



# Student Eligibility

## *User Guide*

Cybersoft PrimeroEdge is a leading provider of software solutions to Child Nutrition Departments in K-12 school districts and State Agencies across the nation. This user guide provides a reference and reinforcement of Student Eligibility tasks for all users. The user should have basic computer knowledge.

Cybersoft Technologies  
4422 FM 1960 W Suite 400  
Houston, TX 77068

[www.primeroedge.com](http://www.primeroedge.com)

 <https://www.facebook.com/PrimerEdge>

 <https://www.linkedin.com/company/primeroedge>

 <https://www.youtube.com/user/primeroedge>

Copyright © 2018 Cybersoft Technologies, Inc.

All rights reserved. No part of this manual shall be reproduced, stored in a retrieval system, or transmitted by any means, electronic, mechanical, photocopy, recording, or otherwise, without the written permission from Cybersoft Technologies. No patent liability is assumed with respect to the use of the information contained herein. Although every precaution has been taken in the preparation of this manual, Cybersoft Technologies assumes no responsibility for errors or omissions.

## DISCLAIMER

---

Every effort has been made to make this manual as complete and as accurate as possible, but no warranty or fitness is implied. The information provided is on an as is basis. Changes made to the product may not be reflected in this manual. Cybersoft Technologies shall have neither liability nor responsibility for any loss or damages arising from the use of information contained in this manual.

Cybersoft Technologies shall have neither liability nor responsibility for any loss or damages arising from the use of information contained in this publication.

## About This Guide

The **About This Guide** section introduces you to the PrimeroEdge suite of products developed to help school nutrition professionals with their tasks to provide quality meal service for students while supporting prudent fiscal responsibility in cafeteria operations.

This section offers information on:

- PrimeroEdge software solutions
- Student Eligibility module
- Purpose of this guide
- Document conventions and special icons used in this guide

## PrimerEdge Software Solutions

Cybersoft PrimerEdge is a leading provider of software solutions to Child Nutrition Departments in K-12 school districts and State Agencies across the nation. At the School Food Authority (SFA) level, these solutions (called “modules”) include

- Point of Service (POS)
- Menu Planning
- Financials
- Student Eligibility
- Production
- Bid Analysis
- Team Work
- Inventory

The Student Eligibility module provides functions to accept and process Free and Reduced-Price Meals applications. Assignment of the highest-possible eligibility is immediate.

## Purpose of this Guide


The *Student Eligibility User Guide* is a quick-reference guide to functions learned in our training classes led by Customer Coaches and reviewed with your Customer Success Mentor. Refer to this user guide when you have questions regarding specific module features and functionalities.

This user guide includes step-by-step instructions and screenshots for PrimerEdge tasks. For in-depth descriptions and information regarding each module within PrimerEdge, see the training manual, *Navigating PrimerEdge*.



## Document Conventions

This document uses the following conventions:

- **Bold:** Represents keyboard key names, such as **Tab** or **Enter**, or clickable buttons on the screen, such as **Apply** or **Reset**.
- *Italics:* Represents messages shown by PrimeroEdge, such as *User has been added successfully*.
- Buttons: Represented by bold print, such as **Apply**, and/or an icon, such as **Calendar** ().
- Selection Sequences: To access a PrimeroEdge function, selection sequences are represented with this notation:

Module name > Menu name > Menu selection

to indicate which PrimeroEdge element to click and the order in which to click the element.

Example:      Student Eligibility > Patrons > Students

Indicates to access the Students function by clicking the Student Eligibility module tab, then clicking the Patrons menu name, and then clicking the Students menu selection.

## Special Icons

Icons in this document alert the reader to special information.

- ✓ Indicates a helpful tip.
- ▲ Indicates critical task information.
- Indicates a status note.

**Table of Contents**

Chapter 1: Getting Started..... 9  
*Log In to PrimeroEdge*.....10  
*Navigating the Dashboard* ..... 11  
*Using List Display Controls* .....15  
*Using Lookup*.....16  
*Log Out of PrimeroEdge* ..... 17

Chapter 2: Applications ..... 19  
*Scan*..... 20  
*Manual Entry* ..... 27  
*Validate*..... 42  
*Notify* ..... 55  
*Smart Bin*..... 58  
*Master Index*..... 67

Chapter 3: Administration ..... 77  
*Direct Approvals* ..... 78  
*DC Matching*..... 92  
*Grace Period Letters*..... 102  
*Household Letters*.....105

Chapter 4: Patrons ..... 109  
*Students* ..... 110

Chapter 5: Application Reports..... 125  
*All Reports* .....126  
*Application Approval List* .....127  
*Application Processing*.....129  
*Audit Trail* .....132  
*Expiring Approvals* .....133  
*Batch Cover Sheet*.....134  
*Direct Approval Confirmation*.....135

Chapter 6: Eligibility Reports ..... 137  
*Expired Eligibility* .....138  
*Other Benefits* ..... 140  
*Benefits Issuance* .....142  
*Eligibility Roster*.....144  
*Eligibility Summary* .....146  
*Student Status Change* .....148  
*CEP Identified Students*.....150  
*Percent Economically Disadvantaged*.....152

<i>DC Sibling</i> .....	154
<i>Student Activity</i> .....	156
<b>Chapter 7: Verification</b> .....	<b>158</b>
<i>Sampling</i> .....	159
<i>Tracking</i> .....	162
<i>Reports</i> .....	174
<i>Collection Report</i> .....	181
<i>Reapplying After Verification</i> .....	184
<b>Chapter 8: Reviews</b> .....	<b>189</b>
<i>Manage Reviews</i> .....	190
<i>Review Applications</i> .....	193
<b>Chapter 9: Configuration</b> .....	<b>204</b>
<i>DC Precedence</i> .....	205
<i>Eligibility Descriptions</i> .....	206
<i>Other Benefits</i> .....	207
<i>Application Mapping Tool</i> .....	210
<i>Eligibility Imports</i> .....	214
<i>Languages</i> .....	217
<i>Eligibility Guidelines</i> .....	219
<i>Letter Templates</i> .....	221



« This page intentionally left blank »



## **Chapter 1: Getting Started**

The **Getting Started** chapter introduces you logging into PrimeroEdge, opening the Student Eligibility module, and using common features used in the module.

In this chapter you will learn how to

- Log in to PrimeroEdge
- Navigate to and open the Student Eligibility module in the Dashboard screen
- Use list display controls
- Use Lookup
- Logout of PrimeroEdge

## Log In to PrimeroEdge

On the PrimeroEdge Login page:

1. In **Username**, enter your Username.
2. In **Password**, enter the password associated with your username.
3. Click **Login**.



PrimeroEdge

Username

Password

Login

---

### Usernames

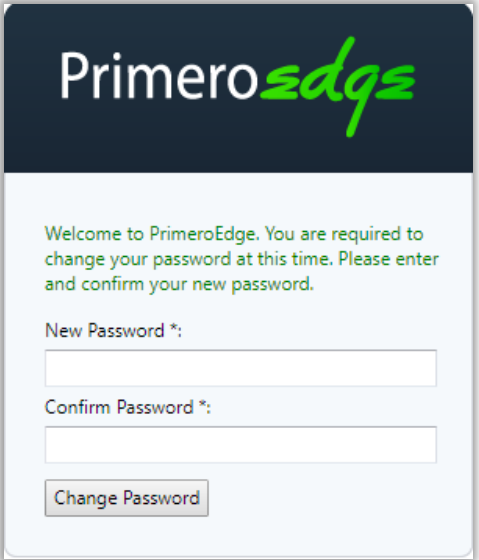
Usernames are set up to access a set of modules and functions that correspond to your work role with PrimeroEdge. Therefore, when you log in to PrimeroEdge, you may see a subset of the menus shown in this manual, or you may not see all of the features reviewed for a function.

---

### Passwords

The first time you log in, you are directed to change your password. You will

1. In New Password, enter a new password string.
2. In Confirm Password, re-enter the same password string.
3. Click **Change Password**.



PrimeroEdge

Welcome to PrimeroEdge. You are required to change your password at this time. Please enter and confirm your new password.

New Password \*:

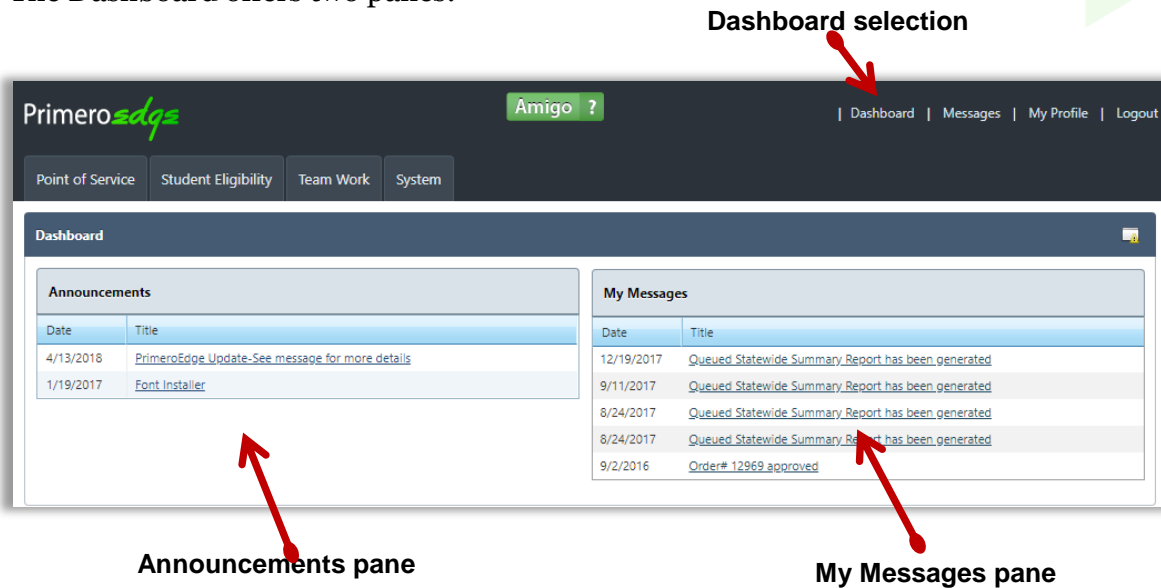
Confirm Password \*:

Change Password

## Navigating the Dashboard

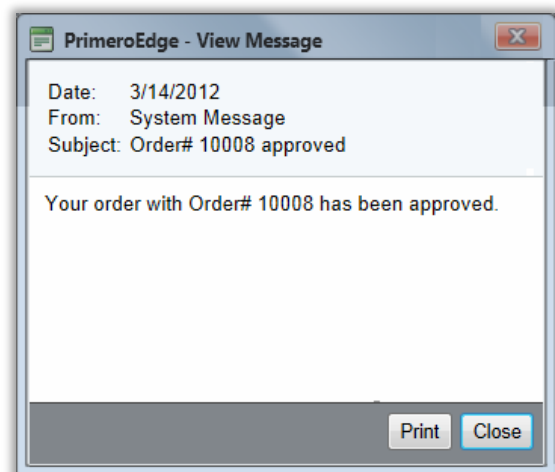
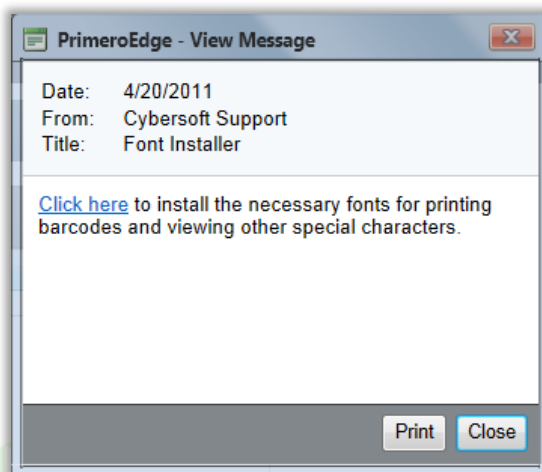
The Dashboard screen appears after a successful login. This screen is accessed at any time by clicking **Dashboard** on the top navigation menu.

The Dashboard offers two panes:



1. Announcements – general messages for all PrimeroEdge users
2. My Messages – specific messages to you about items in PrimeroEdge

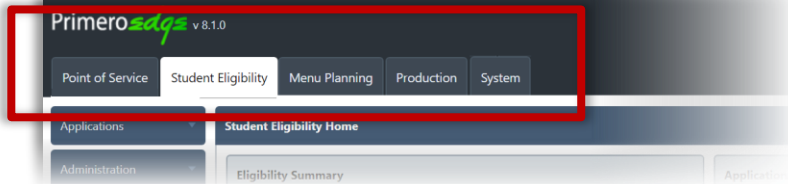
Clicking a link in the **Title** column in either pane displays the View Message dialog. Once the announcements box is opened, you can print the message or exit the box.



## Modules, Menus, & Menu Selections

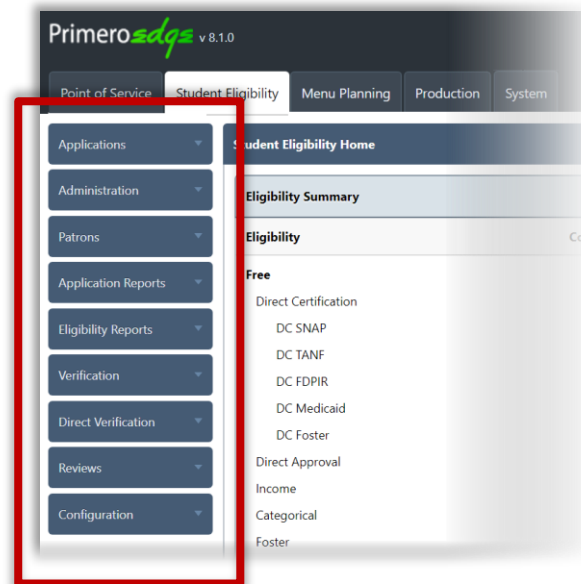
The PrimeroEdge screen offers:

- **Modules**—distinct areas of functionality, such as Student Eligibility, that offer functions to work with related tasks; modules are represented with “tabs” that appear across the top of the PrimeroEdge screen. Clicking a tab accesses or opens the module. The active module tab appears in white with black lettering.



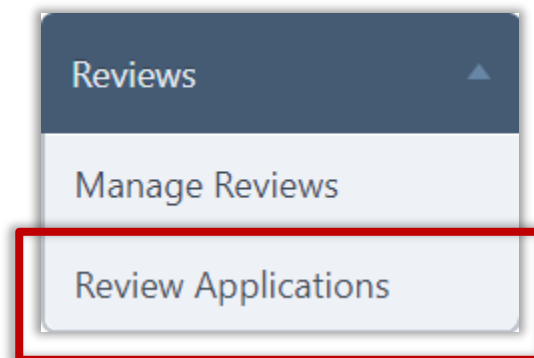
- **Menus**—clicking a module tab displays a vertical list of menu names on the left side of the screen; menus offer a collection of related functions.

This image shows the menus available in the Student Eligibility module.



- **Menu Selections**—clicking a menu name displays a set of related menu selections or functions.

Click a menu selection to work with tasks provided by the individual function.



PrimeroEdge has been optimized for use with the Internet Explorer browser. Some module features may be limited when using other browsers.



### Navigate to Student Eligibility Module

When you log in to PrimeroEdge, you see one or more food services solutions that your district has chosen to use. You will see one tab for each module.

#### To open the Student Eligibility module

- Click the Student Eligibility tab.

The Student Eligibility Home screen lists menus in the vertical menu navigation bar on the left of the screen.

#### Menu navigation bar

#### Student Eligibility tab (module)

Eligibility	Count	Percentage
<b>Free</b>	43	41.35%
Direct Certification	9	8.65%
DC SNAP	0	0.00%
DC TANF	9	8.65%
DC FDPiR	0	0.00%
DC Medicaid	0	0.00%
DC Foster	0	0.00%
Direct Approval	3	2.88%
Income	3	2.88%
Categorical	0	0.00%
Foster	2	1.92%
Other	26	25.00%
<b>Reduced</b>	7	6.73%
Direct Certification	0	0.00%
DC Medicaid	0	0.00%
Income	0	0.00%
Other	7	6.73%
<b>Total Needy</b>	<b>50</b>	<b>48.08%</b>
<b>Paid</b>	54	51.92%
Not Applied	54	51.92%
Denied	0	0.00%
Other	0	0.00%
<b>Total Enrolled</b>	<b>104</b>	

Entry Method	Count	Percentage
Scanned	0	0.00%
Online	1	20.00%
Manual	4	80.00%
<b>Total</b>	<b>5</b>	<b>100.00%</b>

The *Student Eligibility Home* page displays two groups of information:

- **Eligibility Summary**—lists counts and percentages for each meal eligibility with total enrollment.
- **Applications**—lists the number of applications accepted through manual entry, scanning and website entry.

The **Student Eligibility** module offers eight (8) menus with multiple functions on each menu in the menu bar on the left.

- ▲ Menus and menu functions to which you have access are those that are appropriate for your role with PrimeroEdge. Therefore, when you log on to PrimeroEdge, you may see a subset of the menus shown on the previous page, or you may not have access to all of the functions that are reviewed in this manual.

## Using List Display Controls

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

The screenshot shows the 'Students' application interface. At the top, there are search filters for Site Code, Site (set to 'ELEMENTARY SCHOOL'), and Grade (set to '--ALL--'). Below these are radio buttons for 'Student ID/SSN', 'PIN', and 'State ID'. There are also input fields for Last Name and First Name, and a date field for Birth Date. A 'Status' dropdown is set to 'Active'. 'Apply' and 'Reset' buttons are at the bottom of the filter section.

The main section is a table titled 'Students' with an 'Add ...' button. The table has columns: Student ID/SSN, Last Name, First Name, Site, Grade, Birth Date, Eligibility, Status, and Balance. The table contains 12 rows of student data.

At the bottom of the table are pagination controls: a set of navigation arrows, a page number '22' (highlighted), and a 'Page size: 10' dropdown. To the right, it says '663 items in 67 pages'.

Click to display the first page of listings

Click to display the previous page of listings

Click to display a specific page of listings

Click to display the next page of listings

Click to display the last page of listings

Select a number in **Page size:** to change the number of listings displayed on a page

The total number of items (listings) and the total number of pages of listings is shown

## Using Lookup

Several functions, such as Applications>Smart Bin>Pending Students, include the Lookup feature that allows you to search for a patron when the Patron ID is not known. The Lookup feature is represented with a button labeled “Look Up”, “Lookup” or “...”.

### To use Lookup

1. Click **Lookup**.
2. Enter or select search conditions/criteria in the Lookup popup and click **Search**.
3. Click a listing to highlight/select it and click **OK**.

The selected patron appears.

Student ID	Last Name	First Name	Site Code	Grade	Birth Date	Application	Application Status	Matched	Look Up
39401		ASHLEY	0231	1	2004	1456	Partially Validated	✓	...

## Log Out of PrimeroEdge

Logging out of PrimeroEdge can be performed from any page.

### To log out of PrimeroEdge

- Click **Logout**.

Logout

The screenshot shows the 'Student Eligibility Home' page in the PrimeroEdge system. The top navigation bar includes 'Dashboard', 'Messages', 'My Profile', 'Training', and 'Logout'. A red arrow points to the 'Logout' link. The main content area is divided into two tables: 'Eligibility Summary' and 'Applications'.

Eligibility	Count	Percentage
<b>Free</b>	52	1.53%
Direct Certification	11	0.32%
DC SNAP	2	0.06%
DC TANF	9	0.26%
DC FPIR	0	0.00%
DC Medicaid	0	0.00%
DC Foster	0	0.00%
Direct Approval	0	0.00%
Income	30	0.88%
Categorical	5	0.15%
Foster	0	0.00%
Other	6	0.18%
<b>Reduced</b>	11	0.32%
Direct Certification	0	0.00%
DC Medicaid	0	0.00%
Income	11	0.32%
Other	0	0.00%
<b>Total Needy</b>	<b>63</b>	<b>1.85%</b>
<b>Paid</b>	3,343	98.15%
Not Applied	3,333	97.86%
Denied	1	0.03%
Other	9	0.26%
<b>Total Enrolled</b>	<b>3,406</b>	

Entry Method	Count	Percentage
Scanned	0	
Online	0	
Manual	0	
<b>Total</b>	<b>0</b>	

The PrimeroEdge Login page is displayed.

A log out success message appears.

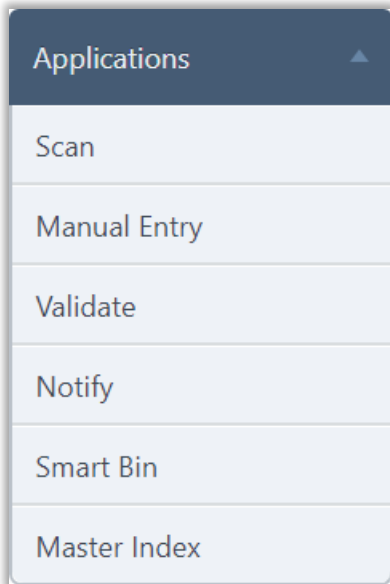
The screenshot shows the login page with a success message: 'You have been successfully logged out of PrimeroEdge.' Below the message are input fields for 'Username' and 'Password', and a 'Login' button.



*« This page intentionally left blank »*



## Chapter 2: Applications

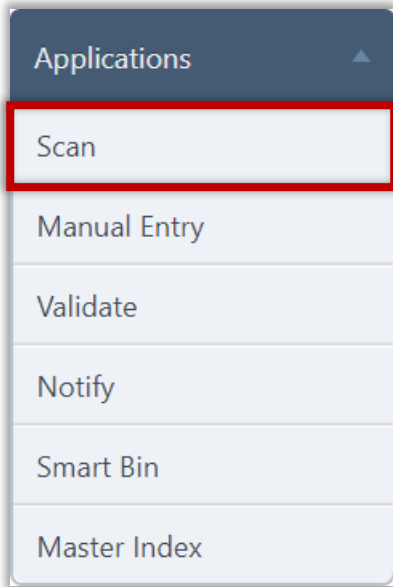


The **Applications** menu (first menu in the Student Eligibility module) offers methods of accepting and processing Free and Reduced-Price Meal benefits applications, and notifying applicants. Two menu selections offer access to all applications or only those that require further analysis to complete assignment of eligibility.

In this chapter you will learn how to

- Scan meal eligibility applications.
- Manually enter a student application.
- Validate meal eligibility applications.
- Notify applicants regarding eligibility.
- View and update applications in the Smart Bin.
- Search for and view any application through the Master Index.

Scan



**Scan** converts paper application data from written to digital format, checks for completeness of data listed on the application, and then stores the scanned information.

Scanning is performed on a computer with a scanner directly attached to it. Batches to be scanned can include 25 or less applications of one page in length.

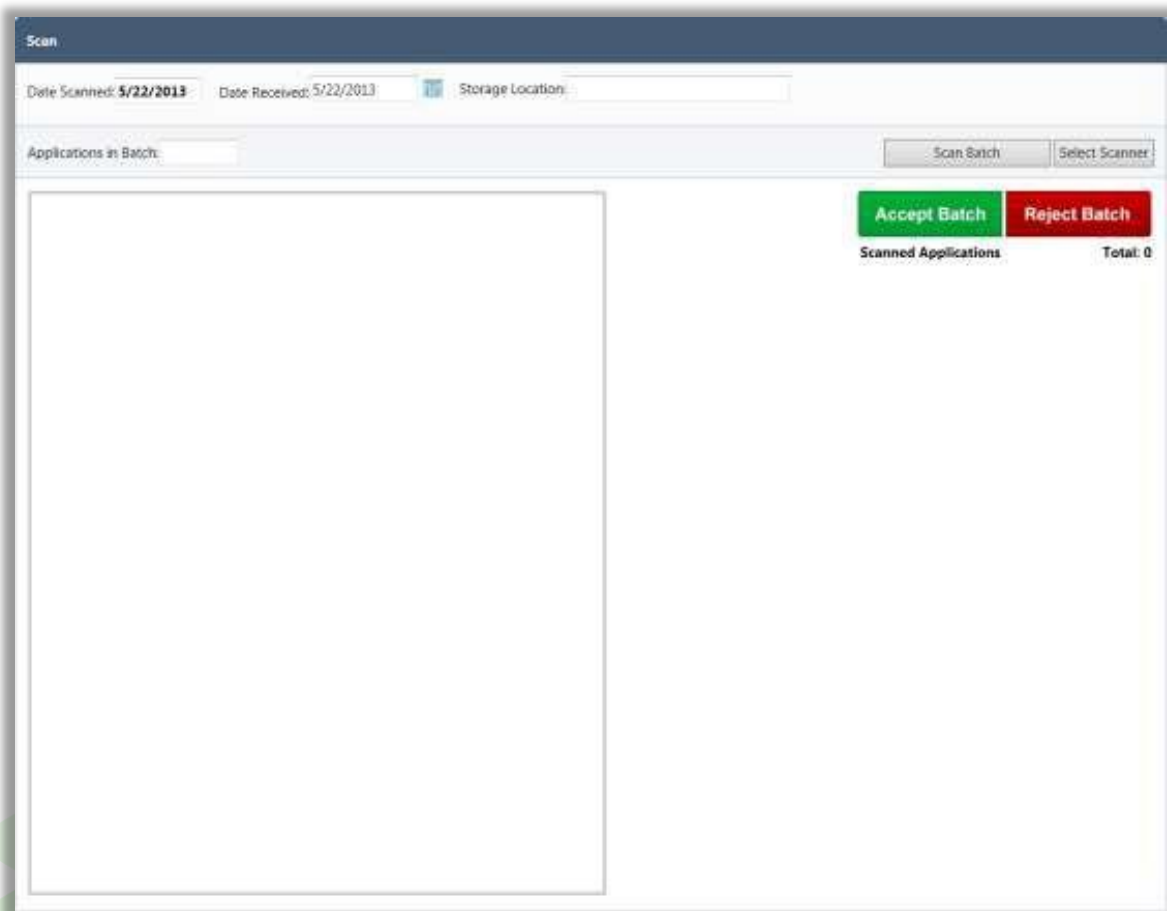


## Prepare Batch

### To prepare a batch of applications for processing

1. Remove instructional page(s) if still attached.
2. Remove all staples or paperclips. Notes or documents attached to an application can be scanned in later. See page 75 for instructions to add documents.
3. Group applications in batches of 25 or less.
4. A batch can be as small as a single application.
5. Ensure that all applications are facing the same direction.
6. Place the batch of applications in the scanner feeder/input tray face down with the barcode face up.

See your scanner instruction manual for more information.

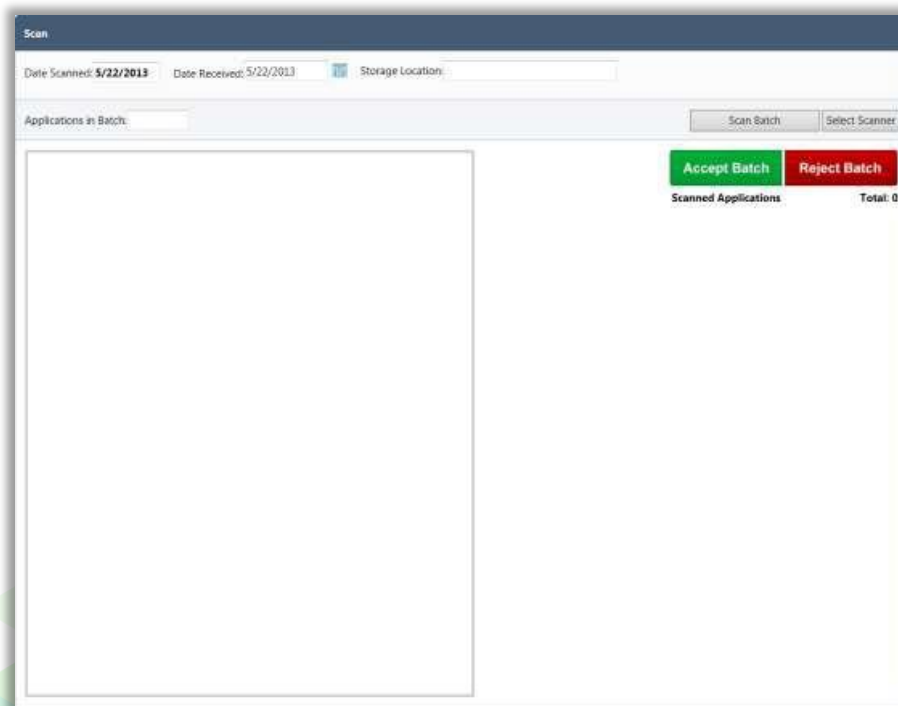


---

## Scan Applications

### To scan an application

1. In Date Received, enter / select a date if the applications were not received on the current date (optional).
2. In Storage Location, enter the physical location of the paper applications, i.e., Cabinet A, Drawer 3 (optional).
3. In Applications in Batch, enter the number of applications you have prepared for the batch.
4. Click **Scan Batch**.
  - **Date Scanned** automatically records the current date.
  - Batches must be scanned with a scanner directly connected to the computer.
  - The documents in the scanner feeder/input tray are scanned one at a time.
  - Each application is numbered and shown in the Scanned Applications list.
  - The number displayed at this time is simply a scanning order number. This *will not be* the true application number.



The screenshot shows a web application interface titled "Scan". At the top, there are input fields for "Date Scanned: 5/22/2013", "Date Received: 5/22/2013", and "Storage Location:". Below these is an "Applications in Batch:" input field. To the right of this field are two buttons: "Scan Batch" and "Select Scanner". Below the input fields is a large empty rectangular area for the scanned applications list. To the right of this area are two buttons: "Accept Batch" (green) and "Reject Batch" (red). Below these buttons, the text "Scanned Applications" and "Total: 0" is displayed.

### Previewing Applications

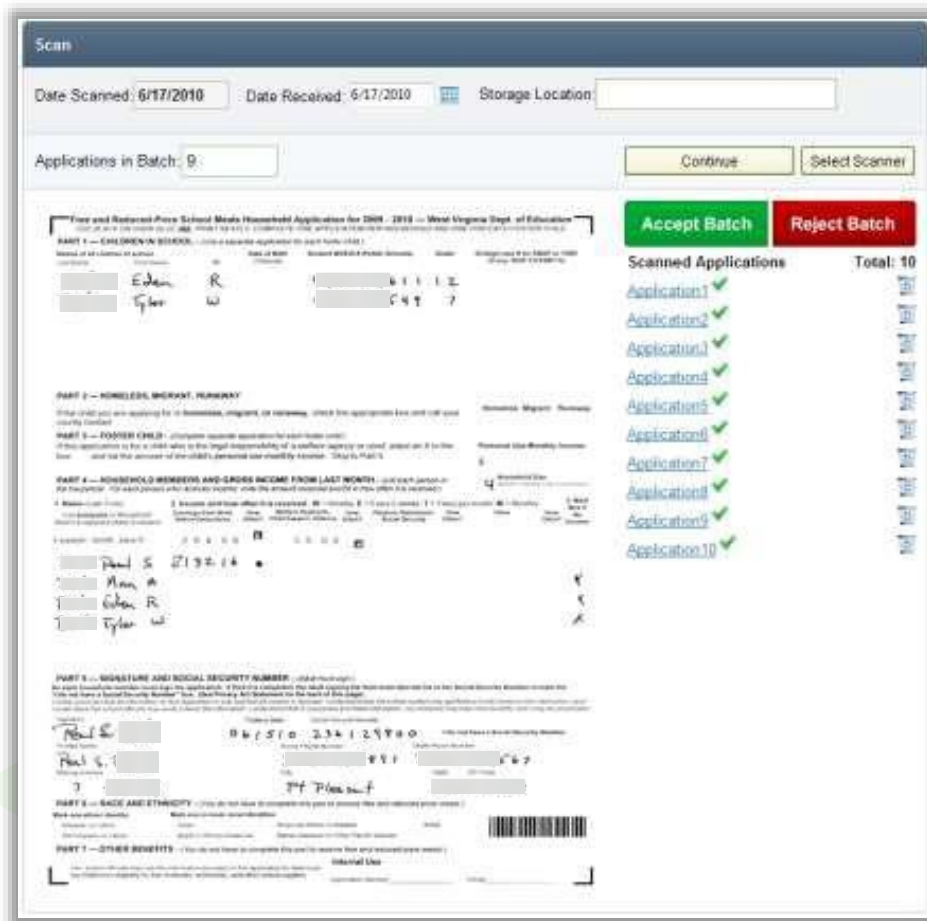
After scanning a batch of applications, each scanned application is listed in **Scanned Applications** and named “**Application#**” where the number is a temporary number and indicates the application’s order in the batch.

The scan status of each application is indicated with either:

- A green check mark ( ✓ ) by **Application#** indicates that the application scan was successful.
- A red X ( ✗ ) by **Application #** indicates that the:
  - \* Barcode is inaccurate for the current year, or
  - \* Application is unreadable. Before accepting a batch:

You should

- Click **Application#** to view each scanned application to ensure the application is:
  - \* Facing the right direction.
  - \* Not blank.
  - \* Viewable.



## Troubleshooting Scans

When **Scanned Applications Total** differs from the number entered in **Applications in Batch**, an error message appears.

This may indicate a misfeed, an incorrect count, or simply a typo.

- If an incorrect count occurred, change the number entered in **Applications in Batch**.



- If a misfeed occurred, place the missing application in the scanner and click Continue.

A red X (✖) by an **Application #** indicates that either the:

- Barcode is inaccurate for the current year, or
- Application is unreadable.

To correct

- Click **Delete** (🗑️) in the application listing to remove it from the batch.
- Change the number entered in **Applications in Batch**.

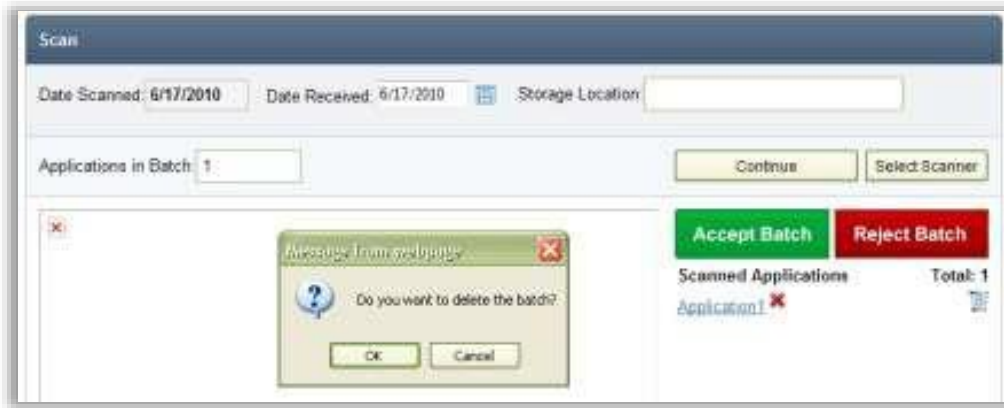


**Accept Application Batch**

When all applications have been reviewed and determined to be correct:

- Click **Accept Batch**.

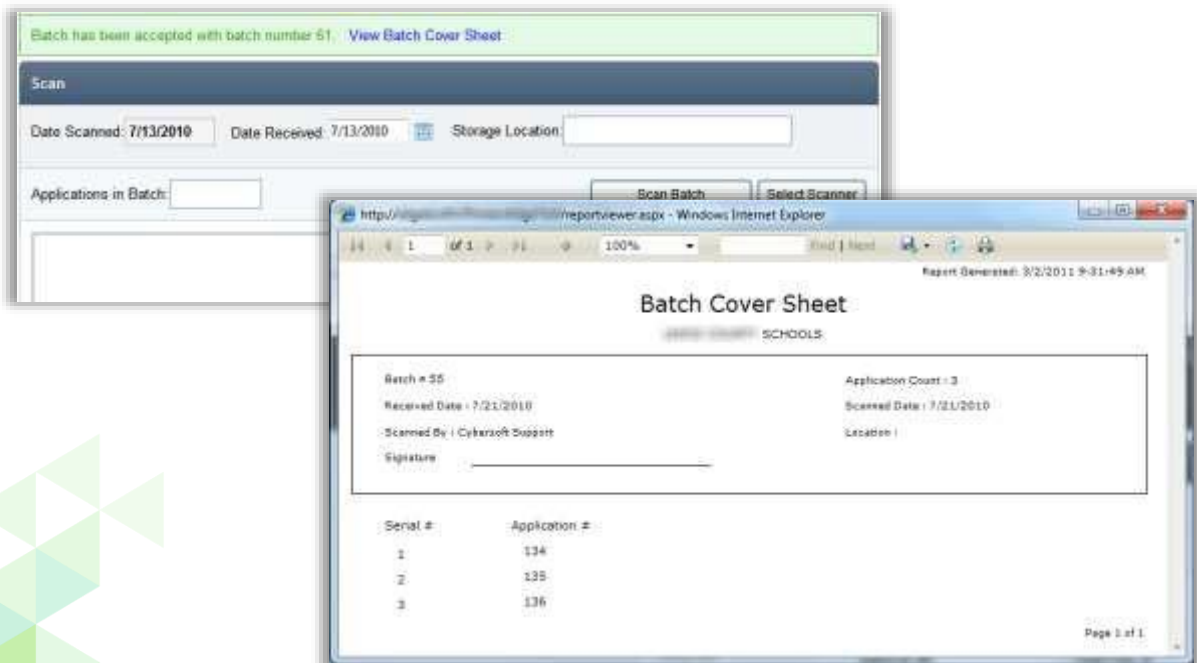
The digital image of each application is saved and assigned a permanent number. An automatically-generated batch number is assigned when the batch is accepted.



On the **Scan** page in the acceptance message:

- Click **View Batch Cover Sheet**.
- Sign the cover sheet and paper clip it to the batch.

The Batch Cover Sheet report lists each scanned application’s permanent number as well as the application’s order in the batch.



### **Reject Application Batch**

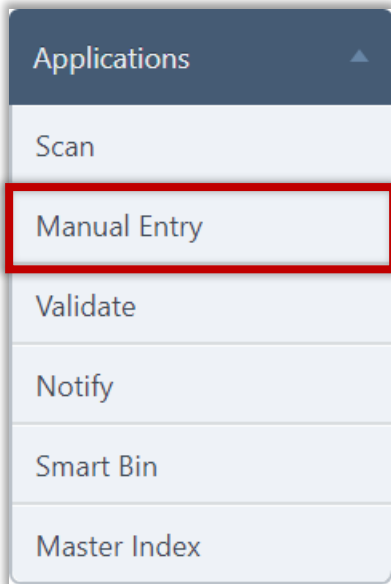
If the batch is unacceptable:

- Click **Reject Batch**.

A confirmation message appears to verify the rejection.

- Click **OK**.

## Manual Entry



**Manual Entry** provides a method for entering a meal application manually in PrimeroEdge. In this situation, the parent/guardian has completed a paper application but the paper application is not scanned into PrimeroEdge. After the information has been entered into PrimeroEdge, the paper application is retained for future audits.

All applications in the most recent batch *for the current date* are listed. A new batch is created when the

- Current batch includes 10 applications. A batch of manually-entered applications can include from 1 to 10 applications. If an 11<sup>th</sup> application is entered, a new batch is automatically created and the new application becomes the first application in the new batch.
- Calendar date changes. For example, if you manually enter 5 applications on Monday they are all placed in Batch #1. On Tuesday, the first application entered manually is placed in Batch #2.

**Add Application with Manual-Entry**

A manual-entry application is added using the **Validate** window, also called the Validation Workspace. This window includes:

- Students group where student(s) are added from the application.
- Household Members group where all people living at the residence listed on the application are added.
- Details group where application details, such as Social Security Number (SSN) and signature are recorded.

**Students**
Add Household...

ID	Birth Date	Site	Direct Approval		
<input type="text" value="..."/>	1/1/1900		Foster		
<input type="text" value="..."/>					

Case #  SNAP ▼

**Household Members**
Optional Info... Guardian Info ... Add Member ...

Name	Income Type	Income Amount		
No records to display.				

Household Size:  Total Income (Y) **\$0.00**

Applicant SSN:  ⚠  No SSN ⚠  Signature ⚠ Language: English ▼

Correction Required

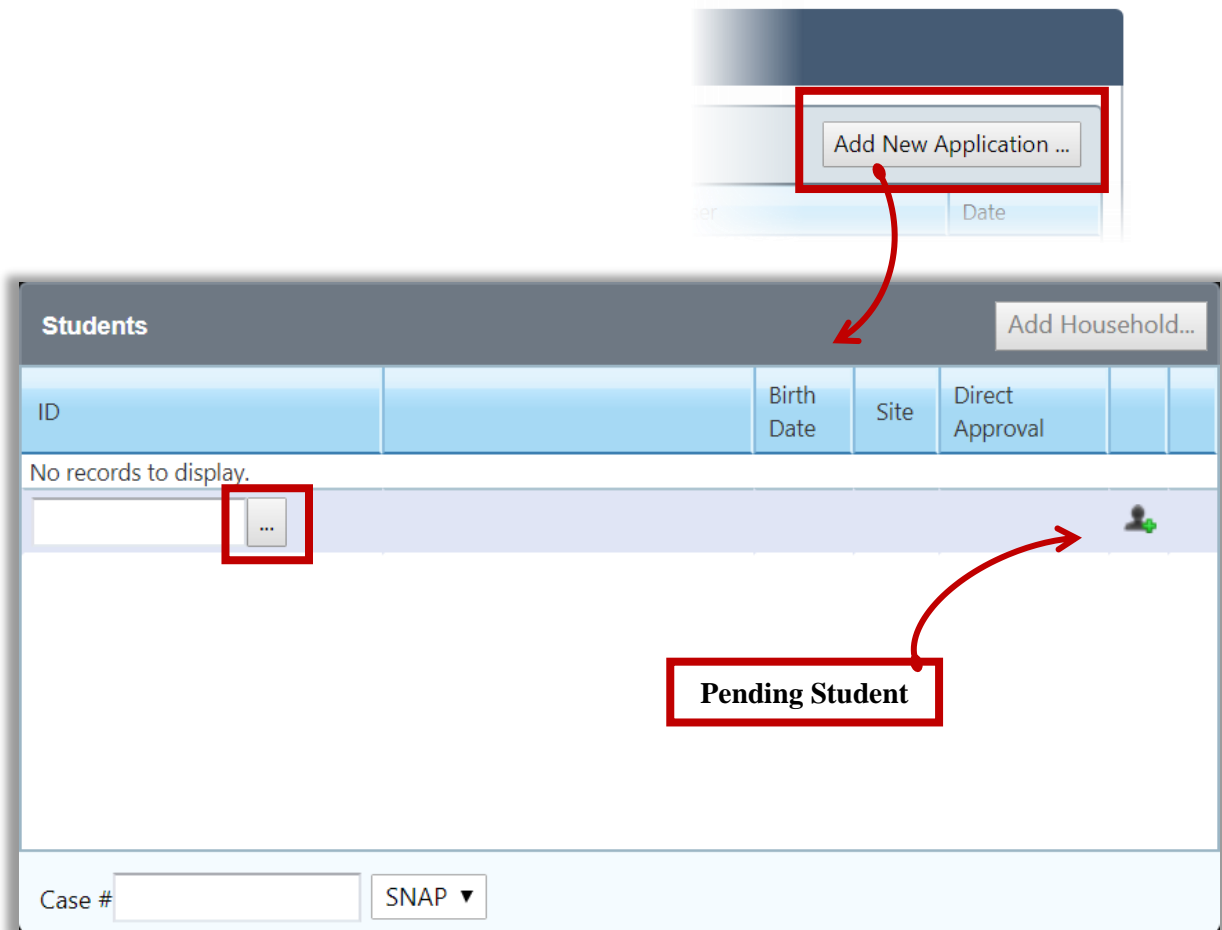
Student not identified



### Add Student to Application

#### To add a student to an application

1. Click **Add New Application** to display the Validate window.
  2. In the Students group, enter the student's assigned ID or click **Lookup**.
    - a. Under **Lookup**, filter for student, select the student, and click **OK**.
- ▲ See page 16 for more information on using Lookup.

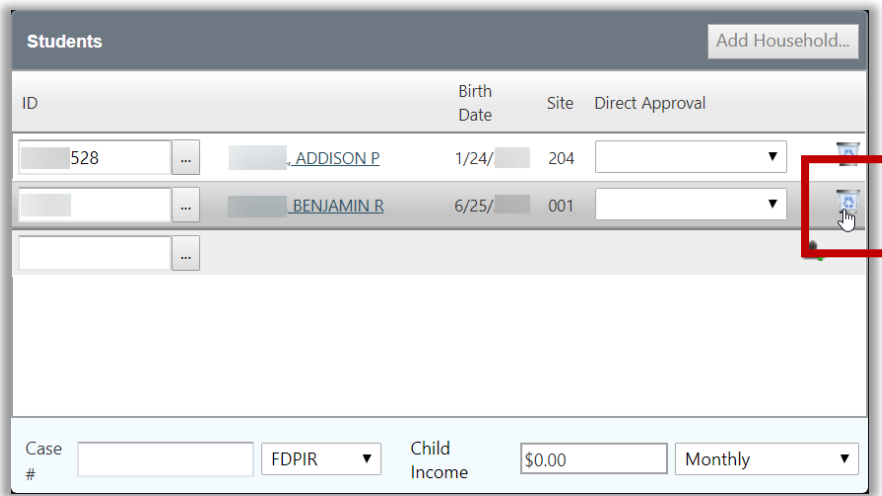


### Remove Students


Students are removed from an application when the wrong Student ID was written on the application, the wrong student was accidentally selected, or when the handwriting on the application was so large that it took up two lines and the system interpreted this to be two students.

**To remove students**

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

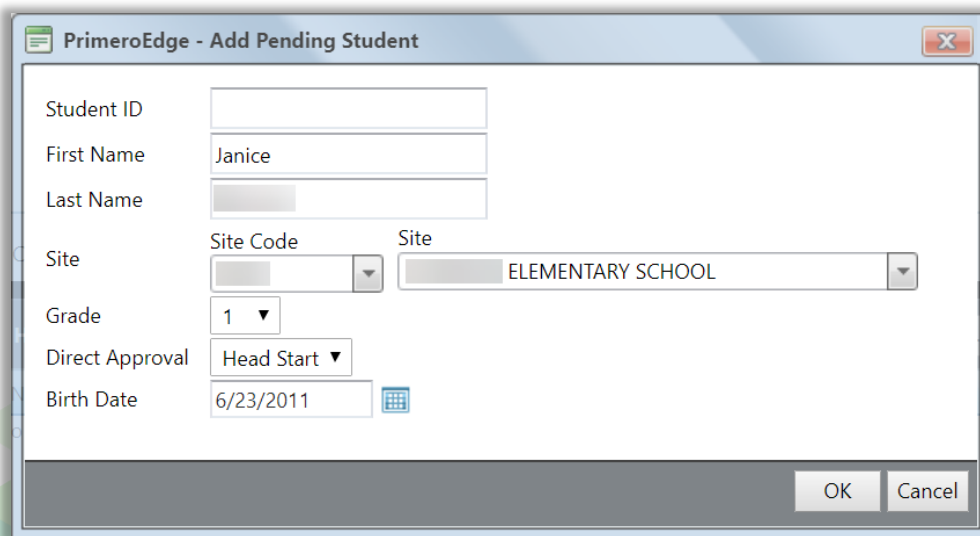


**Add Pending Student**

If the student does not have an assigned ID, click **Add New Pending Student**  in the Validate window.

**To add a pending student**

1. Enter/select as much information about the student as is available.
2. Click **OK**.

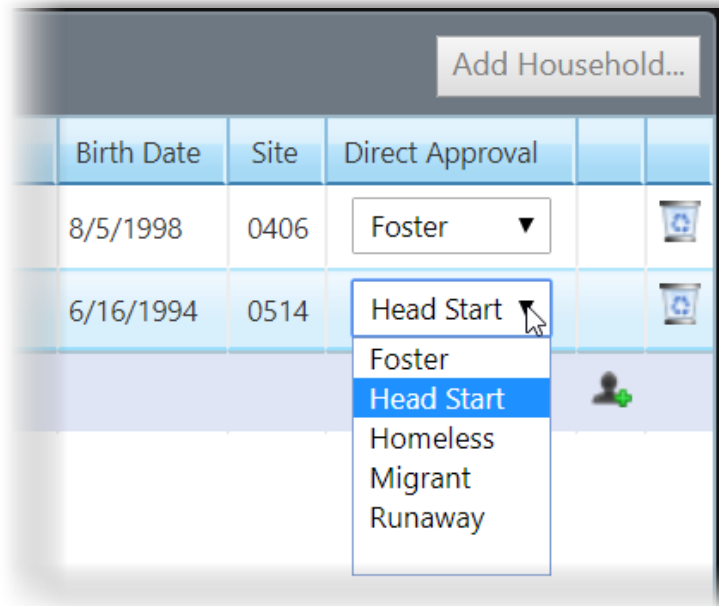


## Add Direct Approval

Direct Approval can be added in the Students group for Foster, Head Start, Homeless, Migrant, and Runaway.

### To add direct approval for a student

- Select a Direct Approval type in a student listing. This example will use Foster, but the instructions apply to all direct approval types.



- Foster children can be included on an application with “non-foster” students.
- A student marked as “Foster” is assigned “Free” eligibility with reason of “Foster”.
- Other students on the application not marked “Foster” are assigned eligibility based on household income.
- If all students on the application are marked “Foster”, then application is a “Foster” application with all students assigned “Free” eligibility with a “Foster” basis.

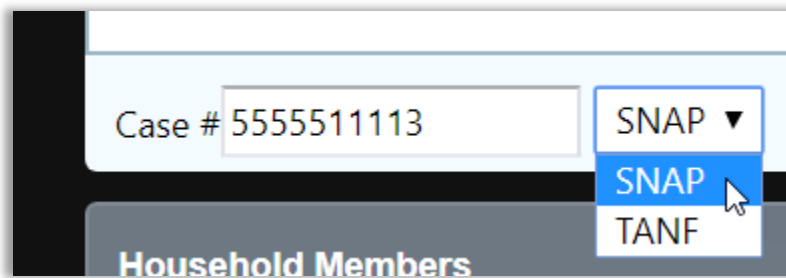
---

### Add SNAP/TANF Benefits

Supplemental Nutrition Assistance Program (SNAP) or Temporary Aid for Needy Families (TANF) benefits can be added to an application.

#### To add SNAP/TANF benefits

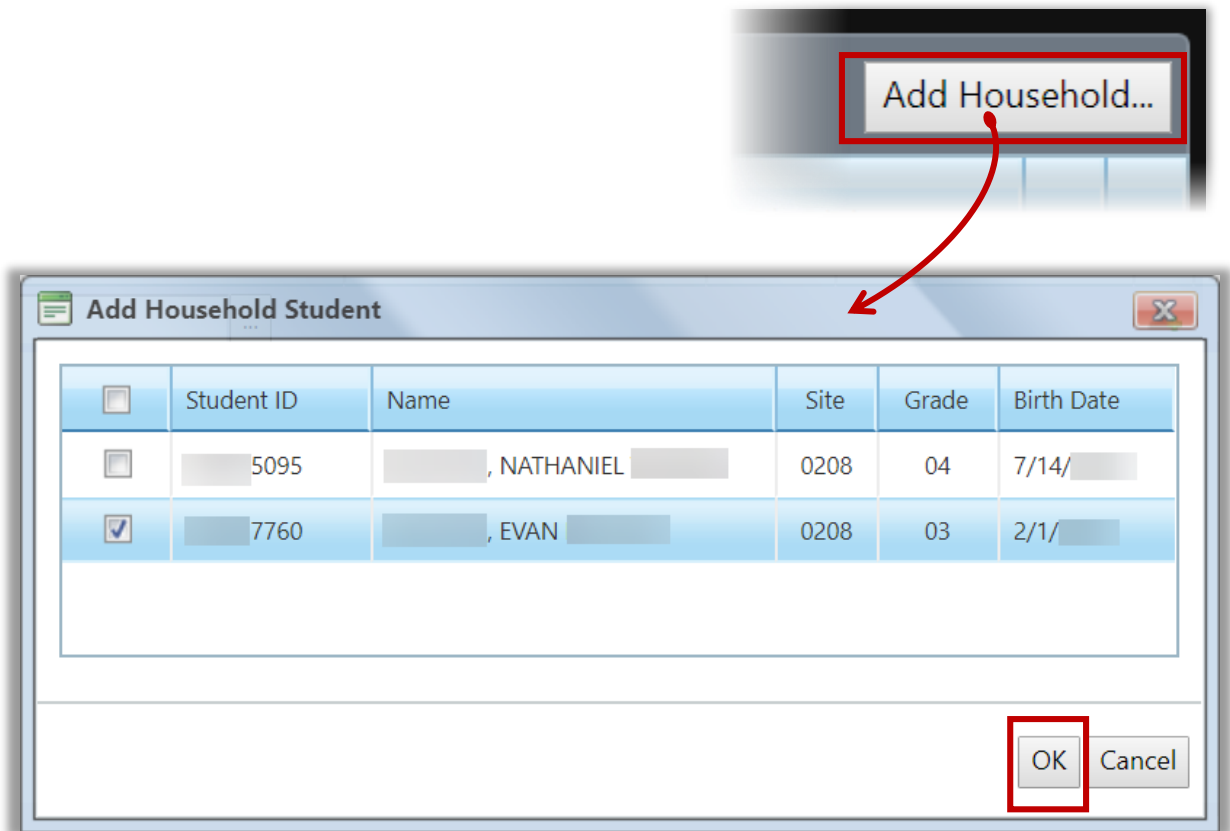
1. Enter the Case # (identification number).
2. In the drop-down under the category listed "Direct Approval", select the benefits type.



## Add Household

### To add other active students in the same household

1. Click **Add Household**.
2. Select the check box next to each household member(s) to add to the application.
3. Click **OK**.



- ▲ The **Add Household** function is first enabled through the “[Validate – Enable Add Household](#)” system setting for the Student Eligibility module. When an **active** student is added to the application, the **Add Household** button becomes available. Clicking the button shows other active students in the same household that can be added to the application.

## Add Guardian Information

“Address in PrimeroEdge” is the address on file for the youngest student listed on the application. Select one address to use on the notification letter.

The “Address on Application” is likely to need correction, verify it matches what is on the application image.

Selecting Address on Application does not update, change or modify the address associated with any student, it only tells PrimeroEdge which address to use for the notification letter.

### To add guardian information

1. Click **Guardian Info**, and enter the guardian name and address.
2. Click **OK**.

Optional Info... **Guardian Info ...** Add Member ...

Income Amount

All names, addresses, phone numbers, etc. in this image are strictly creations of the author's imagination

PrimeroEdge - Guardian Information

Guardian Name  
James Monroe

Address in PrimeroEdge ?

Address:  Apt:   
City:  State:  Zip:   
Home:  Work:   
Email:

Address on Application ?

