

CYBERSOFT

Primero *edges*

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PrimeroEdge Food Service Solutions
PrimeroEdge Student Eligibility User Guide

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1

Online Applications

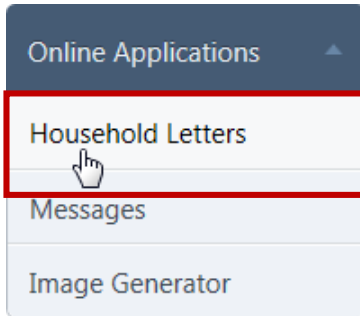
In this section, you will learn how to:

- ✓ Upload, view and remove the Household Letter displayed on the district's Free & Reduced Meals Online Applications web site.
- ✓ Change field/message text displayed on the district's Free & Reduced Meals Online Applications web site pages.

Online Applications at a Glance

Menu Selection	Description
Household Letters	Upload the Household Letter that is displayed in the district's Free & Reduced Meals Online Applications web site after the parent logs in.
Messages	Update Free & Reduced Meals Online Applications field/message text displayed on the district web site.

Household Letters



Household Letters allows you to upload a letter to display for an applicant using your district’s Free & Reduced Meals Online Applications website. The letter is displayed on the **Household Letter** page immediately after the applicant successfully logs in.

Only one letter for each language version per academic year is allowed. If you choose to upload a second letter for a selected language, the first letter is removed.



Note

All letters must be in Adobe© Acrobat PDF format.


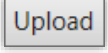
By default, on the **Household Letters** page:

- **Academic Year** is set to the current school year.
- **Language** is set to “ALL”.
- All current letters are listed in **Household Letters** list.
- **Add New Letter** group is set to upload an English-version letter for the current school year.


Household Letters Page

 A screenshot of the 'Household Letters' page. At the top, there is a header 'Household Letters'. Below the header, there are two dropdown menus: 'Academic Year' (set to '2012 - 2013') and 'Language' (set to '-- ALL --'), followed by an 'Apply' button. Below this is a table with the following columns: 'Letter Name', 'File Name', 'Academic Year', 'Language', 'View', and 'Remove'. The table is currently empty, with the text 'No records to display.' below it. At the bottom, there is an 'Add New Letter' section with two dropdown menus: 'Academic Year' (set to '2012 - 2013') and 'Language' (set to 'English'), followed by an 'Upload' button.

Page Functions

Button	Description
	Click to display a list of students that match the selected conditions.
	Click to upload a letter file for the selected academic year and language.

Listings: Household Letters

Household Letters					
Letter Name	File Name	Academic Year	Language	View	Remove
Letter to Household	A Letter To Household.pdf	2012 - 2013	English	View	

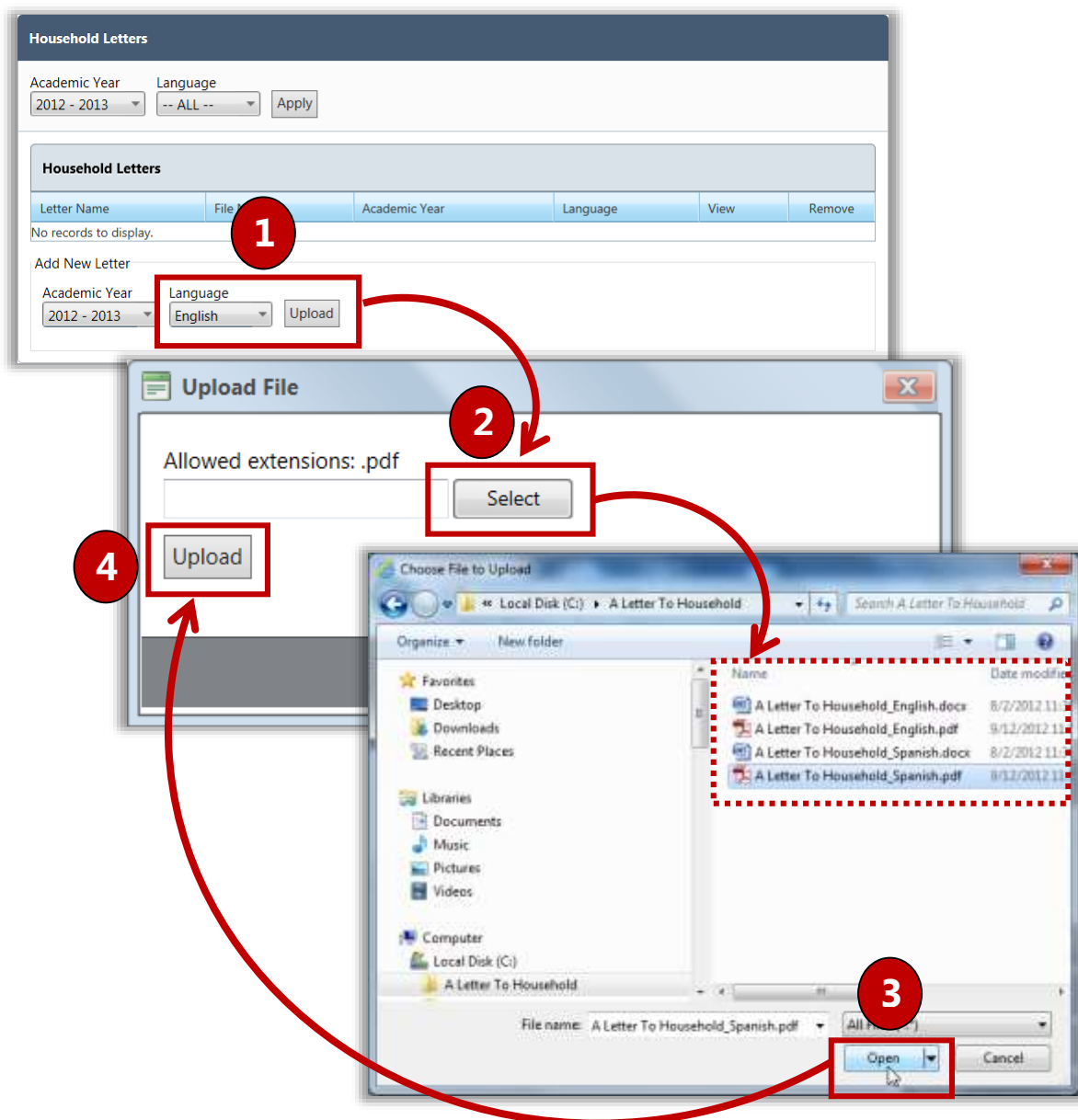
Header	Data Type	Description
Letter Name	<i>View only</i>	Static text for all letters
File Name	<i>View only</i>	Complete name of letter file
Academic Year	<i>View only</i>	Year to which the letter pertains
Language	<i>View only</i>	Language version of the letter
View	<i>Clickable link</i>	Click to view the letter in the Adobe Acrobat window
Remove	<i>Clickable link</i>	Click to remove the letter

Uploading a Household Letter

To upload a Household Letter

1. In **Language**, select a language, if needed, and click **Upload**.
2. Click **Select** to browse for a file.
3. Use standard Windows navigation techniques to select a file and click **Open**.
4. In the **Upload File** popup, click **Upload**.

An upload success message and the uploaded letter appears on the **Household Letters** page.



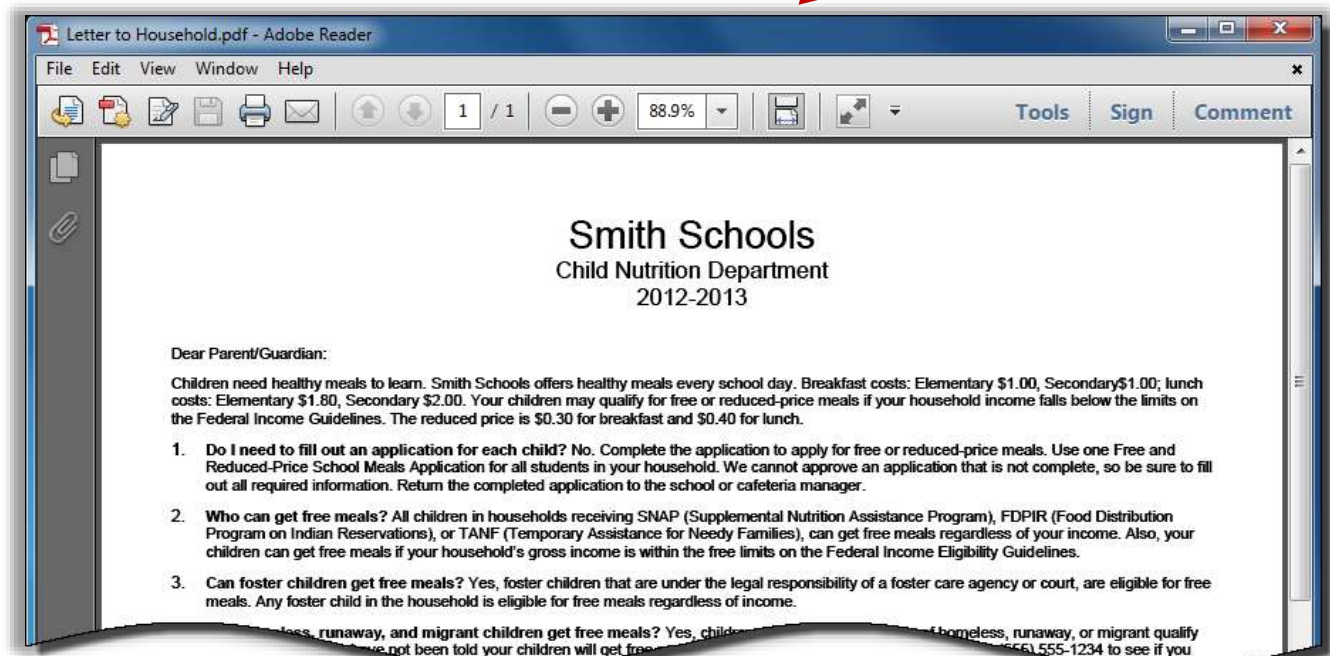
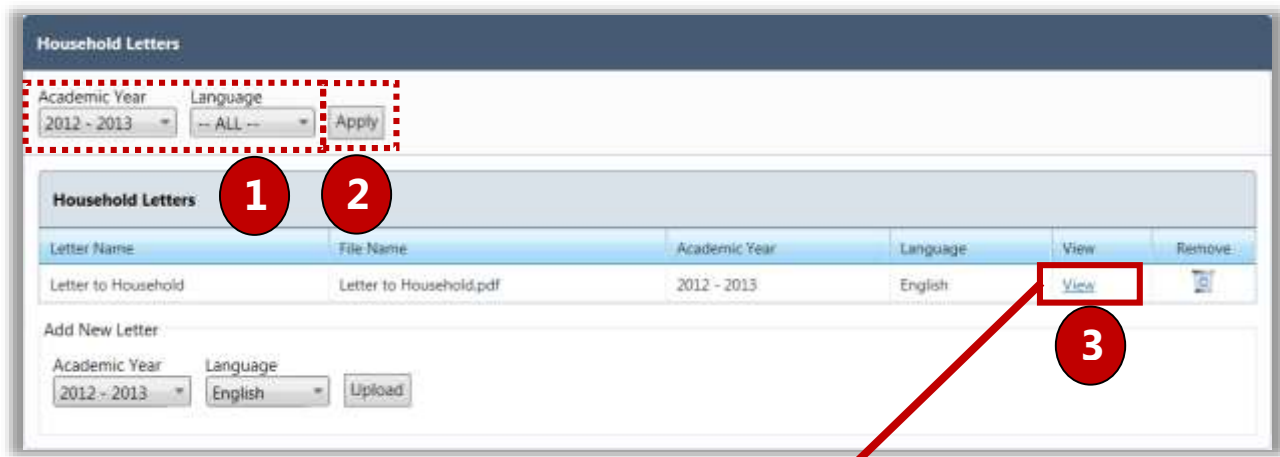
Viewing a Household Letter

To view a Household Letter

1. In **Academic Year**, select a year, if needed, and in **Language**, select “ALL” or a language.

2. Click .

3. In a letter listing, click [View](#).

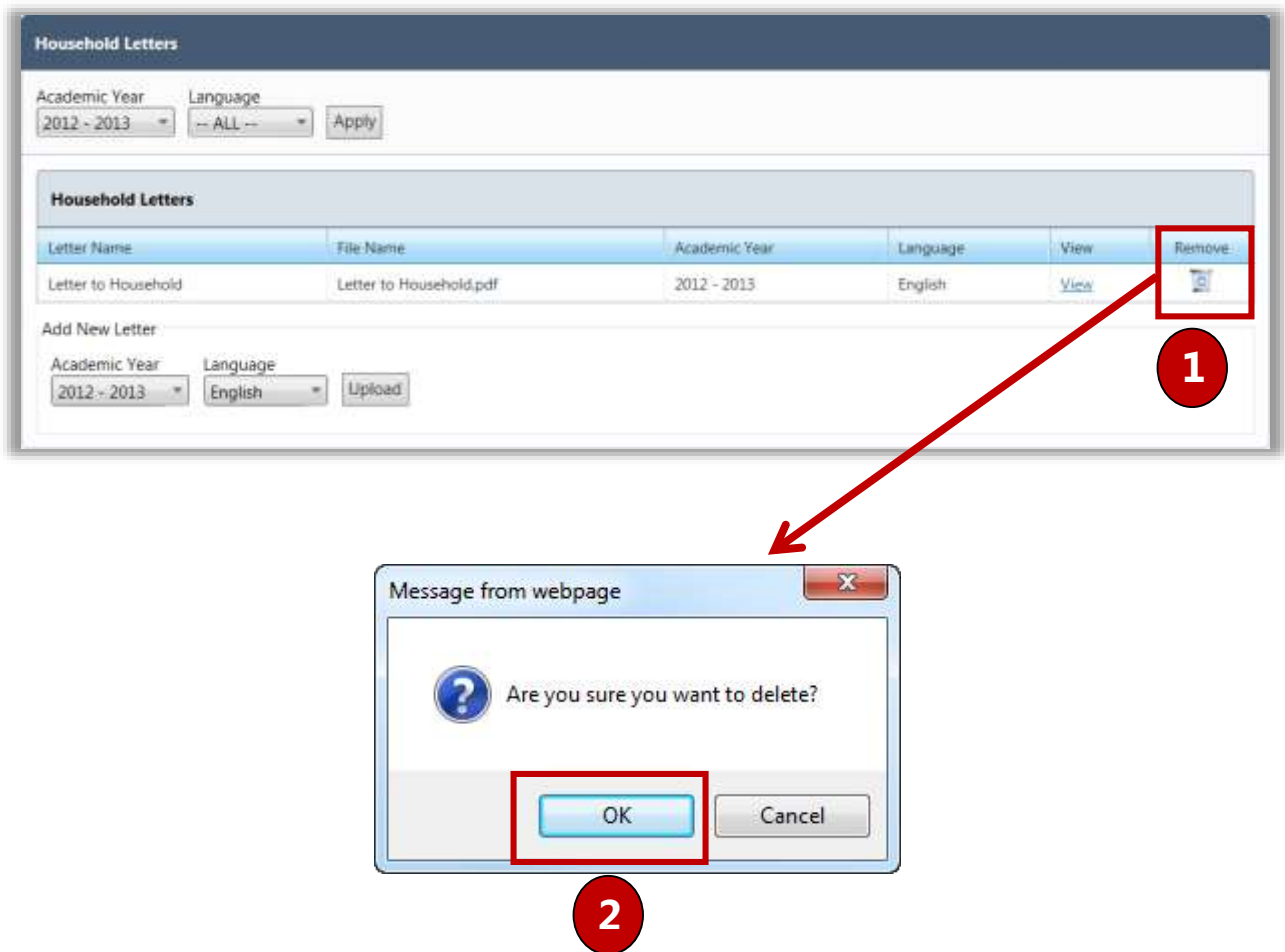


Deleting a Household Letter

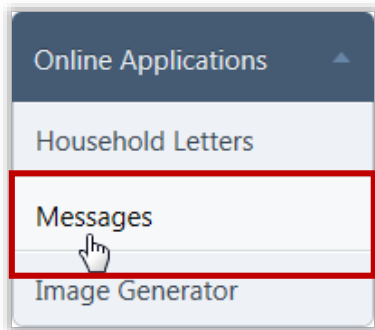
To remove a Household Letter

1. In a letter listing, click **Remove** ().
2. Click  .

A delete success message appears and the letter listing in **Household Letters** is removed.



Messages



Messages allows you to change the text of any field in the district’s Free & Reduced Meals Online Applications web site.

For example, if you want to show “temporary assistance” in place of “SNAP or TANF” in the Instructions on the **Temporary Assistance** page, you simply display the current text and update the description. The changes take effect immediately.

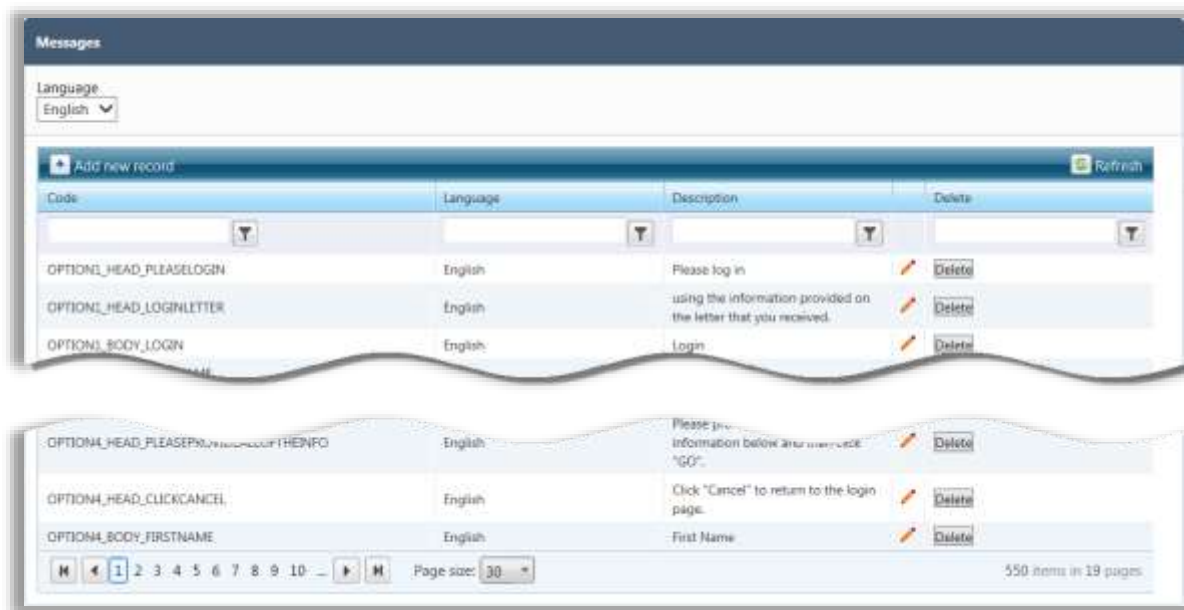
Note

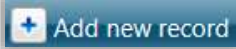

Messages are provided in both English and Spanish. If you make changes to one language, remember to make changes to the second language as well.

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

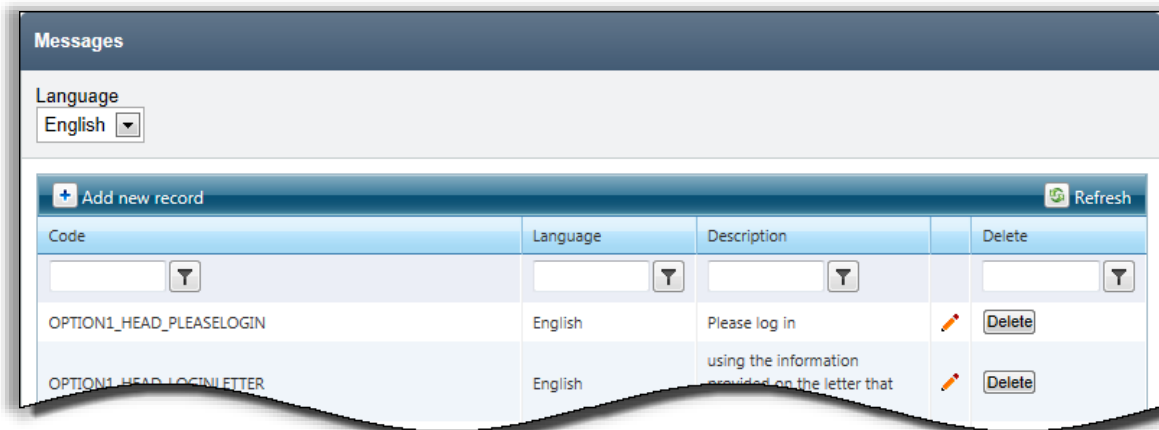
- Language is set to “English”.
- 30 messages are shown on a page; change the page size if needed using the list display control at the bottom of the page.
- Most columns include a filter button in the column header to allow for searching for data.



Messages Page



Button	Description
	Click to add a new message.
	Click to update the information displayed on the page.



Listings: Messages



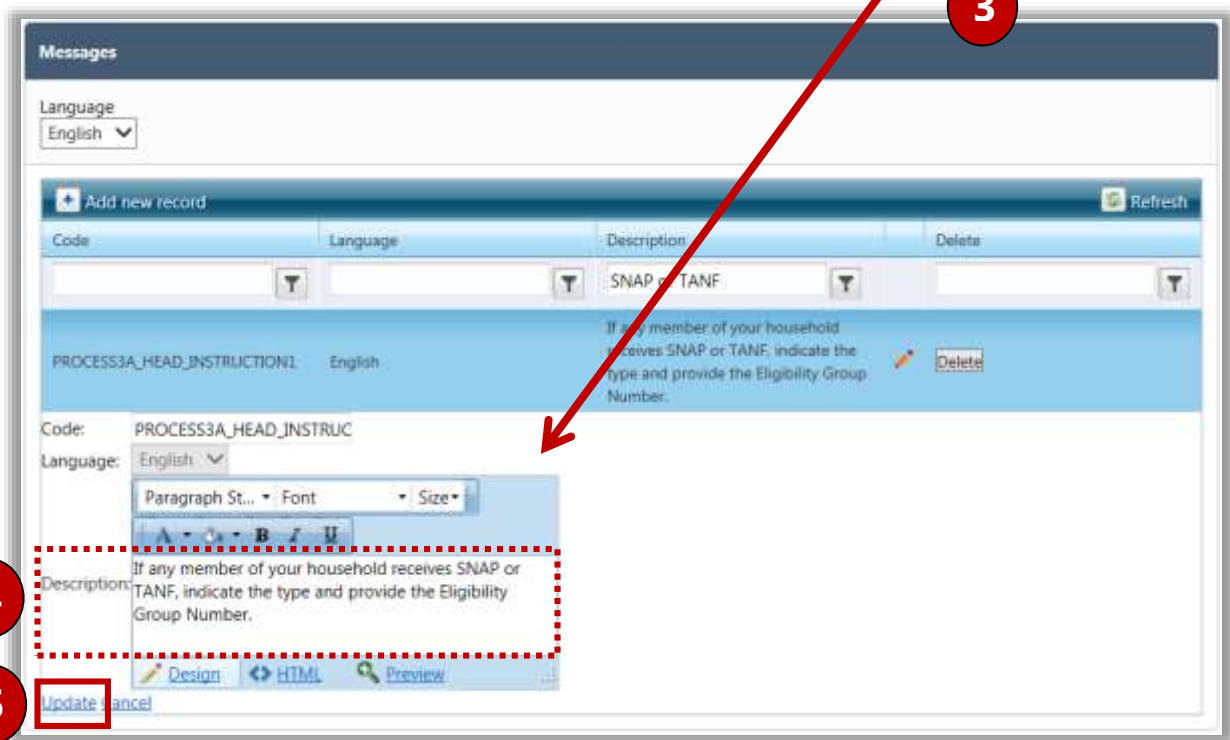
Header	Data Type	Description
Code	<i>View only</i>	Internal code string that identifies the text field
Language	<i>View only</i>	Letter language version
Description	<i>View only</i>	Field or message text shown on the district’s Free & Reduced Meals Online Applications web site
(Edit)	<i>Clickable icon</i> ()	Click to display the expanded text edit area
Delete		Click to remove the message listing

Updating Message Text

To update message text

1. In the **Description** filter, enter a text string.
2. Click **Filter** .
3. In a message listing, click **Edit** ().
4. In **Description**, make changes as needed to the message text.
5. Click **Update**.

An update success message appears.



2

Applications

In this section, you will learn how to:

- ✓ Scan FRE applications.
- ✓ Manually enter a student application.
- ✓ Validate FRE applications.
- ✓ Notify applicants regarding eligibility.
- ✓ View and update applications in the Smart Bin.
- ✓ Search for and view applications via the Master Index.
- ✓ Scan an application to use in mapping form fields on Free & Reduced Meals Online Applications web site.

Applications at a Glance

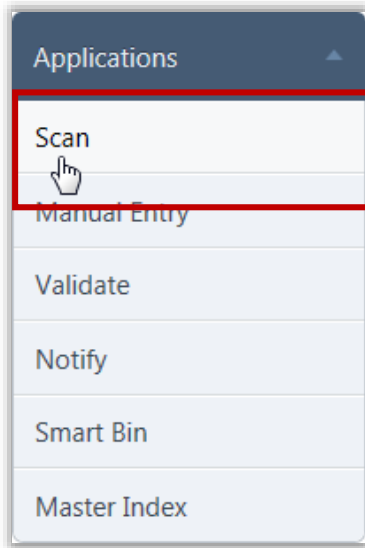
Menu selections on the **Applications** menu create and maintain student applications for Free and Reduced Priced meals.

Menu Function	Description
Scan	Prepare, scan and review student applications
Manual Entry	Manually enter student applications that cannot be scanned
Validate	Review and update manual-entry and scanned student applications; display contents of and check-in or check-out application batches
Notify	Select complete batches of applications or individual applications to which to send notification letters; view individual application letters
Smart Bin	View, update or validate individual applications; view, validate or delete pending applications; view or restore deleted applications
Master Index	Search by application or student to view, update, or validate application or student data

Note

Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Applications** menu, you may see a subset of the functions listed above.

Scan



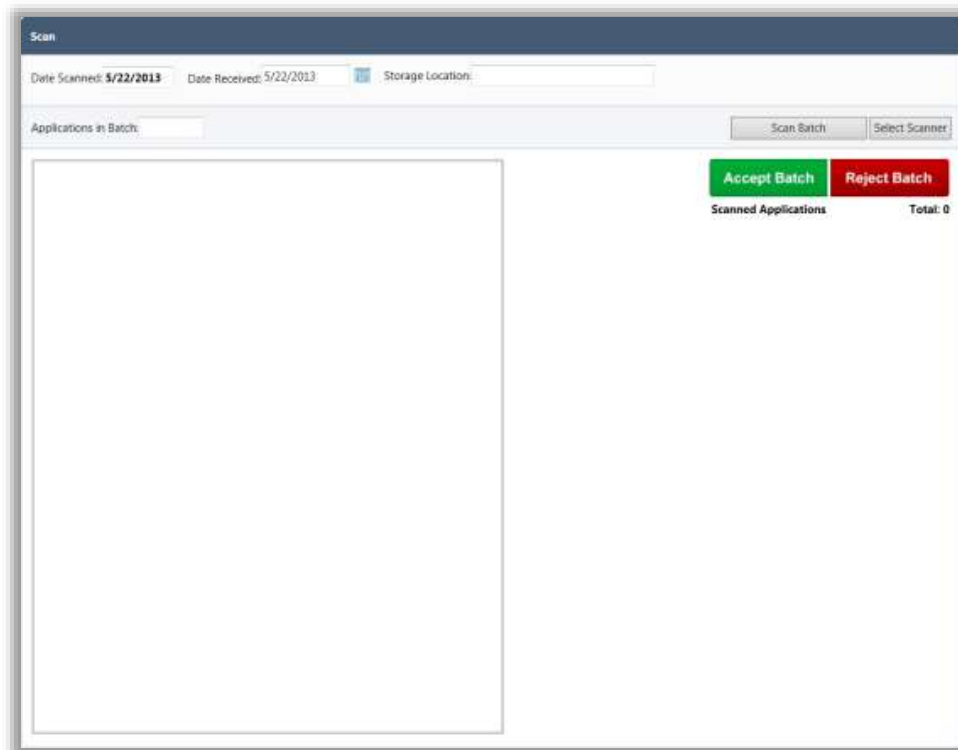
Scan converts paper application data from written to digital format, checks for completeness of the data listed on the application, and stores the scanned information.

Scanning is performed on a computer with a scanner directly attached to it.

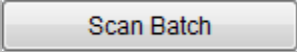
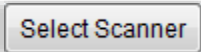


By default, on the **Scan** page:

- The current date is entered for **Date Scanned** and **Date Received**.
- **Storage Location** and **Applications in Batch** are empty

Scan Page



Page Functions

Button	Description
	Click to start the application scan process.
	Click to choose a scanner when multiple scanners are available.
	Click to accept all applications in the batch of scanned applications.
	Click to discard all applications in the batch of scanned applications.

Batch Preparation

To prepare a batch of applications for processing:

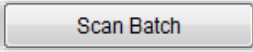
1. Remove instructional page(s) if still attached.
2. Remove all staples or paperclips. Notes or documents attached to an application can be scanned in later. See Documents section under **Master Index: View Application**.
3. Group applications in batches of 25 or less.
4. A batch can be as small as 1 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.

Scanning Applications

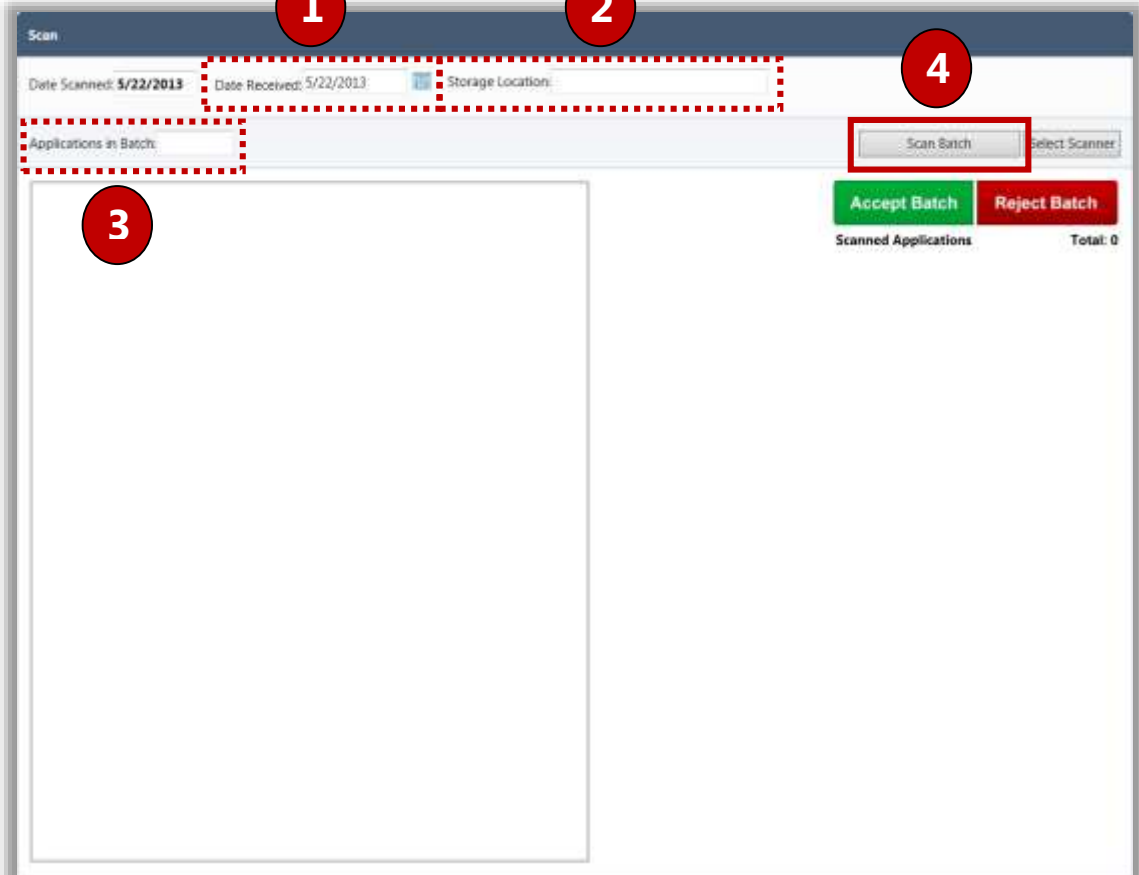
To scan an application

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  .

★ Notes

- **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 the 'Scan' application interface. It features a header bar with the title 'Scan'. Below the header, there are several input fields and buttons. Callout 1 points to the 'Date Scanned' field, which is pre-filled with '5/22/2013'. Callout 2 points to the 'Date Received' field, also pre-filled with '5/22/2013', and the 'Storage Location' field. Callout 3 points to the 'Applications in Batch' input field. Callout 4 points to the 'Scan Batch' button. Below the input fields, there are two buttons: 'Accept Batch' (green) and 'Reject Batch' (red). At the bottom right, there are two labels: 'Scanned Applications' and 'Total: 0'.

Previewing Applications

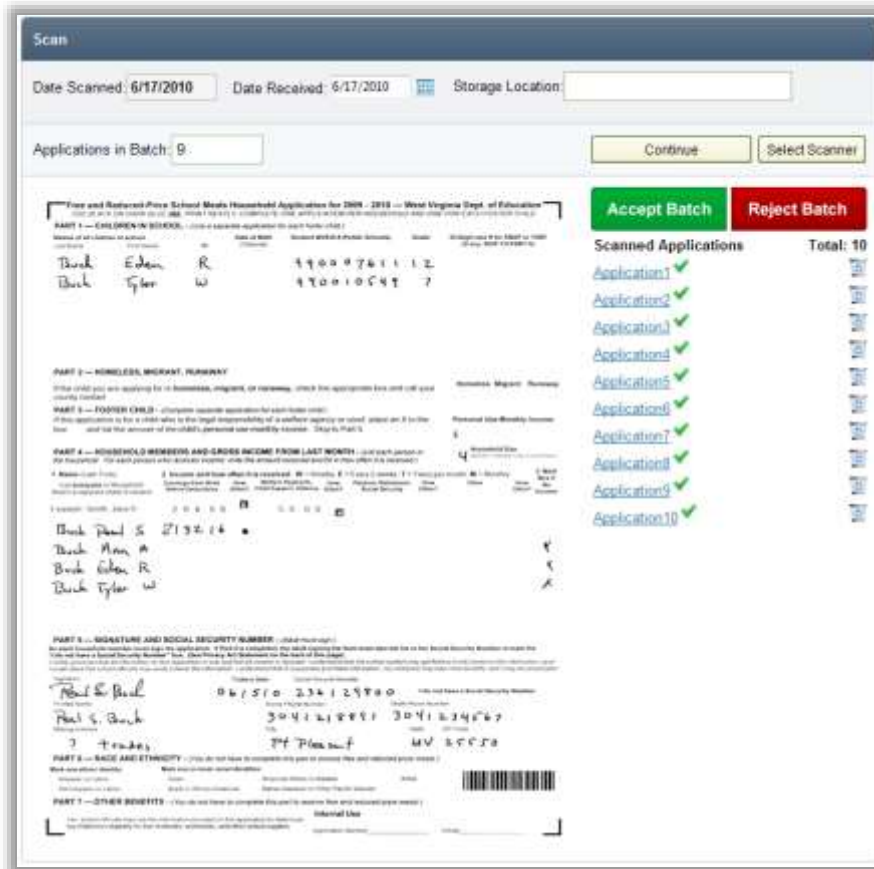
After scanning a batch of applications, each scanned application is listed in **Scanned Applications** and named “**Application#**” where the number is a temporary number and indicates the application’s order in the batch.

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:

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

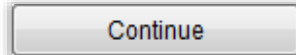


Troubleshooting Scans

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



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**.



Accepting an Application Batch

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

- Click  .

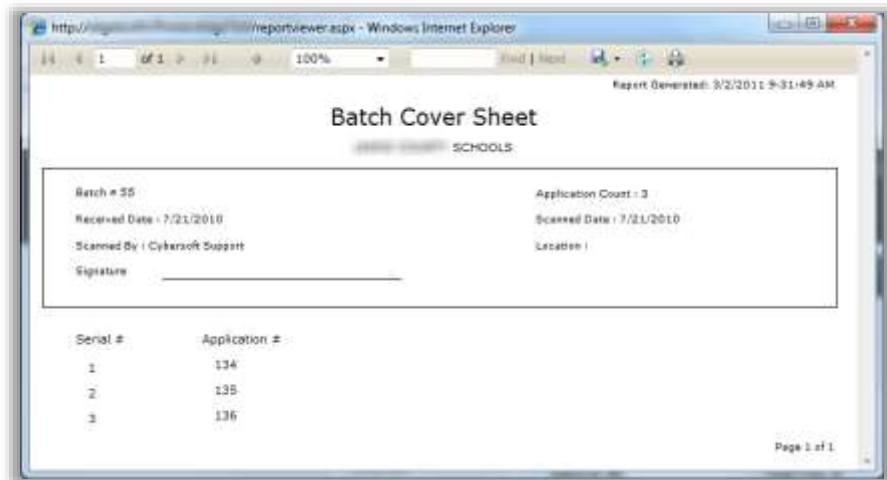
The digital image of each application is saved and assigned a permanent number. An automatically-generated batch number is assigned when the batch is accepted.



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.



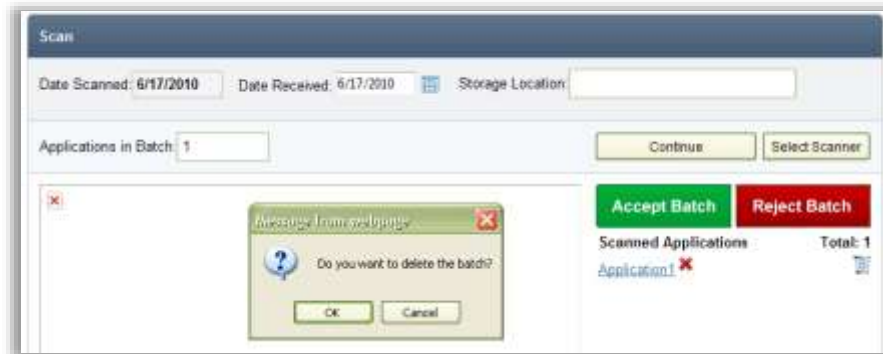
Rejecting an Application Batch

If the batch is unacceptable:

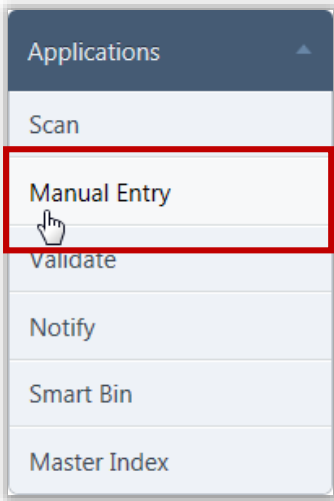
- Click  .

A confirmation message appears to verify the rejection.

- Click  .



Manual Entry



Manual Entry is the process of entering an application manually in PrimeroEdge for Free & Reduced Eligibility. The application is neither scanned nor not entered through an Online Applications website. In this situation, the parent/guardian has completed a paper FRE 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.

On the **Manual Entry** page:

- There are no default selections


Manual Entry Page



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 11th 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.

Page Functions

Button	Description
	Click to display the Validate window to begin entry of an application.

Adding a Manual-Entry Application

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.

PrimoEdge - Validate - Windows Internet Explorer

Students Add Household...

ID	Name	Site	Grade	Foster	Birth Date
No records to display.					

Case # SNAP Homeless Migrant Runaway

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

Name	Income Type	Income Amount	No Income	2012	2015
No records to display.					

Household Size: Total Income: PFD: 2012 2013

Applicant SSN: No SSN Signature Language: English

Correction Required You must enter at least one student before you can process this application.

Adding a Student to an Application

To add a student to an application

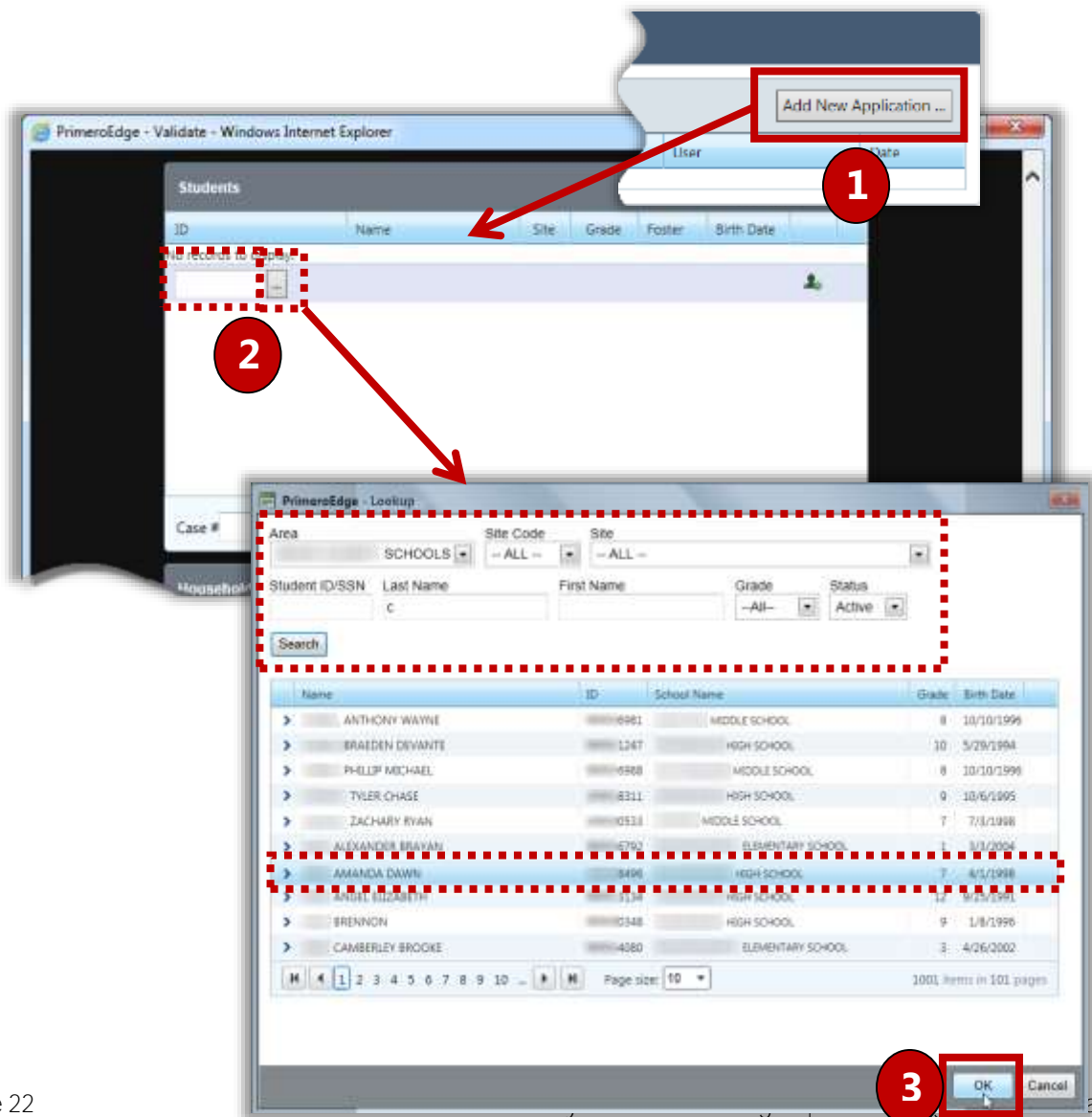
1. Click to display the **Validate** window.
2. In **ID**, enter the student's assigned ID.

-or-


Click **Lookup** ().

The **Lookup** popup displays. Use the search conditions (**Student ID/SSN**, **Last Name**, **First Name**, and **Grade**) to find the student information.

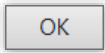
3. Select (highlight) the student listing and click to add the student to the application.

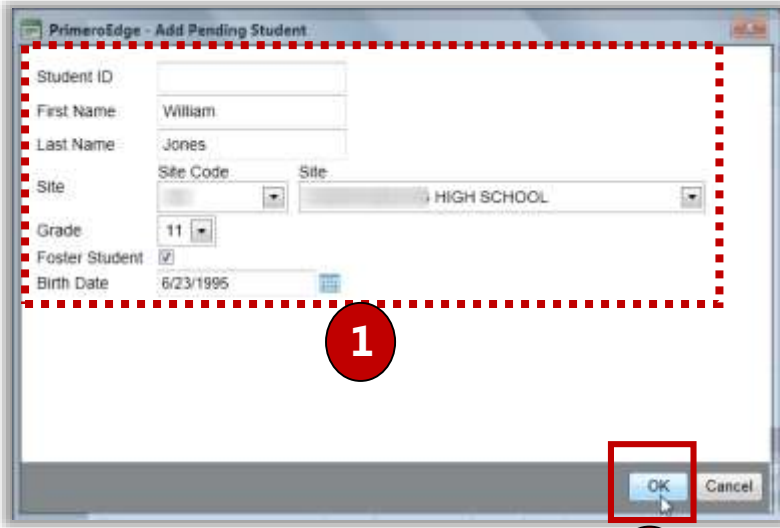


Adding a Pending Student

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  .




The screenshot shows a dialog box titled "PrimerEdge - Add Pending Student". The form contains the following fields:

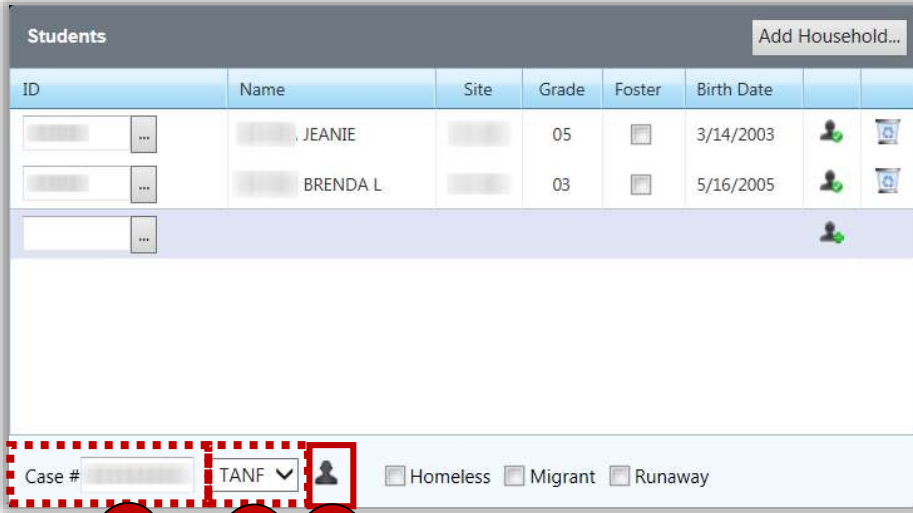
- Student ID: (empty)
- First Name: William
- Last Name: Jones
- Site Code: (empty)
- Site: HIGH SCHOOL
- Grade: 11
- Foster Student:
- Birth Date: 6/23/1995

At the bottom right, there are two buttons: "OK" and "Cancel".


Adding SNAP/TANF Benefits

To add SNAP/TANF benefits

1. In **Case #**, enter either the Supplemental Nutrition Assistance Program (SNAP) or Temporary Aid for Needy Families (TANF) identification number.
2. In the drop-down list, select the benefits type.
3. Click **Add Benefit Recipient** () and enter the name of the individual who is receiving the SNAP or TANF benefits.



