation Information					
Program Year:	2016 - 2017	Allocation Type:	ALL		
Program:	NSLP	Allocation Month:	ALL		
Allocation Name	Allocation Type	Date Allocated	Allocated	Remaining	
DOD170001	DoD Commitment	02/08/2016	1	0	
HFBK08112016	Annual Survey Fill	08/11/2016	136	0	
HFBK08182016	Annual Survey Fill	08/18/2016	24	0	
HFBK08252016	Annual Survey Fill	08/25/2016	247	0	
HFBK09012016	Annual Survey Fill	09/01/2016	12	0	
SURP99409	Surplus Request	09/01/2016	3	0	

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**.

Commodity Allocation Report							VIEW
CE ID: 00112		Contracting Entity: ALVIN ISD			Allocation Name: HFBK08252016		
					Program: NSLP		
					Year: 2017		
Allocation Date: 08/25/2016				Close Date: 08/25/2016			
Entitlement Commodities							
Item Number	Description	Pack Size	Processing Fee	Alloc Qty	Unit Value	Total Value	
100003	CHEESE CHED YEL SHRED BAG-6/5 LB	6/5 LB BAGS	\$0.00	75	\$57.30	\$4,297.50	
100158	BEEF FINE GRND FRZ-LFT FREE-40 LB	4/10 LB CTN	\$0.00	11	\$95.09	\$1,045.99	
100212	MIXED FRUIT EX LT CAN-6/10	6/#10 CAN	\$0.00	78	\$37.33	\$2,911.74	
100313	CORN WHOLE KERNEL(LIQ) CAN-6/10	6/#10 CAN	\$0.00	83	\$15.45	\$1,282.35	
Total Assistance:				247		\$9,537.58	
Created By: asaenz12 On: Aug 25 2016 4:11PM							
<input style="border: none; background-color: #cccccc; padding: 2px 10px;" type="button" value=" < Back "/>							

Figure 279: Commodity Allocation Report Screen

VIEW

Allocation Inquiry - Allocation Detail

Allocation Information

Program Year: 2016 - 2017	Allocation Type: Surplus Request
Program: NSLP	Allocation Name: SURP99644
Contracting Entity: ALVIN ISD - 00112	Allocation Date: 09/02/2016
Warehouse: All Warehouses	

Item Number	Commodity Description	Commodity Type	Pack Size	Quantity Allocated	Quantity Remaining
110623	BLUEBERRY UNSWT FRZ	Entitlement	CTN 12 / 2.5 LB	191	0
Totals				191	0

Created By: ssmith13 On: Sep 2 2016 1:35PM

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**.

Contracting Entities > Invoices >
Program Year: 2020 - 2021

Invoices

Program Year:	<input type="text" value="2020 - 2021"/>	
Program:	<input type="text" value="NSLP"/>	
Contracting Entity:	<input type="text"/>	
CE ID:	<input type="text"/>	

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						
<input checked="" type="radio"/> Show All Invoices <input type="radio"/> Show Outstanding Invoices Only <small>Any balance over 90 days may result in future distributions being put on hold.</small>						
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	
<input type="button" value=" < 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

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: ▾

Program: ▾

Contracting Entity: ▾

CE ID:

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**.



Please Note: If 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 >>**. The **Contracting Entity's Contract Packet** displays.

Food Distribution Program Contract Packet - NSLP 2016-2017		
Contracting Entity: ALVIN ISD CE ID: 00112		Packet Status: Submitted 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
Delivery Locations:		
Add/Remove Location	ALVIN ISD WAREHOUSE	
View Modify	Warehouse(s): HOUSTON FOOD BANK	
View Modify	Notes (0)	
<input style="margin-right: 10px;" type="button" value=" < Back "/> <input style="margin-right: 10px;" type="button" value=" Submit For Approval "/> <input style="margin-right: 10px;" type="button" value=" Withdraw Packet "/> <input style="margin-right: 10px;" type="button" value=" Terminate Contract "/>		
<input style="margin-right: 20px;" type="button" value=" Approve "/> <input style="margin-right: 20px;" type="button" value=" 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**.