Address: 123 Schoolville Rd Apt: 1289  
City: Tampa State: FL Zip: 55555  
Home: 555-12121 Work: 555-12122  
Email: JMonroe@gmail.com

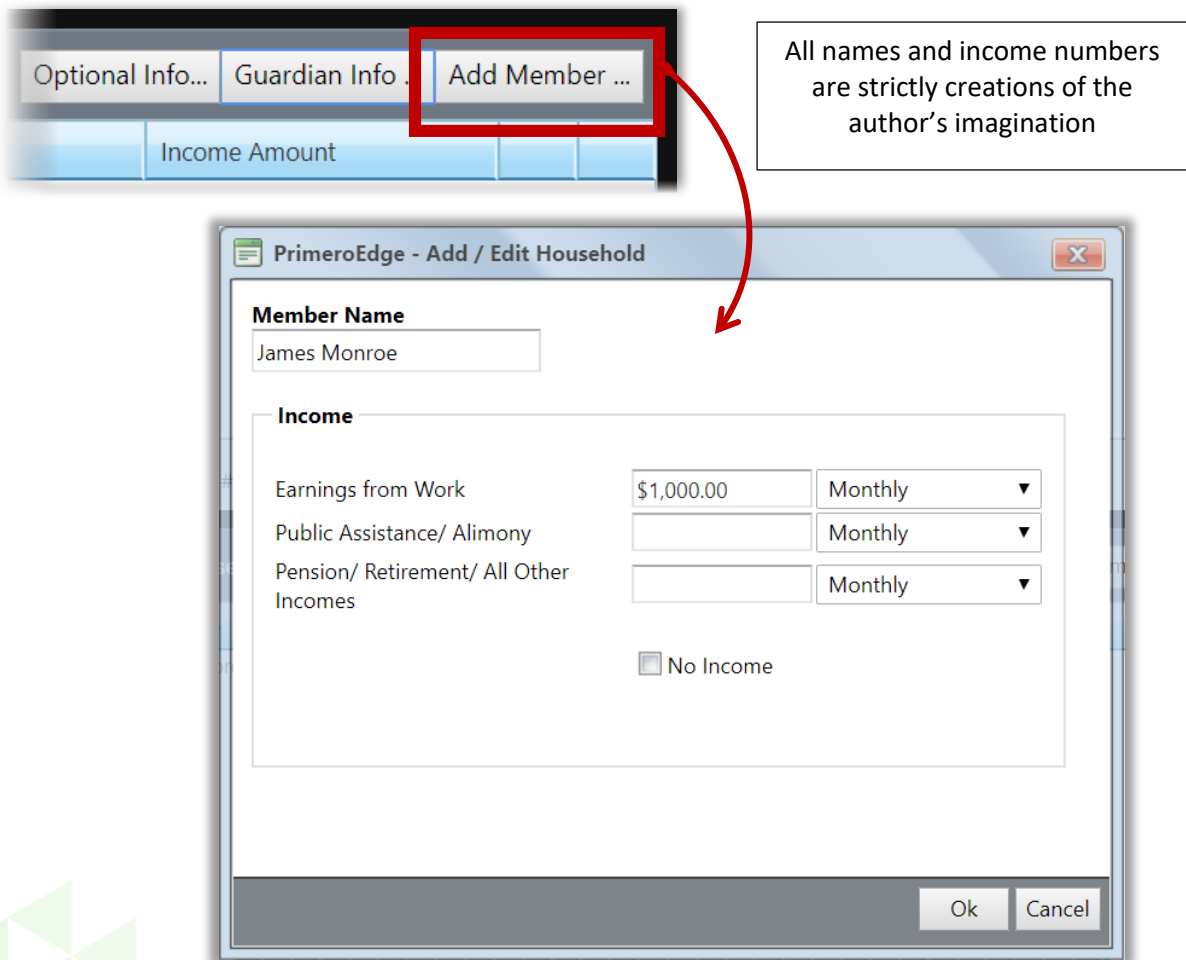
Ok Cancel

### Add Member (Household)

Adding a member in the household collects income information needed for determining eligibility.

#### To add a household member

1. Click **Add Member**.
2. Enter member name.
3. Enter member's income in the appropriate field and select the corresponding pay frequency; select "No Income" if the member receives no income.
4. Click **OK**.



**To change member name or income information**

1. Click **Edit** in a member listing.
2. Make changes as needed.
3. Click **OK**.

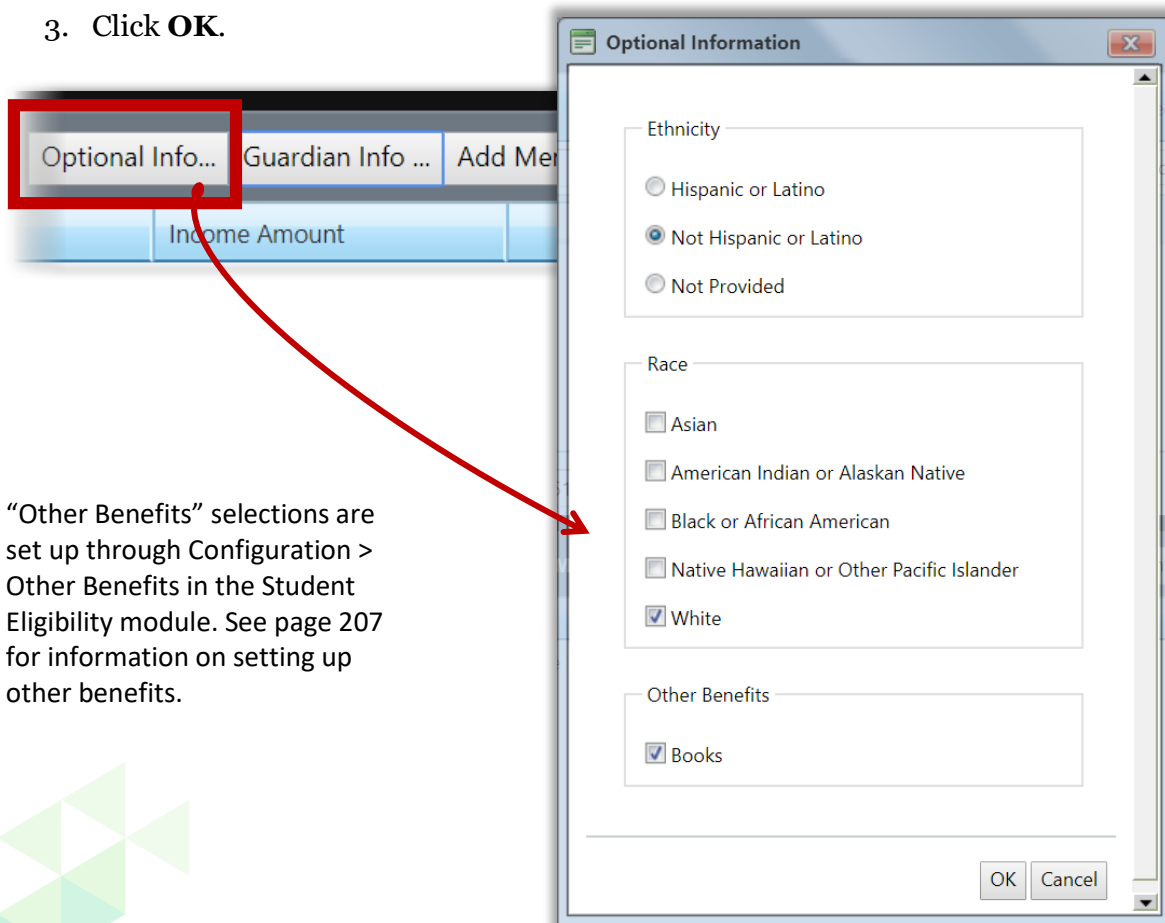
**To remove a member from the household**

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

---

**Select Optional Information****To select optional information for the household**

1. Click **Optional Info...**
2. Select one Ethnicity option, one or more Race options, and one or more Benefits as needed.
3. Click **OK**.





**Add Application Details**

**Add SSN, Signature, Language**

**To add application details**

1. Enter the last four digits of the applicant’s Social Security Number, or select “No SSN” if the SSN was not provided.
2. If the application is signed, select “Signature”.
3. By default, English is selected for Language. Make a different selection, if needed.

PrimerEdge determines the application language based on the barcode included on the application. Notifications and other FRE related documents are printed in the language selected here

Applicant SSN:   No SSN  Signature Language: English ▼

<b>Valid</b>	Eligibility	Basis	Valid Period
	<b>FREE</b>	<b>FOSTER</b>	<b>1/29/2018 - 7/31/2018</b>

When all required information is supplied, the application status changes to “Valid” and eligibility is determined.

## Mark as Pending

Some information may not be available at the time you are processing the application. In this case you will ask to save the application as pending.

### To save the application as pending

1. Click **Pending Application**.
  2. Select a reason for the pending status (required) and enter comments in **Comment** (required) to provide more information about the selected reason.
  3. Click **OK**.
  4. Click **Close**.
- ▲ The pending application appears in the **Applications in Batch #** list with a status of “Partially Validated”.

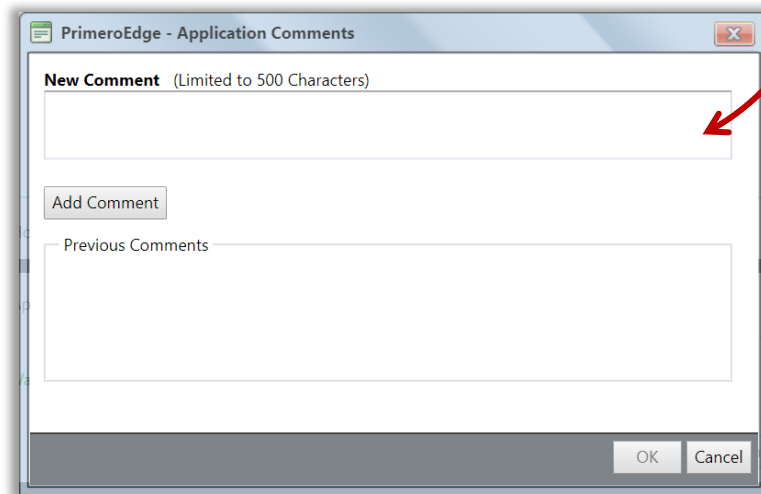
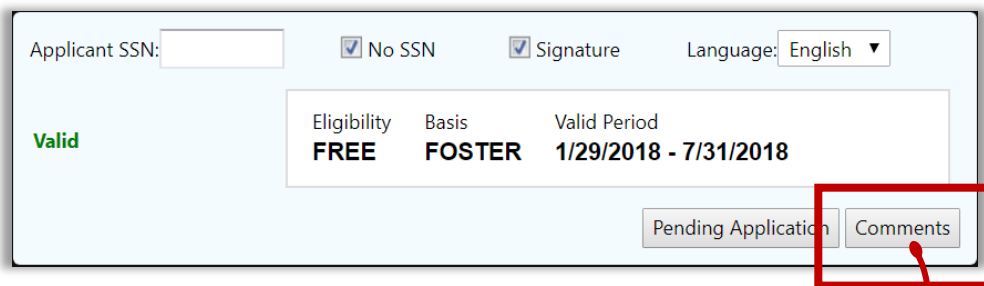
The screenshot shows a web application interface. At the top, there are fields for 'Applicant SSN:', 'No SSN' (checked), 'Signature' (checked), and 'Language: English'. Below this is a table with columns 'Eligibility', 'Basis', and 'Valid Period'. The table contains one row with values 'FREE', 'FOSTER', and '1/29/2018 - 7/31/2018'. A 'Valid' status is shown to the left of the table. Below the table, there are buttons for 'Pending Application' and 'Comments'. The 'Pending Application' button is highlighted with a red box. A red arrow points from this button to the 'Add Pending Application' dialog box. The dialog box has a title bar 'Add Pending Application' and a close button. It contains a 'Select a reason' section with a list of radio buttons: 'Missing PFD information', 'Restored Application', 'Foster Child Application with multiple students listed', 'Incomplete' (selected), 'Incorrect income information', 'Incorrect categorical information', 'Missing household members', 'No Signature', 'SSN information missing/incorrect', 'Possible duplicate information', 'Online Application: Unmatched student', 'Reapplying after verification', and 'Applicant and student with the same name'. Below this is a 'Comment' section with a text area containing 'Guardian will supply missing information by the end of the day.' and 'OK' and 'Cancel' buttons. At the bottom right of the dialog box is a 'Close' button.

### Add Comments

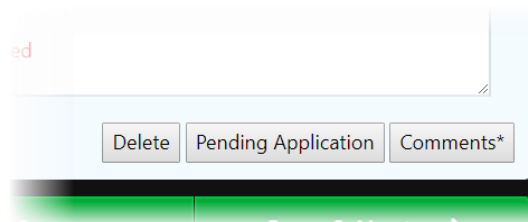
An application may go through the validation process more than one time and general comments can be saved with the application through the **Comments** button.

#### To save comments with the application

1. Click **Comments**.
2. Enter up to 500 characters in **New Comment** and click **Add Comment**.
3. Click **OK**.



When comments have been saved with an application, the **Comments** button displays an “\*”. Click **Comments** to view previously saved comment text.



## Save Application

As application data is processed, the details area displays the application status and provides information on areas that need attention.

Household Size:  Total Income (M) \$150.00

Applicant SSN:   No SSN  Signature Language:

Date Received:

**Correction Required** Invalid household size.

Application #: 1869

When all required information has been supplied, “**Valid**” appears in the details section. Clicking **Save** with a status other than Valid tags the application as “Pending” and a reason must be selected for marking the application as pending (see page 38).

### To save an application

- Click **Save**.

The **Previous** and **Save & Next** buttons are available when processing a batch of applications.

Household Size:  Total Income (M) \$150.00

Applicant SSN:   No SSN  Signature Language:

Date Received:

**Valid**

Eligibility	Basis	Valid Period
<b>FREE</b>	<b>INCOME</b>	1/25/2018 - 6/30/2018

Application #: 1869

### Save with Direct Approval Confirmation

When a Direct approval type is selected for a student, the Direct Approval confirmation popup appears.

**PrimerEdge - Direct Approval Confirmation**

The following students have been indicated as Direct Approval. Please select a confirmation option for each student.

Name	Type	Confirmation
Monroe, Janice	Migrant	<input type="radio"/> Confirmed (DA Status) <input type="radio"/> Not Confirmed (DA Status) <input type="radio"/> Not Confirmed (App Status)

**Comment** Limited to 500 Characters

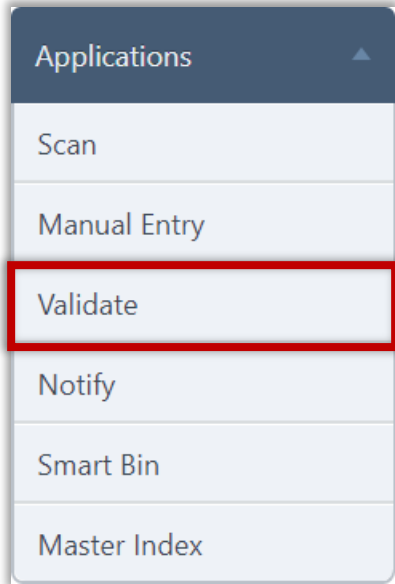
Note: Not Confirmed (DA Status) indicates no official confirmation but process as Direct Approval (DA Status).

OK Cancel

### To complete Direct Approval assignment

1. Select a confirmation option for each student.
2. Enter a comment.
3. Click OK.

Validate



Validation is the process of ensuring that application information is complete so that an eligibility can be assigned. Unlike scanning, Batch Validation can be done from any computer with access to PrimeroEdge.

Applications that only include all CEP-eligible students are sent to the Smart Bin without being processed. Applications that contain at least one CEP-eligible student and one non-CEP-eligible student are handled by processing the non-CEP-eligible student and sending the CEP-eligible student to the Smart Bin without processing.

The Validate page lists batches of applications.

**Validate 2017 - 2018**

Batch #  OR Batch Status   Online Apps Start Date: 07/13/2017  
 Online Apps End Date: 12/31/2018

Application Batches							
Batch #	Total Applications	Received Date	Batch Type	Batch Status	Date Checked Out	Checked Out By	
<a href="#">283</a>	1	10/25/2017	Online	Online	1/9/2018	User <input type="text"/>	<input type="button" value="Check-In"/>
<a href="#">287</a>	1	11/8/2017	Online	Online	1/9/2018	User <input type="text"/>	<input type="button" value="Check-In"/>
<a href="#">299</a>	1	1/24/2018	Import	import	3/8/2018	Cybersoft Support	<input type="button" value="Check-In"/>
<a href="#">300</a>	3	1/24/2018	Import	import	3/28/2018	Justin Miller	<input type="button" value="Check-In"/>
<a href="#">301</a>	26	1/25/2018	Import	import	1/25/2018	Cybersoft Support	<input type="button" value="Check-In"/>
<a href="#">305</a>	1	1/25/2018	Import	import			<input type="button" value="Check-In"/>
<a href="#">305</a>	25	1/25/2018	Import	import			<input type="button" value="Check-In"/>
<a href="#">306</a>	1	1/25/2018	Import	import	3/8/2018	Cybersoft Support	<input type="button" value="Check-In"/>
<a href="#">308</a>	1	1/25/2018	Import	import			<input type="button" value="Check-In"/>
<a href="#">309</a>	25	1/25/2018	Import	import			<input type="button" value="Check-In"/>

Page size:  26 items in 3 pages

**To open an application batch to begin validation**

1. Click a Batch# link.
2. Click an [Application #](#) on the Batch Summary page.

Validate 2017 - 2018

Batch #  OR Batch Status

Online Apps Start Date: 08/01/2017  
Online Apps End Date: 06/30/2018

Application Batches						
Batch #	Total Applications	Received Date	Batch Type	Batch Status	Date Checked Out	Checked Out By
<a href="#">388</a>	3	1/29/2018	Manual	Processed		<input type="button" value="Check-In"/>

For batches that have never started the validation process, the first application in the batch appears in the Validation Workspace.

If you close the Validation Workspace, the Batch Summary page appears.

Batch Summary

[« Back to Batch List](#)

**There are applications in this batch that are not processed.**

Batch Summary

Batch #: **526** Total Free: **0**    
 Total Applications: **4** Total Reduced: **0**  
 Total Processed: **0** Total Paid: **0**

Application Summary							
Application #	Eligibility	Basis	Application Status	User	Date	<input type="checkbox"/> Email	<input type="checkbox"/> Print
<a href="#">5805</a>			Accepted	Cybersoft Support	08/15/2017		
<a href="#">5806</a>			Accepted	Cybersoft Support	08/15/2017		
<a href="#">5807</a>			Accepted	Cybersoft Support	08/15/2017		
<a href="#">5808</a>			Accepted	Cybersoft Support	08/15/2017		

**To start the batch validation process**

1. Click **Start Validating this Batch** to start the validation process with the first application in the batch.
2. Click an [Application #](#) link to start validation with a particular application in the batch.

After validation has started for a batch, the Batch Summary page appears when a batch number is clicked on the Validate page.

**Batch Summary**

[« Back to Batch List](#)

**There are applications in this batch that are not processed.**  
**There are applications in this batch that are not notified.**

Batch Summary

Batch #: <b>388</b>	Total Free: <b>3</b>	<input type="button" value="Application Approval List"/>
Total Applications: <b>4</b>	Total Reduced: <b>0</b>	<input type="button" value="Batch Cover Sheet"/>
Total Processed: <b>3</b>	Total Paid: <b>0</b>	

**Application Summary**

Application #	Eligibility	Basis	Application Status	User	Date	<input type="checkbox"/> Print
<a href="#">5156</a>	Free	Income	Processed	Cybersoft Support	01/29/2018	<input type="checkbox"/>
<a href="#">5157</a>	Free	Income	Processed	Cybersoft Support	01/29/2018	<input type="checkbox"/>
<a href="#">5158</a>			Deleted	Cybersoft Support	01/29/2018	<input type="checkbox"/>
<a href="#">5159</a>	Free	Income	Processed	Cybersoft Support	01/29/2018	<input type="checkbox"/>



### Validate Application

The **Validation Workspace** is divided into four (4) groups:

**Application Image**—move the mouse cursor over the application to magnify hard-to-read or small print.

**Students**—lists all students included on the application; student status is listed for each.

The screenshot displays the 'Validation Workspace' for application # 5781 (1 of 4) in Batch # 520. It is divided into four main sections:

- Application Image:** Shows the 'State of Pennsylvania Meals and/or Special Milk Program Family Application 2015-2016'. It includes sections for 'STEP 1 - All Children in School in the Household', 'STEP 2 - Assistance Programs', 'STEP 3 - All Household Member Income', and 'STEP 4 - Contact Information and Adult Signature'. There are also 'OPTIONAL - Children's Racial and Ethnic Identities' fields.
- Students:** A table listing students with columns for ID, Birth Date, Site, and Direct Approval. One student is listed: ID 7133, Name DALTON J, Birth Date 1/19, Site 401.
- Application Details:** A form for providing contact information, including printed name, signature, date, address, phone numbers, and email.
- Household Members:** A table for listing household members with columns for Name, Income Type, and Income Amount. It shows 'No records to display.' Below the table, it displays 'Household Size: 0' and 'Total Income (Y) \$0.00'. A red error message states: 'Correction Required Not all household members are listed.'

**Application Details**—displays various required information; when all application information has been entered, assigned eligibility appears here.

**Household Members**—lists all members that reside in the household; income amount is listed for each; number shown in Household Size must match the number of listed individuals.

## Students Group

The Students group of the Validation Workspace allows you to confirm or look up students to ensure the system recognized the parent's handwriting and the correct students are listed. In addition, the entire household or selected household members can be added to the application in this group.

Student information is automatically displayed if the SSN/ID listed on the application matches a student in the database.

ID	Name	Birth Date	Site	Direct Approval	
0448	CHELSEA N	10/25/	511		
7133	DALTON J	1/19/	401		⚠
3018	ALEXIS	12/29/	509		
3601					

Case #  SNAP  Child Income  Monthly

Appearance of the caution icon signals that the student is in a special status such as the student already has an approved status for this year or was selected for verification. Hovering over the icon displays the approval status and reason and shows the application number when appropriate.

When an application lists a student with no Social Security Number/Student ID, "NO SSN/ID" is listed in the Name field.

In the Student Status field, hover the mouse cursor over the icon to view an explanation of the icon.



Add new pending student; click to display the Add Pending Student popup.



Pending student; click to display the Add Pending Student popup.



No student in the database matches the provided information; Possible reasons: latest student information import file did not include the student SSN; SSN was written incorrectly; SSN is not kept in PrimeroEdge.



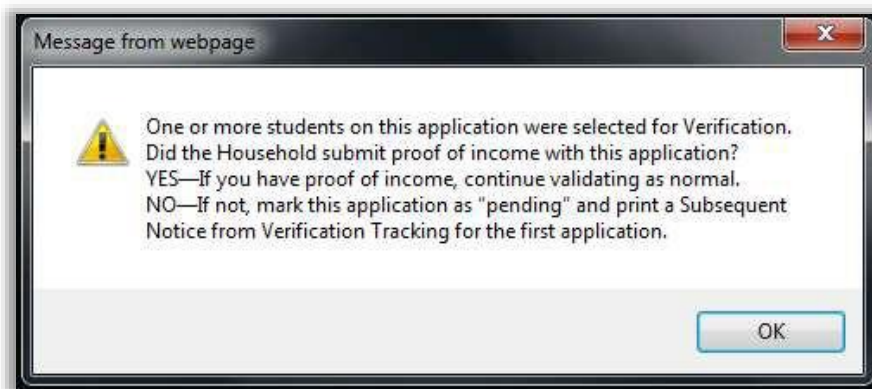
Student already has an approved status for this year; If a student listed on the application is Direct Certified, you are given the option of extending those benefits to all students on the application upon saving. The application is then no longer eligible for Verification.

## Messages

If any of the students on the application are currently on another previously verified application, this message is shown when validating a new application for the first time.

A caution icon is shown for the student in the Students list. Hovering over the icon displays “This student was selected for verification on application ###”.

See Section 7 for more information on how to handle applications of this nature.




### Add Students

Students are combined in a household when they are processed on the same application. If PrimeroEdge recognizes that there are additional students in a household that have not been added to the application a message is displayed along with the **Add Students** button. The entire household can also be added using the Add Household button in the Students section. It is recommended to take the application at face value and only add the students that the parent listed.

In the first year that you process applications with PrimeroEdge, prior household history will not exist, so you will not see the **Add Student** or the **Add Household** buttons.

See page 29 for the steps to add or remove a student on an application through the Validation Workspace.

### Add Pending Student

When Lookup does not find a student, click the  or  icon in the Students group to display the Add Pending Student popup.

Pending Students are placed in the Smart Bin which will be explained in a later section. Continue processing the application as normal.

See page 30 for the steps to add a pending student to an application through the Validation Workspace.

### Add SNAP/TANF Benefits

Supplemental Nutrition Assistance Program (SNAP) or Temporary Aid for Needy Families (TANF) benefits can be added to an application. See page 32 for the steps to add SNAP or TANF.

### Add Direct Approval

Direct Approval can be added in the Students group for Foster, Head Start, Homeless, Migrant, and Runaway. See page 31 for the steps to add Direct Approval type.

### Add Household

A student with an existing household in PrimeroEdge must exist on the application for the **Add Household** button to be available. See page 33 for the steps to add a household to an application through the Validation Workspace.

---

## Household Members Group

The **Household Members** group includes all members listed in the household and member income.

### Add Household Members

If one Member receives income monthly and another receives income weekly, PrimeroEdge converts incomes that are of mixed frequency to a yearly total which is displayed in **Total Income**.

If all income is received with the same frequency, no conversion is necessary. The total income and corresponding frequency are shown in **Total Income**.

The dollar amount in **Total Income** is compared against the appropriate Income Eligibility Guidelines.

See page 35 for the steps to add a Household member.

### Update Household Size

Household size is the total number of people listed in the Household Members group. After completing the Household Members validation, verify Household Size.

If Household Size does not match the number of people listed in the household section of the application, an error is displayed in the **Application Details** group of the Validation Workspace. You may need to add or remove household members.

### Add Optional Info...

See page 36 for the steps to select optional information. See page 207 for the steps to set up other benefits.

### Add Guardian Information

Guardian information includes a guardian name and address, including email address. See page 34 for the steps to add guardian information to an application through the Validation Workspace.

## Application Details Group

The Application Details group of the Validation Workspace allows the user to edit the Applicant SSN, indicate a Signature was/was not provided, and select a Language. The application validity and status determination are displayed in this area.

See page 37 for the steps to complete this information in the Details group.

### Add for Verification

A previously processed application can be added to the verification sample.

Applicant SSN: <input type="text" value="1234"/>	<input type="checkbox"/> No SSN	<input checked="" type="checkbox"/> Signature	Language: <input type="text" value="English"/>						
<b>Valid</b>	<table border="1"> <thead> <tr> <th>Eligibility</th> <th>Basis</th> <th>Valid Period</th> </tr> </thead> <tbody> <tr> <td><b>FREE</b></td> <td><b>INCOME</b></td> <td><b>1/29/2018 - 7/31/2018</b></td> </tr> </tbody> </table>			Eligibility	Basis	Valid Period	<b>FREE</b>	<b>INCOME</b>	<b>1/29/2018 - 7/31/2018</b>
Eligibility	Basis	Valid Period							
<b>FREE</b>	<b>INCOME</b>	<b>1/29/2018 - 7/31/2018</b>							
<b>Application #: 5156</b>	<input type="button" value="Add for Verification"/>	<input type="button" value="Delete"/>	<input type="button" value="Pending Application"/> <input type="button" value="Comments"/>						

### To add for verification

- Click **Add for Verification**.

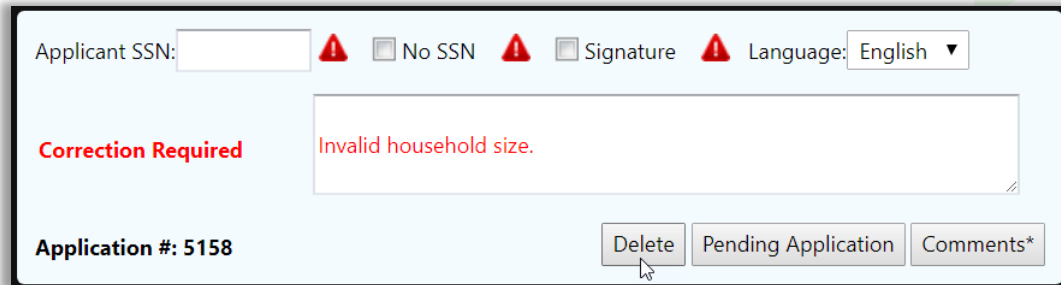
Applicant SSN: <input type="text"/>	<input checked="" type="checkbox"/> No SSN	<input checked="" type="checkbox"/> Signature	Language: <input type="text" value="English"/>						
<b>Valid</b>	<table border="1"> <thead> <tr> <th>Eligibility</th> <th>Basis</th> <th>Valid Period</th> </tr> </thead> <tbody> <tr> <td><b>FREE</b></td> <td><b>INCOME</b></td> <td><b>1/29/2018 - 7/31/2018</b></td> </tr> </tbody> </table>			Eligibility	Basis	Valid Period	<b>FREE</b>	<b>INCOME</b>	<b>1/29/2018 - 7/31/2018</b>
Eligibility	Basis	Valid Period							
<b>FREE</b>	<b>INCOME</b>	<b>1/29/2018 - 7/31/2018</b>							
<b>Application #: 5159</b>	<input type="button" value="Add for Verification"/>	<input type="button" value="Delete"/>	<input type="button" value="Pending Application"/> <input type="button" value="Comments"/>						

- ▲ The **Add for Verification** button is no longer available.

## Delete Application

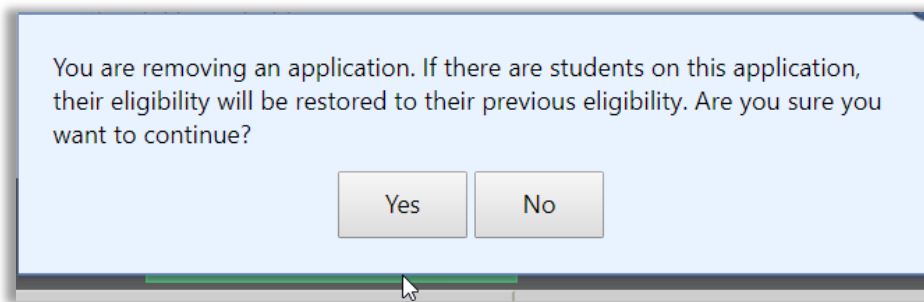
### To delete an application

1. Click **Delete**.



The screenshot shows a validation workspace for application # 5158. At the top, there are fields for 'Applicant SSN', 'No SSN', 'Signature', and 'Language' (set to English). A red warning message 'Correction Required' is displayed, stating 'Invalid household size.' Below the message, there are three buttons: 'Delete', 'Pending Application', and 'Comments\*'. A mouse cursor is hovering over the 'Delete' button.

A warning message is displayed indicating the results of deleting an application.



The dialog box contains the following text: 'You are removing an application. If there are students on this application, their eligibility will be restored to their previous eligibility. Are you sure you want to continue?' Below the text are two buttons: 'Yes' and 'No'. A mouse cursor is hovering over the 'Yes' button.

2. Click **Yes** to continue (or click **No** to return to the Validation Workspace).

3. Select the reason for deleting the application.
4. Enter Comments.
5. Click **OK** to complete deletion of the application.

**Delete Application**

**Select a reason**

Other (please specify in comments)

Students are Direct Approvals

Students approved on previous application

Duplicate application

**Comment** Limited to 500 Characters

Mother complete online application earlier.

OK Cancel

Close

(Click **Cancel** to close the Delete Application popup and return to the Validation Workspace—application is not deleted).

6. Click **Close**.

After an application is deleted, it can only be accessed via the Smart Bin which is discussed on page 58.

### Add Pending Status

Some information may not be available at the time you are processing the application. In this case you will ask to save the application as pending. See page 38 for the steps to save an application as pending.

### Add Comments

Comments can be added to an application as often as needed. See page 39 for the steps to add comments to an application.



**View a Batch Summary**

The **Batch Summary** page appears when you save the last application in the batch. All relevant information pertaining to this batch is displayed here.

Notification can be completed from this page (recommended after each batch is completed) via print or email.

Validating initiates a “check out” for that batch and prevents other users from accessing the batch until validation is complete or the batch is checked in.

The screenshot shows the 'Batch Summary' interface. At the top, there are navigation links: '< Back to Batch List' and '< Check-In Batch'. Below these are two warning messages in orange text: 'There are applications in this batch that are not processed.' and 'There are applications in this batch that are not notified.' The main summary area displays statistics for Batch #: 388, including Total Applications: 4, Total Processed: 3, Total Free: 3, Total Reduced: 0, and Total Paid: 0. There are buttons for 'Application Approval List' and 'Batch Cover Sheet'. Below this is an 'Application Summary' table with columns for Application #, Eligibility, Basis, Application Status, User, Date, and a Print checkbox.

Application #	Eligibility	Basis	Application Status	User	Date	<input type="checkbox"/> Print
<a href="#">5156</a>	Free	Income	Processed	Cybersoft Support	01/29/2018	<input checked="" type="checkbox"/>
<a href="#">5157</a>	Free	Income	Processed	Cybersoft Support	01/29/2018	<input type="checkbox"/>
5158			Deleted	Cybersoft Support	01/29/2018	<input type="checkbox"/>
<a href="#">5159</a>	Free	Income	Processed	Cybersoft Support	01/29/2018	<input type="checkbox"/>

A user with proper permissions can check in a batch that is currently checked out by another user. This is helpful if someone leaves without completing the batch or checking it in.

**To Check In a Batch**

1. Display the Batch Summary page for a batch.
2. Click **Check In Batch** to allow others access before validation is complete.

## Application Status

Two reports are available on the **Batch Summary** page that provide information about applications:

1. Click **Application Approval List** to display a report of the applications that have been processed for the current date. This report is described on page 127.
2. Click **Batch Cover Sheet** to display a summary of applications scanned in this batch. This report is described on page 134.

## Batch Notification

**Recommendation:** Print or email notification letters from the Batch Summary page as each batch is completed.

- To generate notification letters to be mailed to guardians,
    1. Select **Print** in one or more application listings.
    2. Click **Notify**.
  - To email notification letters to guardians
    1. Select **Email** in one or more application listings.
    2. Click **Notify**.
- ▲ The **Email** check box is available when
- \* Email settings are established in PrimeroEdge
  - \* Applications have an email address recorded on the **Demographics** tab on **Patrons > Students**. A separate email is sent to each address in the student's record.

**Batch Summary**

[← Back to Batch List](#)

[← Check-In Batch](#)

There are applications in this batch that are not notified.

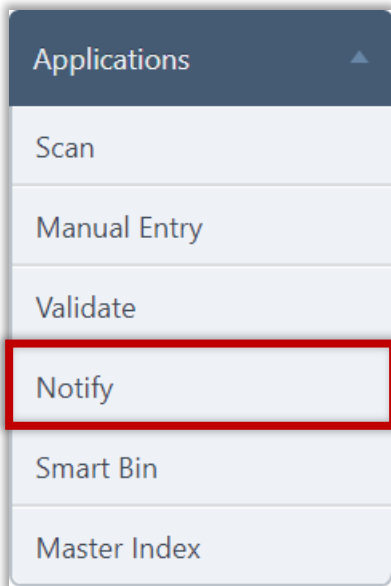
Batch Summary

Batch #: 729      Total Free: 4  
 Total Applications: 4      Total Reduced: 0  
 Total Processed: 4      Total Paid: 0

[Application Approval List](#) | [Batch Cover Sheet](#)

Application #	Eligibility	Basis	Application Status	User	Date	<input type="checkbox"/> Email	<input type="checkbox"/> Print
1918	Free	Income	Processed	Cybersoft Support	10/20/2017	<input type="checkbox"/>	<input type="checkbox"/>
1919	Free	Income	Processed	Cybersoft Support	10/20/2017	<input type="checkbox"/>	<input type="checkbox"/>
1920	Free	Income	Processed	Cybersoft Support	10/20/2017	<input type="checkbox"/>	<input type="checkbox"/>
1921	Free	Income	Processed	Cybersoft Support	10/20/2017	<input type="checkbox"/>	<input type="checkbox"/>

Notify



**Notify** prints and emails notification letters for applications after they have been processed. Letters are generated for one or more batches, individual recipients, or a combination of the two, if needed.

- **Printed Letters:** Printed notification letters are addressed to the parents of the youngest student included on the application. The mailing address used is the PrimeroEdge database address for that student, unless “Application Address” was selected on the Guardian Info tab.
- **Emailed Letters:** Emailed notification letters are addressed to the parents of the youngest student included on the application. The email address used is the email address recorded on the Demographics tab on Patrons > Students. A separate email is sent to each address in the student’s record.

All students processed on the application are listed in the grid on the letter. See Letter Templates on page 221.

- ▲ Students enrolled in sites participating in CEP are excluded from application notification letters. Applications containing CEP-eligible students are sent to the Smart Bin and are not processed.

A screenshot of the 'Notify' interface. At the top, there is a 'Batch Status' dropdown menu set to 'Processed'. Below it are 'Site Code' and 'Site' dropdown menus, both set to '-- ALL --', and an 'Apply' button. The main part of the interface is a table titled 'Batch to Notify' with the following data:

Batch #	Total Applications	Received Date	Checked Out By	Date Checked Out	Batch Type	Email	Print
60	1	7/12/2018			Online	<input type="checkbox"/>	<input type="checkbox"/>
61	3	7/19/2018	Keisha Larkin	7/19/2018	Manual	<input type="checkbox"/>	<input type="checkbox"/>
62	2	7/20/2018			Online	<input type="checkbox"/>	<input type="checkbox"/>
63	1	7/20/2018			Manual	<input type="checkbox"/>	<input type="checkbox"/>
64	4	7/30/2018			Manual	<input checked="" type="checkbox"/>	<input type="checkbox"/>
65	1	8/7/2018			Manual	<input type="checkbox"/>	<input type="checkbox"/>

## Notify Batch Applications

### To notify all applications in a batch

1. Select Email, Print, or both in the column headers.
  - ▲ If the Email check box in the column header is selected but the Print check box in the column header is not selected, all applications with email addresses will be notified by email and the rest are printed.
2. Click **Notify**.
3. Select Print Order by option and, if applicable, a Missing Email option.
4. Click **Notify**.
5. For Printed notification: Select the printer and any necessary settings in the printer dialog, and click **OK**.

The screenshot shows the 'Notify' application window. At the top, there is a 'Batch Status' dropdown set to 'Processed'. Below that are 'Site Code' and 'Site' dropdowns, both set to '-- ALL --', with an 'Apply' button. The main area is a table titled 'Batch to Notify' with columns: Batch #, Total Applications, Received Date, Checked Out By, Date Checked Out, Batch Type, and Print. A 'Notify' button is located to the right of the table header. The table contains one row for batch #388 with 6 total applications, received on 1/29/2018, and a 'Manual' batch type. The 'Print' checkbox is checked. A dialog box titled 'Missing Email' is overlaid on the table. It asks: 'One or more applications do not contain an email address. Would you like to print the notifications for selected applications without email addresses?'. There are two radio buttons: 'Yes' (selected) and 'No'. Below this is the 'Print Order by' section with two radio buttons: 'Site' (selected) and 'Application'. At the bottom of the dialog are 'Notify' and 'Cancel' buttons.

Batch #	Total Applications	Received Date	Checked Out By	Date Checked Out	Batch Type	Print
388	6	1/29/2018			Manual	<input checked="" type="checkbox"/>

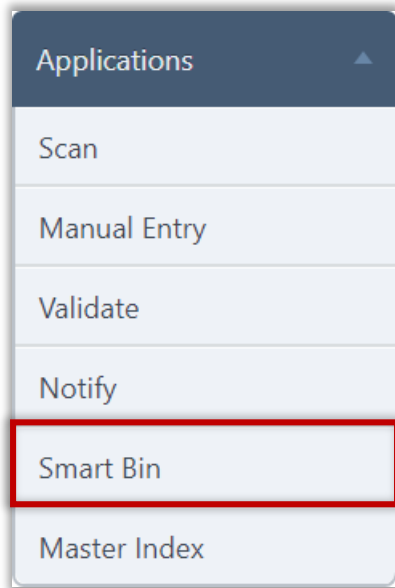
### Notify Selected Applications

#### To notify selected applications

1. Click the **Batch #** link in the **Batch #** column.
2. Click either **Email** or **Print** or both in one or more application listings.
3. Click **Notify**.
4. *For Printing:* Select Print Order by option and click **Notify**.
5. *For Printing:* Select the printer and other necessary settings and click **OK**.

The screenshot shows the 'Notify' application window. At the top, there is a 'Batch Status' dropdown set to 'Processed'. Below it are 'Site Code' and 'Site' dropdowns, both set to '-- ALL --', with an 'Apply' button. The main area contains a table titled 'Batch to Notify' with a 'Notify' button in the top right corner. The table has columns for Batch #, Total Applications, Received Date, Checked Out By, Date Checked Out, Batch Type, Email, and Print. Two rows are visible: Batch # 516 (Manual) and Batch # 528 (Scanned). Below this is a sub-window titled 'Applications in Batch #528' with a 'Close Application List' and 'Notify' button. This sub-window contains a table with columns for Application #, Eligibility, Basis, Status, Email, and Print. Three rows are visible: 5813 (Free, Income, Processed), 5814 (Free, Categorical, Processed), and 5815 (Free, Income, Processed). A 'Print Order by' dialog box is overlaid on top, with radio buttons for 'Site' (selected) and 'Application'. It has 'Notify' and 'Cancel' buttons at the bottom right.

Smart Bin



**Smart Bin** collects students and applications that were not completely identified/processed. The Smart Bin offers:

Applications sent to the Smart Bin include:

- Applications marked as “Pending” during the validation process.
- Applications that include pending students.
- Deleted applications.
- Applications that include students enrolled at sites participating in the Community Eligibility Provision (CEP).

The screenshot shows the 'Smart Bin Pending Students' interface. At the top, there are radio buttons for 'Pending Students' (selected), 'Pending Applications', 'Deleted Applications', 'CEP Pending Students', and 'CEP Pending Applications'. Below this is a sub-section for 'Smart Bin Pending Students' with radio buttons for 'All' (selected), 'Potential Matches', and 'Matched'. There are buttons for 'Process All Matches' and 'Find Matches', and a 'Refresh' button. The main part of the interface is a table with the following columns: Student ID, Last Name, First Name, Site Code, Grade, Birth Date, Application, Application Status, Matched, and Look Up. The table contains five rows of data:

Student ID	Last Name	First Name	Site Code	Grade	Birth Date	Application	Application Status	Matched	Look Up
[Redacted]	[Redacted]	Jon	[Redacted]	4	6/27/2006	1409	Partially Validated	✓	[Redacted]
[Redacted]	[Redacted]	Peter	[Redacted]	PK	12/21/2011	1406	Partially Validated	✓	[Redacted]
[Redacted]	[Redacted]	Brenda	[Redacted]	4	5/15/2005	1470	Partially Validated		[Redacted]
[Redacted]	[Redacted]	Jeanie	[Redacted]	6	3/13/2001	1470	Partially Validated		[Redacted]
[Redacted]	[Redacted]	William	[Redacted]	11	6/23/1995	1412	Processed	✓	[Redacted]

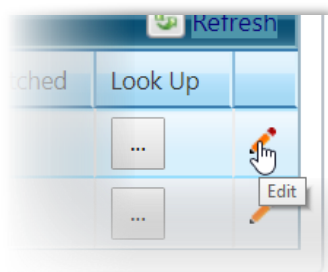
Page Functions Guide

Option / Button	Description
Pending Students	<p>Displays all students that were not in the database at the time the application was being validated. Applications with pending students can be processed from the Smart Bin when the students are included in the PrimeroEdge database.</p> <p><b>Process All Matches</b>—Updates the application and assigns eligibility determination to matched students.</p> <p><b>Find Matches</b>—Displays students whose information matches validation criteria.</p>
Pending Applications	<p>Displays all applications marked as Pending during validation. When additional information is received, the validation process can be completed through the Smart Bin.</p>
Deleted Applications	<p>Displays all applications that were deleted through the Validation Workspace. Deleted applications can be viewed and restored using this option</p>

Process Pending Students

To process pending students

1. Select Pending Students.
2. Use one or both of the following functions to find a match.
  - a. Click **Edit**, make changes as needed, and click **Update** to save changes.



Smart Bin Pending Students  All  Potential Matches  Matched Process All Matches Find Matches Refresh

Student ID	Last Name	First Name	Site Code	Grade	Birth Date	Application	Application Status	Matched	Look Up
		Nicholas	0230	3	7/18/	5162	Partially Validated		...

Student ID:   
 Last Name:   
 First Name: Nicholas  
 Grade:  Site Code:  Site:  Grade:   
 Birth Date: 7/18/2009   
[Update](#) [Cancel](#)

		Janice	0410	7	1/16/2009	5156	Processed		...
--	--	--------	------	---	-----------	------	-----------	--	-----

b. Click **Lookup** in a student listing to search for a match. See page 16 for steps to use Lookup.

Smart Bin Pending Students  All  Potential Matches  Matched Process All Matches Find Matches Refresh

Student ID	Last Name	First Name	Site Code	Grade	Birth Date	Application	Application Status	Matched	Look Up
		Nicholas	0230	3	7/18/	5162	Partially Validated	⚠	...
		Janice	0410	7	1/16/	5156	Processed		...

● When student information appears to match a student in PrimeroEdge, the Caution icon appears in Matched.

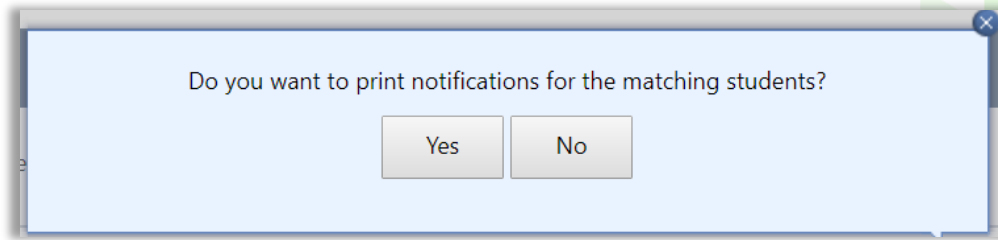
Smart Bin Pending Students  All  Potential Matches  Matched Process All Matches Find Matches Refresh

Student ID	Last Name	First Name	Site Code	Grade	Birth Date	Application	Application Status	Matched	Look Up
6488		NICHOLAS	0230	3	7/18/	5162	Partially Validated	✓	...
		Janice	0410	7	1/16/	5156	Processed		...

A green check mark appears in Matched when the information provided at the time of validation is confirmed or the edit process described above matches a student in the PrimeroEdge database.



3. Click **Process All Matches** to update the application with the matching information and assign the eligibility determination to this student.



4. Click **Yes** to print the letter(s) now, or click **No** to print the letter(s) later through the Notify function.

---

### Process Pending Applications

Select “Pending Applications” to list all applications identified as pending. Comments displays the reason selected during validation to set the application to pending.

#### To view application information

1. Click **Expand** in an application listing to show options for working with the pending application.

Application #	Reason	Date Added	User	Comments
5162	Incomplete	1/30/2018 3:58:00 PM	Cybersoft Support	Does not have ID; pr...
5163	Incomplete	1/30/2018 5:11:00 PM	Cybersoft Support	Needs Student ID
5164	Incorrect income information	1/30/2018 5:15:00 PM	Cybersoft Support	mother will provide ...

2. Do one or more of the following as needed
  - Click **View** to display the application in the View Application window.

Application #: 5162 (1 of 3)
Batch #: 389

Application Info
Optional Info
Guardian Info
History
Refuse Benefits
Image/Documents

Application #	Entry Method	Date Received	Language	<input type="button" value="Add For Verification"/>
5162	Manual	1/30/2018	English	

---

Household Size	Total Income ()	Application SSN	<input type="checkbox"/> No SSN	<input checked="" type="checkbox"/> Application is signed
2	\$0.00	5736		

**Students**

Student ID	Name	Site	Grade	Direct Approval	Birth Date
	Nicholas		3	No	7/18/2009

**Household Members**

Name	Work	Assistance	Other	No Income
Harry	--	--	--	<input checked="" type="checkbox"/>
Mark	--	--	\$1,200.00(M)	<input type="checkbox"/>

All fields in the Application window are read-only. Click through the tabs to view information stored on the application.

- Click **Validate** to open the application in the Validation Workspace. See pages 45–52 for information on the validation process.

**To validate the application**

- Click **Validate** to open the application in the Validation Workspace to complete the validation process. See pages 45–52 for information on the validation process.

The screenshot displays a web application interface for student validation. It is divided into two main sections: 'Students' and 'Household Members'.

**Students Section:**

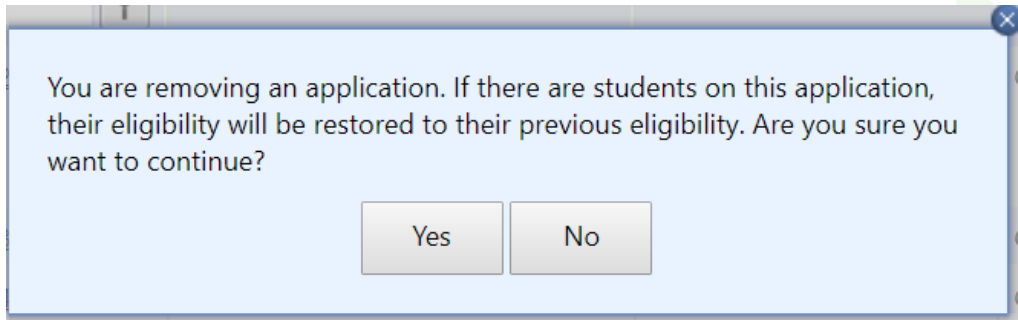
- Header: 'Students' with an 'Add Household...' button.
- Table with columns: ID, Birth Date, Site, Direct Approval.
- Row 1: ID field (with a dropdown arrow), 'NICHOLAS', Birth Date '7/18/' (with a dropdown arrow), Site (empty), Direct Approval (dropdown arrow). Includes a person icon and a trash icon.
- Row 2: ID field (with a dropdown arrow), empty name, Birth Date (empty), Site (empty), Direct Approval (empty). Includes a person icon.
- Below the table: 'Case #' field (with a dropdown arrow) and 'SNAP' dropdown menu.

**Household Members Section:**

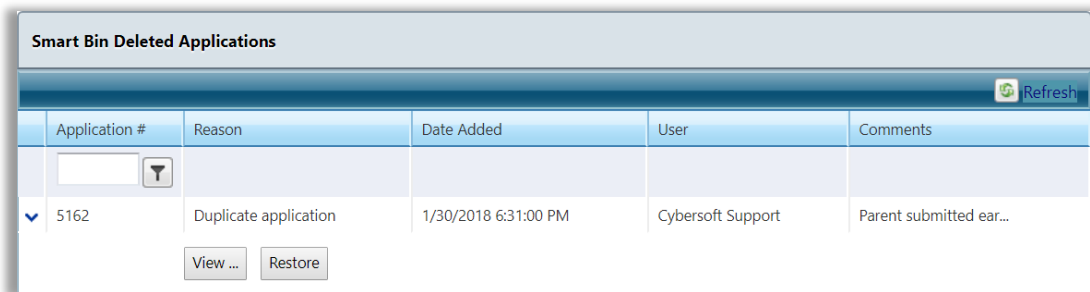
- Header: 'Household Members' with buttons for 'Optional Info...', 'Guardian Info ...', and 'Add Member ...'.
- Table with columns: Name, Income Type, Income Amount.
- Row 1: Name 'Harry', Income Type (empty), Income Amount (empty). Includes edit and trash icons.
- Row 2: Name 'Mark', Income Type 'Other', Income Amount '\$1,200.00(M)'. Includes edit and trash icons.

**To delete the application**

1. Click **Delete**.



2. Click **Yes** in the popup to complete the removal.



The deleted application now appears in the Deleted Applications list.

### Process Deleted Applications

Select “Deleted Applications” to list all applications removed through the Validation Workspace.

#### To view a deleted application

1. Click **Expand** in an application listing to show options for working with the deleted application.
2. Click **View** to display the application in the View Application window.

**Application #: 5158 (3 of 6)** **Batch #: 388**

Buttons:

Tabs: Application Info | Optional Info | Guardian Info | History | Refuse Benefits | Image/Documents

Application # 5158 | Entry Method Manual | Date Received 1/29/2018 | Language English |

Household Size 0 | Total Income (\$) \$0.00 | Application SSN |  No SSN |  Application is signed

**Students**

Student ID	Name	Site	Grade	Direct Approval	Birth Date
956	CHELSEA J	0514	12	No	1/1/
886	LINDY H	0260	01	No	7/31/

**Household Members**

Name	Work	Assistance	Other	No Income
CHELSEA J	--	--	--	<input checked="" type="checkbox"/>
LINDY H	--	--	--	<input checked="" type="checkbox"/>

All fields in the Application window are read-only. Click through the tabs to view information stored on the application.

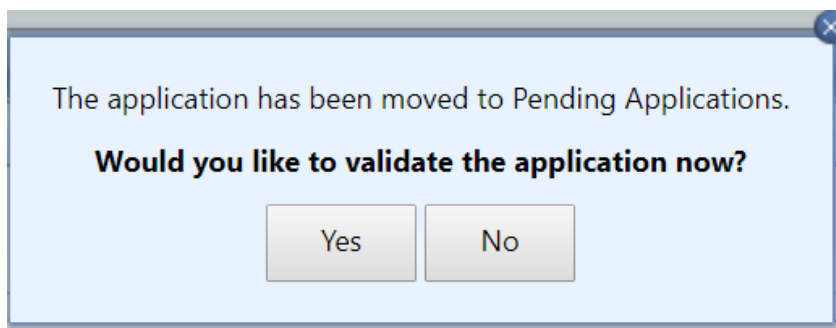
Click **Restore** to remove the deleted status. The **Validate** button becomes available to open the application in the Validation Workspace. See pages 45–52 for information on the validation process.

### To restore a deleted application

1. Click **Expand** in an application listing to show options for working with the deleted application.

Smart Bin Deleted Applications					
Refresh					
Application #	Reason	Date Added	User	Comments	
5158	Duplicate application	1/30/2018 6:20:00 PM	Cybersoft Support	Parent completed onl...	
View ... Restore					

2. Click **Restore**.

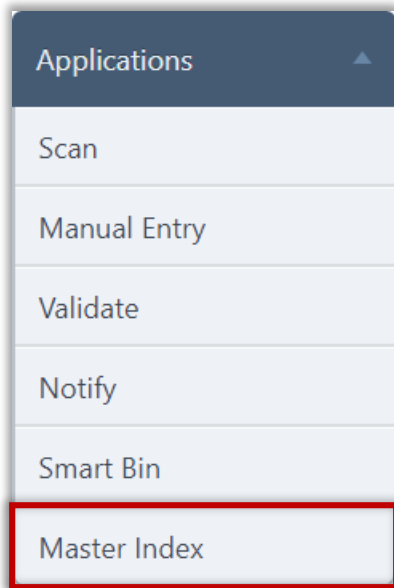


3. Click **Yes** to open the application in the Validation Workspace pop-up, or click **No** to close the popup. The application is removed from the Deleted Application list and added to the Pending Application list.