ID	Name	Site	Grade	Foster	Birth Date		
...	JEANIE	...	05	<input type="checkbox"/>	3/14/2003		
...	BRENDA L	...	03	<input type="checkbox"/>	5/16/2005		
...							

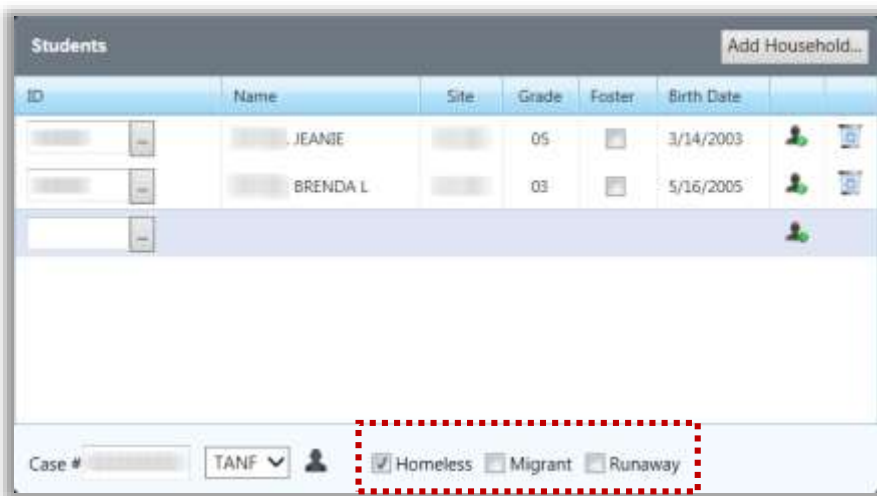
Case # TANF  Homeless Migrant Runaway

1 2 3

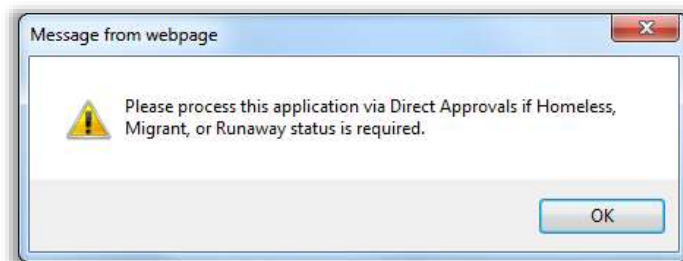
Processing Direct Approvals

Direct Approval options are shown if the “[Show Direct Approval options on Validate page](#)” system setting is enabled. This setting is found in the **[System]** module in the **Management > System Settings** function.

These options are shown here simply as a reminder to process applications with any of these options checked through the **Administration > Direct Approvals** function.



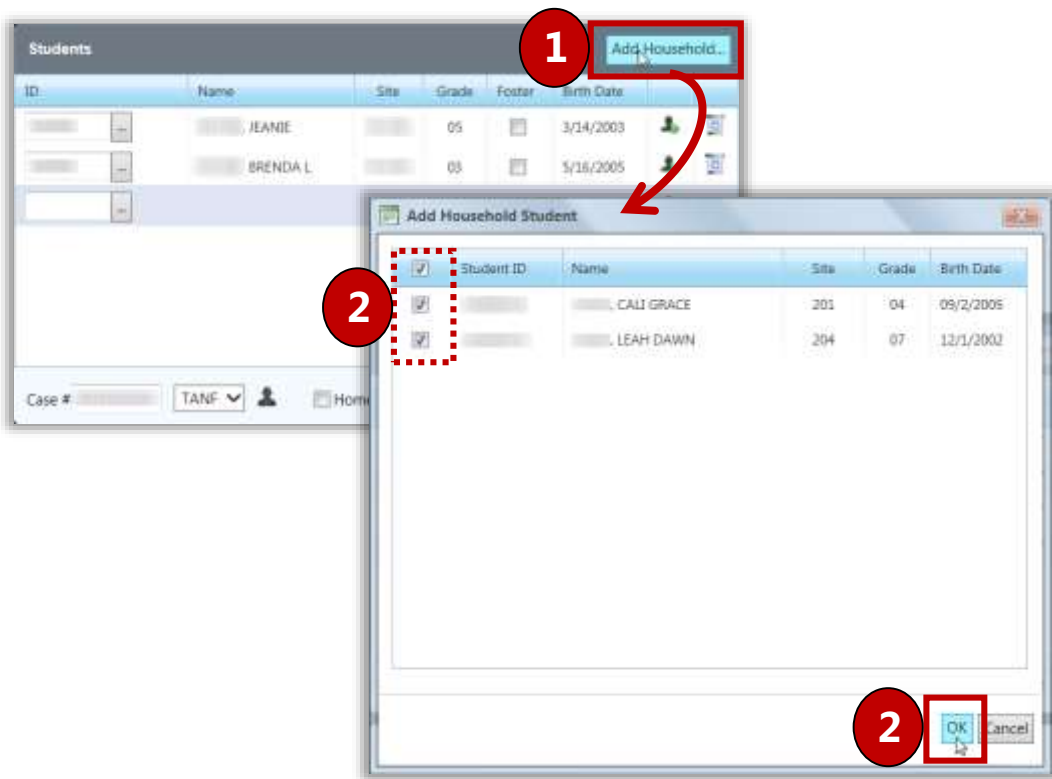
If a Direct Approval option is selected, a message appears to alert you to the proper procedure for processing these types of approvals.



Adding a Household

To add a household

1. Click . A student with an existing household must already be added to the application for the **Add Household** button to be available.
2. Select the household member(s) to be added to the application and click .

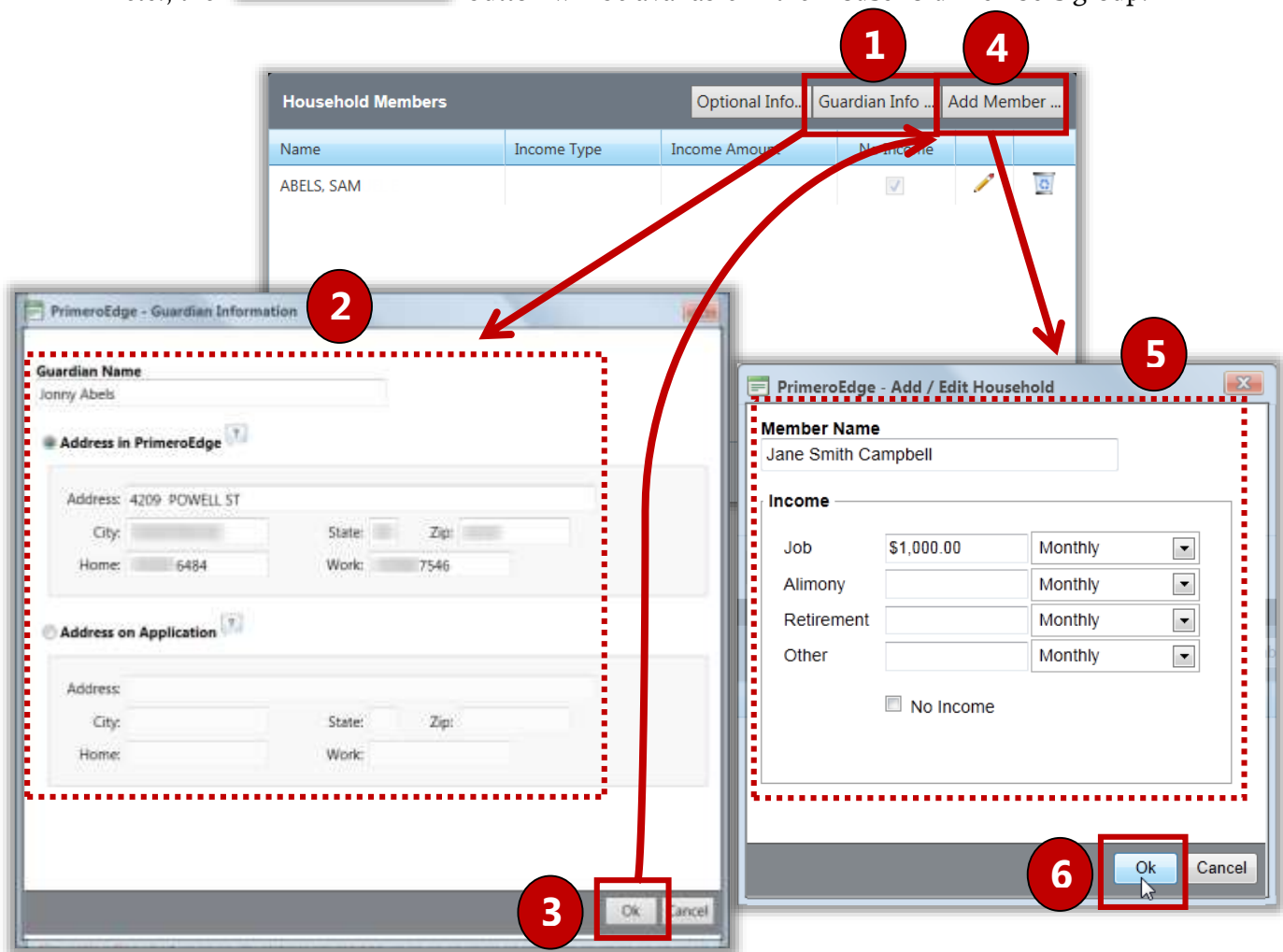


Adding Household Members

To add household members

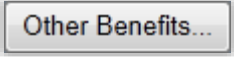
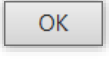
1. Click **Guardian Info ...**.
2. Enter the parent/guardian name and select or enter an address.
3. Click **OK**.
4. In the **Household Members** group, click **Add Member ...**.
5. Enter the member name and enter the income or select **No Income**.
6. Click **OK**.

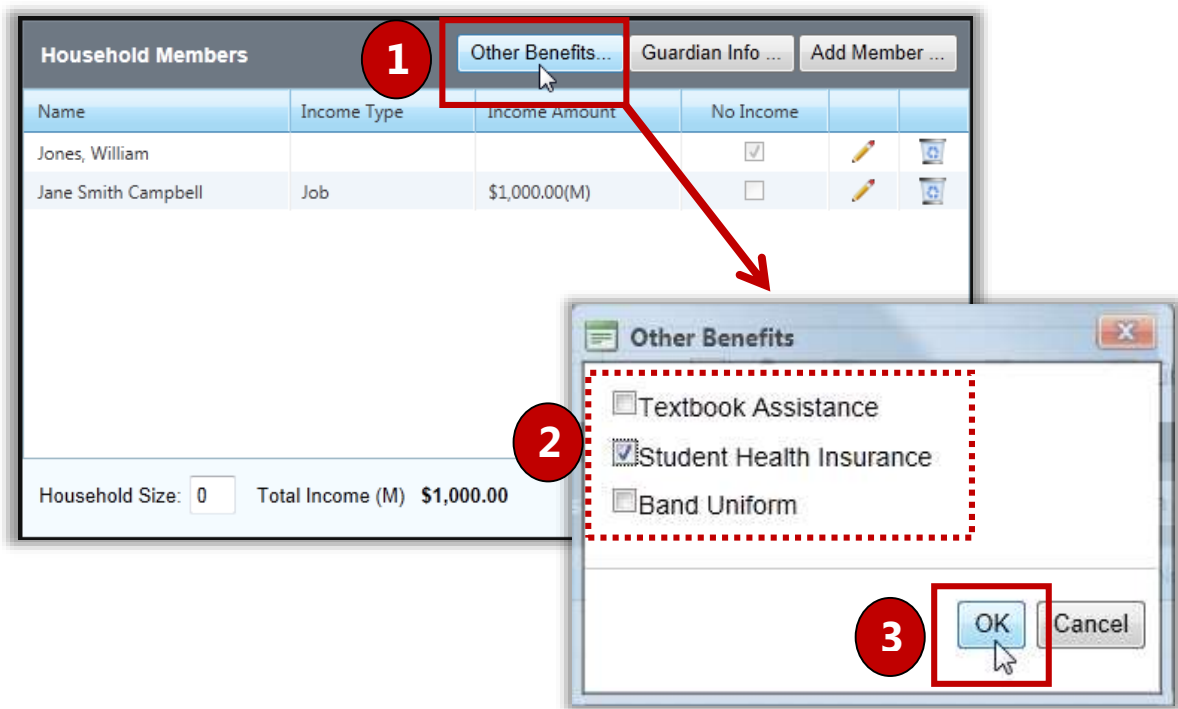
If your district offers other benefits to students, such as health insurance, textbook assistance, etc., the **Other Benefits...** button will be available in the **Household Members** group.



Selecting Other Benefits for the Household

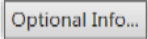

To select other benefits for the household

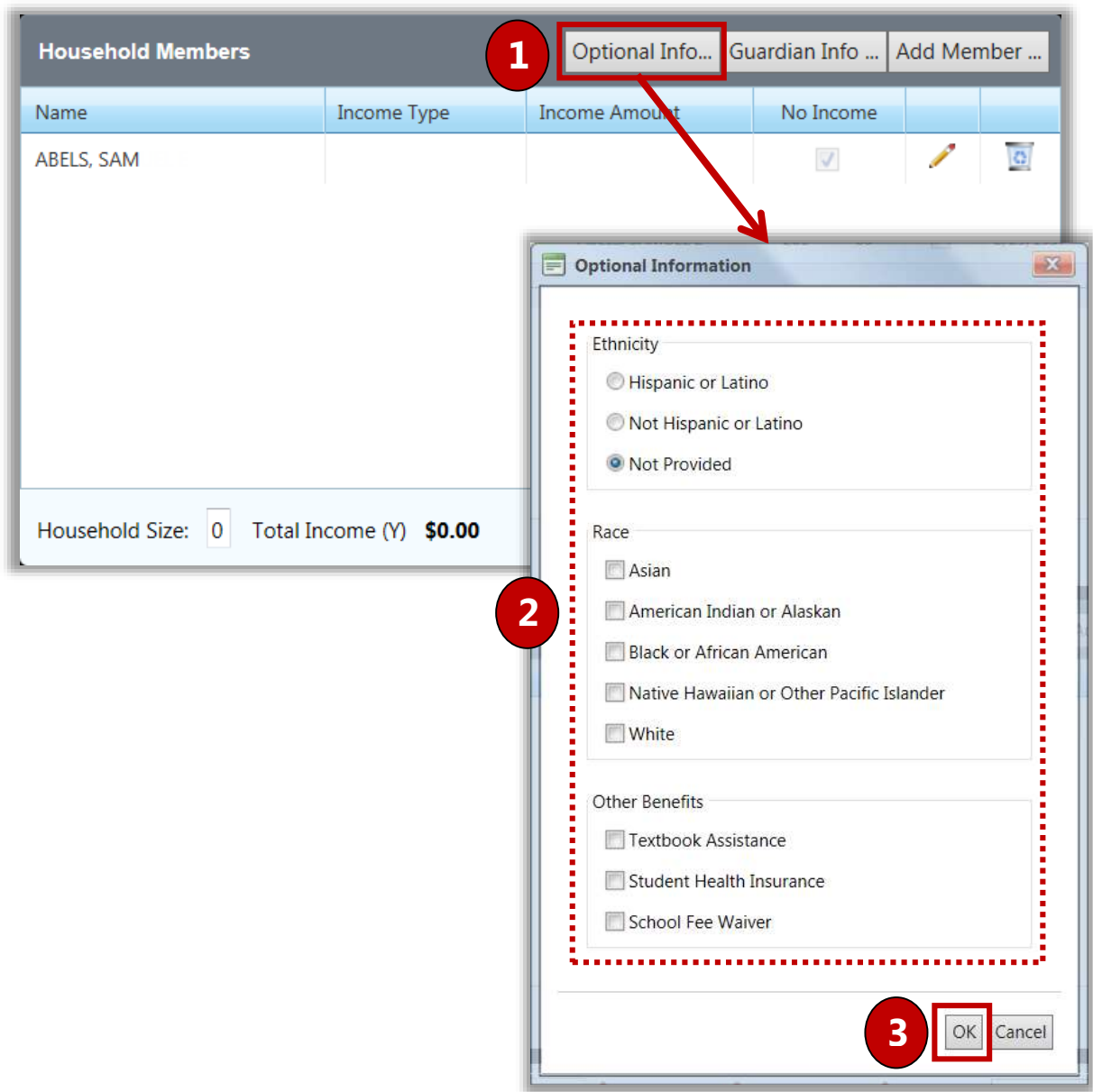
1. Click  .
2. Select one or more benefits.
3. Click  .



Adding Optional Information

To add additional information, such as ethnicity, race, and other benefits

1. Click .
2. Select **Ethnicity**, **Race**, and/or **Other Benefits**.
3. Click .



Adding Application Details

To add application details

1. In the **Details** group, either:
 - Enter the applicant’s Social Security Number, or
 - Select **No SSN**.
2. If the application is signed, select **Signature**.

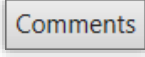

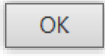
By default, English is selected for language. Make a different selection, if needed.

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

The screenshot shows a web form for adding application details. At the top, there are three fields: 'Applicant SSN:' with an empty text box, a checked checkbox for 'No SSN', and a checked checkbox for 'Signature'. To the right is a 'Language:' dropdown menu currently set to 'English'. A red dashed box highlights the 'Applicant SSN' field and the 'No SSN' checkbox, with a red circle containing the number '1' above it. Another red dashed box highlights the 'Signature' checkbox, with a red circle containing the number '2' above it. Below these fields, the application status is shown as 'Valid' in green text. To the right, a table displays application details: Eligibility (FREE), Basis (CATEGORIC), and Valid Until (7/31/2014). At the bottom left, the application number is 'Application #: 1470'. At the bottom right, there are three buttons: 'Delete', 'Pending Application', and 'Comments*'. The entire form is enclosed in a light blue border.

Adding Comments

To save other information with the application, on the **Validate** window:

1. Click  in the **Details** group.
2. Enter up to 500 characters for comments.
3. Click  .
4. Click  .



Applicant SSN: No SSN Signature Language: English

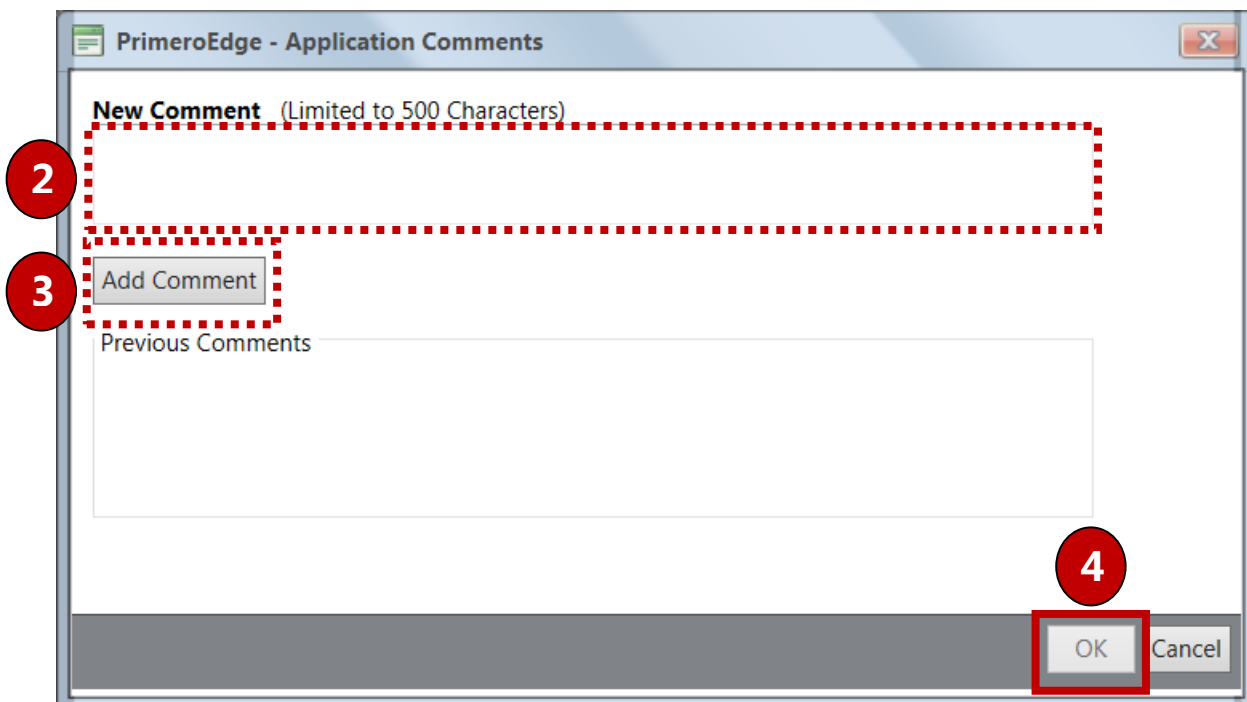
Valid

Eligibility	Basis	Valid Until
FREE	CATEGORIC	7/31/2014

Application #: 1470

Delete Pending Application **Comments***

1 (circled red) points to the **Comments*** button.



PrimeroEdge - Application Comments

New Comment (Limited to 500 Characters)

2 (circled red) points to the text input area.

3 (circled red) points to the **Add Comment** button.

Previous Comments


4 (circled red) points to the **OK** button.

OK Cancel

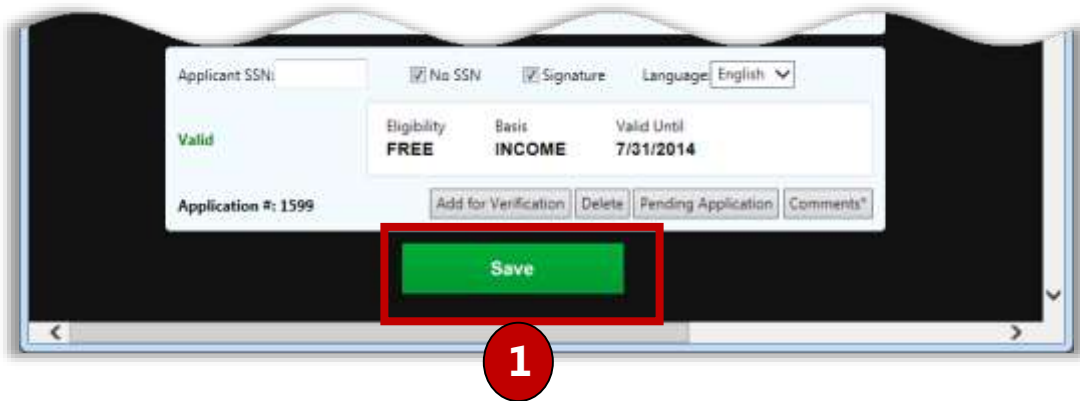
Saving an Application as Complete

When all information from the paper application has been entered into the **Validate** window and all required information has been supplied, the application status is “**Valid**”.

To save an application as complete


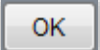
1. Click  .

On the **Manual Entry** page, the application is listed with a status of “Processed”.

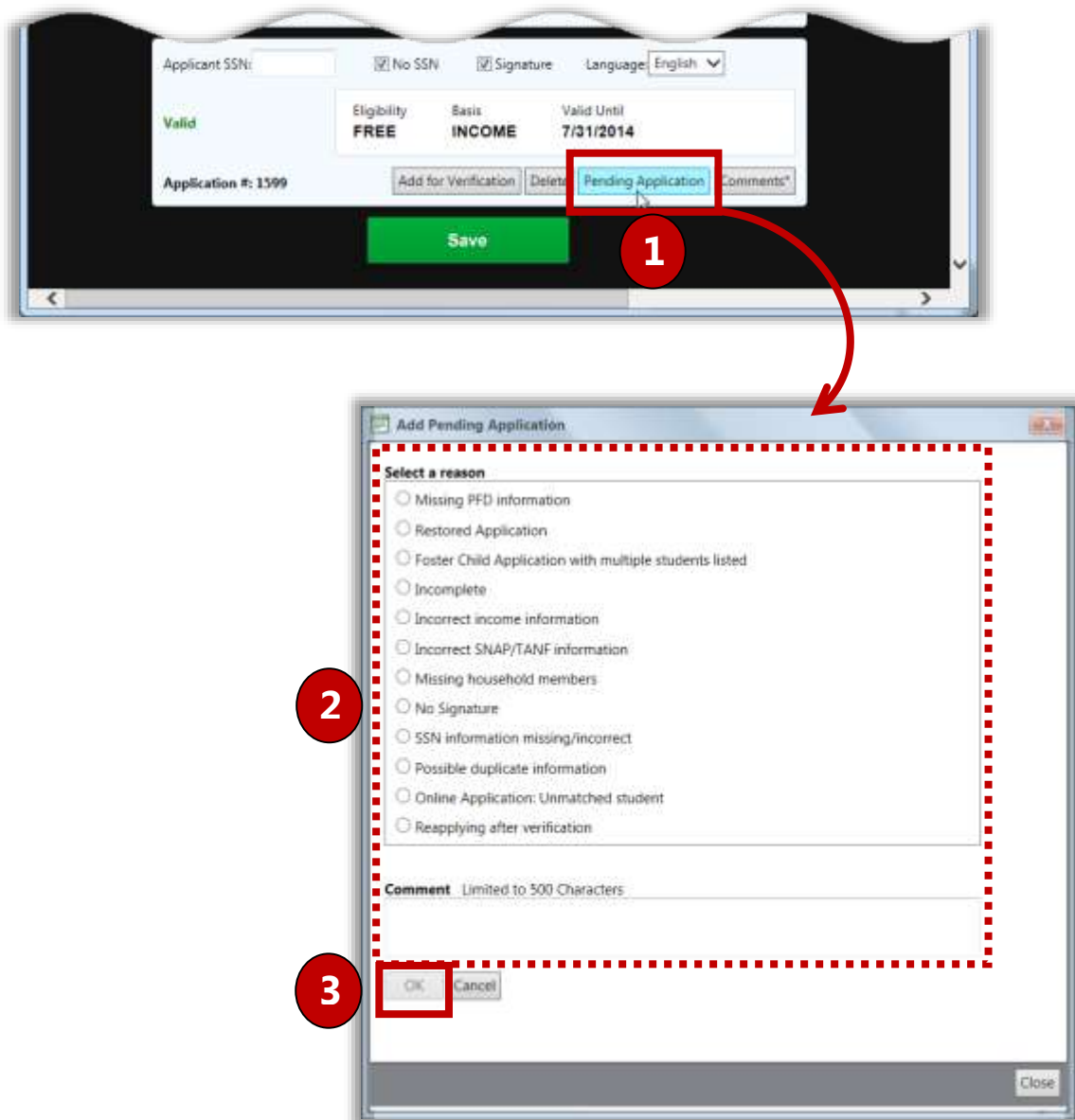


Saving an Application as Pending

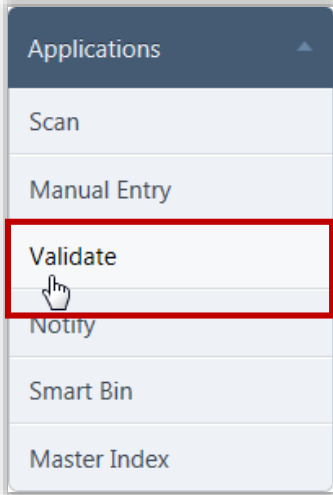
To save the application but not process the application as complete:

1. Click .
2. Select a reason for the pending status (required) and enter comments in **Comments** (required).
3. Click .

The added application is placed in an application batch. The application listing appears in the **Applications in Batch #** list with a status of “Partially Validated”.



Validate



Validation is the process of ensuring that PrimeroEdge recognized the parent’s handwriting correctly and that the application is complete. Unlike scanning, Batch Validation can be done from any computer with access to PrimeroEdge.

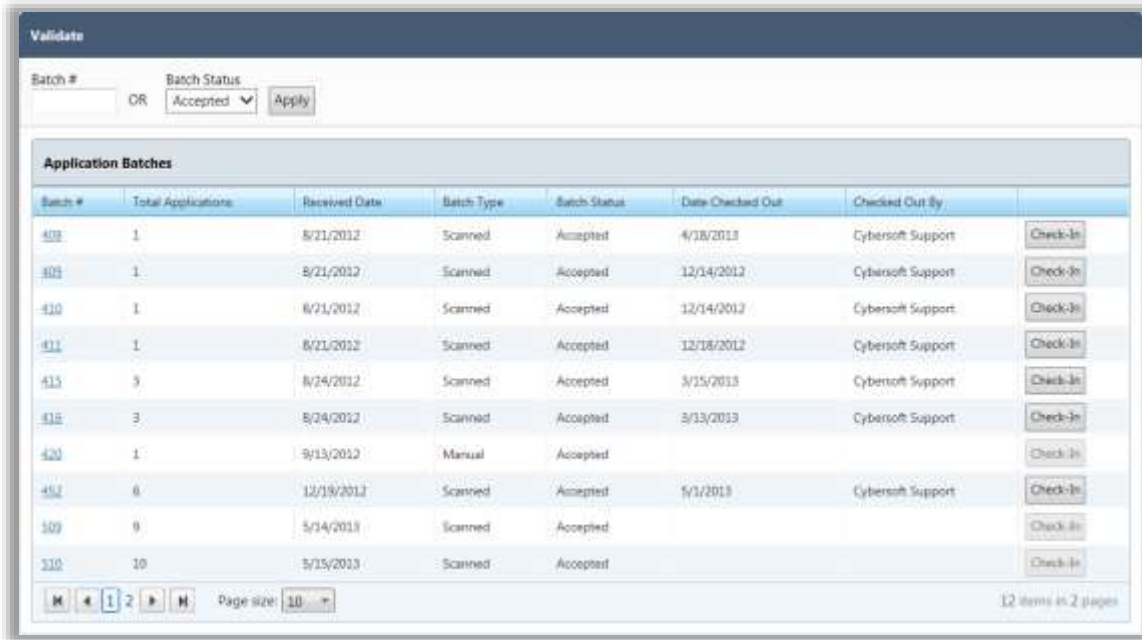
By default, on the **Validate** page:

- Batch # is empty/blank.
- Batch Status is set to “Accepted”.

★ Note

Applications containing 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.

Validate Page



Page Functions

Button	Description
	Displays all batches meeting the search criteria.
	Checks in a batch.

Validating an Application

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

- Application Image (left side) – Move the mouse cursor over the application to magnify hard-to-read or small print.
- Students (top right)
- Household Members (middle right)
- Application Details (bottom right)

The screenshot displays the 'Free and Reduced-Price Meal Household Application for 2013 - 2014' form. The application is for a household with two children, Josie and Brendie Lani. The application is categorized as 'FREE' and 'CATEGORIC'. The total household income is \$3.00. The application is for the school year 2013-2014, with a valid period from 9/9/2013 to 7/31/2014. The application is for a household with two children, Josie and Brendie Lani. The application is for a household with two children, Josie and Brendie Lani. The application is for a household with two children, Josie and Brendie Lani.

Child Name	First Name	DOB	DOB (MM/DD)	Grade	School	Parent with Kinship Status
Josie		3/14/2003	03	DS		
Brendie Lani		5/16/2009	05	ES		

Child Name	Income Type	Income Amount	No. Income
Josie		0.00	0.00
Brendie L.		0.00	0.00

Household Size: 2 Total Income (Y): \$3.00

Application # 1479

Application Category: FREE CATEGORIC

Valid Period: 9/9/2013 - 7/31/2014

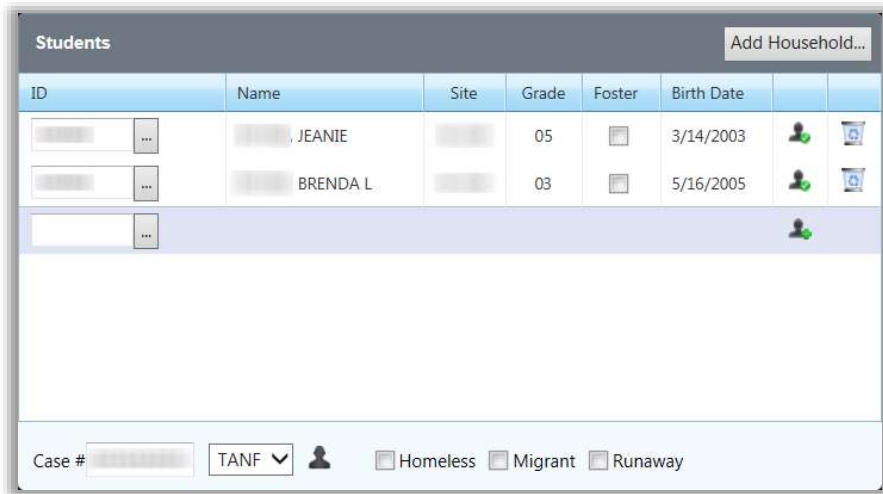
Application # 1479

Buttons: Previous, Save, Save & Next


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.



Student Data

Field	Description
ID	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 and the  icon is shown.
Name	Student’s name as it appears in the student record
Site	Numeric school identifier
Grade	Student’s grade level
Foster	Student’s foster status
Birth Date	Student’s birth date as stored in the student record

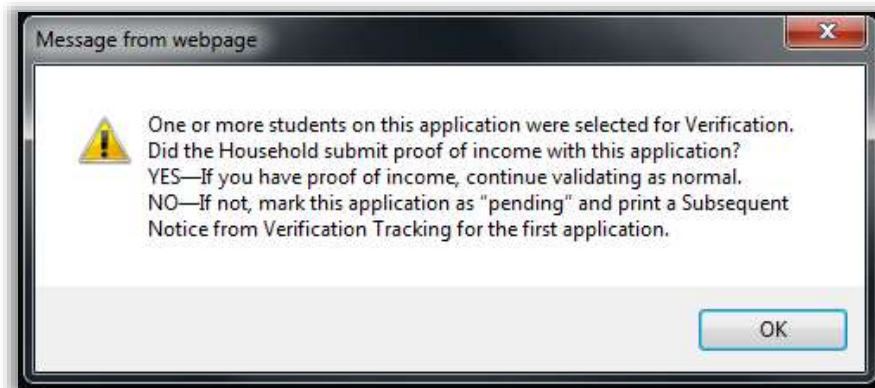
Field	Description
(Approval status)	<p>Application approval status and reason (hover the mouse cursor over the icon).</p> <ul style="list-style-type: none">  Add new pending student; click to display the Add Pending Student popup.  Pending student; click to display the Add Pending Student popup.   No 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 Primero.  Student already has an approved status for this year; If a student listed on the application is Directly 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
(Delete Student)	Click Delete () to remove the student listing from the Students group
Case#	Student's family identifier for the Supplemental Nutritional Assistance Program (SNAP)/Temporary Assistance for Needy Families (TANF) programs; enter the identifier and select the identifier type
	Click to add or view beneficiary name; if the applicant is receiving benefits, the beneficiary name must be included with the application.
	Direct approval options; these options cannot be selected on this page; direct approval status is designated when the student(s) is processed through direct approval activities.

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.



Adding 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.

To add a student

To add a student, in the **Students** group:

1. Enter the Student ID in the **ID** field: enter the entire ID or just the last 4-5 digits.

-or-

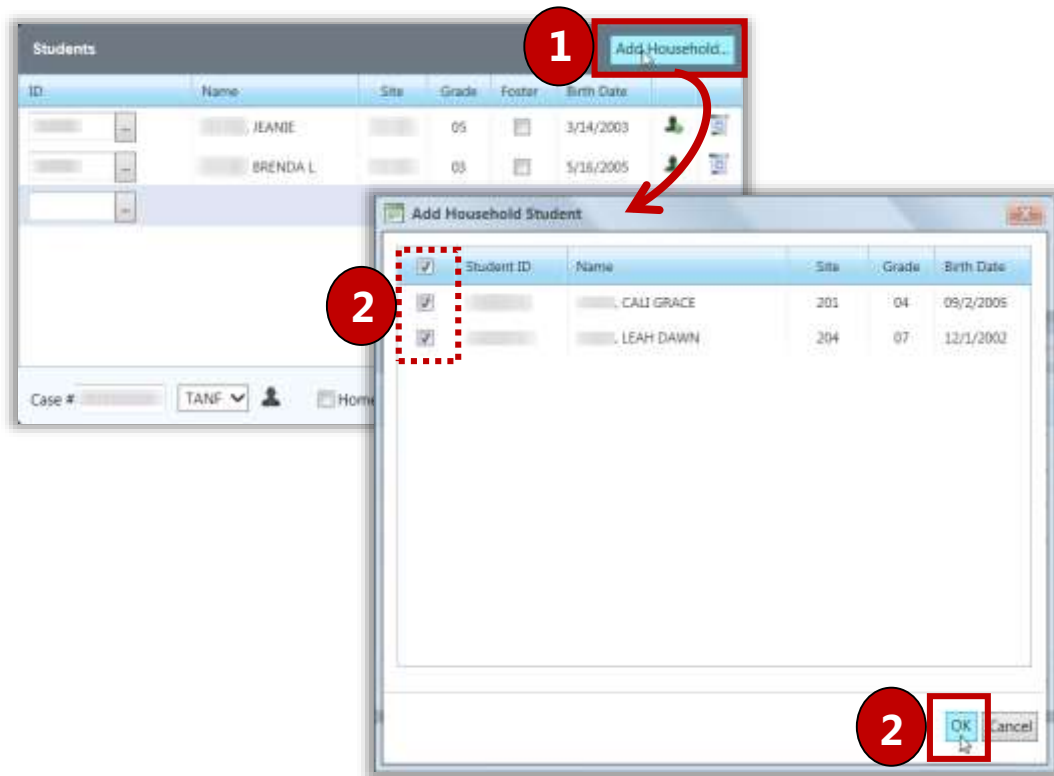
Click **Lookup** () to open the **Lookup** popup.

Adding a Household

To add a household

To add a household, in the **Students** group:

1. Click . A student with an existing household must already be added to the application for the **Add Household** button to be available.
2. Select the household member(s) to be added to the application and click .



Adding a Pending Student

To add a pending student

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

In the **Add Pending Student** popup:

1. Enter student information.
2. Click to save.

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

Removing Students

To remove students


To remove a student, click **Delete** () in a student listing.

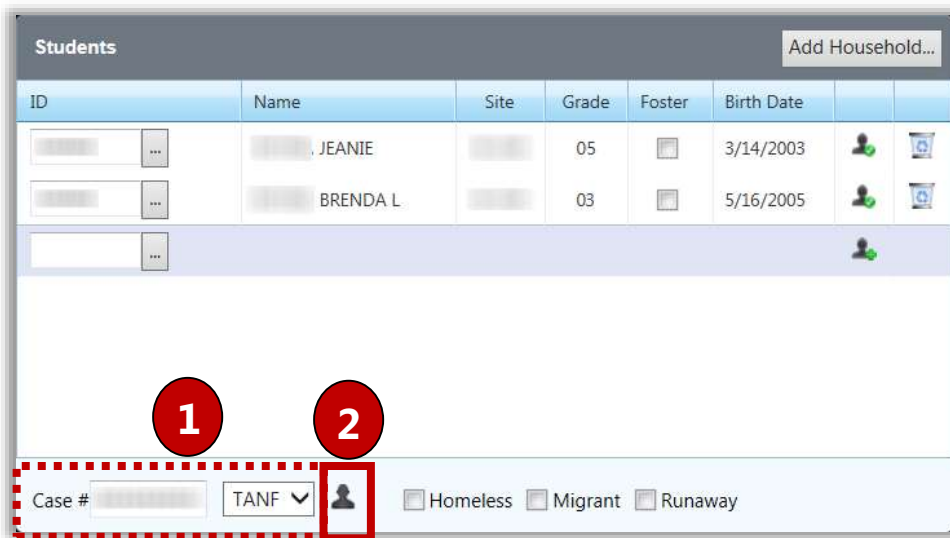
A student is removed when the wrong Student ID was written on the application, the wrong student was accidentally selected, or when the handwriting on the application was so large that it took up two lines and the system interpreted this to be two students.

Adding SNAP/TANF Benefits


Only one SNAP or TANF identifier is entered on an application when the System setting [Application has one TANF# for all students](#) is set to “Yes”. Household Members and information do not have to be entered. The application must be signed by an adult.

To add SNAP/TANF benefits

1. In **Case #**, enter a SNAP/ TANF number and select the benefit type.
2. Click **Add Beneficiary** () and enter the applicant’s name.



ID	Name	Site	Grade	Foster	Birth Date		
<input type="text"/>	JEANIE		05	<input type="checkbox"/>	3/14/2003		
<input type="text"/>	BRENDA L		03	<input type="checkbox"/>	5/16/2005		
<input type="text"/>							

Case # TANF  Homeless Migrant Runaway

Homeless, Migrant, Runaway

Processing an application with one of these options selected is discussed in the Direct Approvals portion of Section 3. This type of application should be removed from the batch—they are scanned in a different function of PrimeroEdge.

Application 1334 (8 of 10) Batch: 373

Free and Reduced-Price Meals Household Application for 2011 - 2012 — West Virginia Dept. of Education
USE BLACK OR DARK BLUE INK. PRINT NEATLY. COMPLETE ONE APPLICATION PER HOUSEHOLD.

PART 1 — Names of ALL Children in School

Last Name	First Name	MI	Date of Birth (Optional)	Mark if Foster	Grade	School	Student WEIS # (Public Schools)
<i>Income</i>							
	Addison		08 02 05		PK		9632
	Dalen		07 23 01		03		3939
	Kassidy		02 11 99		06		2993

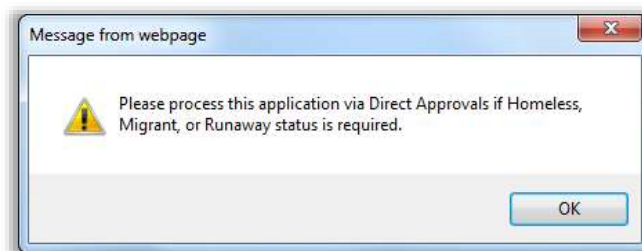
PART 2 — SNAP/TANF NUMBER
 SNAP TANF

PART 3 — HOMELESS, MIGRANT, RUNAWAY
 Homeless Migrant Runaway

PART 4 — HOUSEHOLD MEMBERS AND GROSS INCOME FROM LAST MONTH
 Household Size (Number of people living in your house): 05

1. Name (Last, First) 2. Mark Box if No Income 3. Income and how often it is received: W = Weekly, E = Every 2 weeks, T = Twice per month, M = Monthly

If any of the Direct Approval options are selected in the Validation Workspace, a message appears to alert you to the proper procedure for processing these types of approvals.



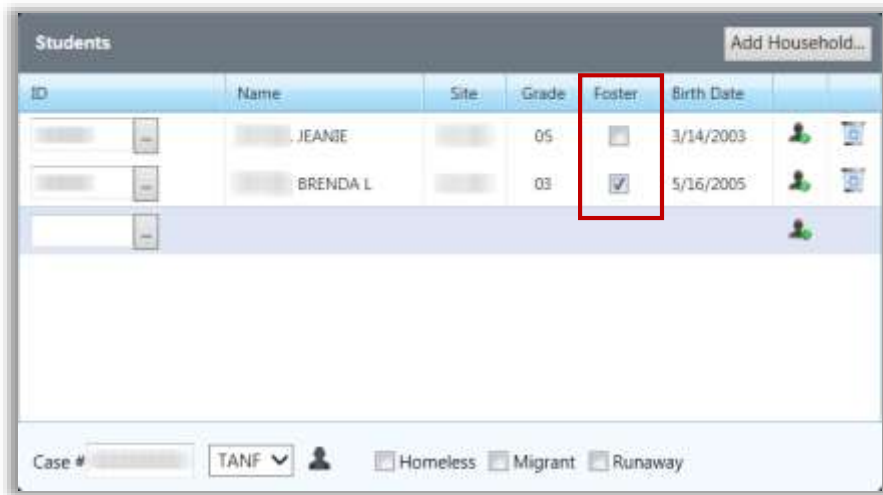
Foster Student

When Foster Student is selected for any student (check mark applied):

- 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.

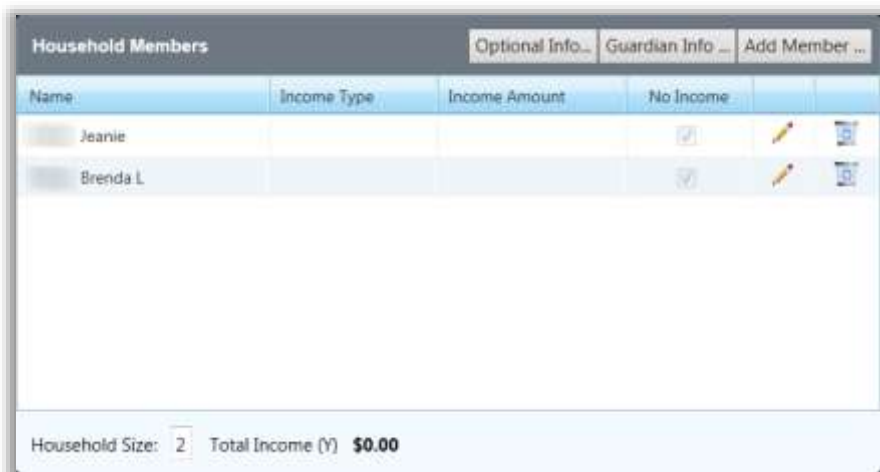
If all students on the application are marked “Foster”, then application is a “Foster” application with all students assigned “Free” eligibility with a “Foster” basis.



Household Members Group

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

- Click **Add Member ...** to add new members.
- Click **Edit** () to change a member name or income.
- Click **Delete** () to remove a member.



Adding Household Members

To add a household members

1. Click .
2. In **Member Name**, enter the
3. In the **Income** group, either:
 - Enter the income(s) received by the household member, or
 - Select **No Income** if the member does not receive any income.
4. Click .

The screenshot shows the 'Household Members' application interface. At the top right, there is a button labeled 'Add Member ...' circled in red with a red circle containing the number '1'. Below this is a table with columns: Name, Income Type, Income Amount, No Income, and an action column. The first row contains 'ABELS, SAM' and a checked 'No Income' box. A dialog box titled 'Primero - Add / Edit Household' is open in the foreground. It has a 'Member Name' field containing 'Member 1', circled in red with a red circle containing '2'. Below that is an 'Income' section with four rows: 'Job' (\$1,722.00, Twice a Month), 'Alimony' (\$0.00, Monthly), 'Retirement' (\$0.00, Monthly), and 'Other' (\$0.00, Monthly). Each row has a dropdown menu. At the bottom of the dialog box is a 'No Income' checkbox. The 'Ok' button at the bottom right of the dialog box is circled in red with a red circle containing '4'. A red arrow points from the 'Add Member ...' button in the main window to the dialog box.

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.

Household Size

Household size is the total number of people listed on the application. 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.

In the **Household Members** group, click  to view the address and phone number info PrimeroEdge recognized from Part 5 of the application.

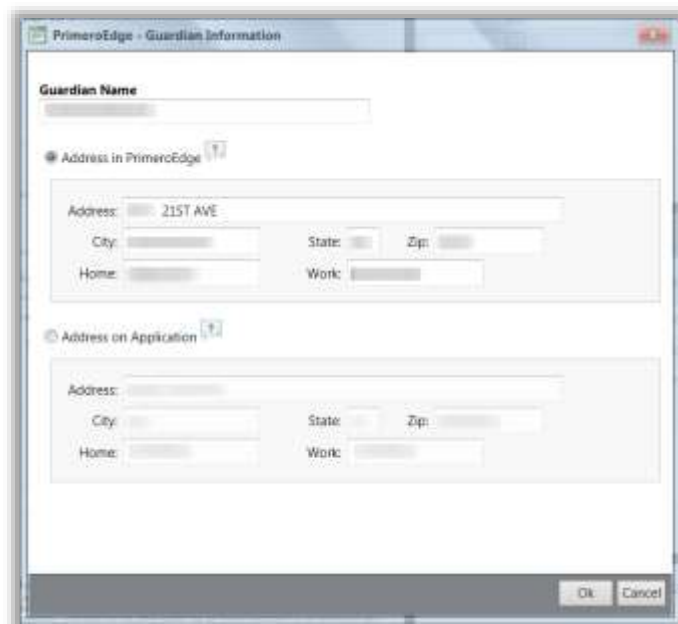
Guardian Information

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.