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

VIEW

Commodity Contact Profile

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

Contact Information

Contact Type: Food Service Director

Name:

	First Name	Last Name
	Jennifer	[REDACTED]

Phone: [REDACTED] **Ext:** **Fax:**

Email Address: [REDACTED]

Title: Child Nutrition Director

Address 1: [REDACTED]

Address 2: [REDACTED]

City: Alvin

State: TX **Zip** 77511 -

Comments:

Contact Information Certification

The above contact information is current and correct.

Created By: MMCELHANEY On: 01/08/2016 4:50:21 PM Modified By: ssmich13 On: 02/03/2016 3:42:57 PM

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.

Delivery Location Profile

Contracting Entity: ALVIN ISD
CE ID: 00112

Delivery Location Information

[View Delivery Schedule](#)

Delivery Location Name:

State Vendor #:

Status:

Delivery Location Type:

Address 1:

Address 2:

City:

State: Zip:

County:

Program(s): NSLP SFMNP SFSP FMNP TEFAP CSFP
 Disaster Relief

Contact Information

	First Name	Last Name
Name:	<input type="text" value="JENNIFER"/>	<input type="text"/>
Email Address:	<input type="text"/>	
Phone:	<input type="text"/>	Ext: <input type="text"/> Fax: <input type="text"/>

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.

Contract Entitlement - NSLP

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

Contract Information

Program Year: 2016 - 2017 ▾
 Program: NSLP ▾
 Contracting Entity: ALVIN ISD-00112 ▾
 CE ID:

CE ID	Contracting Entity	TLS	Status	CIL	Entitlement Distribution	Entitlement Used	Entitlement Remaining
00112	ALVIN ISD	2,274,504	Approved	N	\$19.41	\$766,981.57	(\$766,962.16)

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.

Entitlement Distribution Detail - NSLP								
Contracting Entity: ALVIN ISD								
CE ID: 00112								
CE ID	Contracting Entity	TLS	Total TLS	%	Contracting Entity Entitlement	DOD Fresh	DOD Farm to School	Processing
00112	ALVIN ISD	2,274,504	2,274,504	100.00 %	\$19.41	\$165,620.90	\$0.00	\$500,582.90
Totals:		2,274,504	2,274,504	100.00 %	\$19.41	\$165,620.90	\$0.00	\$500,582.90
<input style="border: none; background-color: #cccccc; padding: 2px 10px;" type="button" value=" < Back "/>								

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.

Entitlement Distribution History - NSLP			
Contracting Entity: ALVIN ISD			
CE ID: 00112			
Entitlement	Entitlement Used	Entitlement Remaining	
\$19.41	\$766,981.57	(\$766,962.16)	
Entitlement	Amount	Description/Adjustment	Date
\$0.00	\$0.00		
\$659,663.40	\$659,663.40	Program Distribution	01/22/2016
\$725,162.72	\$65,499.32	Program Distribution	02/03/2016
\$727,863.43	\$2,700.71	Program Distribution	08/09/2016
\$766,982.30	\$39,118.87	Program Distribution	10/19/2016
\$19.41	(\$766,962.89)	Program Distribution	06/01/2017
<input style="border: none; background-color: #cccccc; padding: 2px 10px;" type="button" value=" < Back "/> <input style="border: none; background-color: #cccccc; padding: 2px 10px;" type="button" value=" New Manual Adjustment "/>			

Figure 290: Contract Entitlement – NSLP Screen

5. Select the **Manual Adjustment** link to view the adjustment details.

ADD

Entitlement Distribution Adjustment - NSLP

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

Entitlement	Entitlement Used	Entitlement Remaining
\$19.41	\$766,981.57	(\$766,962.16)

Adjustment Information

Adjustment Amount:

Adjustment Reason:

Created By: Developer
 Adjustment Date: 12/06/2017

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.