Smart Bin Pending Applications					
Refresh					
Application #	Reason	Date Added	User	Comments	
5158	Restored Application	1/30/2018 6:22:00 PM	Cybersoft Support	Deleted App Restored	
View ... Validate ... Delete					
5162	Incomplete	1/30/2018 3:58:00 PM	Cybersoft Support	Does not have ID; pr...	
5163	Incomplete	1/30/2018 5:11:00 PM	Cybersoft Support	Needs Student ID	
5164	Incorrect income information	1/30/2018 5:15:00 PM	Cybersoft Support	mother will provide ...	

The restored application appears in the Pending Applications list. The Reason column reflects “Restored Application” and Comments displays “Deleted App Restored”.

## Master Index



**Master Index** holds all processed applications. This electronic filing cabinet can be searched by:

- Application
- Student

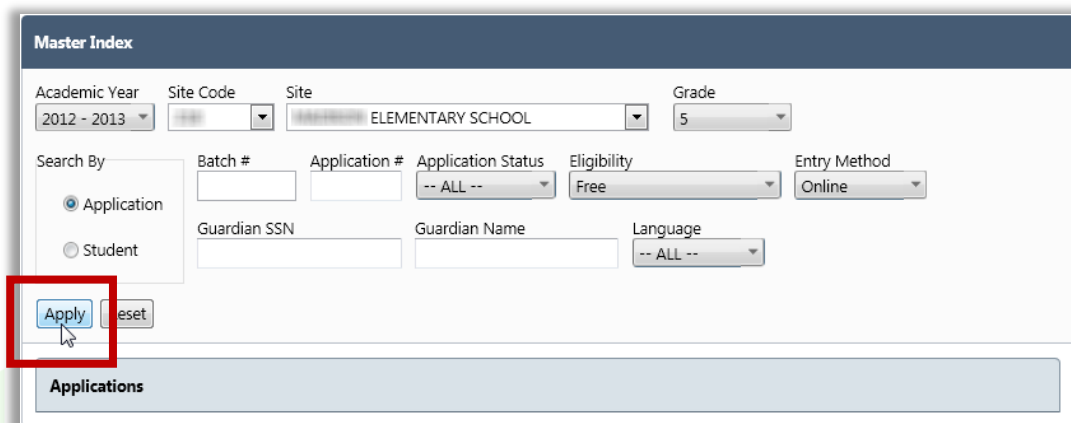
Multiple search conditions are used to narrow the search for an application.

---

### Display Application

To display an application by application

1. Verify “Application” is selected in the Search By group.
2. Select search conditions and click **Apply**.
3. Click the [Application #](#) link to display the application.



**To display an application by student**

1. Verify “Student” is selected in the Search By group.
2. Select “**Student**” in the **Search By** group.
3. Select search conditions and click **Apply**.
4. Click the [Application #](#) link to display the application.

**Master Index**

Academic Year: 2017 - 2018 | Site Code: -- ALL -- | Site: -- ALL -- | Grade: -- ALL --

Search By:   
 Application   
 **Student**

Student ID: [ ] [ ... ]   
 Eligibility: -- ALL --

**Apply** **Reset**

**Applications** Export to Excel

Application #	Batch #	Entry Method	Student	Grade	Site	Eligibility	Application Status
5156	388	Manual	[REDACTED], MENA	PK	[REDACTED]	Free	Processed
5157	388	Manual	[REDACTED], ALEXA JORDAN	7	[REDACTED] MIDDLE SCHOOL	Free	Notified
5157	388	Manual	[REDACTED], BRITTANY N	10	[REDACTED] HIGH SCHOOL	Free	Notified
5158	388	Manual	[REDACTED] CHELSEA JONNA	12	[REDACTED] HIGH SCHOOL		Incomplete
5158	388	Manual	[REDACTED] LINDY HUTCHINSON	1	[REDACTED] ELEMENTARY SCHOOL		Incomplete
5159	388	Manual	[REDACTED], GABRIELLE CARMELA	8	[REDACTED] MIDDLE SCHOOL	Free	Notified
5160	388	Manual	[REDACTED] TAYLER NICOLE	12	[REDACTED] HIGH SCHOOL	Free	Notified
5161	388	Manual	[REDACTED] CARLEIGH	3	[REDACTED] ELEMENTARY SCHOOL	Free	Notified
5162	389	Manual	[REDACTED] NICHOLAS ANTHONY	3	[REDACTED] ELEMENTARY SCHOOL		Deleted

Page size: 10 | 9 items in 1 pages

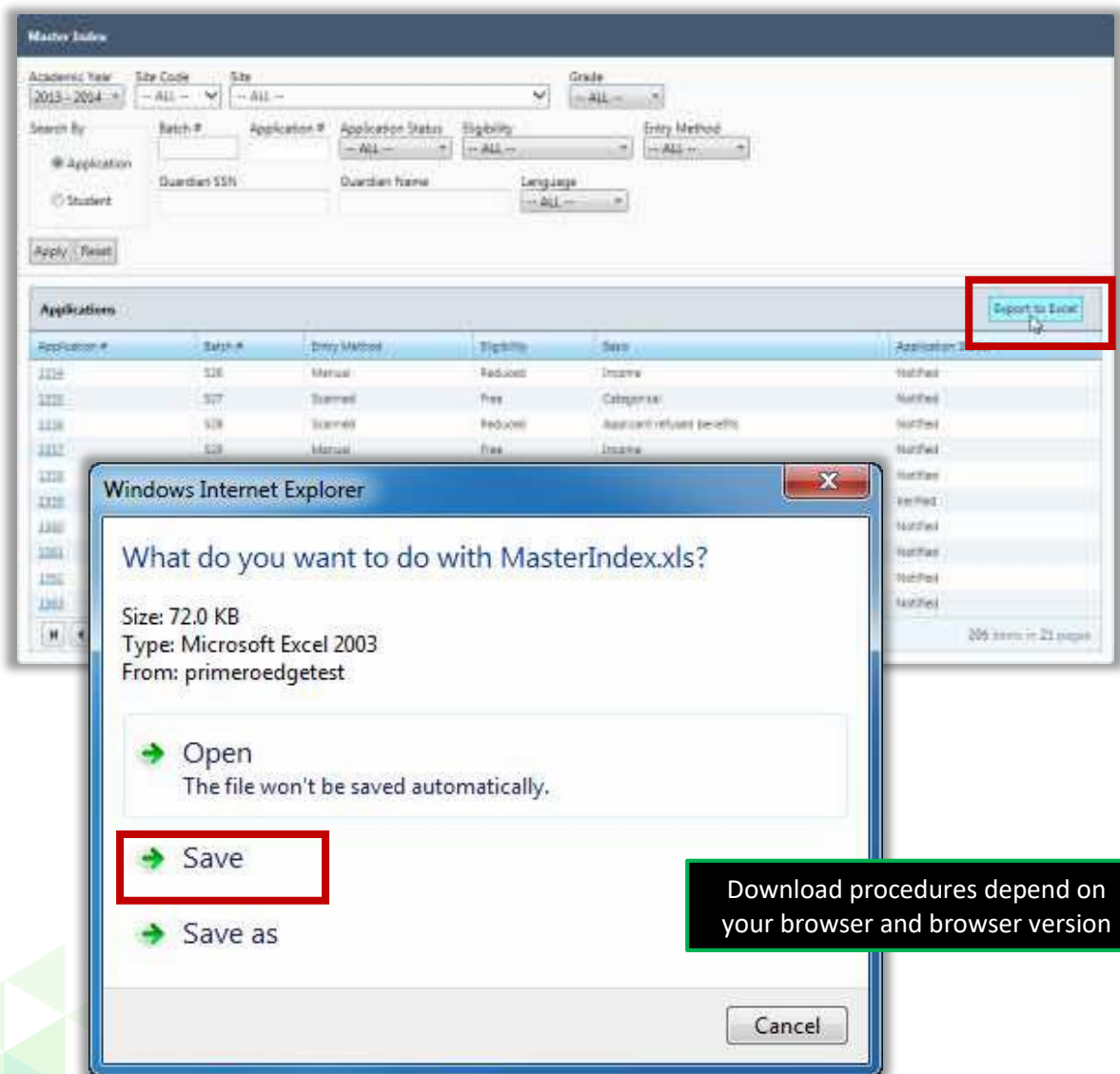


### Export Applications List

An application list can be exported to an MS Excel file for further review.

#### To export the Applications list

1. Display a list of applications.
2. Click Export to Excel.
3. Click **Save As** and choose a file location.
4. Enter a name for the file and click **Save**.



**Tab 1: Application Info**

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

- **Validate**—opens the application in the Validation Workspace.
- **Notification...**—sends Notification of Approval letter.
- **Add for Verification**—includes the application in the verification process; the verification reason is marked “for cause” and is not part of the required sample. Verification is explained in Chapter 7 in this user manual.

Application #: 5157 (2 of 6) Batch #: 388

Validate Notification ...

Application Info Optional Info Guardian Info History Refuse Benefits Image/Documents

Application # 5157 Entry Method Manual Date Received 1/29/2018 Language English Add For Verification

Household Size 2 Total Income (Y) \$0.00 Application SSN 1235  No SSN  Application is signed

**Students**

Student ID	Name	Site	Grade	Direct Approval	Birth Date
137	BRITTANY N	0514	10	Yes (Head Start)	6/16/1994
871	ALEXA J	0406	07	Yes (Foster)	8/5/1998

**Household Members**

Name	Work	Assistance	Other	No Income
ALEXA J	--	--	--	<input checked="" type="checkbox"/>
BRITTANY N	--	--	--	<input checked="" type="checkbox"/>

All data on this tab is read-only.

The number of tabs shown for an application is dependent on the application status. When an application has been added to the verification process two additional tabs appear: Verification Info and Verification Response.

### Tab 2: Optional Info

The **Optional Info** tab displays Ethnicity, Race and Other Benefits information collected from applications, if provided. See page 207 for an example of Other Benefits in Online Applications.

Application #: 5157 (2 of 6) Batch #: 388

Validate Notification ...

Application Info **Optional Info** Guardian Info History Refuse Benefits Image/Documents

Ethnicity

- Hispanic or Latino
- Not Hispanic or Latino
- Not Provided

Race

- Asian
- American Indian or Alaskan Native
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White

Other Benefits

All data on this tab is read-only.

### Tab 3: Guardian Info

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

Application #: 5157 (2 of 6) Batch #: 388

Validate Notification ...

Application Info Optional Info **Guardian Info** History Refuse Benefits Image/Documents

Guardian Name  
Jack

Address in PrimeroEdge ?

Address: 2262 KAY NEVA LN Apt:   
City:  State:  Zip:   
Home:  2262 Work:  4172  
Email:

Address on Application ?

Address: 1234 Ray Rd Apt:   
City:  State:  Zip:   
Home:  8899 Work:  2768  
Email: Jack

All data on this tab is read-only.

**Tab 4: History**

The History tab details the date, time and PrimeroEdge user (Official) who completed each step in the application process with comments shown below the history listings.

Application #: 5157 (2 of 6) Batch #: 388

Validate Notification ...

Application Info Optional Info Guardian Info **History** Refuse Benefits Image/Documents

Application Status: Verified Eligibility: Reduced Basis: Applicant refused benefits End Date: 7/31/2018

Application Status History		
Application Status	Date / Time	Official
Verified	1/31/2018 9:06:43 AM	Cybersoft Support
Notified	1/29/2018 9:41:06 PM	Cybersoft Support
Processed	1/29/2018 4:54:34 PM	Cybersoft Support
Partially Validated	1/29/2018 2:56:21 PM	Cybersoft Support

New Comment (Limited to 500 Characters)

Add Comment

Previous Comments

1/31/2018 9:06:43 AM Cybersoft Support  
Parent declined benefits.

All data on this tab is read-only.  
Comments can be added.

**To add comments**

1. Enter text in New Comment.
2. Click **Add Comment**.

**Tab 5: Refuse Benefits**

The Refuse Benefits tab allows for recording of refusal of benefits by the parent or guardian.

Application #: 5157 (2 of 6) Batch #: 388

Validate Notification ...

Application Info Optional Info Guardian Info History Refuse Benefits Image/Documents

Eligibility Free Basis Income

**Refuse Benefits**

Result Reduced Start Date 2/1/2018

Comments (Limited to 500 Characters)  
Parent declined benefits.

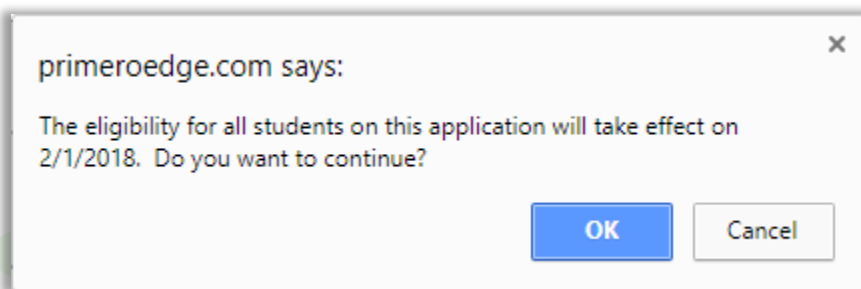
Refuse Benefits

User: Cybersoft Support

Eligibility and Basis data on this tab is read-only. Refusal can be recorded.

**To record refusal of benefits**

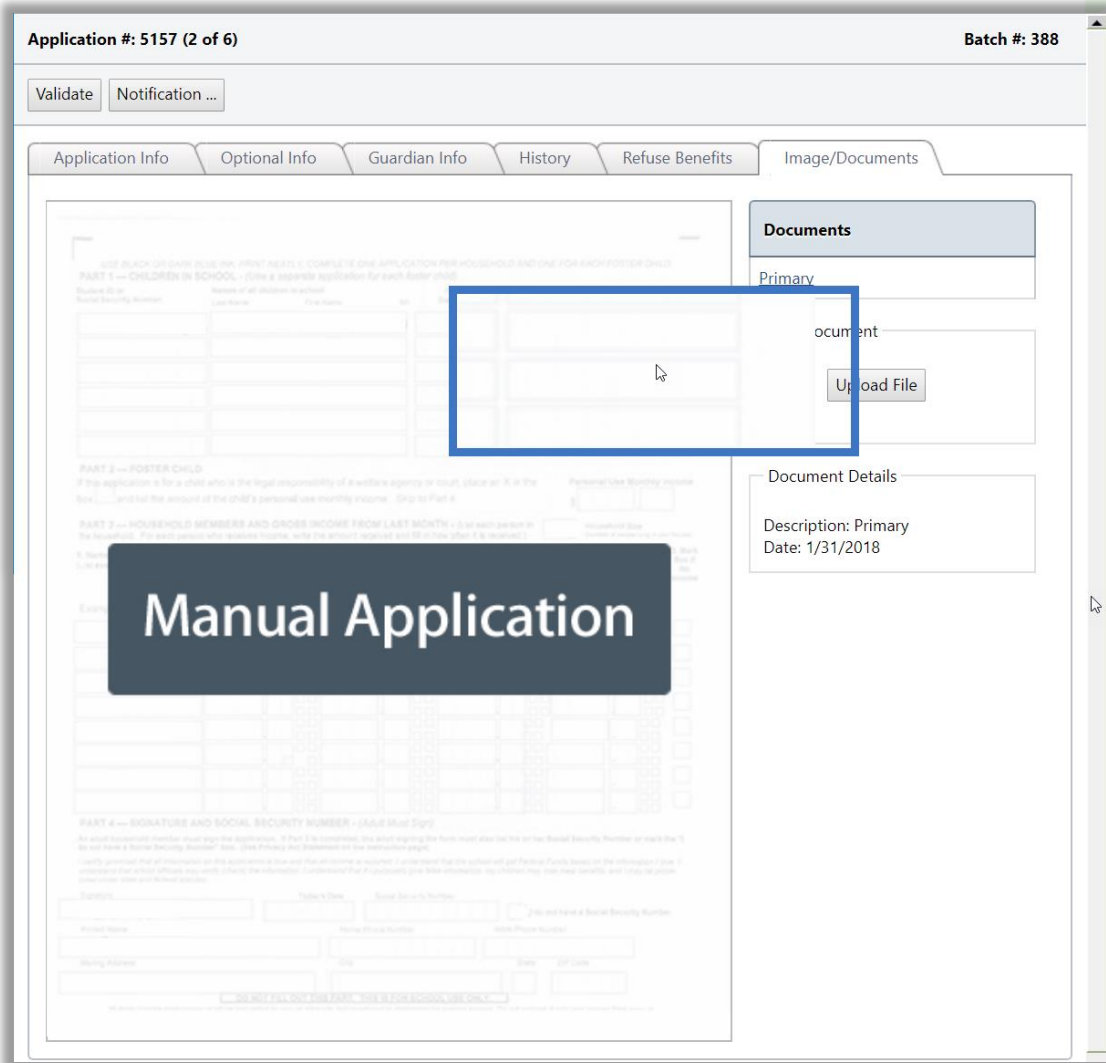
1. Enter or select a Start Date
2. Enter text in Comments to document the refusal (optional).
3. Click **Refuse Benefits**.



4. Click **OK** to confirm the refusal.

**Tab 6: Image/Documents**

The Image/Documents tab displays digital images of the application and other supporting documents that have been scanned or uploaded. The list of available documents is shown in the documents group.



**To scan a document**

- Place the document in the scanner and click **Scan**.

**To display a document in the image window**

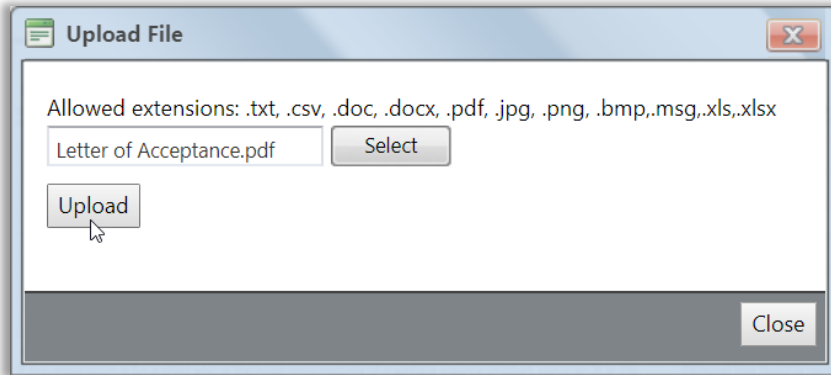
- Click a document name link in the **Documents** group.

**To magnify an area of a digital image**

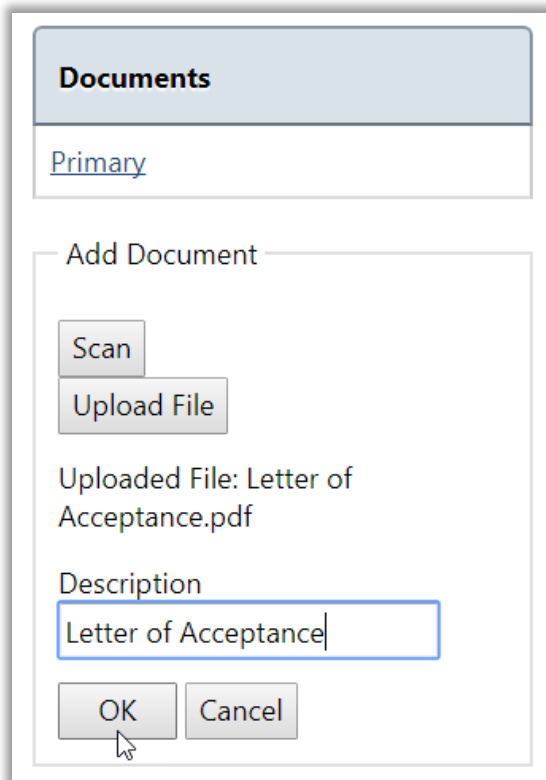
- Hover the mouse cursor over the image.

**To upload a document**

1. Click **Upload File**.
2. Click **Select**, choose a file, and click **Open**.



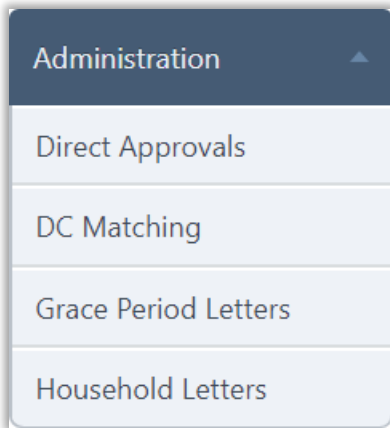
3. Click **Upload**.



4. Enter a name for the uploaded file in Description and click **OK**.



## Chapter 3: Administration

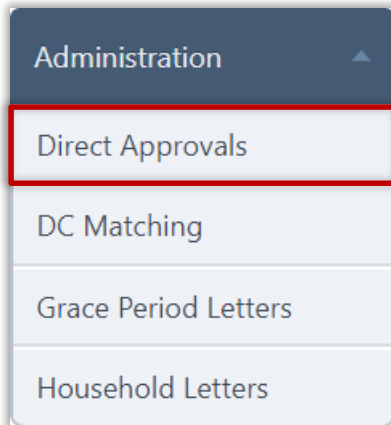


The **Administration** menu (second menu in the Student Eligibility module) offers functions for managing eligibility assignment via Direct Approvals. Sending Grace Period notification letters and Household notice of approval letters.

In this chapter you will learn how to:

- Search by Approval or Student.
  - Extend benefits for Sibling Direct Approvals.
  - View and update Temporary Approvals.
  - View a Grace Period letter as it would be printed.
  - Print one, all, or selected Grace Period letters.
  - View a Household Letter as it would be printed.
  - Print one, all, or selected Household Letters.
- ▲ Modules, menus, and menu selections available to you correspond to your user role and the modules selected by your organization.

## Direct Approvals



**Direct Approvals** are eligibilities that do not come from application income data and are not subject to the Verification process. Some examples of Direct Approval types are Homeless, Head Start, and Direct Certification.

Direct Approvals can be imported via a file (Direct Certification, for example) or manually entered (Homeless list, for example). File imports are most commonly used for Direct Certification lists. Manual entry is most often used for non-Direct Certification types of Direct Approvals, such as Homeless.

### Import Direct Approval File

#### To import a direct approval file

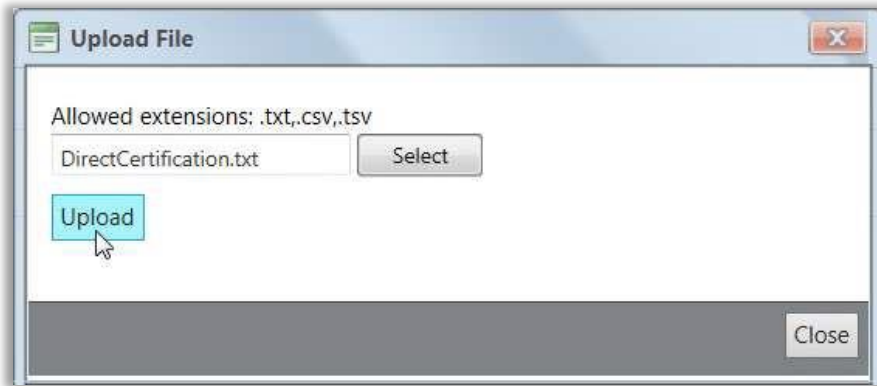
1. Click **New**.
2. In Approval Type, select “Direct Certification” and click **Apply**.

 A screenshot of a web form titled 'New Direct Approval'. At the top left is a link '<a href="#">< Back to Direct Approval List</a>'. Below this is a label 'Approval Type:' followed by a dropdown menu showing 'Direct Certification'. To the right of the dropdown are two buttons: 'Reset' and 'Apply'. The 'Apply' button is highlighted with a mouse cursor. At the bottom right of the form are two buttons: 'Cancel' and 'Process'.

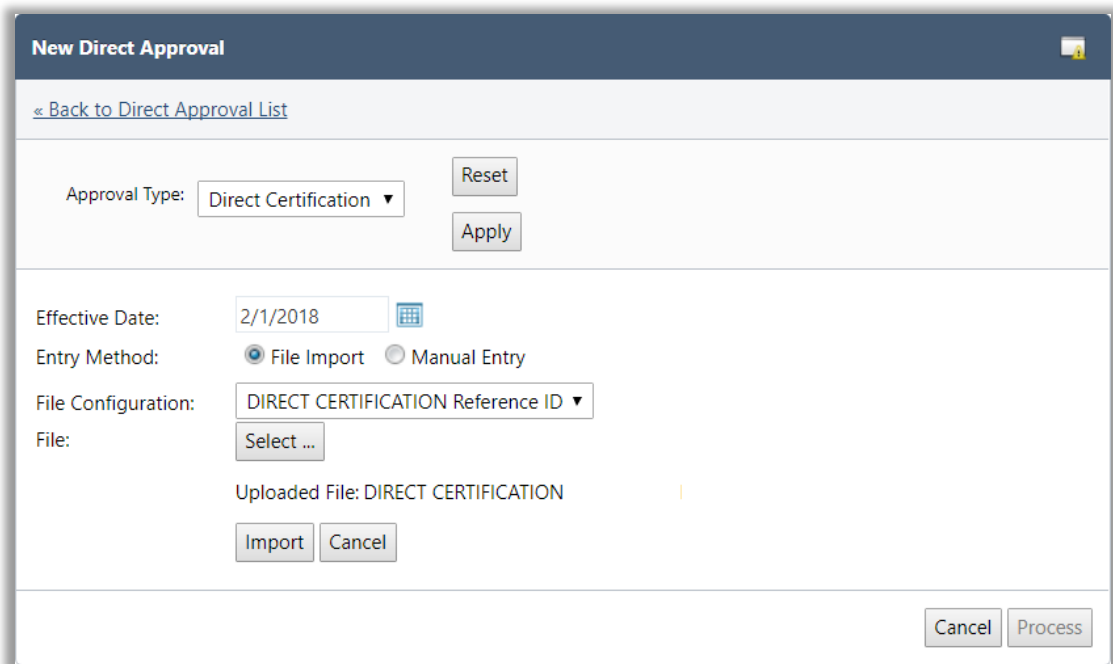
3. Choose “File Import”, select the File Configuration to use, and click **Select**.

 A screenshot of the 'New Direct Approval' form, showing the next step. The 'Approval Type' dropdown is still set to 'Direct Certification'. Below it are 'Apply' and 'Reset' buttons. The 'Entry Method:' section has two radio buttons: 'File Import' (which is selected) and 'Manual Entry'. Below this is a 'File Configuration:' dropdown menu set to 'Direct certification Import'. Underneath is a 'File:' label followed by a 'Select ...' button, which is highlighted with a mouse cursor. At the bottom right are 'Cancel' and 'Process' buttons.

4. In the Upload popup, click **Select**, select a file, and click **Open**.
5. In the Upload popup, click **Upload**.



6. Click **Import**.



As the file is imported, a progress bar displays the status of the import process. A total number of students on file is listed. At this point, you can choose to process the imported file or you can wait to perform the processing at a later time.

**New Direct Approval**

[« Back to Direct Approval List](#)

Approval Type: Direct Certification

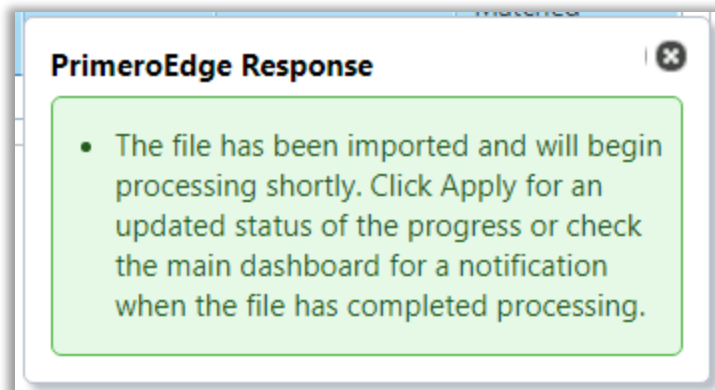
File Configuration: DIRECT CERTIFICATION Reference ID

File:

**Summary** Note: Students with a higher DC precedence from a prior approval will not be processed.  
Students on File: 1

7. Click **Process**.

After clicking the **Process** button the system will respond with green message stating “The file has been imported and will begin processing shortly...”



8. Choose Direct Certification from the “File Details” filter and click **Apply** for an updated status of the progress.

- When the matching process is complete, Click the **File Number** (example: [1010](#)) to display the View Direct Approval window. The Summary tab of the View Direct Approval page appears with results of the matching process.

**Direct Approvals**

Academic Year: 2017 - 2018 Search By:  Approval  Student

**Date**  
 File  
 From:    
 To:

**File Details**  
 Approval Type: Direct Certification  
 File Number:

Matched Students count at the time of import. This number may be greater than the file detail Matched Students count due to students becoming inactive after the import.

	File Number	Approval Type	Status	Update Date	File Date	User	Matched Students
>	<a href="#">1834</a>	Direct Certification	Processed	2/1/2018 9:18 PM	2/1/2018	Cybersoft Support	1
>	<a href="#">1833</a>	Direct Certification	Processed	1/31/2018 3:10 PM	1/31/2018	Cybersoft Support	0
>	<a href="#">1832</a>	Direct Certification	Processed	1/23/2018 5:27 PM	1/23/2018	Cybersoft Support	0
>	<a href="#">1831</a>	Direct Certification	Processed	1/23/2018 5:25 PM	1/23/2018	Cybersoft Support	0
>	<a href="#">1830</a>	Direct Certification	Processed	1/23/2018 5:24 PM	1/23/2018	Cybersoft Support	0
>	<a href="#">1829</a>	Direct Certification	Processed	1/23/2018 5:18 PM	1/23/2018	Cybersoft Support	0
>	<a href="#">1828</a>	Direct Certification	Processed	1/22/2018 5:31 PM	1/1/2018	Cybersoft Support	0
>	<a href="#">1827</a>	Direct Certification	Processed	1/22/2018 5:21 PM	7/1/2017	Cybersoft Support	1
>	<a href="#">1826</a>	Direct Certification	Processed	1/22/2018 5:15 PM	1/1/2018	Cybersoft Support	0
>	<a href="#">1825</a>	Direct Certification	Processed	1/22/2018 5:13 PM	1/22/2018	Cybersoft Support	1

Page size: 10 108 items in 11 pages

**To search by Approval**

- Select “Approval” in Search By.
- Select an Approval Type in the File Details group.
- Select From and To dates and enter a File Number, if needed. (optional)
- Click **Apply**.

**To search by student**

- Select “Student” in Search By.
- Select an Approval Type in File Details.
- Enter and select Student Details, File Details, Date, and Match Method as needed (optional).
- Click **Apply**.

### View Direct Certification Results

When a direct certification process is completed, the View Direct Approval page appears with 3 tabs of information.

The first tab, Summary, provides details about the direct approval process.

**View Direct Approval - File Number 1023**

[Back to Direct Approval List](#)

Summary | Matched | Potential Matches

File Number: 1023  
 Approval Type: Direct Certification  
 File Status: Processed  
 Status Change Date: 10/13/2017  
 User Name: Cybersoft Support

Total Records On File	
<b>Total Records On File</b>	<b>363</b>
<b>Matched Students *</b>	<b>256</b>
SNAP	255
Non-SNAP	1

\* Only active students are considered for matching according to DC precedence.

Eligibility Results	
Reason	Total
Changed from PAID	4
Changed from REDUCED	2
Changed from FREE -- CATEGORICAL	12
Changed from FREE -- DCTANF	233
Changed from FREE -- HOMELESS	1
Changed from FREE -- INCOME	4

The second tab, Matched, displays a list of all active students in PrimeroEdge that matched those listed on the imported Direct Certification list or manually entered *and were not on a previously imported file.*

**View Direct Approval - File Number 1023**

[Back to Direct Approval List](#)

Summary | Matched | Potential Matches

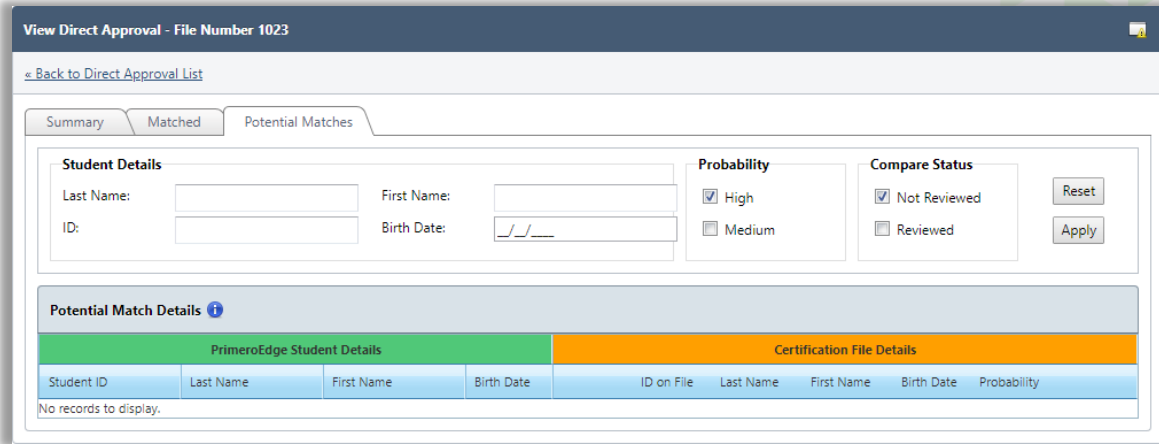
**Options**

Exclude Previously Notified Students  Exclude Previously Free Students Apply

**Matched Students** Notify All Notify

ID	Last Name	First Name	Site	Grade	File #	File Date	Match Date	Effective Date	Match Method	Notified On	Email	Print
>	63	Cameron	104	02	1023	10/13/2017	10/13/2017	10/13/2017	System		<input type="checkbox"/>	<input type="checkbox"/>
>	11	Isaac	001	09	1023	10/13/2017	10/13/2017	10/13/2017	System		<input type="checkbox"/>	<input type="checkbox"/>
>	10	Joe David	001	12	1023	10/13/2017	10/13/2017	10/13/2017	System		<input type="checkbox"/>	<input type="checkbox"/>

The Potential Matches tab displays students in the PrimeroEdge database (left-hand column—green title bar) with a possible match to students in the imported file (right-hand column—gold title bar) but requires further research to confirm the match. By default, only High probability matches are displayed.



See pages 90–91 for a description of all available functions on this tab.

## Un-Matching a Student

If you determine that a match was made in error, the student can be “unmatched”.

### To un-match a matched student

1. Expand a student listing.
2. Click **Unmatch**.

View Direct Approval - File Number 1486

[Back to Direct Approval List](#)

Summary Matched Potential Matches

**Options**

Exclude Previously Notified Students  Exclude Previously Free Students Apply

**Matched Students** Notify All Notify

ID	Last Name	First Name	Site	Grade	File #	File Date	Match Date	Effective Date	Match Method	Notified On	Email	Print
4361019	Madrid	Jorge	208	PK	1486	10/19/2017	10/19/2017	10/19/2017	Manual		<input type="checkbox"/>	<input type="checkbox"/>

**Case #:**

**Address:**

**Name on File:** Jorge

**DC Type:** SNAP

**Guardian Name:**

**Birth Date:** 10/26/1954

**Matching Criteria:** Manual Match

Unmatch

Enter comments regarding the unmatched action.

- ▲ To prevent matches on future imports, verify that the “Do not match” option is selected.
3. Click **OK**

Unmatch Comments

Do not match student on future DC imports

**Comment** (Limited to 500 Characters)

incorrect student id

OK Cancel



## Direct Approval Manual Entry

To manually enter a direct approval

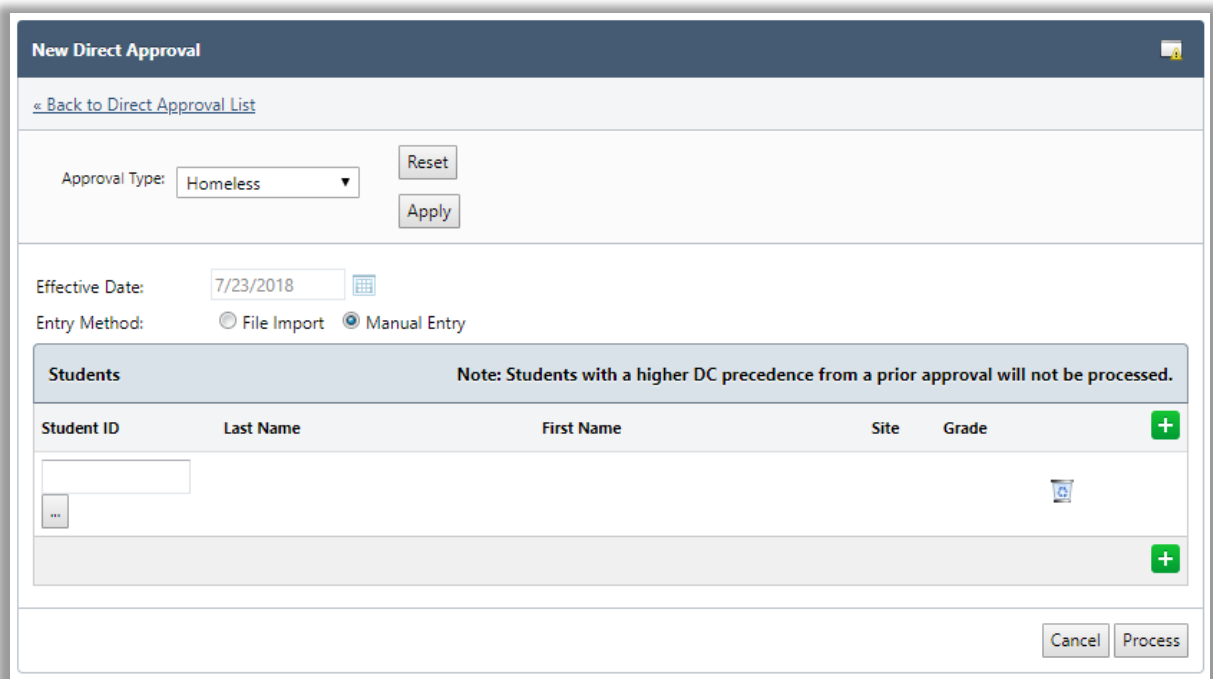
1. Click **New**.
2. Select an Approval Type and click **Apply**.



The screenshot shows a web form titled "New Direct Approval". At the top left is a link "[← Back to Direct Approval List](#)". Below this is a section for "Approval Type" with a dropdown menu currently set to "Homeless". To the right of the dropdown are two buttons: "Reset" and "Apply". At the bottom right of the form are two buttons: "Cancel" and "Process".

3. Select "Manual Entry" in Entry Method.

The page expands to display the Students group.



The screenshot shows the "New Direct Approval" form expanded. It includes the "Approval Type" dropdown (set to "Homeless") and "Apply" button. Below this is the "Effective Date" field (set to "7/23/2018") and the "Entry Method" section with radio buttons for "File Import" and "Manual Entry" (which is selected). A section titled "Students" contains a table with columns: "Student ID", "Last Name", "First Name", "Site", "Grade", and a "+" icon. A note above the table reads: "Note: Students with a higher DC precedence from a prior approval will not be processed." The table has one row with a search input field and a trash icon. At the bottom right are "Cancel" and "Process" buttons.

4. In Student ID, enter all students to be included for this approval type by either:
  - \* Entering a student identification number, or
  - \* Using **Lookup** to search for a student in the Lookup popup.
- ▲ Up to 25 students can be entered on one page.

**New Direct Approval**

[← Back to Direct Approval List](#)

Approval Type:

Effective Date:

Entry Method:  File Import  Manual Entry

**Students** Note: Students with a higher DC precedence from a prior approval will not be processed.

Student ID	Last Name	First Name	Site	Grade	
<input type="text" value="943"/>	R	Orra	6615	5	<input type="button" value="Lookup"/>
<input type="text" value="1660"/>	N	Red	9021	9	<input type="button" value="Lookup"/>
<input type="text" value="480"/>	Pi	Jill	9021	7	<input type="button" value="Lookup"/>
<input type="text"/>					<input type="button" value="Lookup"/>

5. Click **Process**.

- ▲ As each student is processed, a green check mark appears next to his/her name. The View Direct Approval page appears when the approval process is completed.

When the processing of all students in the file is complete, the View Direct Approval page appears with the Summary tab shown.

## View Direct Approval Results

### Summary Tab

The **Summary** tab displays details of the processed direct approval file, including the total number of matched and unmatched students and eligibility results.

**View Direct Approval - File Number 1017**

[Back to Direct Approval List](#)

Summary | Students

File Number: 1017  
 Approval Type: Homeless  
 File Status: Processed  
 Status Change Date: 7/23/2018  
 User Name: ...

Supporting Documentation: 0 [View / Add](#)

Eligibility Results	
Reason	Total
Changed from PAID	3
Changed from REDUCED	0
Changed from FREE	0

Total Records On File	
<b>Total Records On File</b>	<b>3</b>
<b>Matched Students *</b>	<b>3</b>
SNAP	0
Non-SNAP	3

\* Only active students are considered for matching according to DC precedence.

### Students Tab

The **Students** tab displays a list of all active students in PrimeroEdge that received the direct approval status.

**View Direct Approval - File Number 1017**

[Back to Direct Approval List](#)

Summary | Students

**Options**

Exclude Previously Notified Students  Exclude Previously Free Students [Apply](#)

**Matched Students** [Notify All](#) [Notify](#)

ID	Last Name	First Name	Site	Grade	File #	File Date	Match Date	Effective Date	Match Method	Notified On	Print
2660	N	Red	9021	09	1017	7/23/2018	7/23/2018	7/23/2018	Manual		
4480	Pr	Jill	9021	07	1017	7/23/2018	7/23/2018	7/23/2018	Manual		
2943	Ri	Orra	6615	05	1017	7/23/2018	7/23/2018	7/23/2018	Manual		

## Notifying Direct Approvals

Notification by email or printed letter can be sent from this tab.

### To view a letter as it would appear printed

- Click **View** in the Print column in a student listing.

### To notify students by letter

1. Select one or more Print checkboxes or select Print in the column header.
2. Click **Notify**.

Matched Students												Notify All	Notify
ID	Last Name	First Name	Site	Grade	File #	File Date	Match Date	Effective Date	Match Method	Notified On	Email	Print	
184		NANCY	501	09	1532	1/31/2018	1/31/2018	1/31/2018	Manual			<input checked="" type="checkbox"/>	
708		ZACHARY	501	09	1532	1/31/2018	1/31/2018	1/31/2018	Manual			<input checked="" type="checkbox"/>	
748		BRAYDON	201	KG	1532	1/31/2018	1/31/2018	1/31/2018	Manual			<input checked="" type="checkbox"/>	
016		MEAGAN	901	05	1532	1/31/2018	1/31/2018	1/31/2018	Manual			<input checked="" type="checkbox"/>	

3. Select a Letter Format, the Letter Address, and Sort By options in the print popup.
4. Click **Notify**.

**Letter Format**

Individual  Household

**Print Options**

**Letter Address**

Address in PrimeroEdge  Address on File

**Sort By**

Zip Code  Site Code  Last Name

### Direct Approval – DC Medicaid

Direct Certifications via Medicaid are processed either by file import or by manual import. The file import is processed using the same procedure outlined under - Import Direct Approval File.

- Use the file import method when processing the Free – Direct Certified Medicaid student file.
- Use the manual import method when importing the Reduced – Direct Certification Medicaid student file.

**New Direct Approval**

[« Back to Direct Approval List](#)

Approval Type:

Effective Date:

Entry Method:  File Import  Manual Entry

Eligibility Type:  Free  Reduced

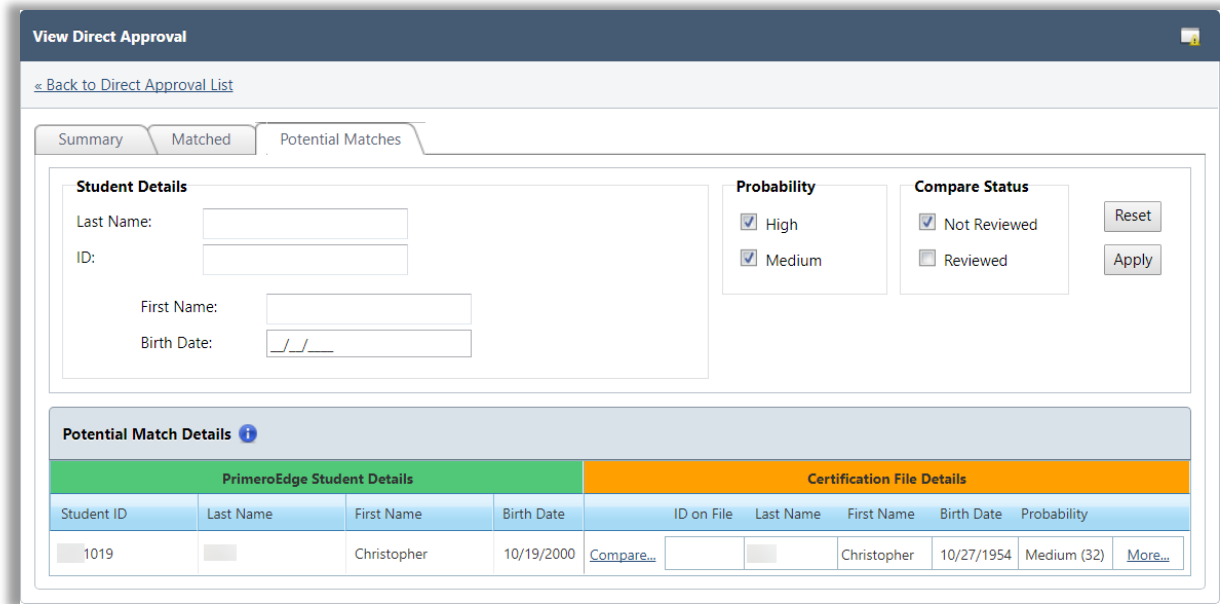
**Students** Note: Students with a higher DC precedence from a prior approval will not be processed.

Student ID	Last Name	First Name	Site	Grade	
<input type="text"/>					<input type="button" value="+"/>
<input type="text"/>					<input type="button" value="+"/>

- ▲ When processing the DC Medicaid file using the manual entry method be sure to select the appropriate.

**Potential Matches**

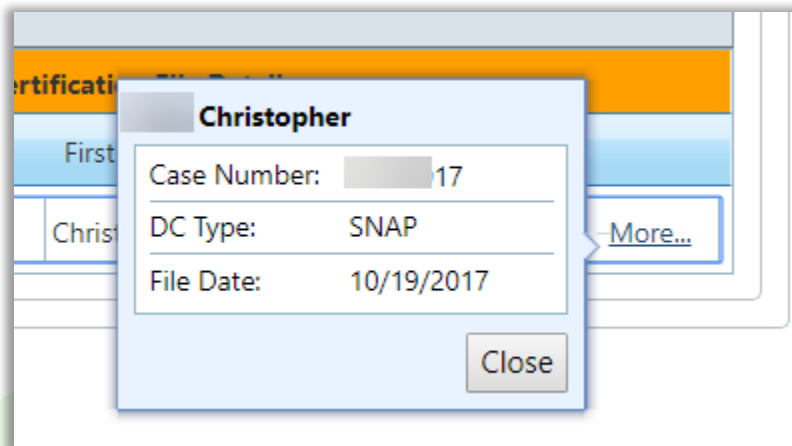
The Potential Matches tab displays students in the PrimeroEdge database (left-hand column—green title bar) with a possible match to students in the imported file (right-hand column—gold title bar) but requires further research to confirm the match.



Two tools are available to make a possible match.

**To see additional information from the imported file for the student**

- Click **More...**



**To view a comparison of data stored in PrimeroEdge with file details**

- Click **Compare**.

The comparison popup provides multiple methods for comparing the data. The probability that the two records are matching, is shown about the action buttons.

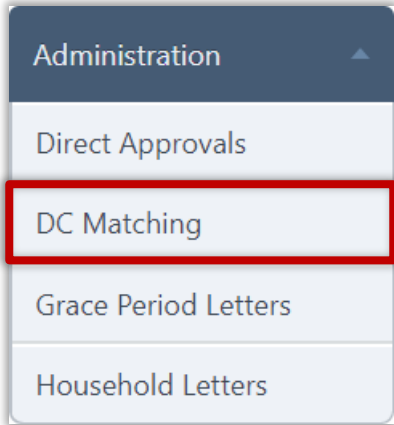
Christopher			
Matching Criteria	Student Details	File Details	Points
SSN			0
Student ID	1019		0
Full Name	Christopher	Christopher	0
First and Last Name	Christopher	Christopher	20
Last and Middle Name			0
First and Middle Name	Christopher	Christopher	0
Last Name			0
First Name	Christopher	Christopher	0
DOB	10/19/2000	10/27/1954	0
Phonetic First Name	xrstfr	xrstfr	0
Phonetic Last Name	Lw	Lw	0
SOUNDEX First Name	C623	C623	0
SOUNDEX Last Name	L000	L000	0
Modified First Name	Christopher	Christopher	0
Modified Last Name			0
Name Twist Full Name	Christopher	Christopher	0
Name Twist First and Last Name	Christopher	Christopher	0
Variable DOB	10/19/2000	10/27/1954	0
DOB Month Year Twist	10/19/2000	10/27/1954	0
Street Address			0
Guardian			0
Phone 1			0
Phone 2			0
Code(s)	Lewis	Lewis	12
<b>Total - 32 (Medium)</b>			

Match Probability

**After reviewing the comparison data**

- To match the student in PrimeroEdge with the student in the import file, click **Match**.
- To mark the student record as having been reviewed but not matched, click **Mark as Reviewed**.
- Click **Close** to not make a match nor mark the record as having been reviewed.

## DC Matching

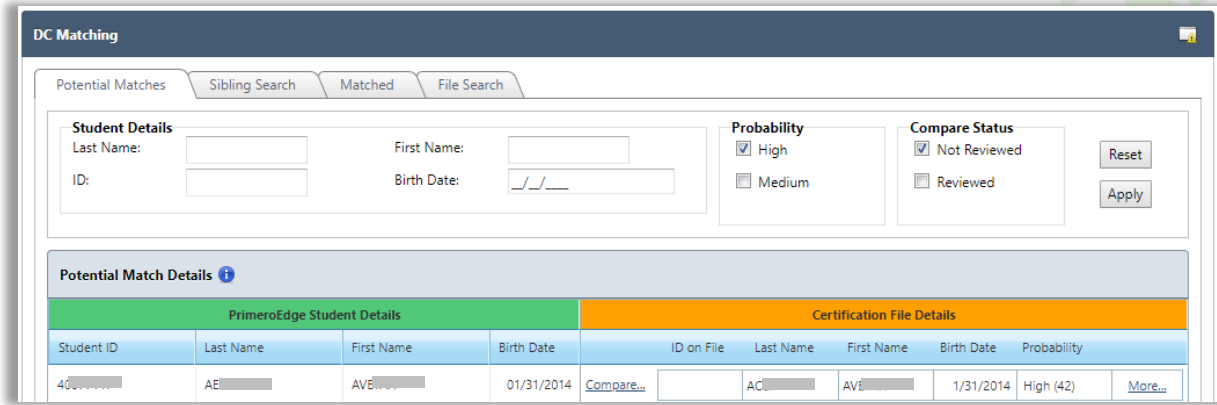


**DC Matching** extends benefits to the brothers and sisters of a child approved through Direct Certification. The process can be completed automatically by matching students based on household, address, or guardian, or a manual match process can be used.



### Potential Matches Tab

The Potential Matches tab displays students in the PrimeroEdge database (left-hand column—green title bar) with a possible match to students in import files (right-hand column—gold title bar). Further research is required to confirm the match.



Matches are processed on this tab using the same techniques described for the Potential Matches tab in Direct Approvals. See pages 890—91 for a description of those techniques.

## Sibling Search Tab

### Household, Address, Guardian Match

#### To match by household, address, or guardian

1. Choose a match Method:
  - By Household—match students with same household on file; check the “Last Name Match Required” option to narrow possible matches.

The screenshot shows the 'DC Matching' window with the 'Sibling Search' tab active. Under the 'Method' section, the radio button for 'By Household' is selected. An 'Apply' button is visible to the right. Below the method selection, a header reads 'Sibling Matches by Household'.

- By Address—match students with same address on file. Select Last Name Match Required to only display students with the same last name.

The screenshot shows the 'DC Matching' window with the 'Sibling Search' tab active. Under the 'Method' section, the radio button for 'By Address' is selected. A checkbox labeled 'Last Name Match Required' is checked. An 'Apply' button is visible to the right. Below the method selection, a header reads 'Sibling Matches by Address'.

- By Guardian—match students with same guardian on file. Enter the guardian’s exact last name in Last Name and exact first name in First Name.

The screenshot shows the 'DC Matching' window with the 'Sibling Search' tab active. Under the 'Method' section, the radio button for 'By Guardian' is selected. There are two input fields labeled 'Last Name' and 'First Name' to the right of the method selection. An 'Apply' button is visible to the right of the 'First Name' field. Below the method selection, a header reads 'Sibling Matches by Guardian'.

2. Click **Apply**.

The screenshot shows the 'DC Matching' application window. At the top, there are tabs for 'Potential Matches', 'Sibling Search', 'Matched', and 'File Search'. Below the tabs, there are radio buttons for 'Method': 'By Household', 'By Address' (selected), 'By Guardian', and 'Manual'. There is a checkbox for 'Last Name Match Required' which is checked, and an 'Apply' button. Below this is a section titled 'Sibling Matches by Address' with a 'Process Matches' button and a 'Refresh' button. The main area is a table with the following columns: 'Matching Approval', 'Address', 'Student ID', 'Last Name', 'First Name', 'Site', and 'Grade'. The table contains 10 rows of data. Two groups are indicated by brackets below the table: 'Group 1' covers the first two rows, and 'Group 2' covers the remaining eight rows. At the bottom of the table, there are navigation controls (back, forward, page number 1, page size 10, and total items 188 in 19 pages).