Application Details

The **Application Details** group of the Validation Workspace allows the user to edit the **Applicant SSN**, **Signature** checkbox, **Language** and any other errors that make the application invalid. The application validity and status determination are displayed in this area.

Applicant SSN: No SSN Signature Language: English

Received Date: 9/9/2013

Eligibility	Basis
Valid	FREE CATEGORIC
Valid Period	
9/9/2013 - 7/31/2014	

Application #: 1470

In the **Application Details** group:

- In **Applicant SSN**, only the last four digits of the adult social security number is required.
- In **No SSN**, select or clear as needed.
- In **Signature**, select if the application is signed or clear if unsigned.
- In **Language**, select a language.
- In **Received Date**, enter the date the application was received.

PrimerEdge reads the application language based on the barcode included on the application.

Notifications and other FRE related documents are printed in the language selected here.

If the button displays an “*”, previous comments have been saved with the application.

Completing Validation




When all information on the application is complete, you can do one of the following:

- Delete
- Place the application in Pending
- Add comments
- Add the application for verification processing





Deleting an Application

To delete an application

In the **Application Details** group:

1. Click  to remove the application. A warning message is displayed indicating the results of deleting an application.
2. Click  to continue.
3. Click  to return to the Validation Workspace.

The **Delete Application** popup displays.

4. Select the reason for deleting the application.
5. Enter **Comments**.
6. Click  to delete the application.
7. Click , , or  to close the **Delete Application** popup and return to the Validation Workspace to not delete the application.

After an application is deleted, it can only be accessed via the Smart Bin which is explained later in this manual.


Saving an Application as Pending

To save an application as pending

If an application does not have enough information to make a determination, it can be marked

“Pending” by clicking  .

In the **Add Pending Application** popup:

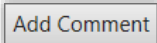
1. Select a reason for pending the application.
2. In **Comments**, enter text describing the reason for pending the application.
3. Click  .

Adding Comments

Comments are attached to an application by clicking  .

To add comments

In the **Application Comments** popup:

1. In **New Comment**, enter comment text.
2. Click  .

★ Note

The date, time, and username are listed with the comment text in the **Previous Comments** group. Previous Comments cannot be edited or removed.

Saving an Application as Complete

To save an application as complete



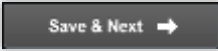
When an application has a status of “Valid” and an Eligibility determination is made, it is ready to be saved.

If you ask to save changes when the application status is not designated “Valid”, the system automatically marks the application as “Pending” and the **Add Pending Application** popup appears with the reason for the pending status selected.

You must enter comment text before clicking  . Otherwise an error message appears.



The screenshot shows a software interface for managing applications. At the top, there are fields for 'Applicant SSN', 'Received Date' (9/9/2013), and 'Language' (English). Below these, a table displays eligibility information: 'Valid' status, 'FREE' eligibility, 'CATEGORIC' basis, and a 'Valid Period' of '9/9/2013 - 7/31/2014'. The 'Application #' is 1620. At the bottom, there are three main navigation buttons: 'Previous' (blue), 'Save' (green), and 'Save & Next' (green with a right arrow). A secondary row of buttons includes 'Add for Verification', 'Delete', 'Pending Application', and 'Comments*'. The 'Save' and 'Save & Next' buttons are highlighted with red boxes in the subsequent list.

- Click  to save changes and close the Validation Workspace.
- Click  to save changes and display the next application in the batch in the Validation Workspace window.
- A grayed button () is shown for the last application in the batch (unavailable). To save changes and close the application, you must click



Viewing 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.

Application #	Eligibility	Base	Application Status	User	Date	Email	Print
1618	Free	Categorical	Processed		02/26/2014		
1619	Reduced	Income	Processed		01/03/2014		
1620	Free	Categorical	Processed		02/25/2014		
1621	Denied	Income	Processed		02/26/2014		
1622	Denied	Income	Processed		03/03/2014		
1623			Accepted		09/09/2013		

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.

Click [Check-In Batch](#) to check in a batch to allow others access before validation is complete.

Starting Validation

On the **Batch Summary** page, to begin the 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.

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 in a later section of this manual.
2. Click **Batch Cover Sheet** to display a summary of applications scanned in this batch. This report is described in a later section of this manual.

Batch Summary

[Back to Batch List](#)

[Check-In Batch](#) [Continue Validating this Batch](#)

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

Batch Summary

Batch #: 574 Total Free: 2
Total Applications: 6 Total Reduced: 1
Total Processed: 5 Total Paid: 2

Application Summary

Application #	Eligibility	Base	Application Status	User	Date	<input type="checkbox"/> Email	<input type="checkbox"/> Print
1618	Free	Categorical	Processed		02/26/2014		
1619	Reduced	Income	Processed		01/03/2014	<input type="checkbox"/>	<input type="checkbox"/>
1620	Free	Categorical	Processed		02/25/2014		<input type="checkbox"/>
1621	Denied	Income	Processed		02/26/2014	<input type="checkbox"/>	<input type="checkbox"/>
1622	Denied	Income	Processed		01/01/2014		<input type="checkbox"/>
1623			Accepted		09/09/2013		

Notifying a Batch

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, select the **Print** check box and click

Notify

To email notification letters to guardians, select the **Email** check box and click **Notify**.

Note – The **Email** check box is only available for applications that 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](#) [Continue Validating this Batch](#)

There are applications in this batch that are not processed.

Batch Summary

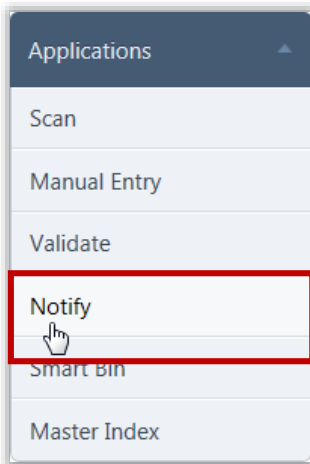
Batch #: 576 Total Free: 2
Total Applications: 6 Total Reduced: 1
Total Processed: 5 Total Paid: 2

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

Application Summary

Application #	Eligibility	Base	Application Status	User	Date	<input type="checkbox"/> Email	<input type="checkbox"/> Print
1618	Free	Categorical	Notified		05/01/2014		<input type="checkbox"/>
1619	Reduced	Income	Notified		05/01/2014	<input type="checkbox"/>	<input type="checkbox"/>
1620	Free	Categorical	Notified		04/23/2014		<input type="checkbox"/>
1621	Denied	Income	Notified		05/01/2014	<input type="checkbox"/>	<input type="checkbox"/>
1622	Denied	Income	Notified		04/22/2014		<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).

Note

Students enrolled in sites participating in CEP are excluded from application notification letters. Applications containing CEP-eligible students are sent to the Smart Bin without being processed.

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



- **Batch Status** is set to “Processed”.

Notify Page

 A screenshot of the 'Notify' page in a software application. At the top, there is a 'Batch Status' dropdown menu set to 'Processed' and an 'Apply' button. Below this is a table titled 'Batch to Notify'. The table has columns for 'Batch #', 'Total Applications', 'Received Date', 'Checked Out By', 'Date Checked Out', 'Batch Type', 'Email', and 'Print'. The table contains 10 rows of data. At the bottom of the table, there are navigation controls including 'M', '1', '2', 'M', and a 'Page size' dropdown set to '10'. The text '14 items in 2 pages' is visible in the bottom right corner.

Batch #	Total Applications	Received Date	Checked Out By	Date Checked Out	Batch Type	Email	Print
561	2	8/22/2013			Manual	<input type="checkbox"/>	<input type="checkbox"/>
580	1	9/12/2013			Manual	<input type="checkbox"/>	<input type="checkbox"/>
583	3	9/23/2013			Manual	<input type="checkbox"/>	<input type="checkbox"/>
551	3	9/23/2013			Scanned	<input type="checkbox"/>	<input type="checkbox"/>
606	1	12/5/2013			Manual	<input type="checkbox"/>	<input type="checkbox"/>
611	1	12/23/2013			Manual	<input type="checkbox"/>	<input type="checkbox"/>
625	3	2/17/2014			Manual	<input type="checkbox"/>	<input type="checkbox"/>
611	1	2/28/2014			Manual	<input type="checkbox"/>	<input type="checkbox"/>
645	1	3/25/2014			Manual	<input type="checkbox"/>	<input type="checkbox"/>
645	2	3/26/2014			Manual	<input type="checkbox"/>	<input type="checkbox"/>

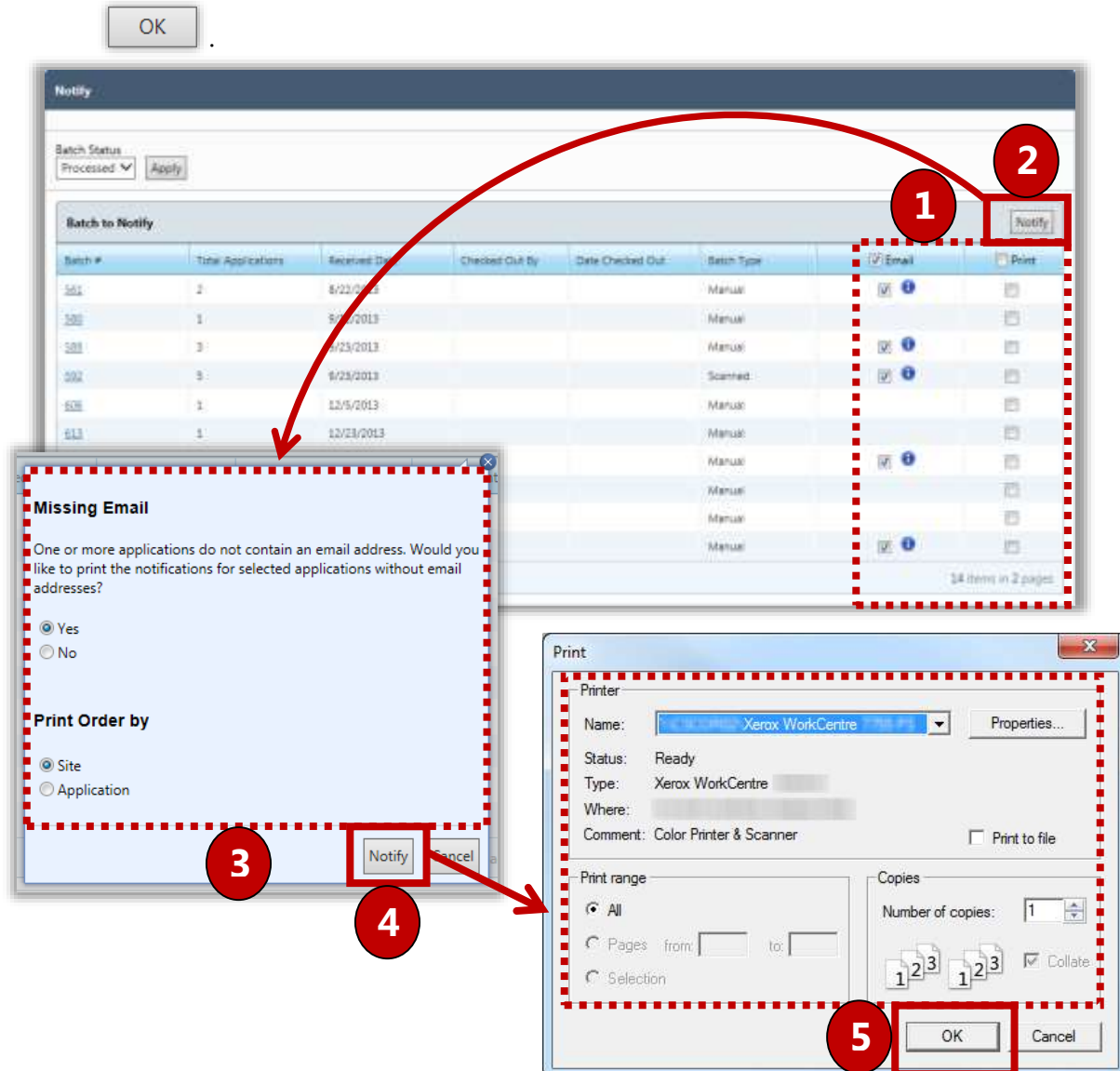
Page Functions

Button	Description
	Displays all batches meeting the search criteria.
	Notifies the guardian by either printing or emailing the notification letter. Displays when Email or Print check boxes are selected.

Notifying Batch Applications

To notify batch applications

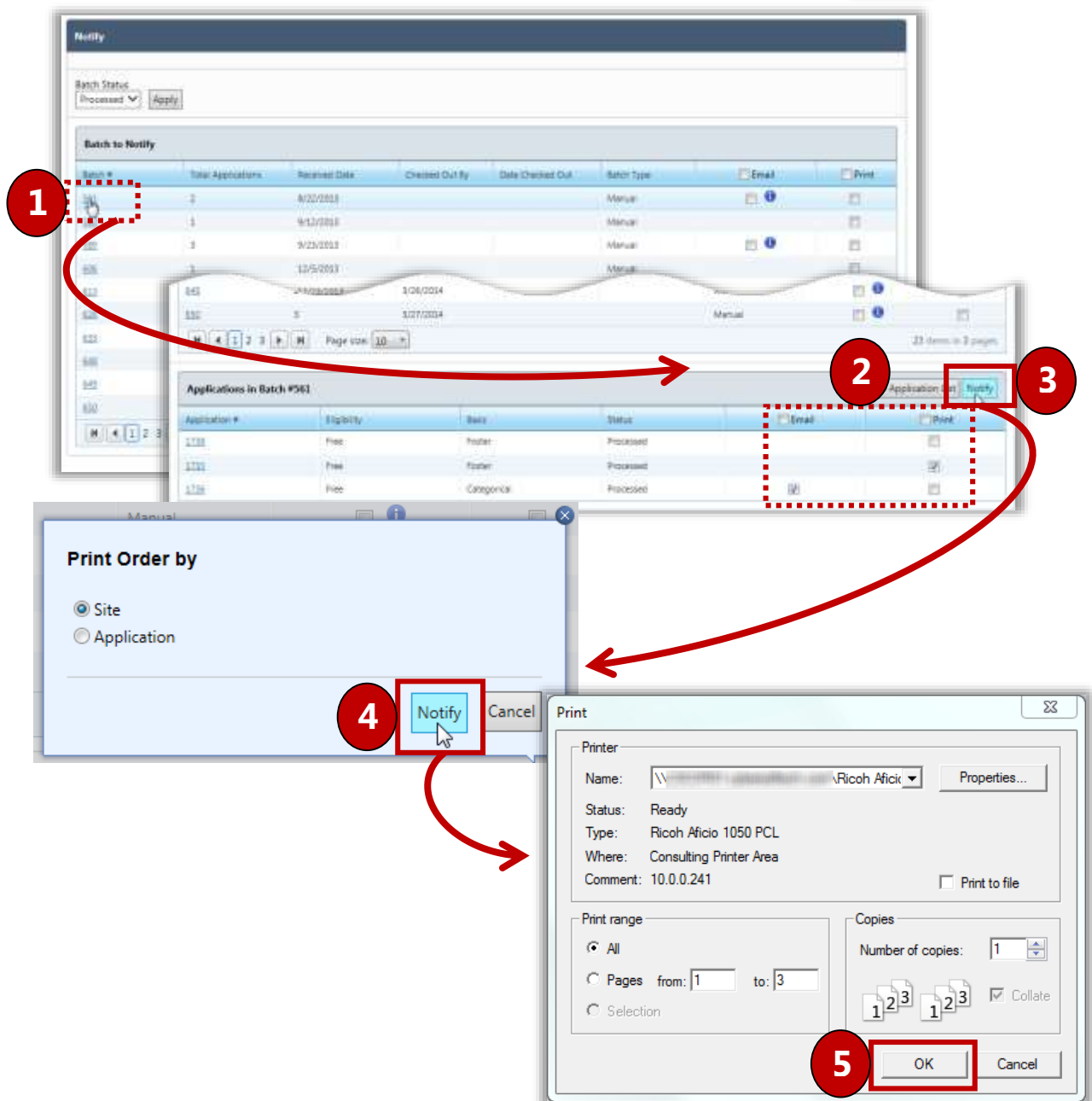
1. Select in the **Email** or **Print** column to send the corresponding notification. If the **Email** check box in the column header is selected but the **Print** check box in the column header is not selected, all applications with email addresses will be notified by email and the rest can be printed.
2. Click .
3. Select one print order option and, if applicable, select when applications with missing email addresses should be printed instead of being emailed.
4. Click .
5. *For Printing:* Select the printer and any necessary settings in the printer dialog, and click .



Notifying Selected Applications

To notify selected applications

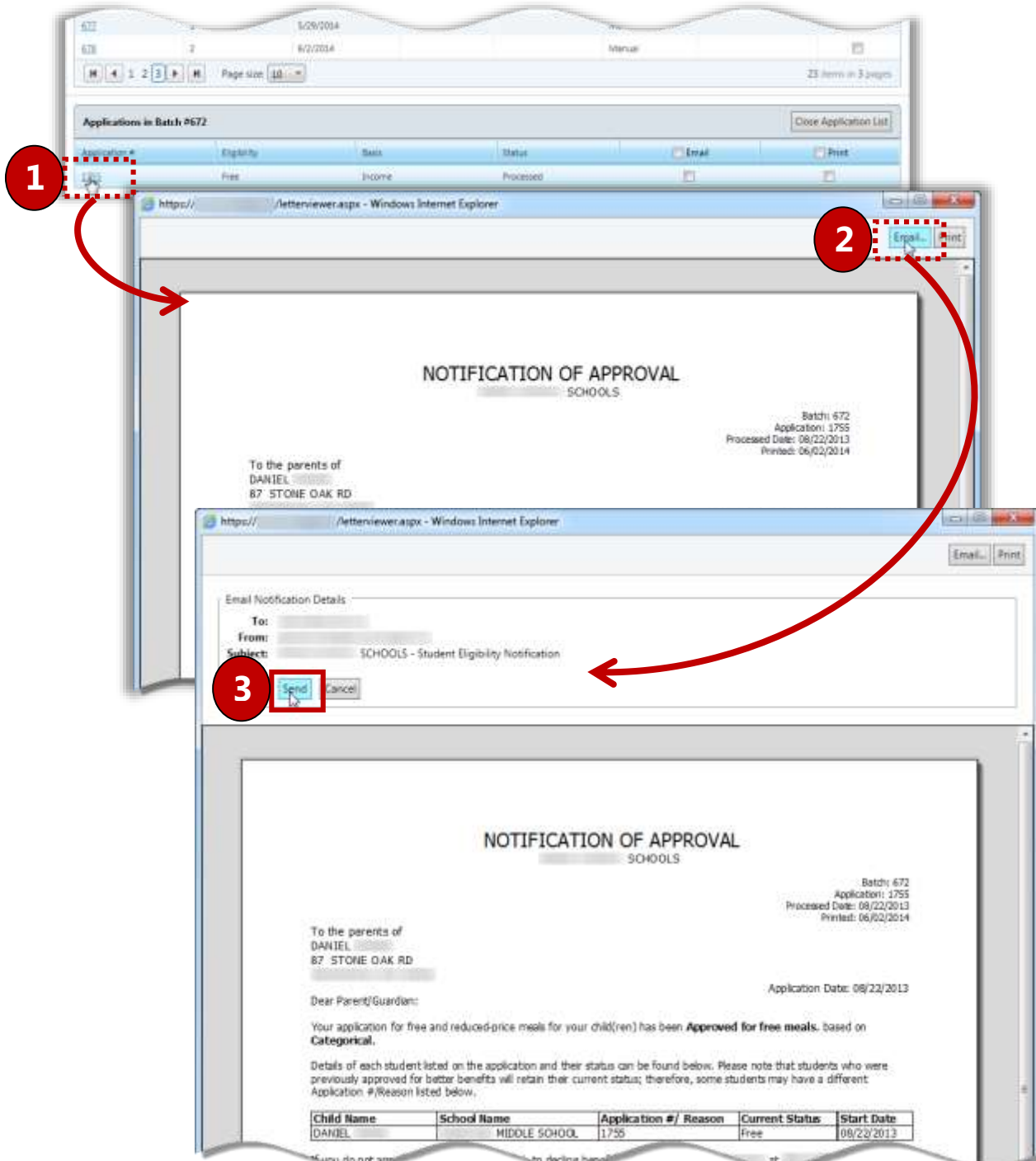
1. Click the [Batch #](#) link in the **Batch #** column.
2. Click in **Email** for each letter that is to be emailed and click in **Print** for each letter that is to be printed.
3. Click .
4. *For Printing:* Select the print order and click .
5. *For Printing:* Select the printer and other necessary settings and click .



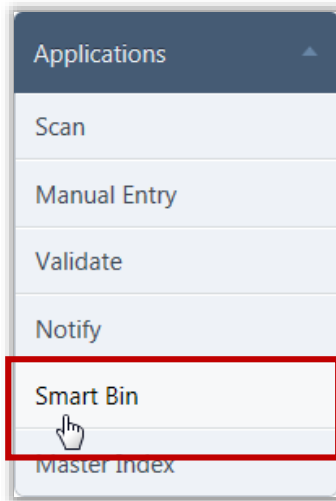
Sending Notification from the Letter Viewer

To send notifications from the Letter Viewer

1. Click the [Applications #](#) link in the **Application #** column.
2. Click .
3. Select the print order and click .



Smart Bin



Smart Bin collects applications that were not processed for various reasons. These applications can be opened and modified.

Applications sent to the Smart Bin include:

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

By default, on the **Smart Bin** page:

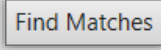
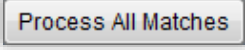
- **Pending Students** is selected.
- **All** is selected in the display options group.

Smart Bin Page

 A screenshot of the 'Smart Bin' page in a web application. 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 titled '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 page 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
		Jon		4	6/27/2006	1409	Partially Validated	✓	...
		Peter		PK	12/21/2011	1406	Partially Validated	✓	...
		Brenda		4	5/15/2003	1470	Partially Validated		...
		Jeanie		6	3/13/2001	1470	Partially Validated		...
		William		11	6/23/1995	1412	Processed	✓	...

Page Functions


Button	Description
	Click to display students matching validation criteria.
	Click to update the Validation Workspace and assign eligibility determination to the matched students.

Page Options

Option Button	Description
Pending Students	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.
Pending Applications	Displays all applications marked as Pending during validation. When additional information is received so that the validation process can be completed, the application is processed through the Smart Bin.
Deleted Applications	Displays applications deleted from the Validation Workspace window. Deleted applications can be viewed and restored using this option.
CEP Pending Students	Displays students enrolled at CEP-eligible sites who were also included on an application. These students' applications can be processed if the student transfers to a non-CEP-eligible site.
CEP Pending Applications	Displays applications that included students enrolled at CEP-eligible sites. These applications can be viewed, validated, and deleted using this option. If the student transfers to a non-CEP-eligible site, their application can then be processed.


Processing Pending Students


To process pending students


1. Select **Pending Students**.
2. In a student listing, click **Edit** ().

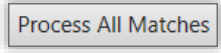


The **Smart Bin** page expands.

3. Make changes as needed and click **Update** to save changes.

When information provided at the time of validation appears to match a student in PrimeroEdge, the **Caution** () icon is displayed in **Matched**.

Click  in the student listing to search and confirm a match using the process described in Validate (see pages 34—47).

A green check mark () is displayed 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.

4. Click  to update the Validation Workspace and assign the eligibility determination to this student.
5. Click  to print the letter(s) now, or
Click  to print the letter(s) at a later date.

1 Pending Students Pending Applications Deleted Applications CEP Pending Students CEP Pending Applications

2 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
		Jon		4	6/27/2006	1409	Partially Validated		
		Peter		PK	12/21/2011	1406	Partially Validated		
		Brenda		4	5/15/2003	1470	Partially Validated		

3 Student ID: Last Name: First Name: Jon Grade: Site Code: Site: Grade: -- SELECT -- Birth Date: 6/27/2006 Update Cancel


4 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
		Jon		4	6/27/2006	1409	Processed	✓	
		Peter		PK	12/21/2011	1406	Partially Validated		
		Brenda		4	5/15/2003	1470	Partially Validated		


5 Do you want to print notifications for the matching students? No Yes


Viewing Application Information and Processing Pending Applications

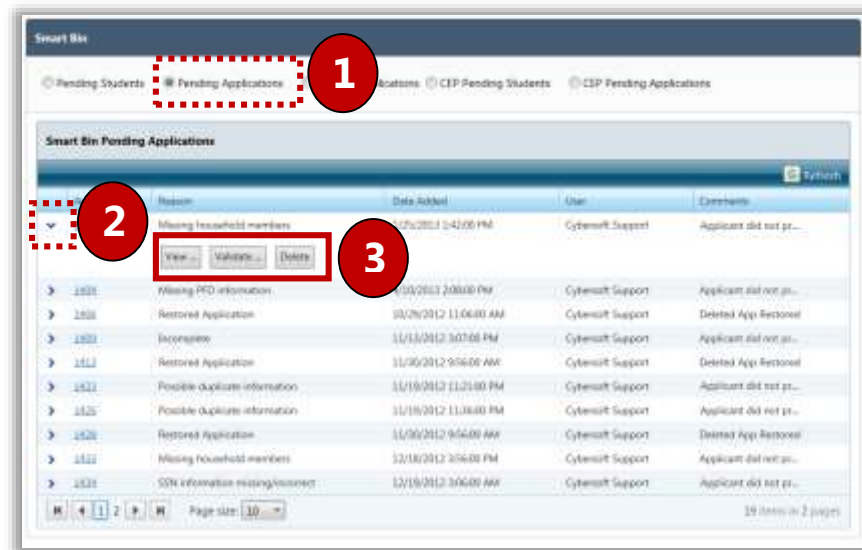
To view application information and process pending applications

1. Select **Pending Applications**.
2. Click **Expand** () to show options for working with the pending application.
3. Perform one or more of the following actions:

Click  to display the application in the **View Application** window.

Click  to open the application in the Validation Workspace to complete the validation process.


Click  to delete the application.



Validating an Application

Clicking  displays the application in the Validation Workspace.

In the Validation Workspace:

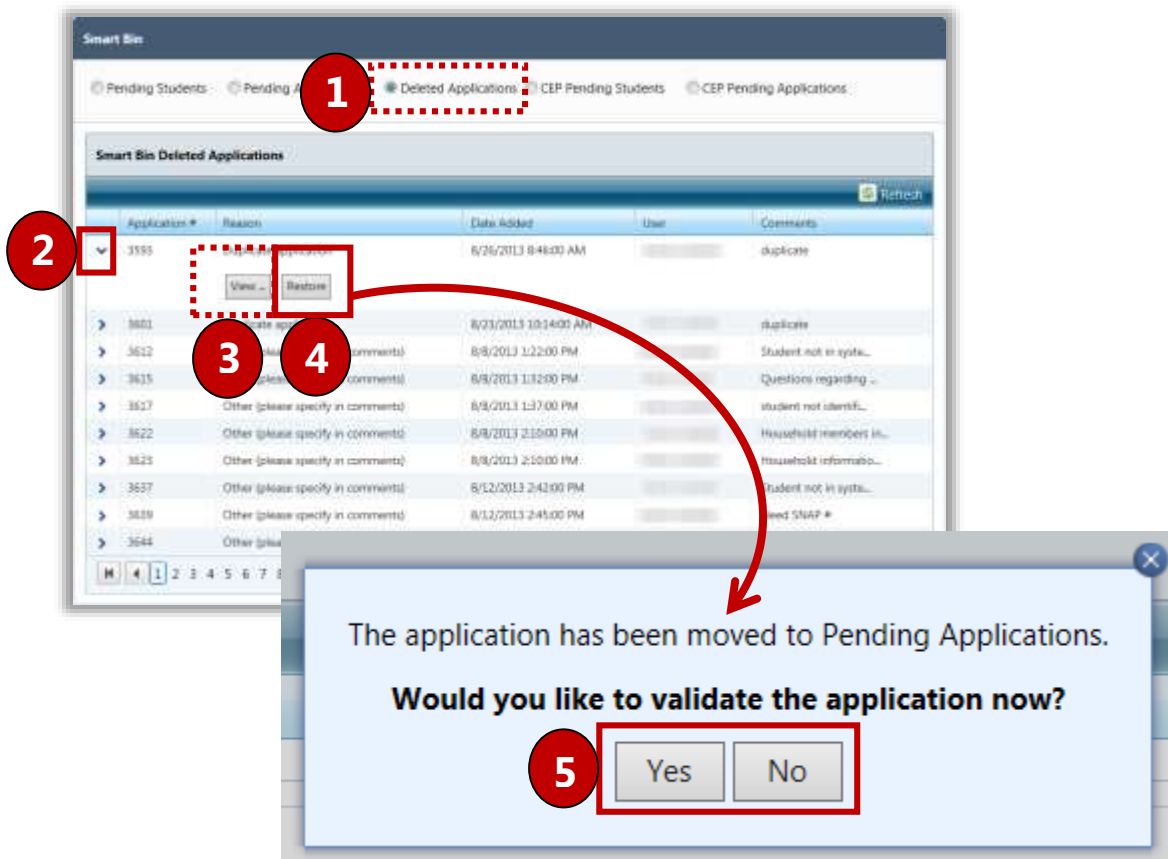
1. Make changes as needed to the application. See pages 34—47 for information on the validation process.
2. Click  to save changes and process eligibility of the application.

 **Note**
Don't forget to print the notification letter for this application.


Processing and Restoring Deleted Applications

To process and restore deleted applications


1. Select **Deleted Applications**.
2. Click **Expand** () to show options for working with the deleted application.
3. (Optional) Click to display the application in the **View Application** window.
4. Click to move the application to **Pending Applications** in Smart Bin.
5. Click to open the application in the Validation Workspace to begin the validation process, or
Click to display the **Smart Bin** page.





Processing Pending CEP Students

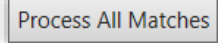
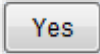
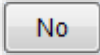
Students who are enrolled at CEP-eligible sites but are also included on an application are sent to the Smart Bin as Pending. If the student transfers to a non-CEP site, the **Caution** () icon displays in the **Matched** column to alert the user that the student can now be processed on the application.

To process pending CEP students

1. Select **CEP Pending Students**.
2. In a student listing, click **Edit** ()
The **Smart Bin** page expands.
3. Make changes as needed and click **Update** to save changes.

Click  in the student listing to search and confirm a match using the process described in Validate (see pages 34—47).

A green check mark () is displayed 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.

4. Click  to update the Validation Workspace and assign the eligibility determination to this student.
5. Click  to print the letter(s) now, or
Click  to print the letter(s) at a later date.

1 CEP Pending Students

2 [Edit Icon]

3 Update


4 Process All Matches


5 Do you want to print notifications for the matching students? No Yes


Student ID	Last Name	First Name	Site Code	Grade	Birth Date	Application	Application Status	Matched	Look Up
		Jon		4	6/27/2006	1409	Partially Validated	⚠	[Edit]
		Peter		PK	12/21/2011	1406	Partially Validated		[Edit]
		Brenda		4	5/15/2003	1470	Partially Validated		[Edit]


Viewing CEP Application Information and Processing Pending CEP Applications

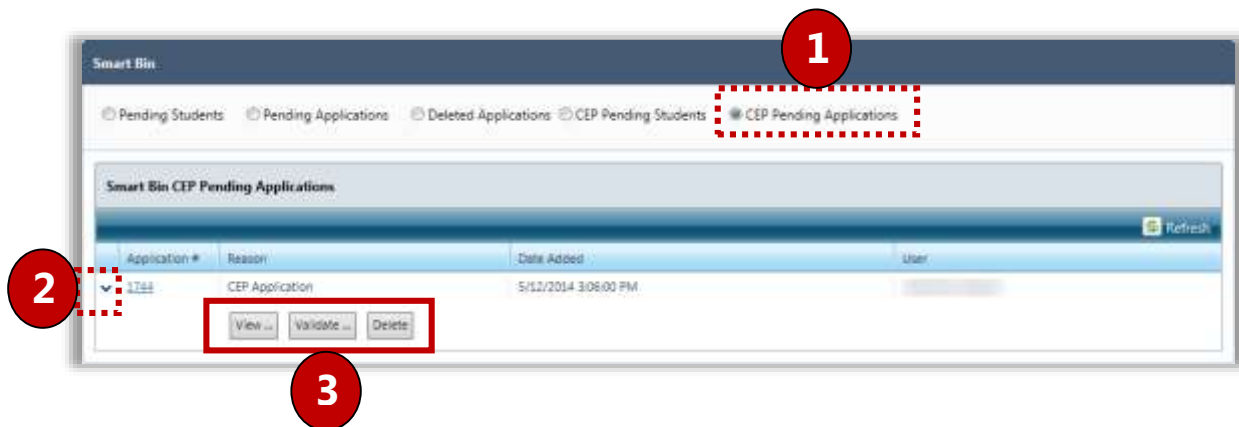
To view CEP application information and process pending CEP applications

1. Select **CEP Pending Applications**.
2. Click **Expand** () to show options for working with the pending application.
3. Perform one or more of the following actions:

Click  to display the application in the **View Application** window.

Click  to open the application in the Validation Workspace to complete the validation process.

Click  to delete the application.




Validating an Application

Clicking  displays the application in the Validation Workspace.

In the Validation Workspace:

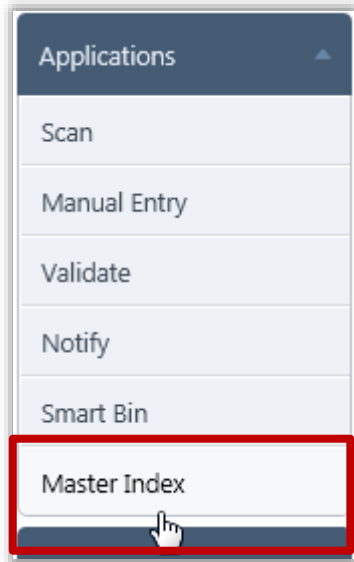
1. Make changes as needed to the application. See pages 34—47 for information on the validation process.

2. Click  to save changes and process eligibility of the application.

Note

Don't forget to print the notification letter for this application.

Master Index



Master Index holds all processed applications. It is an electronic paper filing cabinet that can be searched by:

- Application
- Student

Twelve different search criteria can be used to narrow the search for an application.

By default on the **Master Index** page:

- **Academic Year** is set to the current school year
- **Site Code**, **Site**, and **Grade** are set to “ALL”.
- **Application Status**, **Eligibility**, **Entry Method**, and **Language** are set to “ALL”.
- **Search By** is set to “Application”.
- All remaining fields are blank.

Master Index Page

The screenshot shows the 'Master Index' search interface. It includes dropdown menus for 'Academic Year' (2012 - 2013), 'Site Code' (-- ALL --), 'Site' (-- ALL --), and 'Grade' (-- ALL --). There are radio buttons for 'Search By' (Application selected, Student unselected). Below are input fields for 'Batch #', 'Application #', 'Application Status' (-- ALL --), 'Eligibility' (-- ALL --), 'Entry Method' (-- ALL --), 'Guardian SSN', 'Guardian Name', and 'Language' (-- ALL --). 'Apply' and 'Reset' buttons are at the bottom left. A table header 'Applications' is visible at the bottom.

Page Functions

Button	Description
	Click to refresh the page to display all batches that meet the selected criteria.
	Click to return all search criteria to the default settings.
	Click to export the Applications list to a spreadsheet.

To display an application by application

1. Select search criteria and click **Apply** .
2. Click the [Application #](#) link to display the application.

The screenshot shows the 'Master Index' search interface. A red dashed box highlights the search criteria section, which includes:

- Academic Year: 2012 - 2013
- Site Code: [Redacted]
- Site: ELEMENTARY SCHOOL
- Grade: 5
- Search By: Application, Student
- Batch #: [Empty]
- Application #: [Empty]
- Application Status: -- ALL --
- Eligibility: Free
- Entry Method: Online
- Guardian SSN: [Empty]
- Guardian Name: [Empty]
- Language: -- ALL --

 Below the search criteria, the 'Apply' button is highlighted with a red solid box, and a mouse cursor is pointing at it. The 'reset' button is also visible. At the bottom, there is a section labeled 'Applications'.

To display an application by student

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

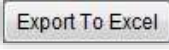



The screenshot shows the 'Master Index' search interface. A red dashed box highlights the search criteria section, which includes:

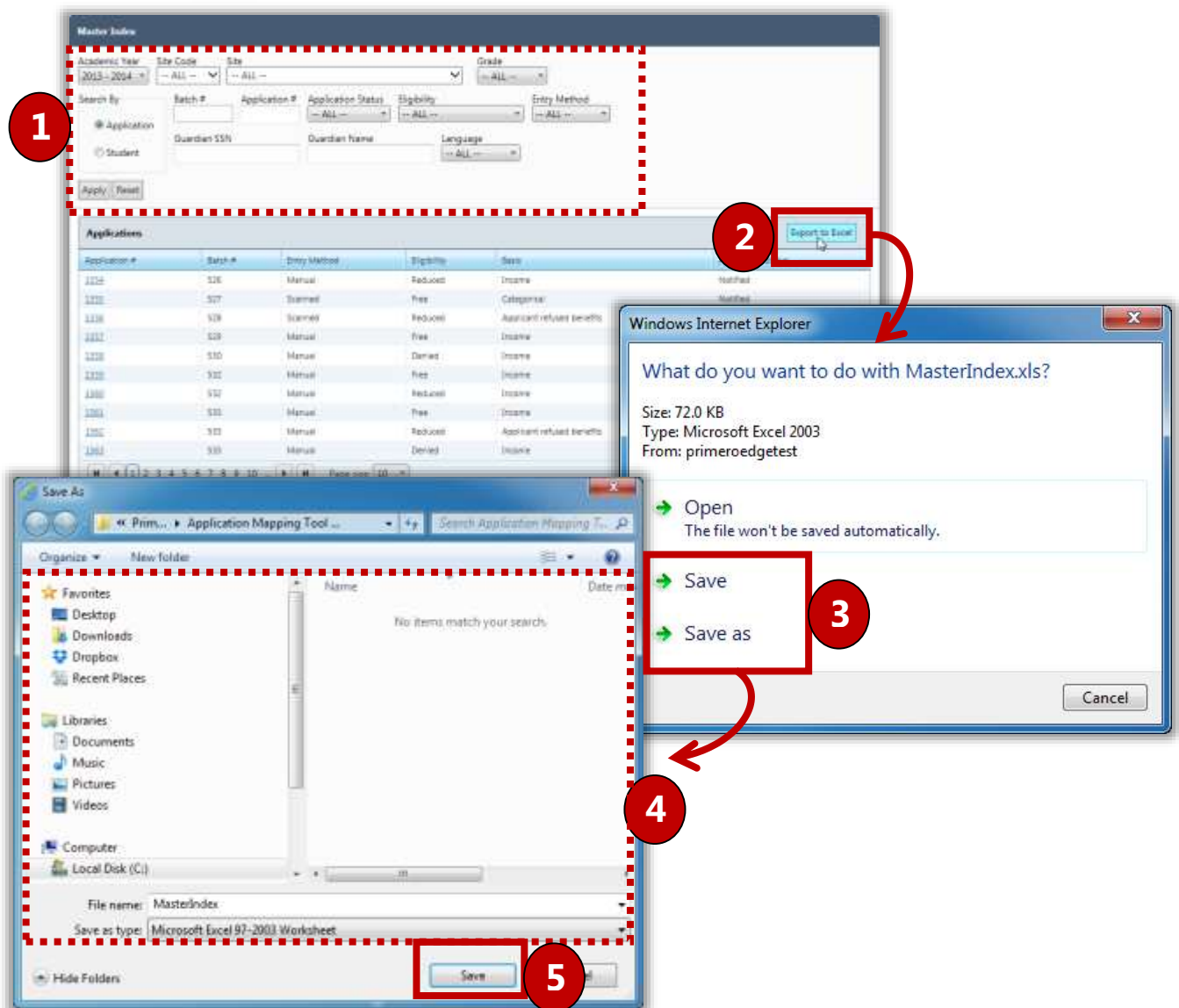
- Academic Year: 2012 - 2013
- Site Code: -- ALL --
- Site: -- ALL --
- Grade: -- ALL --
- Search By: Application, Student
- Student ID: 960034392
- Eligibility: -- ALL --

 Below the search criteria, the 'Apply' button is highlighted with a red solid box, and a mouse cursor is pointing at it. The 'reset' button is also visible. At the bottom, there is a section labeled 'Applications'.

Exporting the Master Index Applications List

To export the Master Index Applications list

1. Select or enter search conditions to display a list of applications.
2. Click  .
3. Click  to save the file with the default name at the default location, or
Click  to save the file with a custom name and to a selected location.
4. Use standard Windows navigation techniques to select a save location for the file. Either accept the default file name of “MasterIndex” or enter a new name.
5. Click  .



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.

- Click **Validate** to open and reprocess the application in the Validation Workspace.
- Click **Notification ...** to view, print, and email the Notification of Approval letter.
- Click **Add For Verification** to include 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 the Compliance section in this user manual.

The screenshot shows a web application window titled 'PrimoEdge - View Application - Window Internet Explorer'. The main content area is titled 'Application #: 1393 (0 of 1)' and 'Batch #: 403'. There are two buttons at the top: 'Validate' and 'Notification ...'. Below these are several tabs: 'Application Info', 'Optional Info', 'Guardian Info', 'History', 'Refuse Benefits', 'Image/Documents', 'Verification Info', and 'Verification Response'. The 'Application Info' tab is active and contains the following fields:

- Application #: 1393
- Entry Method: Manual
- Date Received: 7/21/2012
- Language: English
- Household Size: 0
- Total Income (): \$0.00
- Application SSN: [Empty]
- No SSN
- Application is signed
- Case #: 1234567890
- Case Type: SNAP
- Benefits Recipient: [Empty]

Below the application info are two tables:

Students

Student ID	Name	Site	Grade	Foster Student	Birth Date
00002192	00000 ABIGAIL P	000	11	<input type="checkbox"/>	10/1/1994
00006472	00000 ABBY R	000	02	<input type="checkbox"/>	6/10/2003

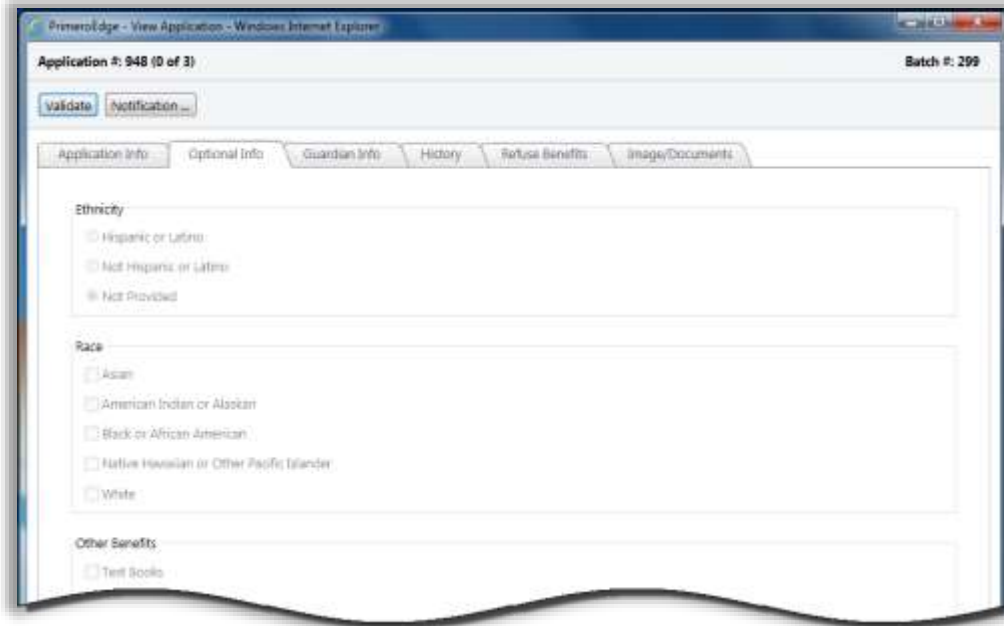
Household Members

Name	Job	Alimony	Retirement	Other	No Income
00000 ABIGAIL P	--	--	--	--	<input checked="" type="checkbox"/>
00000 ABBY R	--	--	--	--	<input checked="" type="checkbox"/>

The number of tabs shown for an application is dependent on the application status. In this example, the application status is “Verified” and two tabs of verification information are available: **Verification Info** and **Verification Response**. If the application status is “Processed”, the last two tabs are not shown as seen in the example on the next page.

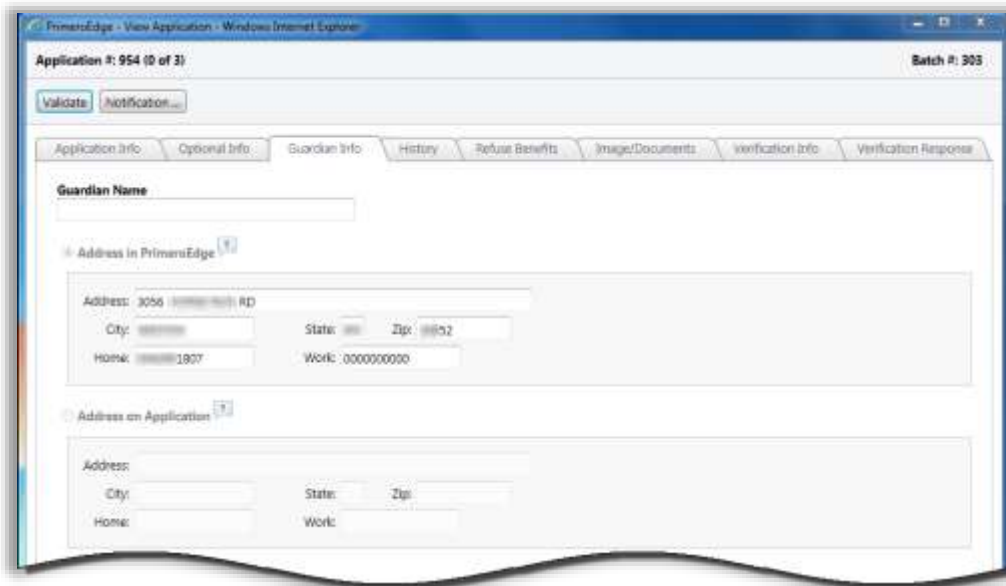
Tab 2: Optional Info

The **Optional Info** tab displays Ethnicity, Race and Other Benefits information collected from applications, if provided. See page 214 for an example of Other Benefits in Online Applications.



Tab 3: Guardian Info

The **Guardian Info** tab contains all information displayed in the **Guardian Information** popup accessed from the Validation Workspace. Information cannot be changed directly in this tab view—to make changes you must re-validate the application.