Entitlement Usage - NSLP

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

Entitlement	Entitlement Used	Entitlement Remaining
\$19.41	\$766,981.57	(\$766,962.16)

Entitlement	Used	Description	Date
Beginning	\$19.41		
	(\$151.21)	Srvy1953	02/01/2016
	(\$5,208.19)	Srvy1963	02/01/2016
	(\$5,629.19)	Srvy1988	08/10/2016
	(\$171,250.09)	DOD170001	02/08/2016
	(\$342,906.27)	PsrV2031	03/08/2016
	(\$620,814.19)	PsrV2033	03/03/2016
	(\$662,653.53)	PsrV2035	03/03/2016
	(\$667,142.43)	HFBK08112016	08/11/2016

Figure 292: Entitlement Usage – NSLP Screen (Partial)



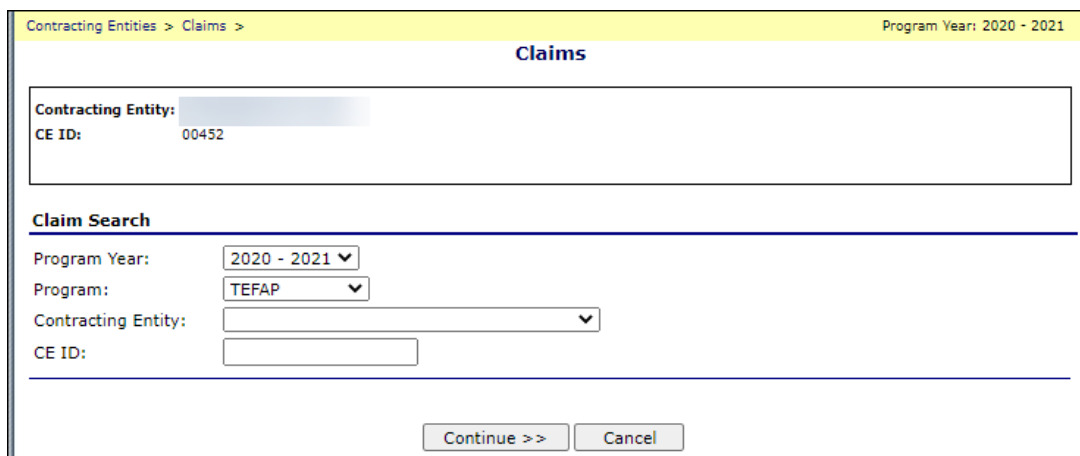
Please Note: For more information on the entitlement screen, reference the Information Sheets.

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 >>**.



Contracting Entities > Claims > Program Year: 2020 - 2021

Claims

Contracting Entity:

CE ID: 00452

Claim Search

Program Year: ▼

Program: ▼

Contracting Entity: ▼

CE ID:

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.

Claims >						Fiscal Year: 2016 - 2017
2016 - 2017 TEFAP & CSFP Claim Year Summary						
Claim Month	Adj Number	Claim Status	Date Received	Date Processed	Earned Amount	
Oct 2016	2	Processed	03/02/2017	03/02/2017	\$346,197.41	
Nov 2016	2	Processed	03/02/2017	03/02/2017	\$420,833.05	
Dec 2016	0	Processed	01/25/2017	03/02/2017	\$71,961.48	
Jan 2017					\$0.00	
Feb 2017					\$0.00	
Mar 2017					\$0.00	
Apr 2017					\$0.00	
May 2017					\$0.00	
Jun 2017					\$0.00	
Jul 2017					\$0.00	
Aug 2017					\$0.00	
Sep 2017					\$0.00	
Year to Date Totals					\$838,991.94	

[< Back](#)

Figure 294: Claims Screen

2. Select **View** under the Claims Items column next to the corresponding claim.

Claim Month: October 2016						
Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View	0	12/08/2016	12/08/2016	01/03/2017	\$272,696.31	Processed
View	1	02/02/2017	02/02/2017	02/23/2017	(\$912.16)	Processed
View	2	03/02/2017	03/02/2017	03/02/2017	\$74,413.26	Processed
Total Earned					\$346,197.41	

[< Back](#) [Add Revision](#)

Figure 295: Claims Screen

3. The **Claim for Reimbursement** screen displays.
4. Select **<Back** to return to the previous screen.

Month/Year Claimed	Adjustment Number	Date Received	Date Accepted	Date Processed	Reason Code
Oct 2016	0	12/08/2016	12/08/2016	01/03/2017	Original