Matching Approval	Address	Student ID	Last Name	First Name	Site	Grade
DA	DA	40	AM	HA	BURKE STREET ELEMENTARY SCHOOL	PK
CAI		40	TH	CAI	SPRING MILLS HIGH	10
JAC		40	HIE	JAC	OPEQUON ELEMENTARY SCHOOL	01
ULI		40	RU	ULI	SPRING MILLS MIDDLE SCHOOL	08
DAI		40	MA	DAI	BUNKER HILL ELEMENTARY SCHOOL	01
GOI		40	GOI	DAI	HEDGESVILLE MIDDLE SCHOOL	08
CO		40	STI	CO	MOUNTAIN RIDGE INTERMEDIATE	03
XAI		40	PAI	XAI	ROSEMONT ELEMENTARY SCHOOL	PK
ISA		40	WC	ISA	POTOMACK INTERMEDIATE SCHOOL	04
LEI		40	FAT	LEI	TOMAHAWK INTERMEDIATE SCHOOL	05

The students listed in the Sibling Matches by Household list are separated into two different groups:

- Students displayed in group 1 are currently active students whose eligibility status has been established by Direct Certification.
- Students displayed in group 2 are included in the general student list.

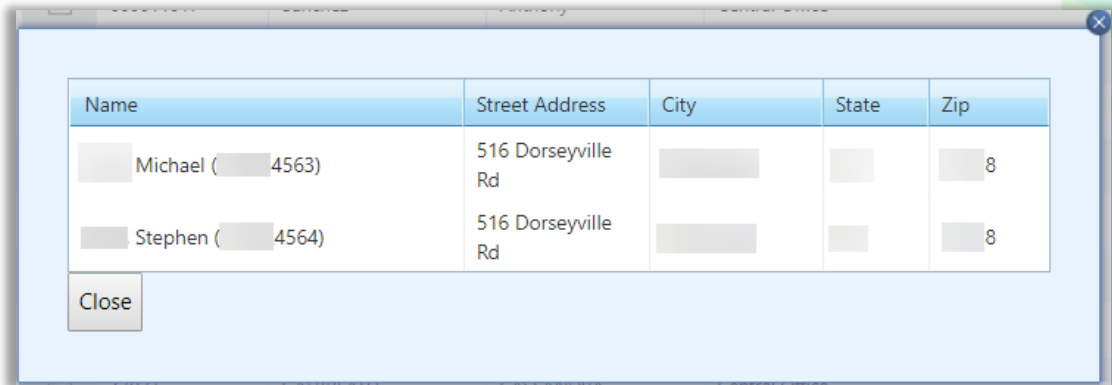
The first student in group 1 (Isaiah) has been recognized as a possible sibling match with the first student in group 2 (Anthony).

3. Click the **name** link in the Matching Approval column to compare student details. Click **Close**.

The screenshot shows a pop-up window with a table containing student details. The table has the following columns: 'Last Name', 'First Name', 'School', 'Grade', 'Student ID', 'Approved On', and 'Batch Number'. The data row shows: (Isaiah, Central Office, 04, 1618, 7/22/2017 10:42:15 AM, 1678). There is a 'Close' button at the bottom left of the window.

Last Name	First Name	School	Grade	Student ID	Approved On	Batch Number
	Isaiah	Central Office	04	1618	7/22/2017 10:42:15 AM	1678

4. Click the [View](#) link in the Address column to compare complete addresses for both students. Click **Close**.

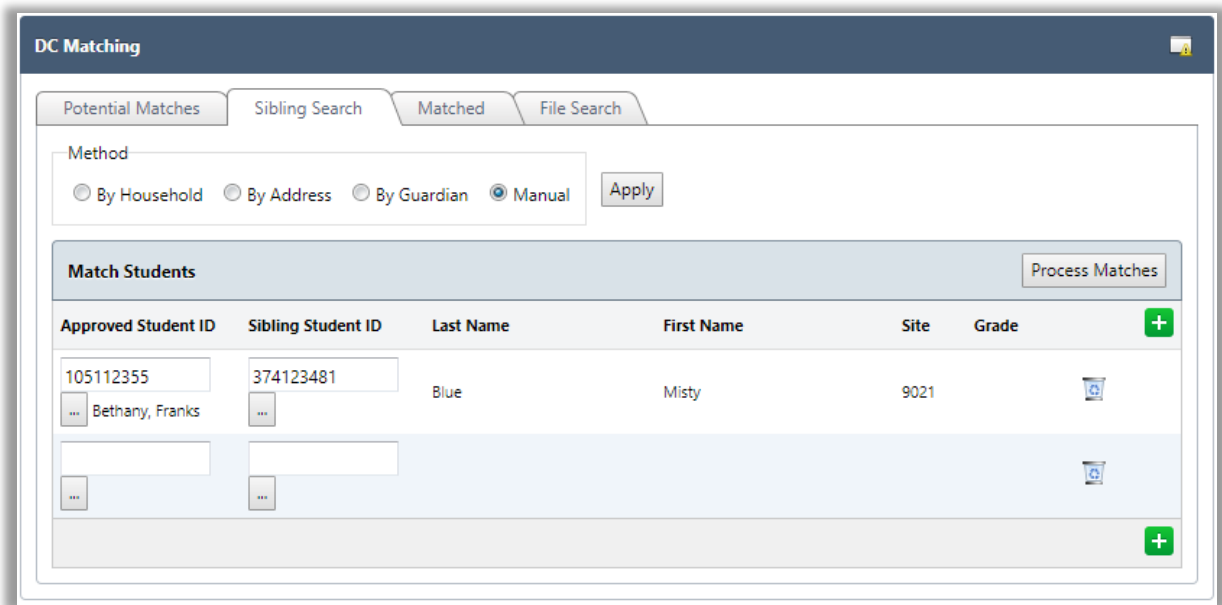


5. If the two students in the listing are a match, select the checkbox in the listing.
6. Click **Process Matches** to assign the second student in the listing the same eligibility status as the first student in the listing.

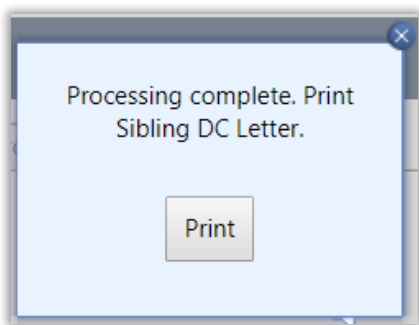
## Manual Match

### To manually match siblings

1. Choose “Manual” in the Method group and click **Apply**.
2. In Approved Student ID, enter a Student ID or use Lookup to select a student.
  - ▲ This student must have an assigned Direct Certification type.
3. In Sibling Student ID, enter a Student ID or use Lookup to select a sibling student.



4. Click Process Matches.



5. Click **Print** in the Print prompt.
6. Click **Print** in the Print window that appears.

## Matched Tab

The Matched tab displays all students that matched an active student in PrimeroEdge.

### To filter results

1. Enter search criteria in the column heading.
2. Click **Apply**.
3. Click **Reset** to return all search conditions to their default setting.

The screenshot shows the 'DC Matching' interface with the 'Matched' tab selected. The search filters include:

- Academic Year: 2018 - 2019
- Site Code: -- ALL --
- Site: -- ALL --
- Student Details: Last Name, First Name, ID, Grade (dropdown), Status (Active/Inactive)
- Date: File, Effective, Match (selected), From, To
- Match Method: System, Sibling, Manual, Transfers
- File Details: Case Number
- Options: Exclude Previously Notified Students, Exclude Previously Free Students

The 'Matched Students' table displays the following data:

ID	Last Name	First Name	Site	Grade	File #	File Date	Match Date	Effective Date	Match Method	Notified On	Print
> 4C	AB	AA	301	08	1959	7/2/2018	7/3/2018	7/2/2018	System		
> 40	AB	GA	501	12	1959	7/2/2018	7/3/2018	7/2/2018	System		
> 5E	AB	JO	215	05	1959	7/2/2018	7/3/2018	7/2/2018	System		
> 4C	AB	CH	501	12	1959	7/2/2018	7/3/2018	7/2/2018	System		
> 40	AE	CO	301	07	1959	7/2/2018	7/3/2018	7/2/2018	System		
> 4C	AB	AJI	206	01	1959	7/2/2018	7/3/2018	7/2/2018	System		
> 40	AB	JAI	306	08	1959	7/2/2018	7/3/2018	7/2/2018	System		
> 40	AB	LA	502	12	1959	7/2/2018	7/3/2018	7/2/2018	System		
> 40	AC	IO	OV	203	KG	1960	7/3/2018	7/3/2018	System		
> 40	AC	GE	502	09	1959	7/2/2018	7/3/2018	7/2/2018	System		

Page size: 10, 6915 items in 692 pages

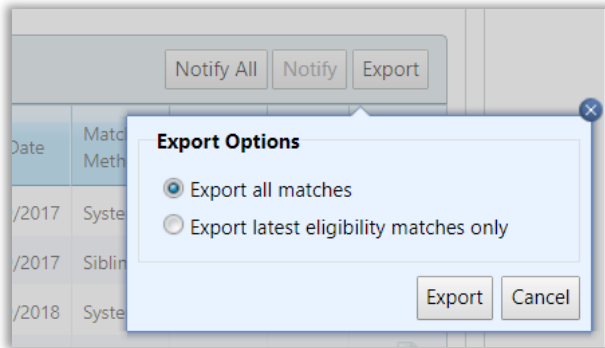
Notification can be sent to all matched students or selected students. See page 88 for the steps to use email and print notification.

A student can be unmatched following the same steps found on page 84.

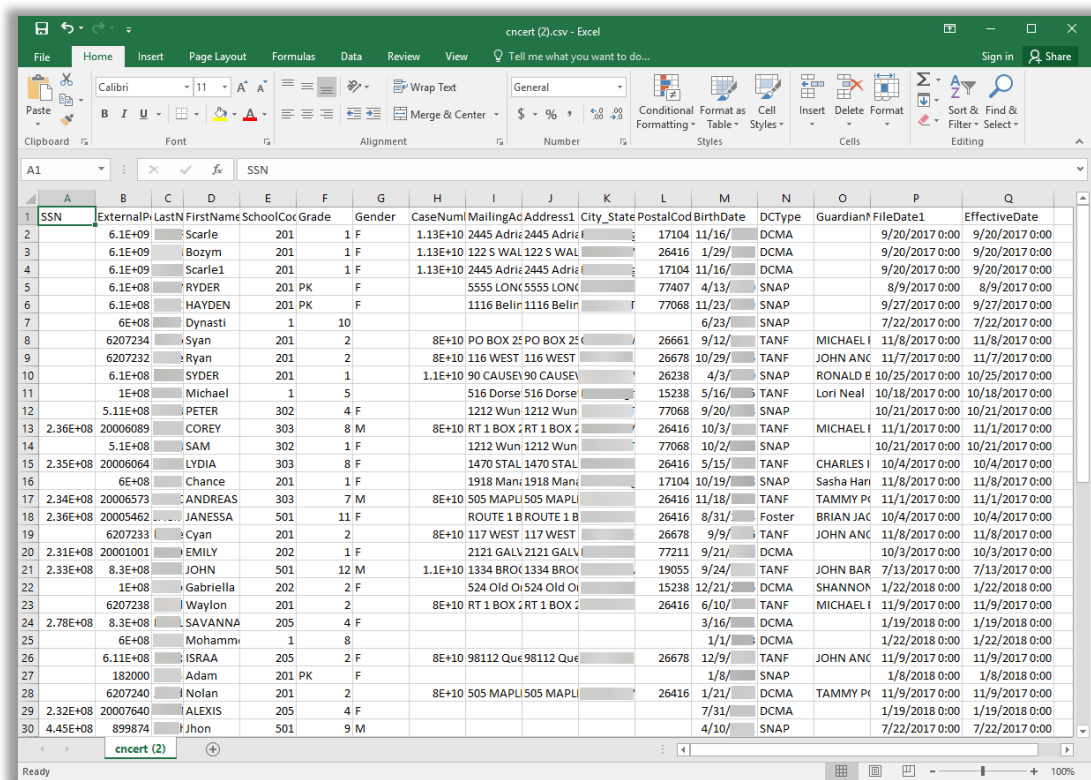
The Matched Students list can be exported to a Microsoft Excel file for additional review.

**To export the list**

1. Click **Export**.



2. Select one export option and click **Export**.
3. Click **Open** in the export popup to display the file.



4. Save the MS Excel file.

### File Search Tab

Search for a student in the upload file with a SSN and birthdate, name and birthdate, or benefits case number. Students found in the certification file are matched with students in the PrimeroEdge database. The Search tab allows you to see details of the matches.

**DC Matching**

Potential Matches | Sibling Search | Matched | **File Search**

**Search By**

SSN and Birth Date  Name and Birth Date  Case Number

**Details**

Last Name: ABSHIRE First Name: LAUREN Birth Date: 2/6/2001

**File Details**

PrimeroEdge Student Details		Certification File Details						
	Match Card	ID on File	Last Name	First Name	Birth Date	Case Number	DC Type	File Date
Automatic Match	<a href="#">View Details...</a>		ABSHIRE	LAUREN	02/06/2001	6011804462	SNAP	07/02/2018

**DC Matching**

Potential Matches | Sibling Search | Matched | **File Search**

**Search By**

SSN and Birth Date  Name and Birth Date  Case Number

**Details**

Case Number: 6011804462

**File Details**

PrimeroEdge Student Details		Certification File Details						
	Match Card	ID on File	Last Name	First Name	Birth Date	Case Number	DC Type	File Date
Automatic Match	<a href="#">View Details...</a>		ABSHIRE	LAUREN	02/06/2001	6011804462	SNAP	07/02/2018
Automatic Match	<a href="#">View Details...</a>		THOMPSON	KEEGEN	01/22/2008	6011804462	SNAP	07/02/2018

When the student is found, summary information from the upload file for the student is shown (under gold bar).

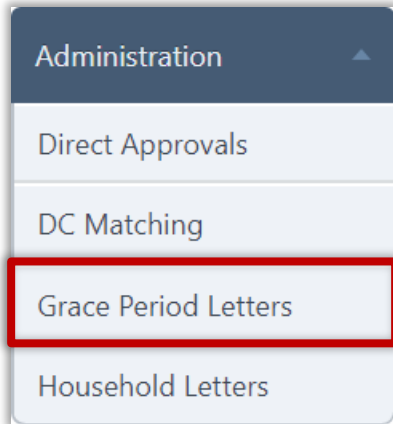


Click [View Details...](#) to review the various criteria used to make the match. Items shown in green that matched were assigned points. Points were added and evaluated against various threshold to determine the strength of the match.

GRACE			
Matching Criteria	Student Details	File Details	Points
SSN	000000000	120	0
Student ID	8755		0
Full Name	GRACE R	GRACE R	22
First and Last Name	GRACE	GRACE	0
Last and Middle Name	R	R	0
First and Middle Name	GRACE R	GRACE R	0
Last Name			0
First Name	GRACE	GRACE	0
DOB	04/09/2005	04/09/2005	14
Phonetic First Name	kRs	kRs	0
Phonetic Last Name	Ly	Ly	0
SOUNDEX First Name	G620	G620	0
SOUNDEX Last Name	B400	B400	0
Modified First Name (10 char)	GRACE	GRACE	0
Modified Last Name (10 char)			0
Name Twist Full Name	GRACE R	GRACE R	0
Name Twist First and Last Name	GRACE	GRACE	0
Variable DOB (±5 day(s))	04/09/2005	04/09/2005	0
DOB Month Year Twist	04/09/2005	04/09/2005	0
Street Address	RT. 1 BOX 315	RT. 1 BOX 315	10
Guardian	LARRY	LARRY	6
Phone 1	2747	2747	10
Phone 2	2748	2748	10
County Code(s)			12
<b>Total - 84 (Auto)</b>			

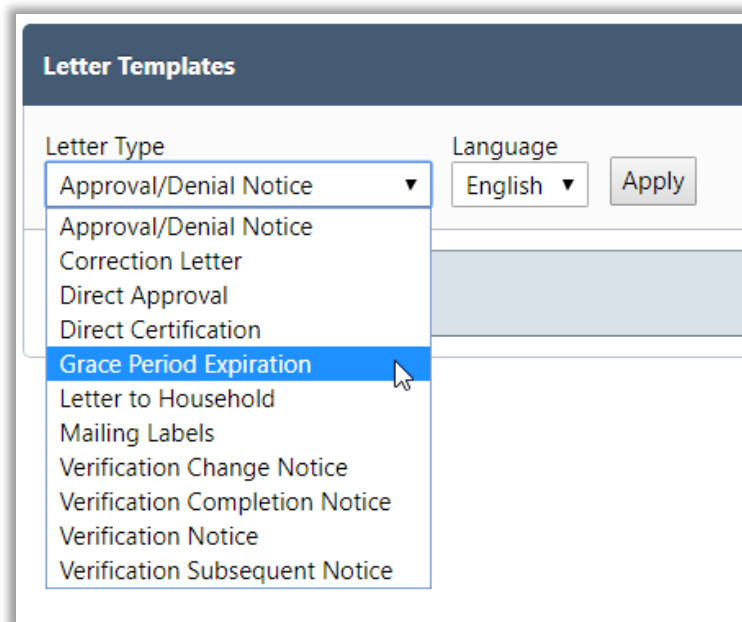
Close

## Grace Period Letters



**Grace Period Letters** notify families who have not reapplied that they are in danger of losing their meal benefits when the Grace Period ends. This action is not required, but may help gather more applications and reduce uncollectable bills.

The letter used for Grace Period letters uses the Grace Period Expiration letter template. This template is accessed through Letter Templates on the Configuration menu. The template should be modified to reflect your district's specific information. See page 221 for information on working with letter templates.



Grace Period letters are emailed or printed for:

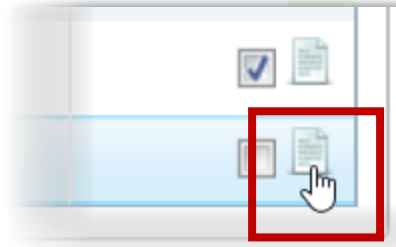
- An individual student.
- Selected students.
- All students.

## View Letters

An individual Grace Period letter can be viewed before printing.

### To view a Grace Period letter

1. Select search conditions and click **Apply**.
2. Click **View Letter** in a student listing.



The letter can be emailed or printed from the *Letter Viewer* window.

## Send Grace Period Letters

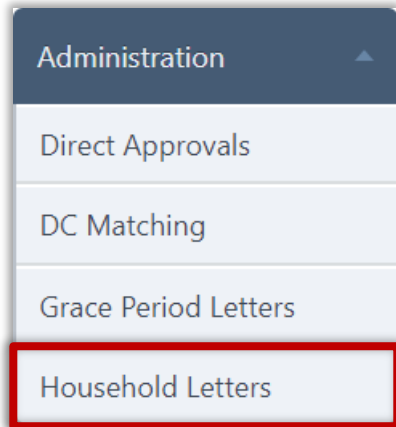
### To send Grace Period letters

1. Select search conditions and click **Apply**.
2. Do one of
  - \* Select individual student listings in the Email or Print columns and click **Notified Selected**.
  - \* Click **Notify All** to send letters to all students. All letters for students with email addresses on file will be emailed and all other letters will be printed.
3. Select a Notify Option and click **Notify**.

The screenshot displays the 'Grace Period Letters' application window. At the top, there are search filters for 'Site Code' (set to '-- ALL --'), 'Site' (set to '-- ALL --'), and 'Grade' (set to '-- ALL --'). There are 'Apply' and 'Reset' buttons. Below the filters is a table titled 'Grace Period Letters' with columns: Student ID, Last Name, First Name, Expiration Date, Type, Email, and Print. The table contains several rows of student data. A red box highlights the 'Notify Selected' and 'Notify All' buttons above the table. A 'Notify Options' dialog box is open in the foreground, showing three radio button options: 'Email/Print (6 Email - 117 Print - 123 Total)' (selected), 'Email Only (6)', and 'Print Only (123)'. A red box highlights the 'Notify' button in the dialog.

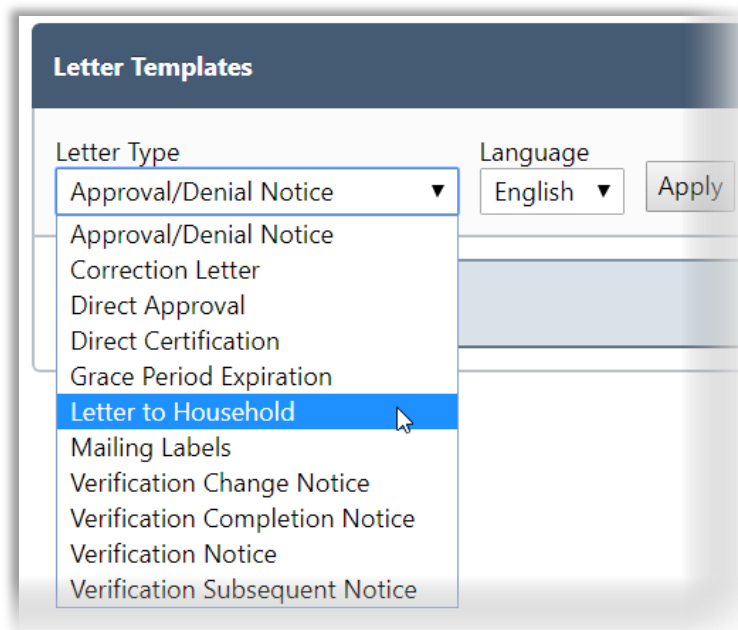
Student ID	Last Name	First Name	Expiration Date	Type	Email	Print
5470		CODY	07/31/2018	CEP TRANSFER	<input type="checkbox"/>	<input type="checkbox"/>
8092		KYLE	07/31/2018	CEP TRANSFER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6140		DALTON	07/31/2018	CEP TRANSFER	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7256		RYAN	07/31/2018	CEP TRANSFER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
88888					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
44444					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Household Letters



**Household Letters** accompanies applications to families. The information contained in this letter is the standard “Letter to Household” required to accompany the application with a few differences:

- Includes a grid to display student information for all students recognized as part of the household to help parents properly complete the application.
- Includes an address field of the parents of the youngest child in the household, using that student’s address.



The letter used for Household letters uses the Letter to Household letter template. This template is accessed through Letter Templates on the Configuration menu. The template should be modified to reflect your district’s specific information. See page 224 for information on working with letter templates.

Household Letters can be printed for

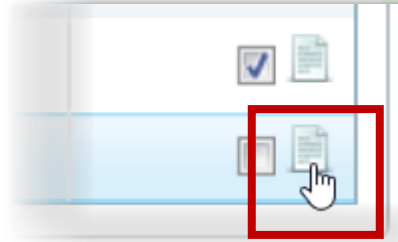
- An individual household.
- Selected households.
- All households.

## View Household Letter

An individual Household letter can be viewed before printing.

### To view Household letters

1. Select search conditions and click **Apply**.
2. Click **View Letter** in a student listing.



██████████ COUNTY SCHOOLS  
 Child Nutrition Department  
 School Year 2010-2011  
 Letter to Household

Printed : 02/01/2018

To the parents of  
 GREYDON ██████████  
 RR 2, BOX 295  
 ██████████

Dear Parent/Guardian:

Children need healthy meals to learn. ██████████ COUNTY SCHOOLS offers healthy meals every school day. Breakfast costs **[\$x.xx]** in Elementary Schools; **[\$x.xx]** in Secondary Schools. Lunch costs **[\$x.xx]** in Elementary Schools; **[\$x.xx]** in Secondary Schools. The reduced price is **[\$x.xx]** for breakfast and **[\$x.xx]** for lunch. **Your child(ren) may qualify for free or reduced-price meals if your household income falls within the limits on the Federal Income Chart.**

Child Name	Student ID	School Name	Grade
GREYDON ██████████	7392	ELEMENTARY SCHOOL	KG

- 1. Do I need to fill out an application for each child?** No. Complete the application to apply for free or reduced-price meals. Use one Free and Reduced-Price School Meals Application for all students in your household. We cannot approve an application that is not complete, so please be sure to fill out all required information. **Return the completed application to: [location or address].**
- 2. Who can get free meals?** Children in households getting Supplemental Nutrition Assistance Program (SNAP) benefits (formerly the Food Stamp Program) or TANF can get free meals regardless of your income. Your child(ren) can get free meals if your household income is within the free limits on the Federal Income Guidelines and you must complete this application and submit to your Child Nutrition Department. Head Start students and most foster children also qualify for free meals.
- 3. Should I fill out an application if I got a letter this school year saying my children are approved for free or reduced-price meals?** In most cases no, however, please read the letter you got carefully and follow all instructions. Call the Child Nutrition Department at **[Phone Number]** if you have any questions.
- 4. Can homeless, runaway and migrant children get free meals?** Yes. If you have not been notified of free status under these categories, please call **[Name of Liaison]** at **[Phone Number of Liaison]** to see if your child(ren) qualifies.
- 5. Who can get reduced price meals?** Your child(ren) can get low cost meals if your household income is within the reduced-price limits on the Federal Income Chart.
- 6. I get WIC. Can my child(ren) get free meals?** Children in households participating in WIC may be eligible for free or reduced-price meals. Please fill out an application.
- 7. Will the information I give be checked?** Yes, we may ask you to send written proof.
- 8. If I don't qualify now, may I apply later?** Yes. You may apply at any time during the school year if your household size goes up, income goes down, or if you start receiving SNAP, TANF or other benefits. If you lose your job your children may be able to get free or reduced-priced meals.
- 9. What if I disagree with the school's decision about my application?** You should talk to school officials. You also may ask for a hearing by calling or writing to ██████████, .

**Send Household Letter**

**To send Household Letters**

1. Select search conditions and click **Apply**.
2. Do one of
  - Select individual student listings and click **Notify Selected**.
  - Select “Select All” option and click **Notify Selected**.
  - Click **Notify All** to send letters to all households.

▲ Clear individual student listings to *not* send a household letter.
3. Click **Print** in the Windows Print popup.

The screenshot shows the 'Household Letters' application interface. At the top, there are dropdown menus for 'Site Code' and 'Site', both set to '-- ALL --'. Below these are 'Sort By' options: 'ZIP Code', 'School', and 'School and Grade' (selected). There is also an 'Include' section with checkboxes for 'Grace Period Students' and 'Students with no current eligibility', both checked. A 'Mailing Labels' checkbox is also present. An 'Apply' button is located below the filters.

The main area contains a table with the following columns: 'School Code', 'Student ID', 'Last Name', 'First Name', 'Email', and 'Print'. The table lists 11 students, all with '0103' as the school code. The 'Email' column has checkboxes, some of which are checked. The 'Print' column has checkboxes and document icons, all of which are checked.

At the bottom of the table, there are navigation controls (back, forward, page numbers 1-10, and a 'Page size' dropdown set to 10). A status bar at the bottom right indicates '12348 items in 1235 pages'.

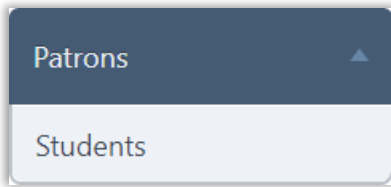


*« This page intentionally left blank »*





## Chapter 4: Patrons

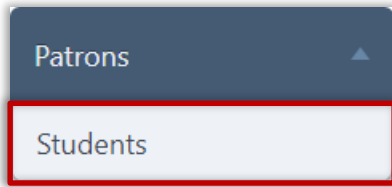


The **Patrons** menu (third menu in Student Eligibility module) includes one menu selection, Students. This selection provides all functions to manage student patron records.

In this chapter you will learn how to:

- View a student record.
  - Update data in a student record.
  - Change student's assigned eligibility on the Particulars tab.
  - View student demographic data and guardian information.
  - View and manage household member(s).
  - Upload or remove a student picture.
  - Add student notes.
  - Upload, view, and manage documents and images related to the student account.
  - Identify student allergens and add custom allergens.
  - Set A La Carte restrictions by day and number.
  - Add Special Instructions.
  - Set restricted Menu Items.
  - Set payment-type restrictions.
  - Review enrollment history.
  - View notification history.
- ▲ Modules, menus, and menu selections available to you correspond to your user role and the modules selected by your organization. Permissions to see and use certain functions are limited by each user's login and role.

Students



**Students** displays and manually updates student records in PrimeroEdge. The student record includes personal information, such as birth date, school, grade, etc. It also tracks the student’s eligibility status and eligibility history. Some information cannot be updated. Other information can be updated but will be overwritten with the next student file import.

View a Student Record

To view a student record

1. Choose one or more search conditions and click Apply.
2. Click a [Student ID](#) link in a student listing.

Student ID/SSN	Last Name	First Name	Site	Grade	Birth Date	Eligibility	Status	Balance
<a href="#">2168</a>		DEAR	ELEMENTARY SCHOOL	3	04/26/	111	Active	\$10.40
<a href="#">9324</a>		MATTHEW	ELEMENTARY SCHOOL	1	01/05/	111	Active	\$100.12
<a href="#">:6795</a>		ZACHARY	ELEMENTARY SCHOOL	3	11/13/	111	Active	\$0.12
<a href="#">0401</a>		ISAAC	ELEMENTARY SCHOOL	1	12/15/	111	Active	\$0.73
<a href="#">6489</a>		MADALYN	ELEMENTARY SCHOOL	3	03/25/	111	Active	\$0.36
<a href="#">8092</a>		KYLE	ELEMENTARY SCHOOL	2	01/30/	112	Active	\$0.11
<a href="#">:8677</a>		KADENCE	ELEMENTARY SCHOOL	2	06/22/	113	Active	\$0.62
<a href="#">:5470</a>		CODY	ELEMENTARY SCHOOL	1	08/31/	112	Active	\$0.84
<a href="#">6140</a>		DALTON	ELEMENTARY SCHOOL	3	05/24/	112	Active	\$0.00
<a href="#">1720</a>		BOCHEN	ELEMENTARY SCHOOL	3	09/06/	111	Active	\$0.12
<a href="#">0413</a>		LOMAN	ELEMENTARY SCHOOL	2	03/02/	113	Active	\$0.34

The **Student Details** page appears with nine tabs of information for the student. Some information can be updated while other information cannot be changed.

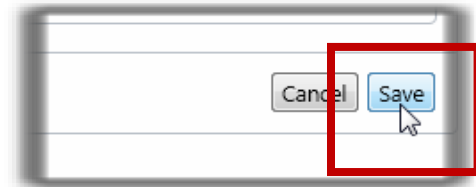
---

## Update Student Data

Some data can be changed manually, such as Eligibility on the Particulars tab. However, this data may be overwritten when data is imported from the Student Information System. Therefore, make changes to student data in the Student Information System, not in PrimeroEdge.

### To save changes

- With any tab on display, click **Save**.



**Tab 1: Particulars**

The **Particulars** tab lists basic student information, such as if the student is active in PrimeroEdge and provides current Eligibility information and account balance.

Student Details: DEAR - 2168

[Back to Students](#)

Particulars | Demographics | Household | Eligibility | Picture/Notes | Image/Documents | Allergies/Restrictions | Enrollment | Notifications

First Name: DEAR  
Last Name: [REDACTED]  
Middle Name: [REDACTED]  
SSN: [REDACTED] 2062  
Home Phone: [REDACTED] 2591  
Address: RR 1 BOX 215  
Apt: [REDACTED]  
City: [REDACTED]  
State: [REDACTED]  
Zip: [REDACTED]

Site: ELEMENTARY SCHOOL  
Grade: 3  
Homeroom: EE3

Student ID: [REDACTED] 168  
PIN: [REDACTED] 168  
State ID: [REDACTED]

**Eligibility** [Edit](#)

Eligibility	Reason	Expiration Date
Free	Import	7/31/2018

**Current Balance is \$10.40**

Account is active

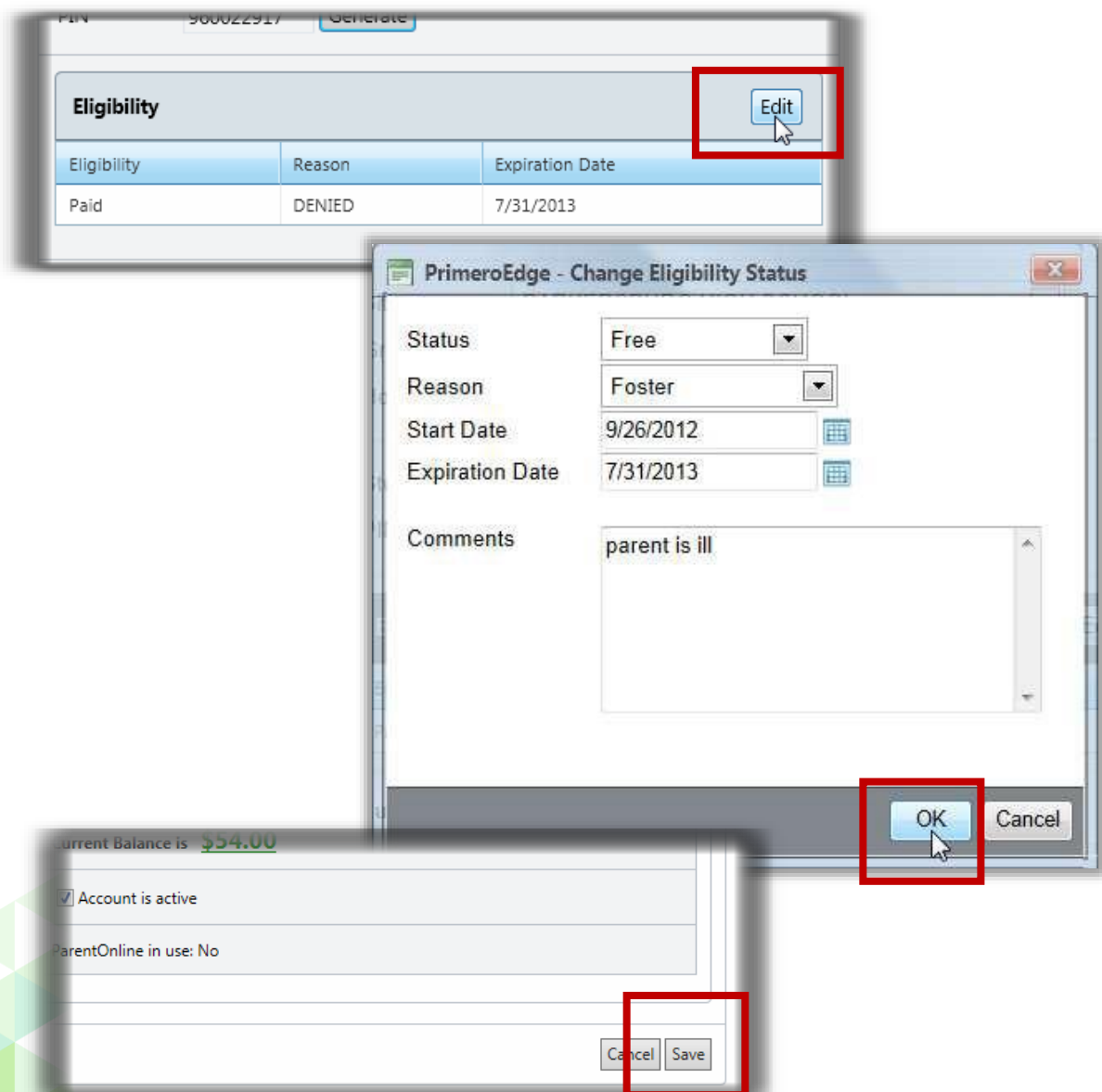
SchoolCafe in use: No

[Cancel](#) [Save](#)

### Change Eligibility

#### To manually change benefits eligibility

1. Click **Edit** in the Eligibility group.
2. Select a new Status or Reason as needed.
  - ▲ The available Reasons are dependent on the selected Status.
3. Select a benefits Start Date and an Expiration Date, if needed.
4. Enter Comments (required) and click **OK**.
5. Click **Save**.



**Tab 2: Demographics**

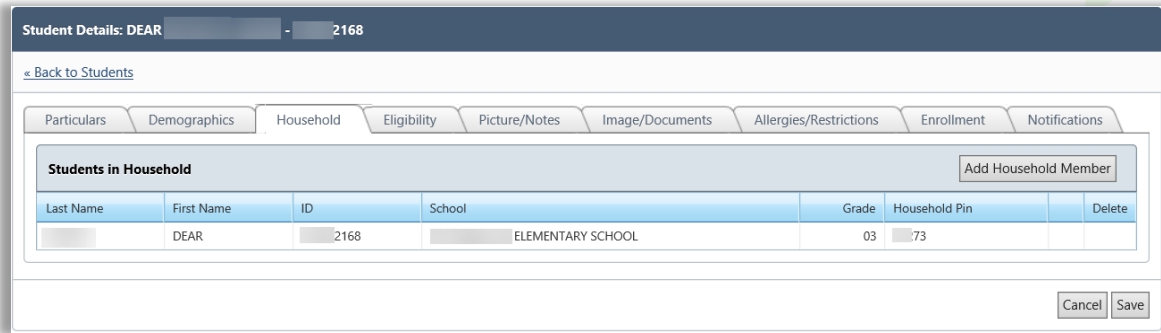
The **Demographics** tab lists demographic and Guardian information imported from the Student Information System.

The screenshot shows a web application interface for 'Student Details: DEAR'. The top navigation bar includes a 'Back to Students' link and several tabs: Particulars, Demographics (selected), Household, Eligibility, Picture/Notes, Image/Documents, Allergies/Restrictions, Enrollment, and Notifications. The Demographics section contains dropdown menus for Ethnicity (Other), Race (White), Gender (Female), and Language (English), along with a Birth Date field (4/26/1997). The Guardian Information section contains input fields for First Name (CAROLE), Last Name, Middle Name, SSN, Home Phone (2591), Work Phone (7811), and Email. At the bottom right, there are 'Cancel' and 'Save' buttons.

- ▲ This data may be overwritten when data is imported from the school’s Student Information System. Therefore, changes made to student data should be made in the Student Information System, not in PrimeroEdge.

**Tab 3: Household**

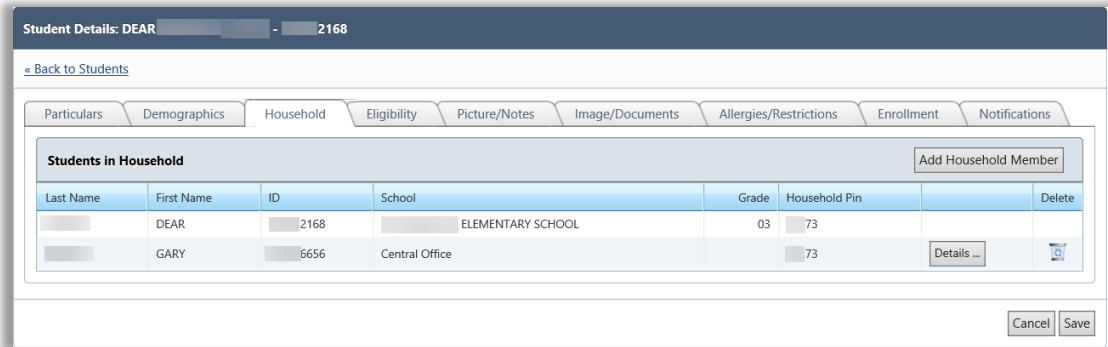
The Household tab displays all the students in the same household. Students are combined in a household when they are processed on an application together or have the same case number in the Direct Certification file.



▲ Student information on this tab cannot be updated or removed.

**To add a household member**

1. Click Add Household Member
2. Use Lookup to select a student to add.



**To remove an added household member**

- Click **Delete**.

**To view the added student's record**

- Click **Details**.

**Tab 4: Eligibility**

The **Eligibility** tab displays the student's benefits history.

- The most recent record is listed first.
- All students will have an original import record with **Status** of "Paid" and **Reason** of "Default".
- Any student without an application or other basis for Free or Reduced Status is given a Reason of "Default".
- For sibling DC approvals, the application number displays in the **Comments** column.

When Eligibility is changed through the Particulars tab, the application number is changed to "o" (zero). The application number (other than "o" [zero]) is a link that displays the application in the View Application popup.

No changes can be made to Eligibility information on this tab. However, Other Benefits can be updated.

Student Details: DEAR [redacted] - 2168

« Back to Students

Particulars Demographics Household Eligibility Picture/Notes Image/Documents Allergies/Restrictions Enrollment Notifications

**Eligibility**

Status	Start Date	End Date	Process Date	Reason	App/File #	Processed By	Comments
Free	11/15/2017	7/31/2018	11/14/2017	Import	1174	Cybersoft Support	Eligibility Import
Free	9/21/2017	11/14/2017	9/21/2017	Income	9212	Cybersoft Support	
Paid	7/7/2015	9/20/2017	7/7/2015	Default	1120	Cybersoft Support	
Paid	12/31/2014	7/6/2015	3/22/2010	Default	3222	Cybersoft Support	

\* Note: Italics indicates historical eligibility records that have been overwritten or not applied.

**Other Benefits**

Books

Cancel Save

**To add or remove Other Benefits**

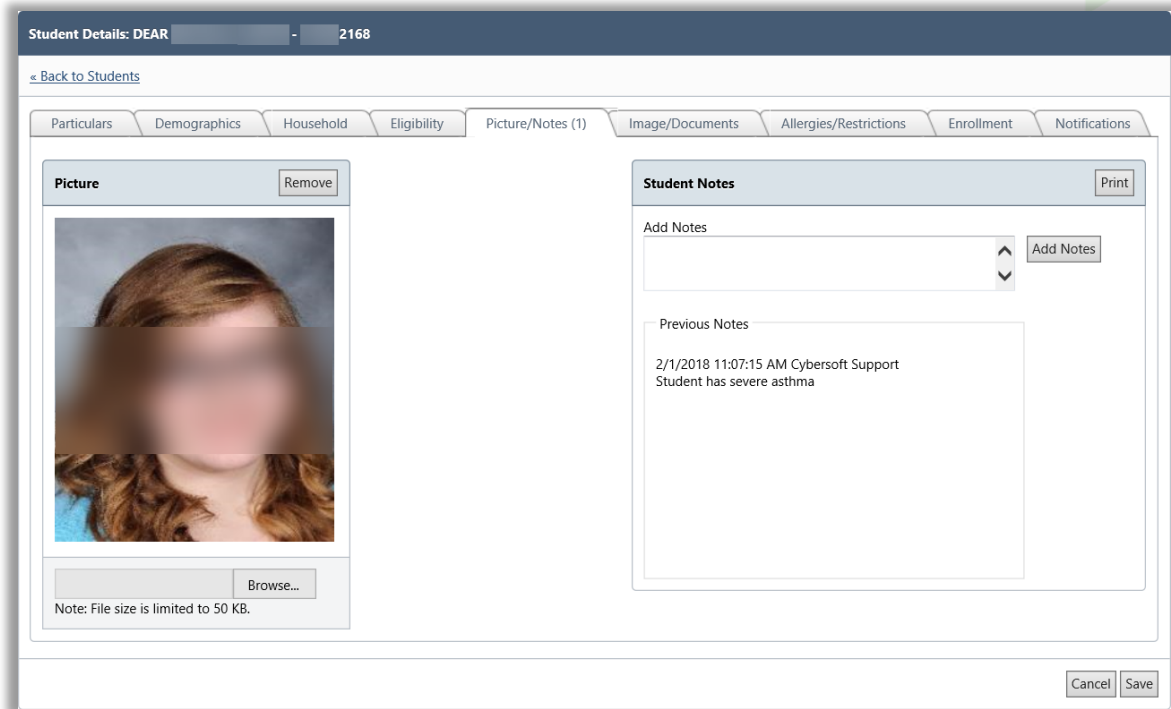
A SFA may configure Other Benefits to be available for selection on the eligibility application. The results of a parent or guardian's selection is shown on the Eligibility tab. These benefits may be edited in this section.

1. Select or unselect one or more benefits.
2. Click **Save**.



**Tab 5: Picture and Notes**

The Picture and Notes tab displays the student’s picture if it has been imported. Pictures must be 50KB or smaller.



**To add a picture**

1. Click **Browse**.
2. Select a picture file and click **Open**.
3. Click **Save**.

**To add student notes**

1. Enter text in Add Notes.
2. Click **Add Notes**.

**To remove a picture**

- Click **Remove**.

**To print student notes**

1. Click **Print**.
2. Click **Print** in the report viewer.

## Tab 6: Image/Documents Tab

The Image/Documents tab lists uploaded documents available for viewing or printing. Some documents cannot be viewed in the view window, but can be printed.

**Student Details: DEAR** - 2168

« Back to Students

Particulars Demographics Household Eligibility Picture/Notes (1) **Image/Documents** Allergies/Restrictions Enrollment Notifications

**Documents**

- Letter of Certification
- Court Order
- Letter of Denial
- Household Letter

Add Document

Upload File

Document Details

Description: Household Letter  
Date: 2/1/2018

**COUNTY SCHOOLS**  
Child Nutrition Department  
School Year 2010-2011  
Letter to Household  
Printed : 02/01/2018

To the parents of  
GREYDON  
RV 2, 808, 292

Dear Parent/Guardian:

Children need healthy meals to learn. COUNTY SCHOOLS offers healthy meals every school day. Breakfast costs \$5.00 in Elementary Schools, \$5.00 in Secondary Schools. Lunch costs \$5.00 in Elementary Schools, \$5.00 in Secondary Schools. The reduced price is \$3.00 for breakfast and \$3.00 for lunch. Your child(ren) may qualify for free or reduced price meals if your household income falls within the limits on the Federal Income Chart.

Child Name	Student ID	School Name	Grade
GREYDON	792	ELEMENTARY SCHOOL	NS

1. Do I need to fill out an application for each child? No. Complete the application to apply for free or reduced price meals. Use one Free and Reduced Price School Meals Application for all students in your household. We cannot process an application that is not complete, so please be sure to fill out all required information. Return the completed application to [location or address].

2. Who can get free meals? Children in households getting Supplemental Nutrition Assistance Program (SNAP) benefits (formerly the Food Stamp Program) or TANF can get free meals, regardless of your income. Your child(ren) can get free meals if your household income is within the free limits on the Federal Income Guidelines and you must complete this application and submit to your Child Nutrition Department. Head Start students and most foster children also qualify for free meals.

3. Should I fill out an application if I get a letter this school year saying my children are approved for free or reduced price meals? In most cases no. However, please read the letter you got carefully and follow all instructions. Call the Child Nutrition Department at [Phone Number] if you have any questions.

4. Can homeless, runaway and migrant children get free meals? Yes. If you have not been notified of free status under those categories, please call [Name of Liaison] at [Phone Number of Liaison] to see if your child(ren) qualifies.

5. Who can get reduced price meals? Your child(ren) can get free or reduced price meals if your household income is within the reduced price limits on the Federal Income Chart.

6. I got WIC. Can my child(ren) get free meals? Children in households participating in WIC may be eligible for free or reduced price meals. Please fill out an application.

7. Will the information I give be checked? Yes, we may ask you to send written proof.


8. If I don't qualify now, may I apply later? Yes. You may apply at any time during the school year if your household size goes up, income goes down, or if you start receiving SNAP, TANF or other benefits. If you lose your job your children may be able to get free or reduced price meals.

9. What if I disagree with the school's decision about my application? You should talk to school officials. You also may ask for a hearing by calling or writing to [ ] .

### To upload a file

1. Click **Upload File**.
2. Click **Select**, choose a file and click **Upload**
3. Add the document **Description**, click **OK**

### To remove a document

1. Click **Delete** (  ) in the document listing.
2. Click **OK**.

### To view an image file

1. Click a document name to display the image in the document viewer.
2. Use the scroll bars to view the image.

### To view a non-image file

1. Click a document name.
2. Click **Open** in the popup.

**Tab 7: Allergies and Restrictions**

The Allergies and Restrictions tab details POS Restrictions, including allergens, menu item restrictions, a la carte restrictions, other restrictions, and special instructions. The account can be flagged to not accept checks and to not accept charges.

Student Details: DEAR [redacted] - 2168

[Back to Students](#)

Particulars Demographics Household Eligibility Picture/Notes (1) Image/Documents Allergies/Restrictions Enrollment Notifications

**Allergens \*** Custom Allergens

Candy    Cookies    Crustacean Shellfish  
 Egg    Fish    Gluten  
 Milk    Ofe    Peanuts  
 Soy    Strawberry    Tree Nuts

**Menu Item Restrictions** Remove Add ...

Apple, Whole  
Basket, Burger  
Roll, Wheat

**Other Restrictions**

Do not accept checks on this account  
 No charges allowed  
 Reason: Payment Due

**Special Instructions**

student takes asthma meds

\*\*Enter up to four rows of 25 characters each.

**A La Carte Item Restrictions** Max Per Day 2

	Monday	Tuesday	Wednesday	Thursday	Friday
Cash Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Debit Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**\* Allergen Feature Disclaimer**

- The standard list of allergens available in the PrimoEdge "Allergen" feature is taken from the Food Allergen Labeling and Consumer Protection Act of 2004 (FALCPA) plus the addition of gluten. FALCPA allergens include: milk, egg, fish, crustacean shell fish, tree nuts, wheat, peanuts and soybeans.
- The PrimoEdge "Allergen" feature is a tool to help SFAs identify FALCPA allergens and gluten to aid in restricting POS menu item sales.
- PrimoEdge does NOT identify any allergens.
- The effectiveness of the PrimoEdge "Allergen" feature is dependent upon the data provided by authorized users within the system.
- No allergen information within PrimoEdge should ever be considered a guarantee or recommendation, but simply a best faith effort to serve our customers.
- PrimoEdge is not liable for inconsistent, incorrect, or missing allergen information.
- Custom Allergens may be added for district tracking needs. Custom Allergens may include sensitivities or religious preferences. Additionally, any Custom Allergens are not required by FALCPA to be listed on nutrition fact labels and the district assumes all liabilities for any unmarked or improper allergens.

Cancel Save

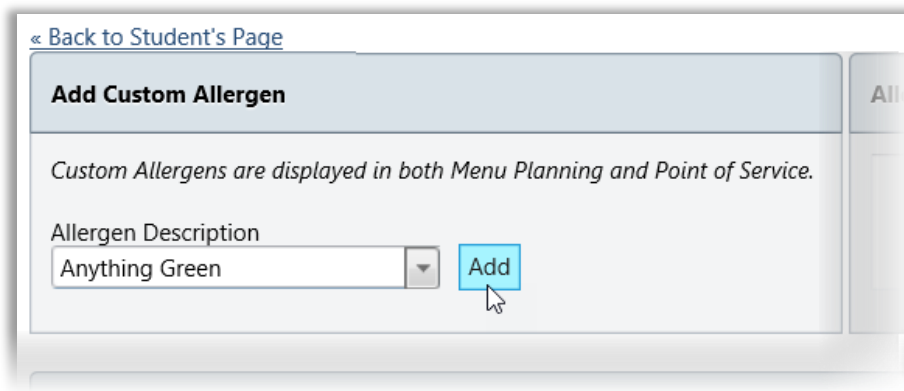
## Allergens

### To select Allergens

- Select one or more allergens.
- Click **Save**.

### To add a custom allergen

1. Click Custom Allergens.
2. Select the new custom allergen and click **Add**.
3. Click [Back to Student's Page](#) link.
4. Select the new allergen and click **Save**.



[< Back to Student's Page](#)

### Add Custom Allergen

Custom Allergens are displayed in both Menu Planning and Point of Service.

Allergen Description  
Anything Green

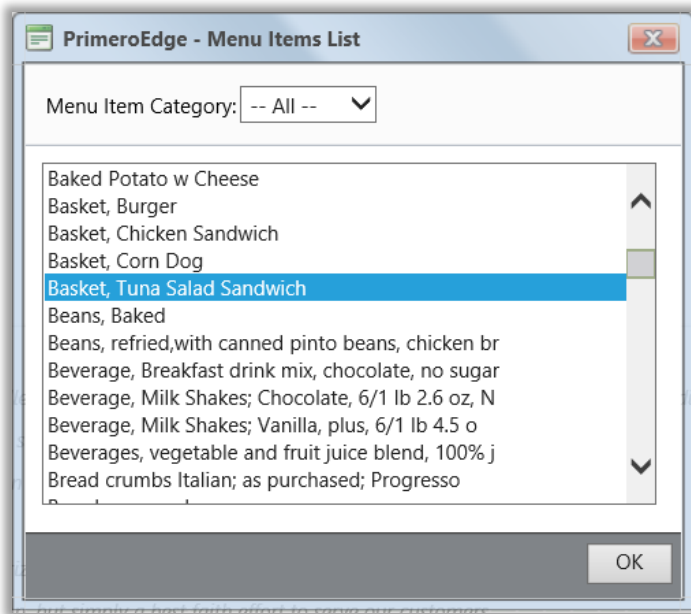
Add

### Menu Items

Menu Item restrictions are those Menu Items the student is not allowed to purchase under any circumstance

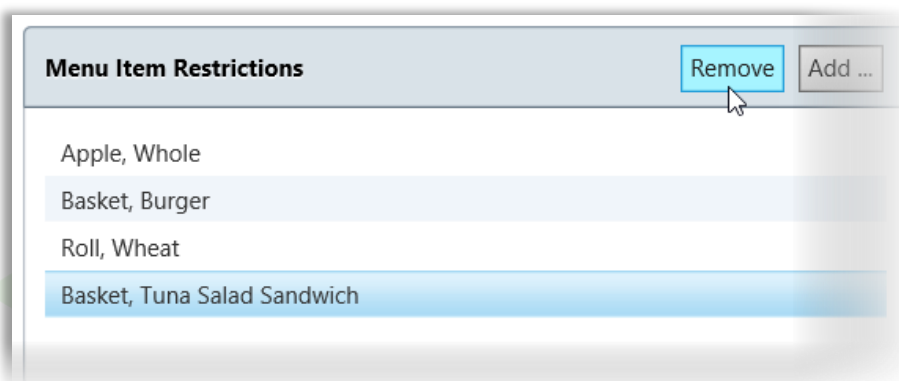
#### To add a Menu Item

1. Click **Add** in the Menu Items Restrictions group.
2. Select one or more items in the Menu Items List.
3. Click **OK**.



#### To remove a Menu Item

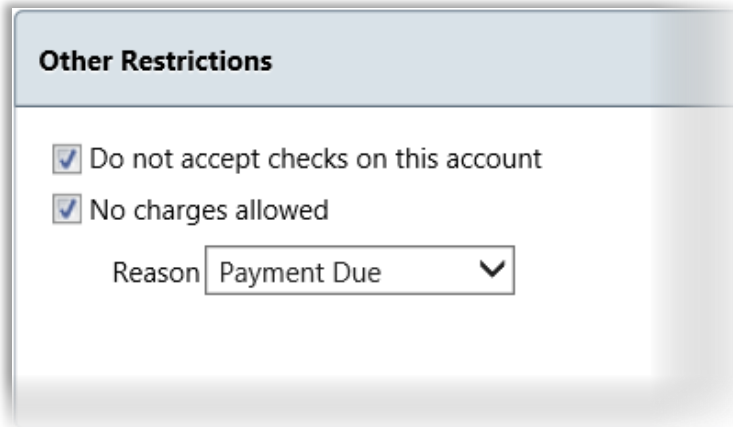
1. Select an item in the list.
2. Click **Remove**.