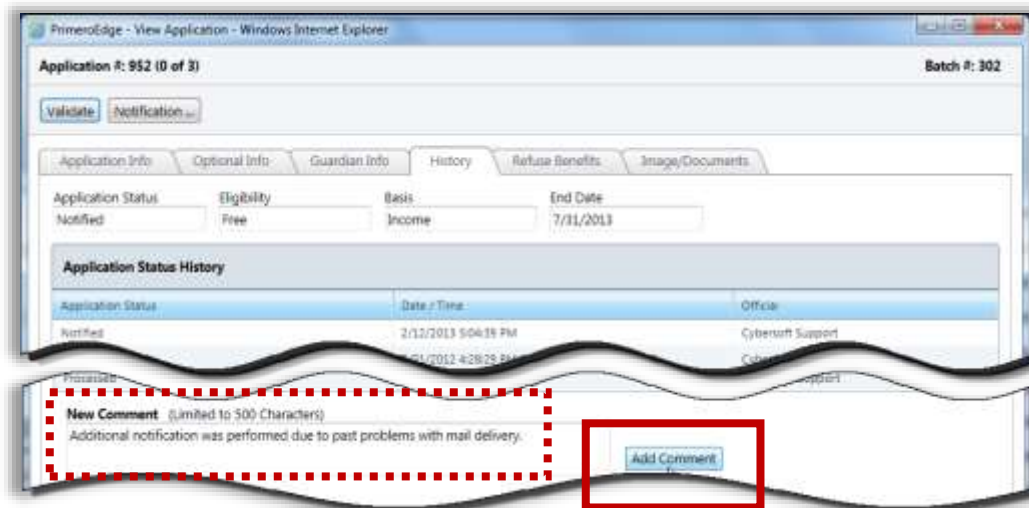


Tab 4: History

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.

To add comments

- Enter text in **New Comment** and click **Add Comment** .

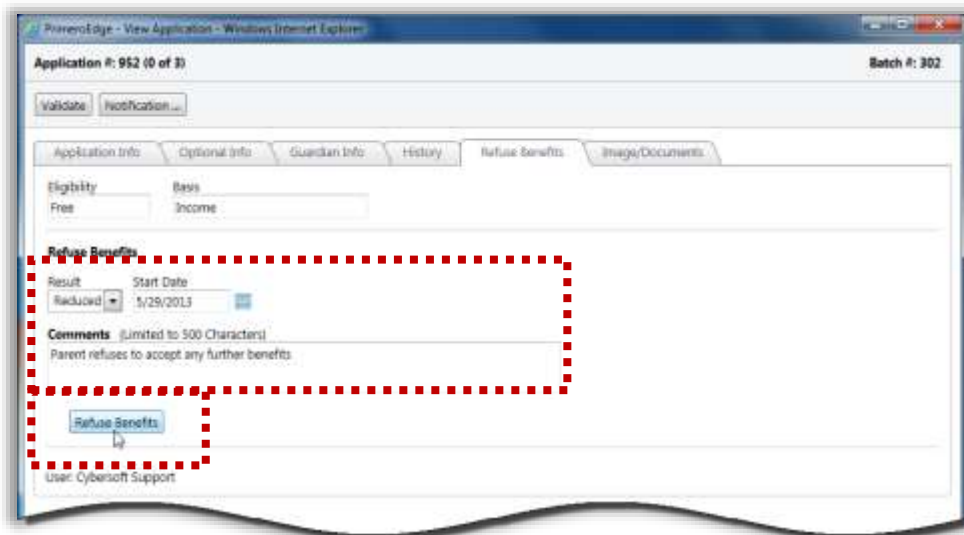


Tab 5: Refuse Benefits

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

To record refusal of benefits


1. Enter or select a **Start Date**, enter text in **Comments** to document the refusal and click **Refuse Benefits** .
2. Click **OK** to confirm the refusal.




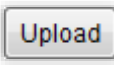
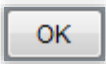
Tab 6: Image/Documents

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  .

To upload a document

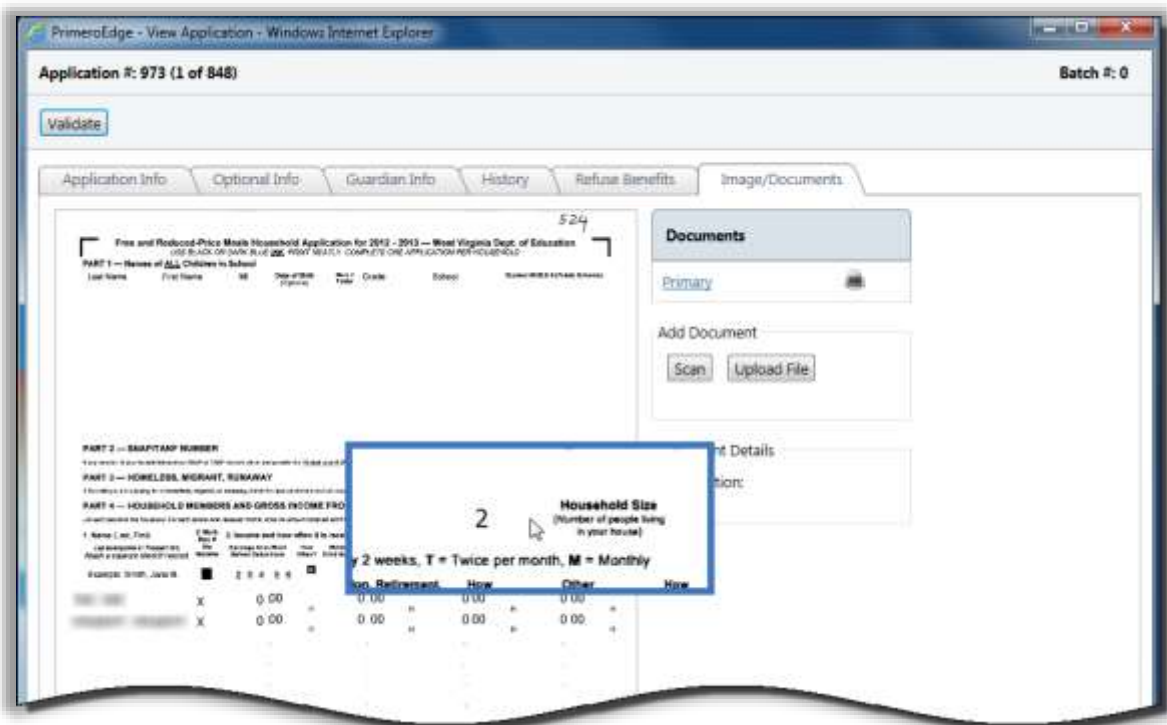
1. Click  .
2. Select a file and click  .
3. Enter a name for the uploaded file in **Description** and click  .

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.



Tab 7: Verification Info

The **Verification Info** tab appears when the application has been included in the verification process. This tab provides read-only details of that process.

The screenshot shows the 'Verification Info' tab in a web browser window titled 'PrimerEdge - View Application - Windows Internet Explorer'. The page displays application details for 'Application #: 954 (0 of 3)' and 'Batch #: 303'. At the top, there are 'Validate' and 'Notification...' buttons. Below are several tabs: 'Application Info', 'Optional Info', 'Guardian Info', 'History', 'Refuse Benefits', 'Image/Documents', 'Verification Info', and 'Verification Response'. The 'Verification Info' tab is active, showing a form with the following fields:

Application Number:	954
Area Name:	Area 1
Eligibility:	Reduced
Basic:	Income
1st Notice Date:	1/4/2013
Follow Up Notice Date:	1/8/2013
Response Due Date:	1/10/2013
User:	cybersoft\support

Tab 8: Verification Response

The **Verification Response** tab also appears when the application has been included in the verification process and provides two tabs. **Verification Result Summary** is shown first when the verification process is complete and provides summary of the verification results.

To view a Verification Completion Notice

- Click .

To print a Verification Completion Notice

1. Click .
2. Click in the Windows print popup.

The screenshot shows the 'Verification Response' tab in the same web browser window. The 'Verification Result Summary' sub-tab is active, displaying the following information:

Verification Result:	Reduced to Paid
Reason for Change:	Change in SNAP/TANF
Change Date:	1/15/2013
Official:	cybersoft\support
Completion Date:	1/10/2013 5:23 PM
Completion Notice Date:	


At the bottom of the summary, there are two buttons: 'View ...' and 'Print Completion Notice'. Both buttons are highlighted with a red rectangular box.

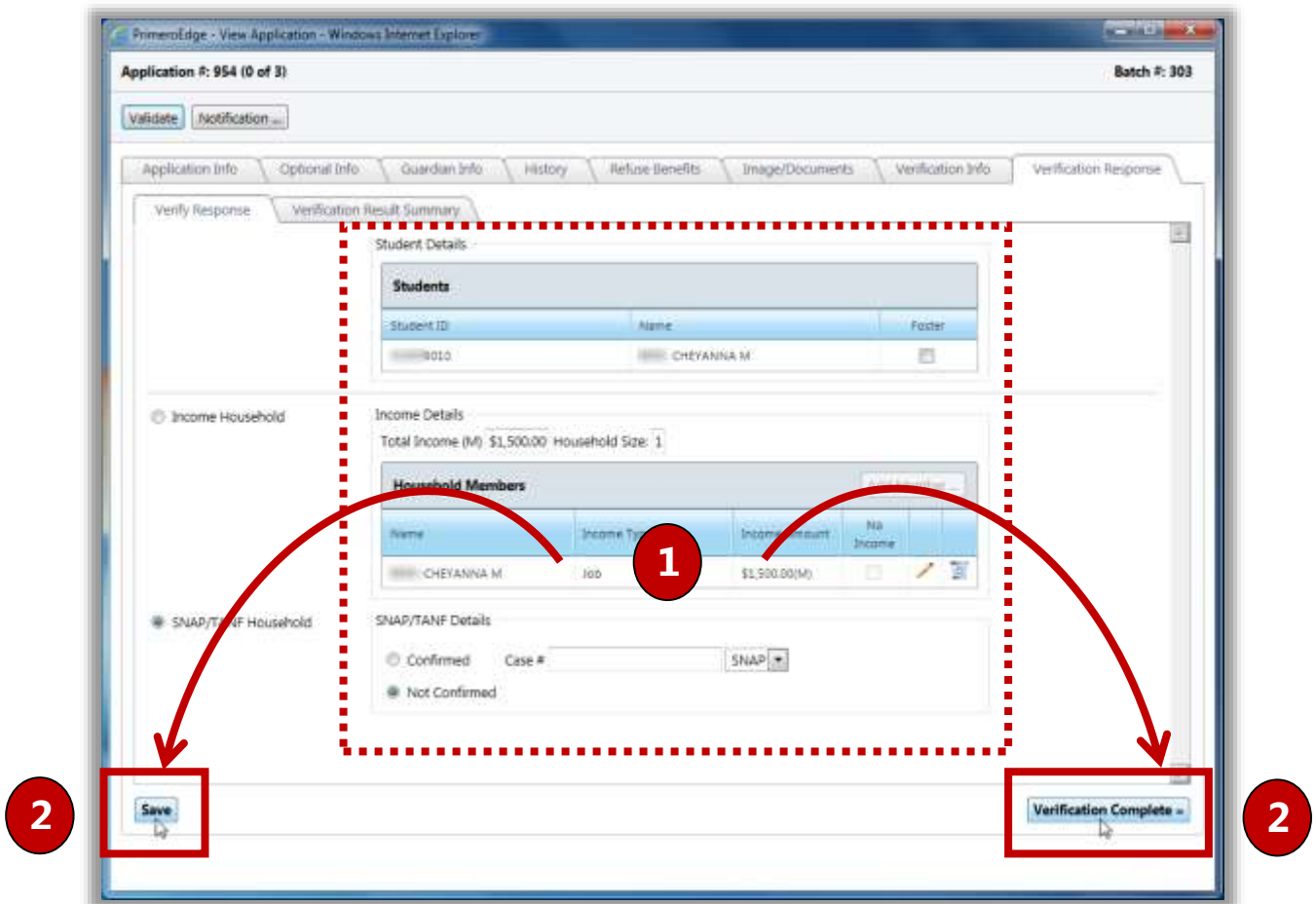
The **Verify Response** sub-tab allows for entry of student and income details when a response has been received from a parent or guardian regarding the application.

To save verification information without marking the application verification as complete

1. Enter new information.
2. Click  .

To save verification information and mark the application verification as complete

1. Enter new information.
2. Click  .



3

Administration

In this section, you will learn how to:

- ✓ Document eligibility for **Direct Approvals**.
- ✓ Extend benefits for **Sibling Direct Approvals**.
- ✓ Set and manage the **Grace Period**.
- ✓ Remind parents to reapply for benefits via **Grace Period Letters**.
- ✓ Generate **Household Letters**.
- ✓ View and update **Letter Templates**.
- ✓ View and update **Temporary Approvals**.
- ✓ Review of **Grace Period Letters** page elements.
- ✓ Steps to view a Grace Period letter as it would be printed.
- ✓ Steps to print one, selected or all Grace Period letters for all sites or a selected site.
- ✓ Review of **Household Letters** page elements.
- ✓ Steps to view a Household Letter as it would be printed.
- ✓ Steps to print one, selected or all Household Letters for all sites or a selected site.

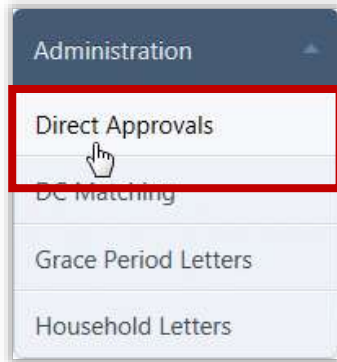
Administration at a Glance

Menu Function	Description
Direct Approvals	Upload a list of student names for direct approval certification or view lists of students approved through direct certification; manually enter names for certification; view and/or print individual notification letters
DC Matching	Certify students for meal service through match with sibling record
Grace Period Letters	View a list of patrons to receive Grace Period letters; view an individual Grace Period letter; print an individual or multiple Grace Period letter
Household Letters	View a list of patrons included in the list of households to receive notification of reapplication letters; view an individual Household Letter; print an individual or multiple Household Letters

 **Note:**

Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Administration** menu, you may see a subset of the functions listed above or you may not have access to all of the features for each menu selection.

Direct Approvals



Direct Approvals are eligibilities that do not come from applications 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.




By default, on the **Direct Approvals** page:

- “Approval” is selected in the **Search By** group.
- **Academic Year** is set to the current school year.
- **Approval Type** is set to “SELECT”.
- **Approval ID**, **From**, and **To** are blank.

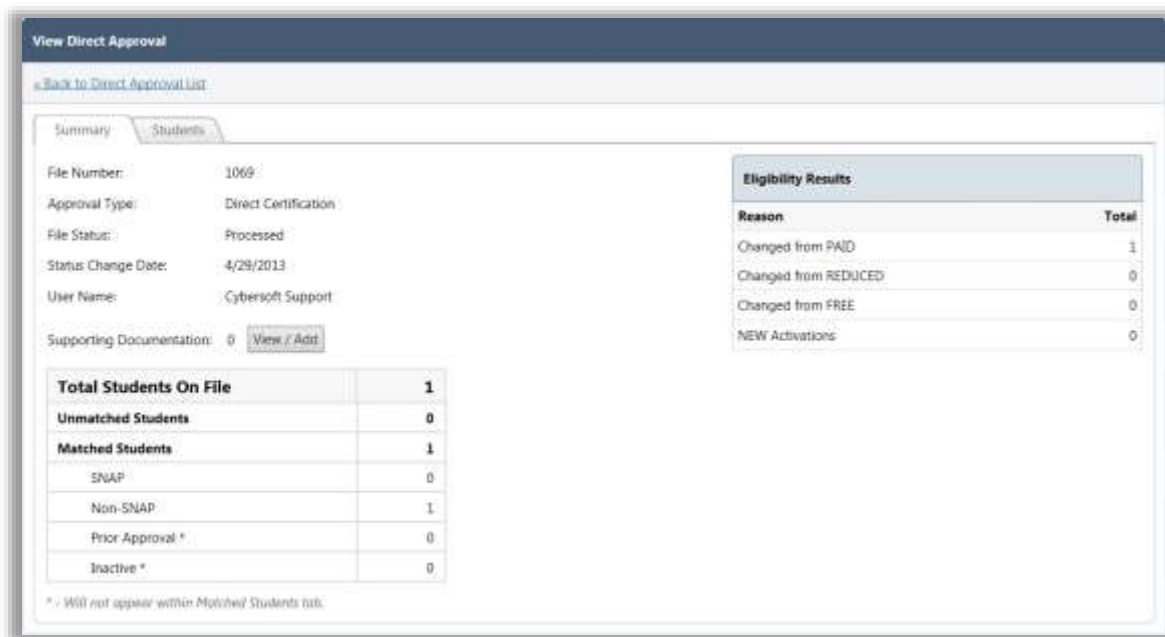
Direct Approvals Page

 A screenshot of the 'Direct Approvals' page in a web application. The page has a dark blue header with the title 'Direct Approvals'. Below the header, there are search filters: 'Search By' with radio buttons for 'Approval' (selected) and 'Student'; 'Academic Year' with a dropdown menu showing '2013 - 2014'; 'Approval Type' with a dropdown menu showing '-- SELECT --'; and three input fields for 'Approval ID', 'From', and 'To'. There are 'Apply' and 'Reset' buttons to the right of the input fields. At the bottom of the page, there is a 'Direct Approvals' section with a 'New ...' button.

Page Functions

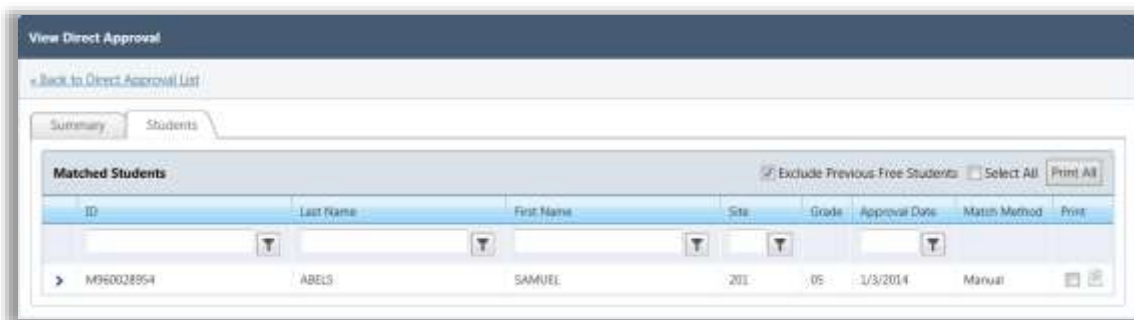
Button	Description
	Click to return all direct approvals that match the selected search conditions.
	Click to reset the fields to the default settings listed above.
	Click to either upload a new file or to manually enter a new direct approval.

Direct Approval Results



When a direct approval process is completed, the **View Direct Approval** page appears with two tabs of information.




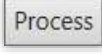
The first tab, **Summary**, provides details about the direct approval process.



The second tab, **Students**, lists all students who were included in the file upload or who were entered manually in the process selected on the **Direct Approvals** page.

Manually Entering a Direct Approval

To manually enter a direct approval

1. On the **Direct Approvals** page, click  .
2. In **Approval Type**, select an approval method and click  .
3. In the entry options, choose “Manual Entry”.
4. In **Student ID**, enter all students to be included for this approval type by either:
 - Entering a student identification number.
 - Clicking **Lookup** () to search for a student in the **Lookup** popup.
5. Click  .

**Tip**

Up to 25 students can be entered on one page.

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.

1 Direct Approvals

Search By: Approval Student

Academic Year: 2012 - 2013

Approval Type: --SELECT--

Approval ID: From [] To []

Apply Reset

Direct Approvals

2 New Direct Approval

Back to Direct Approval List

Approval Type: Direct Certification

Apply Reset

Cancel Process

3 New Direct Approval

Back to Direct Approval List

Approval Type: Direct Certification

Apply Reset

File Import Manual Entry

Students

Student ID	Last Name	First Name	Site	Grade	
[]	[]	KATELYN	[]	3	[]
[]	[]	DENNIS	[]	10	[]

Cancel Process

4 New Direct Approval

Back to Direct Approval List

Approval Type: Direct Certification

Apply Reset

File Import Manual Entry

Students

Student ID	Last Name	First Name	Site	Grade	
[]	[]	KATELYN	[]	3	[]
[]	[]	DENNIS	[]	10	[]

Cancel Process

5 View Direct Approval

Back to Direct Approval List

Summary **Students**

File Number: 1070

Approval Type: Direct Certification

File Status: Processed

Status Change Date: 5/7/2013

User Name: Cybersoft Support

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

Eligibility Results	
Reason	Total
Changed from PAD	1
Changed from REDUCED	1
Changed from FREE	0
NEW Activations	0

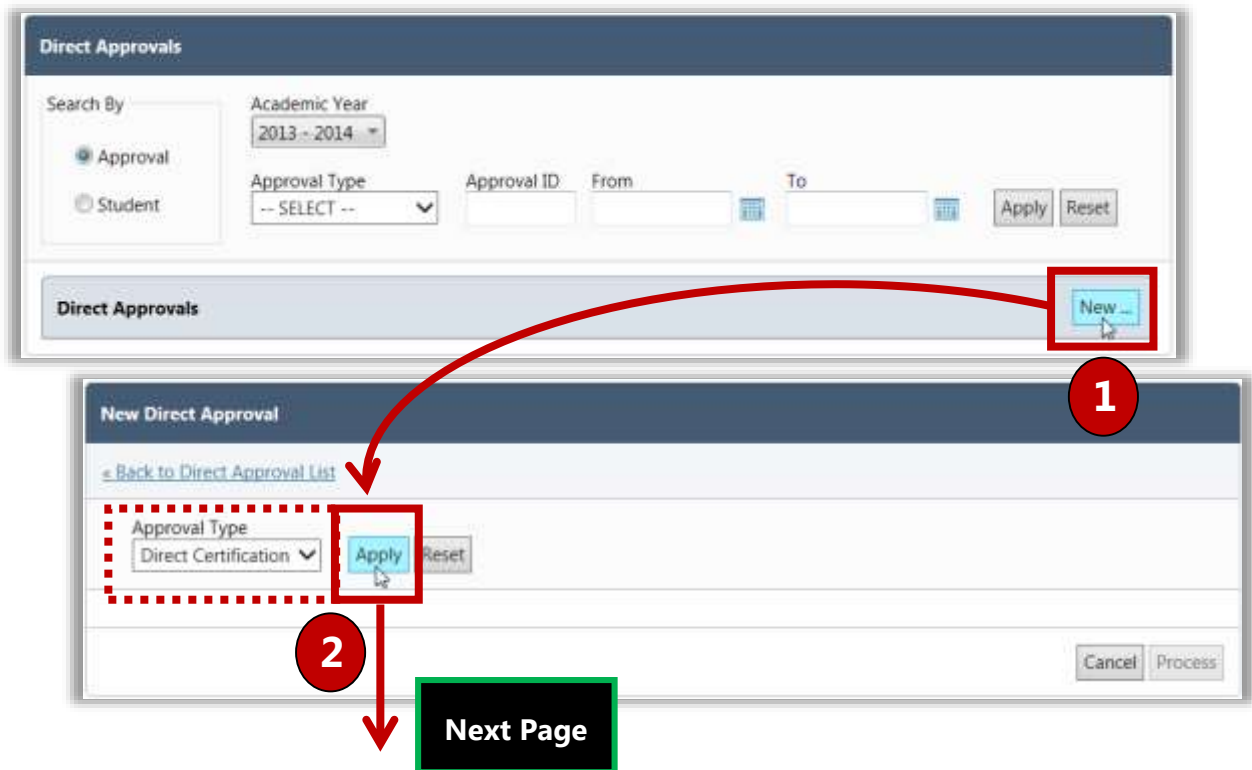
Total Students On File	
Total Students On File	2
Unmatched Students	0
Matched Students	2
SNAP	0
Non-SNAP	2
Prior Approval *	0
Inactive *	0

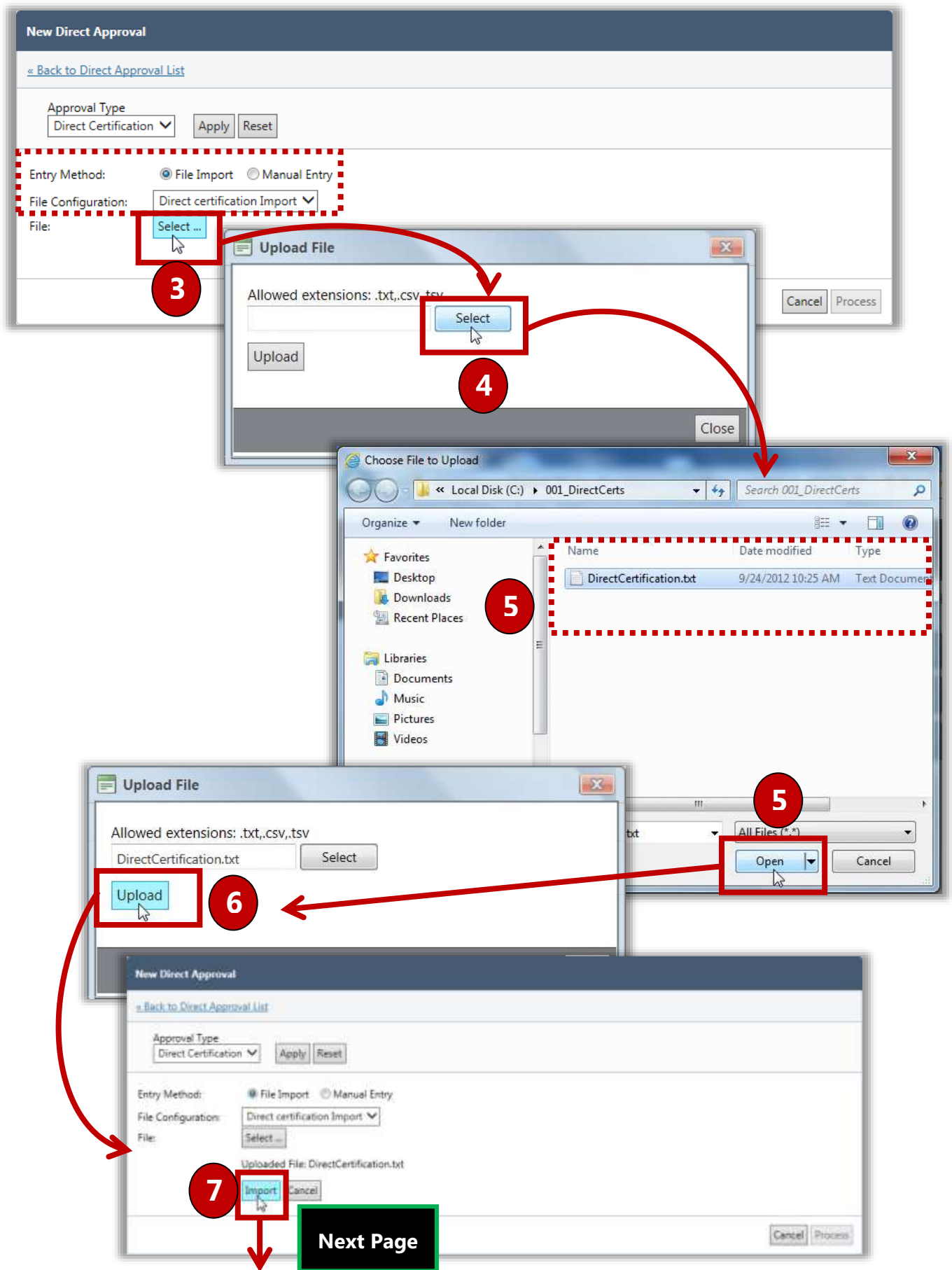
* - Will not appear within Matched Students tab

Importing a Direct Approval File

To import a direct approval file

1. Click **New ...** .
2. In **Approval Type**, select “Direct Certification” and click **Apply** .
3. Choose “File Import”, select the file configuration, and click **Select** .
4. Click **Select** to locate the file.
5. Use standard Windows navigation techniques to select a file and click **Open** .
6. Click **Upload** .
7. Click **Import** . As the file is imported, a progress bar displays the status of the import process. All student records in the import file are listed. At this point, you can choose to process the student listings in the imported file or you can wait to perform the processing at a later time.
8. Click **Process** . A second progress bar displays the status of the processing of student records. When the import processing is complete, the **Summary** tab of the **View Direct Approval** page appears.





New Direct Approval

[Back to Direct Approval List](#)

Approval Type: Direct Certification

Apply

File Import Manual Entry

Upload File

Uploaded File: DirectCertification.txt

Import Cancel

Import complete...Loading Preview...
Elapsed time: 00:00:01

New Direct Approval

[Back to Direct Approval List](#)

Approval Type: Direct Certification

Preview

Student ID / SSN	Last Name	First Name	Site Code	Grade Code
		MAKENNA		
		BRINLEIGH		
		DEVIN		
		BRIANNA		

Summary

Students on File: 4
Students Matching: 0

Cancel **8** Process

New Direct Approval

[Back to Direct Approval List](#)

Approval Type: Direct Certification

Elapsed time: 00:00:01

Preview

Student ID / SSN	Last Name	First Name	Site Code	Grade Code
		MAKENNA		
		BRINLEIGH		
		DEVIN		

Summary

Students on File: 4
Students Matching: 0

View Direct Approval

[Back to Direct Approval List](#)

Summary Matched Students Unmatched Students

File Number: 1196
Approval Type: Direct Certification
File Status: Processed
Status Change Date: 9/24/2012
User Name: Cybersoft Support

Eligibility Results


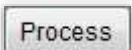
Reason	Total
Changed from REDUCED	0
Changed from PAID	0
Changed from FREE	0
NEW Activations	0

Total Students On File	4
Unmatched Students	0
Matched Students	4
SNAP	0
Non-SNAP	0
Prior Approval *	4
Inactive *	0

* - Will not appear within Matched Students tab

Processing an Imported File

To process an imported file

1. Select search conditions to display a list of approvals.
2. Click .
3. Click an [Approval ID](#) link.
4. Click .

The screenshots show the following steps:

- Step 1:** The 'Direct Approvals' search interface. The 'Search By' section has 'Approval' selected. The 'Academic Year' is set to '2013 - 2014'. The 'Approval Type' is 'Direct Certification'. A red dashed box highlights the search criteria, and a red circle with the number '1' is next to it.
- Step 2:** The 'Apply' button is clicked. A red box highlights the button, and a red circle with the number '2' is next to it.
- Step 3:** A list of approval IDs is displayed. The ID '1010' is selected. A red box highlights the ID, and a red circle with the number '3' is next to it.
- Step 4:** The 'View Direct Approval' screen is shown. The 'Process' button is clicked. A red box highlights the button, and a red circle with the number '4' is next to it.

The 'View Direct Approval' screen includes the following information:

File Number: 1182
Approval Type: Direct Certification
File Status: Processed
Status Change Date: 9/24/2012
User Name: Cybersoft Support

Total Students On File	
Total Students On File	4
Unmatched Students	0
Matched Students	4
SNAP	0
Non-SNAP	0
Prior Approval *	4
Inactive *	0


* - Will not appear within Matched Students tab.

Eligibility Results	
Reason	Total
Changed from REDUCED	0
Changed from PAID	0
Changed from FREE	0
NEW Activations	0

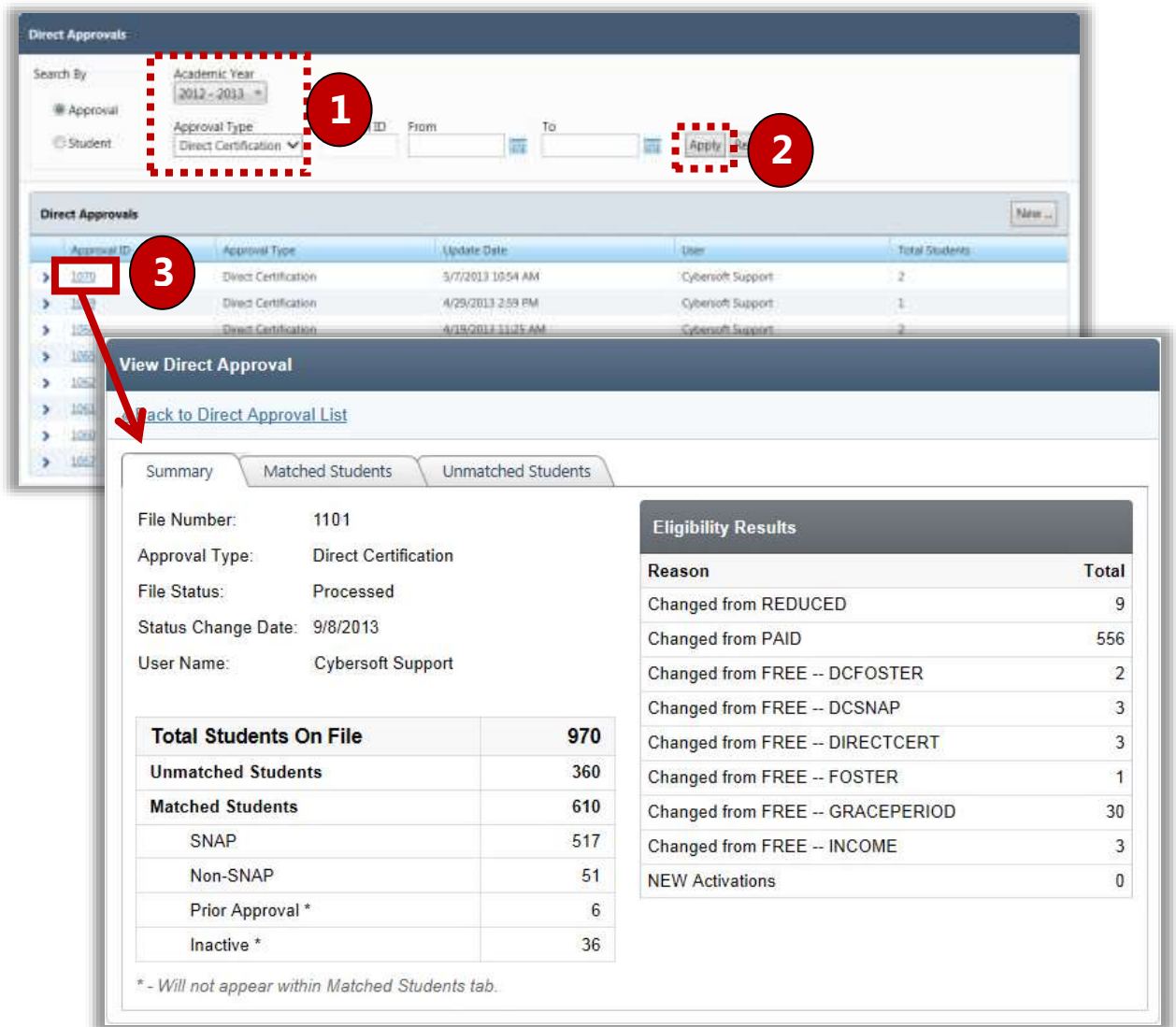
Summary Tab

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

To view a processed direct approval file

1. Select a year in **Academic Year** and select an approval type in **Approval Type**.
2. Click  .
3. In an approval listing, click the [Approval ID](#) link.

The **Summary** tab on the **View Direct Approval** page appears. Approval details are listed.



The screenshot shows the 'Direct Approvals' interface. At the top, there are search filters for 'Academic Year' (set to 2012-2013) and 'Approval Type' (set to Direct Certification). A red circle '1' highlights these filters. Below them is an 'Apply' button, highlighted with a red circle '2'. A table of 'Direct Approvals' is shown below, with the first row's 'Approval ID' (1010) highlighted by a red box and a red circle '3'. An arrow points from this box to the 'View Direct Approval' page. The 'View Direct Approval' page has a 'Summary' tab selected, showing details for File Number 1101, Approval Type Direct Certification, File Status Processed, Status Change Date 9/8/2013, and User Name Cybersoft Support. To the right is an 'Eligibility Results' table. Below the summary is a table of student counts.

Reason	Total
Changed from REDUCED	9
Changed from PAID	556
Changed from FREE -- DCFOSTER	2
Changed from FREE -- DCSNAP	3
Changed from FREE -- DIRECTCERT	3
Changed from FREE -- FOSTER	1
Changed from FREE -- GRACEPERIOD	30
Changed from FREE -- INCOME	3
NEW Activations	0

Total Students On File	970
Unmatched Students	360
Matched Students	610
SNAP	517
Non-SNAP	51
Prior Approval *	6
Inactive *	36



* - Will not appear within Matched Students tab.

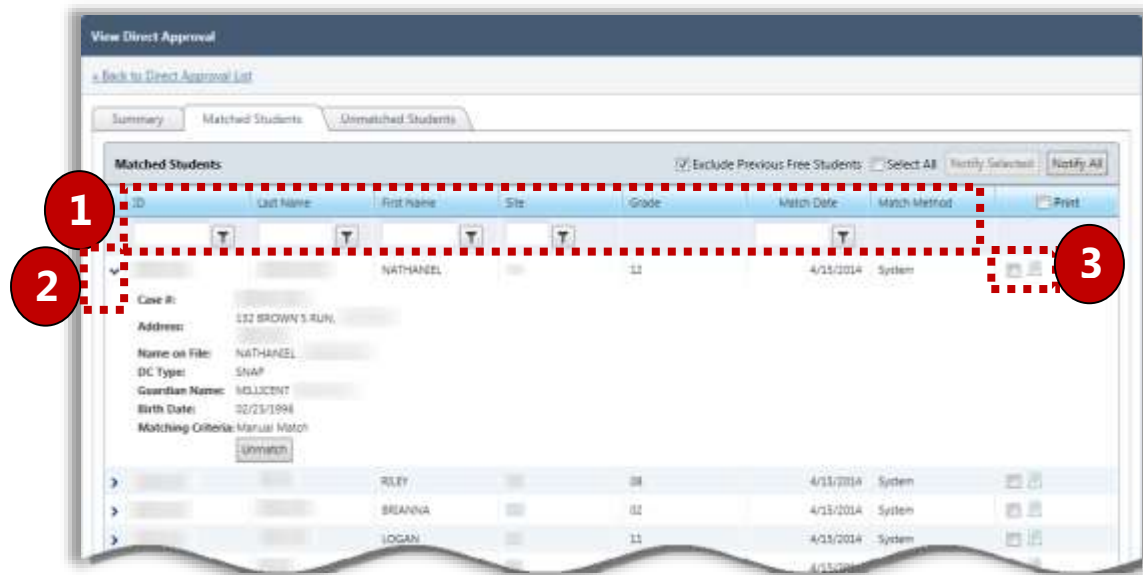
Matched Students Tab

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

To print a notification letter

In the Matched Students list:

1. Use one or more filters to search for students.
2. Click **Expand** (>) in a student listing to display additional information from the imported file when available.
3. Select one or more listings in **Print** () to print a notification letter.
- or -
Select **View** () to display the notification letter in the print viewer window.



Unmatched Students Tab

The **Unmatched Students** tab displays a list of all students in the import file that did not match a student in PrimeroEdge along with those students that have been manually “unmatched” on the **Previously Matched** tab through DC Matching. Students display based on SFA and county code.

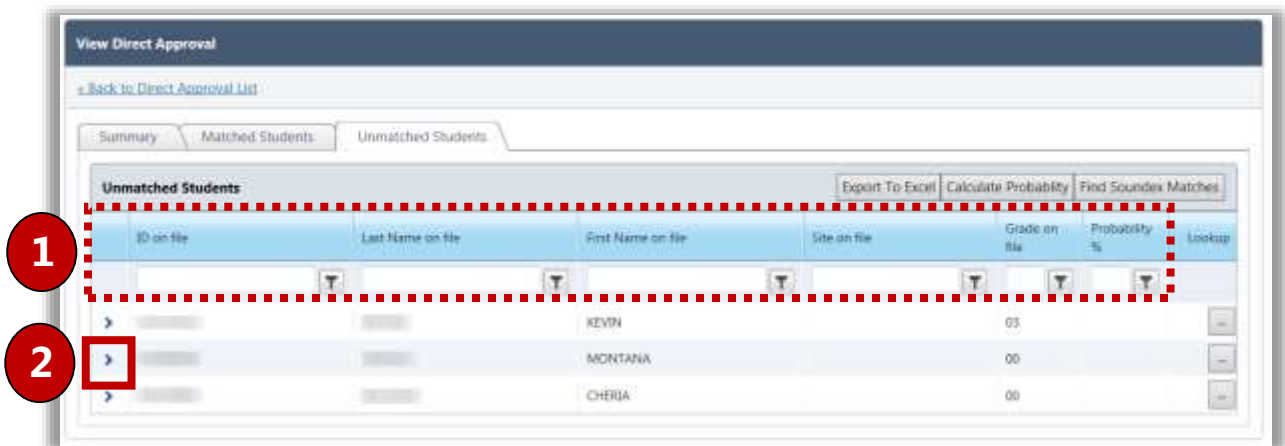
Possible reasons for unmatched students:

- Typo in the import file
- Not enrolled
- Missing SSN in PrimeroEdge

To view unmatched students

In the **Unmatched Students** list:

1. Use one or more filters to search for students.
2. Click **Expand** (>) in a student listing to display additional information, if any, from the import file.



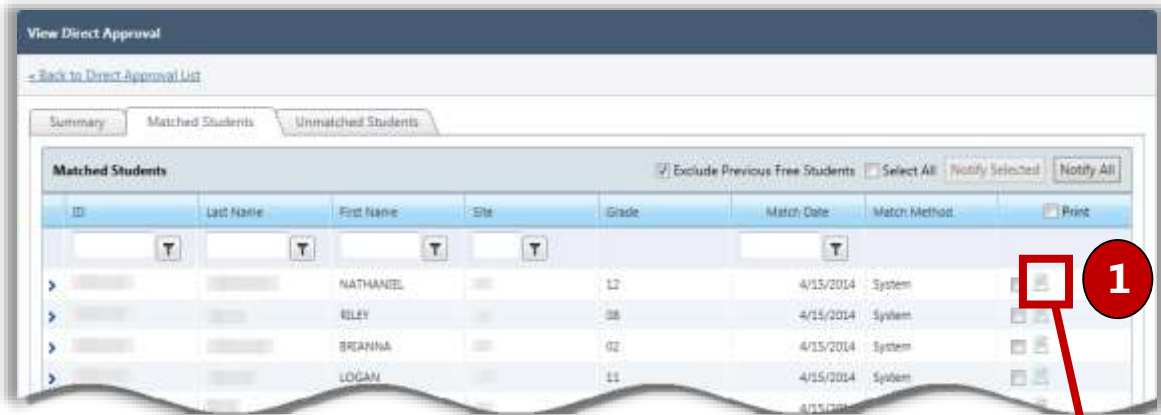
Sending an Individual Notification Letter

On the **View Direct Approval** page on the **Students** or **Matched Students** tab:

1. Click **View** (📄).

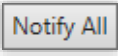
The letter displays in the **Letter Viewer** window

2. Click **Print** to print the letter or click **Email...** to email the letter.



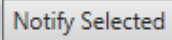
Printing Multiple Notification Letters

1. On the **Students** or **Matched Students** tab, do one of the following:

Select **Select All** to include all student listings and click .

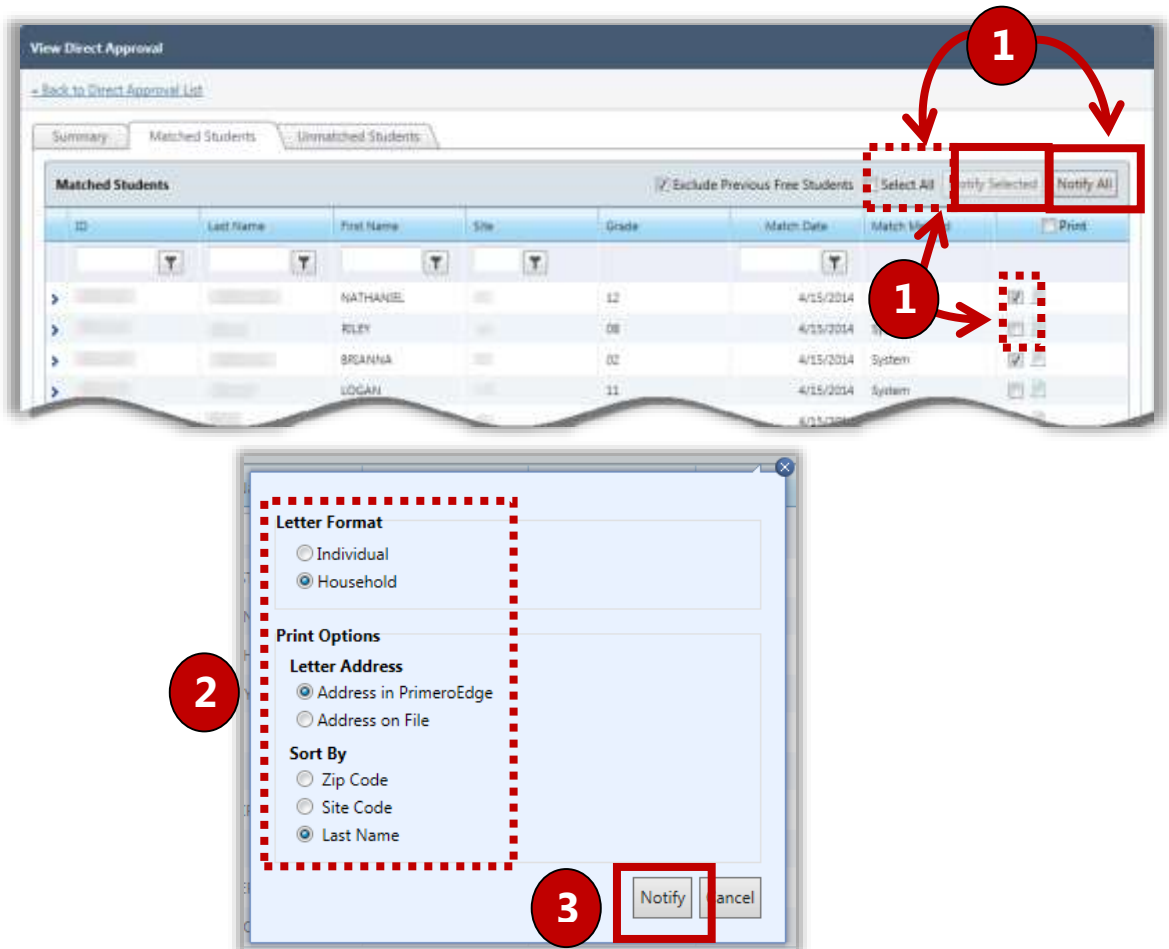
- or -

Select in the **Print** column in one or more individual student listings and click

.

2. Select the letter format, print options, and sort order.

3. Click .



The screenshot shows the 'View Direct Approval' interface with the 'Matched Students' tab selected. The table lists students with columns for ID, Last Name, First Name, Site, Grade, Match Date, Match Method, and Print. A red dashed box highlights the 'Select All', 'Notify Selected', and 'Notify All' buttons. A red circle with the number '1' and arrows points to these buttons. Below the table, a configuration dialog box is open, showing options for Letter Format (Individual, Household), Print Options (Letter Address: Address in PrimeroEdge, Address on File; Sort By: Zip Code, Site Code, Last Name), and a 'Notify' button. A red dashed box highlights the configuration options, and a red circle with the number '2' points to it. A red circle with the number '3' points to the 'Notify' button.