The Emergency Food Assistance Program (TEFAP)	
General Information	
1. Number of Sub-Agencies:	427
2. Number of Sites Participating:	210
3. Total Prepared Meals:	74,856
4. Total Households:	227,686
Cost of Distributing USDA Foods	
5. Storage Facilities:	\$50,400.11
6. Equipment:	\$28,434.05
7. Salaries:	\$144,229.49
8. Transportation:	\$45,641.52
9. Other (explain/itemize):	\$25,445.48
<input type="text" value="Other expenses not included in above categories"/>	
10. Total Cost of Distributing USDA Foods:	\$294,150.65
Approved Reimbursement Amount:	\$211,204.56

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**.

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

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.

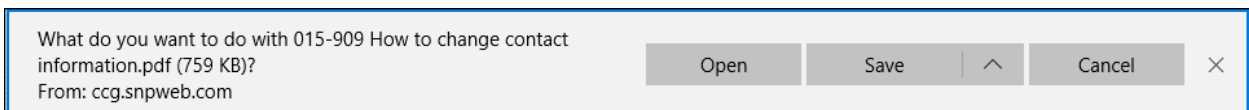


Figure 298: Download Forms Pop-Up Action Box

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 from 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.

Food Distribution Program Reports

Report Filters

Report Group: ALL

Report List

Shipping and Invoicing Reports

Item	Description
Bill of Lading Report	Prints Bills of Lading for a selected Warehouse, Delivery Date, Batch Number or Bill of Lading Number.
County Report	This report displays the total units shipped by county for selected Programs, Contracting Entities, and Shipment Types.
Invoice Batch Report	List of Invoices by Batch Number.
Shipped Recalled Products Report	Displays a list of all Contracting Entities having received recalled commodities from a selected Warehouse.
Total Units Shipped Report	Displays the total Units and total USDA Value shipped to Contracting Entities from a selected Warehouse for a selected Program, Program Year and Program Months.
Warehouse Pick Lists	Warehouse Pick Lists

Survey Reports

Item	Description
Farm To School Survey Report	Displays Farm to School survey results.
Processing Diversion Confirmation	Generates Processing Diversion notifications for all Contracting Entities having commodities diverted in a selected Diversion.
Processor Diversion Notification Report	Generates a Diversion Notification for a selected Processor Diversion.
Processor Survey Report	Displays Processing Survey results for a selected commodity.

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.

Recipient Contracting Entity Contacts Report Parameters

Program Year:	2017 - 2018	
Program:	NSLP	
Warehouse:	All Warehouses	Select Multiple
County:	All Counties	Select Multiple
Contracting Entity Type:	All Types	Select Multiple
Private Co-op (optional):	▼	Select Multiple
Allocation Group:	All Groups	Select Multiple
Contract Status:	All Statuses	Select Multiple
Contact Type:	All Contacts	Select Multiple
Display TLS:	<input type="radio"/> Yes <input checked="" type="radio"/> No	

To select multiple items:

- Click the Select Multiple link for any parameter you wish.
- This will turn the drop down into a list, and the Select Multiple link will disappear.
- Use Ctrl+Click, Click+Drag, or Shift+Click to select one or more items from the list.

Figure 300: Report Parameter – Recipient Contracting Entity Contracts Report

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5.3 Report

Below is an example of a report displayed in SQL Report Services.

County Report			Texas Department of Agriculture 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	

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**.

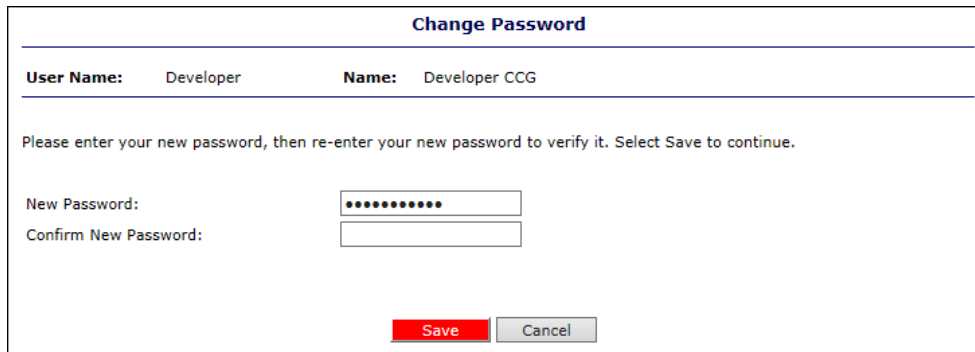


Figure 303: Change Password Screen

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.