### Other Restrictions

#### To set Other Restrictions:

1. Select one or more options.
2. Select a Reason
3. Click **Save**.



**Other Restrictions**

Do not accept checks on this account

No charges allowed

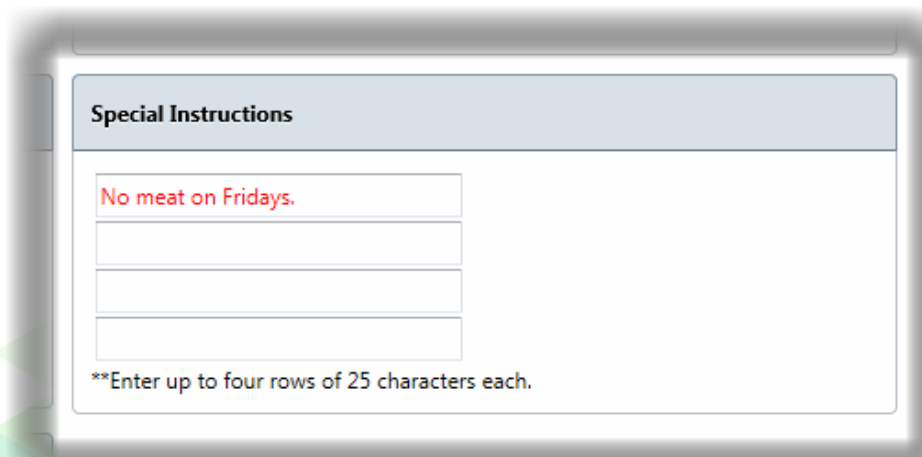
Reason

### Special Instructions

Special instructions are recorded for students that have certain medical issues, such as allergies, or when a parent requests specific restrictions for his student.

#### To include Special Instructions:

1. Click inside a row and enter text.
2. Click **Save**.



**Special Instructions**

\*\*Enter up to four rows of 25 characters each.

### A La Carte Restrictions

In the A La Carte Item Restrictions section:

1. Select one or more days the student cannot use cash or debit their account for a la carte items.
2. Enter the number of a la carte items the student can purchase each day.
3. Click **Save**.

A La Carte Item Restrictions		Max Per Day <input type="text"/>				
	Monday	Tuesday	Wednesday	Thursday	Friday	
Cash Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Debit Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Allergen Feature Disclaimer

### Tab 7: Enrollment History

The **Enrollment History** tab displays each school in your district in which the student has been enrolled. The most recent record is listed first.

Student history may not be complete. Information displayed on this page is a function of the user’s permissions.

School	Grade	Start Date	End Date	Activity Date
ELEMENTARY SCHOOL	03	09/21/2017	N/A	9/21/2017
ELEMENTARY SCHOOL	01	07/25/2017	09/20/2017	9/21/2017
MIDDLE SCHOOL	07	03/22/2010	07/24/2017	7/25/2017

Cancel Save

▲ No changes can be made on this tab.

## Tab 8: Notifications

Each notification sent to the student is listed on the Notifications tab. Details as to the date, method, and which module used to send the notification are included.

Letter Name	Module	Notification Method	User Name	Generated On	View
Approval/Denial Notice	Student Eligibility	Print	Cybersoft Support	10/18/2017 07:08 PM	
Approval/Denial Notice	Student Eligibility	Print	Cybersoft Support	10/18/2017 07:08 PM	
Reminder Letter (Single) - Student	Point of Service	Print	Cybersoft Support	08/08/2017 03:20 PM	
Reminder Letter (Single) - Student	Point of Service	Print	Cybersoft Support	08/08/2017 10:56 AM	
Approval/Denial Notice	Student Eligibility	Email	Cybersoft Support	08/01/2017 05:07 PM	
Approval/Denial Notice	Student Eligibility	Print	Cybersoft Support	08/01/2017 04:34 PM	
Approval/Denial Notice	Student Eligibility	Print	Cybersoft Support	08/01/2017 04:33 PM	
Approval/Denial Notice	Student Eligibility	Print	Cybersoft Support	07/25/2017 01:47 PM	
Approval/Denial Notice	Student Eligibility	Email	Cybersoft Support	07/25/2017 01:46 PM	
Approval/Denial Notice	Student Eligibility	Print	Cybersoft Support	07/25/2017 11:22 AM	

### To view a notification letter

- Click **View** in a notification listing.
- To print a notification letter previously sent, click **Reprint**.

**TENEMOS QUE REVISAR SU APLICACIÓN**  
COUNTY SCHOOLS

Batch: 186  
Aplicación: 2294  
Printed: 11/08/2017

Padres ó guardiàn de  
NOAH  
804 MASON ST

Estimado padre de familia ó guardiàn :

Su Aplicación para Comidas Escolares Gratis o de Precio Reducido ha sido seleccionada para ser verificada. Regulaciones Federales requieren que nosotros hagamos esto para asegurarnos que solamente niños elegibles obtengan comidas gratis o de precio reducido. Usted tiene que mandarnos información que prueba que el/los niño(s) arriba anotado son elegible.

**Mande uno de los siguientes:**

1. Prueba de que usted recibe SNAP o TANF para sus hijos. La sección 2 en la página 2 muestra que clase de comprobante debe mandar. Véa las secciones 1 y 3 para menores a cargo de servicios sociales.
2. Nombre y Número de Seguro Social de cada uno de los miembros adultos del hogar y prueba del ingreso actual de su hogar. La sección 3 en la página 2 muestra que clase de comprobante debe mandar.

Si es posible, mande copias y no documentos originales. Si usted manda los originales estos serán devueltos si usted nos lo pide.

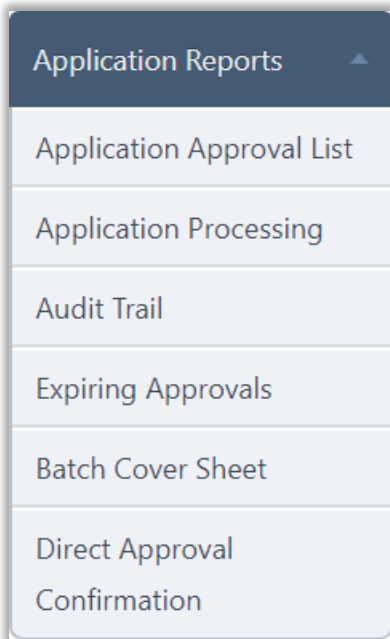
Usted tiene que mandar la información que necesitamos o contactar a antes de 11/18/2017, o sus hijos dejarán de recibir comidas gratis o de precio reducido.

**Mande la información a:**

« End of Chapter »



## Chapter 5: Application Reports



The **Application Reports** menu (fourth menu in Student Eligibility module) offers selections to generate a variety of reports that provide information about meal applications.

In this chapter, you will learn how to generate

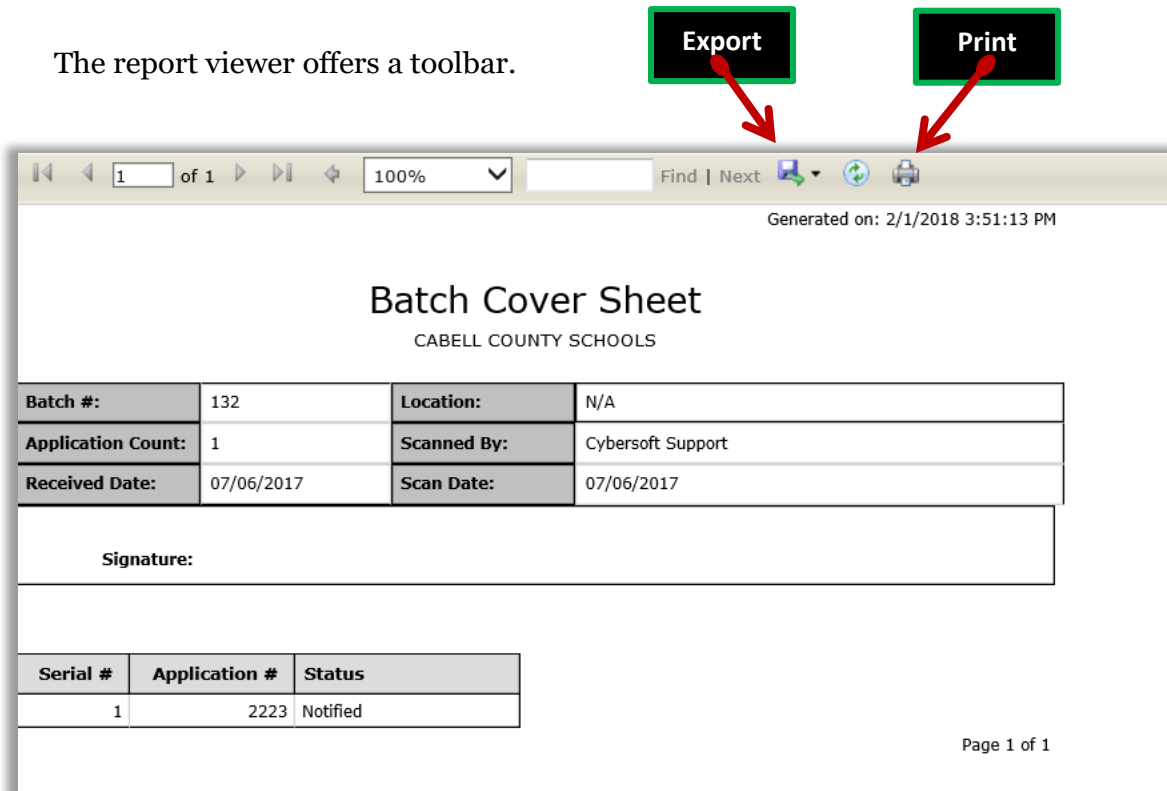
- Details for applications in a batch(es) (Application Approval List)
  - Summary of application stage in the application process and the length of time remaining to complete the application cycle (Application Processing—Application Cycle Timeline)
  - Details of the number of applications submitted by various entry methods based on the user who originally processed the applications or the status of the applications. (Application Processing—Application Processing)
- 
- Eligibility changes that occurred on a selected day and lists the reason for each change (Audit Trail)
  - All students whose Grace Period expires before the end of the Academic Year (Expiring Approvals)
  - Batch particulars including applications scanned in the batch. (Batch Cover Sheet)
  - Students designated as Direct Approval on an application and the confirmation status of that approval. (Direct Approval Confirmation)

## All Reports

All Application reports display in the report viewer when generated. The report viewer allows for printing the report as well as saving the report to a file in one of several formats.

- ▲ The report viewer a user will see depends on the brand of browser used. Internet Explorer will contain the export and print options. All non-Internet Explorer browsers will generate PDF reports and contain a print option only.

The report viewer offers a toolbar.



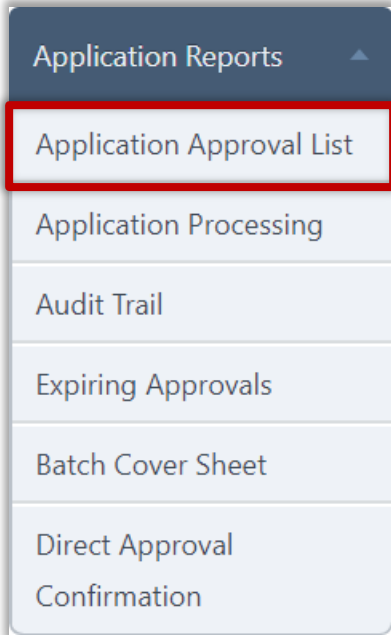
### To export to a file

1. Click **Export**.
2. Select a file type.
3. Click **Open** to display the exported file.

### To print a report

1. Click **Print**.
2. In the Windows Print popup, click **Print**.

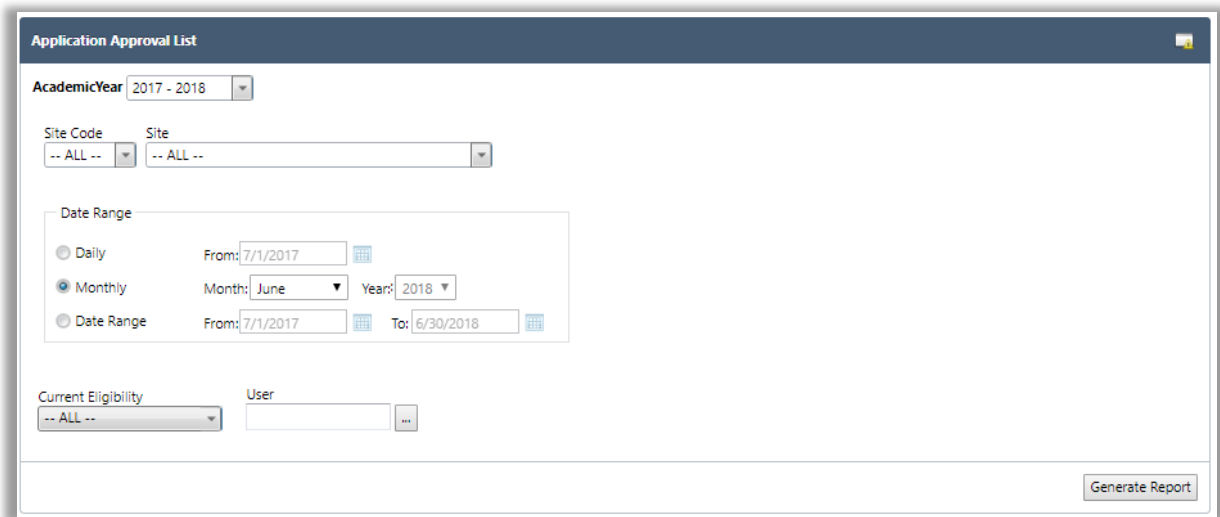
### Application Approval List



The Application Approval List details the applications processed on the selected date. This report should be run at the end of every processing day so that the Determining Official can authorize the entire list. Signing this one list is in lieu of initialing or signing every application by hand.

#### To display an Application Approval List

1. Select a location.
2. Select a Date(s).
3. Select an Eligibility and User, if needed.
4. Click **Generate Report**.



**Application Approval List**

Site Type: All  
Date: 07/01/2017 - 06/30/2018

Generated 02/01/2018 02:13:08 PM by Cybersoft Support  
Current Eligibility: -- ALL --  
User: -- All --

Batch	Application	Amount	Frequency	Size	SNAP/TANF	Current Eligibility	Basis
<b>Determining Official: █████ Director</b>							
138	2232	\$0.00	Y	2		Free	Income
171	2274	\$2,122.00	M	2		Reduced	Income
<b>Determining Official: Cybersoft Support</b>							
132	2223	\$0.00	Y	1		Free	Income
133	2224	\$0.00	Y	2		Free	Income
133	2225	\$0.00	Y	1		Free	Income
133	2226	\$0.00	Y	1		Free	Income
134	2227	\$0.00	Y	1		Free	Income
134	2228	\$0.00	Y	1		Free	Income
134	2229	\$2,350.00	M	2		Reduced	Income
136	2230	\$2,222.00	M	2		Reduced	Income

**Application Approval List**

Site Type: All  
Date: 07/01/2017 - 06/30/2018

Generated 02/01/2018 02:13:08 PM by Cybersoft Support  
Current Eligibility: -- ALL --  
User: -- All --

Batch	Application	Amount	Frequency	Size	SNAP/TANF	Current Eligibility	Basis
250	2349	\$0.00	Y	1		Free	Income
251	2350	\$500.00	E	2		Free	Income
252	2351	\$0.00	Y	1		Free	Income
253	2352	\$0.00	Y	1		Free	Income
259	2363	\$1,537.50	M	3		Free	Income

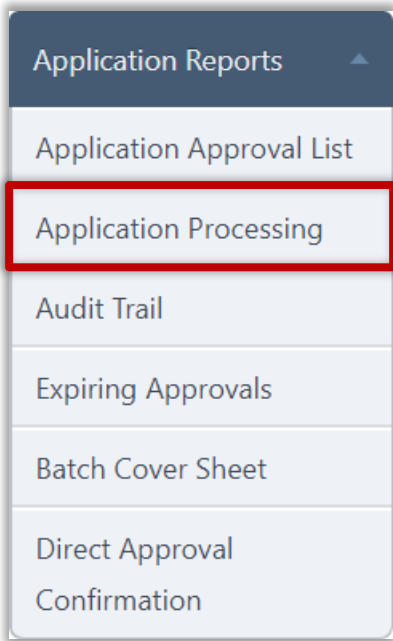
Reviewing Official's Signature: ..... Date : .....

Confirming Official's Signature: ..... Date : .....

Follow-up Official's Signature: ..... Date : .....

\* Indicates the application was reprocessed after the date for which the report was generated.

## Application Processing



**Application Processing** produces the Application Cycle Timeline report and the Application Processing report.

The Application Cycle Timeline report provides a summary including the number of applications at various stages in the application process and the length of time remaining to complete the application cycle.

The Application Processing report details the number of applications submitted by various entry methods based on the user who originally processed the applications or the status of the applications. The report can be generated for a selected date, month, or date range.

**To generate an Application Cycle Timeline report**

1. Select Application Cycle Timeline.
2. Select a Date(s).
3. Click **Generate Report**.

**Application Processing**

**Academic Year** 2017 - 2018 ▼

Report

Application Cycle Timeline     Application Processing

Date Range

Daily      From: 2/1/2018

Monthly      Month: July ▼    Year: 2017 ▼

Date Range      From: 7/1/2017    To: 6/30/2018

Generate Report

Generated 2/1/2018 2:17:32 PM by Cybersoft Support

## Application Cycle Timeline

Days to Complete Application Cycle					
			Near Deadline		Total
	1 - 3 Days	4 - 7 Days	8 - 10 Days	11+ Days	
Processed	5	0	0	0	5
Pending	0	0	0	0	0
Not Processed	0	0	0	0	0
<b>Grand Total</b>					<b>5</b>

Applications Near Deadline (Not Processed)				
Batch #	App #	Received Date	Status	Method
<i>Report Selections</i>				
Academic Year: 2017 - 2018				
Date Range: 7/1/2017-6/30/2018				
Powered by PrimoEdge for: COUNTY SCHOOLS				

Page 1 of 1

**To generate an Application Processing report**

1. Select Application Processing
2. Select a Date(s).
3. Click **Generate Report**.

**Application Processing**

**Academic Year** 2017 - 2018 ▼

Report

Application Cycle Timeline     Application Processing

Date Range

Daily      From: 2/1/2018 📅

Monthly      Month: July ▼    Year: 2017 ▼

Date Range      From: 7/1/2017 📅    To: 6/30/2018 📅

Generate Report

Generated 2/1/2018 2:24:36 PM by Cybersoft Support

### Application Processing

All Applications	Entry Method				
All Users	Online	Manual	Scanned	Import	Total
Received	0	130	1	10	141
Deleted	0	1	0	0	1
Processed	0	128	1	0	129
Pending	0	0	0	0	0
Not Processed	0	0	0	10	10
Processed Applications	Entry Method				
User Name	Online	Manual	Scanned	Import	Total
Gopinath A	0	7	0	0	7
Cybersoft Support	0	93	1	0	94
Cabel Director	0	28	0	0	28
<b>Total Applications</b>	<b>0</b>	<b>128</b>	<b>1</b>	<b>0</b>	<b>129</b>

**Report Selections**  
 Academic Year: 2017 - 2018  
 Date Range: 7/1/2017-6/30/2018  
 Powered by PrimeroEdge for: █████ COUNTY SCHOOLS

Page 1 of 1

Audit Trail

- Application Reports ▲
- Application Approval List
- Application Processing
- Audit Trail
- Expiring Approvals
- Batch Cover Sheet
- Direct Approval Confirmation

**Audit Trail** lists all eligibility changes that occurred on a selected day and lists the reason for each change.

**To generate an Audit Trail report**

1. Select a site.
2. Select a Date.
3. Click **Generate Report**.

**Audit Trail**

Area:  Site Code:  Site:

Date:

Generated on: 4/15/2018 11:05:54 PM

**Audit Trail**

ISD

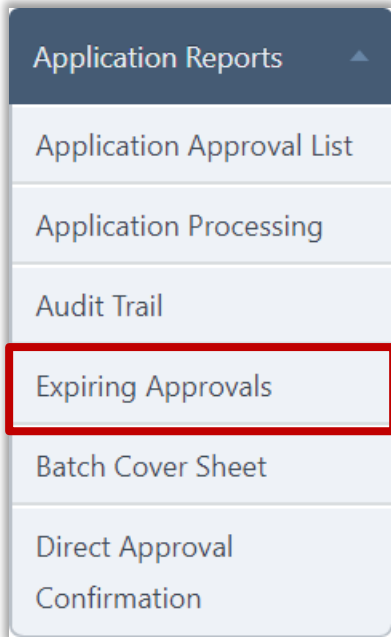
Processed Date: 9/5/2017

ID	Name	School Name	Grade	Eligibility			Reason	Application No
				From	To	Start Date		
06	Lillian A	Early Learning Center	KG	Paid	Free	9/5/2017	INCOME	1546
74	Donovan A	Elementary	3	Reduced	Free	9/5/2017	CATEGORICAL	1547
75	Evan D	Elementary	4	Reduced	Free	9/5/2017	CATEGORICAL	1547
73	John W	Early Learning Center	PK		Paid	9/5/2017	DEFAULT	0
74	Piper K	High School	10		Paid	9/5/2017	DEFAULT	0
75	Irene B	Early Learning Center	KG		Paid	9/5/2017	DEFAULT	0
76	Reyvan K	Early Learning Center	PK		Free	9/5/2017	INCOME	1544
99	Robert G	Junior School	6	Free	Free	9/5/2017	CATEGORICAL	1544
24	Marisol G	Elementary	3	Free	Free	9/5/2017	MIGRANT	0
94	Hector	High School	12	Free	Free	9/5/2017	DCTANF	0
93	Victoria B	High School	10	Free	Free	9/5/2017	DCTANF	0
38	Jaren L	High School	12	Paid	Free	9/5/2017	HOMELESS	0
151	Esteban J	Junior School	8	Free	Free	9/5/2017	INCOME	1548
146	Emmanuel A	Elementary	2	Free	Free	9/5/2017	INCOME	1548
77	Gavin J	Elementary	4	Free	Free	9/5/2017	INCOME	1549

Page : 1 of 1



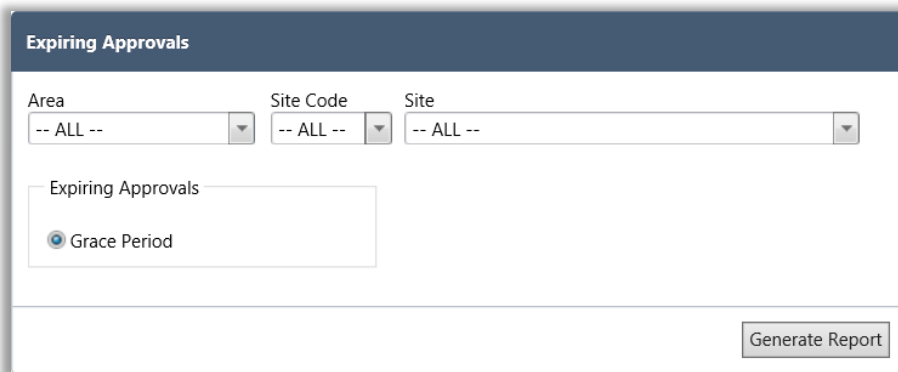
Expiring Approvals



**Expiring Approvals** lists all students whose Grace Period expires before the end of the Academic Year.

To generate students with expiring approvals

1. Select a site.
2. Click **Generate Report**.



A screenshot of a web browser window showing a report titled 'Expiring Approvals' for '2010 - 2011'. The report type is 'Grace Period' and it was printed on 2/2/2011. The table below lists student information and approval details.

Name	Student ID	Expiring Date	Eligibility	Processed Date	Start Reason	Application #
WILLIAMS, ANDREW	110000001	11/7/2010	Free	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000002	11/7/2010	Free	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000003	11/7/2010	Free	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000004	11/18/2010	Free	11/17/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000005	11/7/2010	Reduced	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000006	11/7/2010	Reduced	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000007	11/7/2010	Reduced	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000008	11/7/2010	Free	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000009	11/7/2010	Free	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000010	11/7/2010	Free	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000011	11/7/2010	Free	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000012	11/7/2010	Free	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000013	11/7/2010	Free	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000014	11/7/2010	Free	7/12/2010	GRACEPERIOD	0
WILLIAMS, ANDREW	110000015	11/7/2010	Free	7/12/2010	GRACEPERIOD	0

Batch Cover Sheet

- Application Reports ▲
- Application Approval List
- Application Processing
- Audit Trail
- Expiring Approvals
- Batch Cover Sheet
- Direct Approval
- Confirmation

**Batch Cover Sheet** provides batch particulars and lists applications scanned in the batch. This report can also be printed after scanning a batch. This function allows the user to re-print the Batch Cover Sheet.

**To generate and print a Batch Cover Sheet**

1. Select an Academic Year and a Batch #.
2. Click **Generate Report**.

**Batch Cover Sheet**

Academic Year: 2012 - 2013 ▼    Batch #: 760 ▼

[Generate Report](#)

Generated on: 2/1/2018 3:36:26 PM

## Batch Cover Sheet

COUNTY SCHOOLS

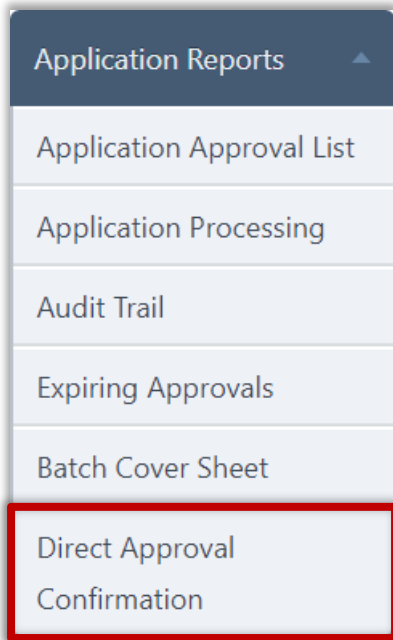
<b>Batch #:</b>	133	<b>Location:</b>	N/A
<b>Application Count:</b>	3	<b>Scanned By:</b>	Cybersoft Support
<b>Received Date:</b>	07/07/2017	<b>Scan Date:</b>	07/07/2017

**Signature:**

Serial #	Application #	Status
1	2224	Notified
2	2225	Notified
3	2226	Notified

Page 1 of 1

Direct Approval Confirmation



**Direct Approval Confirmation** generates a list of students who have been designated as Direct Approval on an application, along with the confirmation status of that approval.

This is helpful to determine which application Direct Approvals still need to be confirmed.

**To generate a Direct Approval Confirmation**

1. Select a Confirmation Status and Approval Type.
2. Select a Date Range.
3. Click **Generate Report**.

The screenshot shows the 'Direct Approval Confirmation' form. It includes two dropdown menus for 'Confirmation Status' and 'Approval Type', both currently set to '-- ALL --'. Below these is a 'Date Range' section with three radio button options: 'Daily' (selected), 'Monthly', and 'Date Range'. The 'Daily' option has a 'From' field set to '2/1/2018'. The 'Monthly' option has 'Month' set to 'February' and 'Year' set to '2018'. The 'Date Range' option has 'From' set to '2/1/2018' and 'To' set to '2/1/2018'. A 'Generate Report' button is located at the bottom right of the form.

Generated 9/27/2017 11:53:04 AM by Cybersoft Support

**Direct Approval Confirmation Report**  
WINTHROP USE  
 08/01/2017 - 09/27/2017

Student ID	Name	App #	Batch #	DA Type	Confirmation Status	Process Date	User Name
00004959	JONES, SHON LYNN	4482	1877	Head Start	App Status - Not Confirmed	8/3/2017	Thomas Wilson
00004958	JONES, SHON ANTHONY	4610	1919	Head Start	App Status - Not Confirmed	8/15/2017	Thomas Wilson
00004966	ZIVALLA, MICHAEL	4723	1950	Head Start	DA Status - Not Confirmed	8/18/2017	Thomas Wilson
00004965	BLISS, SANDY DAWN	4625	1923	Homeless	App Status - Not Confirmed	8/18/2017	Thomas Wilson

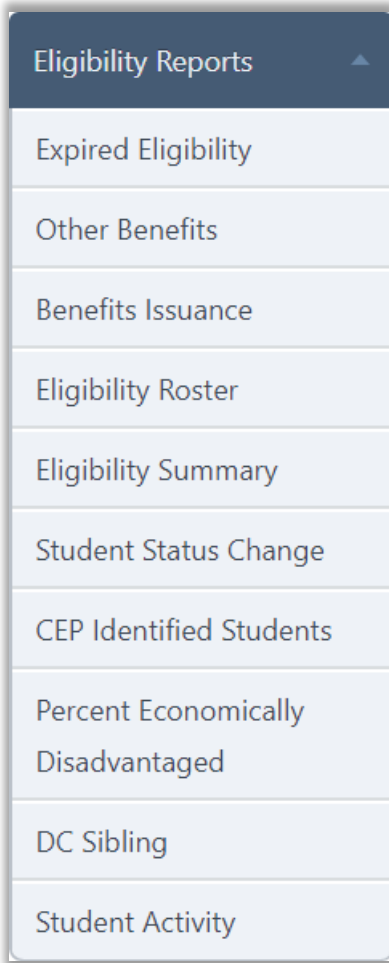
Powered by PrimoEdge for: WINTHROP USE Page : 1 of 1



*« This page intentionally left blank »*



## Chapter 6: Eligibility Reports

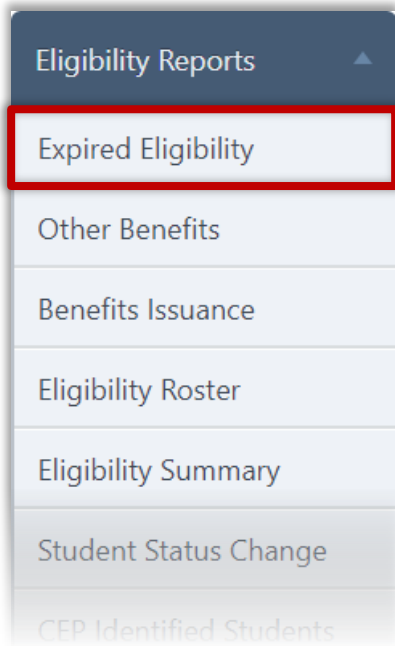


The **Eligibility Reports** menu (fifth menu in Student Eligibility module) offers selections to generate reports providing both summary and detailed information for eligibility determinations.

In this chapter, you will learn how to generate the following reports

- List students whose meal eligibility has lapsed (Expired Eligibility)
- List students who requested more information regarding benefits offered by the district (Other Benefits)
- Detail eligibility determinations for a date range for a selected school. (Benefits Issuance)
- List students with selected eligibility category and eligibility reason (Eligibility Roster)
- List student count for each Eligibility category by school(s) on a selected date (Eligibility Summary)
- List students whose eligibility changed within a selected date range (Student Status Change)
- List identified CEP students by site (CEP Identified Students)
- List percentage of students identified as eligible for Free or Reduced-Price meals (Percent Economically Disadvantaged)
- List Direct Certification students that have a possible sibling match (DC Sibling)
- List new, transferred, and withdrawn students (Student Activity)

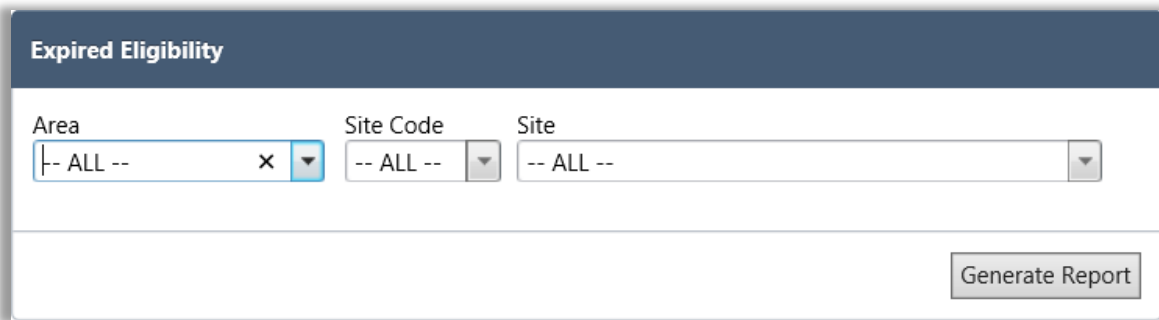
## Expired Eligibility



**Expired Eligibility** lists all students whose meal eligibility has lapsed. Data is grouped by site, sorted by student name.

### To generate Expired Eligibility report

1. Select a location.
2. Click **Generate Report**.



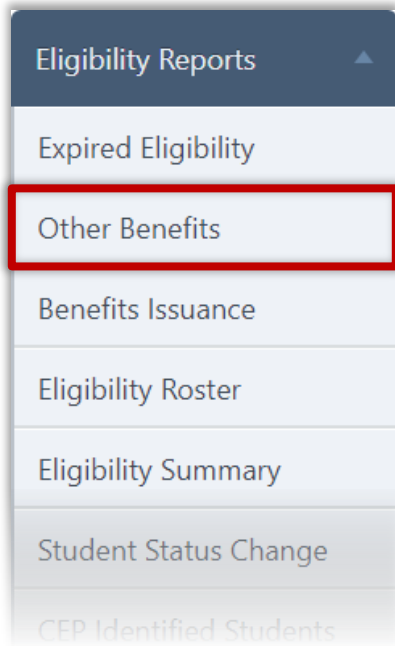
Generated on: 2/1/2018 4:12:24 PM

### Expired Eligibility

████████ COUNTY SCHOOLS

Student ID	Student Name	Grade	Previous SY Eligibility	Previous SY Reason
<b>Area: ██████████ COUNTY SCHOOLS</b>				
<b>Site: ██████████ ELEMENTARY SCHOOL</b>				
████████ 3933	████████, LAURYN		Reduced	DC Medicaid
████████ 8435	████████, AMANDA		Reduced	DC Medicaid
████████ 9631	████████, MATTHEW	KG	Free	DC Unmatched
████████ 4836	████████, BROOKLYN	PK		
████████ 2190	████████, HUNTER	KG	Reduced	DC Medicaid
████████ 5957	████████, BREANN	4	Reduced	DC Medicaid
████████ 5189	████████, BRIDGET	5	Reduced	DC Unmatched
████████ 2715	████████, RILEY	KG	Free	DC SNAP
████████ 2715	████████, RILEY	KG	Free	DC TANF
<b>Site: ██████████ ELEMENTARY SCHOOL</b>				
████████ 3957	████████, HANNAH	5	Free	DC Medicaid
████████ 4778	████████, LOGAN	PK	Free	DC SNAP
████████ 3564	████████, AUBREY	5	Free	DC TANF
████████ 1695	████████, DELANEY	1	Free	DC TANF
████████ 2754	████████, HANNAH	KG	Free	Even Start
████████ 9051	████████, ISABELLA	2	Free	Head Start
████████ 4209	████████, JENNIFER	5	Free	Homeless
████████ 0169	████████, KADYN	1	Free	Migrant
████████ 9725	████████, LIAM	2	Free	Principal Approved
████████ 6906	████████, ROGER	3	Free	Runaway
████████ 5432	████████, TRISTAN	4	Reduced	Income
████████ 9726	████████, WILLIAM	2	Reduced	Transfer
████████ 2412	████████, JOHN	1		

Other Benefits



**Other Benefits** lists all students whose household requested more information regarding benefits offered by the district during the eligibility application process.

Request for information was made during the completion of a Free & Reduced Meals application on the district’s Free & Reduced Meals Online Applications web site.

Other benefits are presented to the user on the **Review Application** page of the Free & Reduced Meals Online Applications web program. This is the last page presented before the user finalizes the application.

**To generate Other Benefits report**

1. Select search criteria as needed.
2. Click **Generate Report**.

The 'Other Benefits' form contains several input fields and checkboxes. At the top, there are three dropdown menus for 'Area', 'Site Code', and 'Site', all set to '-- ALL --'. Below these are four more dropdown menus: 'Academic Year' (2017 - 2018), 'Program' (SNP), 'Recipient Agency Code' (empty), and 'Benefits' (--All--). There are three sections of checkboxes: 'Eligibility' with 'Free', 'Reduced', and 'Paid' checked; 'Share' with 'Yes', 'No', and 'Not Applicable' checked; and 'Options' with 'Include Guardian Info' unchecked. A 'Generate Report' button is located at the bottom right of the form.



Report Results

**Other Benefits**  
 COUNTY SCHOOLS  
 Academic Year: 2017 - 2018

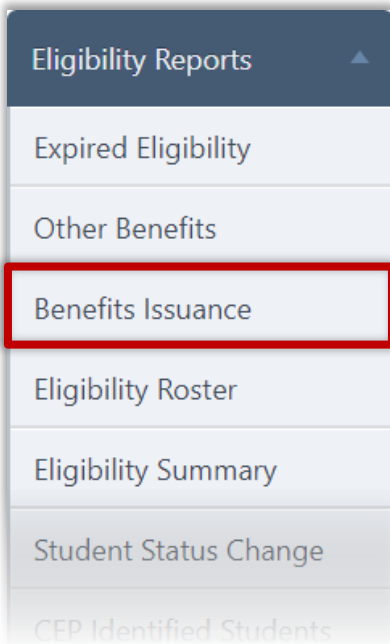
Generated on: 4/15/2018 11:15:57 PM  
 Area: All  
 Site: All

Student Info								
Student ID	Student Name	Site	Grade	Eligibility	App #	Benefits	Share	Birth Date
Area: COUNTY SCHOOLS								
305	SHANNON MARIE	HIGH SCHOOL	12	Paid	2223	- Band Uniform Rental	N/A	04/07/1993
305	SHANNON MARIE	HIGH SCHOOL	12	Paid	2333	- Band Uniform Rental	N/A	04/07/1993
456	KAYLA A.	MIDDLE SCHOOL	7	Free	2232	- Band Uniform Rental	N/A	05/15/1997
925	ASHLEY NICOLE	MIDDLE SCHOOL	7	Free	2297	- Fee Waiver	N/A	01/16/1998
786	DAWN CIERRA	MIDDLE SCHOOL		Free	2246	- Year Book	N/A	05/29/1999
786	DAWN CIERRA	MIDDLE SCHOOL		Free	2333	- Year Book	N/A	05/29/1999
786	DAWN CIERRA	MIDDLE SCHOOL		Free	2352	- Year Book	N/A	05/29/1999
442	CATHERINE DAWN	MIDDLE SCHOOL	7	Free	2351	- Band Uniform Rental	N/A	02/14/1997
910	BRUCE DELMER	MIDDLE SCHOOL	8	Reduced	2247	- Band Uniform Rental	N/A	11/15/1995
947	COLE RILEY	MIDDLE SCHOOL	7	Free	2337	- Year Book	N/A	04/23/1997
	Benefit, Other	ELEMENTARY SCHOOL	4	Free	2302	- Year Book	N/A	10/01/2016

**Report Selections:**  
 Eligibility: Free, Reduced, Paid  
 Can Share Information: Yes, No, Not Applicable  
 Benefits: All  
 Include Guardian Info: No

Page: 1 of 1

## Benefits Issuance



**Benefits Issuance** details all assigned eligibility determinations for a date or date range for a selected school. All students are included, even if there were no changes.

This report is a combination of the Status Change and Student Activity reports.

### To generate a Benefits Issuance report

1. Select a location.
2. Select a Date Range.
3. Click **Generate Report**.

A screenshot of the 'Benefits Issuance' report generation interface. It features a dark blue header with the title 'Benefits Issuance'. Below the header, there are two dropdown menus for 'Site Code' and 'Site', both set to '-- ALL --'. A 'Date Range' section contains three radio button options: 'Daily' (selected), 'Monthly', and 'Date Range'. The 'Daily' option has a 'From' field with the date '7/1/2011' and a calendar icon. The 'Monthly' option has 'Month' and 'Year' dropdown menus set to 'July' and '2011' respectively. The 'Date Range' option has 'From' and 'To' fields, both with the date '7/1/2011' and calendar icons. A 'Generate Report' button is located at the bottom right of the form.

Report Results

Generated on: 4/15/2018 11:20:06 PM

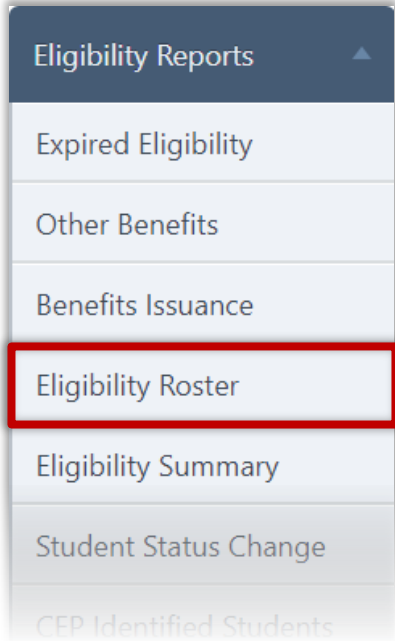
### Benefits Issuance Document

ISD  
From 9/1/2017 To 9/1/2017

Student ID	Student Name	Grade	Eligibility	Effective Date	End Date	Reason
<b>Site: High School</b>						
247	Joseph	10	Free	8/4/2017	09/10/2017	DCTANF
				8/3/2017		Returned to district
857	Samantha	11	Paid	7/1/2017	06/30/2018	DEFAULT
				8/3/2017		Returned to district
038	Gage	12	Paid	7/1/2017	06/30/2018	DEFAULT
				8/3/2017		Returned to district
897	Sebastian	11	Paid	7/1/2017	06/30/2018	DEFAULT
				8/3/2017		Returned to district
517	Alexandra	10	Paid	7/1/2017	06/30/2018	DEFAULT
				8/3/2017		Returned to district
184	Caleigh	10	Paid	7/1/2017	06/30/2018	DEFAULT
				8/3/2017		Returned to district
275	Mariam	12	Reduced	8/29/2017	06/30/2018	INCOME
				8/3/2017		Returned to district
943	Destiny	10	Free	7/1/2017	09/30/2017	GRACEPERIOD
				8/3/2017		Returned to district
1463	Dylan	11	Paid	7/1/2017	06/30/2018	DEFAULT
				8/3/2017		Returned to district
910	Isalah	9	Free	8/26/2017	06/30/2018	INCOME
				9/1/2017	11/06/2017	Withdrawn from district
1333	Marcelo	9	Reduced	7/1/2017	09/10/2017	GRACEPERIOD
				8/3/2017		Returned to district
338	Marc	9	Paid	7/1/2017	06/30/2018	DEFAULT
				8/3/2017		Returned to district
343	Sakeef	11	Paid	7/1/2017	06/30/2018	DEFAULT
				9/1/2017		Returned to district
524	Kayla	12	Paid	7/1/2017	06/30/2018	DEFAULT

Page: 1 of 317

Eligibility Roster



**Eligibility Roster** lists students with selected eligibility category and eligibility reason.

**To generate an Eligibility Roster report**

1. Select a location, Grade, and Date.
2. Select Eligibility, Reason, Options, and Include options, as needed.
3. Click **Generate Report**.

The 'Eligibility Roster' report generation interface includes the following fields and options:

- Area:** -- ALL --
- Site Code:** -- ALL --
- Site:** -- ALL --
- Grade:** --ALL--
- As of Date:** 2/1/2018
- Eligibility:**
  - Free
  - Reduced
  - Paid
- Options:**
  - Display Eligibility Code
  - Display Contact Info
  - Sort by Grade
  - Only Verification Sites
  - Only Non-CEP Sites
- Reason:**
  - Uncheck All
  - Categorical
  - DC Transfer
  - DC FDPIR
  - DC Foster
  - DC Medicaid
  - DC SNAP
  - DC TANF
  - DC Unmatched
  - Default
  - Denied
  - Even Start
  - Foster
  - Grace Period
  - Head Start
  - Homeless
  - Import
  - Income
  - Migrant
  - Pre-Approval
  - Principal Approved
  - RCCI
  - Refused Benefits
  - Removed
  - Runaway
  - Transfer
  - Verification
- Include:**
  - Inactive Students
  - Inactive Sites
- Generate Report** button

Generated on: 2/1/2018 4:47:29 PM

### Eligibility Roster

COUNTY SCHOOLS  
As of 2/1/2018

ID	Name	Grade	Birth Date	Eligibility	Reason	App #	Batch #	Case #	Start Date	End Date
Area: COUNTY SCHOOLS										
Site: ELEMENTARY SCHOOL										
0786	, CIERRA DAWN		5/29/	111	Income	2352	253		1/8/2018	6/30/2018
3933	, LAURYN RAIN		9/24/	113	Default				7/1/2017	6/30/2018
8435	, AMANDA KEELY		7/29/	113	Default				7/1/2017	6/30/2018
9506	, BROOKELYN P.	KG	10/17/	112	Income	2315	210		10/1/2017	6/30/2018
1784	, CORTNEY MADISON	4	2/19/	111	Income	2348	249		1/2/2018	6/30/2018
8226	, EMMA	1	2/2/	112	Verification	2237	147		11/3/2017	6/30/2018
9631	, MATTHEW JAMES	KG	5/9/	113	Default				7/1/2017	6/30/2018
4512	, SKYLAR CAINE	KG	8/7/	111	Income	2349	250		1/2/2018	6/30/2018
4836	, BROOKLYN RENEE	PK	8/1/	113	Default				7/1/2017	6/30/2018
2290	, KAYLA NICOLE	4	10/2/	113	Default				7/1/2017	6/30/2018
2303	, KYLA BROOKE	4	10/2/	113	Default				7/1/2017	6/30/2018
5417	, JORDAN	4	5/13/	113	Default				7/1/2017	6/30/2018
6341	, OWEN ALEXANDER	4	11/13/	113	Default				7/1/2017	6/30/2018
4453	, MARIA E	PK	5/4/	113	Default				7/1/2017	6/30/2018
0	, HUNTER L	KG	8/18/	113	Default				7/1/2017	6/30/2018
9	, TARIQ HAKIM	4	8/4/	113	Default				7/1/2017	6/30/2018
2847	, CAMERON BLAKE	2	8/23/	113	Default				7/1/2017	6/30/2018
2212	, TANER RAY	4	6/13/	113	Default				7/1/2017	6/30/2018
3117	, TYLAN M.	PK	10/4/	113	Default				7/1/2017	6/30/2018

Generated on: 2/1/2018 4:47:29 PM

First Page

### Eligibility Roster

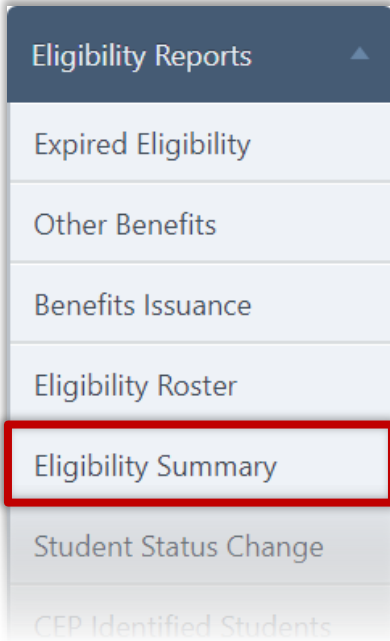
COUNTY SCHOOLS  
As of 2/1/2018

Eligibility	Count	Reason	Count
Free	88	Categorical	0
Reduced	36	CEP Transfer	3
Paid	12,692	DC FDPPIR	1
<b>Total:</b>	<b>12,816</b>	DC Foster	1
		DC Medicaid	3
		DC SNAP	7
		DC TANF	14
		DC Unmatched	5
		Default	12,677
		Denied	6
		Even Start	0
		Foster	0
		Grace Period	0
		Head Start	0
		Homeless	0
		Import	0
		Income	76
		Migrant	1
		Pre-Approval	0
		Principal Approved	0
		RCCI	0
		Refused Benefits	0
		Removed	0
		Runaway	0
		Transfer	0
		Verification	22
<b>Total:</b>	<b>12,816</b>		

Last Page

Page: 323 of 323

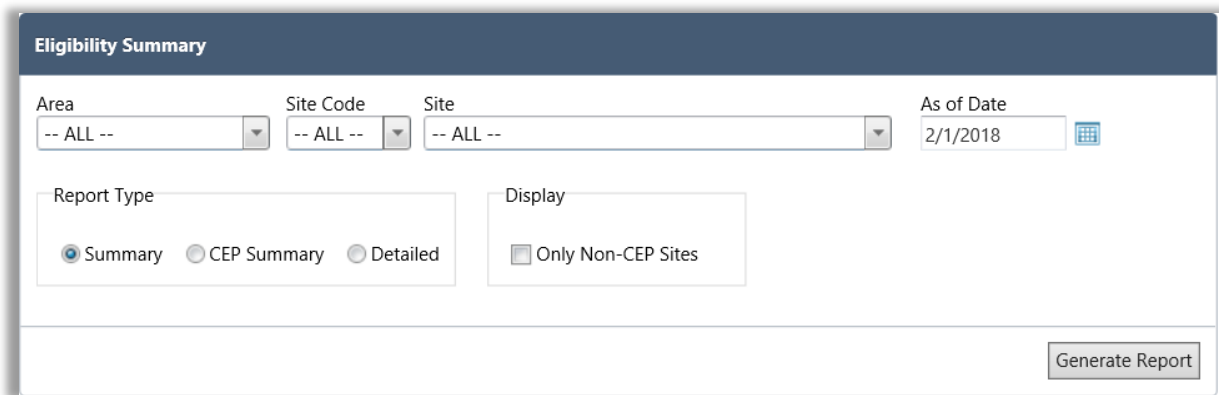
## Eligibility Summary



**Eligibility Summary** lists the count of students in each Eligibility category for the selected school(s) on a selected date. This report also offers a combined percent economically disadvantaged, the number of students who are DC, and the number of students that were denied.

**To generate an Eligibility Summary report:**

1. Select a location and As Of Date.
2. Select Report Type and Display options, as needed.
3. Click **Generate Report**.



Report Results

Student Eligibility

COUNTY SCHOOLS

Generated on: 2/1/2018 5:08:19 PM
Area: All
Site: All

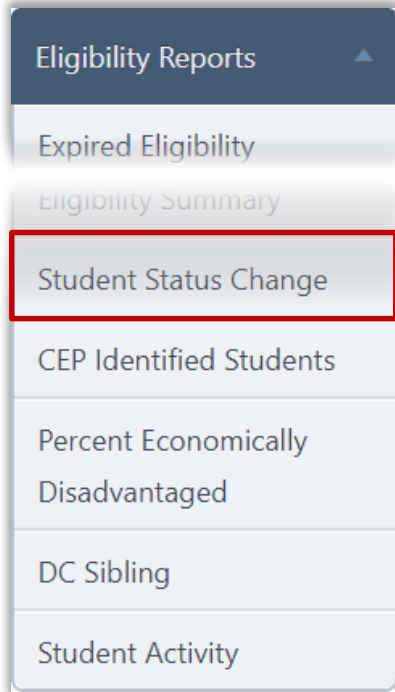
As of: 2/1/2018

Table with columns: Site, Free (DC, Direct Approvals, Income, etc.), Reduced (DCMA, Income, etc.), Paid (No App, Denied, etc.), Total, % Free, % Red, % Paid, % Eco Dis. Includes sub-totals for North Area, South Area, and Grand Total.

Powered by PrimeroEdge for: COUNTY SCHOOLS

Page : 1 of 2

## Student Status Change

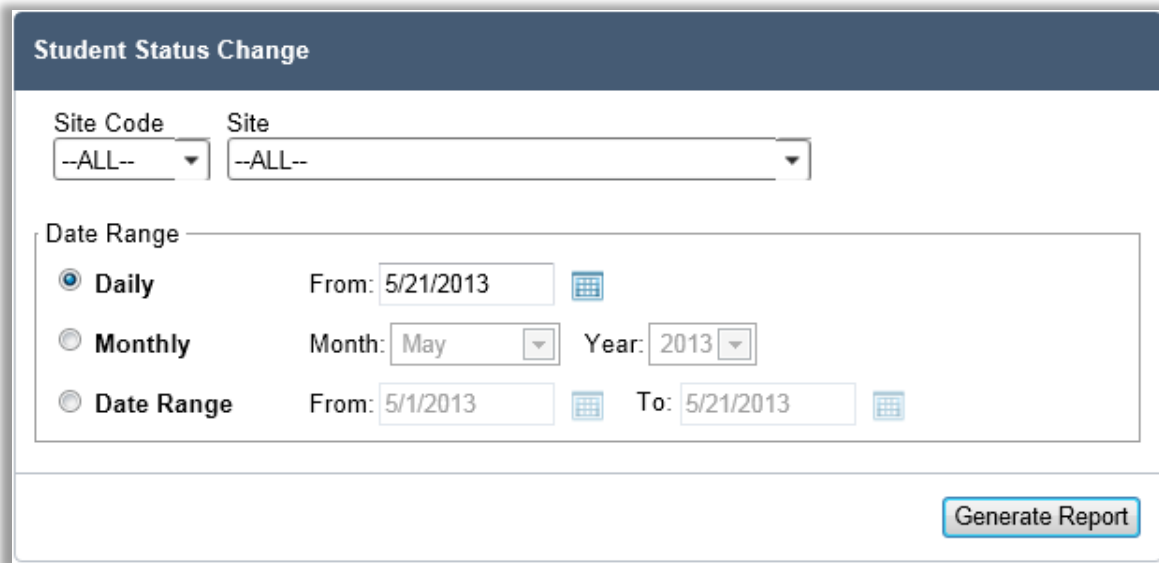


A vertical menu titled 'Eligibility Reports' with a small upward-pointing triangle. The menu items are: 'Expired Eligibility', 'Eligibility Summary', 'Student Status Change' (highlighted with a red border), 'CEP Identified Students', 'Percent Economically Disadvantaged', 'DC Sibling', and 'Student Activity'.

**Student Status Change** lists all students whose eligibility changed within a selected date range. The report details the change (From / To) and the reason for the change.

### To generate a Student Status Change report

1. Select a location
2. Select a Date Range, as needed.
3. Click **Generate Report**.



The 'Student Status Change' form contains the following fields and options:

- Site Code:** A dropdown menu with '--ALL--' selected.
- Site:** A dropdown menu with '--ALL--' selected.
- Date Range:** A section with three radio button options:
  - Daily:** Selected. Includes a 'From:' field with '5/21/2013' and a calendar icon.
  - Monthly:** Includes a 'Month:' dropdown with 'May' selected and a 'Year:' dropdown with '2013' selected.
  - Date Range:** Includes 'From:' and 'To:' fields, both with '5/1/2013' and '5/21/2013' respectively, and calendar icons.
- Generate Report:** A blue button located at the bottom right of the form.