ID	Last Name	First Name	Site	Grade	Match Date	Match Method	Print
>		NATHANIEL		12	4/15/2014		<input type="checkbox"/>
>		RILEY		08	4/15/2014		<input type="checkbox"/>
>		BREANNA		02	4/15/2014	System	<input checked="" type="checkbox"/>
>		LOGAN		11	4/15/2014	System	<input checked="" type="checkbox"/>

Letter Format

Individual
 Household

Print Options

Letter Address





Address in PrimeroEdge
 Address on File

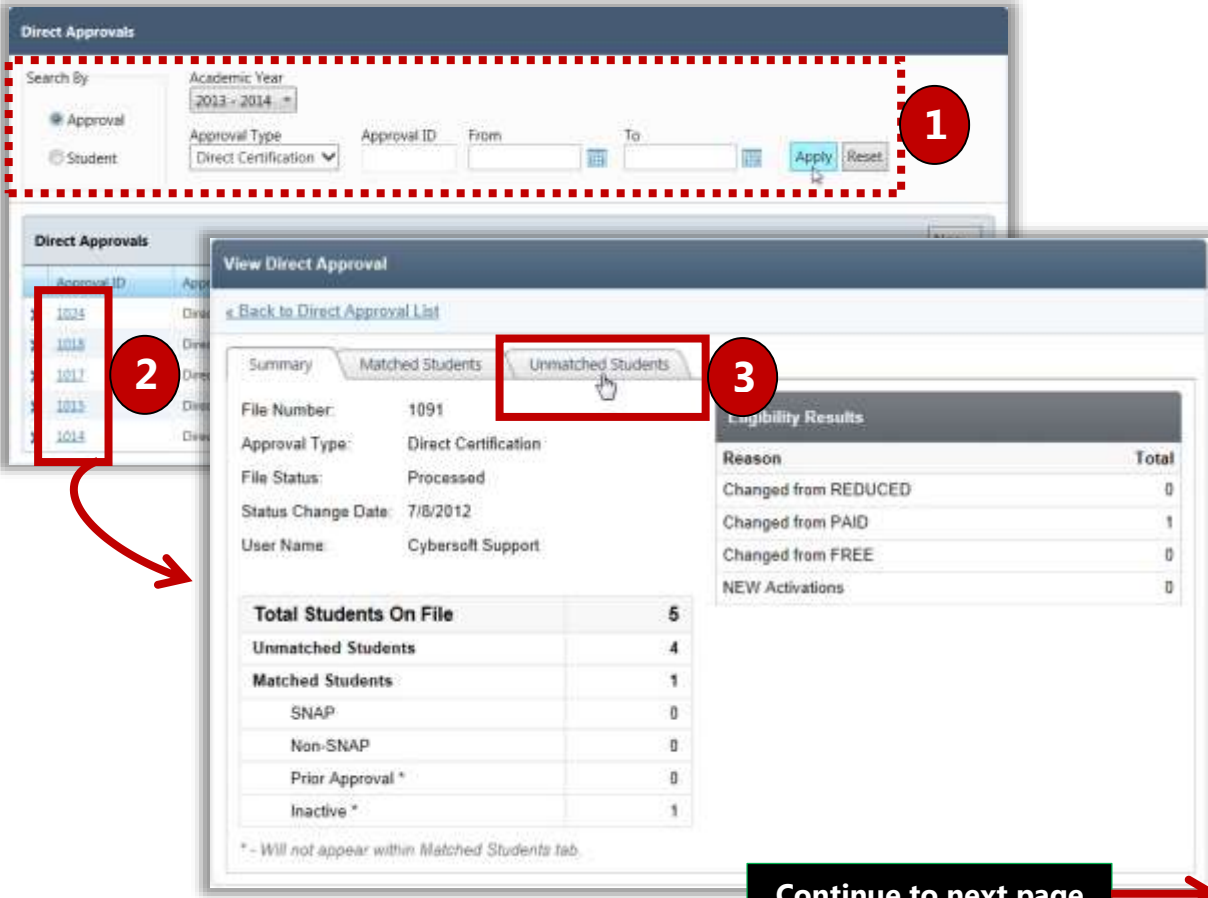
Sort By

Zip Code
 Site Code
 Last Name

Exporting an Unmatched Students File

On the **Direct Approvals** page:

1. Select or enter search conditions to display a list of approvals.
2. Click an [Approval ID](#) link in the **Direct Approvals** list.
3. Click the Unmatched Students tab.
4. Click  .
5. Click  to save the file with the default name at the default location, or
Click  to save the file with a custom name and to a selected location.
6. Use standard Windows navigation techniques to select a save location for the file. Either accept the default file name of “DCUnMatchedList” or enter a new name.
7. Click  .



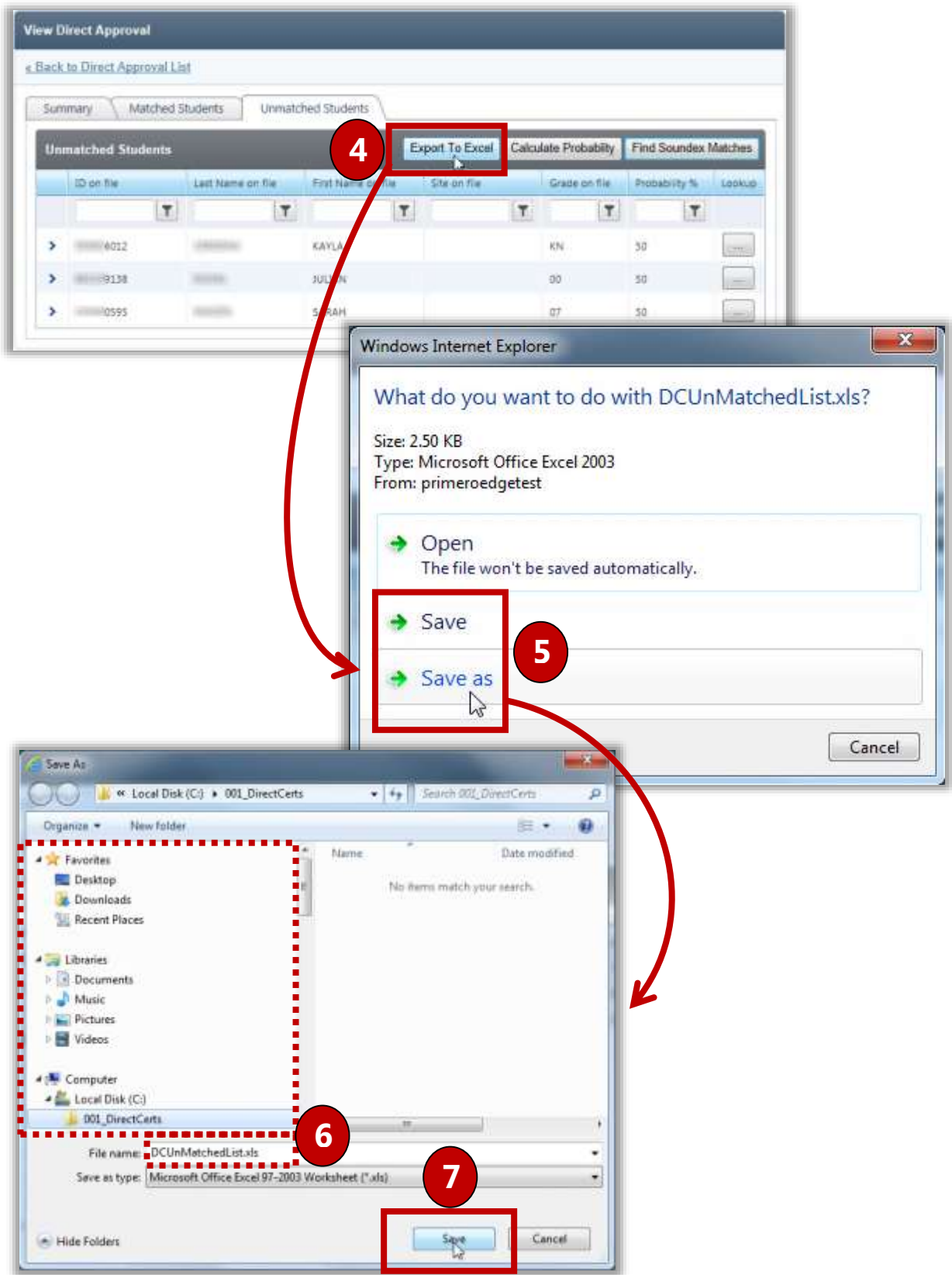
The screenshot illustrates the steps for exporting an unmatched students file. It shows the 'Direct Approvals' search interface with filters for 'Academic Year' (2013-2014) and 'Approval Type' (Direct Certification). A red dashed box highlights the search area, labeled with a red circle '1'. Below, a list of approval IDs is shown, with one ID (1014) highlighted in a red box and labeled with a red circle '2'. An arrow points from this ID to the 'View Direct Approval' window. In this window, the 'Unmatched Students' tab is selected, highlighted with a red box and labeled with a red circle '3'. The window displays details for file number 1091, approval type Direct Certification, and a summary table showing 5 total students on file, with 4 unmatched and 1 matched. A 'Legibility Results' table is also visible.

Reason	Total
Changed from REDUCED	0
Changed from PAID	1
Changed from FREE	0
NEW Activations	0

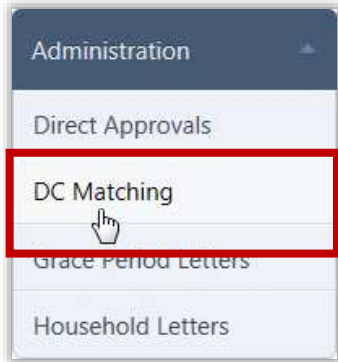
Total Students On File	
Unmatched Students	4
Matched Students	1
SNAP	0
Non-SNAP	0
Prior Approval *	0
Inactive *	1

* - Will not appear within Matched Students tab

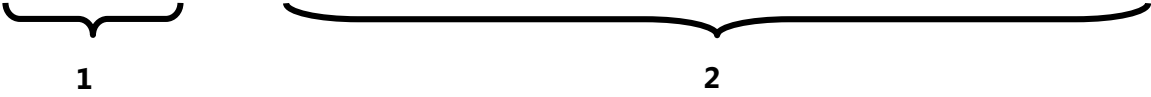
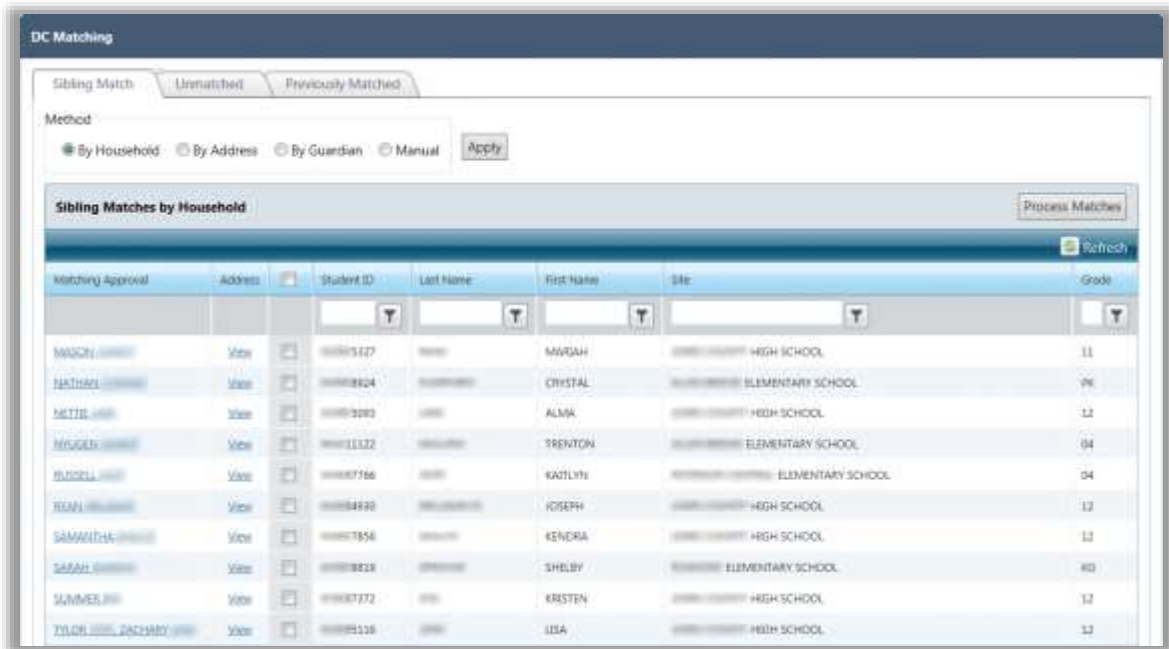
Continue to next page →



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.





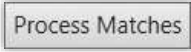
The students listed in the **Sibling Matches by Household** list are separated into two different groups:

- 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 (Mason) has been recognized as a possible sibling match with the first student in group 2 (Mariah).




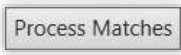
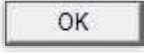
Matching by Household, Address, or Guardian

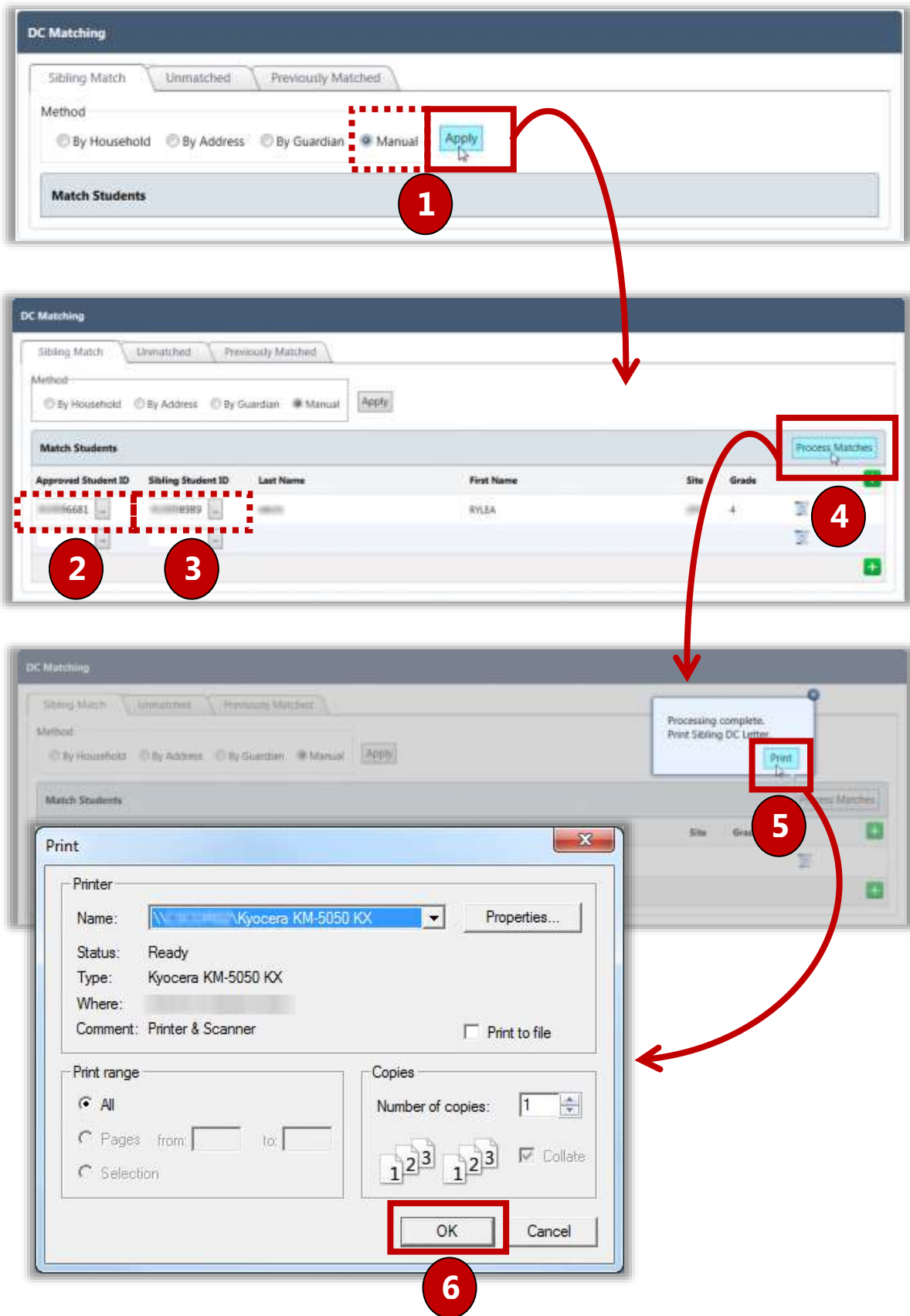
To match by household, address, or guardian

1. In the **Method** section, choose a match method:
 - **By Household** – select this option to match students who have the same household on file.
 - **By Address** – select this option to match students who have the same address on file. Select **Last Name Match Required** to only display students with the same last name.
 - **By Guardian** – select this option to match students who have the same guardian on file. Enter the guardian’s exact last name in **Last Name** and exact first name in **First Name**.
2. Click  .
3. Click the [View](#) link in the listing with students to be matched.
4. Compare the students’ addresses and click  .
5. If the two students in the listing are a match, select the between the two students.
6. Click  to assign the second student in the listing the same eligibility status as the first student in the listing.

Matching Manually

To manually match siblings


1. In the **Method** section, choose “Manual” and click  .
2. In **Approved Student ID**, click **Lookup** () to select a student.
3. In **Sibling Student ID**, click **Lookup** () to select a sibling student to be matched to the approved student.
4. Click  . When processing is complete, a **Print** prompt appears.
5. Click **Print**.
6. Click  .

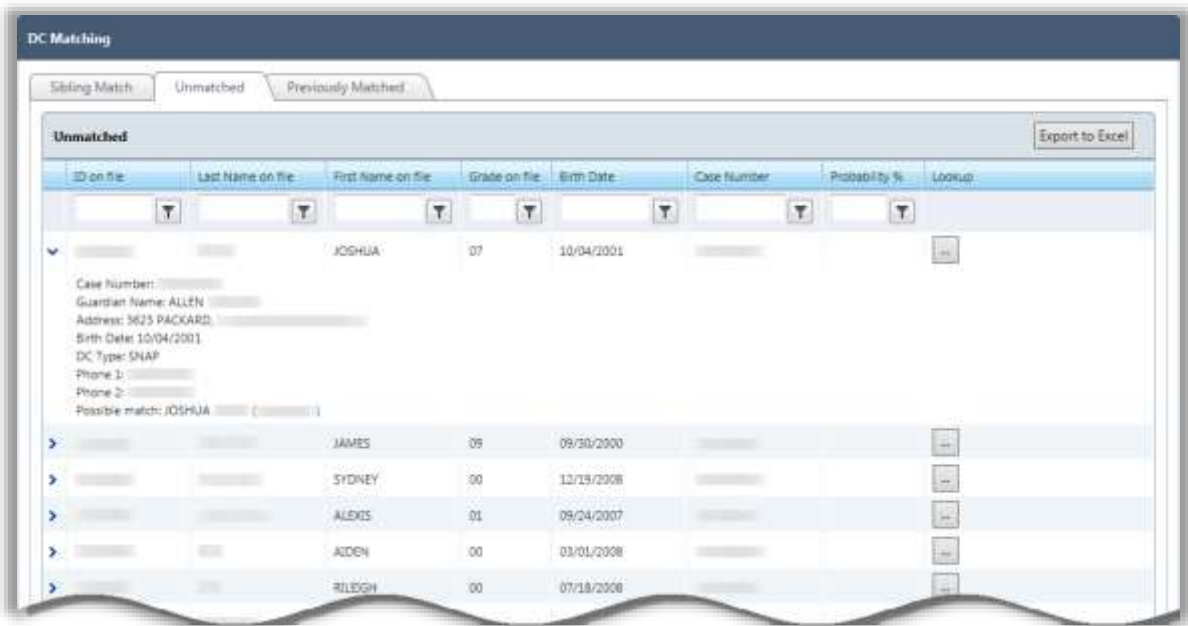


Viewing Unmatched Students







The **Unmatched Students** tab displays a list of all students in the import file that did not match a student in PrimeroEdge along with those students that have been manually “unmatched” on the **Previously Matched** tab through DC Matching.

To filter results

1. Enter search criteria in the column heading.
2. Click  .




The screenshot shows the 'DC Matching' interface with the 'Unmatched' tab selected. The table below lists unmatched students with their details and possible matches.

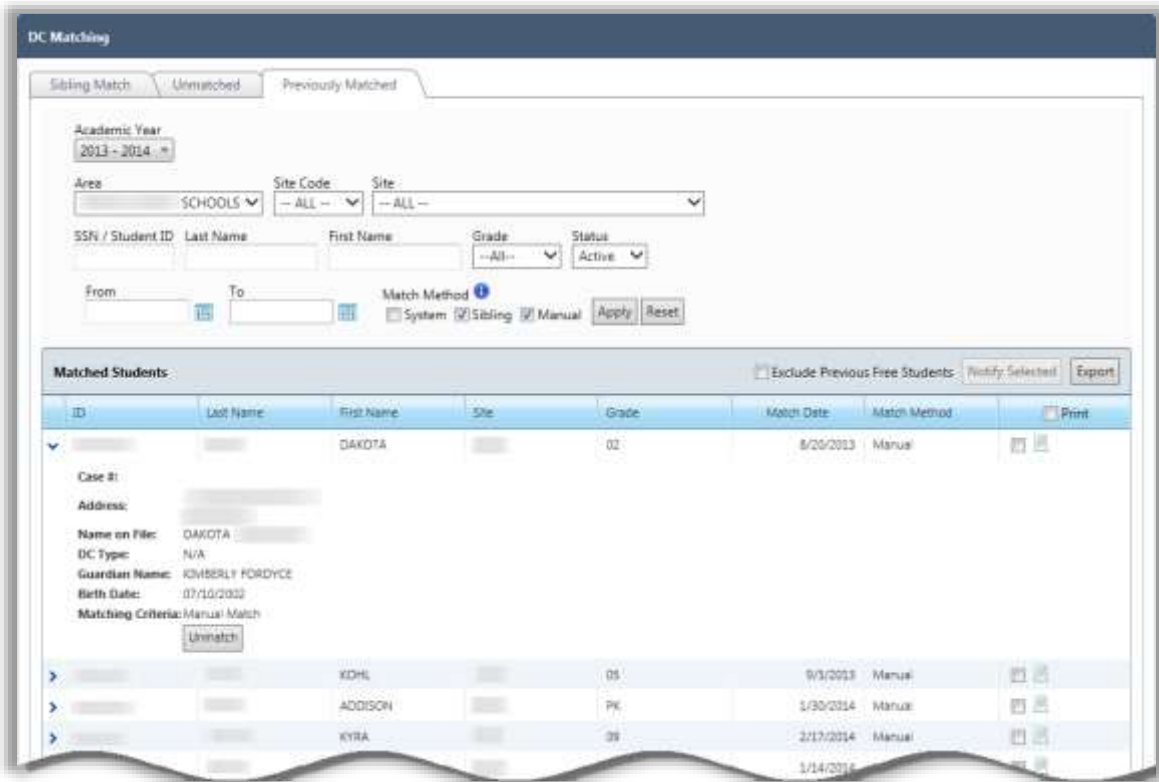
ID on file	Last Name on file	First Name on file	Grade on file	Birth Date	Case Number	Probability %	Lookup
		JOSHUA	07	10/04/2001			
Case Number: Guardian Name: ALLEN Address: 3625 PACKARD Birth Date: 10/04/2001 DC Type: SNAP Phone 1: Phone 2: Possible match: JOSHUA ()							
>		JAMES	09	09/30/2000			
>		SYDNEY	00	12/19/2008			
>		ALEXIS	01	09/24/2007			
>		AIDEN	00	03/01/2008			
>		RILEIGH	00	07/18/2008			

Viewing Previously Matched Students

The **Previously Matched** tab automatically displays students that have been matched during the current school year.

To filter results

1. Enter search criteria in the column heading.
2. Click  .



Unmatching Previously Matched Students


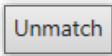
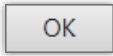
The following criteria must be met in order to unmatch students:

- “Sibling” or “Manual” must be displayed in the **Match Method** column.
- Match must have been made within the current school year.
- Sibling match must still be DC or DC-SNAP.

After students are unmatched, the following actions occur:

- Students return to their previous state. If students were matched during the grace period, they receive “Default” status.
- The **Eligibility** tab on the *Student Details* page is updated with the new status.

To unmatch students

1. Click  in the **Matched Students** listing.
2. Verify the student displayed is to be unmatched and click  .
3. Enter comments and click  .

A success message displays and the student is removed from the **Matched Students** list.

The screenshot illustrates the 'DC Matching' interface. At the top, there are tabs for 'Sibling Match', 'Unmatched', and 'Previously Matched'. Below these are search filters for 'Academic Year' (2013 - 2014), 'Area' (SCHOOLS), 'Site Code' (-- ALL --), and 'Site' (-- ALL --). There are also fields for 'SSN / Student ID', 'Last Name', 'First Name', 'Grade' (--All--), and 'Status' (Active). A 'Match Method' section includes checkboxes for 'System', 'Sibling', and 'Manual', along with 'Apply' and 'Reset' buttons.

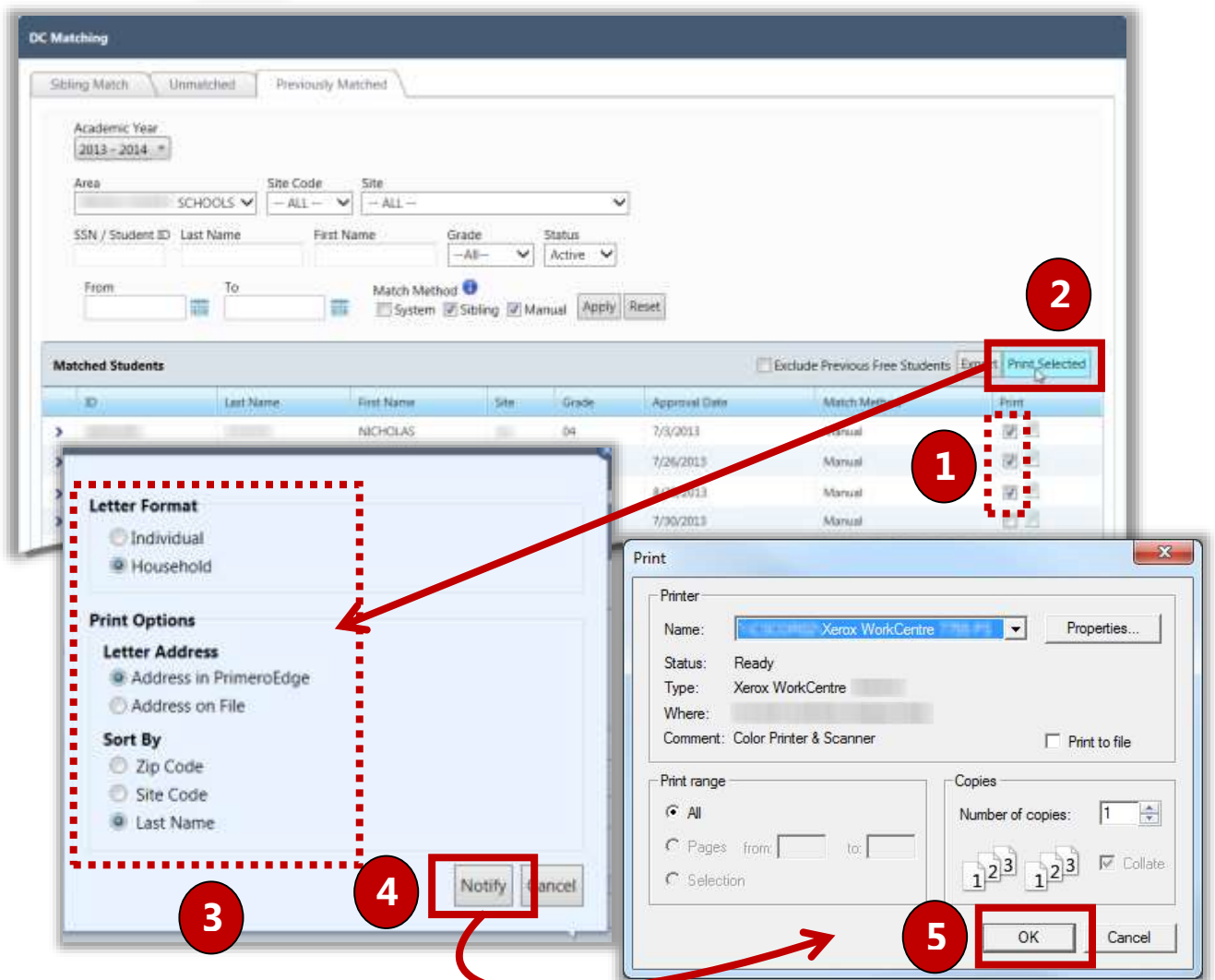
The 'Matched Students' table is shown below, with columns for ID, Last Name, First Name, Site, Grade, Approval Date, Match Method, and Print. A student with ID 960032841 and name JADE is highlighted. A red dashed box labeled '1' surrounds the student's row. A red dashed box labeled '2' surrounds the student's details, including 'Case #:', 'Address: 1115 HOMEWOOD RD,', 'Name on File: JADE', 'DC Type: N/A', 'Guardian Name: KELLI', 'Birth Date: 12/08/1995', and 'Matching Criteria: Manual Match'. A red box labeled '3' highlights the 'Unmatch' button. An 'Unmatch Comments' dialog box is open, with a text area containing 'Incorrect match.' and 'OK' and 'Cancel' buttons. A red arrow points from the 'Unmatch' button to the 'OK' button. Below the dialog box, a green message box states 'Student [redacted] was successfully unmatched.'

The bottom part of the screenshot shows the 'DC Matching' interface after the unmatching process. The 'Matched Students' table now lists two students: ID 960032841 (NICHOLAS, Grade 04) and ID 960039532 (ADDISON, Grade PK).

Printing Letters for Matched Students

To print letters for matched students

1. Click in the **Print** column for all students that are to be included.
2. Click **Notify Selected**.
3. Make the following selections:
 - **Letter Format** – the format to be used for the letters.
 - **Letter Address** – the address to be used on the letters.
 - **Sort By** – the order the letters are to be sorted when printing.
4. Click **Notify**.
5. Click **OK**.

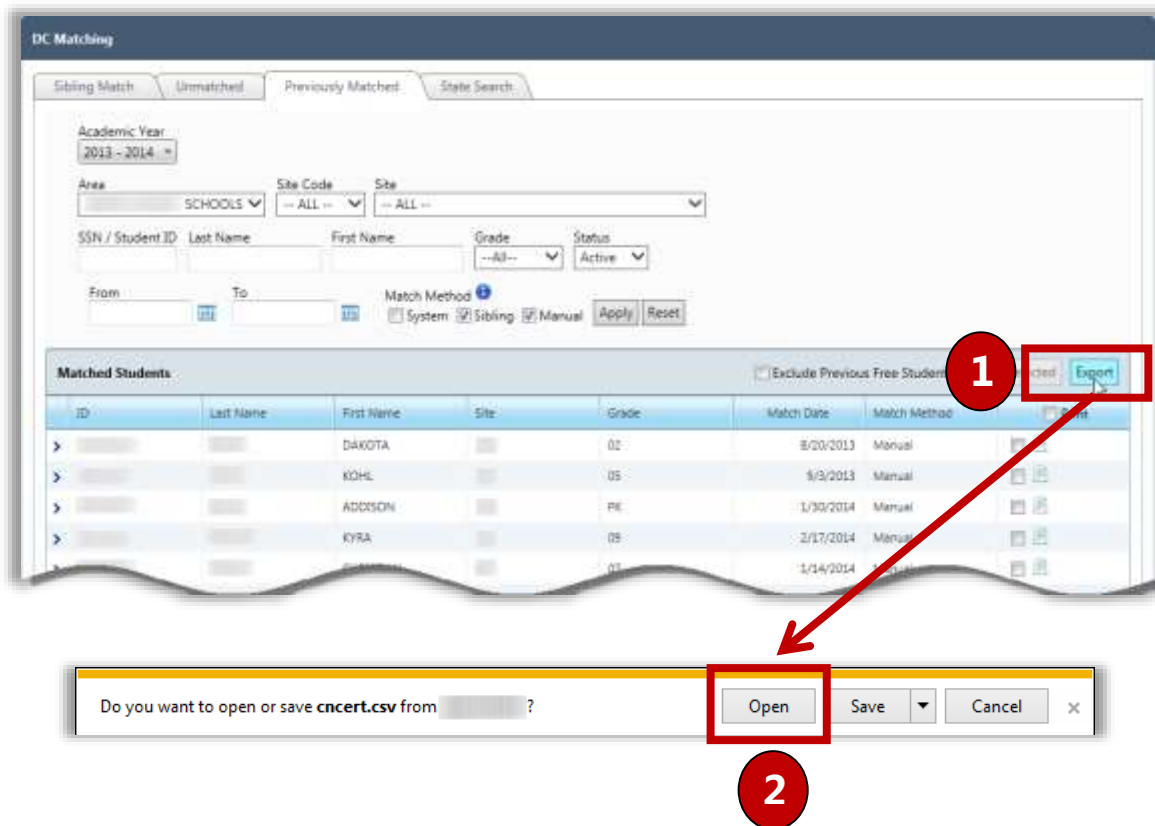


Exporting a Matched Students File

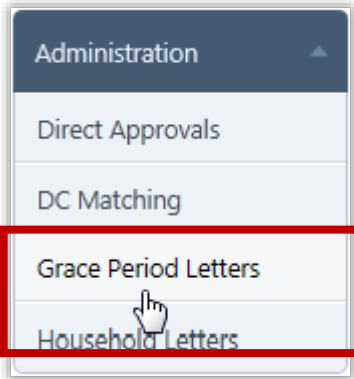
To export a matched students file

1. Click **Export** .
2. Click **Open** .

The matched students display in a .csv file.



Grace Period Letters



Grace Period Letters are letters mailed to families who have not reapplied that 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.


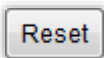
By default, on the **Grace Period Letters** page:

- **Site Code, Site** and **Grade** are set to “ALL”.
- For districts that have one or more CEP-eligible sites, the **Grace Period Type** group box displays and “Standard” is selected.

Grace Period Letters Page



Page Functions

Button	Description
	Click to display a list of students that match the selected conditions.
	Click to return all settings in the search condition fields to the default values.

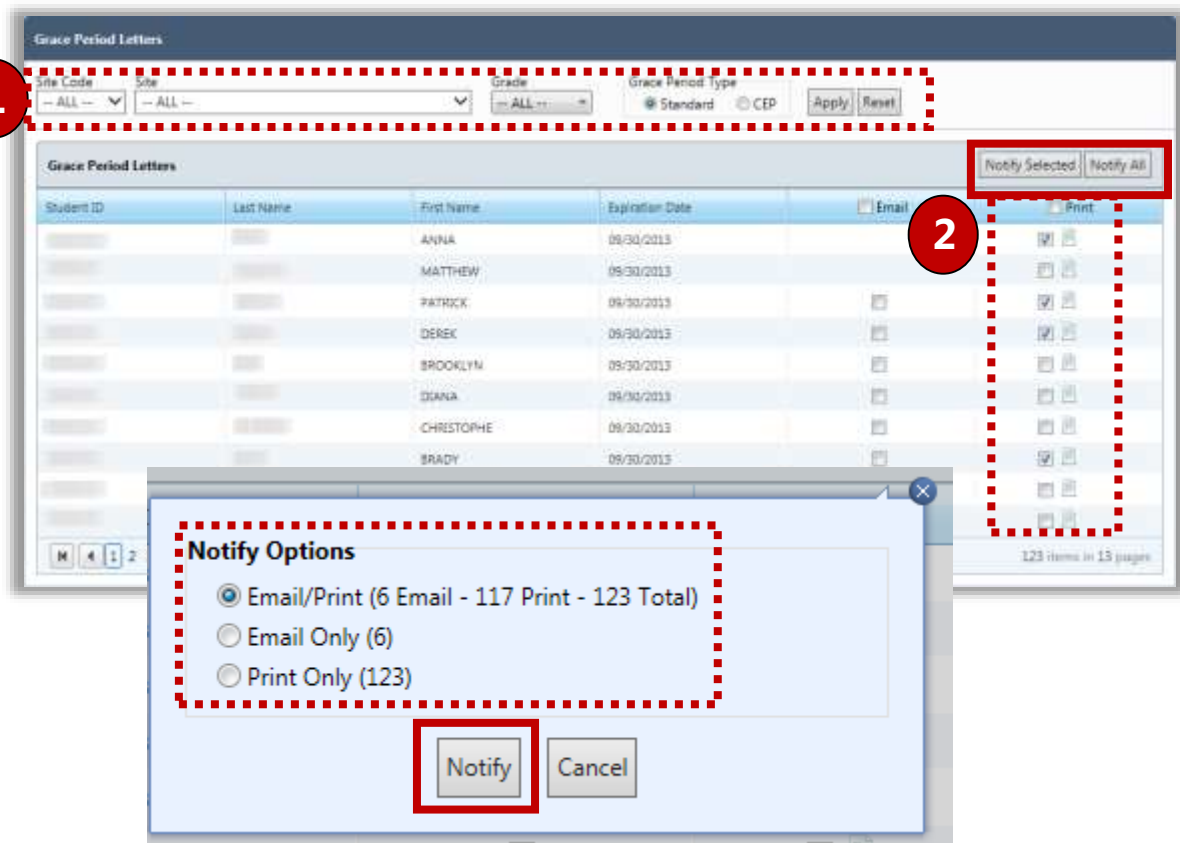
Sending Grace Period Letters

Grace Period letters can be emailed or printed for:

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

To send Grace Period letters



1. Select search conditions and click **Apply** .
2. Perform one of the following actions:
 - Select individual student listings in the **Email** or **Print** columns and click **Notify Selected** , or
 - Click **Notify All** to send all letters. All letters for students with email addresses on file will be emailed and all other letters will be printed. Select the **Notify Options** and click **Notify** .



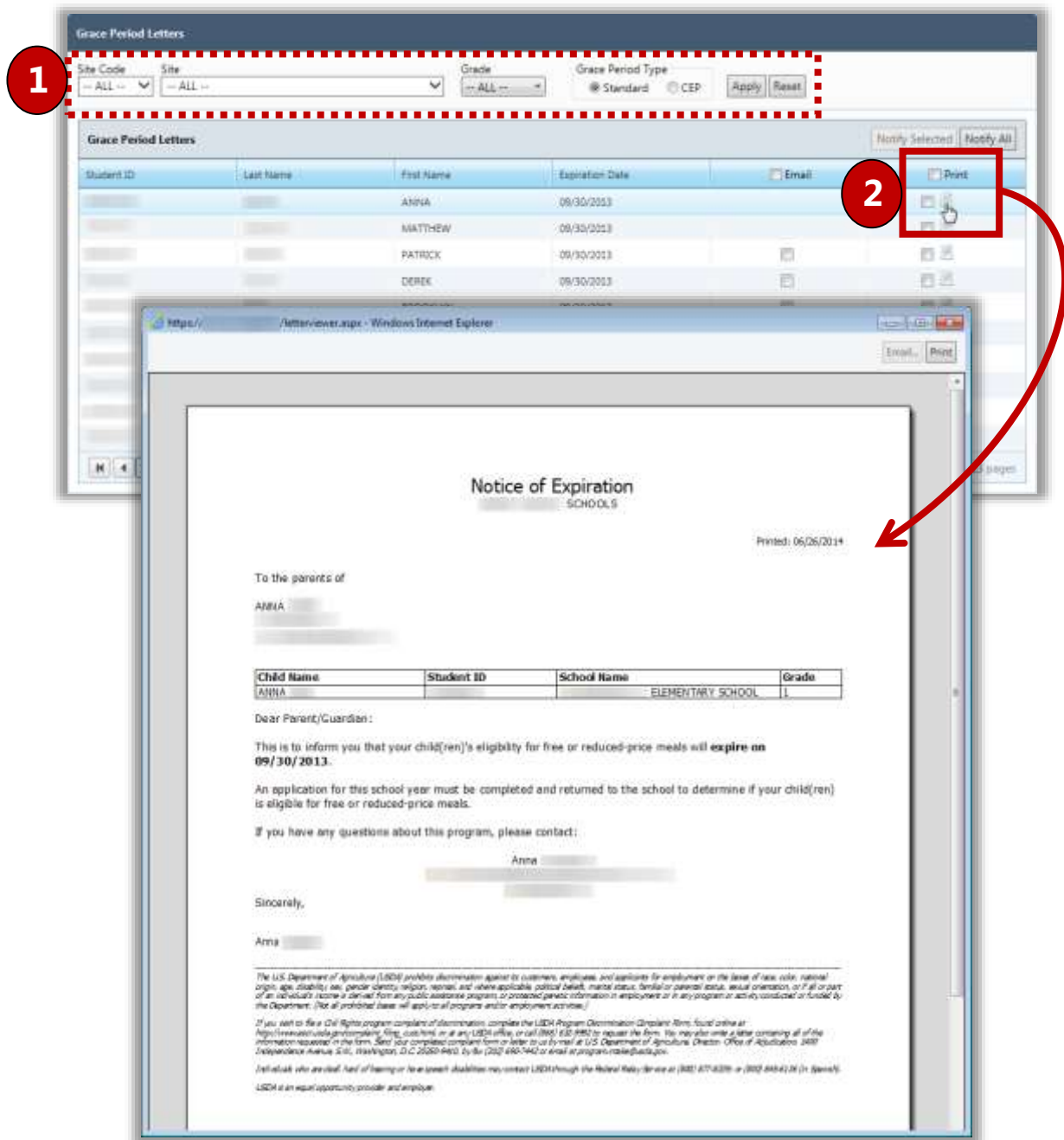
Viewing Letters

An individual Grace Period letter can be viewed before printing.

To view a Grace Period letter

1. Select search conditions and click .
2. In a student listing, click **View Letter** ().

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



The screenshot shows the 'Grace Period Letters' application interface. A red dashed box labeled '1' highlights the search filters (Site Code, Site, Grade, Grace Period Type) and the Apply/Reset buttons. A red box labeled '2' highlights the Print button in the top right of the student listing table. A red arrow points from the Print button to a preview window titled 'Letter Viewer.aspx' which displays a 'Notice of Expiration' letter for a student named ANNA.

Grace Period Letters

Site Code: -- ALL -- Site: -- ALL -- Grade: -- ALL -- Grace Period Type: Standard CEP

Student ID	Last Name	First Name	Expiration Date	Email
		ANNA	09/30/2013	<input type="checkbox"/>
		MATTHEW	09/30/2013	<input type="checkbox"/>
		PATRICK	09/30/2013	<input type="checkbox"/>
		DEREK	09/30/2013	<input type="checkbox"/>

Notice of Expiration
SCHOOLS

Printed: 06/26/2014

To the parents of
ANNA

Child Name	Student ID	School Name	Grade
ANNA		ELEMENTARY SCHOOL	1

Dear Parent/Guardian:

This is to inform you that your child(ren)'s eligibility for free or reduced-price meals will **expire on 09/30/2013**.

An application for this school year must be completed and returned to the school to determine if your child(ren) is eligible for free or reduced-price meals.

If you have any questions about this program, please contact:

Anne

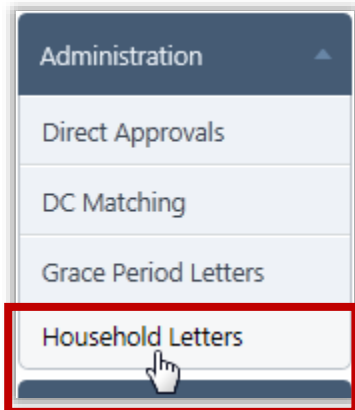
Sincerely,
Anne

The U.S. Department of Agriculture (USDA) prohibits discrimination against its customers, employees, and applicants for employment on the basis of race, color, national origin, age, disability, sex, gender identity, religion, marital and veteran status, political beliefs, marital status, familial or parental status, sexual orientation, or if all or part of an individual's income is derived from any public assistance program, or protected genetic information in employment or in any program or activity conducted or funded by the Department. (Not all prohibited bases will apply to all programs and/or employment activities.)

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If you wish to file a complaint of harassment or retaliation, contact the National Relay Service at (800) 677-6328 or (800) 848-6213 (in Spanish). USDA is an equal opportunity provider and employer.

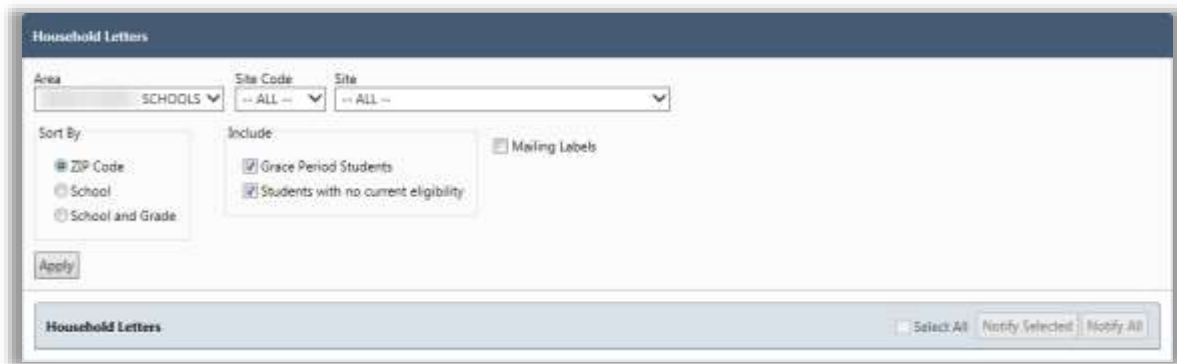
Household Letters



Household letters can be used to mail applications to families. The information contained on 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.

★ Note: It is important to edit this letter for district/county specific information before printing.



By default, on the **Household Letters** page:

- **Site Code** / **Site** is set to “ALL” unless you have access to a single site.
- **Sort By** is set to “Zip Code”.
- Both **Include** options (“Grace Period Students” and “Students with no current eligibility”) are selected.


Button	Description
	Click to display a list of records that match the selected conditions.

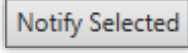
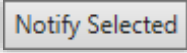
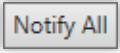
Sending Letters

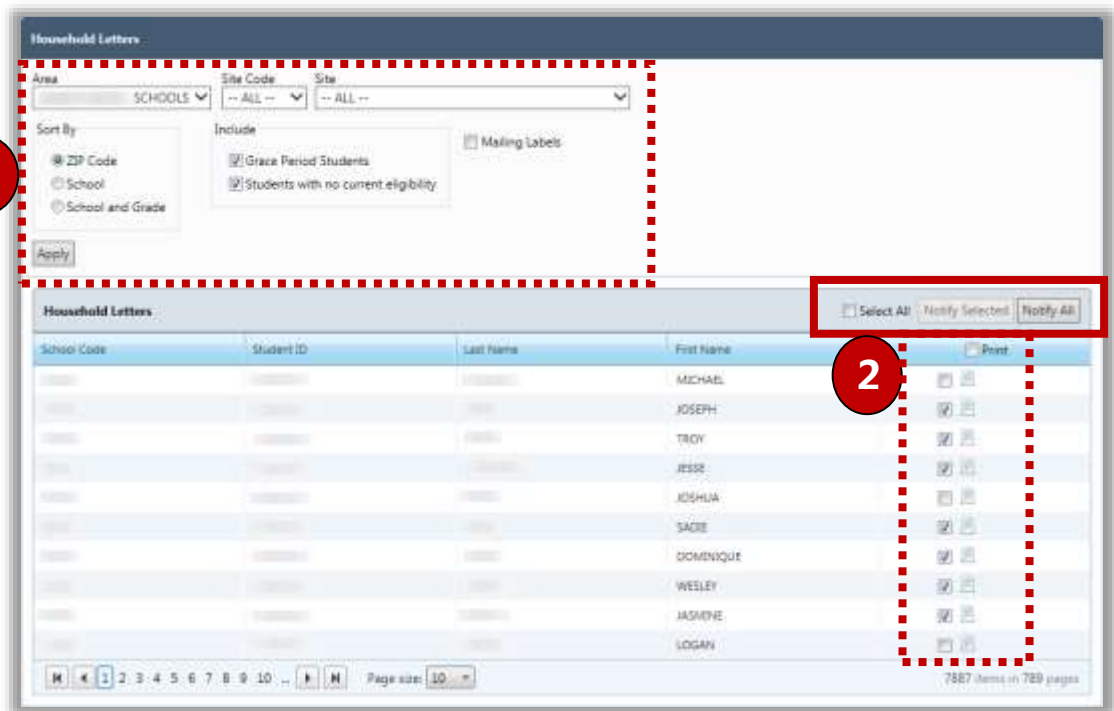
Household Letters can be printed for

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

To send Household Letters

1. Select search conditions and click .
2. Do one of:

- Select individual student listings and click .
- Select **Select All** and click .
- Note: Clear individual student listings to not print a letter for a household.
- Click  to print all letters to all households.