User Options

Contracting Entity: **ABERNATHY ISD**
 CE ID: 00452

User Name: **Name:**

Item	Description
User Profile	User Profile
User Associated Group	User Associated Group
User Security Rights	User Security Rights
User Associated Sponsor	User Associated Sponsor
Reset User's Password	Reset User's Password

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.



Please Note: The security rights available to a user depend on the user’s assigned groups. Only the security rights assigned to the user’s assigned groups display in the user’s security rights. To assign additional security rights to a user that are not displayed as options in the user’s security rights, assign the user to a specific group with preferred rights.

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.

Link Account to Specified Sponsors

Contracting Entity: **ABERNATHY ISD**
 CE ID: 00452

User Name: [Redacted]
 Support Staff
 asauced@esc17.net
[806-281-5803](tel:806-281-5803)

Search for Sponsor

CE ID:
 Customer Name:

Sponsor List Found: 82

Check all items

Allow	CE ID	Sponsor Name	Last Updated	Action
<input checked="" type="checkbox"/>	00452	ABERNATHY ISD		Remove
<input checked="" type="checkbox"/>	00710	AMHERST ISD		Remove
<input checked="" type="checkbox"/>	00591	ANTON ISD		Remove
<input checked="" type="checkbox"/>	00095	BORDEN COUNTY ISD		Remove

[bottom](#)

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:

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:

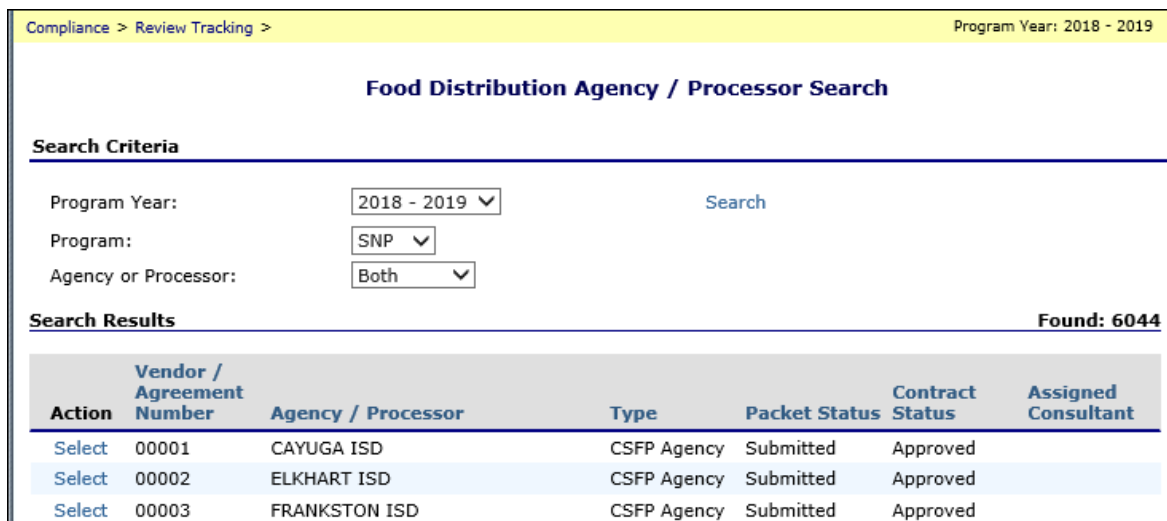
- View review schedules.
- Enter and maintain SFA contact information related to the review.
- Complete select off-site review forms.
- Submit CADs to the State for review.
- View commendation and technical assistance information.
- View notes from the State.
- Attachment documents within the system.

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:

Program:

Agency or Processor:

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](#)

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

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.