Report Results

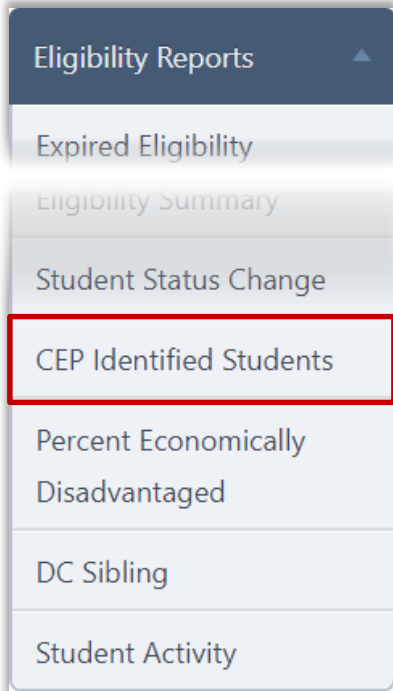
Generated on: 2/1/2018 5:18:23 PM

### Status Change Report

COUNTY SCHOOLS  
From 2/1/2017 To 2/1/2018

ID	Name	Grade	Eligibility			Reason
			From	To	Effective Date	
COUNTY SCHOOLS						
COUNTY SCHOOLS						
001 Central Office						
5443	, ASHLEY	10	Paid	Free	1/31/2018	DCTANF
3448	, ADAM WESLEY	12	Paid	Free	10/3/2017	INCOME
ELEMENTARY SCHOOL						
0095	, MICHAELA E	1	Paid	Reduced	10/29/2017	INCOME
8226	, EMMA	1	Free	Reduced	11/3/2017	VERIFICATION
1797	, KADANCE ELIZABETH	1	Paid	Free	9/20/2017	DCMA
8388	, HAYDEN JAMES	3	Paid	Free	10/29/2017	INCOME
8715	, ALEXIA ROSE	3	Paid	Reduced	10/29/2017	INCOME
8634	, KALEB ALEN	3	Paid	Reduced	10/29/2017	INCOME
5957	, BREANN NICOLE	4	Reduced	Paid	7/1/2017	DEFAULT
5957	, BREANN NICOLE	4	Paid	Reduced	5/4/2017	DCMA
5957	, BREANN NICOLE	4	Reduced	Reduced	7/1/2017	GRACEPERIOD
6424	, ZACHARY TYLER	4	Paid	Reduced	10/29/2017	INCOME
1784	, CORTNEY MADISON	4	Paid	Free	1/2/2018	INCOME
5189	, BRIDGET MARIE	5	Reduced	Paid	7/1/2017	DEFAULT
5189	, BRIDGET MARIE	5	Paid	Reduced	5/4/2017	DCUNMATCHED
5189	, BRIDGET MARIE	5	Reduced	Reduced	7/1/2017	GRACEPERIOD
5531	, HUNTER LAINE	5	Paid	Free	10/29/2017	INCOME
4968	, SKYLAR NOEL	5	Paid	Reduced	10/29/2017	INCOME
2715	, RILEY NICOLE	KG	Paid	Free	5/4/2017	DCTANF
2715	, RILEY NICOLE	KG	Free	Free	7/1/2017	GRACEPERIOD
2715	, RILEY NICOLE	KG	Free	Paid	7/1/2017	DEFAULT
9506	, BROOKELYN P.	KG	Paid	Reduced	10/1/2017	INCOME

## CEP Identified Students



**CEP Identified Students** generates a list of identified CEP students by site.

### To generate a CEP Identified Students report

1. Select a location
2. Select a Date Range, as needed.
3. Click **Generate Report**.

A screenshot of the 'CEP Identified Students' report generation interface. It features a dark blue header with the title 'CEP Identified Students'. Below the header are three dropdown menus: 'Academic Year' (set to '2017 - 2018'), 'Site Code' (set to '-- ALL --'), and 'Site' (set to '-- ALL --'). There is an 'As of Date' field with a calendar icon, set to '2/1/2018'. Below these fields is an 'Options' section with two radio buttons: 'Summary' and 'Detailed' (which is selected). A 'Generate Report' button is located in the bottom right corner of the form.

### Report Results

Generated on: 2/1/2018 5:26:22 PM by Cybersoft Support

#### CEP Identified Students

School District Name: COUNTY SCHOOLS  
Date: 2/1/2018  
Academic Year: 2017 - 2018

Agency Code	State ID	Student ID	Last Name	First Name	Middle Name	Site Number	Site Name	Match Date	Effective Date	Approval Type	Sibling Information
033	50	8875	JACOB	MICHAEL		0103	ELEMENTARY SCHOOL		09/21/2017	DC SNAP	

Powered by PrimoEdge for: COUNTY SCHOOLS Page: 1 of 2

Generated on: 2/1/2018 5:26:22 PM by Cybersoft Support

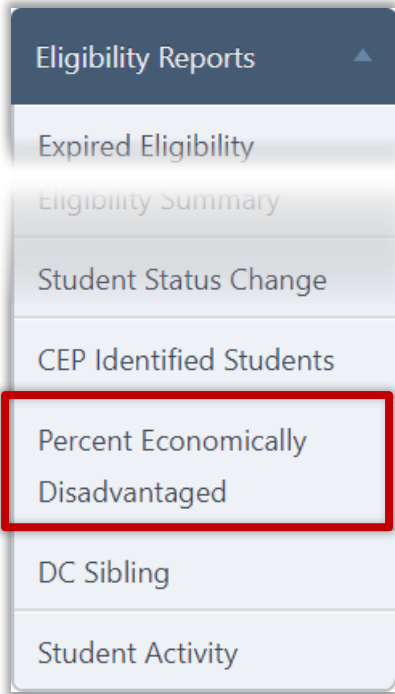
#### CEP Identified Students

School District Name: COUNTY SCHOOLS  
Date: 2/1/2018  
Academic Year: 2017 - 2018

Site Name	DC SNAP
ELEMENTARY SCHOOL	1
<b>Total</b>	<b>1</b>

Note: 1. Summary will only display sites and approval types that have counts.  
2. Blank Match Date indicates the students eligibility was changed via the Students>>Particulars>>Eligibility Edit button.

## Percent Economically Disadvantaged



**Percent Economically Disadvantaged** lists the percentage of students identified as eligible for Free or Reduced Price meals in the total school population for each school. Counts are also provided for total Enrollment and for each Free and Reduced Price eligibilities.

### To generate a Percent Economically Disadvantaged report

1. Select a location.
2. Select As of Date.
3. Click **Generate Report**.



Report Results

Generated on: 2/1/2018 5:34:18 PM

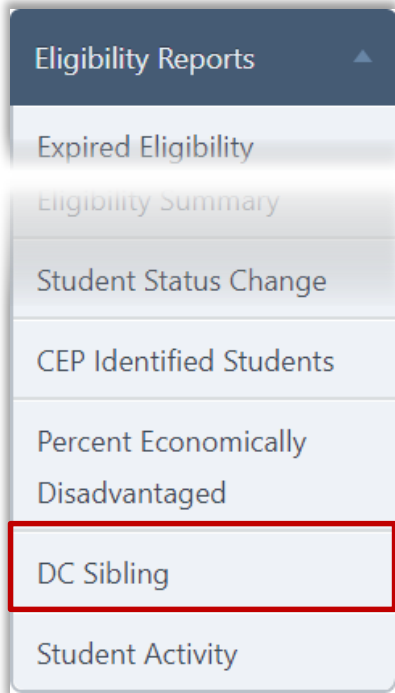
### Percent Economically Disadvantaged

As of 2/1/2018  
Area: None  
Site: All

Site Code	Site	Free	Reduced	Enrollment	Total F/R	Total F/R %
<b>COUNTY SCHOOLS</b>						
0102	ELEMENTARY SCHOOL	2	2	4	4	100.00
0103	ELEMENTARY SCHOOL	10	4	22	14	63.64
0231	ELEMENTARY SCHOOL	0	1	2	1	50.00
0208	ELEMENTARY SCHOOL	1	0	1	1	100.00
0502	HIGH SCHOOL	1	0	1	1	100.00
0503	HIGH SCHOOL	0	1	1	1	100.00
0210	ELEMENTARY SCHOOL	0	0	1	0	0.00
0304	MIDDLE SCHOOL	0	1	1	1	100.00
0309	MIDDLE SCHOOL	1	0	1	1	100.00
0233	INTERMEDIATE SCHOOL	0	1	2	1	50.00
0232	PRIMARY SCHOOL	0	0	1	0	0.00
0506	HIGH SCHOOL	0	1	5	1	20.00
0234	ELEMENTARY	0	0	1	0	0.00
0612	ELEMENTARY SCHOOL	0	0	1	0	0.00
0220	ELEMENTARY SCHOOL	0	0	2	0	0.00
0505	HIGH SCHOOL	0	2	5	2	40.00
0308	MIDDLE SCHOOL	0	0	1	0	0.00
0TST	ELEMENTARY SCHOOL	0	0	1	0	0.00
0307	MIDDLE SCHOOL	0	1	2	1	50.00
<b>Total:</b>		<b>15</b>	<b>14</b>	<b>55</b>	<b>29</b>	<b>52.73</b>

Page: 1 of 1

## DC Sibling

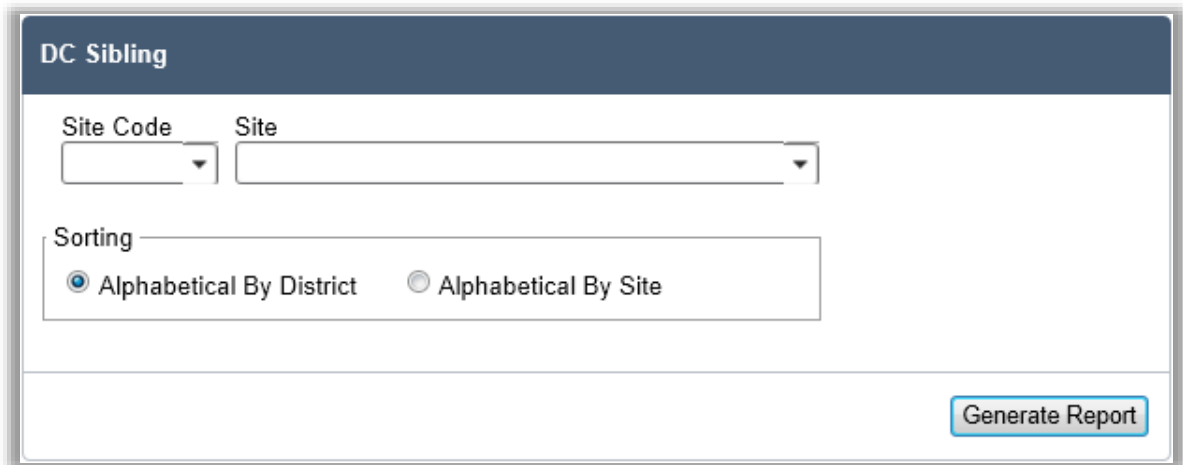


A vertical menu titled "Eligibility Reports" with a small upward-pointing triangle. The menu items are: "Expired Eligibility", "Eligibility Summary", "Student Status Change", "CEP Identified Students", "Percent Economically Disadvantaged", "DC Sibling" (highlighted with a red border), and "Student Activity".

**DC Sibling** provides a list of students that have been included in a Direct Certification import and a possible sibling match with another student.

### To generate a DC Sibling report

1. Select a location.
2. Select a Sorting option.
3. Click **Generate Report**.



The "DC Sibling" form contains the following elements:

- Site Code**: A dropdown menu.
- Site**: A dropdown menu.
- Sorting**: A section with two radio button options: "Alphabetical By District" (selected) and "Alphabetical By Site".
- Generate Report**: A button located at the bottom right of the form.

Report Results

Generated on: 4/15/2018 11:28:39 PM

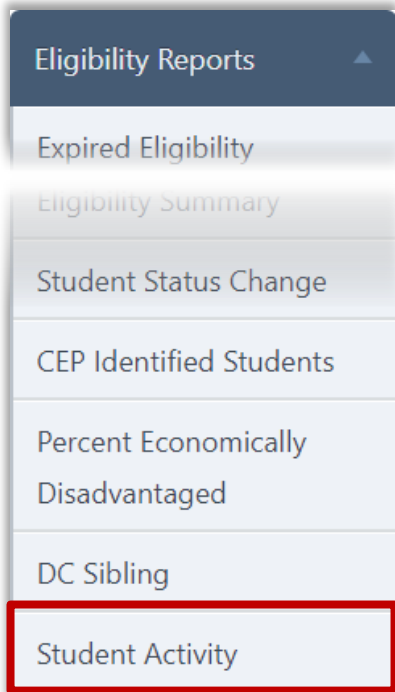
### DC Sibling Matching

ISD

Sibling Student			Certified Student		
Student ID	Student Name	Certified Date	Student ID	Student Name	Certified Date
001	Angel A	10/19/2017	002	Shia I	09/18/2017
061	Aniyah J	08/04/2017	061	Caleb A	10/13/2017
005	Marquavious T	08/04/2017	061	Caleb A	10/13/2017
026	Talayah J	08/04/2017	061	Caleb A	10/13/2017
061	Madyson L	03/07/2018	092	Colt A	03/07/2018
096	Mason I	03/05/2018	076	Sabrina D	01/15/2018
040	Chelsea C	01/05/2018	028	Chloe S	11/28/2017
053	Julian V	08/04/2017	055	Gianna D	08/04/2017
042	Ian M	10/19/2017	053	Mia A	10/13/2017
076	Caroline F	03/05/2018	016	Jackson M	03/05/2018
047	Kameron L	08/04/2017	016	Keishaun L	10/13/2017
053	Daegan J	08/04/2017	007	Jackson J	10/13/2017
038	Alan G	01/11/2018	064	Ivan A	11/28/2017
021	Javon M	03/05/2018	074	Chelsea N	08/04/2017
058	Han N	08/04/2017	013	Tien N	10/13/2017
018	Elisabeth A	10/13/2017	016	Eleazar J	10/13/2017
009	Edgar S	03/05/2018	053	Alejandro	01/15/2018
039	Trevion J	08/04/2017	061	Caleb A	10/13/2017
075	Irene B	01/11/2018	061	Amerie J	08/04/2017
075	Irene B	01/11/2018	061	Amerie J	08/04/2017
079	Camila Z	03/05/2018	090	Cesar F	01/15/2018
049	Marley M	02/01/2018	066	Lucus I	01/15/2018
040	Kalel A	01/15/2018	044	Amery E	10/13/2017
054	Zuesiah I	10/19/2017	086	Aidan A	10/13/2017
052	Jace D	08/04/2017	098	Gavin J	10/13/2017
004	Damian	01/15/2018	014	Ricardo	10/13/2017
042	Mathias	03/05/2018	017	Scarlett	01/15/2018
001	Van B	03/05/2018	067	Cung B	03/05/2018

Page 1 of 3

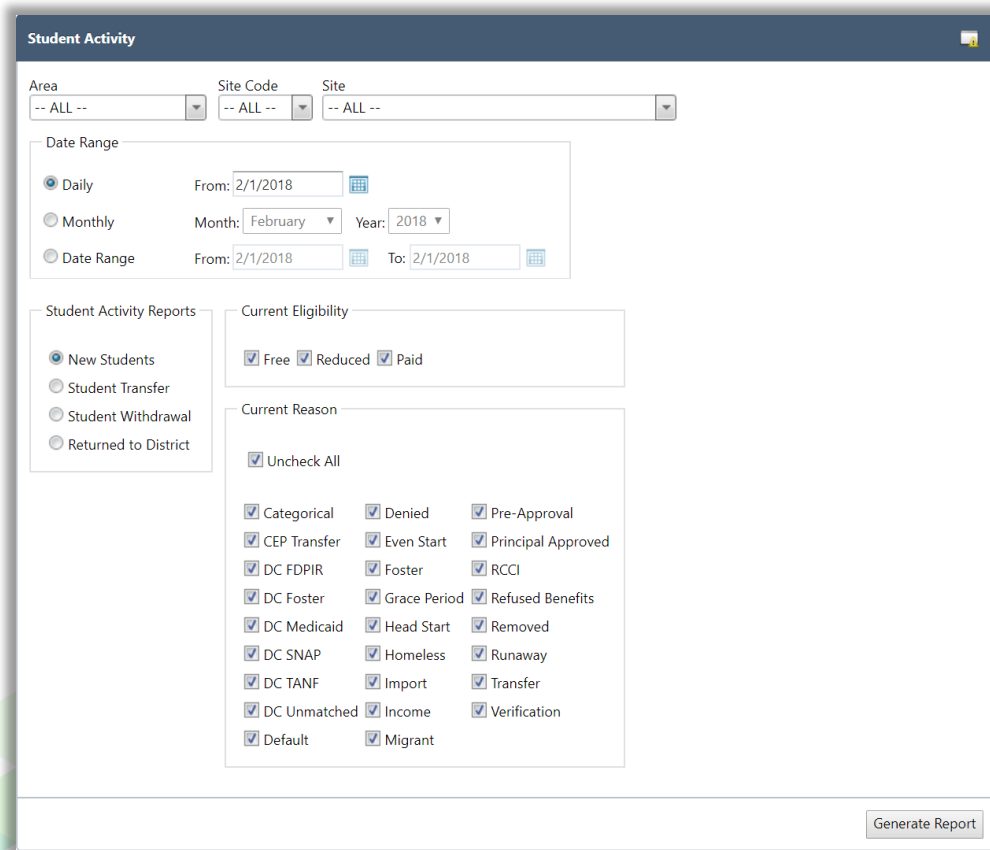
Student Activity



**Student Activity** lists all new students, students who have transferred or students who have withdrawn during a selected date range.

**To generate a Student Activity report**

1. Select a location and a Date Range.
2. Select Student Activity Reports, Current Eligibility, and Current Reason options, as needed.
3. Click **Generate Report**.





Report Results

Generated on: 4/15/2018 11:36:22 PM

### Student Withdrawal

ISD  
12/1/2017 To 12/31/2017

Student ID	Student Name	Grade	Application #	Current Eligibility	Current Reason	Withdrawal Date	Return Date
<b>Site: High School</b>							
06	Cesar F	9	0	Paid	Default	12/11/2017	
14	Trinity C	9	0	Free	Homeless	12/10/2017	
70	Treshawn D	10	1520	Free	Categorical	12/05/2017	
08	Ashley M	11	0	Free	DC SNAP	12/03/2017	
85	Thao N	11	0	Paid	Default	12/03/2017	01/19/2018
17	Rebecca R	11		Paid	Default	12/10/2017	
49	Anissa N	12		Paid	Default	12/10/2017	
82	Katharine E	12		Paid	Default	12/18/2017	
<b>Site: Junior School</b>							
12	Christopher J	6	0	Free	Homeless	12/12/2017	
95	Aliyah C	6		Paid	Default	12/18/2017	
71	Seth T	7	1520	Free	Categorical	12/05/2017	
<b>Site: Elementary</b>							
23	Jon-Matthew	2	0	Free	DC TANF	12/18/2017	
92	Nikhil	3		Paid	Default	12/05/2017	
<b>Site: Elementary</b>							
30	Mikael K	1		Paid	Default	12/11/2017	
11	Sean A	1	0	Free	Categorical	12/11/2017	
10	Jazmine A	3	0	Free	Homeless	12/11/2017	

Page: 1 of 2

Generated on: 4/15/2018 11:36:22 PM

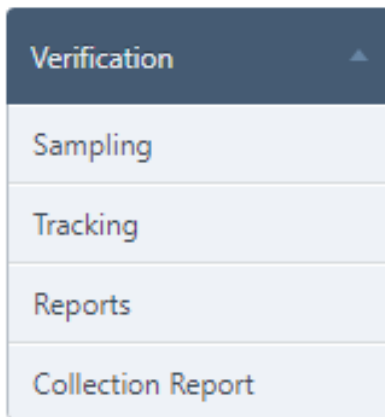
### Student Withdrawal

ISD  
12/1/2017 To 12/31/2017

Current Eligibility	Count	Current Reason	Count
Free	8	Categorical	3
Reduced	0	CEP Transfer	0
Paid	8	DC FDIR	0
<b>Total:</b>	<b>16</b>	DC Foster	0
		DC Medicaid	0
		DC SNAP	1
		DC TANF	1
		DC Unmatched	0
		Default	8
		Denied	0
		Even Start	0
		Foster	0
		Grace Period	0
		Head Start	0
		Homeless	3
		Import	0
		Income	0
		Migrant	0
		Pre-Approval	0
		Principal Approved	0
		RCCI	0
		Refused Benefits	0
		Removed	0
		Runaway	0
		Transfer	0
		Verification	0
		<b>Total:</b>	<b>16</b>

Page: 2 of 2

## Chapter 7: Verification

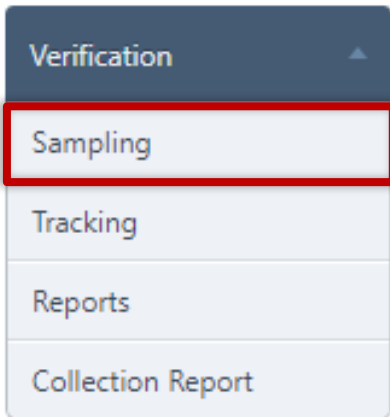


The **Verification** menu (sixth menu in Student Eligibility module) offers functions for Sampling and Tracking applications selected for verification. It also, includes Reports and Collection Report functions for tracking and consolidating verification data.

In this chapter you will learn how to:

- Generate an Error Prone Sampling (Default).
- Update application information received during Verification Tracking.
- Generate and print Verification Reports.
- Generate and print Collection Report.

## Sampling



**Sampling** generates a sample pool of applications for the verification process.

This “first step” in the Verification process is to be completed on October 1<sup>st</sup>, the deadline established by the USDA. Generate the sample on October 1<sup>st</sup>, you should not process applications **after** you generate the sample (consider generating the sample at the end of the day) to ensure that all applications approved as of October 1<sup>st</sup> are accurately considered for Verification.

Sampling Page

**Sampling**

**Verification Samples**

Academic Year	Sample Method	Number of Sites	Number of Applications	Count	Sample Complete	Sample Date	Generated On	Generated By
2018 - 2019	Standard	0	0	(0/0)	True	05/24/2018		Hetteema Kyle

Sampling will be complete immediately after the deadline established by USDA has passed. To ensure that all approved applications processed on or before the USDA deadline are included in the count, click the "Generate Sample" button on the next working day immediately after the deadline as established by the USDA.

**Sampling Methods**

**Default**

- Standard (formerly Error Prone)

**Alternate**

- Alternate One (formerly Random)
- Alternate Two (formerly Focused)

Generate Sample    **Reset Sample**

By default, on the **Sampling** page:

- If your district uses “Areas”, **Area** is set to the first area in the list of available areas.
- The **Sampling Methods** group is set to “Standard (formerly Error Prone)” for **Default**. This is the most commonly used method and you must have approval from your State Agency to use an Alternate method.
- **Number of Applications** displays the total sample pool size (active applications that are approved for Free or Reduced benefits).

**Sampling**

Area  
Area 1

Apply

**Verification Samples**

Academic Year	Sample Method	Number of Applications	Count	Sample Complete	Sample Date	Generated On	Generated By
2013 - 2014	Standard	3	(1/1)	False	10/24/2013		Cybersoft Support

Sampling will be complete immediately after the deadline established by USDA has passed. To ensure that all approved applications processed on or before the USDA deadline are included in the count, click the "Generate Sample" button on the next working day immediately after the deadline as established by the USDA.

**Sampling Methods**

**Default**

- Standard (formerly Error Prone)

**Alternate**

- Alternate One (formerly Random)
- Alternate Two (formerly Focused)

Generate Sample

**To generate a Verification Sampling Pool**

1. Choose a method, if needed.
  2. Click **Generate Sample**.
- ▲ You must have approval from your State Agency to use an Alternate Sampling Method.

**Verification Samples**

Academic Year	Sample Method	Number of Applications	Count	Sample Complete	Sample Date	Generated On	Generated By
2013 - 2014	Standard	3	(1/1)	False	10/24/2013	!	Cybersoft Support

Sampling will be complete immediately after the deadline established by USDA has passed. To ensure that all approved applications processed on or before the USDA deadline are included in the count, click the "Generate Sample" button on the next working day immediately after the deadline as established by the USDA.

Sampling Methods

**Default**

- Standard (formerly Error Prone)

**Alternate**

- Alternate One (formerly Random)
- Alternate Two (formerly Focused)

Generate Sample

Sample generated successfully!

**Sampling**

**Verification Samples**

Academic Year	Sample Method	Number of Sites	Number of Applications	Count	Sample Complete	Sample Date	Generated On	Generated By
2018 - 2019	Standard	2	10	(1/1)	False	10/01/2018	7/30/2018 3:35 PM	Daniel Todd

Sampling will be complete immediately after the deadline established by USDA has passed. To ensure that all approved applications processed on or before the USDA deadline are included in the count, click the "Generate Sample" button on the next working day immediately after the deadline as established by the USDA.

Sampling Methods

**Default**

- Standard (formerly Error Prone)

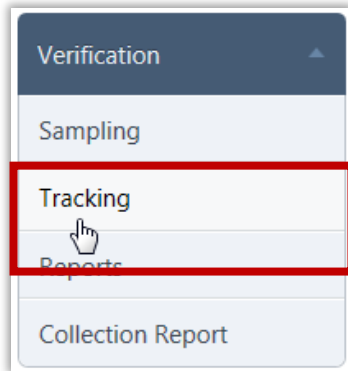
**Alternate**

- Alternate One (formerly Random)
- Alternate Two (formerly Focused)

Generate Sample

- Sponsors must utilize FANS to determine how many applications they are required to confirm. If the FANS sample size and the PrimeroEdge sample size do not match contact your Program Specialist for support.

## Tracking



**Tracking** generates notifications (First, Subsequent and Adverse Action), updates the sample by checking for inactive applications, and replaces applications from households they believe might not be able to respond. After generating the Verification sample, the next step in the Verification process is to conduct the confirmation review prior to notifying the selected households.

## Tracking Page

 A screenshot of the "Tracking" page. At the top, there are filters for "Academic Year" (2018 - 2019), "Verification Status" (Verification Incomplete), and "Confirmation Status" (All). There are "Apply" and "Check for Inactive Applications" buttons. Below the filters is a table titled "2018 - 2019 Verification Incomplete Applications". The table has columns: Application #, Eligibility, Basis, Type, Confirmation, 1st Notice Email, 1st Notice Print, Follow Up Email, Follow Up Print, and Remove. Three rows are visible: application 68 (Confirmed), 69 (Confirm), and 74 (Confirm). A red arrow points from the "Confirm" button in row 74 to the text below.
 

Application #	Eligibility	Basis	Type	Confirmation	1st Notice Email	1st Notice Print	Follow Up Email	Follow Up Print	Remove
68	Free	Income	Cause	Confirmed	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
69	Free	Income	Cause	Confirm	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
74	Free	Income	Cause	Confirm	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

By default, on the **Tracking** page:

- **Academic Year** is set to the current year.
- **Verification Status** is set to "Verification Incomplete".
- If the state agency requires a confirmation review prior to verification your tracking page will have a **Confirm** button for each application pulled for verification. Click the **Application #** to access the application to be reviewed. After you have completed the confirmation review mark the review, complete by clicking the **Confirm** button. The button will be replaced by the word **Confirmed** and a success message will appear.

A screenshot of the "Tracking" page showing a green success message at the top: "Application is confirmed for verification." Below the message is the same "Tracking" page interface as in the previous screenshot, with the "Confirm" button in row 74 now replaced by the word "Confirmed". A red arrow points from the text above to the success message.

### Unselecting inactive applications

All students on a household eligibility application may leave the SFA between the time the sample is pulled and the letters are sent. Checking for inactive applications removes inactive applications from the sample and replaces them with an application on an active student.

1. Click **Check for Inactive Applications**.

Tracking

Academic Year: 2018 - 2019 | Verification Status: Verification Incomplete | Apply | **Check for Inactive Applications**

2018 - 2019 Verification Incomplete Applications |  Show SchoolCafe submissions only | Notify Selected

Application #	Eligibility	Basis	Type	1st Notice Email <input type="checkbox"/>	1st Notice Print <input type="checkbox"/>	Follow Up Email <input type="checkbox"/>	Follow Up Print <input type="checkbox"/>	Remove
67	Free	Income	Cause		✓ <input type="checkbox"/>		<input type="checkbox"/>	
68	Free	Income	Cause		✓ <input type="checkbox"/>		<input type="checkbox"/>	
69	Free	Income	Cause		✓ <input type="checkbox"/>		<input type="checkbox"/>	
74	Free	Income	Cause	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Any inactive applications have been deselected.

Tracking

Academic Year: 2018 - 2019 | Verification Status: Verification Incomplete | Apply | Check for Inactive Applications

2018 - 2019 Verification Incomplete Applications |  Show SchoolCafe submissions only | Notify Selected

Application #	Eligibility	Basis	Type	1st Notice Email <input type="checkbox"/>	1st Notice Print <input type="checkbox"/>	Follow Up Email <input type="checkbox"/>	Follow Up Print <input type="checkbox"/>	Remove
67	Free	Income	Cause		✓ <input type="checkbox"/>		<input type="checkbox"/>	

### Replacing Inactive Applications

If all students on a selected application become inactive, the application must be replaced. It is important to check for inactive applications frequently (most districts do this daily) so that you may begin the Verification on the newly selected application as soon as possible.

When an application(s) is removed, you may see a warning that your sample does not contain enough applications. The numbers in parenthesis indicate “total number in the sample/number required”. This message continues to be displayed until applications are added to the sample.

#### To add active applications to a Verification Sample

1. Click **Check for Inactive Applications**.
2. Click **Add Application(s) to complete sample**.
3. Complete Confirmation review of newly added household application.

The screenshot shows the 'Tracking' interface with the following elements:

- Academic Year: 2018 - 2019
- Verification Status: Verification Incomplete
- Buttons: Apply, **Check for Inactive Applications** (highlighted with a red box)
- Section: 2018 - 2019 Verification Incomplete Applications
- Options:  Show SchoolCafe submissions only, Notify Selected
- Table with columns: Application #, Eligibility, Basis, Type, 1st Notice Email, 1st Notice Print, Follow Up Email, Follow Up Print, Remove.

Application #	Eligibility	Basis	Type	1st Notice Email	1st Notice Print	Follow Up Email	Follow Up Print	Remove
67	Free	Income	Cause		✓ <input type="checkbox"/>		<input type="checkbox"/>	
68	Free	Income	Cause		✓ <input type="checkbox"/>		<input type="checkbox"/>	
69	Free	Income	Cause		✓ <input type="checkbox"/>		<input type="checkbox"/>	
74	Free	Income	Cause	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

The screenshot shows the 'Tracking' interface with a warning message:

Verification sample does not contain enough applications (0/1). To complete your sample, click "Add Application(s) to complete sample".

Options:  Print first notice for new application(s)

Buttons: Add Application(s) to complete sample

Section: 2018 - 2019 Verification Incomplete Applications

Options:  Show SchoolCafe submissions only, Notify Selected

Application #	Eligibility	Basis	Type	1st Notice Print	Follow Up Print	Remove
67	Free	Income	Cause	<input type="checkbox"/>	<input type="checkbox"/>	
68	Free	Income	Cause	<input type="checkbox"/>	<input type="checkbox"/>	
69	Free	Income	Cause	<input type="checkbox"/>	<input type="checkbox"/>	
74	Free	Income	Cause	<input type="checkbox"/>	<input type="checkbox"/>	



### Sending First Notice Letters

The Response Due Date included in the First Notice letter is based on a system setting—15 calendar days by default. This is controlled through a system setting, “[Verification Response Due X Days from Letter Date](#)”. Letters can be reprinted at any time.

#### To print 1<sup>st</sup> Notice notices

1. Select “Verification Incomplete” in **Verification Status**.
2. Click **Apply**.
3. Either select  in the **1<sup>st</sup> Notice Print/1<sup>st</sup> Notice Email** column header to print letters for All applications, or select individual application listings (add check mark).
4. Click **Notify Selected**.

The screenshot shows the 'Tracking' interface. At the top, there are filters for 'Academic Year' (2018 - 2019) and 'Verification Status' (Verification Incomplete). The 'Apply' button is highlighted with a red box. Below the filters, there is a table titled '2018 - 2019 Verification Incomplete Applications'. The table has columns for Application #, Eligibility, Basis, Type, 1st Notice Email, 1st Notice Print, Follow Up Email, Follow Up Print, and Remove. The first row shows application #67 with a green checkmark in the '1st Notice Print' column.

The screenshot shows the same 'Tracking' interface. The 'Notify Selected' button is highlighted with a red box. A red dashed box highlights the '1st Notice Print' column, which now contains green checkmarks for applications 67, 68, 69, and 74. Application 67 also has a green checkmark in the '1st Notice Email' column.

A success message appears above the **Tracking** page when letters have been printed. The green check mark indicates that the verification letter has been printed for that application.

- The email notification option will only appear if the guardian’s email is in the student’s profile and the system setting “[Email Notification](#)” is set to YES. This is a RED setting that **is currently defaulted to NO, contact your Program Specialist/State Agency to get additional information on how to use this feature.**

### Sending Follow-Up Notices

At the time the Follow-Up Notice is generated, the Response Due Date is re-set based on a system setting—15 calendar days by default which can be changed through a system setting.

#### To print Follow-Up notices

1. Select “Verification Incomplete” in **Verification Status**.
2. Click **Apply**.
3. Select **Follow Up Print/Follow Up Email** in the column header or select individual applications.
4. Click **Notify Selected**.

The screenshot shows the 'Tracking' interface. At the top, there is a filter menu with 'Academic Year' set to '2018 - 2019'. The 'Verification Status' dropdown is set to 'Verification Incomplete', and the 'Apply' button is highlighted with a red box. Below the filter menu, there is a table titled '2018 - 2019 Verification Incomplete Applications'. The table has columns for Application #, Eligibility, Basis, Type, 1st Notice Email, 1st Notice Print, Follow Up Email, Follow Up Print, and Remove. The first row shows Application # 67 with a green checkmark in the 1st Notice Print column.

The screenshot shows the '2018 - 2019 Verification Incomplete Applications' table. The 'Notify Selected' button is highlighted with a red box. The table has columns for Application #, Eligibility, Basis, Type, 1st Notice Email, 1st Notice Print, Follow Up Email, Follow Up Print, and Remove. The first four rows show Application # 67, 68, 69, and 74. The 'Follow Up Print' column for all four rows has a checkmark icon. The '1st Notice Print' column for rows 67, 68, and 69 has a green checkmark icon. The '1st Notice Email' column for row 74 has a green checkmark icon.

A success message appears above the **Tracking** page when letters have been printed. The green check mark indicates that the verification letter has been printed for that application.

### Sending Adverse Action Notification

If you have sent at least two notices (1<sup>st</sup> and Subsequent), then you may send an Adverse Action Notification to the family. Adverse Action completes the Verification process for the application and reduces the students' eligibility benefits after 10 calendar days. Most districts wait until November 15<sup>th</sup> to send the Adverse Action Notice to allow for the possibility that the family may respond. November 15<sup>th</sup> is the very last day that you can send the Adverse Action Notice and complete Verification by the USDA deadline.

- Households that have notified the sponsor that they refused to respond will also receive adverse action notifications. Once the sponsor receives refusal to respond documentation follow the steps on page 169 – Processing a verification response. Answering “Was notification received of refusal to respond?” with **Yes** will change the benefits and allow the user to print the notification letter.

#### To print Adverse Action notices

1. Select a year in **Academic Year** and select “No Response” in **Verification Status**.
2. Click **Apply**.
3. Select check box in the **Completion Notice Email/Completion Notice Print** column header or select individual application (add check mark).
4. Click **Notify Selected**.

The screenshot shows the 'Tracking' interface. At the top, there are two dropdown menus: 'Academic Year' set to '2018 - 2019' and 'Verification Status' set to 'No Response'. To the right of these is an 'Apply' button, which is highlighted with a red box. Further right is a 'Check for Inactive Applications' button. Below the filters is a table titled '2018 - 2019 No Response Applications'. The table has columns for Application #, Eligibility, Basis, Type, 1st Notice Email, 1st Notice Print, Follow Up Email, Follow Up Print, Completion Notice Email, and Completion Notice Print. Two rows are visible: application 69 and application 74. Application 69 has a green checkmark in the '1st Notice Print' column. Application 74 has green checkmarks in both the '1st Notice Email' and '1st Notice Print' columns. A 'Notify Selected' button is located at the top right of the table area.

This is a close-up view of the bottom right portion of the table from the previous screenshot. The 'Notify Selected' button at the top right is highlighted with a red box. Below it, the 'Completion Notice Print' column header is also highlighted with a red box. In the row for application 74, a checkmark is visible in the 'Completion Notice Print' column, indicating that this application has been selected for notification.

## Removing an Application from Tracking

Districts are allowed to remove and replace up to 5% of their sample applications when the LEA believes that the household will be unable to respond to the verification attempts. It is up to each district to follow the guidelines of 5% if they choose to remove applications.

### To remove an application

1. Click **Delete** in an application listing.
2. Enter comment text in the **Remove Application Confirmation** popup.
3. Click **Remove Application**.

The screenshot shows the 'Tracking' application interface. At the top, there are filters for 'Academic Year' (2018 - 2019) and 'Verification Status' (Verification Incomplete), along with 'Apply' and 'Check for Inactive Applications' buttons. Below the filters is a table titled '2018 - 2019 Verification Incomplete Applications'. The table has columns for Application #, Eligibility, Basis, Type, 1st Notice Email, 1st Notice Print, Follow Up Email, Follow Up Print, and Remove. A red box highlights the 'Remove' button for application #68. Below the table, a 'PrimeroEdge - Remove Application Confirmation' dialog box is open. It displays 'Application #: 68' and asks 'Are you sure you want to remove this application from Verification?'. A text area contains the comment 'Family not available at this time.' and is highlighted with a red dashed border. A red arrow points from the 'Remove' button in the table to the text area. At the bottom of the dialog, the 'Remove Application' button is highlighted with a red box.

Application #	Eligibility	Basis	Type	1st Notice Email	1st Notice Print	Follow Up Email	Follow Up Print	Remove
67	Free	Income	Cause		✓			
68	Free	Income	Cause		✓			
69	Free	Income	Cause		✓			
74	Free	Income	Cause	✓	✓			

When an application(s) is removed, you may see a warning message regarding sample size. Numbers in parenthesis indicate the “total number in the sample/number required”. This message continues to appear until applications are added to the sample.

Click **Add Application(s) to Complete Sample** to add applications to the verification sample.

## Processing a Verification Response

When a family submits a response you will record the information in the Application Record. Although the Application record is most commonly accessed via Master Index outside of the Verification process, you can quickly access the record through the **Tracking** page.

The **Verification** tab displays Verification details for this application. This tab is where you will record the response from the household.

### To process a verification response

1. Click the [Application Number](#) link in an application listing.

Application #	Eligibility	Basis	Type	1st Notice Email	1st Notice Print	Follow Up Email	Follow Up Print	Remove
1	Reduced	Income	Cause					
2	Reduced	Applicant refused benefits	Cause					
5	Free	Income	Cause					
7	Reduced	Income	Cause					
40	Free	Income	Cause					
61	Free	Income	Cause		✓			

2. Click the **Verification** tab.
3. In the **Verification** sub-box answer each question as it is presented.
  - a. Were all students directly verified? No, answer next question –
  - b. Was notification received of refusal to respond? Yes, click **Refuse Benefits** and **Verification Complete**. No, answer next question –
  - c. Is the case number confirmed? Yes, enter case number, select benefit type, and click **OK**. No, answer next question –

Verification

Were all students directly verified?  Yes  No

Was notification received of refusal to respond?  Yes  No

Is the Case Number Confirmed?  Yes  No

Case Number:  SNAP

- d. Categorically Eligible: Other Source? Yes, click **Verification Complete**. No, then verify household income using submitted documents. Click **Edit** (✎) to change the household income, as necessary.

Students			
Student ID	Name	Foster	Direct Approval
495442267	FEBRUARY, CATHY	<input type="checkbox"/>	NO

Household Members				Add Member ...	
Name	Income Type	Income Amount	No Income		
February, Cathy			<input checked="" type="checkbox"/>	✎	🗑
Test, Dan	Work	\$1,000.00(M)	<input type="checkbox"/>	✎	🗑

Household Size:	<input type="text" value="2"/>	Total Verified Income (M):	<b>\$1,000.00</b>
-----------------	--------------------------------	----------------------------	-------------------

Note: If any household members are added or removed within the verification process, please manually update the "Household Size" to recalculate the income eligibility.

- **To save the data without completing Verification** - If more information regarding the application is to be provided at a later date and you simply want to save the new information without completing the verification process for the application:

- Click **Save**, then click **Close**.

4. Next scan or upload supporting documents.

## Scanning and Uploading Supporting Documents

Documents can be scanned or uploaded and saved with the application through the **Documents** tab.

- **Note:** Scanning must be done from a computer with a scanner connected directly to the computer.

### To scan a document

1. Place the document in the scanner.
2. Click **Scan**.
3. In Description, enter a brief description for the document.
4. Click **OK** to save the scan and close the page.

Application #: 61 (4 of 4) Batch #: 58

Validate

Application Info   Optional Info   Guardian Info   History   Refuse Benefits   Image/Documents   **Verification**

**The University of North Carolina at Chapel Hill**  
107 South Building, Campus Box 9100  
Chapel Hill, NC 27599-9100

Pay Group: SNC SBEA Non Except  
Pay Begin Date: 07/13/2017  
Pay End Date: 07/23/2017

Business Unit: UNCPH  
Address #: 0000000214873  
Address Date: 08/04/2017

Employee Name	Employee ID	Department	Location	Job Title	Pay Rate
CHRISTIE DELL, NC 27517	00000000	20010-WS21-002 Information Mgmt	CHapel Hill	Admin Support Specialist	\$45,000.00 Annual

TAX DATA		Federal	NC State
Tax Status:	Single		Single
Address:	0		
Addr. Percent:			
Addr. Amount:			

Description	Rate	Current		YTD		Description	Current	YTD
		Hours	Earnings	Hours	Earnings			
Regular	30.548840	14.30	1,311.54	83.00	17,460.03	Full Workload	142.00	3,330.74
Sick	30.548840	3.20	75.21	18.20	395.51	Full MCH/ST	21.11	566.81
Business Leave	30.548840	2.00	40.00	16.00	332.27	Prod GAL/DEB	14.26	1,088.15
Advance Weather Coal III Close		0.00	0.00	0.00	0.00	NC Workload	61.60	1,120.00
Civil Leave		0.00	0.00	0.00	0.00			
Thrift		0.00	0.00	0.00	0.00			
Minib/Communication Device S/O		0.00	0.00	0.00	0.00			
Overtime - 20 Time		0.00	0.00	14.20	340.60			
Overtime - Straight Time		0.00	0.00	14.20	315.64			
Regular Overtime Weeks		0.00	0.00	300.00	7,266.84			
Vacation		0.00	0.00	27.50	537.30			
<b>TOTAL:</b>		<b>80.00</b>	<b>1,827.74</b>	<b>1,060.00</b>	<b>28,797.21</b>	<b>TOTAL:</b>	<b>160.00</b>	<b>6,028.24</b>

BEFORE-TAX DEDUCTIONS		AFTER-TAX DEDUCTIONS		EMPLOYER PAID BENEFITS	
Description	Current	Description	Current	Description	Current
Charity	97.00	NC State Fungl Credit Union	3.00	T52K5 - Retirement	220.81
Cellular	22.00	Balance Standard AD&D Empl	2.00	State Health Plan R030	229.74
UNC Traffic Office - Parking	36.31			Insured Income for LIFE0*	0.00
NC Tax Group Lab Employee	12.50				157.48
Charity Plan	10.41				
Charity Plan	7.29				
State Health Plan R030	7.52				
Vision Plan	4.29				
NC Tax Voluntary AD&D Empl	6.85				
<b>TOTAL:</b>	<b>169.83</b>	<b>ASU(2)</b>	<b>27.00</b>	<b>407.00</b>	<b>TAXABLE</b>

	TOTAL GROSS	FED TAXABLE GROSS	TOTAL TAXES	TOTAL DEDUCTIONS	NET PAY
Current	1,627.74	1,417.51	60.44	212.13	1,144.73
YTD	38,707.71	25,539.47	4,038.71	5,787.22	18,398.25

LEAVE BALANCE/ACTIVITY	VACATION	SICK	NET PAY DISTRIBUTION	Disposit Amount
Your Begin Balance	107.43	214.00	Account Type	Account Number
Earned This Year	76.33	54.00	Checking	XXXXXXXXXXXX
Used This Year	32.50	27.50		
End Balance	251.66	240.50		1,040.73

LEAVE DATA VALID THRU: 07/23/2017 **TOTAL:** 1,040.73

For current and detailed leave information, log into TDS

MESSAGE:

**Documents**

Primary

Test... - Other

Test... - Pay Stub

Document Details

Description: Test... - Pay Stub  
Date: 7/13/2018

Add Document





Scan  Upload File

**To upload a document**

1. Click **Upload File**.
2. Select the file name and click **Open**.
3. Click **Upload**.
4. Enter a description to name the file.
5. Check **Verification Document** to add an image link to the Verification tab.
6. Click **OK**.

**To view a scanned/uploaded document**

1. Select the document description in the list to display the image on the left.
2. Hover over the image with the mouse cursor to enlarge areas of the document.

Documents	
<a href="#">Primary</a>	
<a href="#">team?</a>	 
<a href="#">Pay Stub</a>	 

**To delete a scanned/uploaded document**

1. Click **Delete** next to the document you wish to delete.
2. Click **OK** in the confirmation message.

- Verification documents submitted via SchoolCafe.com will be identified with this logo: 



**To save the data and complete Verification**

If all information is complete and you want to save the new information and complete the verification process for the application:

1. Click **Verification Complete**.
2. Click **Yes** in the confirmation message.
3. Click **Completion Notice** on the Verification tab.

Name	Income Type	Income Amount	No Income
April, Misty			<input checked="" type="checkbox"/>

Household Size: 0 Total Verified Income (Y): 50.00

Note: If any household members are added or removed within the verification process, please manually update the "Household Size" to recalculate the income eligibility.

Save Verification Complete »

Income Details

This will mark the verification for this application as complete.

Do you wish to continue?

Yes No

Verification Results

Verification Result: No Change

Reason for Change:

Change Date:

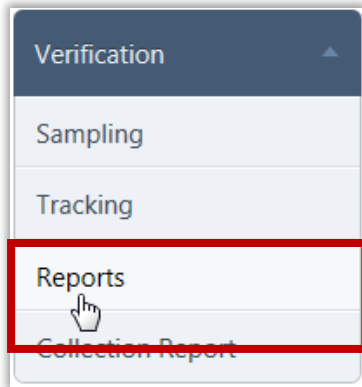
Official:

Completion Date: 7/13/2018 2:44 PM

Completion Notice Date:

Completion Notice

## Reports



**Reports** generates reports used in the verification process.

Six reports are available:

- **Application Images**—displays images of the verification applications.
- **Pre-Verification Details**—lists completion date and change details for each application.
- **Verification Results Details**—lists all applications by eligibility with application processing details.
- **Verification Worksheet**—lists processing details for all applications including guardian information.
- **Verification Student List**—lists notification information for all processed applications, including student and guardian information.
- **Verification Tracking Form**—displays the worksheets for verification tracking forms, including contacts and responses.

## Reports Page

 A screenshot of the 'Reports' page in a software application. At the top, there is a header 'Reports'. Below it is an 'Academic Year' dropdown menu set to '2018 - 2019'. Underneath is a section titled 'Verification Reports' containing a list of radio button options: 'Application Images' (selected), 'Other', 'Online', 'Pre-Verification Details', 'Verification Results Details', 'Verification Worksheet', 'Verification Student List', and 'Verification Tracking Forms'. At the bottom right of the page is a 'Generate Report' button.

By default, on the **Reports** page:

- **Academic Year** is set to the current school year.
- **Application Images** is selected in the Verification Reports group.

Application Images

To generate Application Images

1. Select **Application Images** and click **Generate Report**.

Application #: 1616

**Independent School District**  
**Free and Reduced-Price Meals Household Application for 2013-2014**  
USE BLACK OR DARK BLUE INK. PRINT NEATLY. COMPLETE ONE APPLICATION PER HOUSEHOLD.

**PART 1 — Names of ALL Children in School**

Student ID Number or Social Security Number (Optional)	Last Name	First Name	MI	Date of Birth (Optional)	Mark if Foster Child	Grade	School Code
	HARRY			1/17/2001	03	207	

**PART 2 — SNAP/TANF/FDPIR Number**

If any member of your household receives SNAP/TANF/FDPIR provide the eligibility group number. (If any, SKIP TO PART 5)

SNAP/TANF/FDPIR Eligibility Group Number: \_\_\_\_\_

Name: \_\_\_\_\_

**PART 3 — Homeless, Migrant, Runaway**

If the child you are applying for is homeless, migrant, or runaway, check the appropriate box and contact your school's administrative offices at: (254) 792-6922 or 1-877-530-5922

Homeless  Migrant  Runaway  2

**PART 4 — Household Members and Gross Income From Last Month**

List each person in the household. For each person who receives income, write the amount received and fill in how often it is received.

1. Name (Last, First) List everyone in Household. Attach a separate sheet if needed.	2. Mark Box if Income	3. Income and how often it is received: W = Weekly, E = Every 2 weeks, T = Twice per month, M = Monthly									
		Earnings from Work Before Deductions	How Often?	Welfare Payments, Child Support, Alimony	How Often?	Pension, Retirement, Social Security	How Often?	Other	How Often?		
HARRY	X	0.00	M	0.00		0.00		0.00			
SANDY	X	0.00	M	0.00		0.00	M		M		M

**PART 5 — Signature and Social Security Number - (Adult must sign.)**

An adult household member must sign the application. If Part 4 is completed, the adult signing the form must also list the last 4 digits of his or her Social Security Number or mark the "I do not have a Social Security Number" box. (See Privacy Act Statement on the back of this page)

I certify (promise) that all information on this application is true and that all income is reported. I understand that the school system may get federal funds based on the information I give. I understand that school officials may verify (check) the information. I understand that if I purposely give false information, my child(ren) may lose meal benefits, and I may be prosecuted.

Signature: SANDY LEMON Today's Date: 8/26/2013 Last 4 Digits of Social Security Number: \_\_\_\_\_

Printed Name: SANDY LEMON Home Phone Number: \_\_\_\_\_ Work Phone Number: \_\_\_\_\_

Address: 14222 Wunderlich drive State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_

Visit <http://www.wacoisd.org>, choose Support, choose Child Nutrition Services, choose School Meal Application on the left side, and click on the On-Line application banner on the left side to fill out this application electronically.