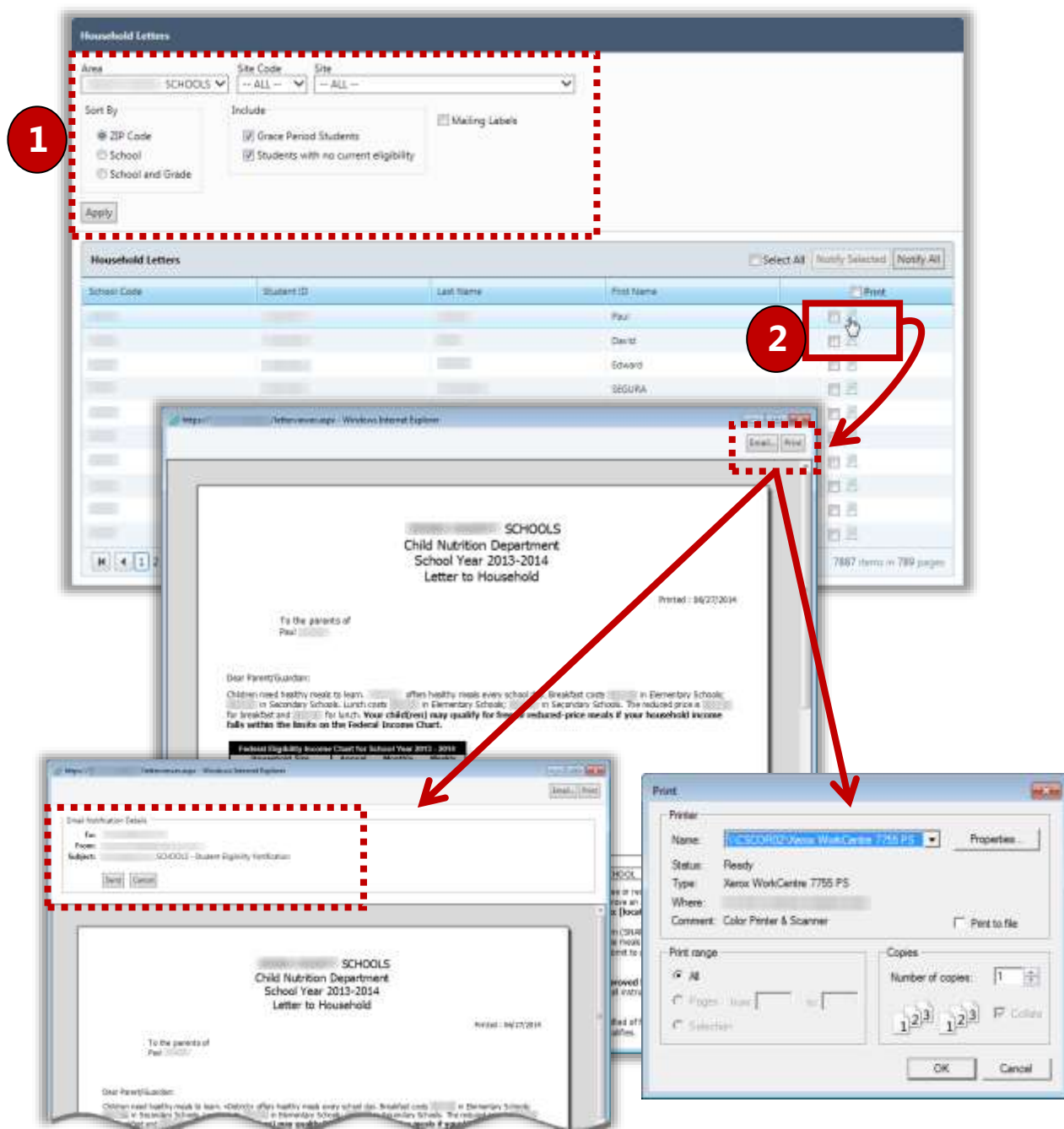
The screenshot shows the 'Household Letters' interface. A red dashed box labeled '1' highlights the search filters: Area (SCHOOLS), Site Code (-- ALL --), Site (-- ALL --), Sort By (ZIP Code, School, School and Grade), and Include (Grace Period Students, Students with no current eligibility, Making Labels). Below the filters is an 'Apply' button. A table of student listings is shown below, with columns for School Code, Student ID, Last Name, First Name, and Print. A red dashed box labeled '2' highlights the 'Print' column, which contains checkboxes for each student. At the top of the table, there are buttons for 'Select All', 'Notify Selected', and 'Notify All'. The table lists students: MICHAEL, JOSEPH, TROY, JESS, JOSHUA, SAGE, DOMINIQUE, WESLEY, JASVINE, and LOGAN. The page size is set to 10, and there are 7887 items on 789 pages.

Viewing Letters

An individual Household letter can be viewed before emailing or printing.

To view a Household letter

1. Select search conditions and click **Apply** .
2. In a student listing, click **View Letter** ().
The letter can then be emailed or printed.



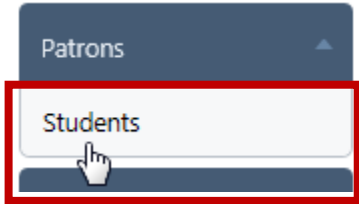
4

Patrons

This section includes the following:

- ✓ Review of *Students* page elements.
- ✓ Steps to view a student record.
- ✓ Review of student particulars data.
- ✓ Steps to change the student's assigned Eligibility.
- ✓ Review of student demographic data.
- ✓ Review of student household data.
- ✓ Steps to upload or remove a student picture.
- ✓ Steps to set A La Carte restrictions.
- ✓ Steps to add Special Instructions.
- ✓ Steps to set Menu Item restrictions.
- ✓ Steps to set other payment types restrictions.
- ✓ Review enrollment history.



Students



Students allows you to display and manually update a student’s PrimeroEdge record. The student record includes personal information and all eligibility information. Some information cannot be updated. Other information can be updated but will be overwritten with the next student file import.


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

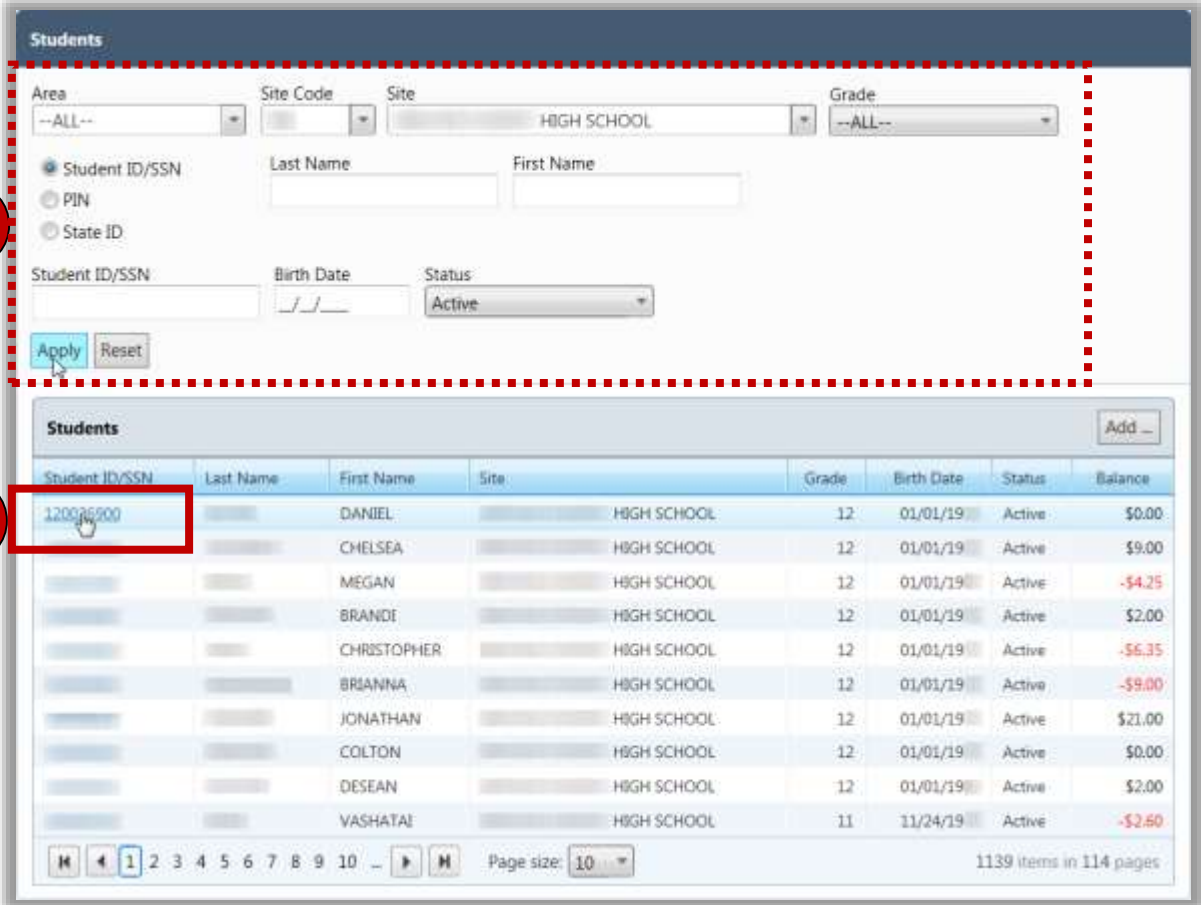
- **Site Code / Site** is set to “ALL”.
- **Grade** is set to “All”.
- Student ID / SSN, Last Name, and First Name are blank (empty).
- **Status** is set to “Active”.

Button	Description
	Click to display a list of students that match the selected conditions.
	Click to return all settings in the search condition fields to the default values.

Viewing a Student Record

To view a student record

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



The screenshot shows the 'Students' interface. At the top, there are search filters for Area, Site Code, Site, and Grade. 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 dropdown for Status. An 'Apply' button is highlighted with a red dashed box and a red circle with the number '1'. Below the filters is a table of students. The first row of the table has the ID '12006500' highlighted with a red solid box and a red circle with the number '2'. The table columns are Student ID/SSN, Last Name, First Name, Site, Grade, Birth Date, Status, and Balance. The bottom of the table shows pagination controls and a page size of 10.


Student ID/SSN	Last Name	First Name	Site	Grade	Birth Date	Status	Balance
12006500		DANIEL	HIGH SCHOOL	12	01/01/19	Active	\$0.00
		CHELSEA	HIGH SCHOOL	12	01/01/19	Active	\$9.00
		MEGAN	HIGH SCHOOL	12	01/01/19	Active	-\$4.25
		BRANDE	HIGH SCHOOL	12	01/01/19	Active	\$2.00
		CHRISTOPHER	HIGH SCHOOL	12	01/01/19	Active	-\$6.35
		BRIANNA	HIGH SCHOOL	12	01/01/19	Active	-\$9.00
		JONATHAN	HIGH SCHOOL	12	01/01/19	Active	\$21.00
		COLTON	HIGH SCHOOL	12	01/01/19	Active	\$0.00
		DESEAN	HIGH SCHOOL	12	01/01/19	Active	\$2.00
		VASHATAI	HIGH SCHOOL	11	11/24/19	Active	-\$2.60

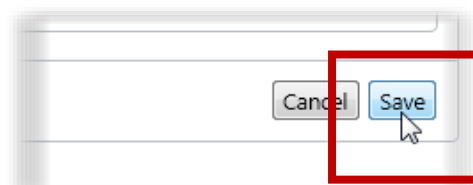
The **Student Details** page appears with seven tabs of information for the student. Some information can be updated while other information cannot be changed.

Keep in mind that some data that can be changed manually, such as Eligibility on the Particulars tab, may be overwritten when data is imported from the Student Information System.

To save changes

Changes are saved with one click.

- With any tab on display, click  .



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: ANNA

[Back to Students](#)

Particulars | Demographics | Household | Eligibility | Picture and Notes | Allergies and Restrictions | Enrollment History

First Name: ANNA
Last Name: [Redacted]
Middle Name: [Redacted]
SSN: [Redacted]
Home Phone: [Redacted]
Address: 121 SAMS ST
Apt: [Redacted]
City: [Redacted]
State: [Redacted]
Zip: [Redacted]

Site: ELEMENTARY SCHOOL
Grade: 1
Homeroom: SCOT T

Student ID: [Redacted]
PIN: [Redacted]
State ID: [Redacted]

Eligibility <input type="button" value="Edit"/>		
Eligibility	Reason	Expiration Date
Free	GRACEPERIOD	8/30/2013

Current Balance is **\$54.00**

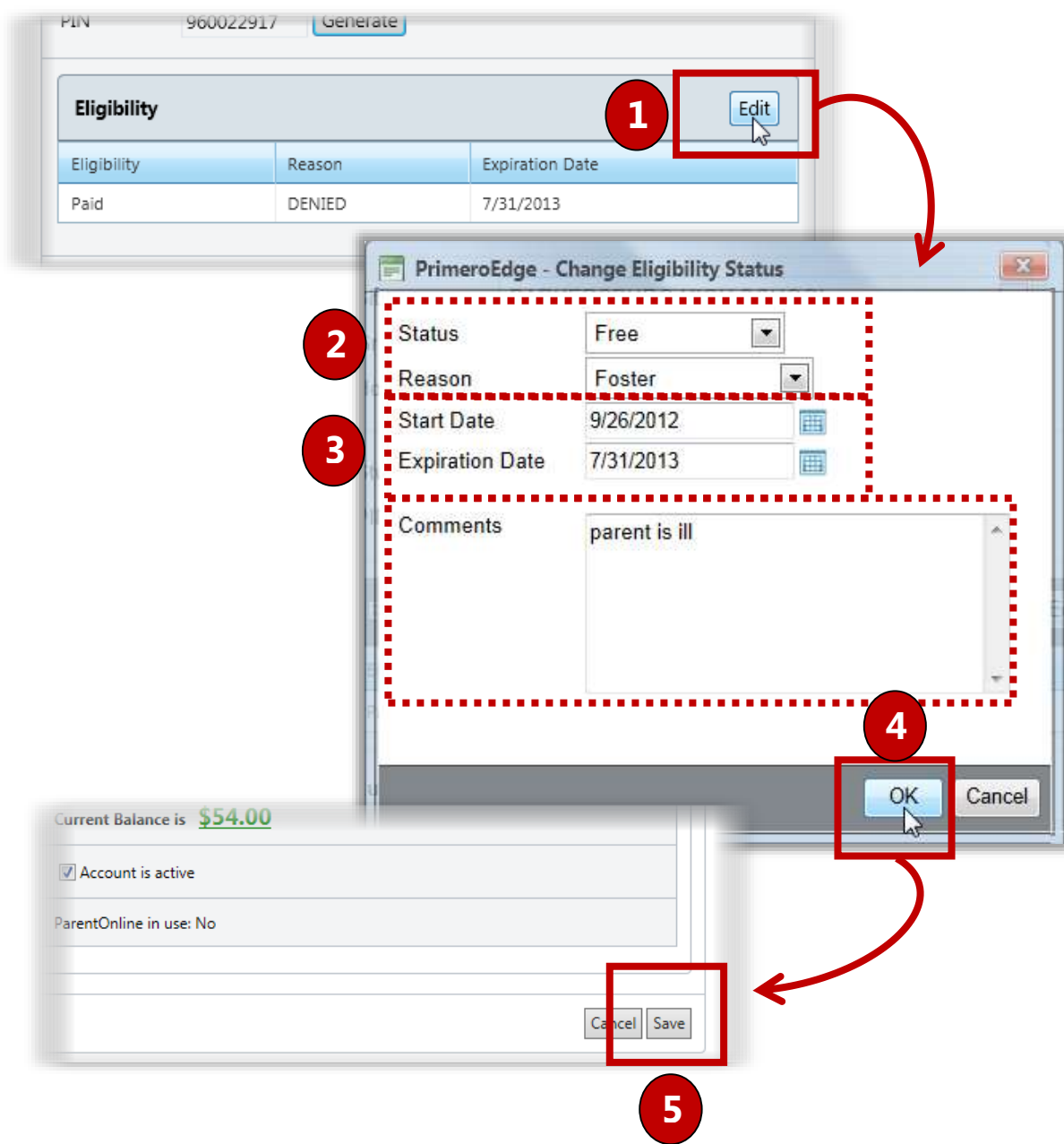
Account is active

ParentOnline in use: No

❖ Note: Make changes to student data in the Student Information System, not in PrimeroEdge. Changes made in PrimeroEdge could be overwritten by the next import from the Student Information System.

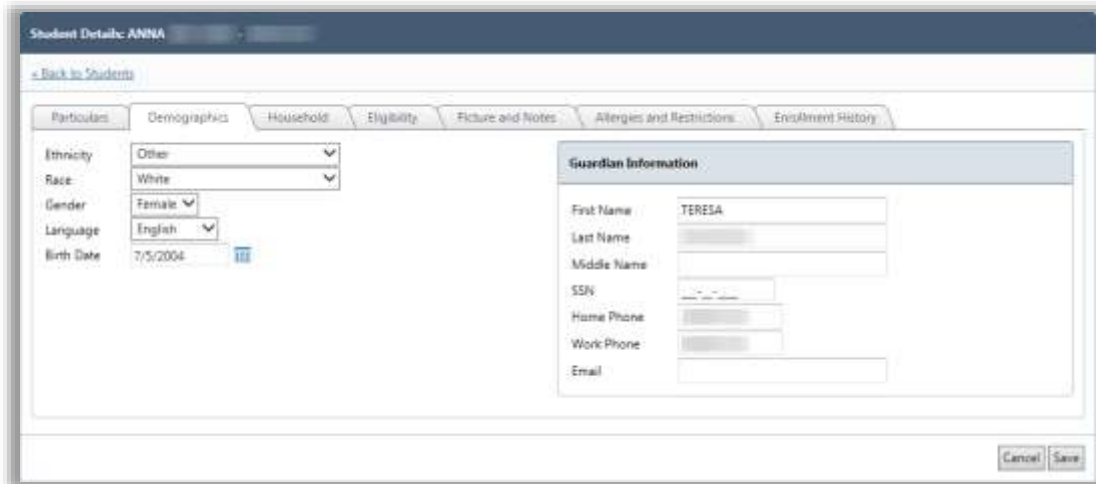
Manually Changing Eligibility

1. Click **Edit** on the **Particulars** tab of a student record 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 new **Start Date** when the new Eligibility begins and a new **Expiration Date**, if needed.
4. Enter **Comments** (required) and click **OK**.
5. Click **Save**.



Tab 2 – Demographics

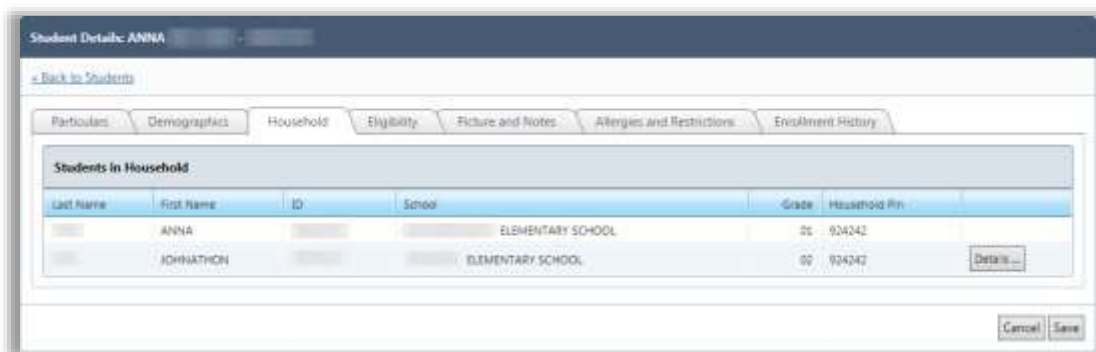
The **Demographics** tab lists demographic and Guardian information imported from the Student Information System.



- ❖ Note: Make changes to student data in the Student Information System, not in PrimeroEdge. Changes made in PrimeroEdge could be overwritten by the next import.

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.



- ❖ Note: No changes can be made on this tab.

Tab 4 – Eligibility

The **Eligibility** tab displays the student’s status 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 “0” (zero). The application number (other than “0” [zero]) is a link that displays the application in the *View Application* popup.

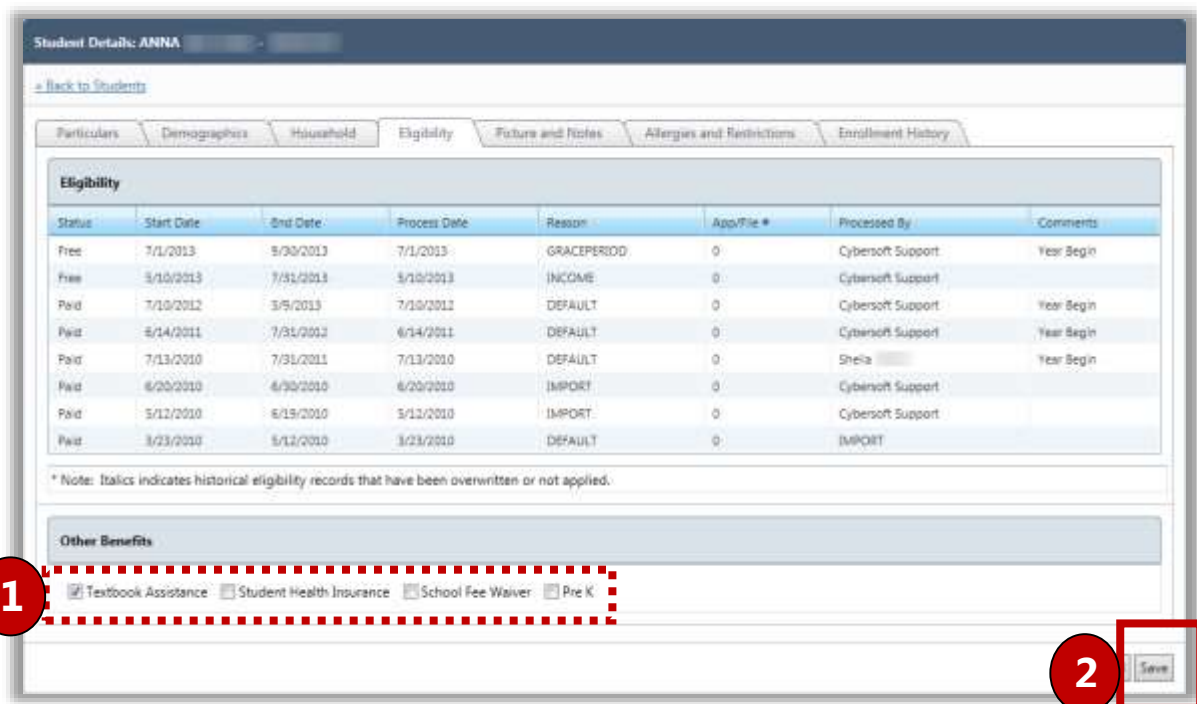
★ Note: No changes can be made to Eligibility information on this tab.

The **Other Benefits** group lists all additional benefits offered.

To add or remove Other Benefits

1. Select one or more benefits.

2. Click  .



Student Details: ANNA

Back to Students

Particulars Demographics Household Eligibility Picture and Notes Allergies and Restrictions Enrollment History

Eligibility

Status	Start Date	End Date	Process Date	Reason	App/File #	Processed By	Comments
Free	7/1/2013	9/30/2013	7/1/2013	GRACEPERIOD	0	Cybersoft Support	Year Begin
Free	9/10/2013	7/31/2013	9/10/2013	INCOME	0	Cybersoft Support	
Paid	7/10/2012	3/9/2013	7/10/2012	DEFAULT	0	Cybersoft Support	Year Begin
Paid	6/14/2011	7/31/2011	6/14/2011	DEFAULT	0	Cybersoft Support	Year Begin
Paid	7/13/2010	7/31/2011	7/13/2010	DEFAULT	0	Shela	Year Begin
Paid	6/20/2010	6/30/2010	6/20/2010	IMPORT	0	Cybersoft Support	
Paid	5/12/2010	6/19/2010	5/12/2010	IMPORT	0	Cybersoft Support	
Paid	3/23/2010	5/12/2010	3/23/2010	DEFAULT	0	IMPORT	

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

Other Benefits

Textbook Assistance Student Health Insurance School Fee Waiver Pre K

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 .
2. Select a picture file and click .
3. Click .

To remove a picture

1. Click .

The “Happy Face” icon replaces the image.

The selected image appears in the Picture group.



Tab 6 – 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: ANNA

[Back to Students](#)

Particulars | Demographics | Household | Eligibility | Picture and Notes | **Allergies and Restrictions** | Enrollment History

Allergens * Custom Allergens

<input checked="" type="checkbox"/> Crustacean Shellfish	<input type="checkbox"/> Egg	<input type="checkbox"/> Fish
<input type="checkbox"/> Gluten	<input type="checkbox"/> Milk	<input type="checkbox"/> Peanuts
<input type="checkbox"/> Soy	<input type="checkbox"/> Tree Nuts	<input type="checkbox"/> Wheat
<input type="checkbox"/> Apples	<input type="checkbox"/> Avocado	<input type="checkbox"/> Banana

Menu Item Restrictions Remove Add ...

No records to display.

Other Restrictions

Do not accept checks on this account

No charges allowed

Special Instructions

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

A La Carte Item Restrictions Max Per Day

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

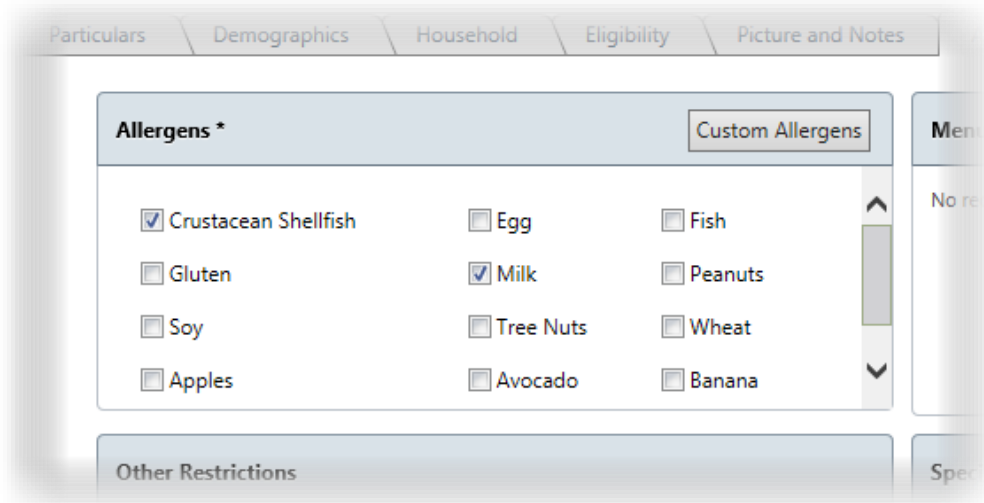
*** Allergen Feature Disclaimer**

- 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.

Selecting Allergens

In the **Allergens** section:

- Select the allergens to which the student is allergic.

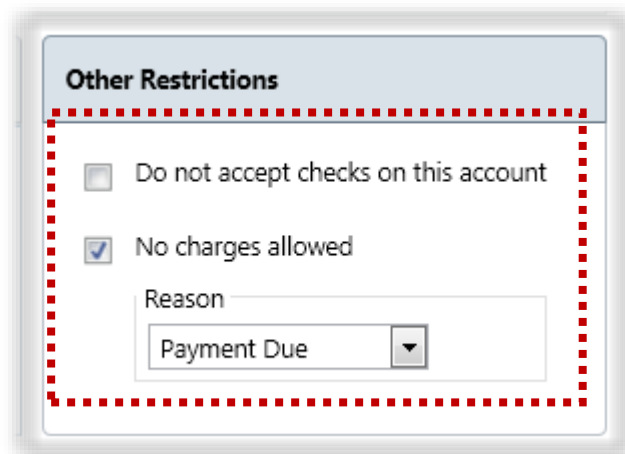


Setting Other Restrictions

Other Restrictions include other payment methods (checks and charges).

To set Other Restrictions:

1. Select an option (add check mark).
2. Select a Reason if **No charges allowed** is selected.



Setting A La Carte Restrictions

In the **A La Carte Item Restrictions** section:

- Select days of the week on which the student cannot use cash or debit their account for a la carte items.
- Enter the number of a la carte items the student can purchase each day.

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

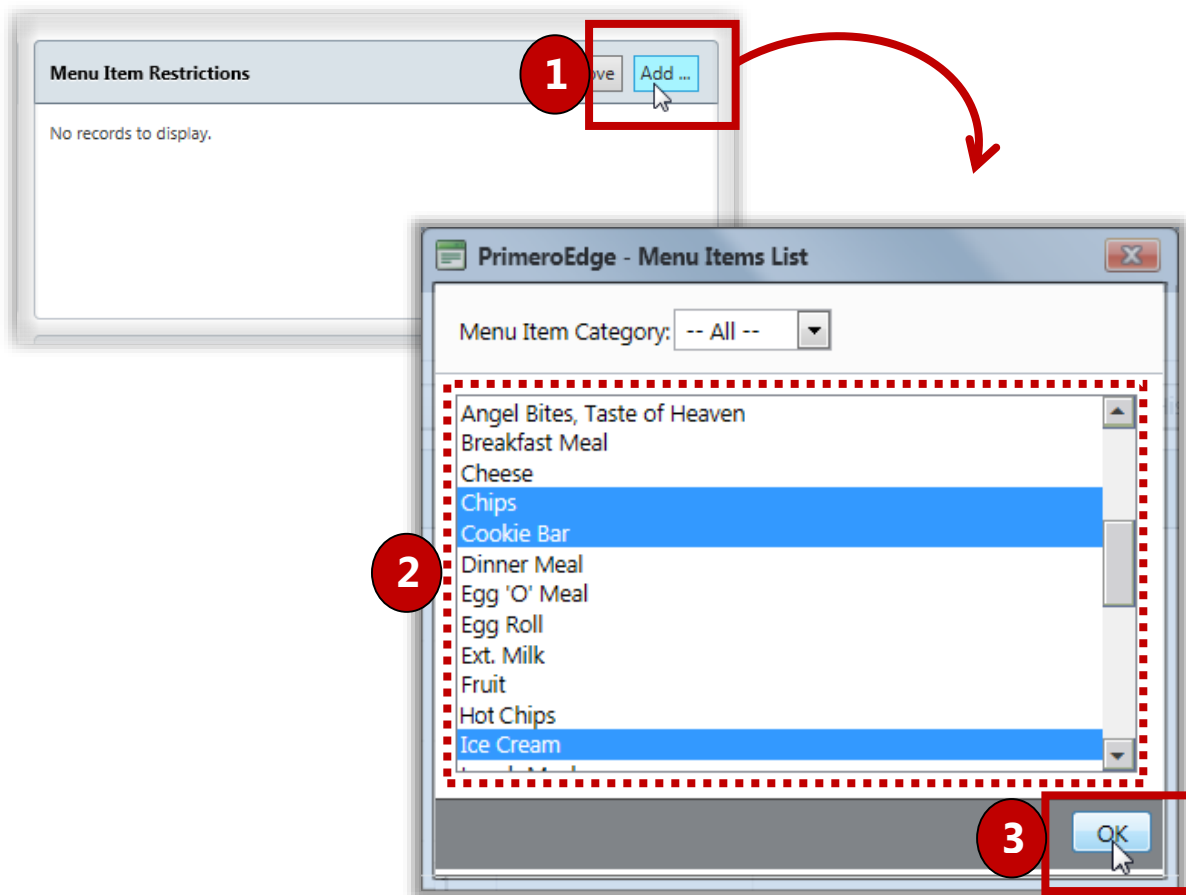
Setting Menu Item Restrictions

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

To add a Menu Item

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

★ Note: Hold down **Shift** to select a group of items, or hold down **Ctrl** to select individual items.



To remove a Menu Item:

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

Including 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:

- Click inside **Special Instructions** and enter text.

Special Instructions

No meat on Fridays.

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

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.

⚠ Note: No changes can be made on this tab.

Student Details: ANNA

[Back to Students](#)

Particulars | Demographics | Household | Eligibility | Picture and Notes | Allergies and Restrictions | **Enrollment History**

Enrollment History				
School	Grade	Start Date	End Date	Activity Date
MIDDLE SCHOOL	07	08/16/2010	N/A	8/18/2010

Cancel Save

<<End of Section>>

5


Application Reports

In this section, you will learn how to generate and print the following reports:

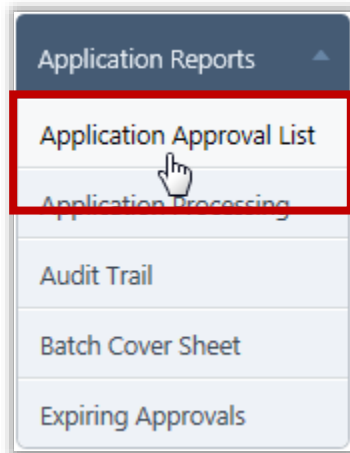
- ✓ Application Approval List
- ✓ Application Processing
- ✓ Audit Trail
- ✓ Batch Cover Sheet
- ✓ Expiring Approvals

Application Reports at a Glance

Menu Function	Description
Application Approval List	Details applications processed on a selected date or date range.
Application Processing	Provides the Application Cycle Timeline report and the Application Processing report. Details the length of time applications remain at various stages in the application process
Audit Trail	Details all eligibility changes that occurred on a selected day.
Batch Cover Sheet	Provides batch particulars and lists applications scanned in the batch
Expiring Approvals	Lists all students whose Grace Period expires before the end of the Academic Year

 Note: Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Application Reports** menu, you may see a subset of the functions listed above or you may not have access to all of the features for each menu selection.

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.

By default, on the **Application Approval List** page:

- **Site Code / Site** are set to your site, or set to “ALL” if you have access to multiple sites.
- **Date Range** is set to the current date.
- **Eligibility** is set to “ALL”.
- **User** is blank.

Application Approval List Page

 A screenshot of the 'Application Approval List' page. It features several input fields and a 'Generate Report' button. The fields include:


- Site Code: A dropdown menu.
- Site: A dropdown menu.
- Date Range: Three radio button options:
 - Daily**: Selected, with a 'From' date of 5/17/2013 and a calendar icon.
 - Monthly**: Unselected, with 'Month' set to May and 'Year' set to 2013.
 - Date Range**: Unselected, with 'From' date of 5/1/2013 and 'To' date of 5/17/2013, each with a calendar icon.
- Eligibility: A dropdown menu set to '-- ALL --'.
- User: A text input field with a blue '...' button next to it.
- Generate Report: A button at the bottom right.

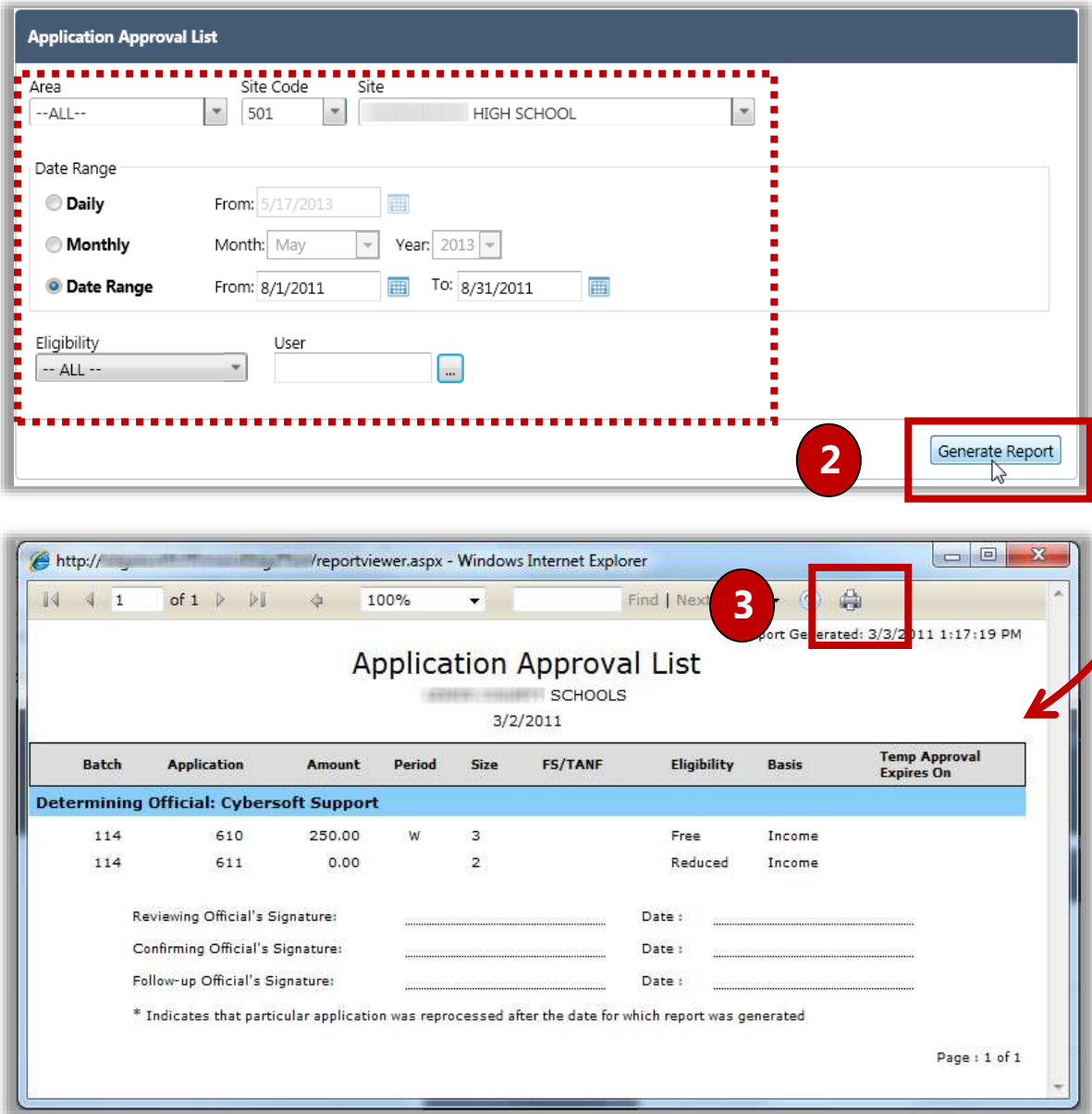
Page Functions

Button	Description
	Click to display a list of students that match the selected conditions.

To display an Application Approval List

1. In **Date**, enter or select a date.
2. Click .

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

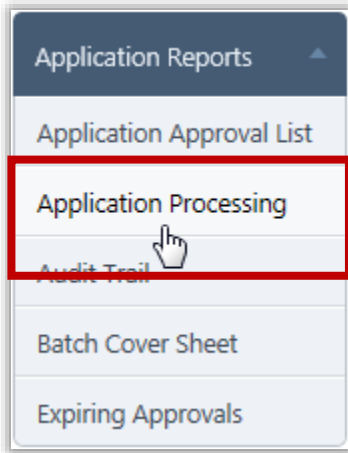


The screenshot shows the 'Application Approval List' interface. A red dashed box labeled '1' highlights the search and filter criteria: Area (set to --ALL--), Site Code (501), Site (HIGH SCHOOL), Date Range (set to Date Range with From: 8/1/2011 and To: 8/31/2011), and Eligibility (set to -- ALL --). A red box labeled '2' highlights the 'Generate Report' button. A red arrow points from this button to the second screenshot. The second screenshot shows the report viewer in a browser window. A red box labeled '3' highlights the 'Print' icon in the browser's toolbar. The report content includes the title 'Application Approval List', the text 'SCHOOLS 3/2/2011', and a table with the following data:

Batch	Application	Amount	Period	Size	FS/TANF	Eligibility	Basis	Temp Approval Expires On
Determining Official: Cybersoft Support								
114	610	250.00	W	3		Free	Income	
114	611	0.00		2		Reduced	Income	

Below the table, there are signature lines for 'Reviewing Official's Signature', 'Confirming Official's Signature', and 'Follow-up Official's Signature', each followed by a 'Date:' field. A note at the bottom states: '* Indicates that particular application was reprocessed after the date for which report was generated'. The page number 'Page : 1 of 1' is visible in the bottom right corner.

Application Processing



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

The Application Cycle Timeline report displays the unprocessed application numbers that are nearing the processing deadline. This report also provides a summary including the number 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.

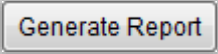
By default on the **Application Processing** page:

- **Application Cycle Timeline** is selected.


Application Processing Page

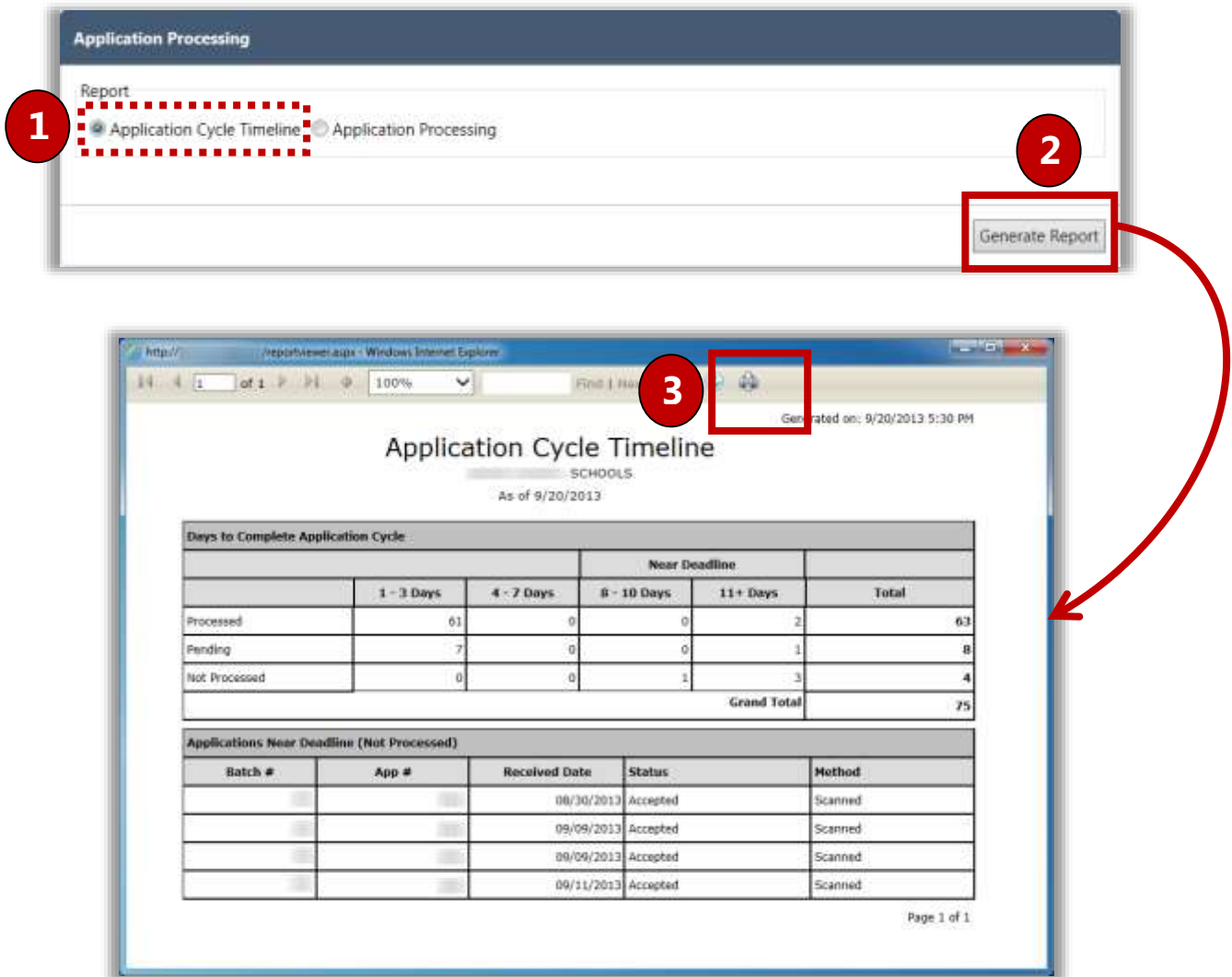


Page Functions


Button	Description
	Click to display a list of applications that match the selected conditions.

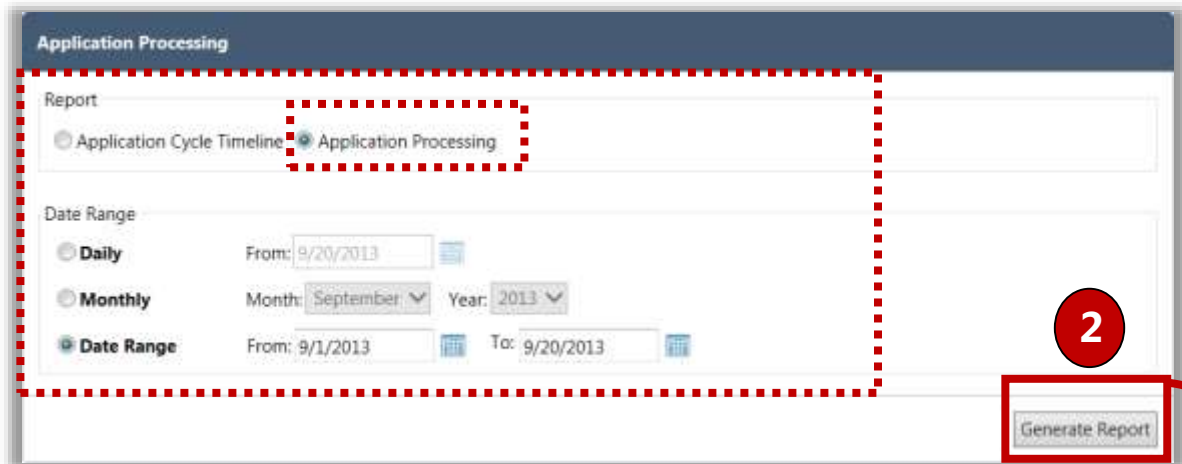
To generate and print an Application Cycle Timeline report

1. Select **Application Cycle Timeline**.
2. Click **Generate Report**.
3. Click **Print** () on the window toolbar.



To generate and print an Application Processing report

1. Select **Application Processing**, and select a date option and enter or select a date.
2. Click **Generate Report**.
3. Click **Print** () on the window toolbar.