RETURN COMPLETED APPLICATION TO 811 FRANKLIN AVENUE, WACO, TX 76701 TO CHILD'S SCHOOL OFFICE OR TO SCHOOL CAFETERIA MANAGER

**Pre-Verification Details**

To generate a Pre-Verification Details report

1. Select **Pre-Verification Details** and click **Generate Report**.

Generated on: 8/10/2018 12:54:45 AM

### Pre-Verification Details

School District Name: One Accord Christian Ministries-1051 - 2018 - 2019

Batch #	App #	ID	Type	Completion Date	Results / Changes	Reason For Changes
<b>Verification Collection Report Section 4-1</b>						
61		66	546987123			
64		71	789456321			
<b>Total</b>		<b>2</b>	<b>2</b>			
<b>Verification Collection Report Section 4-2</b>						
			105112992			
60		63	12345			
61		65				
62		67	105112158	Cause	8/10/2018	No Change
63		69	747747878	Cause		INCOMPLETE
64		70	105112318	Sampled	8/6/2018	No Change
64		73	9516278963			
65		74	852989634	Cause		INCOMPLETE
67		75	741152563			
<b>Total</b>		<b>8</b>	<b>8</b>			
<b>Verification Collection Report Section 5-4</b>						
64		70		Sampled	8/6/2018	No Change
64		73				
67		75				
<b>Total</b>		<b>3</b>	<b>0</b>			
<b>Verification Collection Report Section 5-5</b>						
64		70		Sampled	8/6/2018	No Change
<b>Total</b>		<b>1</b>	<b>0</b>			
<b>Grand Total:</b>		<b>14</b>	<b>10</b>			

Page: 1 of 1

**Verification Results Details**

To generate a Verification Results report

1. Select **Verification Results Details** and click **Generate Report**.

Generated on: 8/10/2018 12:57:27 AM

### Verification Results

School District Name: One Accord Christian Ministries-1051 - 2018 - 2019

Batch #	App #	ID	Completion Date	Results / Changes	Reason For Changes
<b>Section 5-8-1. No Change</b>					
<b>B. FREE Eligible based on income/household size application</b>					
62	67	105112158	8/10/2018	No Change	
64	70	105112318	8/6/2018	No Change	
<b>Total</b>	<b>2</b>	<b>2</b>			
<b>Section Total</b>	<b>2</b>	<b>2</b>			
<b>Grand Total:</b>	<b>2</b>	<b>2</b>			

Page: 1 of 1

Verification Worksheet

To generate a Verification Worksheet

1. Select **Verification Worksheet** and click **Generate Report**.

Batch #	App #	Type	Students	Guardian Name	Guardian Phone	First Notice Sent	Follow Up Notice Sent	Completion Date	Completion Notice Sent	Results / Changes	Reason For Changes
762	8398	Sampled	1		7296	10/1/2012		10/11/2012	10/11/2012	No Change	
764	8407	Sampled	1		-3361	10/1/2012		10/12/2012	10/12/2012	No Change	
770	8450	Sampled	2		-6453	10/1/2012	10/15/2012	10/15/2012	10/15/2012	Reduced to Paid	Income
771	8486	Sampled	1		-7414	10/1/2012		10/11/2012	10/11/2012	No Change	
772	8503	Sampled	1			10/1/2012		10/12/2012	10/12/2012	Reduced to Free	Income
772	8513	Sampled	1		-3043	10/1/2012	10/15/2012	10/24/2012	10/24/2012	No Change	
773	8532	Sampled	1			10/1/2012	10/15/2012	11/15/2012	11/15/2012	Reduced to Paid	No Response
773	8537	Sampled	1		-8096	10/1/2012	10/15/2012	10/15/2012	3/6/2013	Free to Paid	Income
774	8551	Sampled	1		-5731	10/1/2012	10/15/2012	11/14/2012	11/14/2012	Reduced to Paid	Income
775	8571	Sampled	1		-0288	10/1/2012		10/12/2012	10/12/2012	No Change	
775	8582	Sampled	2		-8361	10/1/2012	10/15/2012	11/2/2012	11/2/2012	Free to Reduced	Income
			1			10/1/2012		10/9/2012	10/10/2012	No Change	
					-7415	10/1/2012	10/15/2012	10/15/2012	10/15/2012	Free to Reduced	Income

818	9452	Sampled	2			10/1/2012		10/9/2012	10/9/2012	No Change	
818	9458	Sampled	1		-9452	10/1/2012	10/15/2012	10/26/2012	10/26/2012	No Change	
818	9464	Sampled	2		-7679	10/1/2012	10/15/2012	11/2/2012	11/2/2012	No Change	
859	10319	Cause	2		-6329	4/4/2013	4/15/2013	4/19/2013	4/19/2013	No Change	
882	10780	Sampled	2		-8150	10/1/2012		10/9/2012	10/11/2012	No Change	
892	11231	Sampled	1		-4913	10/1/2012		10/9/2012	10/9/2012	No Change	
936	11996	Sampled	1		-5003	10/1/2012		10/9/2012	10/9/2012	No Change	
1033	13960	Cause	3			9/7/2012	9/17/2012	10/3/2012	10/3/2012	Free to Paid	No Response
1072	14408	Sampled	1		-8389	10/1/2012		10/9/2012	10/9/2012	No Change	
1362	16106	Cause	2		-1827	3/1/2013	3/6/2013	3/15/2013	3/15/2013	Reduced to Free	Income
<b>Total:</b>			<b>52</b>							<b>82</b>	

## Verification Student List

To generate a Verification Student List report

1. Select **Verification Student List**.
2. Enter **Site Code** and **Site**, if needed and click **Generate Report**.

Batch #	App #	Type	Student Name	Guardian Name	Guardian Phone	First Notice Sent	Follow Up Notice Sent	Completion Date
Site: [Redacted]								
778	8617	Sampled	Khalista		[Redacted]-1469	10/1/2012		10/11/2012
795	8987	Sampled	Samuel		[Redacted]-9565	10/1/2012	10/15/2012	10/29/2012
Site: [Redacted]								
776	8598	Sampled	Devin			10/1/2012		10/9/2012
770	8450	Sampled	Krista		[Redacted]-6453	10/1/2012	10/15/2012	10/15/2012
770	8450	Sampled	William		[Redacted]-5419	10/1/2012	10/15/2012	10/15/2012
Site: [Redacted]								
793	8937	Sampled	Jada		[Redacted]-7808	10/1/2012	10/15/2012	10/17/2012
Site: [Redacted]								
51		Sampled	Caleb		[Redacted]-5731	10/1/2012	10/15/2012	11/14/2012
			Savannah				10/15/2012	10/15/2012

First Page

783	8735	Sampled	Cole		[Redacted]-8213	10/1/2012	10/15/2012	10/26/2012
785	8780	Sampled	Macie		[Redacted]-8794	10/1/2012	10/15/2012	10/15/2012
Site: [Redacted]								
792	8896	Sampled	Lauren		[Redacted]-1673	10/1/2012		10/11/2012
Site: [Redacted]								
783	8737	Sampled	Desmond		[Redacted]-6822	10/1/2012	10/15/2012	10/19/2012
Site: [Redacted]								
813	9352	Sampled	Cameron		[Redacted]-4158	10/1/2012	10/15/2012	10/15/2012
882	10780	Sampled	Astin		[Redacted]-8150	10/1/2012		10/9/2012
882	10780	Sampled	Aryun		[Redacted]-8150	10/1/2012		10/9/2012
Site: [Redacted]								
809	9253	Sampled	Giovanni		[Redacted]-5247	10/1/2012	10/15/2012	10/16/2012
817	9424	Sampled	Kaleigh		[Redacted]-4031	10/1/2012	10/15/2012	11/5/2012
Total Students :			82					

Last Page

Verification Tracking Forms

To generate and print Verification Tracking Forms

1. Select **Verification Tracking Forms** and click **Generate Report**.

Generated on: 9/10/2013 12:12 PM

### Verification Tracking Forms

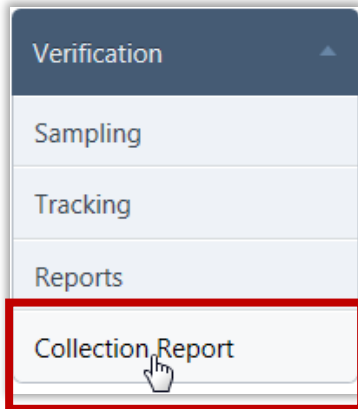
SCHOOLS - 2013 - 2014

<b>Applicant Name:</b> _____, RAYMOND	
Processor - please initial any action	
<b>Batch #:</b> 549	<b>App #:</b> 1595
<b># Students on App:</b> 1	
<b>How was the application originally approved?</b> Reduced, Income	
<b>Verification Action:</b>	<b>Date:</b>
Verification Notice Sent	<input type="checkbox"/> No Answer <input type="checkbox"/> Left Voicemail
Verification Response Due	<input type="checkbox"/> Bad/Disconnected Number
Second Notice Sent	<input type="checkbox"/> Left Message With:
Response Received	9/10/2013 <input type="checkbox"/> Other:
<b>Verification Results:</b>	
<input type="checkbox"/> Free to Paid	<input type="checkbox"/> Pay Stub(s)/Earning Statement(s)
<input type="checkbox"/> Free to Reduced	<input type="checkbox"/> Employer Statement
<input type="checkbox"/> Reduced to Paid	<input type="checkbox"/> Benefit/Award Statement (Social security, pensions)
<input type="checkbox"/> Reduced to Free	<input type="checkbox"/> Unemployment, Disability or Worker's Comp
<input type="checkbox"/> Paid to Reduced	<input type="checkbox"/> Public Assistance Letter/Statements
<input type="checkbox"/> Paid to Free	<input type="checkbox"/> Divorce Decree/Custody Order/Checks/Statements
<input checked="" type="checkbox"/> No Change	<input type="checkbox"/> Other Income (Rent, dividends, etc.)
	<input type="checkbox"/> Statement of No Income
	<input type="checkbox"/> Other:
<b>Documents Submitted for Verification:</b>	
<b>Action:</b>	<b>Date:</b>
Change Effective	<input type="checkbox"/> Income Change <input type="checkbox"/> Household Size Change
Notice of Change	<input type="checkbox"/> Change in SNAP/TANF <input type="checkbox"/> No Response
Fair Hearing Request	<input type="checkbox"/> Income HH submitted SNAP/TANF <input type="checkbox"/> Refused Benefits
Fair Hearing Date	<input type="checkbox"/> Other:
Hearing Determination:	
Notes:	
Verifying Official Signature	Date

Page: 1 of 3



## Collection Report

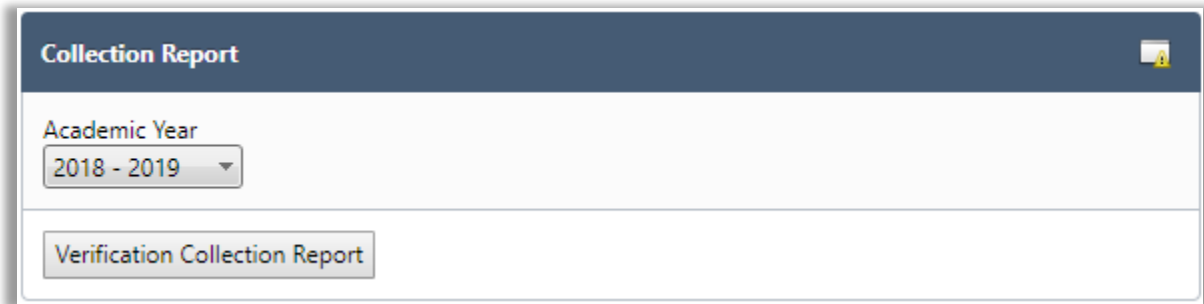


**Collection Report** is a two-page report that summarizes verification data. The report is submitted for SFAs that participate in the National School Lunch Program and/or the School Breakfast Program (SBP).

Initial report data is submitted to the State Agency by November 30 each year.

After reapplications have been submitted and processed, final submission of the data is February 15.

### Collection Report Page



By default, on the Collection Report page:

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

To generate a Verification Collection report

1. Click Verification Collection Report.

http:// /reportviewer.aspx - Windows Internet Explorer

Generated on: 9/10/2013 12:26 PM

Department of Agriculture, Food and Nutrition Service

### School Food Authority (SFA) Verification Collection Report

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

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

SFA ID#:	Type of SFA: <input checked="" type="checkbox"/> Public <input type="checkbox"/> Nonprofit/Private	School Year: 2013 - 2014
SFA Name: SCHOOLS	SFA City:	SFA Zip code:

Section 1 Total Schools, Residential Child Care Institutions (RCCIs) and Enrolled Students	**All SFAs must report Section 1**	A. Number of Schools OR Institutions	B. Number of Students
	1-1: Total schools (Do not include RCCIs):	2	349
	1-2: Total RCCIs (Do not include schools counted in 1-1):	-----	-----
	1-2a: RCCIs with day students (Report ONLY day students in 1-2aB):	-----	-----
	1-2b: RCCIs with NO day students:	-----	-----

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

Section 3 Students approved as FREE eligible NOT subject to verification	**ALL SFAs must report Section 3 or check box 3-1 if applicable**	B. Number of FREE Students
	3-1: <input type="checkbox"/> Check the box only if all schools and/or RCCIs in the SFA were not required to perform direct certification with SNAP (i.e. NON BASE year Provision 2/3 for all schools)	
	3-2: Students directly certified through Supplemental Nutrition Assistance Program (SNAP): Do not include students certified with SNAP through the letter method.	0
	3-3: Students directly certified through other programs: Include those directly certified through Temporary Assistance for Needy Families (TANF), Food Distribution Program on Indian Reservations (FDPIR), or Medicaid (if applicable); those documented as homeless, migrant, runaway, foster, Head Start, Pre-K Even Start, or non-applicant but approved by local officials. DO NOT include SNAP students already reported in 3-2.	4
	3-4: Students certified categorically FREE eligible through SNAP letter method: Include students certified for free meals through the family providing a letter from the SNAP agency.	-----

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

T-1: Total FREE Eligible Students Reported:	6	T-2: Total REDUCED PRICE Eligible Students Reported:	1
---	---	--	---

Page: 1 of 2

Page 1

http:// /reportviewer.aspx - Windows Internet Explorer  
 Generated on: 9/10/2013 12:32 PM

Department of Agriculture, Food and Nutrition Service  
**School Food Authority (SFA) Verification Collection Report**

Section 5

\*\*ALL SFAs must report Section 5 or check box 5-1 if applicable\*\*  
 5-1:  Check the box if ALL schools and/or RCCIs are exempt from verification.  
 If 5-1 is checked, no further reporting in Section 5 is required.

5-2: Was verification performed and completed? <input type="checkbox"/> Yes, completed by November 15th <input type="checkbox"/> Yes, completed after November 15th <input checked="" type="checkbox"/> No, verification was NOT performed or the process was not completed.	5-3: Type of Verification process used: 1. <input checked="" type="checkbox"/> Standard (Lesser of 3% or 3,000 error-prone) 2. <input type="checkbox"/> Alternate one (Lesser of 3% or 3,000 selected randomly) 3. <input type="checkbox"/> Alternate two (Lesser of 1% or 1,000 error prone applications PLUS lesser of one-half of one percent or 500 applications with SNAP/TANF/FDPIR case numbers)
---	--

If 1 or 3 is checked in 5-3, report 5-4. If 2 is checked in 5-3, enter "N/A" in 5-4.	5-4: Total ERROR PRONE applications: Report all applications as of October 1st considered error prone	3	5-5: Number of applications selected for verification sample:	0
---	---	---	---	---

\*\*ALL SFAs must report 5-7 or check box 5-6 if applicable\*\*

5-6: <input checked="" type="checkbox"/> Check the box if direct verification was not conducted in the SFA, (i.e. not one of the schools and/or RCCIs in the SFA performed direct verification). If 5-6 is checked, skip 5-7.	<b>A. Number of Applications</b>	<b>B. Number of Students</b>
Report if FREE and/or REDUCED PRICE eligibility is confirmed through direct verification with SNAP/TANF/FDPIR/MEDICAID as of November 15th	0	0

5-8: Results of Verification by Original Benefit Type  
 For each original benefit type (A, B, & C), report the number of applications and students as of November 15th for each result category (1, 2, 3, & 4). Do NOT include students and applications already reported in 5-7A or 5-7B.

A. FREE-Categorically Eligible Certified as FREE based on SNAP/TANF/FDPIR documentation (e.g. case number) on application			B. FREE-Income Certified as FREE based on income/household size application			C. REDUCED PRICE-Income Certified as REDUCED PRICE based on income/household size application		
Result Category	a. Applications	b. Students	Result Category	a. Applications	b. Students	Result Category	a. Applications	b. Students
1. Responded, NO CHANGE:	0	0	1. Responded, NO CHANGE:	0	0	1. Responded, NO CHANGE:	0	0
2. Responded, Changed to REDUCED PRICE:	0	0	2. Responded, Changed to REDUCED PRICE:	0	0	2. Responded, Changed to FREE:	0	0
3. Responded, Changed to PAID:	0	0	3. Responded, Changed to PAID:	0	0	3. Responded, Changed to PAID:	0	0
4. NOT Responded, Changed to PAID:	0	0	4. NOT Responded, Changed to PAID:	0	0	4. NOT Responded, Changed to PAID:	0	0

VC-1: Total questionable applications verified for cause (Enter "N/A" if not applicable): Report the number of applications as of November 15th verified for cause in addition to the verification requirement.	0
---	---

Page: 2 of 2

## Reapplying After Verification

After the Verification process is complete, a student may submit a SECOND application for Free and Reduced Price Meals for various reasons. Even though the first application determined via verification that the student was not eligible for benefits at the time the application was submitted, life changes in the student’s circumstances may now qualify the student for Free or Reduced Price meals. Prior to approving the SECOND application for free or reduced benefits the Household must submit documents to verify their new status.

The following example is how to handle this situation in PrimeroEdge.

### New Application for Free & Reduced Meals

Our student, Emily, applies for Free or Reduced Price Meals through PrimeroEdge.

1. Emily submits an application—either a paper application that is scanned, entered through the district’s Online Applications website, or entered by the Central Office through Manual Entry on the Applications menu into PrimeroEdge.
2. The application is validated and Free & Reduced Meal Eligibility is determined as “Reduced”.
3. Emily’s application is sampled for verification or added by clicking **Add for Verification** in the Validation Workspace. See page 162.

Two letters are sent requesting proof of income. No response is received by the stated due date in the notification letters and the Eligibility status changes to “Paid”. The length of time that this process takes depends on each district’s procedures. See USDA Guidelines to determine when letters should be sent.

The screenshot displays the PrimeroEdge application interface. On the left is a scanned application form for Emily, and on the right is a digital data entry table for household members.

**Application Form Details:**

- Application #: 2236 (1 of 1) | Batch #: 146
- Student ID: 1471
- State of Pennsylvania | Apply online at: <https://www.paschoolmeals.com>
- STEP 1 — All Children in School in the Household
- Students listed: Emily (DOB: 080801), Jehab (DOB: 010803)
- STEP 2 — Assistance Programs: SNAP or TANF? (Yes/No)
- STEP 3 — All Household Member Income

**Household Members Table:**

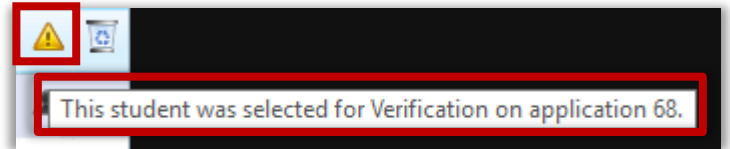
Name	Income Type	Income Amount
Member 1	Work Assistance	\$60.00(M) \$135.00(T)
Member 2	Work	\$150.00(W)
Member 3	Work	\$100.00(T)

### Reapplication for Free & Reduced Meals

The following scenario is only one example of a student reapplying after verification. A student may reapply at any time during the school year for various reasons.

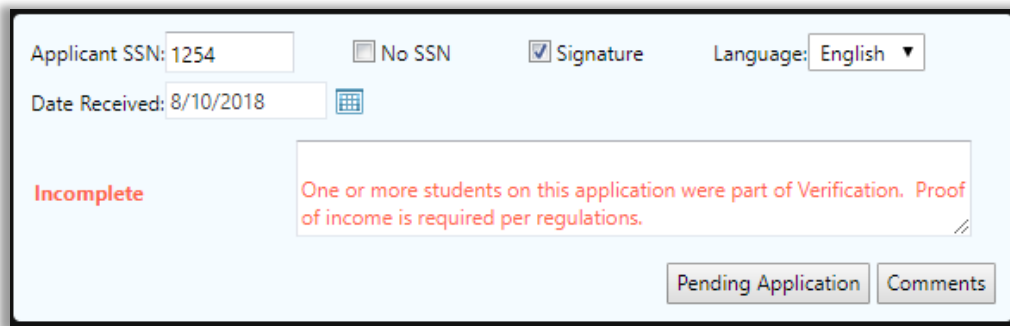
#### Scenario

- Emily’s household loses all income.
- Emily’s guardian completes a new application which is processed in PrimeroEdge.
- When the student is added to the new application an alert icon appears with the message “This student was selected for Verification on application ##”.

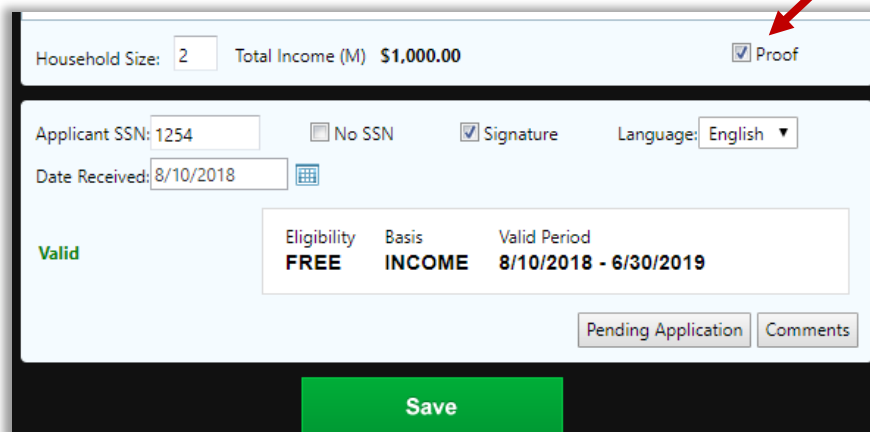


#### Message text

After adding household members, household size, applicant SSN, and signature. The system message appears stating “**Incomplete: One or more students on this application were part of Verification. Proof of income is required per regulations.**”



1. If Proof of Income **is provided** — Click **Proof** and continue validating the application, Click **Save**, and Notify the household of new status.



- If Proof of Income **is not provided** - Mark this application as “pending”, complete Add Pending Application popup by selecting “Reapplying after verification”, Add Comment, and Click **OK**. The window will close and print a Subsequent Notice from Verification Tracking for the first application.

The screenshot shows a dialog box titled "Add Pending Application". It contains a "Select a reason" section with several radio button options. The option "Reapplying after verification" is selected and highlighted with a red dashed box. Below this is a "Comment" field with the text "No response verification, sent letter." and a note "Limited to 500 Characters". At the bottom, there are "OK" and "Cancel" buttons, with the "OK" button also highlighted by a red dashed box. A "Close" button is visible in the bottom right corner of the dialog box.

- The new application is placed in the Smart Bin and processed as a pending application. Please refer to page 58 for Smart Bin instructions.
- ▲ If the **Save** button is clicked prior to making the application pending the system will warn the user that **“Saving this application as incomplete will deny the application.”**

The screenshot shows a warning dialog box with the following text: "Saving this application as incomplete will deny the application." Below this, it says "Click OK to continue or click Cancel to make changes." At the bottom, there are two buttons: "OK" and "Cancel".



- Print Subsequent Notice – Navigate to Verification>Tracking, select Verification Status filter then select **No Response or Verification Complete**. Identify the original application number of the reapplying household/student. Click **1<sup>st</sup> Notice Print or 1<sup>st</sup> Notice Email**, click **Notify Selected**, and print or email notification letter. Send notification to the parent/guardian requesting proof of income.

The screenshot shows the 'Tracking' interface. At the top, there are filters for 'Academic Year' (2018 - 2019), 'Verification Status' (Verification Complete), and 'Confirmation Status' (All). Below the filters is a table titled '2018 - 2019 Verification Complete Applications'. The table has columns for Application #, Eligibility, Basis, Type, Confirmation, 1st Notice Print, Follow Up Print, and Completion Notice Print. A red arrow points from the '1st Notice Print' column of application 68 to the 'Notify Selected' button.

Application #	Eligibility	Basis	Type	Confirmation	1st Notice Print	Follow Up Print	Completion Notice Print
67	Free	Income	Cause	Confirm	✓	✓	
68	Denied	Income	Cause	Confirmed	✓	✓	✓
69	Denied	Income	Cause	Confirmed	✓	✓	✓
70	Free	Income	Sampled	Confirm	✓	✓	

- When proof of income is received find the pending application in the Smart Bin by the new application number.

The screenshot shows the 'Smart Bin Pending Applications' interface. At the top, there are radio buttons for 'Pending Students', 'Pending Applications', and 'Deleted Applications'. Below is a table with columns for Application #, Reason, Date Added, User, and Comments. A red arrow points from the 'Validate' button below the table to the 'Validate' button in the next section.

Application #	Reason	Date Added	User	Comments
64	No Signature	7/19/2018 10:36:00 AM	Keisha Larkin	parent didnt sign
72	Restored Application	8/9/2018 9:32:00 AM	Daniel Todd	Deleted App Restored
77	Reapplying after verification	8/10/2018 2:17:00 AM	Daniel Todd	No response verifica...

- Click **Validate**, the application validation window will appear.
- Click **Proof** and continue validating the application, Click **Save**, and Notify the household of new status.
- See page 55 for instruction on how to **Notify** households of application results.

The screenshot shows the application validation window. It includes fields for 'Household Size' (2), 'Total Income (M)' (\$1,000.00), 'Applicant SSN' (1596), 'Date Received' (8/10/2018), and 'Language' (English). There are checkboxes for 'Proof', 'Signature', and 'No SSN'. A summary box shows 'Valid' status with 'Eligibility: FREE', 'Basis: INCOME', and 'Valid Period: 8/10/2018 - 6/30/2019'. At the bottom, there is a 'Save' button and buttons for 'Delete', 'Pending Application', and 'Comments\*'. A red arrow points from the 'Proof' checkbox to the 'Save' button.

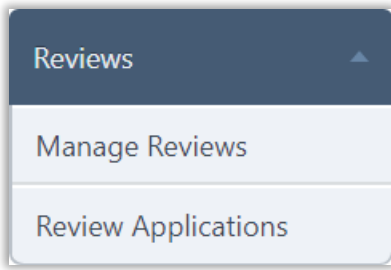


*« This page intentionally left blank.»*





## Chapter 8: Reviews

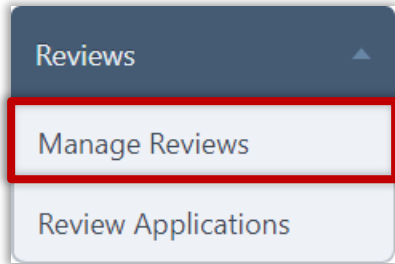


The **Reviews** menu (eighth menu in Student Eligibility module) offers two selections to allow state auditors access to all applications submitted to the SFA.

In this chapter you will learn how to:

- Set up and manage access for state auditors to applications.
- Review applications for compliance with annual review guidelines.

## Manage Reviews



**Manage Reviews** sets up or removes auditors who review Free & Reduced Eligibility data in PrimeroEdge.

The screenshot shows the 'Manage Reviews' interface. At the top, there is a dark blue header with the text 'Manage Reviews'. Below the header, there is a section for 'Academic Year' with a dropdown menu set to '2012 - 2013' and an 'Apply' button. Below this is a table titled 'Auditors' with an 'Add ...' button in the top right corner. The table has six columns: 'User Name', 'Level', 'Sites', 'Date Range', 'Edit', and 'Delete'. There are three rows of data in the table.

User Name	Level	Sites	Date Range	Edit	Delete
Alexander [redacted]	STATE	[redacted] ELEMENTARY SCHOOL	01/03/2013 - 02/09/2013	[edit icon]	[delete icon]
Cybersoft Support	STATE	[redacted] ELEMENTARY SCHOOL	12/23/2012 - 01/09/2013	[edit icon]	[delete icon]
Alexander [redacted]	STATE	[redacted] MIDDLE SCHOOL	12/14/2012 - 03/14/2013	[edit icon]	[delete icon]

**Add Auditor**

**To add an auditor**

1. Click **Add**.
2. Select a User, and a Start Date and End Date.

The screenshot shows a dialog box titled "Add / Edit Auditor". It contains the following fields and controls:

- User:** A dropdown menu with "Bob Smith - INTERNAL" selected.
- Start Date:** A text input field containing "2/2/2018" with a calendar icon to its right.
- End Date:** A text input field containing "2/23/2018" with a calendar icon to its right.
- Save:** A button with a mouse cursor pointing to it.
- Close:** A button located at the bottom right of the dialog box.

3. Click **Save** and then click **Close**.

The screenshot shows the "Manage Reviews" interface. At the top, there is an "Academic Year" dropdown menu set to "2017 - 2018" and an "Apply" button. Below this is a section titled "Auditors" with an "Add ..." button. The auditors are listed in a table:

User Name	Level	Date Range	Edit	Delete
Bob Smith	INTERNAL	02/02/2018 - 02/23/2018		

## Updating Auditor Details

### To update auditor details

1. Click **Edit** (✎) in an Auditor listing.

The screenshot shows a dialog box titled "Add / Edit Auditor". It contains the following fields and controls:

- User:** A dropdown menu currently showing "Bob Smith - INTERNAL".
- Start Date:** A text input field containing "3/1/2018" with a calendar icon to its right.
- End Date:** A text input field containing "4/30/2018" with a calendar icon to its right.
- Save:** A button located below the date fields, with a mouse cursor pointing to it.
- Close:** A button located at the bottom right of the dialog box.

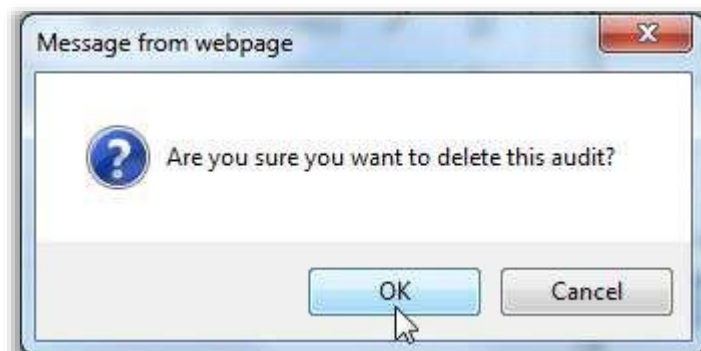
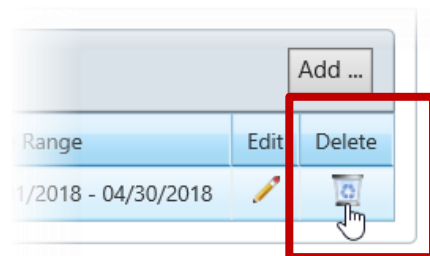
2. Select new review dates.
3. Click **Save** and then click **Close**.

- ▲ Only auditor data for the current Academic Year can be changed. Auditor records for prior years cannot be changed.

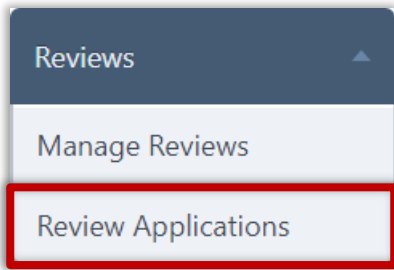
## Delete Auditor

### To delete an auditor

1. Click **Delete** (🗑️) in an Auditor listing.
2. Click **OK** in the message popup.



## Review Applications



**Review Applications** allows you to review applications included in an audit for a selected school year. Application details as well as summary statistics can be viewed.

**Review Applications**

Academic Year: 2017 - 2018

Audits		
Site	Site Code	# of Applications
District Name: COUNTY SCHOOLS; Date Range: 09/28/2017 - 02/28/2018		
<b>Review Applications</b>		
ELEMENTARY SCHOOL	005	43
MIDDLE SCHOOL	301	21
MIDDLE SCHOOL	302	100
COUNTY ALTERNATIVE HIGH SCHOOL	502	9
COUNTY ALTERNATIVE MIDDLE SCHOOL	309	12
ELEMENTARY SCHOOL	290	19
ELEMENTARY SCHOOL	218	17
ELEMENTARY SCHOOL	221	9
ELEMENTARY SCHOOL	224	12
ELEMENTARY SCHOOL	233	24
ELEMENTARY SCHOOL	236	9
ELEMENTARY SCHOOL	239	0
ELEMENTARY SCHOOL	242	9
HIGH SCHOOL	560	34
MIDDLE SCHOOL	310	11
ELEMENTARY SCHOOL	251	6
ELEMENTARY SCHOOL	254	0
ELEMENTARY SCHOOL	263	8
MIDDLE SCHOOL	308	3
ELEMENTARY SCHOOL	269	3
ELEMENTARY SCHOOL	272	0
ELEMENTARY SCHOOL	281	6
ELEMENTARY SCHOOL	285	0
ELEMENTARY	292	0
ELEMENTARY SCH	291	6

Review Applications

To review applications

1. Select an Academic Year and click **Apply**.
2. Click the [Review Applications](#) link.
  - ▲ The current date must be within the date range of the review created in Manage Reviews to be able to view application data.

The screenshot shows the 'Review Applications' interface. At the top, there is a dropdown for 'Academic Year' set to '2017 - 2018' and an 'Apply' button. Below this is a section titled 'Audits' with a table. The table has columns for 'Site', 'Site Code', and '# of Applications'. A filter is applied: 'District Name: COUNTY SCHOOLS; Date Range: 09/28/2017 - 02/28/2018'. The table lists several schools:

Site	Site Code	# of Applications
ELEMENTARY SCHOOL	005	43
MIDDLE SCHOOL	301	21
MIDDLE SCHOOL	302	100
COUNTY ALTERNATIVE HIGH SCHOOL	502	9
COUNTY ALTERNATIVE MIDDLE SCHOOL	309	12

Summary tab

The Summary tab provides totals for all applications and students, and the number of students for each eligibility.

The screenshot shows the 'Summary' tab of the application review interface. At the top, it displays 'SFA/Sponsor: COUNTY SCHOOLS', 'Sites: -- ALL --', and 'As Of: 2/2/2018'. There is a 'Generate Statistical Sample' button. Below this are tabs for 'Summary', 'Applications', 'Roster', 'Sample - 95%', and 'Sample - 99%'. The 'Summary' tab is active and shows the following totals:

Total Applications:	105
Total Free Students:	68
Total Reduced Students:	33
Total Paid Students:	14182
Total Students:	14283

**Applications tab**

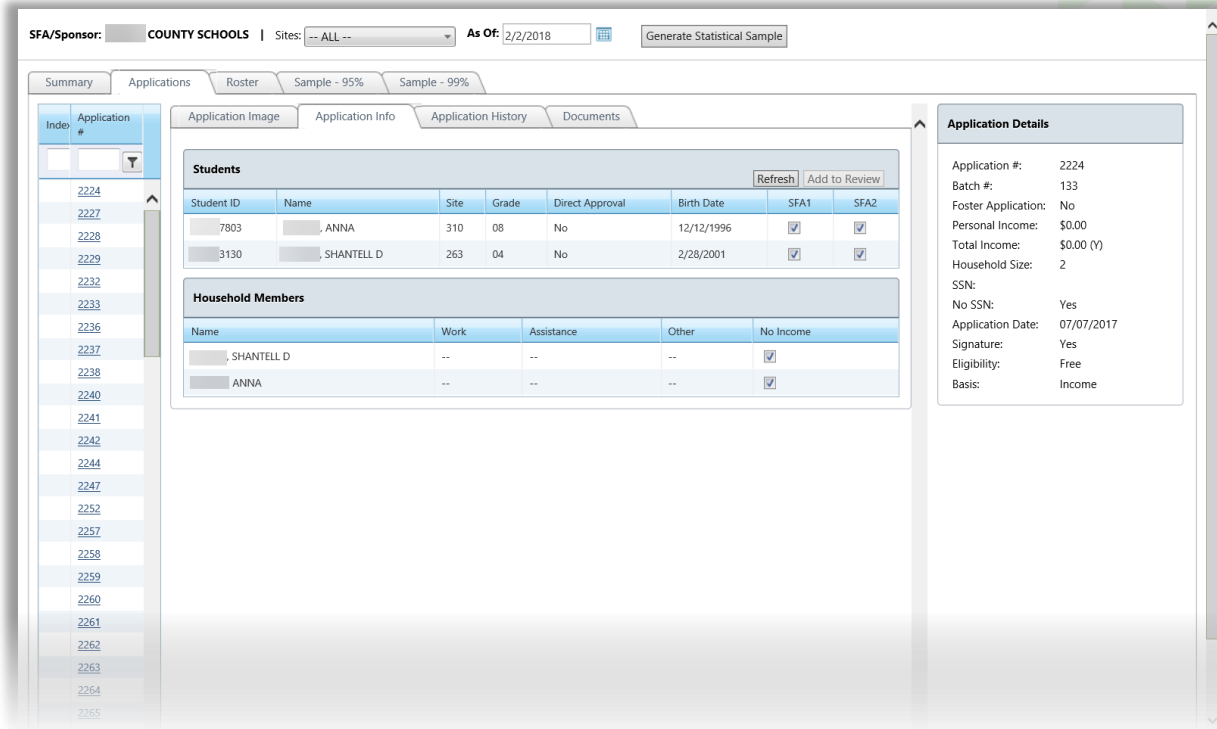
The Applications tab lists links to all applications and offers three sub-tabs of application information.

**Application Image** sub-tab displays application images and lists application details.

**To print the application**

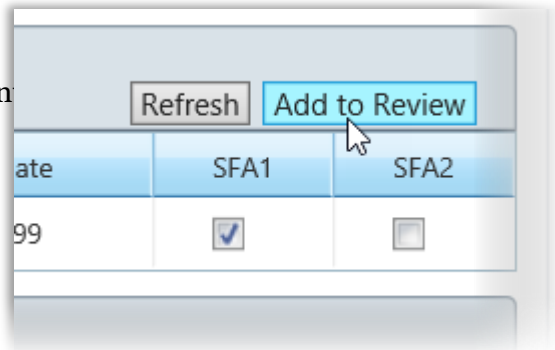
- Click **Print**.

**Application Info** sub-tab lists all students and household members on a selected application



**To add a student to an SFA review form**

1. Select SFA1 or SFA2 (or both) in a student
2. Click **Add to Review**.





**Application History** sub-tab displays application status history and lists application details.

The screenshot displays the 'Application History' sub-tab. At the top, there are filters for 'SFA/Sponsor: COUNTY SCHOOLS', 'Sites: -- ALL --', and 'As Of: 2/2/2018'. Below the filters are tabs for 'Summary', 'Applications', 'Roster', 'Sample - 95%', and 'Sample - 99%'. The 'Application History' sub-tab is active, showing a table of application status history. The table has three columns: 'Application Status', 'Date / Time', and 'Official'. The entries show various statuses like 'Notified', 'Processed', and 'Completed' with corresponding dates and times, all from 'Cybersoft Support'. To the right of the table is an 'Application Details' panel for application # 2224, listing details such as Batch # (133), Foster Application (No), Personal Income (\$0.00), Total Income (\$0.00 (Y)), Household Size (2), SSN (No), No SSN (Yes), Application Date (07/07/2017), Signature (Yes), Eligibility (Free), and Basis (Income). Below the table is an 'Application Comments' section with a text area containing the comment '12/13/2017 5:08:55 PM Cybersoft Support'.

Application Status	Date / Time	Official
Notified	12/13/2017 5:13:51 PM	Cybersoft Support
Processed	12/13/2017 5:08:57 PM	Cybersoft Support
Notified	12/13/2017 5:07:48 PM	Cybersoft Support
Processed	12/13/2017 5:07:36 PM	Cybersoft Support
Processed	12/13/2017 5:05:32 PM	Cybersoft Support
Notified	8/1/2017 5:07:10 PM	Cybersoft Support
Notified	8/1/2017 5:07:10 PM	Cybersoft Support
Notified	8/1/2017 4:34:34 PM	Cybersoft Support
Notified	8/1/2017 4:34:34 PM	Cybersoft Support
Notified	8/1/2017 4:33:21 PM	Cybersoft Support
Notified	8/1/2017 4:33:21 PM	Cybersoft Support
Notified	8/1/2017 4:33:19 PM	Cybersoft Support
Notified	8/1/2017 4:33:19 PM	Cybersoft Support
Notified	7/25/2017 1:47:08 PM	Cybersoft Support
Notified	7/25/2017 1:46:29 PM	Cybersoft Support
Notified	7/25/2017 1:42:52 PM	Cybersoft Support
Notified	7/25/2017 1:41:42 PM	Cybersoft Support
Notified	7/25/2017 11:22:08 AM	Cybersoft Support
Notified	7/13/2017 11:14:08 AM	Cybersoft Support
Processed	7/7/2017 12:07:37 AM	Cybersoft Support

**To work with the Application History subtab**

- Use the scroll bar to move through history listings.

**Documents** sub-tab displays scanned-document images and lists application details.

The screenshot displays the 'Documents' sub-tab in the Student Eligibility System. The interface includes a navigation bar at the top with 'SFA/Sponsor: COUNTY SCHOOLS', 'Sites: -- ALL --', 'As Of: 2/2/2018', and a 'Generate Statistical Sample' button. Below the navigation bar are tabs for 'Summary', 'Applications', 'Roster', 'Sample - 95%', and 'Sample - 99%'. The 'Documents' tab is active, showing a list of application numbers on the left (2224 to 2269) and a large scanned document in the center. The document is a 'State of Pennsylvania Make and/or Special Mile Program Application 2015-2016' for 'Emily' and 'Jahel'. It includes sections for 'STEP 1 - All Children in School in the Household', 'STEP 2 - Assistance Programs', 'STEP 3 - All Household Member Income', and 'STEP 4 - Contact Information and Adult Signature'. The document also features a 'Public Assistance / Child Support / Alimony' section with handwritten entries '135' and 'X'. On the right side of the interface, there is an 'Application Details' panel with the following information:

Application Details	
Application #:	2236
Batch #:	146
Foster Application:	No
Personal Income:	\$0.00
Total Income:	\$14,160.00 (Y)
Household Size:	3
SSN:	
No SSN:	Yes
Application Date:	08/15/2017
Signature:	Yes
Eligibility:	Free
Basis:	Income

### To scan a document

- Place the document in the scanner and click **Scan**.

### To display a document in the image window

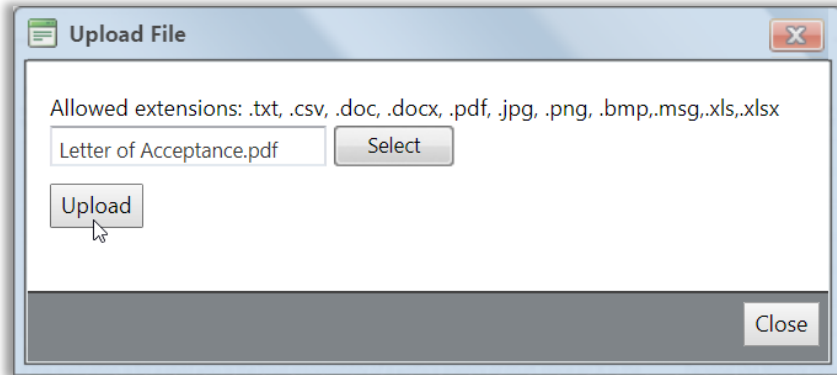
- Click a document name link in the **Documents** group.

### To magnify an area of a digital image

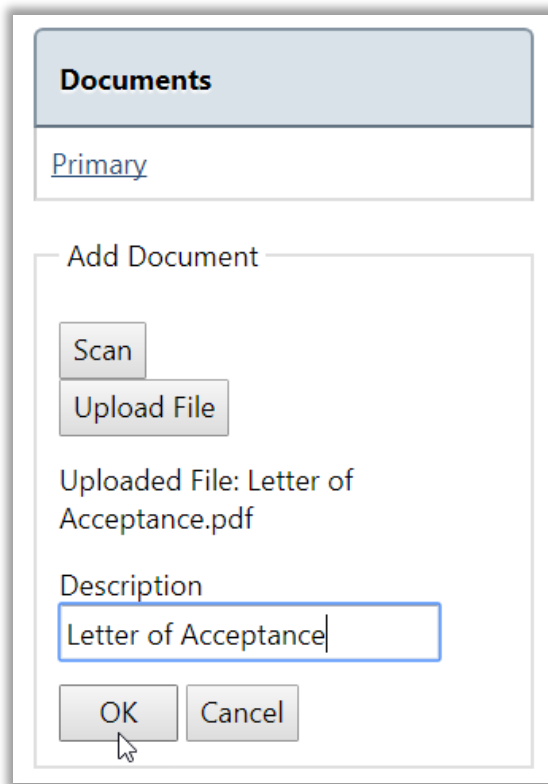
- Hover the mouse cursor over the image.

**To upload a document**

1. Click Upload File.
2. Click **Select**, choose a file, and click **Open**.



3. Click **Upload**.



4. Enter a name for the uploaded file in Description and click **OK**.

Roster-tab

The Roster tab displays a list of all students by grade whose application has been received for processing by the SFA.

Student Name	Student ID	Application #	Entry Method	Status	Reason	Start Date	Grade
[REDACTED], MICHAEL C	[REDACTED]0523	<a href="#">2363</a>	Manual	Free	INCOME	01/31/2018	12
[REDACTED], CIERRA D	[REDACTED]0786	<a href="#">2352</a>	Manual	Free	INCOME	01/08/2018	
[REDACTED], CATHERINE D	[REDACTED]7442	<a href="#">2351</a>	Manual	Free	INCOME	01/04/2018	07
[REDACTED], SHAWN	[REDACTED]5673	<a href="#">2350</a>	Manual	Free	INCOME	01/05/2018	03
[REDACTED], SKYLAR C	[REDACTED]4512	<a href="#">2349</a>	Manual	Free	INCOME	01/02/2018	KG
[REDACTED], CORTNEY M	[REDACTED]1784	<a href="#">2348</a>	Manual	Free	INCOME	01/02/2018	04
[REDACTED], LYNDSEY C	[REDACTED]8225	<a href="#">2348</a>	Manual	Free	INCOME	01/02/2018	KG
[REDACTED], ASHLEY N	[REDACTED]1385	<a href="#">2347</a>	Manual	Reduced	INCOME	12/17/2017	07
[REDACTED], HALEA R	[REDACTED]1172	<a href="#">2346</a>	Manual	Reduced	VERIFICATION	12/18/2017	01
Bailesh	[REDACTED]7	<a href="#">2345</a>	Manual	Reduced	INCOME	12/25/2017	08
[REDACTED], TALIB A	[REDACTED]0978	<a href="#">2344</a>	Manual	Reduced	INCOME	11/29/2017	01
[REDACTED], MARCUS B	[REDACTED]7579	<a href="#">2343</a>	Manual	Free	INCOME	11/29/2017	03
[REDACTED], REBECCA D	[REDACTED]5545	<a href="#">2342</a>	Manual	Free	INCOME	11/29/2017	KG
[REDACTED], JORDAN T	[REDACTED]2745	<a href="#">2341</a>	Manual	Free	INCOME	11/29/2017	04
[REDACTED], ANTHONY W	[REDACTED]9682	<a href="#">2340</a>	Manual	Free	INCOME	11/29/2017	01
[REDACTED], DYLAN J	[REDACTED]3941	<a href="#">2339</a>	Manual	Free	INCOME	11/29/2017	KG
[REDACTED], JAY VON	[REDACTED]3213	<a href="#">2338</a>	Manual	Free	INCOME	12/05/2017	KG
[REDACTED], RILEY C	[REDACTED]2947	<a href="#">2337</a>	Manual	Free	INCOME	11/28/2017	07
[REDACTED], GARRETT R	[REDACTED]3015	<a href="#">2336</a>	Manual	Free	INCOME	11/21/2017	06
[REDACTED], GABRIELLA E	[REDACTED]2119	<a href="#">2332</a>	Manual	Reduced	INCOME	10/29/2017	KG

To export the roster list

1. Click Export to Excel.
2. Click **Open**.

**Sample – 95% Tab**

The Sample – 95% tab lists all students included in the 95% confidence sample. Use this list to track all students whose applications have been reviewed. Use the view options to show All, Reviewed, or Not Reviewed students.

**View options**

SFA/Sponsor: COUNTY SCHOOLS | Sites: -- ALL -- | As Of: 2/2/2018 | Generate Statistical Sample

Summary Applications Roster Sample - 95% Sample - 99%

95% Confidence Factor: (Universe: 94, Sample Size: 94, Starting Point: 0, Interval: 1) Generated on: 12/19/2017 As of: 12/19/2017  All  Reviewed  Not Reviewed [Export to Excel](#)

Student Name	Student ID	Application #	Entry Method	Status	Reason	Start Date	Grade	Reviewed
ASHLEY N	1385	2347	Manual	Reduced	INCOME	12/17/2017	07	<input type="checkbox"/>
HALEA R	1172	2346	Manual	Reduced	VERIFICATION	12/18/2017	01	<input type="checkbox"/>
Bailesh	37	2345	Manual	Free	INCOME	12/15/2017	08	<input type="checkbox"/>
TALIB A	0978	2344	Manual	Reduced	INCOME	11/29/2017	01	<input type="checkbox"/>
MARCUS B	7579	2343	Manual	Free	INCOME	11/29/2017	03	<input type="checkbox"/>
REBECCA D	5545	2342	Manual	Free	INCOME	11/29/2017	KG	<input type="checkbox"/>
JORDAN T	2745	2341	Manual	Free	INCOME	11/29/2017	04	<input type="checkbox"/>
ANTHONY W	9682	2340	Manual	Free	INCOME	11/29/2017	01	<input type="checkbox"/>
DYLAN J	3941	2339	Manual	Free	INCOME	11/29/2017	KG	<input type="checkbox"/>
JAY VON	3213	2338	Manual	Free	INCOME	12/05/2017	KG	<input type="checkbox"/>
RILEY C	2947	2337	Manual	Free	INCOME	11/28/2017	07	<input type="checkbox"/>
GARRETT R	3015	2336	Manual	Free	INCOME	11/21/2017	06	<input type="checkbox"/>
GABRIELLA E	2119	2332	Manual	Reduced	INCOME	10/29/2017	KG	<input type="checkbox"/>
OLIVIA G	0104	2331	Manual	Reduced	INCOME	10/29/2017	01	<input type="checkbox"/>
HAMZEH	1696	2330	Manual	Reduced	INCOME	10/29/2017	01	<input type="checkbox"/>
ZACKERY A	0773	2329	Manual	Reduced	INCOME	10/29/2017	05	<input type="checkbox"/>
MARSHALL T	0453	2328	Manual	Free	INCOME	11/08/2017		<input type="checkbox"/>
HUNTER L	5531	2327	Manual	Free	INCOME	10/29/2017	05	<input type="checkbox"/>
MICHAELA E	0095	2326	Manual	Reduced	INCOME	10/29/2017	01	<input type="checkbox"/>
ALEXIA R	8715	2325	Manual	Reduced	INCOME	10/29/2017	03	<input type="checkbox"/>

Page size: 20 | 89 items in 5 pages

**To mark a reviewed student**

- Click the Reviewed checkbox in a student listing.

**To export the 95% Sample list**

1. Click **Export to Excel**.
2. Click **Open**.

## Sample – 99% Tab

The Sample – 99% tab lists all students included in the 99% confidence sample. Use this list to track all students whose application has been reviewed. Use the view options to show All, Reviewed, or Not Reviewed students.

View options

**99% Confidence Factor: (Universe: 94, Sample Size: 94, Starting Point: 0, Interval: 1) Generated on: 12/19/2017 As of: 12/19/2017**

View options:  All  Reviewed  Not Reviewed [Export to Excel](#)

Student Name	Student ID	Application #	Entry Method	Status	Reason	Start Date	Grade	Reviewed
ASHLEY N	1385	2347	Manual	Reduced	INCOME	12/17/2017	07	<input type="checkbox"/>
HALEA R	1172	2346	Manual	Reduced	VERIFICATION	12/18/2017	01	<input type="checkbox"/>
Bailesh	7	2345	Manual	Free	INCOME	12/15/2017	08	<input type="checkbox"/>
TALIB A	0978	2344	Manual	Reduced	INCOME	11/29/2017	01	<input type="checkbox"/>
MARCUS B	7579	2343	Manual	Free	INCOME	11/29/2017	03	<input type="checkbox"/>
REBECCA D	5545	2342	Manual	Free	INCOME	11/29/2017	KG	<input type="checkbox"/>
JORDAN T	2745	2341	Manual	Free	INCOME	11/29/2017	04	<input type="checkbox"/>
ANTHONY W	9682	2340	Manual	Free	INCOME	11/29/2017	01	<input type="checkbox"/>
DYLAN J	3941	2339	Manual	Free	INCOME	11/29/2017	KG	<input type="checkbox"/>
JAY VON	3213	2338	Manual	Free	INCOME	12/05/2017	KG	<input type="checkbox"/>
RILEY C	2947	2337	Manual	Free	INCOME	11/28/2017	07	<input type="checkbox"/>
GARRETT R	3015	2336	Manual	Free	INCOME	11/21/2017	06	<input type="checkbox"/>
GABRIELLA E	2119	2332	Manual	Reduced	INCOME	10/29/2017	KG	<input type="checkbox"/>
OLIVIA G	0104	2331	Manual	Reduced	INCOME	10/29/2017	01	<input type="checkbox"/>
HAMZEH	1696	2330	Manual	Reduced	INCOME	10/29/2017	01	<input type="checkbox"/>
ZACKERY A	0773	2329	Manual	Reduced	INCOME	10/29/2017	05	<input type="checkbox"/>
MARSHALL T	0453	2328	Manual	Free	INCOME	11/08/2017		<input type="checkbox"/>
HUNTER L	5531	2327	Manual	Free	INCOME	10/29/2017	05	<input type="checkbox"/>
MICHAELA E	0095	2326	Manual	Reduced	INCOME	10/29/2017	01	<input type="checkbox"/>
ALEXIA R	8715	2325	Manual	Reduced	INCOME	10/29/2017	03	<input type="checkbox"/>

Page size: 20 89 items in 5 pages

### To mark a reviewed student

- Click the Reviewed checkbox in a student listing.

### To export the 95% Sample list

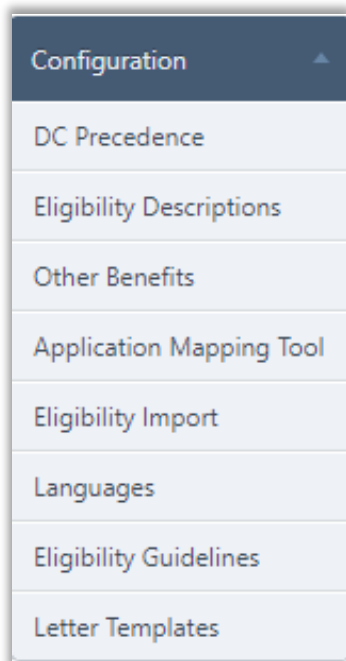
1. Click **Export to Excel**.
2. Click **Open**.



*« This page intentionally left blank »*



## Chapter 9: Configuration



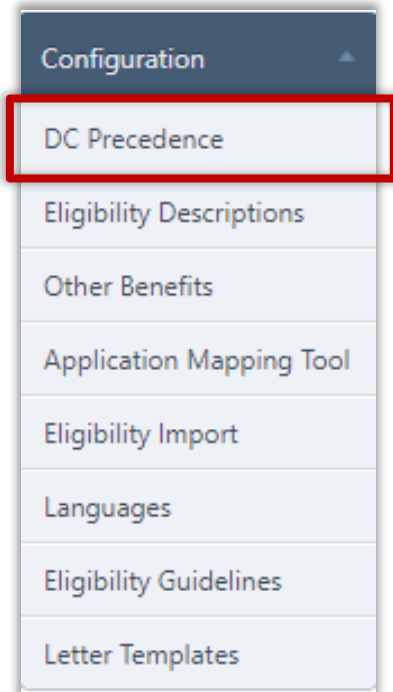
The **Configuration** menu (eight menu in Student Eligibility menu) offers selections to manage a variety of tools for other benefits, letter templates, eligibility guidelines, and more.

In this chapter you will learn how to:

- View precedence set for DC matches.
- Add, change, and remove other benefits.
- Use the Mapping Tool to manage application form updates.
- View, update, and change eligibility guidelines.
- View and update Letter Templates.
- Import Eligibilities
- View and update Languages visible in the system



DC Precedence



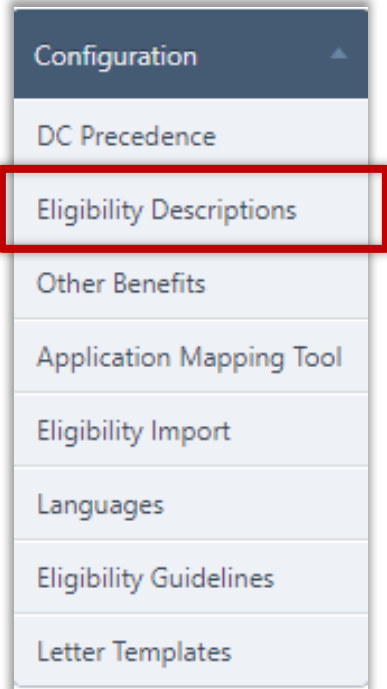
User **DC Precedence** to set the precedence in which DC matches are made from different eligibility types.

When precedence is set by the Central realm, districts have 'view only' permissions as shown in the example below.

DC Precedence



Direct Approval & Direct Certification Precedence				
Reason	Precedence	Updated By	Updated On	
<b>Level 1 (Direct Certification)</b>				
DC SNAP	1			
<b>Level 2 (Direct Certification)</b>				
DC FDPPIR	2	Cybersoft Support	2/2/2018	
DC TANF	3	Cybersoft Support	2/2/2018	
DC Medicaid	4	Cybersoft Support	2/2/2018	
DC Foster	5	Cybersoft Support	1/25/2018	
<b>Level 3 (Direct Approval)</b>				
Migrant	6			
Head Start	7			
Even Start	8	Cybersoft Support	10/25/2017	
Homeless	9	Cybersoft Support	10/25/2017	
Runaway	10			
RCCI	11			
Principal Approved	12			

















Eligibility Descriptions



**Eligibility Descriptions** manages the visibility and local description of Assistance Programs and Other Source Categorical direct approvals. Changes in this area will determine if your local descriptions of the direct approval methods are visible in application validation in PrimeroEdge and SchoolCafé eligibility.