Application Processing

Report

Application Cycle Timeline Application Processing

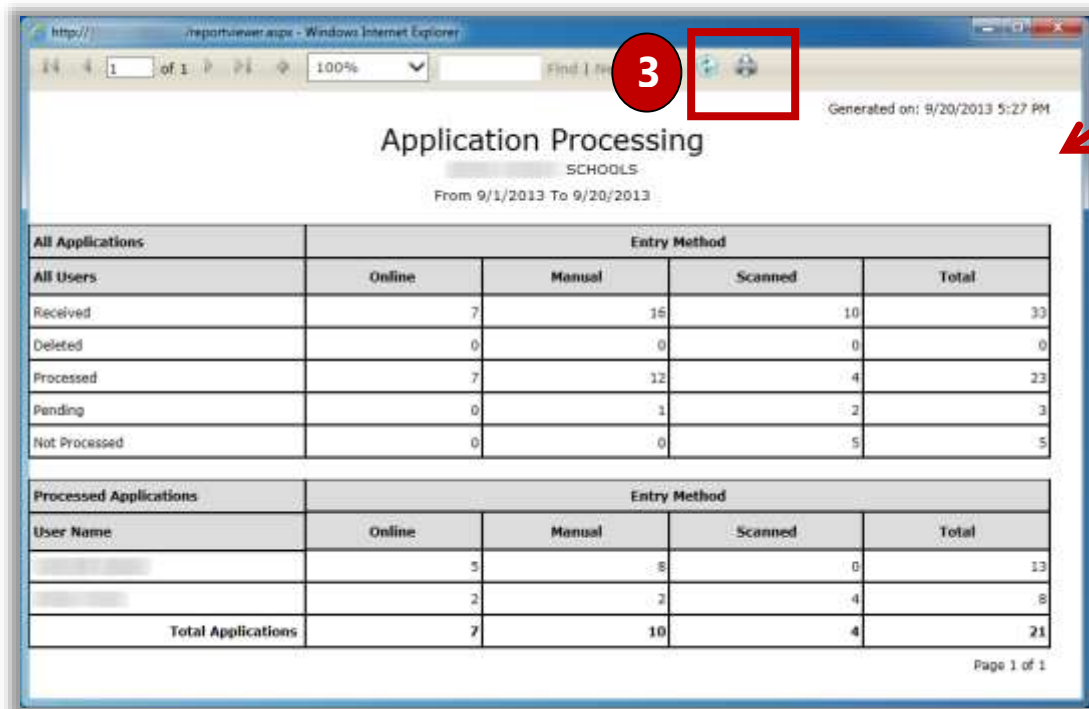
Date Range

Daily From: 9/20/2013

Monthly Month: September Year: 2013

Date Range From: 9/1/2013 To: 9/20/2013

Generate Report

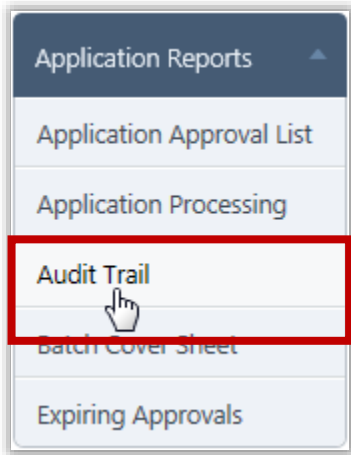


Application Processing
SCHOOLS
From 9/1/2013 To 9/20/2013

All Applications		Entry Method			
All Users	Online	Manual	Scanned	Total	
Received	7	16	10	33	
Deleted	0	0	0	0	
Processed	7	12	4	23	
Pending	0	1	2	3	
Not Processed	0	0	5	5	
Processed Applications		Entry Method			
User Name	Online	Manual	Scanned	Total	
	5	8	0	13	
	2	2	4	8	
Total Applications	7	10	4	21	

Page 1 of 1

Audit Trail

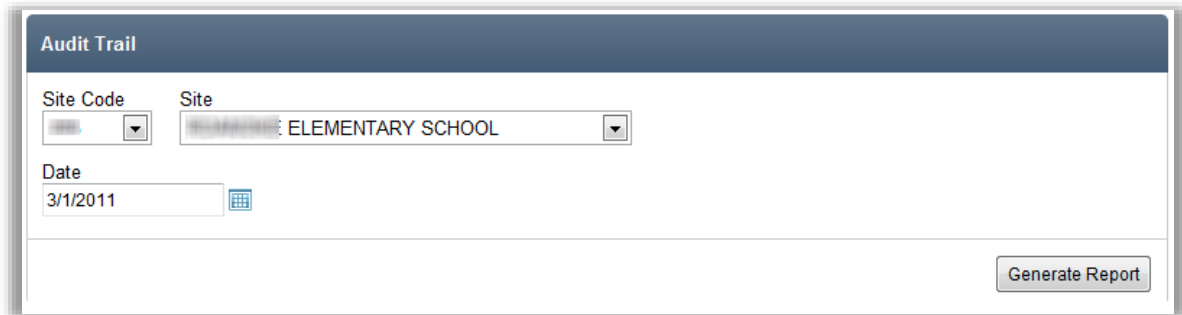


Audit Trail lists all eligibility changes that occurred on a selected day and lists the reason for each change.

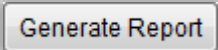
By default, on the **Audit Trail** page:

- **Site Code / Site** are set to your site, or set to “ALL” if you have access to multiple sites.
- **Date** is set to the current date.

Audit Trail Page

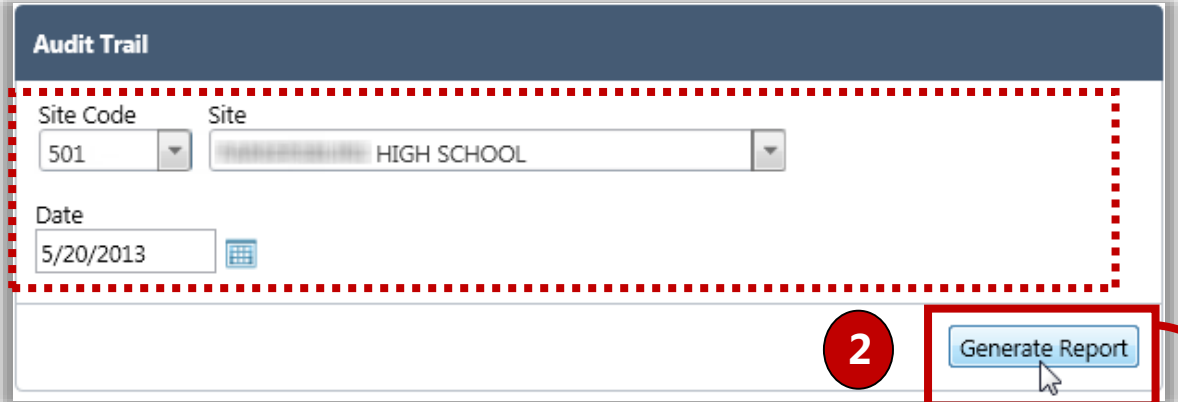


Page Functions

Button	Description
	Click to display a list of students that match the selected conditions.

To generate and print an Audit Trail report:

1. Select a **Site** or **Site Code** and enter or select a **Date**.
2. Click **Generate Report**.
3. Click **Print** () on the window toolbar.



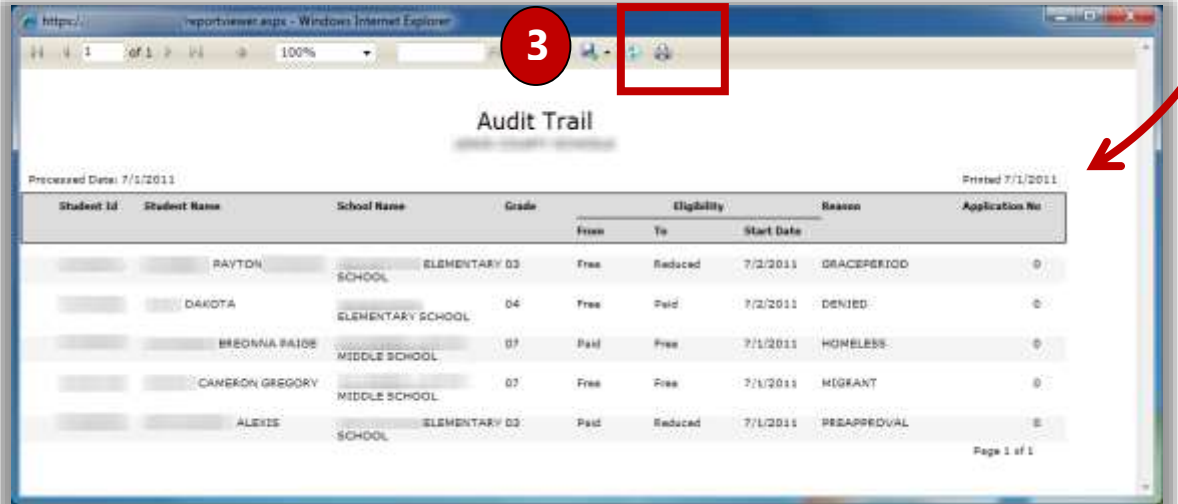
1

Audit Trail

Site Code: 501 Site: HIGH SCHOOL

Date: 5/20/2013

2 Generate Report



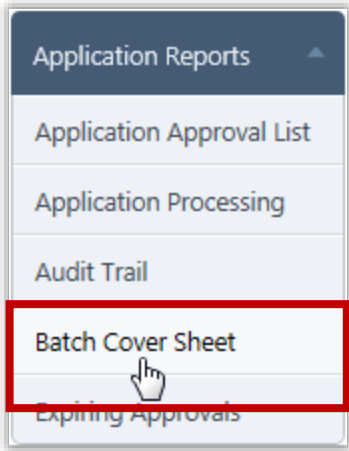
3

Printed 7/1/2011

Student Id	Student Name	School Name	Grade	From	To	Eligibility	Start Date	Reason	Application No
	RAYTON	SCHOOL	ELEMENTARY 03	Free	Reduced		7/2/2011	GRACEPERIOD	0
	DAKOTA	ELEMENTARY SCHOOL	04	Free	Paid		7/2/2011	DENIED	0
	BREONNA PAIGE	MIDDLE SCHOOL	07	Paid	Free		7/1/2011	HOMELESS	0
	CAMERON GREGORY	MIDDLE SCHOOL	07	Free	Free		7/1/2011	MIGRANT	0
	ALEXIS	SCHOOL	ELEMENTARY 03	Paid	Reduced		7/1/2011	PREAPPROVAL	0

Page 1 of 1

Batch Cover Sheet

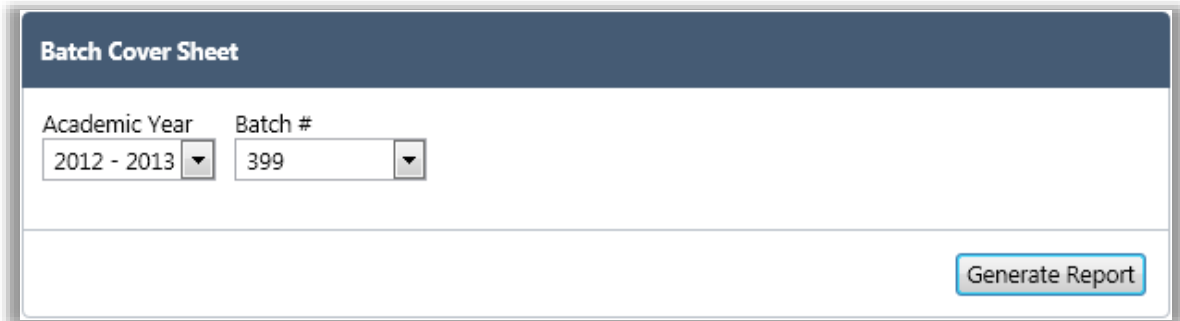


Batch Cover Sheet provides batch particulars and lists applications scanned in the batch. This report can also be printed after scanning a batch. This function allows the user to re-print the Batch Cover Sheet.

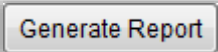
By default on the **Batch Cover Sheet** page:

- **Academic Year** is set to the current school year.
- **Batch #** is set to the last-created batch number.


Batch Cover Sheet Page

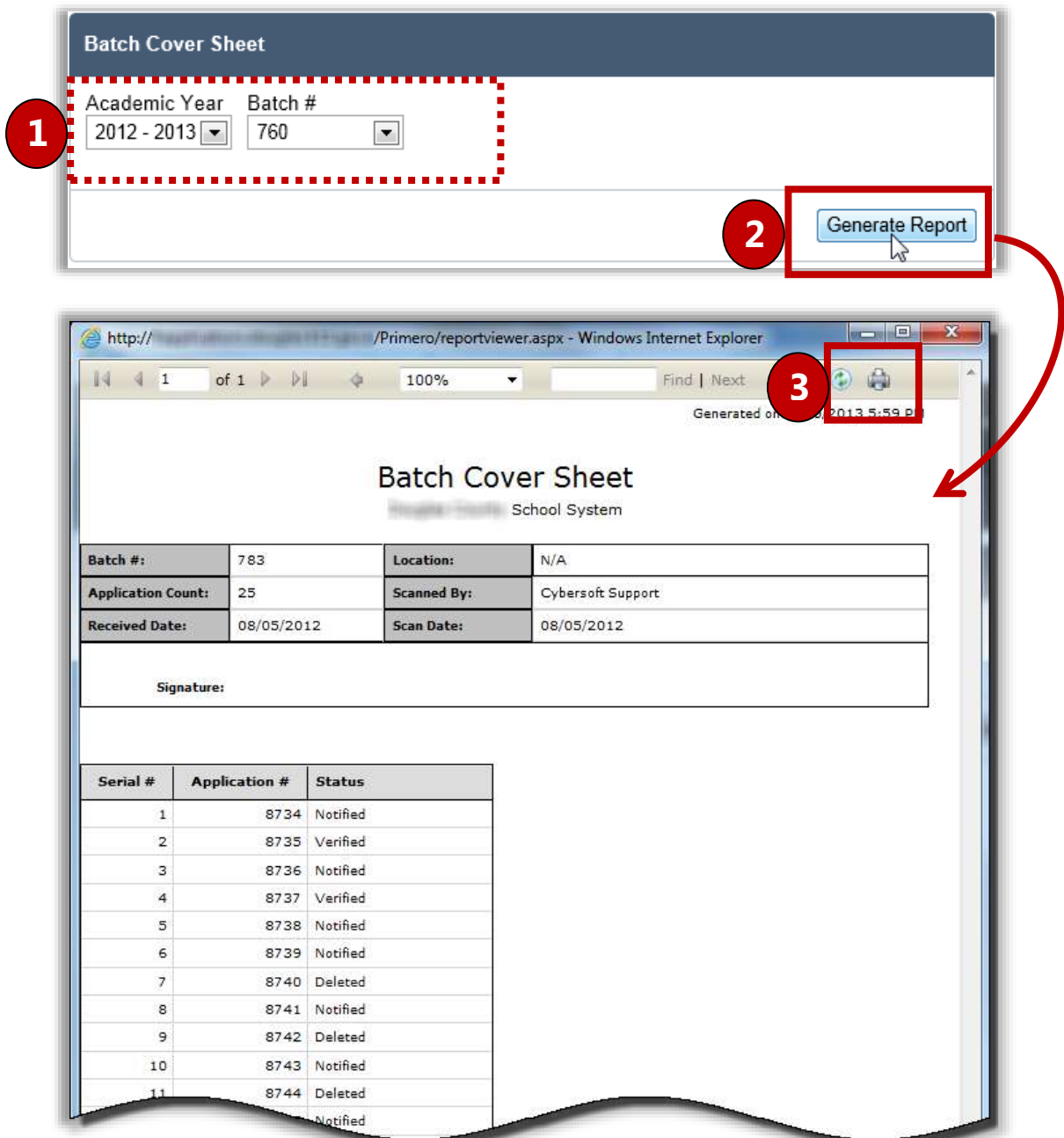


Page Functions

Button	Description
	Click to display a list of applications processed in the selected batch.

To generate and print a Batch Cover Sheet:

1. Select an Academic Year and a Batch #.
2. Click **Generate Report**.
3. Click **Print** () on the window toolbar.



1

Academic Year: 2012 - 2013
Batch #: 760

2 Generate Report

3

Generated on 08/05/2013 5:59 PM

Batch Cover Sheet

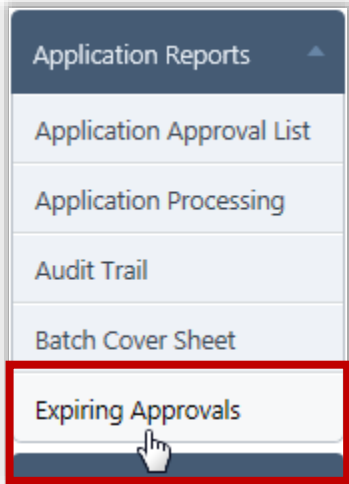
School System

Batch #:	783	Location:	N/A
Application Count:	25	Scanned By:	Cybersoft Support
Received Date:	08/05/2012	Scan Date:	08/05/2012

Signature:

Serial #	Application #	Status
1	8734	Notified
2	8735	Verified
3	8736	Notified
4	8737	Verified
5	8738	Notified
6	8739	Notified
7	8740	Deleted
8	8741	Notified
9	8742	Deleted
10	8743	Notified
11	8744	Deleted

Expiring Approvals

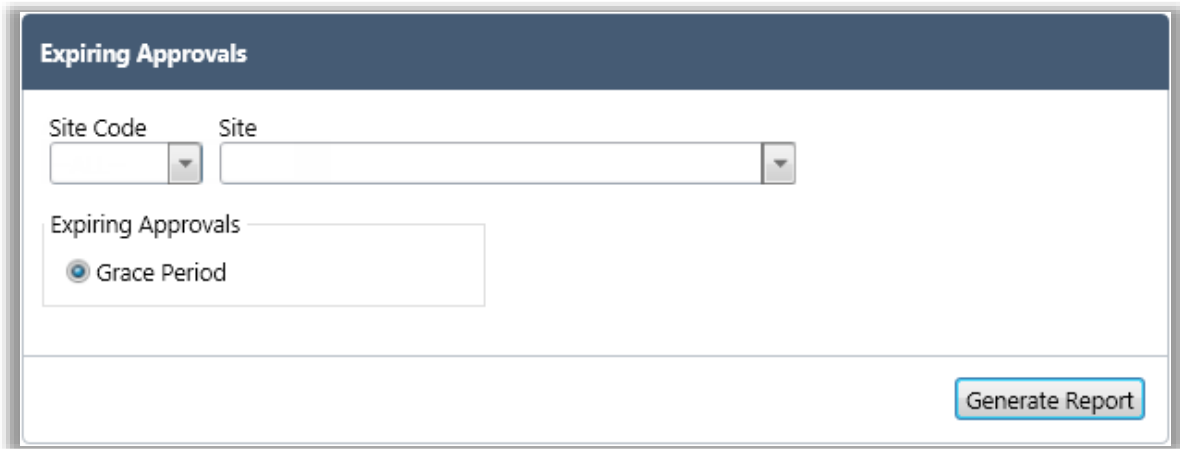


Expiring Approvals lists all students whose Grace Period expires before the end of the Academic Year.

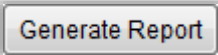
By default on the **Expiring Approvals** page:

- **Site / Site Code** are set to your site, or set to “ALL” if you have access to multiple sites.
- Expiring Approvals is set to “Grace Period”.


Expiring Approvals Page

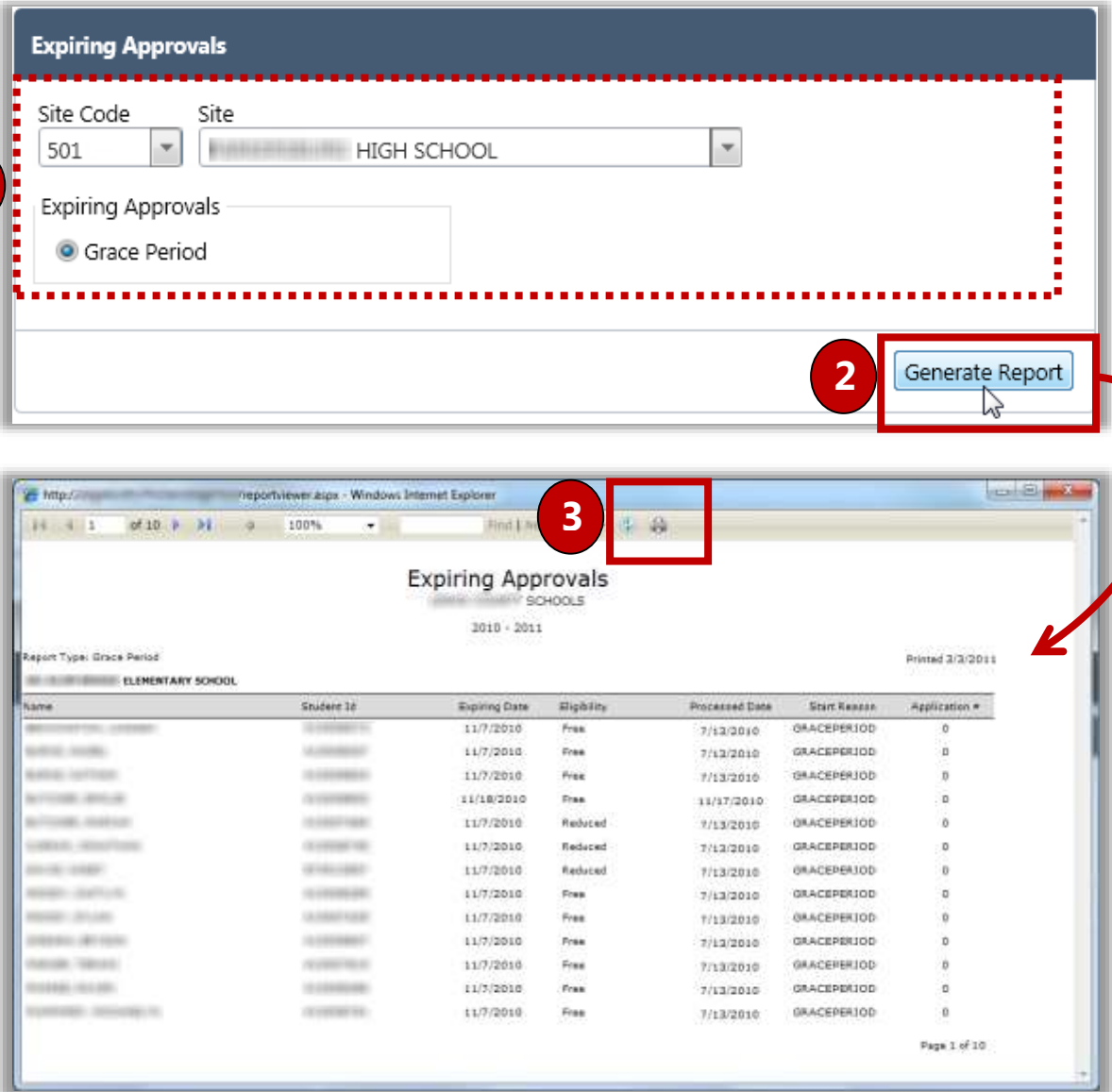


Page Functions

Button	Description
	Click to display a list of students that match the selected conditions.

To generate a list of students with expiring approvals:

1. In **Site Code** or **Site**, select a site code or name.
2. Click **Generate Report**.
3. Click **Print** () on the window toolbar.



Expiring Approvals

Site Code: 501 Site: HIGH SCHOOL

Expiring Approvals

Grace Period

Generate Report

Expiring Approvals
SCHOOLS
2010 - 2011

Report Type: Grace Period Printed 3/3/2011

ELEMENTARY SCHOOL

Name	Student ID	Expiring Date	Eligibility	Processed Date	Start Reason	Application #
...	...	11/7/2010	Free	7/13/2010	GRACEPERIOD	0
...	...	11/7/2010	Free	7/13/2010	GRACEPERIOD	0
...	...	11/7/2010	Free	7/13/2010	GRACEPERIOD	0
...	...	11/18/2010	Free	11/17/2010	GRACEPERIOD	0
...	...	11/7/2010	Reduced	7/13/2010	GRACEPERIOD	0
...	...	11/7/2010	Reduced	7/13/2010	GRACEPERIOD	0
...	...	11/7/2010	Free	7/13/2010	GRACEPERIOD	0
...	...	11/7/2010	Free	7/13/2010	GRACEPERIOD	0
...	...	11/7/2010	Free	7/13/2010	GRACEPERIOD	0
...	...	11/7/2010	Free	7/13/2010	GRACEPERIOD	0
...	...	11/7/2010	Free	7/13/2010	GRACEPERIOD	0
...	...	11/7/2010	Free	7/13/2010	GRACEPERIOD	0
...	...	11/7/2010	Free	7/13/2010	GRACEPERIOD	0
...	...	11/7/2010	Free	7/13/2010	GRACEPERIOD	0
...	...	11/7/2010	Free	7/13/2010	GRACEPERIOD	0

Page 1 of 10

<<End of Section>>

6

Eligibility Reports

In this section, you will learn how to generate and print the following reports:

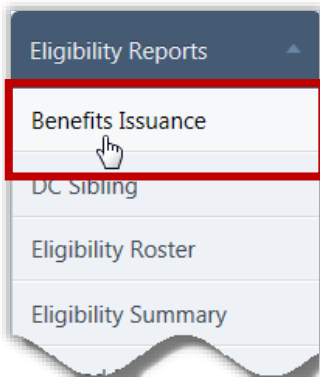
- ✓ Benefits Issuance
- ✓ DC Sibling
- ✓ Eligibility Roster
- ✓ Eligibility Summary
- ✓ Other Benefits
- ✓ Percent Economically Disadvantaged
- ✓ Student Activity
- ✓ Student Status Change

Eligibility Reports at a Glance

Menu Function	Description
Benefits Issuance	Details all eligibility determinations for a date or date range.
DC Sibling	Lists students that have been included in a Direct Certification import and a possible sibling match with another student.
Eligibility Roster	Lists students based on selected eligibility criteria.
Eligibility Summary	Lists the student count for each Eligibility category on a selected date.
Other Benefits	Add and manage other benefits provided by the district which are shown on the district's Online Applications website.
Percent Economically Disadvantaged	Lists the percentage of students identified as eligible for Free or Reduced Price meals in the total school population.
Student Activity	Lists all new students, students who have transferred or students who have withdrawn during a selected date range
Student Status Change	Lists all students whose eligibility changed within a selected date range.

- ★ Note: Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Eligibility Reports** menu, you may see a subset of the functions listed above or you may not have access to all of the features for each menu selection.

Benefits Issuance



Benefits Issuance details all 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.


By default on the **Benefits Issuance** page:

- Site / Site Code are set to your site, or set to “ALL” if you have access to multiple sites.
- Date Range is set to “Daily” with the current date selected.


Benefits Issuance Page

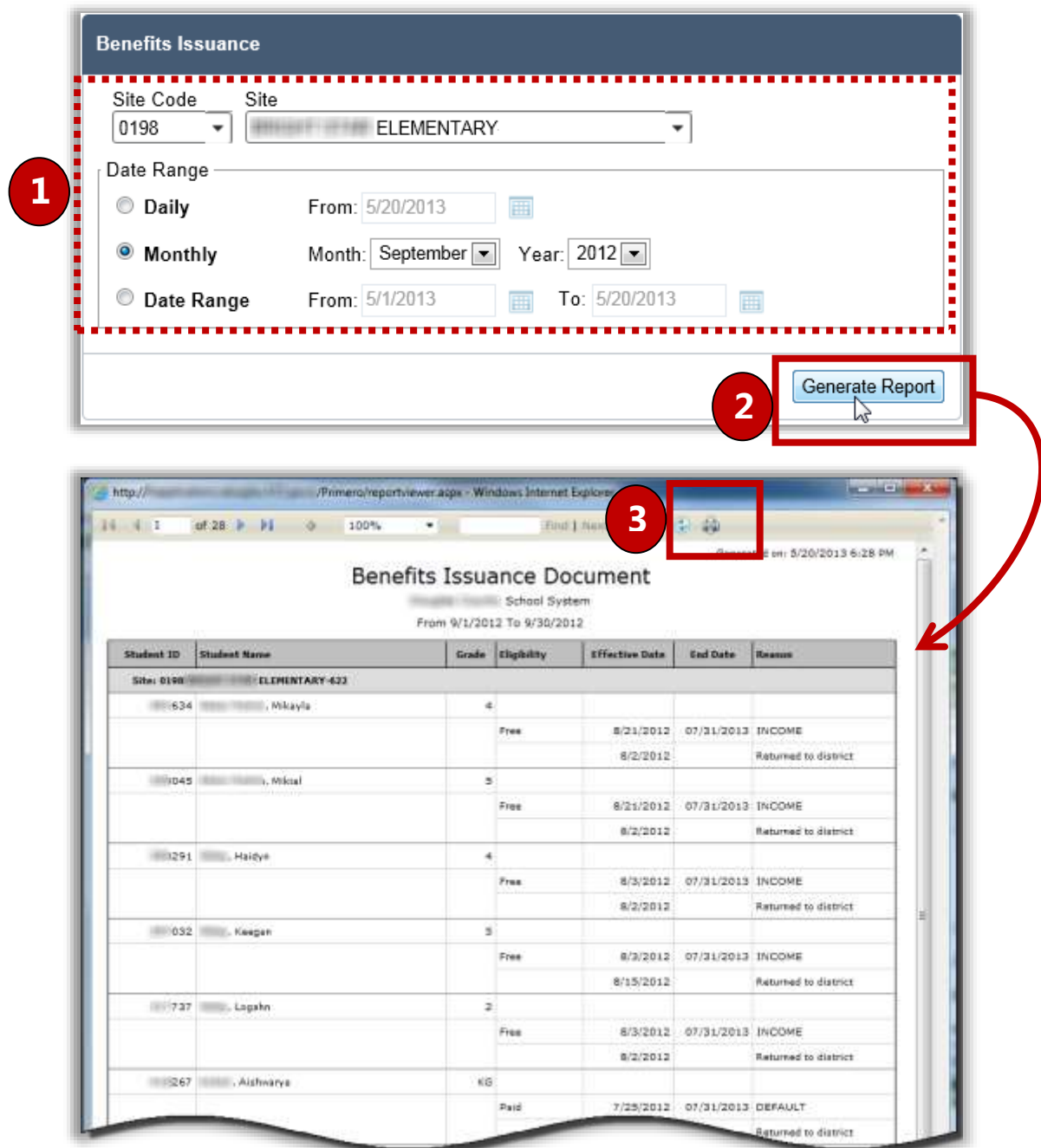
 A screenshot of the 'Benefits Issuance' page. At the top, there are two dropdown menus: 'Site Code' set to '-- ALL --' and 'Site' set to '-- ALL --'. Below these is a 'Date Range' section with three radio button options: 'Daily' (selected), 'Monthly', and 'Date Range'. The 'Daily' option has a 'From' date field set to '7/1/2011'. The 'Monthly' option has 'Month' set to 'July' and 'Year' set to '2011'. The 'Date Range' option has 'From' and 'To' date fields both set to '7/1/2011'. A 'Generate Report' button is located at the bottom right of the form.

Page Functions

Button	Description
	Click to display a list of students that match the selected conditions.

To generate and print a Benefits Issuance report:

1. Select a site in **Site Code** or **Site**, and select a date option in **Date Range**.
2. Click **Generate Report**.
3. Click **Print** () on the window toolbar.



1

Site Code: 0198 Site: ELEMNTARY-423

Date Range:

- Daily From: 5/20/2013
- Monthly Month: September Year: 2012
- Date Range From: 5/1/2013 To: 5/20/2013

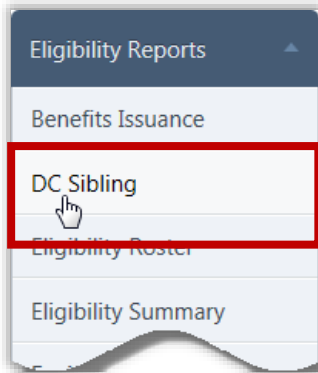
2 Generate Report

3

Benefits Issuance Document
School System
From 9/1/2012 To 9/30/2012

Student ID	Student Name	Grade	Eligibility	Effective Date	End Date	Reason
Site: 0198 ELEMNTARY-423						
000634	00000000, Mikayla	4	Free	8/21/2012	07/31/2013	INCOME
				8/2/2012		Returned to district
000045	00000000, Mikal	5	Free	8/21/2012	07/31/2013	INCOME
				8/2/2012		Returned to district
000291	00000000, Haidee	4	Free	8/3/2012	07/31/2013	INCOME
				8/2/2012		Returned to district
000032	00000000, Keegan	5	Free	8/3/2012	07/31/2013	INCOME
				8/15/2012		Returned to district
000737	00000000, Logan	2	Free	8/3/2012	07/31/2013	INCOME
				8/2/2012		Returned to district
000267	00000000, Aishwarya	KG	Paid	7/25/2012	07/31/2013	DEFAULT
						Returned to district

DC Sibling



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

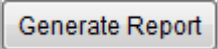
By default on the **DC Sibling** page:

- **Site / Site Code** are set to your site, or set to “ALL” if you have access to multiple sites.
- **Sorting** is set to “Alphabetical By District”.

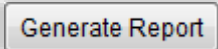

DC Sibling Page

 A screenshot of the "DC Sibling" page. At the top, there is a header "DC Sibling". Below it, there are two dropdown menus: "Site Code" and "Site". Underneath these is a "Sorting" section with two radio buttons: "Alphabetical By District" (which is selected) and "Alphabetical By Site". At the bottom right of the page, there is a blue button labeled "Generate Report".

Page Functions

Button	Description
	Click to display a list of students that match the selected conditions.

To generate and print a DC Sibling report:

1. Select a site in **Site Code** or **Site**, and select a sorting option.
2. Click  .
3. Click **Print** () on the window toolbar.

DC Sibling

Site Code: 0112 Site: ELEMENTARY

Sorting: Alphabetical By District Alphabetical By Site

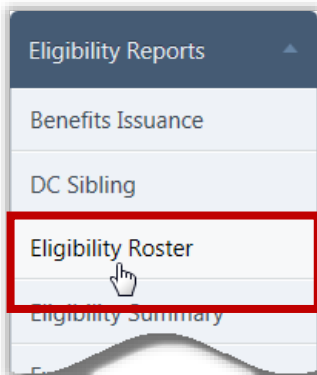
Generate Report

DC Sibling Matching

Sibling Student			Certified Student		
Student ID	Student Name	Certified Date	Student ID	Student Name	Certified Date
000224	LEWIS, Leona W	06/09/2012	000225	REAY, Riley A	06/09/2012
000014	SAPRINA, A	06/09/2012	000076	JUSTICE, Justice	07/26/2012
000044	CARLOS, Carlos A.	07/31/2012	000025	PELPE, Felpe	07/26/2012
000085	VICTORIA, Victoria G	06/09/2012	000041	JUSTICE, Justice J	07/26/2012
000208	JESSICA, Jessica L	07/27/2012	000022	CHRISTOPHER, Christopher L	07/26/2012
000082	JARREY, Jarrey A	06/18/2012	000029	DANNY, Danny A	07/26/2012
000021	ALISHA, Alisha J	07/27/2012	000001	ALEXIA, Alexia S	07/26/2012
000028	JUDY, Judy T	06/15/2012	000029	DANNY, Danny A	07/26/2012
000272	STRAN, Stran E	06/09/2012	000020	KATALYN, Katalyn R	07/26/2012
000271	MALLEN, Mallon G	06/09/2012	000090	MICHAEL, Michael C	07/26/2012
000250	JESSIE, Jessie A	06/18/2012	000029	DANNY, Danny A	07/26/2012

Page 1 of 1

Eligibility Roster



Eligibility Roster builds a list of students based on selected criteria.

By default on the **Eligibility Roster** page:

- **Area** is set to “ALL” if you have access to multiple Areas.
- **Site / Site Code** are set to your site, or set to “ALL” if you have access to multiple Sites.
- **Grade** is set to “ALL”.
- **As of Date** is set to the current date.
- All **Eligibility** options are selected.
- No **Display** or **Include** options are selected.
- All **Reason** options are selected.

Eligibility Roster Page

 A screenshot of the 'Eligibility Roster' page. At the top, there are dropdown menus for 'Area' (set to '--ALL--'), 'Site Code', 'Site', and 'Grade' (set to '--ALL--'). Below these is an 'As of Date' field with the value '6/24/2014'. The page is divided into several sections:


- Eligibility:** Contains three checked checkboxes: 'Free', 'Reduced', and 'Paid'.
- Reason:** Contains an 'Uncheck All' button and a grid of 15 checked checkboxes: 'Categorical', 'Even Start', 'Pre-Approval', 'CEP Transfer', 'Foster', 'Principal Approved', 'DC Foster', 'Grace Period', 'RCC', 'DC Medicaid', 'Head Start', 'Refused Benefits', 'DC SNAP', 'Homeless', 'Removed', 'Default', 'Import', 'Runaway', 'Denied', 'Income', 'Transfer', 'Direct Cert', 'Migrant', and 'Verification'.
- Display:** Contains several unchecked checkboxes: 'Show Eligibility Code Only', 'Show Application Information', 'Contact Info', 'Sort by Grade', 'Only Verification Sites', and 'Only Non-CEP Sites'.
- Include:** Contains two unchecked checkboxes: 'Inactive Students' and 'Inactive Sites'.

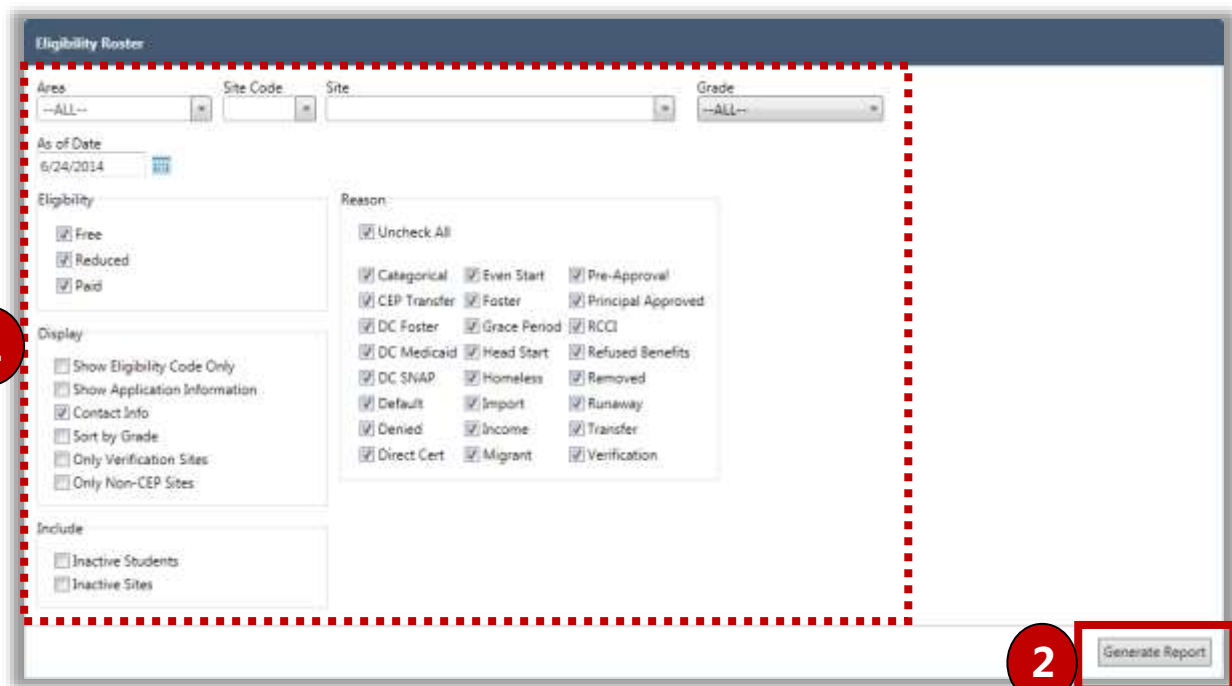
 A 'Generate Report' button is located in the bottom right corner of the page.

Page Functions

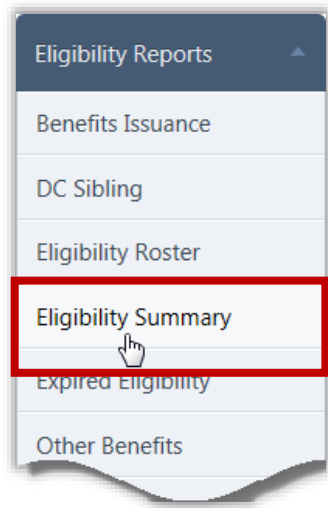
Button	Description
	Click to display a list of students that match the selected conditions.

To generate and print an Eligibility Roster report:

1. Select a site in **Site Code** or **Site**, and select one or more options, as needed.
2. Click **Generate Report**.
3. Click **Print** () on the window toolbar.



Eligibility Summary

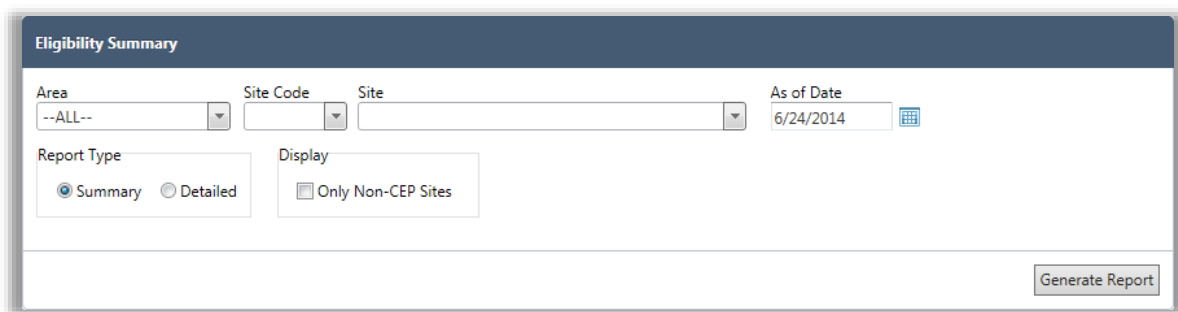


Eligibility Summary lists the count of students in each Eligibility category for the selected school(s) on a selected date. This report also offers a combined percent economically disadvantaged, the number of students who are DC, and the number of students that were denied.

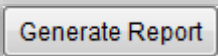
By default on the **Eligibility Summary** page:

- **Site / Site Code** are set to your site, or set to “**ALL**” if you have access to multiple sites.
- **As of Date** is set to the current date.
- **Report Type** is set to “Summary”.
- **Display: Only Non-CEP Sites** checkbox is cleared.


Eligibility Summary Page

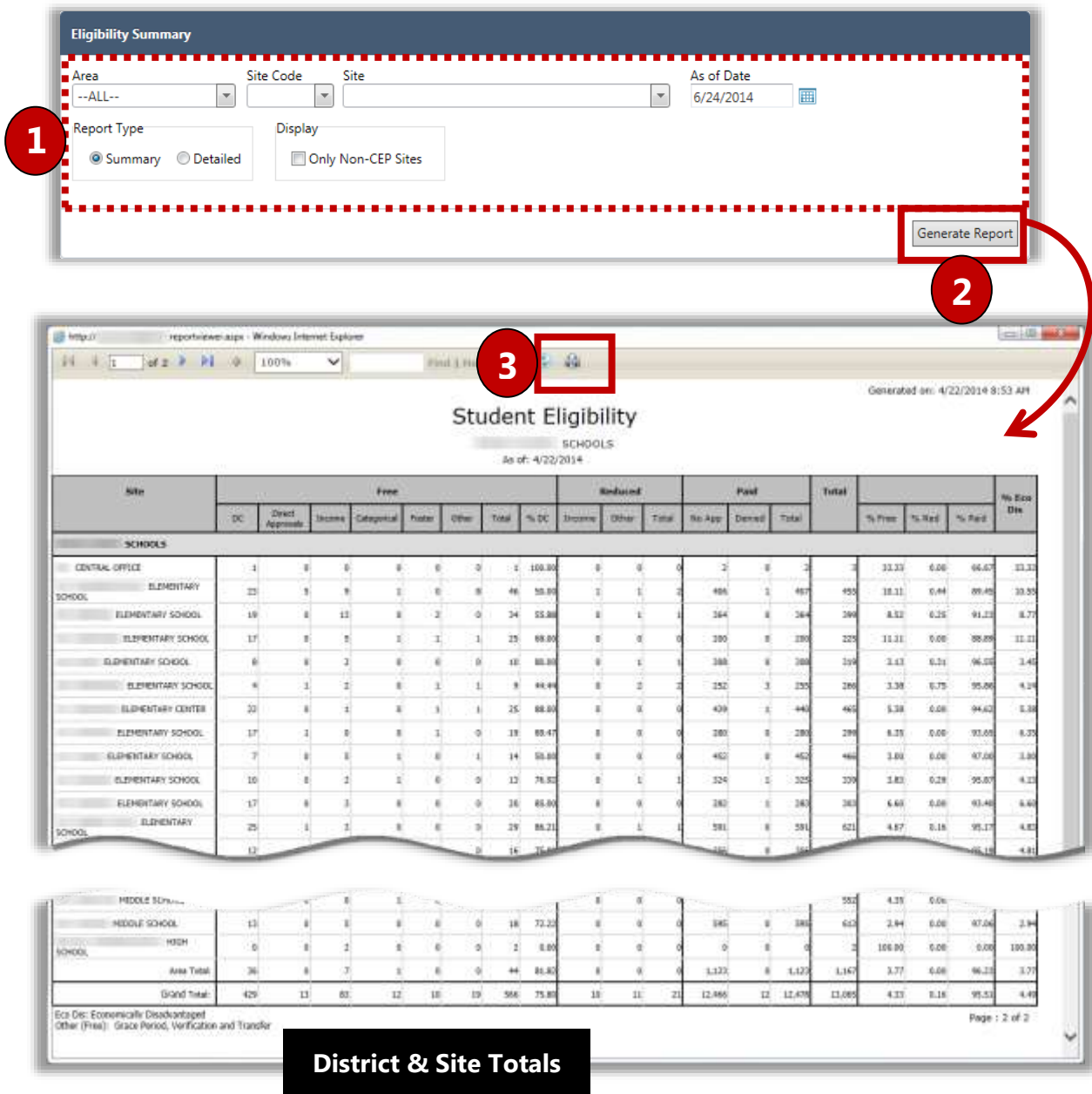


Page Functions

Button	Description
	Click to display eligibility information that matches the selected conditions.

To generate and print an Eligibility Summary report:

1. Select a site in **Site Code** or **Site**, select new **As of Date** and **Report Type** options, and select whether **Only Non-CEP Sites** should display, as needed.
2. Click **Generate Report**.
3. Click **Print** () on the window toolbar.



1

2

3

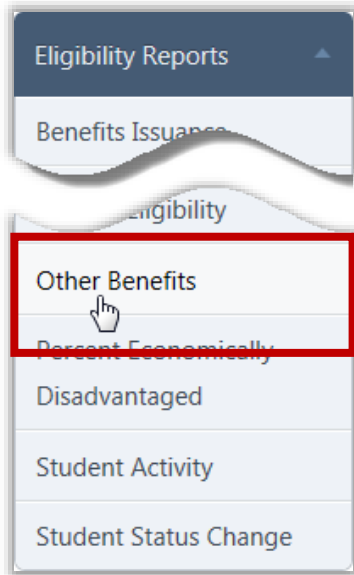
District & Site Totals

Site	Free							Reduced			Paid			Total	% Elig				
	DC	Direct Appellate	Income	Categorical	Header	Other	Total	% DC	Income	Other	Total	No App	Denial		Total	% Free	% Red	% Paid	
SCHOOLS																			
CENTRAL OFFICE	4	0	0	0	0	0	4	100.00	0	0	0	2	0	2	2	33.33	0.00	66.67	33.33
SCHOOL	23	9	9	1	0	0	46	55.80	1	1	2	484	1	487	495	18.11	0.44	89.45	30.55
ELEMENTARY SCHOOL	19	8	11	0	2	0	34	55.80	0	1	1	364	0	364	269	8.52	0.25	91.23	8.77
ELEMENTARY SCHOOL	17	0	0	1	1	1	20	88.00	0	0	0	200	0	200	225	11.11	0.00	88.89	11.11
ELEMENTARY SCHOOL	0	0	2	0	0	0	10	80.00	0	1	1	388	0	388	319	3.43	0.21	96.37	3.43
ELEMENTARY SCHOOL	0	1	1	0	1	1	3	44.44	0	2	2	252	3	255	260	3.38	0.75	95.86	4.14
ELEMENTARY CENTER	20	0	1	0	1	1	25	88.00	0	0	0	409	1	410	465	5.38	0.00	94.62	5.38
ELEMENTARY SCHOOL	17	1	0	0	1	0	19	88.47	0	0	0	280	0	280	289	8.33	0.00	93.00	8.33
ELEMENTARY SCHOOL	7	0	0	0	0	1	8	59.80	0	0	0	452	0	452	460	3.80	0.00	97.00	3.80
ELEMENTARY SCHOOL	10	0	1	2	0	0	13	78.52	0	1	1	324	1	325	339	2.83	0.28	95.87	4.13
ELEMENTARY SCHOOL	17	0	1	0	0	0	18	85.00	0	0	0	282	1	283	302	4.60	0.00	93.40	4.60
SCHOOL	25	1	1	0	0	0	29	88.21	0	1	1	591	0	591	621	4.87	0.18	95.17	4.83
SCHOOL	13	0	0	0	0	0	13	75.80	0	0	0	300	0	300	310	3.23	0.00	96.77	3.23
MIDDLE SCHOOLS																			
MIDDLE SCHOOL	13	0	0	0	0	0	13	72.22	0	0	0	595	0	595	612	2.94	0.00	97.06	2.94
SCHOOL	0	0	1	0	0	0	1	8.00	0	0	0	0	0	0	2	100.00	0.00	0.00	100.00
Area Total	36	0	7	1	0	0	44	85.82	0	0	0	1,122	0	1,122	1,147	3.77	0.00	96.23	3.77
District Total:	429	13	83	12	10	19	566	75.80	10	11	21	12,466	12	12,478	13,085	4.33	0.18	95.53	4.49

ECI Dis: Economically Disadvantaged
Other (Free): Grace Period, Verification and Transfer

Page : 2 of 2

Other Benefits



Other Benefits lists all students who requested more information regarding benefits offered by their district.