**To change Local Description**

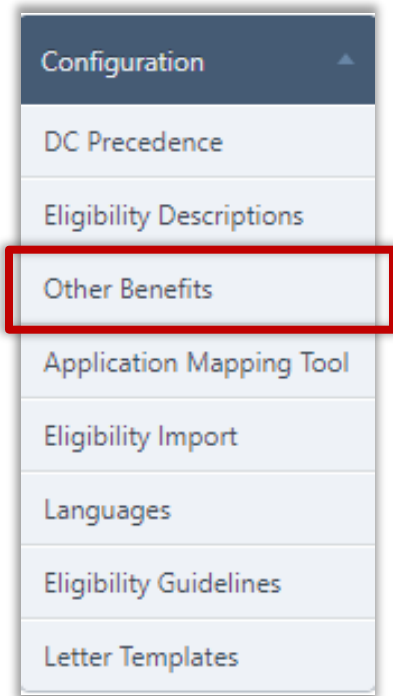
1. Click **Edit** (  ).
2. Enter a Local Description.
3. Click **Save** (  )

Eligibility Descriptions					
Assistance Programs					
USDA Description	Local Description	Visible 	Updated By	Updated On	Edit
SNAP	SNAP				
TANF	TANF				
Other Source Categorical					
USDA Description	Local Description	Visible 	Updated By	Updated On	Edit
Foster	Foster				
Head Start	Head Start/Early Start	<input checked="" type="checkbox"/>			 
Homeless	Homeless				
Migrant	Migrant				
Runaway	Runaway				

**To make Local Description Visible**

1. Click **Edit** (  ).
2. Click **Visible** (  ) box.
3. Click **Save** (  )

## Other Benefits



**Other Benefits** manages benefits displayed on the Review Application page of the Free & Reduced Meals Online Applications web site, or when adding optional information through the Validation Workspace (see page 28) when processing or adding new applications. These are benefits offered by your district about which parents may be interested in receiving more information.

## Other Benefits Display

The screenshot shows the 'schoolcafe' application interface. The top navigation bar includes 'Students', 'Assistance', 'Household', 'Review', 'Details', and 'Submit'. The left sidebar contains 'Dashboard', 'Benefits', 'Apply', 'Eligibility Info', 'Verification Response', and 'Support'. The main content area is titled 'Optional Info' and includes sections for 'Ethnicity', 'Racial Identity', 'Consent to Release Meal Eligibility', and 'Information Sharing'. The 'Other Benefits' field is currently empty and labeled 'Other Benefits - editable field - Anna'. The form has 'Previous' and 'Next' buttons at the bottom.

**Add Benefit**

**To add a new benefit**

4. Click **Add new record**.
5. Enter a Name and a short Description.
6. Select a Program and enter the Recipient Agency Code
7. Click **Update**.

Name	Description	Spanish Description	School Year	Delete
Health Care Plan	Health Care Plan		2017 - 2018	

**Other Benefits**

[+ Add new record](#)  Refresh

Name:   
Description:   
Spanish Description:

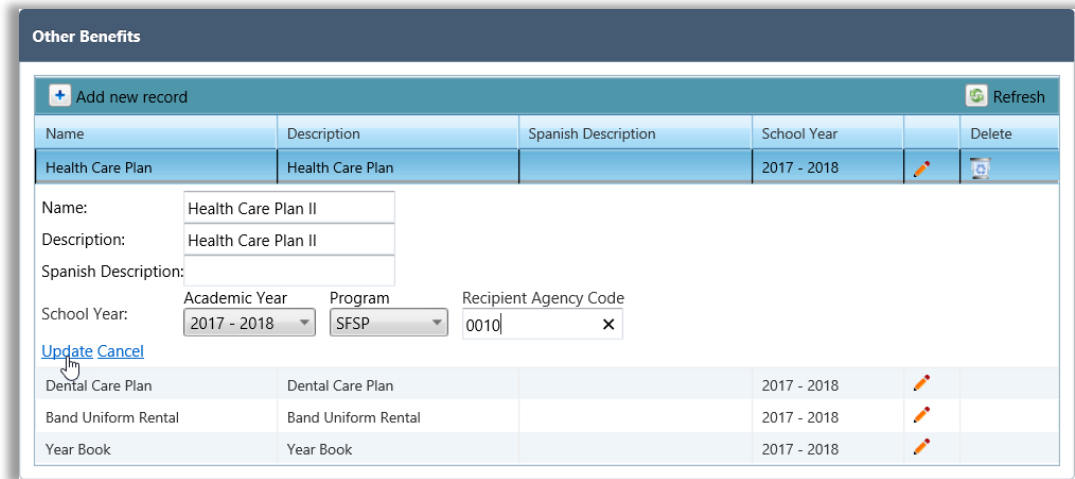
School Year: Academic Year:  Program:  Recipient Agency Code:

[Update](#) [Cancel](#)

Dental Care Plan	Dental Care Plan		2017 - 2018	
Band Uniform Rental	Band Uniform Rental		2017 - 2018	
Year Book	Year Book		2017 - 2018	

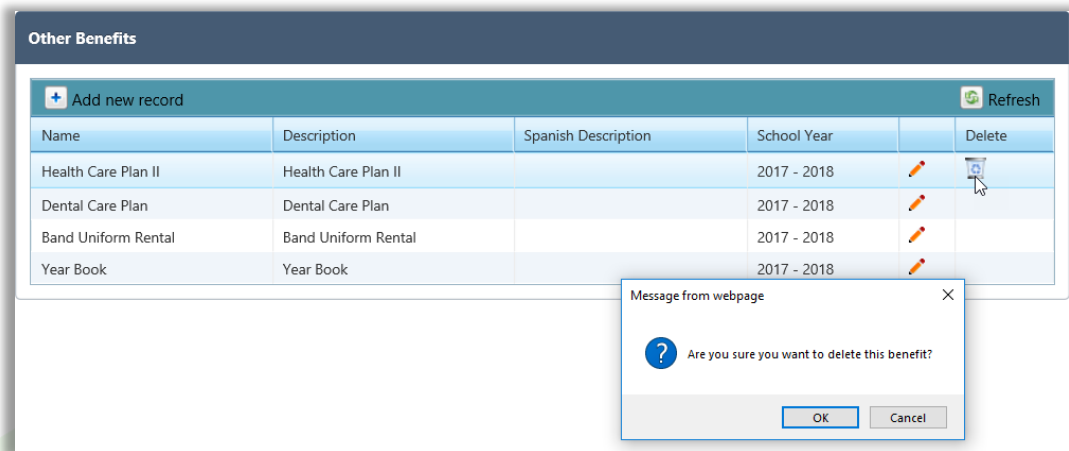
**To update a benefit**

1. Click **Edit** in a benefit listing.
2. Make changes to benefit information as needed.
3. Click **Update**.

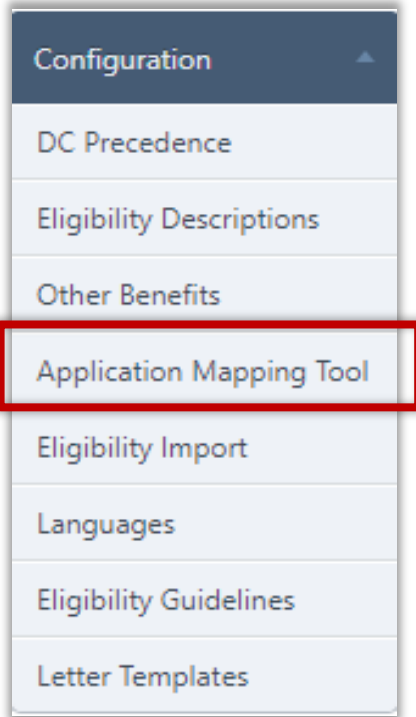


**To delete a benefit**

1. Click **Delete** in a benefit listing.
2. Click **OK** in the confirmation popup.



Application Mapping Tool



**Application Mapping Tool** allows you to fine tune your district’s application for Free and Reduced Price meals so that all required data is captured during application scan.

The Application Mapping Tool page offers three tabs:

- **Template** – lists all currently existing application images; provides a method to create a template from a last scanned application
  - ▲ The **Create** button becomes available after the Grace Period is set through the [System] module.
- **Reference Image** – zooms image areas for close inspection; scan to create a new application image.
- **Mapping** – create and modify mapped data areas on the application to be read and stored in PrimeroEdge.

**Tab 1: Template**

Template ID	Template Language	Status	
1471	English	Created	
<input type="text"/>	Spanish	N/A	Create
<input type="text"/>	Chinese	N/A	Create
<input type="text"/>	Vietnamese	N/A	Create
<input type="text"/>	Bengali	N/A	Create
<input type="text"/>	Gujarati	N/A	Create
<input type="text"/>	Portuguese	N/A	Create

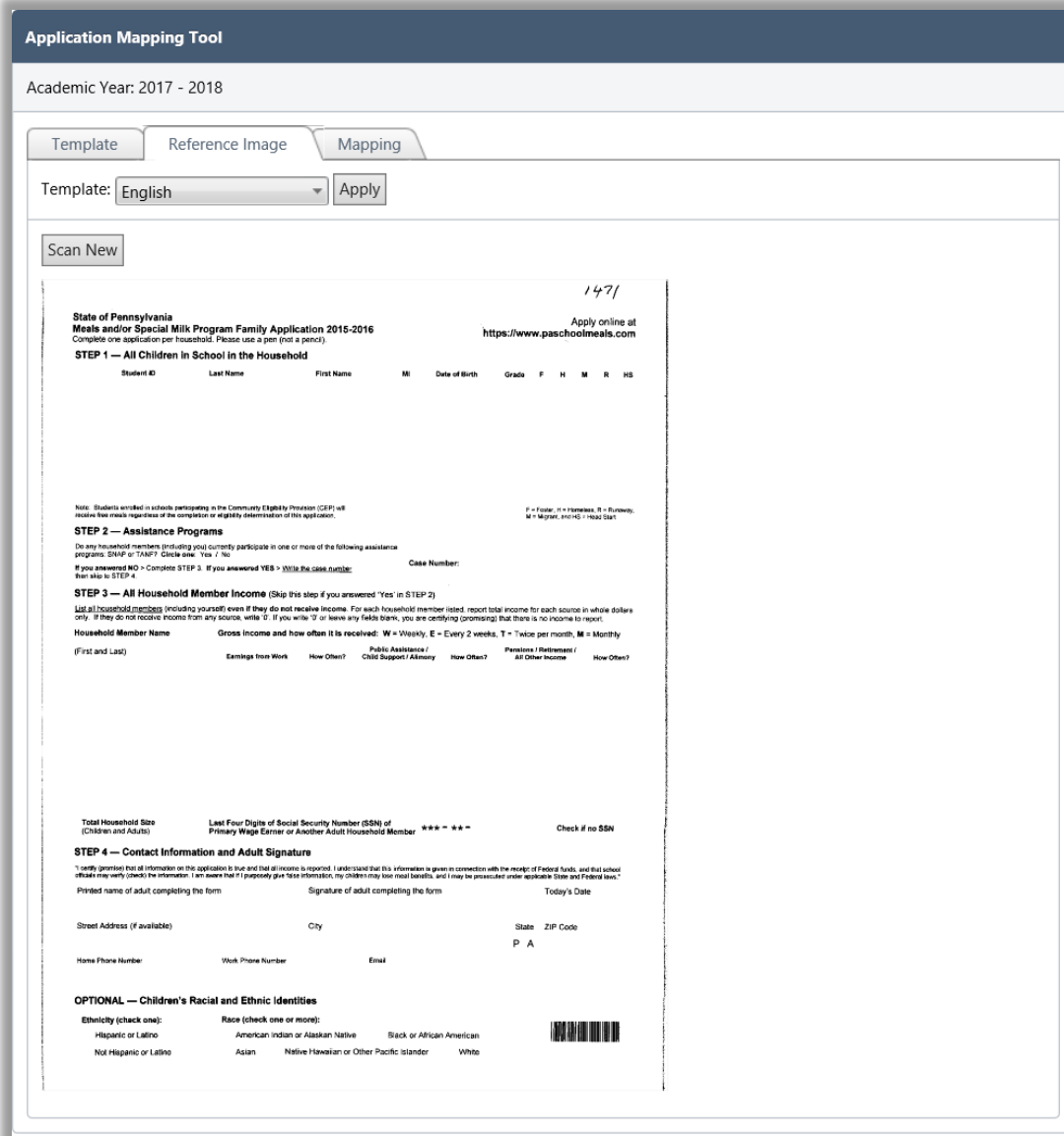
**To add a template**

1. Enter a Template ID in a template listing.
2. Click **Create** in the template listing.

**Tab 2: Reference Image**

A new image is created on the Reference Image tab or details of an existing image can be inspected.

Before scanning, you must have a scanner connected to your system and paper must be loaded into the scanner. If not, Internet Explorer stops when you start the scanning process. You must then restart IE and PrimeroEdge to continue.



**To scan a new image**

- Click Scan New.

**Tab 3: Mapping**

Mapping of the various areas of the application image takes place on the **Mapping** tab.

The screenshot shows the 'Application Mapping Tool' interface for the 'Academic Year: 2012 - 2013'. It includes tabs for 'Template', 'Reference Image', and 'Mapping'. The 'Mapping' tab is active, showing a form for 'Free and Reduced-Price Meals Household Application for 2012 - 2013'. The form is divided into several sections: PART 1 (Names of ALL Children in School), PART 2 (SNAP/TANF NUMBER), PART 3 (HOMELESS, MIGRANT, RUNAWAY), PART 4 (HOUSEHOLD MEMBERS AND GROSS INCOME FROM LAST MONTH), PART 5 (Signature and Social Security Number), PART 6 (Race and Ethnicity), and PART 7 (Other Benefits). A 'Zone Detail' panel on the right shows a magnified view of a selected area, displaying 'Free and Reduced-Price Meals Household Application for 2012 - 2013' and 'PART 1 - Names of ALL Children in School'. The 'Zone Detail' panel also shows 'Zone Name: -', 'Mouse Position: X= 586 Y= 372', and fields for 'X Coordinate', 'Y Coordinate', 'Width', and 'Height'. A 'Group Tools' panel at the bottom right contains buttons for 'Align Horizontally', 'Align Vertically', 'Same Width', 'Same Height', 'Commit', 'Discard', and 'Save & Close'. A 'Cancel' button is located at the bottom left of the main form.

Blue boxes are mapped data areas that are read and saved by PrimeroEdge

Zone Detail magnifies the area where the mouse cursor is located.

Group Tools modify two or more selected map boxes

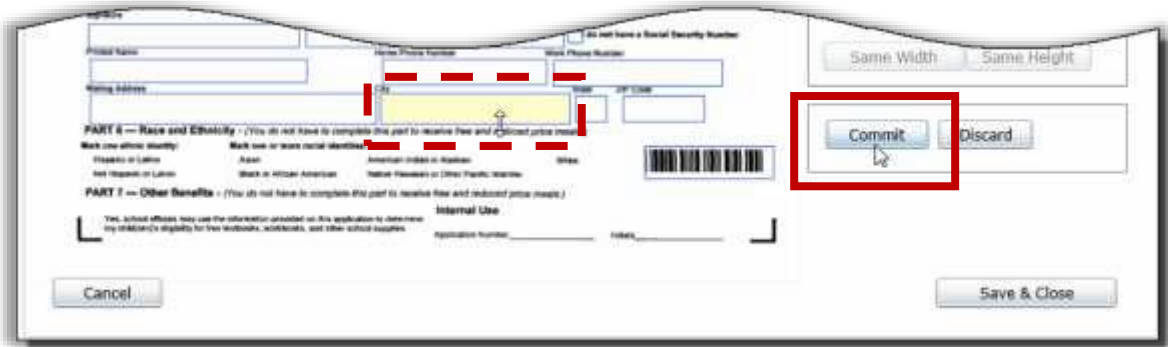
Click to save your last set of changes

Click to cancel your last set of changes



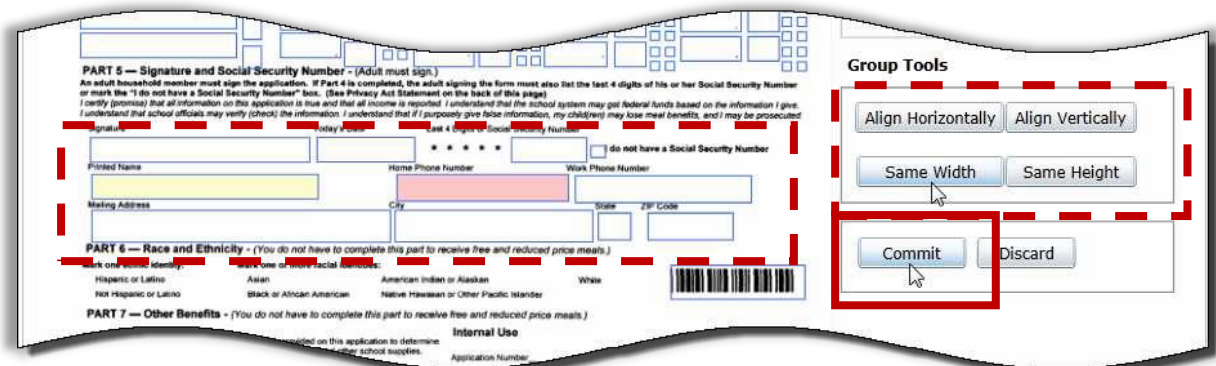
**To increase or decrease the size of the mapped box**

1. Click inside the mapped part box and click and drag the edge of the mapped box to expand or decrease the mapped box size.
2. **Commit** to save your changes, or click **Discard** your changes.



**To work with Group Tools**

1. Select two or more boxes with the mouse while holding down the Ctrl key.
2. Click a group tool to change the size or vertical/horizontal location of all mapped boxes relative to the first selected box.
3. Click **Commit** to save your changes, or click **Discard** your changes.



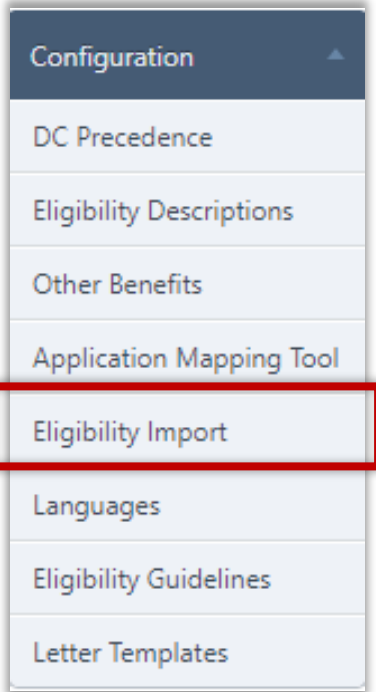
**To discard all changes and close the mapped image**

- Click **Cancel**.

**To save all changes and close the mapped image.**


- Click **Save & Close**.

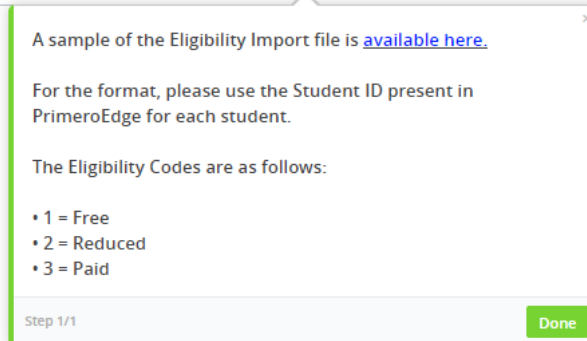
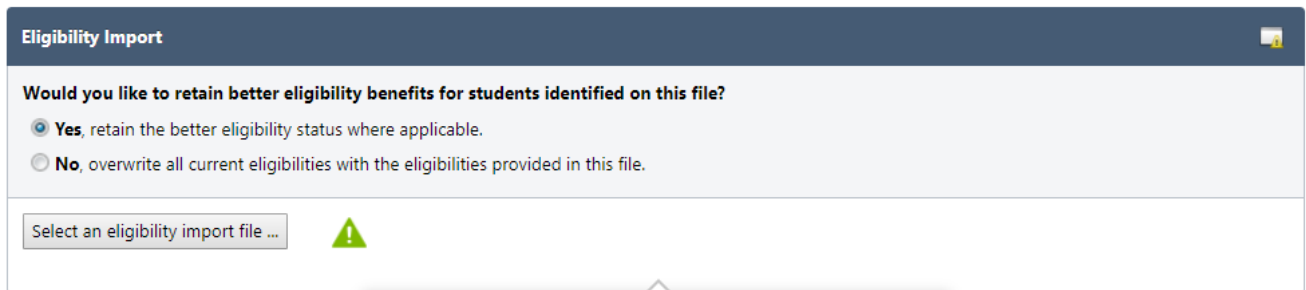
## Eligibility Imports



**Eligibility Imports** allows SFAs to update student eligibilities with data from a prior eligibility system or a parent district’s 3<sup>rd</sup> party system. The functionality will allow users to select if students will retain a better eligibility status or all current eligibilities will be overwritten with new eligibilities.

### To Import a Student Eligibility File

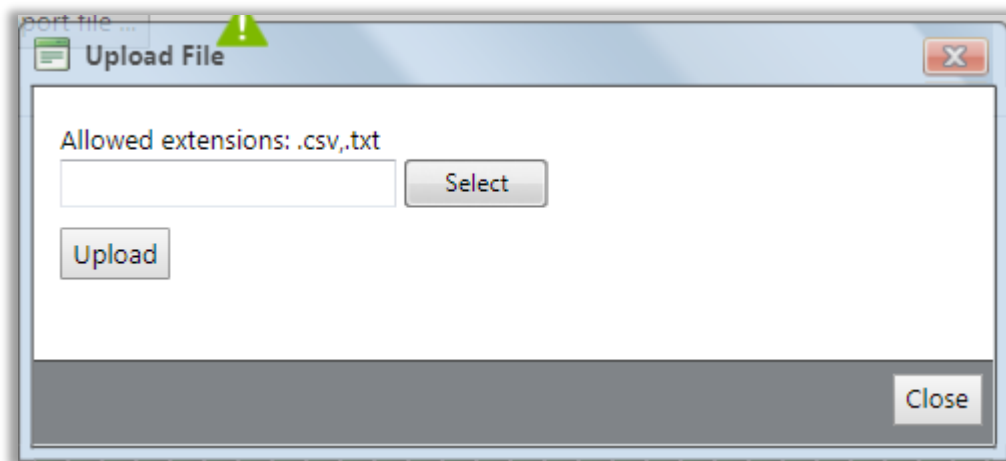
1. Click  to obtain the import template from Amigo.



2. Populate the Import template with eligibility data to be imported into PrimeroEdge.
  - The Eligibility Import accepts comma delimited .csv and .txt file types.

	A	B	C	D	E
1	StudentID	FirstName	LastName	EligibilityCode	
2	369859654	Perez	Anna	1	
3	105112189	Perez	Michael	2	
4	105112987	Price	Susie	1	
5	105112228	Quick	Michelle	3	

3. Click **Select an eligibility import file...**
4. **Browse** for the eligibility file that matches the import template and click **Select**.



5. Click **Upload**.

6. **Review** the Enrollment & File Eligibility Analysis, Pending Eligibility Updates, and Total Records to be Updated. If data is accurate proceed to the next step.
7. Enter **Comments** (optional).

Select an eligibility import file ...
▲

Uploaded File: 1051\_Eligibility\_Test\_892018\_8Records.csv

**Enrollment & File Eligibility Analysis**

Enrollment Analysis	
Total Enrollment:	70
Total Free:	36
Total Reduced:	6
Total Paid:	28
File Analysis	
Total Records:	7
Total Identified Students:	7
Total Unidentified Students:	0
Total Free:	5
Total Reduced:	2
Total Paid:	0

**Pending Eligibility Updates**

Increase of Benefits	
Paid → Free	5
Paid → Reduced	2
Reduced → Free	0
Reduction of Benefits	
Reduced → Paid	0
Free → Reduced	0
Free → Paid	0
<b>Total Records to be Updated:</b>	<b>7</b>

**Comments (Optional)**  
Enter a comment to apply to all eligibility records updated in this file.

Max 450 Characters

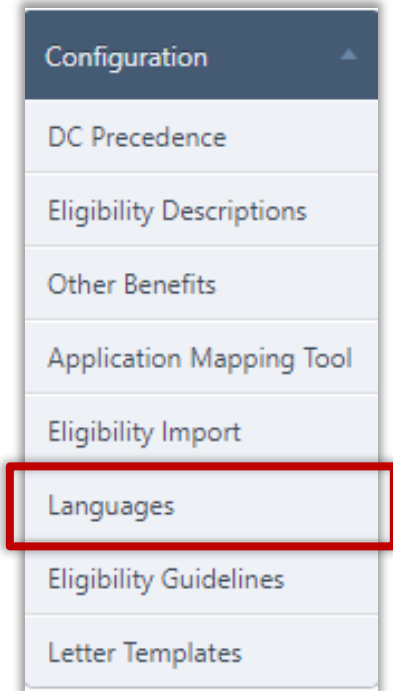
Note: Students receiving a better eligibility status will do so on the same day. Any reduction in benefits will take effect the next day.

Cancel
**Process Pending Eligibility Updates**

8. Click **Process Pending Eligibility Updates**.

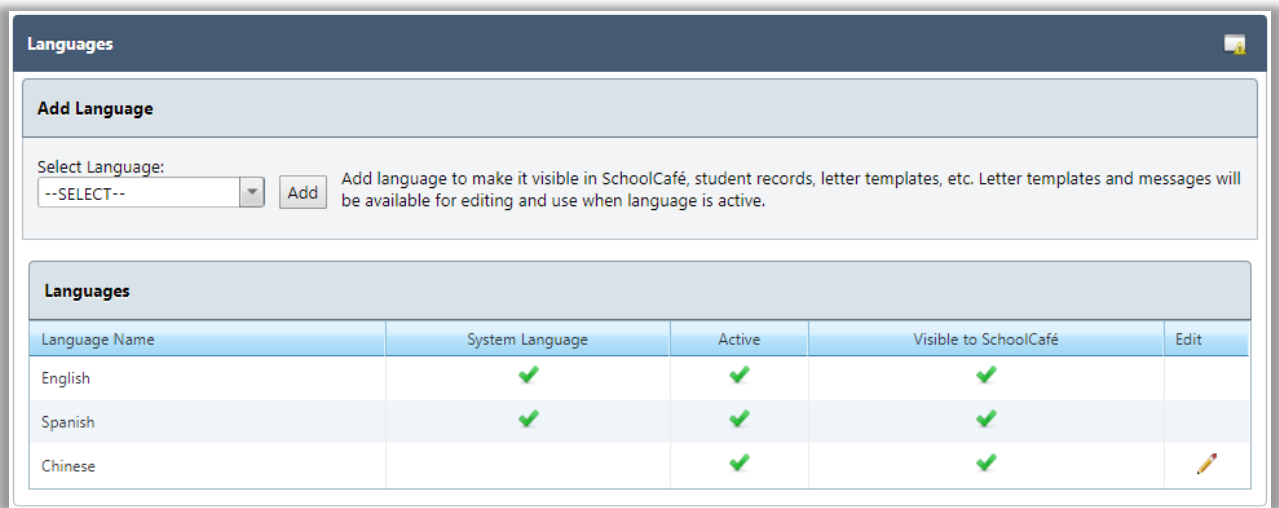
- ▲ Students receiving a better eligibility status will do so on the same day. Any reduction in benefits will take effect the next day.

Languages



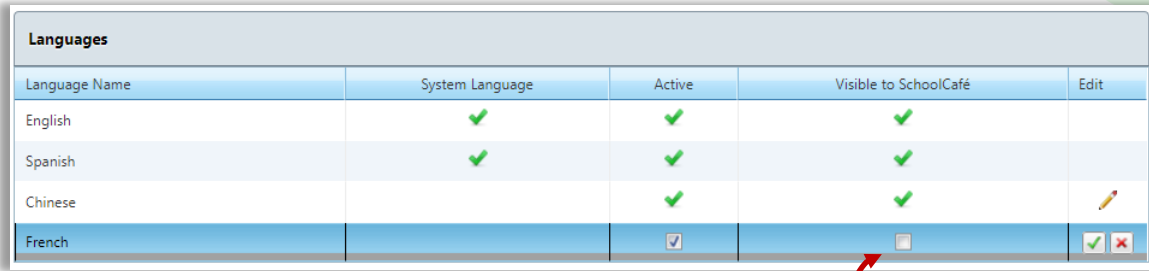
**Languages** allows users to add languages that will be visible for use in SchoolCafé, student records, letter templates, etc.




- ▲ Translations for letter templates and SchoolCafé applications must be provided by SFA. English and Spanish translations are provided.






**To Add a Language to PrimeroEdge and SchoolCafé**

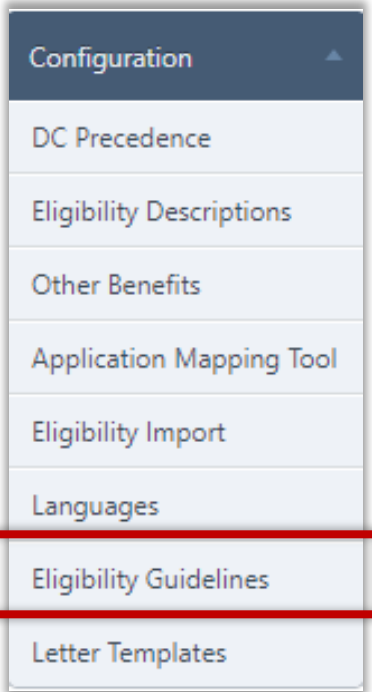
1. Click the **Select Language** dropdown box and click chosen language.
2. Click **ADD**.



Language Name	System Language	Active	Visible to SchoolCafé	Edit
English	✓	✓	✓	
Spanish	✓	✓	✓	
Chinese		✓	✓	
French		<input checked="" type="checkbox"/>	<input type="checkbox"/>	 

3. Click **Edit** (  ).
4. Click the **Visible to School** check box. 
5. Click **Save** (  ).
  - Adding the language to the Active Languages table makes the letter templates available in PrimeroEdge.

Eligibility Guidelines



**Eligibility Guidelines** displays and allows for editing the Income Eligibility Guidelines set forth by the USDA for Free and Reduced-Price meals. These guidelines are used by schools, institutions, and facilities participating in the:

- National School Lunch Program (NSLP)
- School Breakfast Program (SPB)
- Special Milk Program for Children (SMP)
- Child and Adult Care Food Program (CACFP)
- Summer Food Service Program (SFSP)

The annual adjustments are required by section 9 of the National School Lunch Act. These guidelines are effective from July 1 through June 30 every year.

**Eligibility Guidelines**

Academic Year: 2017 - 2018 | State Category: Contiguous States | Apply

Eligibility Guidelines | Error Prone

**Eligibility Guidelines: 2017 - 2018 - Contiguous States** | Edit | Get Guidelines | Generate Report

Household Size	Free Meals					Reduced Price Meals				
	Yearly	Monthly	Twice a Month	Every 2 Weeks	Weekly	Yearly	Monthly	Twice a Month	Every 2 Weeks	Weekly
1	\$15,678.00	\$1,307.00	\$654.00	\$603.00	\$302.00	\$22,311.00	\$1,860.00	\$930.00	\$859.00	\$430.00
2	\$21,112.00	\$1,760.00	\$880.00	\$812.00	\$406.00	\$30,044.00	\$2,504.00	\$1,252.00	\$1,156.00	\$578.00
3	\$26,546.00	\$2,213.00	\$1,107.00	\$1,021.00	\$511.00	\$37,777.00	\$3,149.00	\$1,575.00	\$1,453.00	\$727.00
4	\$31,980.00	\$2,665.00	\$1,333.00	\$1,230.00	\$615.00	\$45,510.00	\$3,793.00	\$1,897.00	\$1,751.00	\$876.00
5	\$37,414.00	\$3,118.00	\$1,559.00	\$1,439.00	\$720.00	\$53,243.00	\$4,437.00	\$2,219.00	\$2,048.00	\$1,024.00
6	\$42,848.00	\$3,571.00	\$1,786.00	\$1,648.00	\$824.00	\$60,976.00	\$5,082.00	\$2,541.00	\$2,346.00	\$1,173.00
7	\$48,282.00	\$4,024.00	\$2,012.00	\$1,857.00	\$929.00	\$68,709.00	\$5,726.00	\$2,863.00	\$2,643.00	\$1,322.00
8	\$53,716.00	\$4,477.00	\$2,239.00	\$2,066.00	\$1,033.00	\$76,442.00	\$6,371.00	\$3,186.00	\$2,941.00	\$1,471.00
+1*	\$5,434.00	\$453.00	\$227.00	\$209.00	\$105.00	\$7,733.00	\$645.00	\$323.00	\$298.00	\$149.00

\* = Each Additional Member | Cancel | Save

**To retrieve Income Eligibility Guidelines**

1. Select an Academic Year and a State Category, if needed, and click **Apply**.
2. Click Get Guidelines.
3. Click **Save**.

**To edit income guidelines**

1. Select an Academic Year and a State Category, if needed, and click **Apply**.
2. Click **Edit**.
3. Enter new income values, as needed.
4. Click **Save**.

**To generate an Eligibility Guidelines report**

1. Select an Academic Year and a State Category, if needed, and click **Apply**.
2. Click Generate Report.

Generated on: 2/2/2018 2:31 PM

### Income Eligibility Guidelines

July 1, 2017 to June 30, 2018

Eligibility determination is based on household size and income. Total income must be at or below the amounts in this table. This table is for **school use** only in application approval. **Do not send to households.**

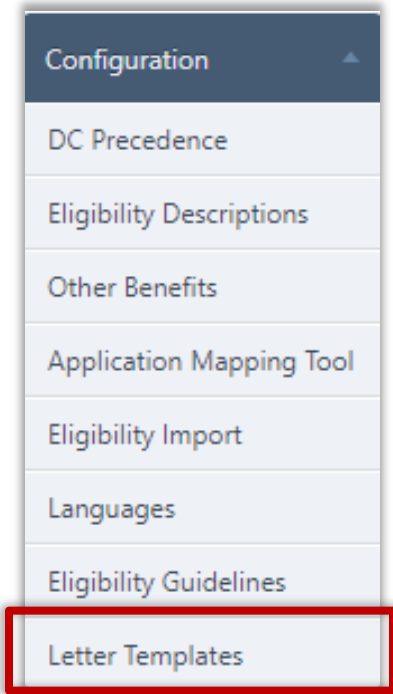
Household Size	FREE MEALS					REDUCED PRICE MEALS				
	Yearly	Monthly	Twice per Month	Every 2 Weeks	Weekly	Yearly	Monthly	Twice per Month	Every 2 Weeks	Weekly
1	\$ 15,678	\$ 1,307	\$ 654	\$ 603	\$ 302	\$ 22,311	\$ 1,860	\$ 930	\$ 859	\$ 430
2	\$ 21,112	\$ 1,760	\$ 880	\$ 812	\$ 406	\$ 30,044	\$ 2,504	\$ 1,252	\$ 1,156	\$ 578
3	\$ 26,546	\$ 2,213	\$ 1,107	\$ 1,021	\$ 511	\$ 37,777	\$ 3,149	\$ 1,575	\$ 1,453	\$ 727
4	\$ 31,980	\$ 2,665	\$ 1,333	\$ 1,230	\$ 615	\$ 45,510	\$ 3,793	\$ 1,897	\$ 1,751	\$ 876
5	\$ 37,414	\$ 3,118	\$ 1,559	\$ 1,439	\$ 720	\$ 53,243	\$ 4,437	\$ 2,219	\$ 2,048	\$ 1,024
6	\$ 42,848	\$ 3,571	\$ 1,786	\$ 1,648	\$ 824	\$ 60,976	\$ 5,082	\$ 2,541	\$ 2,346	\$ 1,173
7	\$ 48,282	\$ 4,024	\$ 2,012	\$ 1,857	\$ 929	\$ 68,709	\$ 5,726	\$ 2,863	\$ 2,643	\$ 1,322
8	\$ 53,716	\$ 4,477	\$ 2,239	\$ 2,066	\$ 1,033	\$ 76,442	\$ 6,371	\$ 3,186	\$ 2,941	\$ 1,471
For Each Additional Household Member Add	\$ 5,434	\$ 453	\$ 227	\$ 209	\$ 105	\$ 7,733	\$ 645	\$ 323	\$ 298	\$ 149

Monthly = 12 pays/per year      Twice per month = 24 pays/year      Every 2 weeks = 26 pays/year

Page: 1 of 1

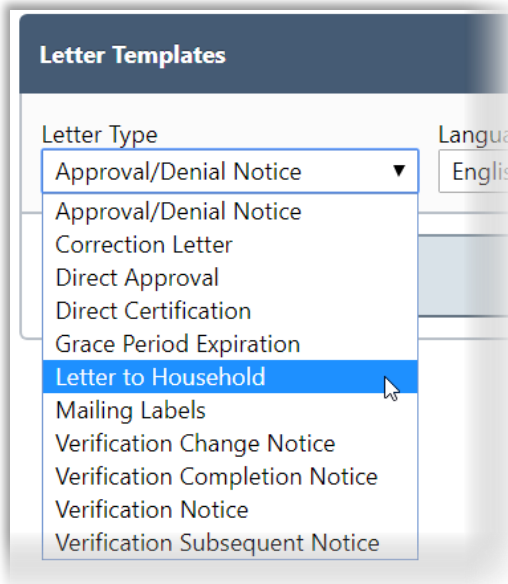


## Letter Templates

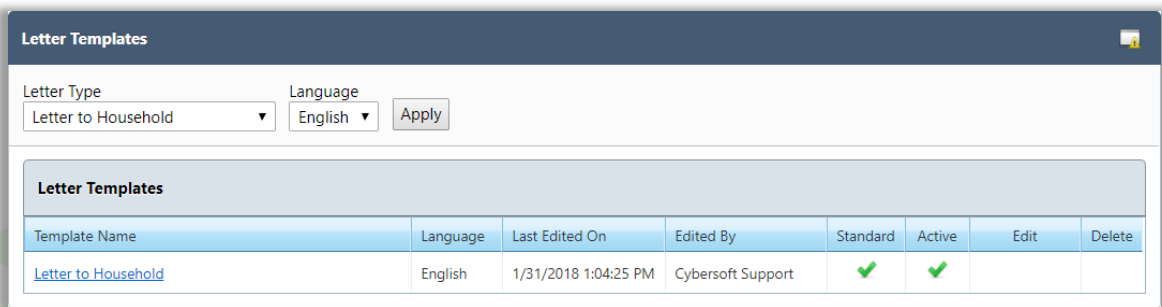


**Letter Templates** manages template files used for letters for notification functions in the Student Eligibility module.

Each function has its own set of letter templates. For example, you may choose to save each year’s Letter to Household template letter for comparison or documentation purposes.



Each Letter Type has one template designated as the “Active” template. This is the template the system uses when the notification function is used. The “Standard” template is the default or original template that was set up when PrimeroEdge was installed.



## Manage Templates

### To display all templates for a Letter Type

1. Select a Letter Type, and select a language, if needed.
2. Click **Apply**.

All existing templates are shown in the **Letter Templates** list.

### To view a letter template

1. Display a list of letter templates.
2. Click a [Template Name](#) link.

The template letter appears in the Letter Viewer

Template Name: Household Letters    Save    Save As

Tahoma 21px    B I U    A    Insert Fields    Insert Table Fields

{{District}}  
 Child Nutrition Department  
 School Year 2010-2011  
 Letter to Household

Printed : {{Current Date}}

To the parents of  
 {{Street Address}}  
 {{City, State, Zip}}

Dear Parent/Guardian:

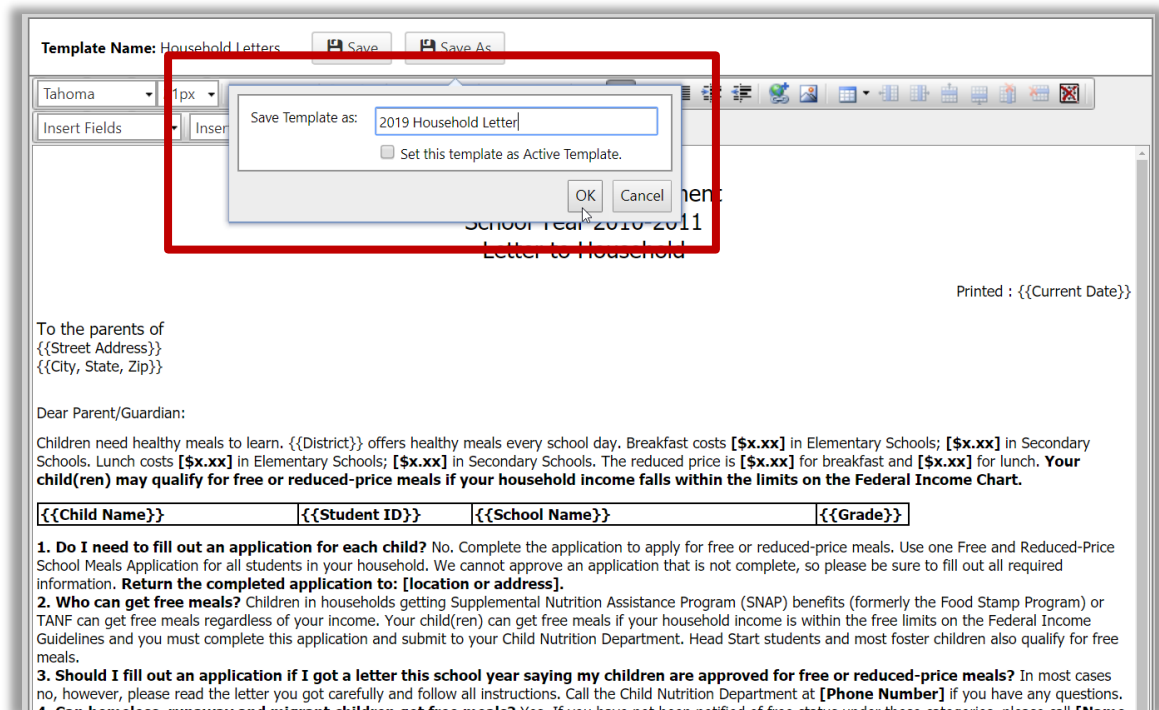
Children need healthy meals to learn. {{District}} offers healthy meals every school day. Breakfast costs **[\$x.xx]** in Elementary Schools; **[\$x.xx]** in Secondary Schools. Lunch costs **[\$x.xx]** in Elementary Schools; **[\$x.xx]** in Secondary Schools. The reduced price is **[\$x.xx]** for breakfast and **[\$x.xx]** for lunch. **Your child(ren) may qualify for free or reduced-price meals if your household income falls within the limits on the Federal Income Chart.**

>{{Child Name}}	>{{Student ID}}	>{{School Name}}	>{{Grade}}
-----------------	-----------------	------------------	------------

- 1. Do I need to fill out an application for each child?** No. Complete the application to apply for free or reduced-price meals. Use one Free and Reduced-Price School Meals Application for all students in your household. We cannot approve an application that is not complete, so please be sure to fill out all required information. **Return the completed application to: [location or address].**
- 2. Who can get free meals?** Children in households getting Supplemental Nutrition Assistance Program (SNAP) benefits (formerly the Food Stamp Program) or TANF can get free meals regardless of your income. Your child(ren) can get free meals if your household income is within the free limits on the Federal Income Guidelines and you must complete this application and submit to your Child Nutrition Department. Head Start students and most foster children also qualify for free meals.
- 3. Should I fill out an application if I got a letter this school year saying my children are approved for free or reduced-price meals?** In most cases no, however, please read the letter you got carefully and follow all instructions. Call the Child Nutrition Department at **[Phone Number]** if you have any questions.
- 4. Can homeless, runaway and migrant children get free meals?** Yes. If you have not been notified of free status under these categories, please call **[Name of Liaison]** at **[Phone Number of Liaison]** to see if your child(ren) qualifies.
- 5. Who can get reduced price meals?** Your child(ren) can get low cost meals if your household income is within the reduced-price limits on the Federal Income Chart.
- 6. I get WIC. Can my child(ren) get free meals?** Children in households participating in WIC may be eligible for free or reduced-price meals. Please fill out an application.

### To add a custom letter template

1. Click a [Template Name](#) link.
2. Click **Save As**.
3. Enter a name for the new letter template.
4. Click **OK**.

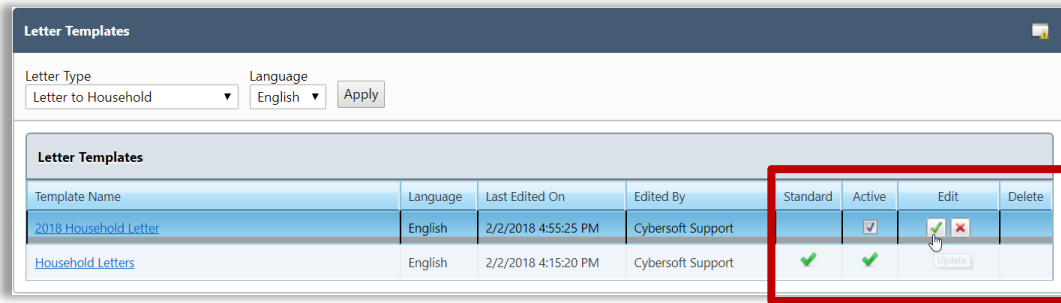


- ▲ Do not use special characters in the template name.
- Only one letter in a template category can be “active”.



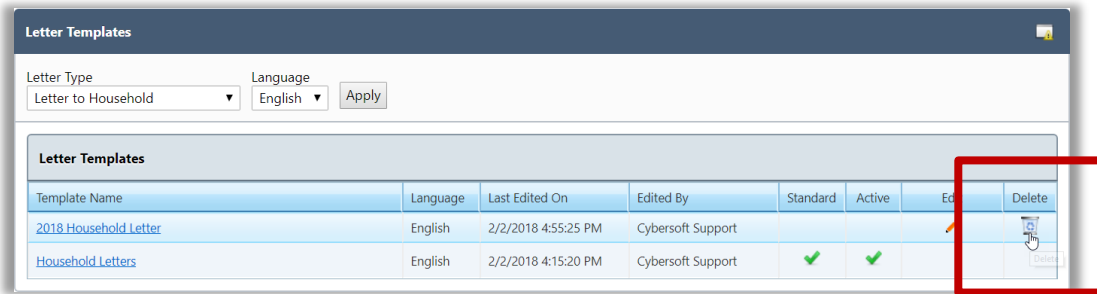
**To make a template the active template**

1. Click **Edit** (✎) in a template listing.
2. Click the checkbox in the Active column.
3. Click **Update** (✓) in the Edit column.

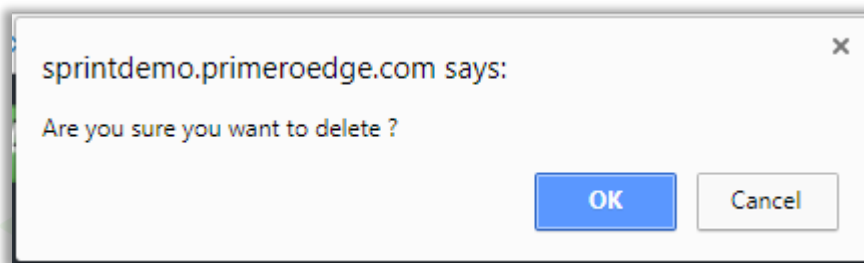


**To delete a template**

1. Click **Delete** (🗑️) in a template listing.



2. Click **OK**.



## Edit Templates

### To edit a letter template

1. Display a list of letter templates and click a [Template Name](#) link.
2. Make changes, as needed.
3. Click **Save** to save changes.

Template Name: Household Letters

Tahoma 19px **B I**

Insert Fields Insert Table Fields

{{District}}  
 Child Nutrition Department  
 School Year 2010-2011  
 Letter to Household

Printed : {{Current Date}}

To the parents of  
 {{Child Name}}  
 {{Street Address}}  
 {{City, State, Zip}}

Dear Parent/Guardian:

Children need healthy meals to learn. {{District}} offers healthy meals every school day. Breakfast costs **[\$x.xx]** in Elementary Schools; **[\$x.xx]** in Secondary Schools. Lunch costs **[\$x.xx]** in Elementary Schools; **[\$x.xx]** in Secondary Schools. The reduced price is **[\$x.xx]** for breakfast and **[\$x.xx]** for lunch. **Your child(ren) may qualify for free or reduced-price meals if your household income falls within the limits on the Federal Income Chart.**

{{Child Name}}	{{Student ID}}	{{School Name}}	{{Grade}}
----------------	----------------	-----------------	-----------

- 1. Do I need to fill out an application for each child?** No. Complete the application to apply for free or reduced-price meals. Use one Free and Reduced-Price School Meals Application for all students in your household. We cannot approve an application that is not complete, so please be sure to fill out all required information. **Return the completed application to: [location or address].**
- 2. Who can get free meals?** Children in households getting Supplemental Nutrition Assistance Program (SNAP) benefits (formerly the Food Stamp Program) or TANF can get free meals regardless of your income. Your child(ren) can get free meals if your household income is within the free limits on the Federal Income Guidelines and you must complete this application and submit to your Child Nutrition Department. Head Start students and most foster children also qualify for free meals.
- 3. Should I fill out an application if I got a letter this school year saying my children are approved for free or reduced-price meals?** In most cases no, however, please read the letter you got carefully and follow all instructions. Call the Child Nutrition Department at **[Phone Number]** if you have any questions.
- 4. Can homeless, runaway and migrant children get free meals?** Yes. If you have not been notified of free status under these categories, please call **[Name of Liaison]** at **[Phone Number of Liaison]** to see if your child(ren) qualifies.
- 5. Who can get reduced price meals?** Your child(ren) can get low cost meals if your household income is within the reduced-price limits on the Federal Income Chart.
- 6. I get WIC. Can my child(ren) get free meals?** Children in households participating in WIC may be eligible for free or reduced-price meals. Please fill out an application.
- 7. Will the information I give be checked?** Yes, we may ask you to send written proof.
- 8. If I don't qualify now, may I apply later?** Yes. You may apply at any time during the school year if your household size goes up, income goes down, or if you start receiving SNAP, TANF or other benefits. If you lose your job your children may be able to get free or reduced-priced meals.
- 9. What if I disagree with the school's decision about my application?** You should talk to school officials. You also may ask for a hearing by calling or writing to {{Hearing Official}}, {{Hearing Official Address}}, {{Hearing Official Phone Number}}.
- 10. May I apply if someone in my household is not a U.S. citizen?** Yes. You or your child(ren) do not have to be a U.S. citizen to qualify for free or reduced-price meals.
- 11. Who should I include as members of my household?** You must include yourself and all people living in your household, related or not (such as children, grandparents, other relatives or friends).
- 12. What if my income is not always the same?** List the amount that you normally receive. For example, if you normally get \$1,000 each month, but you missed some work last month and only got \$900, put down that you get \$1,000 per month. If you normally get overtime pay, include that amount as income. If you do not normally get overtime pay, do not include it as income.
- 13. We are in the military, do we include our housing allowance as income?** If your housing is part of the Military Housing Privatization Initiative, do not include your housing allowance as income. All other allowances must be included in your gross income.

If you have any questions or need help, please feel free to contact us **[Name and Phone Number]**.

Sincerely,  
 {{Determining Official}}

Design HTML Preview

## Manage Data Fields

A data field is a unit of information that is different for each printed letter, such as “StudentName”. Data fields can be inserted and removed as needed.

### To insert a data field

1. Place the cursor where the new field is to appear.
2. Click **Insert Fields**.
3. Select the field to insert on the drop-down list.

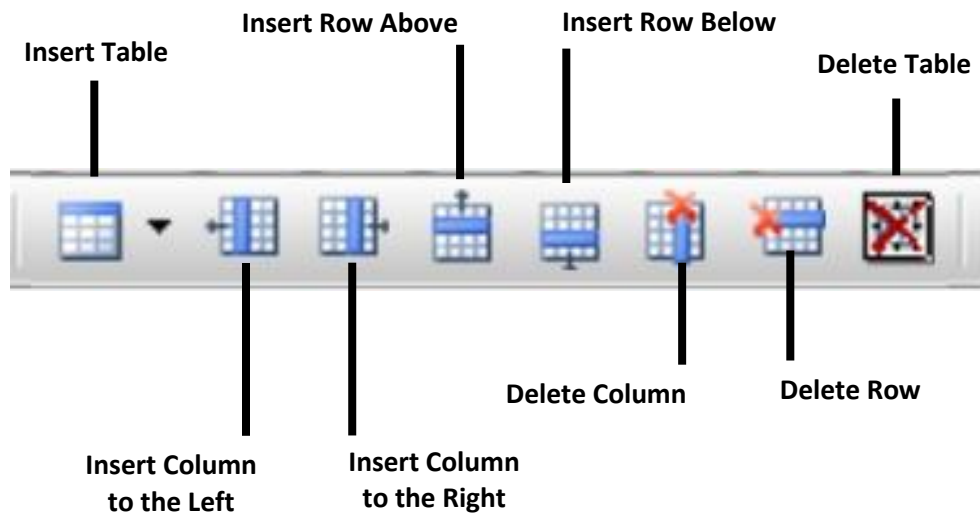
### To remove a data field

1. Highlight the field to remove.
2. Click **Delete** (on your keyboard).

The screenshot shows a document editor interface. At the top, the template name is "Household Letters". Below the menu bar, there are two dropdown menus: "Insert Fields" and "Insert Table Fields". The "Insert Fields" menu is open, showing a list of fields. The field "SFA Correspondence Address" is highlighted with a red box. The document content is a letter from the Child Nutrition Department for the school year 2010-2011. It contains several data fields represented by curly braces, such as {{District}}, {{Student ID}}, and {{School Name}}. The letter text discusses meal costs and application requirements.

## Manage Tables

The letter template toolbar offers table functions.



### To insert a table

1. Place the cursor where the new table is to appear.
2. Click **Insert Table** on the toolbar.
3. Select the number of columns and rows for the table.

### To insert a table column

1. Place the cursor in a column to the left or right of where the column is to be inserted.
2. Click **Insert Column to the Left** or **Insert Column to the Right**.

### To insert a table row

1. Place the cursor in a table row.
2. Click **Insert Row Above** or **Insert Row Below** on the toolbar.



**To delete a column**

1. Place the cursor in the column to remove.
2. Click **Delete Column** on the toolbar.

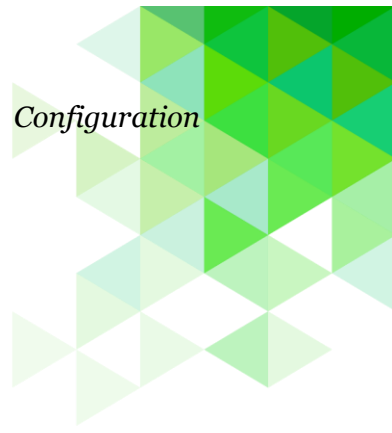
**To delete a row**

1. Place the cursor in the column to remove.
2. Click **Delete Row** on the toolbar.

**To delete a table**

1. Highlight all rows of a table.
2. Click **Delete Table** on the toolbar.





« End of Manual »