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.

By default, on the **Other Benefits** page:

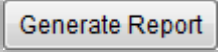
- **Area** is set to your area or set to “**ALL**” if you have access to multiple areas.
- **Site/Site Code** are set to your site or is blank if you have access to multiple sites.
- **Academic Year** is set to the current date.
- **Benefits** is set to “**ALL**”.
- **Include Guardian Info** is cleared.

Other Benefits Page


The screenshot shows the 'Other Benefits' report generation interface. It includes the following fields and controls:

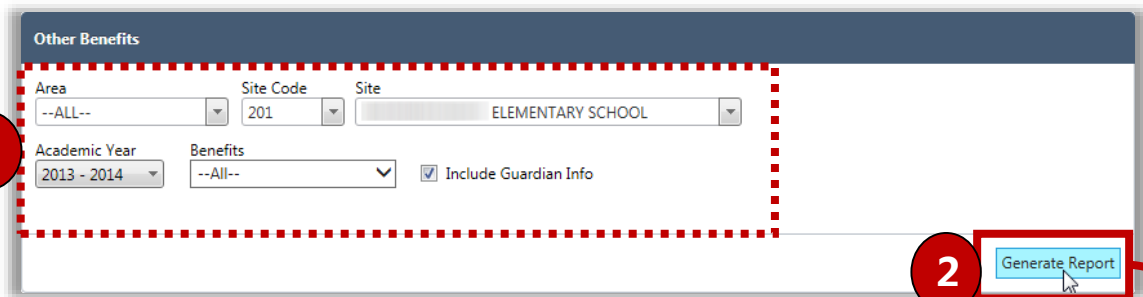
- Area:** A dropdown menu currently set to "--ALL--".
- Site Code:** A dropdown menu.
- Site:** A text input field with a dropdown arrow.
- Academic Year:** A dropdown menu currently set to "2013 - 2014".
- Benefits:** A dropdown menu currently set to "--All--".
- Include Guardian Info:** An unchecked checkbox.
- Generate Report:** A button located at the bottom right of the form.

Page Functions

Button	Description
	Click to display all students with other benefits for the selected conditions.

To generate and print an Other Benefits report:

1. Select search criteria as needed.
2. Click **Generate Report**.
3. Click **Print** () on the window toolbar.

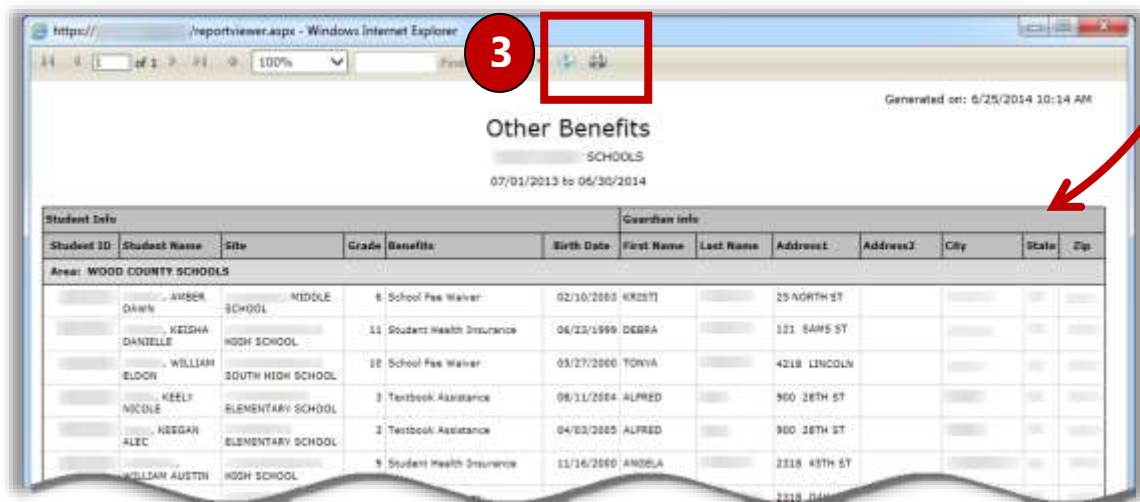


Other Benefits

Area: --ALL-- Site Code: 201 Site: ELEMENTARY SCHOOL

Academic Year: 2013 - 2014 Benefits: --All-- Include Guardian Info

2 Generate Report

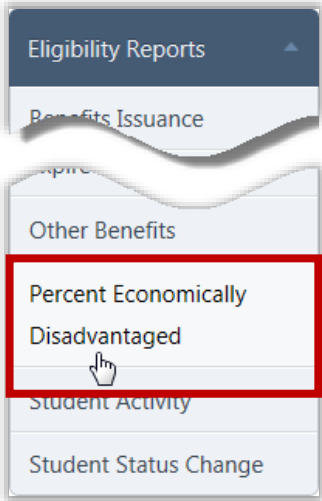


Generated on: 6/25/2014 10:14 AM

Other Benefits
SCHOOLS
07/01/2013 to 06/30/2014

Student Info						Guardian Info						
Student ID	Student Name	Site	Grade	Benefits	Birth Date	First Name	Last Name	Address	Address2	City	State	Zip
Area: WOOD COUNTY SCHOOLS												
	AMBER	SCHOOL	MIDDLE	6 School Fee Waiver	02/10/2003	KRISTI		25 NORTH ST				
	KEISHA	HIGH SCHOOL		11 Student Health Insurance	04/23/1999	DEBRA		121 SAMS ST				
	WILLIAM	SOUTH HIGH SCHOOL	10	School Fee Waiver	03/27/2000	TONYA		4218 LINCOLN				
	KEELY	ELEMENTARY SCHOOL	3	Textbook Assistance	08/11/2004	ALFRED		900 28TH ST				
	NICOLE	ELEMENTARY SCHOOL	3	Textbook Assistance	04/03/2005	ALFRED		900 28TH ST				
	NISGAR	ELEMENTARY SCHOOL	3	Textbook Assistance	04/03/2005	ALFRED		900 28TH ST				
	ALICIA	HIGH SCHOOL	9	Student Health Insurance	11/16/2000	ANGELA		2318 43TH ST				
	WILLIAM AUSTIN	HIGH SCHOOL	9	Student Health Insurance	11/16/2000	ANGELA		2318 43TH ST				

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.

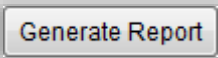
By default on the **Batch Sheet** page:

- **Area** is set to your area, or set to “**ALL**” if you have access to multiple areas.
- **Site / Site Code** are blank.
- **As of Date** is set to the current date.

Percent Economically Disadvantaged Page


The screenshot shows a web form titled 'Percent Economically Disadvantaged'. It contains three dropdown menus: 'Area' (set to '--ALL--'), 'Site Code', and 'Site'. Below these is an 'As of Date' field with a calendar icon, showing the date '3/28/2014'. A 'Generate Report' button is located in the bottom right corner of the form area.

Page Functions

Button	Description
	Click to display eligibility information that matches the selected conditions.

To generate and print a Percent Economically Disadvantaged report:

On the **Percent Economically Disadvantaged** page:

1. Select a site in **Site Code** or **Site**, and select new **Date** and **Report Type** options, as needed.
2. Click **Generate Report**.
3. Click **Print** () on the window toolbar.



Generated on 3/28/2014 3:55 PM

Percent Economically Disadvantaged

As of 3/28/2014

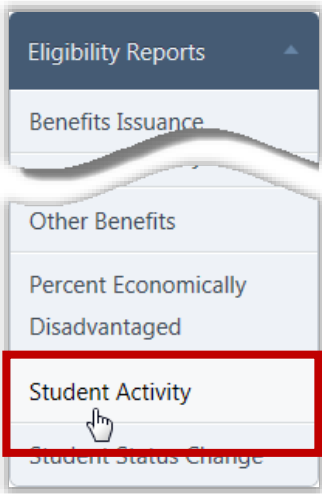
Site	Enrollment	Free	Reduced	Total F/R	Total F/R %
SFA: WOOD COUNTY SCHOOLS					
ELEMENTARY SCHOOL	445	35	2	37	8.31
MIDDLE SCHOOL	519	12	0	12	2.31
	3	0	0	0	0.00
MIDDLE SCHOOL	671	11	2	13	1.94
ELEMENTARY SCHOOL	386	21	1	22	5.70
MENTARY SCHOOL			0		4.29

	1			1	
MIDDLE SCHOOL	532	4	0	4	0.75
MIDDLE SCHOOL	601	6	0	6	1.00
Area Total:	1,134	11	0	11	0.97
Grand Total	12,721	209	21	230	1.81

Page: 1 of 1

District & Site Totals

Student Activity

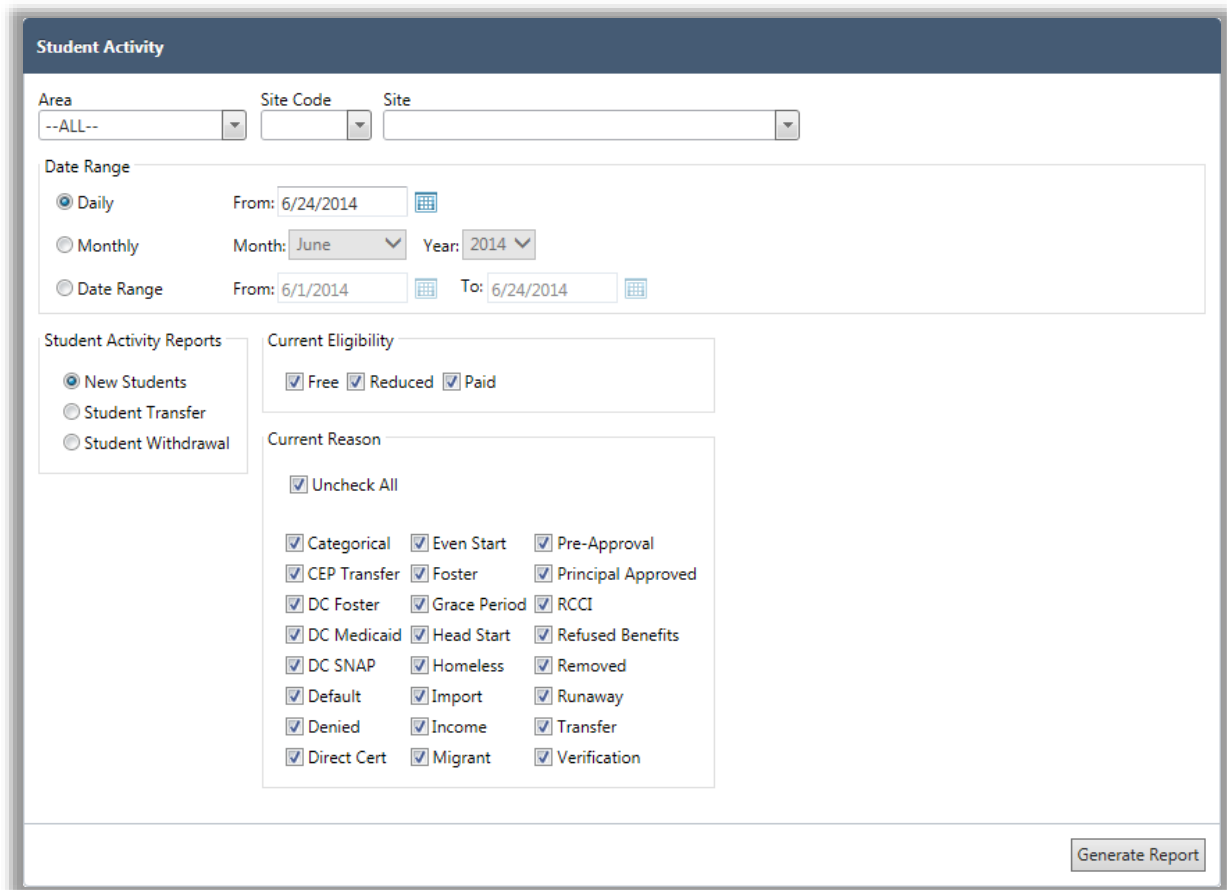


Student Activity lists all new students, students who have transferred or students who have withdrawn during a selected date range.

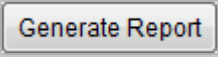
By default on the **Student Activity** page:

- **Site / Site Code** are set to your site, or set to “**ALL**” if you have access to multiple sites.
- **Date Range** is set to “**Daily**” with the current date selected.
- Student Activity Reports is set to “New Students”.
- **Current Eligibility** has all options enabled (checkmark added).
- **Current Reason** has all reasons enabled (checkmarks added).

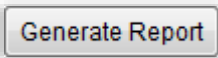

Student Activity Page

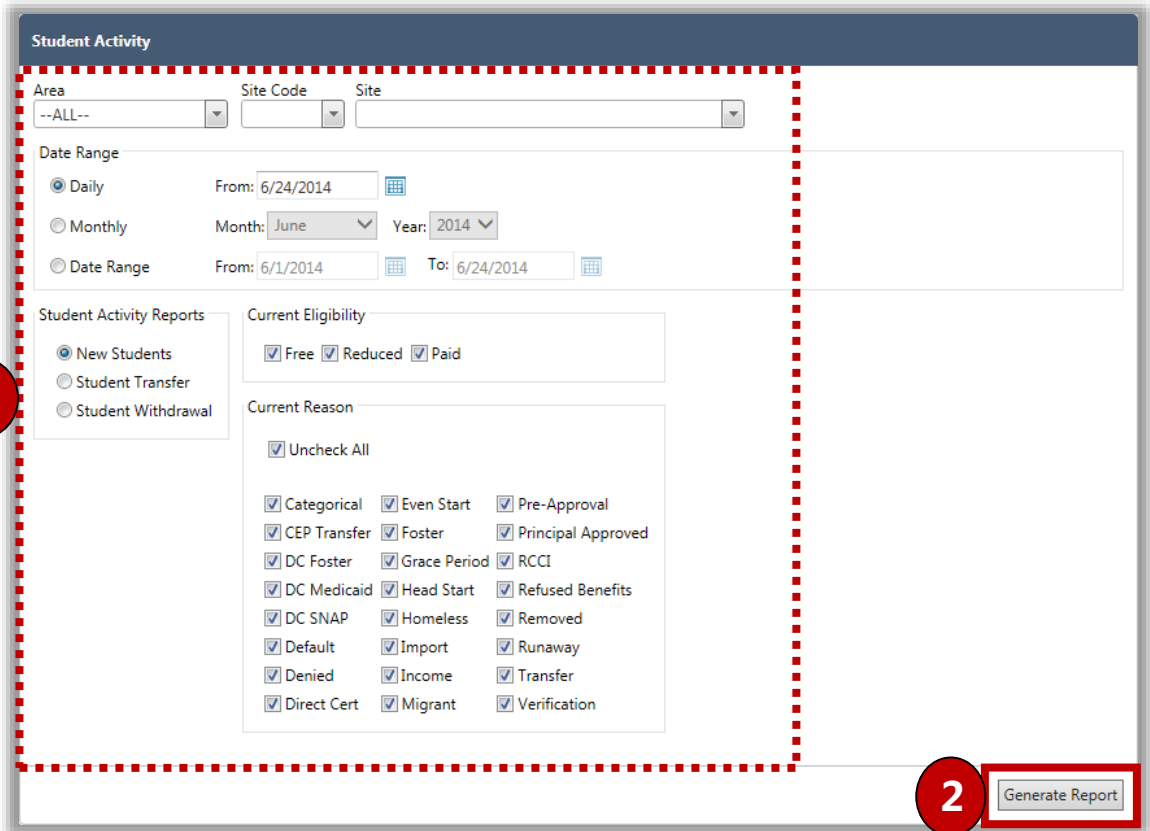


Page Functions

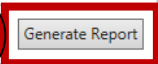
Button	Description
	Click to display a list of students that match the selected conditions.

To generate and print a Student Activity report

1. Select a site in **Site Code** or **Site**, and select new **Date** and **Report Type** options, as needed.
2. Click  .
3. Click **Print** () on the window toolbar.



1

2 

Generated on: 5/21/2013 5:41 PM

Student Withdrawal

School System
1/1/2013 To 1/31/2013

Student ID	Student Name	Grade	Application #	Current Eligibility	Current Reason	Withdrawal Date	Return Date
Site: [redacted]							
215	Mason	4	0	Paid	Default	01/08/2013	
409	Dawson	4	0	Paid	Default	01/08/2013	
148	Matthew	5	0	Free	Direct Cert	01/08/2013	
936	Kayla	5	0	Paid	Default	01/08/2013	
410	Nicholas S	5	0	Paid	Default	01/23/2013	
	Skyler D						
083		10				01/11/2013	
647	Derrick	12	0	Paid	Default	01/23/2013	
Site: [redacted] HIGH							
199	Kamryn R		0	Free	Direct Cert	01/08/2013	01/15/2013
103	Tequila S			Paid	Default	01/31/2013	02/06/2013
092	Luis A		0	Free	Direct Cert	01/08/2013	01/10/2013
947	Brandon A		0	Free	Direct Cert	01/31/2013	
618	Kevin L		0	Paid	Default	01/18/2013	01/26/2013
573	Adam W	9	0	Paid	Default	01/25/2013	
916	Rashaan	9	0	Free	Direct Cert	01/14/2013	
	berland L	9	9272	Free		01/08/2013	
		9					

Generated on: 5/21/2013 5:43 PM

Student Withdrawal

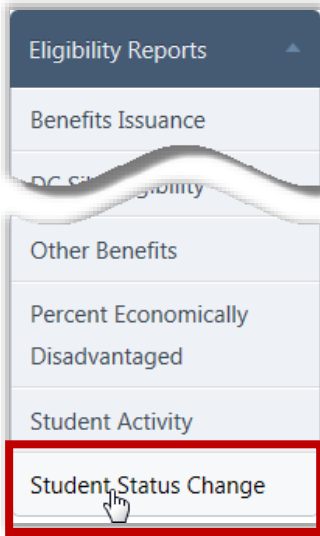
School System
1/1/2013 To 1/31/2013

Current Eligibility	Count	Current Reason	Count
Free	399	Categorical	42
Reduced	35	DC Foster	0
Paid	121	DC SNAP	0
Total:	555	Default	111
		Denied	9
		Direct Cert	258
		Even Start	0
		Foster	11
		Grace Period	0
		Runaway	0
		Transfer	0
		Verification	1
		Total:	555

Page: 13 of 13

Eligibility & Reason Totals

Student Status Change



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.

By default on the **Student Status Change** page:

- **Site / Site Code** are set to your site, or set to “**ALL**” if you have access to multiple sites.
- **Date Range** is set to “**Daily**” with the current date selected.

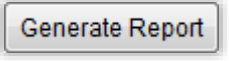

Student Status Change Page

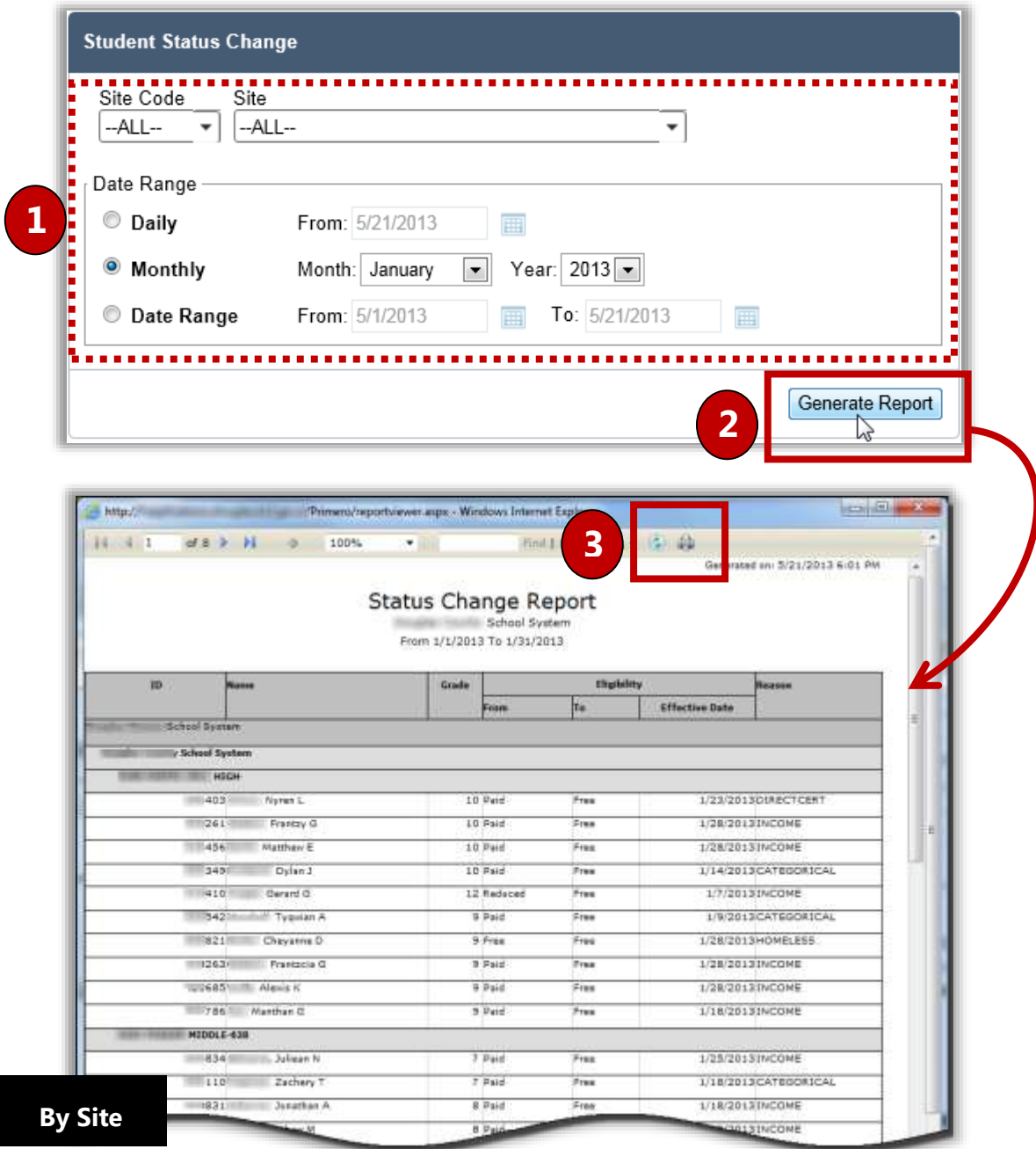
The screenshot shows the 'Student Status Change' page interface. At the top, there are two dropdown menus for 'Site Code' and 'Site', both currently set to '--ALL--'. Below these is a 'Date Range' section with three radio button options: 'Daily' (which is selected), 'Monthly', and 'Date Range'. The 'Daily' option has a 'From' date field set to '5/21/2013' with a calendar icon. The 'Monthly' option has 'Month' set to 'May' and 'Year' set to '2013'. The 'Date Range' option has 'From' set to '5/1/2013' and 'To' set to '5/21/2013', both with calendar icons. A 'Generate Report' button is located at the bottom right of the form area.

Page Functions

Button	Description
	Click to display a list of students that match the selected conditions.

To generate and print a Student Status Change report

1. Select a site in **Site Code** or **Site**, and select a new **Date Range**, as needed.
2. Click .
3. Click **Print** () on the window toolbar.



1

Site Code: --ALL-- Site: --ALL--

Date Range:

- Daily From: 5/21/2013
- Monthly Month: January Year: 2013
- Date Range From: 5/1/2013 To: 5/21/2013

2 Generate Report

3

Generated on: 5/21/2013 6:01 PM

Status Change Report

School System
From 1/1/2013 To 1/31/2013

ID	Name	Grade	Eligibility		Reason
			From	To	
HIGH					
403	Ryren L	10 Paid	Free	1/23/2013	DIRECT CERT
261	Freddy G	10 Paid	Free	1/28/2013	INCOME
456	Matthew E	10 Paid	Free	1/28/2013	INCOME
349	Dylan J	10 Paid	Free	1/14/2013	CATEGORICAL
410	Gerard G	12 Redacted	Free	1/7/2013	INCOME
342	Tyquan A	9 Paid	Free	1/9/2013	CATEGORICAL
821	Cheyenne D	9 Free	Free	1/28/2013	HOMELESS
1263	Frederica G	9 Paid	Free	1/28/2013	INCOME
12685	Alexis K	9 Paid	Free	1/28/2013	INCOME
786	Maethan C	9 Paid	Free	1/18/2013	INCOME
MIDDLE-638					
834	Julian N	7 Paid	Free	1/23/2013	INCOME
110	Zachery T	7 Paid	Free	1/18/2013	CATEGORICAL
821	Jonathan A	8 Paid	Free	1/18/2013	INCOME
		8 Paid	Free	1/18/2013	INCOME

By Site

7

Verification

In this section 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.

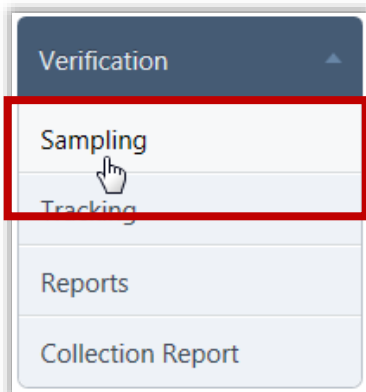
Verification at a Glance

Menu Function	Description
Sampling	Generate a sample of applications for the verification process.
Tracking	Update application information as it is received from households; complete the verification process when all information is collected.
Reports	Generate and print one of six reports that provide application information to help support the Verification process.
Collection Report	Generate and print the Collection Report, which summarizes verification data.

 **Note:**

Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Verification** menu, you may see a subset of the functions listed above or you may not have access to all of the features for each menu selection.

Sampling



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

This “first step” in the Verification process is generally completed on or after October 1st, the deadline established by the USDA. If you choose to generate the sample on October 1st, 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 processed on or before October 1st are accurately considered for Verification. If you choose to generate the sample after October 1st, PrimeroEdge will only consider those applications processed on or before October 1st for sampling purposes.

Sampling Page

 A screenshot of the "Sampling" page in a web application. At the top, there is a dropdown menu for "Area" with "Area 1" selected and an "Apply" button below it. Below this is a table titled "Verification Samples" with columns: Academic Year, Sample Method, Number of Applications, Count, Sample Complete, Sample Date, Generated On, and Generated By. The table contains one row of data. Below the table is a text block providing instructions on when to generate a sample. To the right is a "Sampling Methods" section with radio buttons for "Standard (formerly Error Prone)", "Alternate One (formerly Random)", and "Alternate Two (formerly Focused)", and a "Generate Sample" button.

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	9/3/2013 9:29 AM	Cybersoft Support

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).

Setting Areas for Verification

Most districts include all schools in the district in one Verification process. However, some districts must use separate verification processes for groups of schools, such as charter schools or residential child care institutions. This scenario requires a couple of simple modifications.

First, “areas” must be established in your district. An area will include one or more schools. Areas are set up in the **[System]** module through the **Sites and Users > Regions** menu selection.

An area:

- Can have any name and description as needed.
- **Organization Level** must be set to “Area”.
- **Parent Region** must be set to the school district.

PrimerEdge - Add/Edit Region

Region Name: Area 1

Region Description: Northeast

Organization Level: Area

Parent Region: SCHOOLS

ParentOnline enabled

Update Region

Second, each school in an area must be set to that area in **[System] > Site and Users > Sites** in **Region** on the **General Info** tab. When this is complete, each page in the Verification menu selections displays an **Area** field where you will select the area to work with. If you do not set up areas, the **Area** field is not shown on the Compliance pages.

Sites

[Back to Sites](#)

General Info Configuration

General Info

Site Name: Elementary School

Site Description: Elementary School

Site Code:

Region: ...Area 1

Site Type: Elementary School

Site Status: Active Inactive

Correspondence Address

Address: 73... Avenue

To generate a Verification Sampling Pool

1. Choose an **Area** and click
2. Choose a method, if needed.
3. Click

★ Notes You must have approval from your State Agency to use an Alternate Sampling Method.

1

2

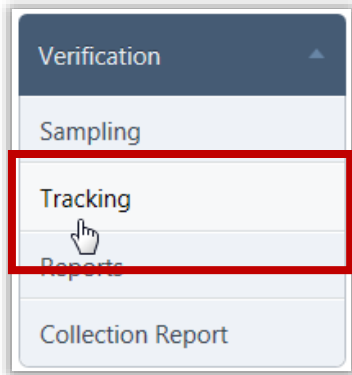
3

Sample generated successfully!

2

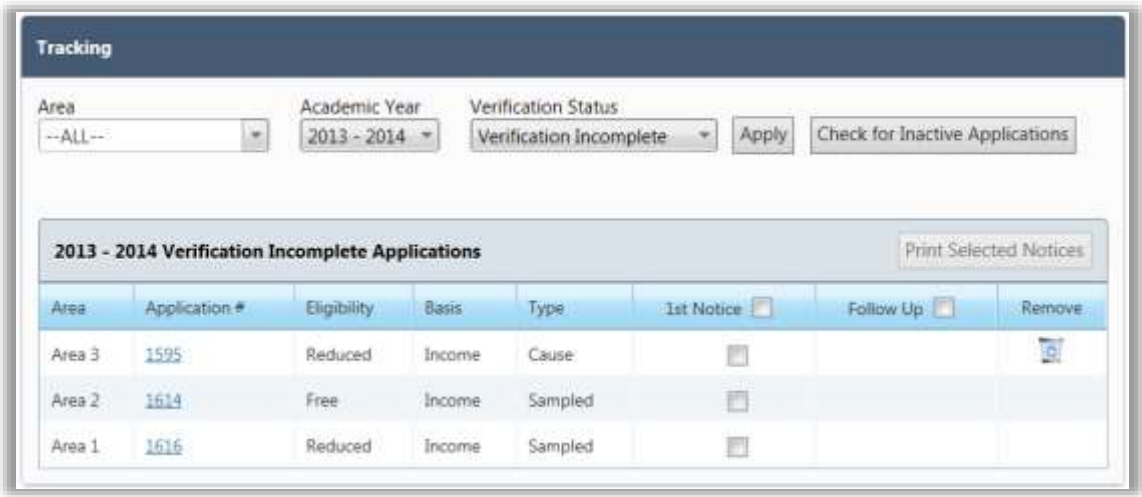
3

Tracking



Tracking generates notifications (First, Subsequent and Adverse Action) and updates the sampled applications. After generating the Verification sample, the next step in the Verification process is to send the selected households Notification.



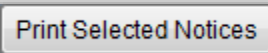
Tracking Page



By default on the **Tracking** page:

- **Area** is set to “ALL” if the user has access to multiple areas.
- **Academic Year** is set to the current year.
- **Verification Status** is set to “Verification Incomplete”.

Page Functions

Button	Description
	Click to display a list of applications that match the selected conditions.
	Click to unselect all applications that are marked inactive.
	Click to print letters for the selected applications.

Verification Status Selections

Selections	Description
Verification Incomplete	Application selected but response not received
No Response	Application selected, notified and past the “response due days” with no response from household.
Deselected	Application no longer has <i>active</i> students (students withdrew)
Verification Complete	Application selected, notified and the Verification process for the application is complete

Unselecting Inactive Applications

To unselect inactive applications

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

Tracking

Area: --ALL-- Academic Year: 2013 - 2014 Verification Status: Verification Incomplete Apply **Check for Inactive Applications**

2013 - 2014 Verification Incomplete Applications Print Selected Notices

Area	Application #	Eligibility	Basis	Type	1st Notice <input type="checkbox"/>	Follow Up <input type="checkbox"/>	Remove
Area 3	1595	Reduced	Income	Cause	<input type="checkbox"/>		
Area 2	1614	Free	Income	Sampled	<input type="checkbox"/>		
Area 1	1616	Reduced	Income	Sampled	<input type="checkbox"/>		

Any inactive applications have been deselected.

Tracking

Area: --ALL-- Academic Year: 2013 - 2014 Verification Status: Verification Incomplete Apply **Check for Inactive Applications**


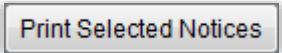
2013 - 2014 Verification Incomplete Applications Print Selected Notices

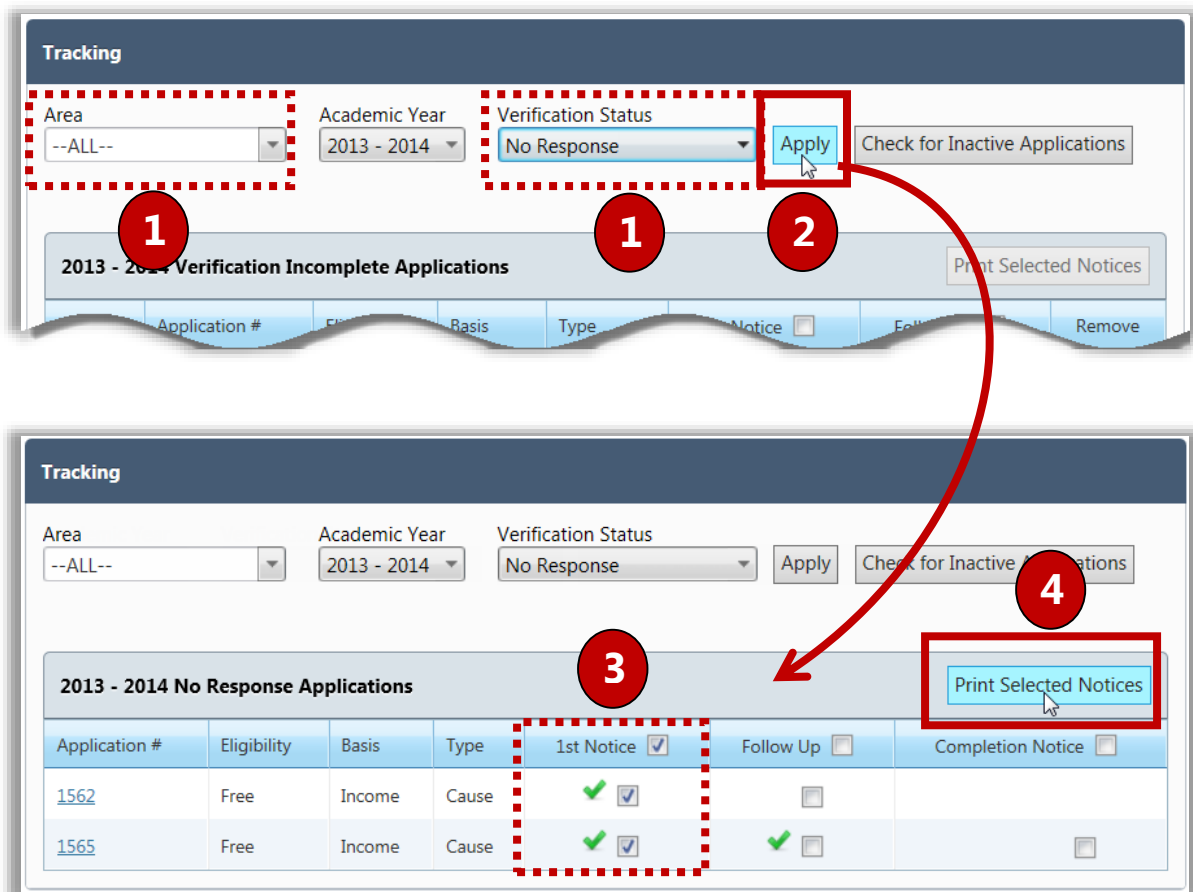
Area	Application #	Eligibility	Basis	Type	1st Notice <input type="checkbox"/>	Follow Up <input type="checkbox"/>	Remove
Area 3	1595	Reduced	Income	Cause	<input type="checkbox"/>		

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 First Notice Letters

1. Select an **Area**, if needed, and select “No Response” in **Verification Status**.
2. Click .
3. Either select in the **1st Notice** column header to print letters for All applications, or select individual application listings (add check mark).
4. Click .



The first screenshot shows the Tracking page with the following filters: Area: --ALL--, Academic Year: 2013 - 2014, Verification Status: No Response. The Apply button is highlighted with a red circle and a red arrow pointing to the second screenshot. The table below the filters is titled "2013 - 2014 Verification Incomplete Applications".

The second screenshot shows the Tracking page with the following filters: Area: --ALL--, Academic Year: 2013 - 2014, Verification Status: No Response. The Print Selected Notices button is highlighted with a red circle and a red arrow pointing to the first screenshot. The table below the filters is titled "2013 - 2014 No Response Applications". The 1st Notice column header is checked, and the 1st Notice column for the two applications (1562 and 1565) has green check marks.


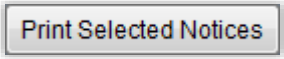
Application #	Eligibility	Basis	Type	1st Notice	Follow Up	Completion Notice
1562	Free	Income	Cause	✓ <input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1565	Free	Income	Cause	✓ <input checked="" type="checkbox"/>	✓ <input type="checkbox"/>	<input type="checkbox"/>

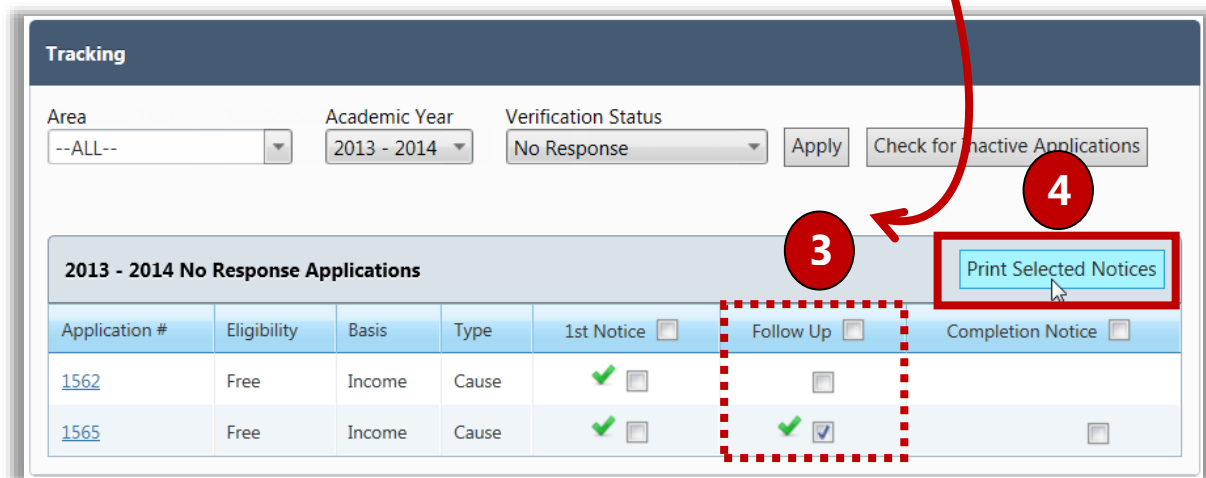
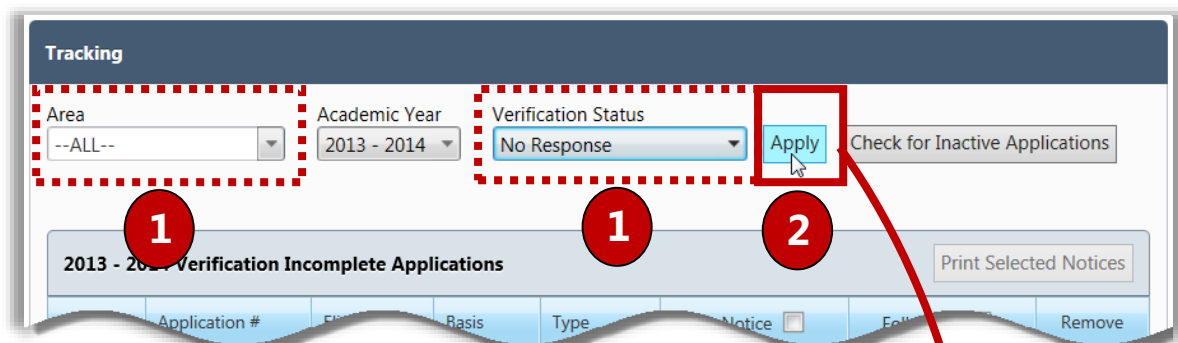
A success message appears above the **Tracking** page when letters have been printed. The green check mark indicates that the verification letter has been printed for that application.

Sending Follow-Up Letters

At the time the Follow-Up Letter 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 Letters

1. Select an **Area**, if needed, and select “No Response” in **Verification Status**.
2. Click  .
3. Select **Follow Up** in the column header or select individual applications.
4. Click  .



Applications are again listed as “Verification Incomplete” (instead of “No Response”). Notice the individual green check marks indicating that the letter has been printed.

Sending Adverse Action Notification

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

To print Adverse Action notices

1. Select a year in **Academic Year** and select "No Response" in **Verification Status**.
2. Click .
3. Select in the **Completion Notice** column header or select individual application (add check mark).
4. Click .

The screenshots illustrate the process of sending an Adverse Action Notification. The first screenshot shows the 'Tracking' interface with filters for 'Area' (set to --ALL--), 'Academic Year' (2013 - 2014), and 'Verification Status' (No Response). The 'Apply' button is highlighted with a red box and a red circle labeled '2'. A red dashed box highlights the filter area, with a red circle labeled '1' pointing to the 'Academic Year' dropdown. Below the filters, a table titled '2013 - 2014 Verification Incomplete Applications' is visible, with a 'Print Selected Notices' button to its right.



The second screenshot shows the 'Tracking' interface after the filters are applied. The table is now titled '2013 - 2014 No Response Applications'. The 'Completion Notice' checkbox in the table header is checked, highlighted with a red box and a red circle labeled '3'. The 'Print Selected Notices' button is also highlighted with a red box and a red circle labeled '4'. A red arrow points from the 'Apply' button in the first screenshot to the 'Print Selected Notices' button in the second screenshot.

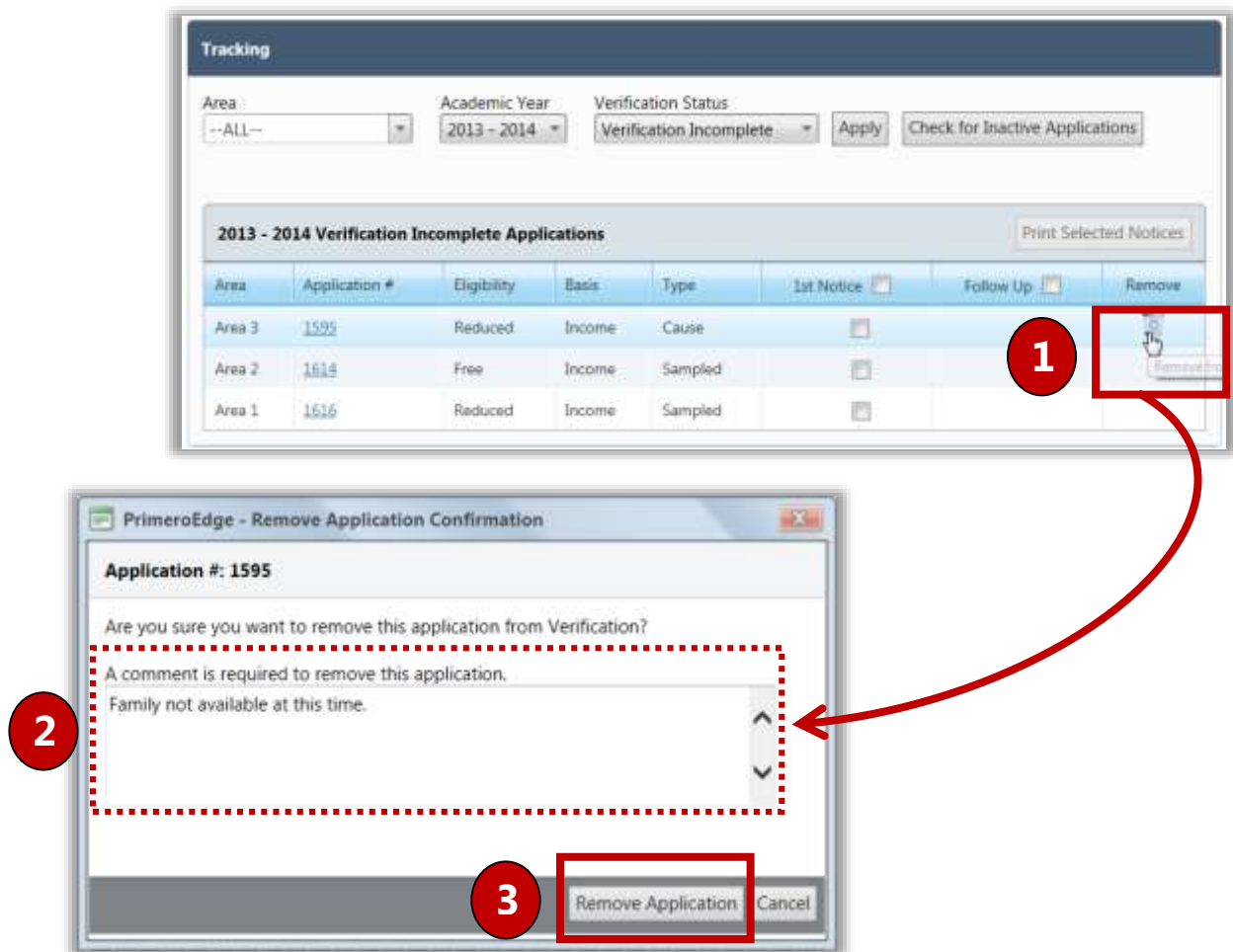
Application #	Eligibility	Basis	Type	1st Notice <input type="checkbox"/>	Follow Up <input type="checkbox"/>	Completion Notice <input checked="" type="checkbox"/>
1562	Free	Income	Cause	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1565	Free	Income	Cause	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Removing an Application from Tracking

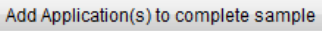
Districts are allowed to remove and replace up to 5% of their sample applications when the LEA believes that the household is fragile or will be unable to respond to the verification attempts. It is up to each district to follow the guidelines of 5% if they choose to remove applications.

To remove an application

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



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.

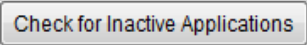
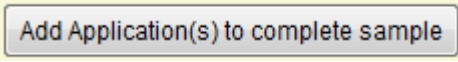
Click  to add applications to the verification sample.

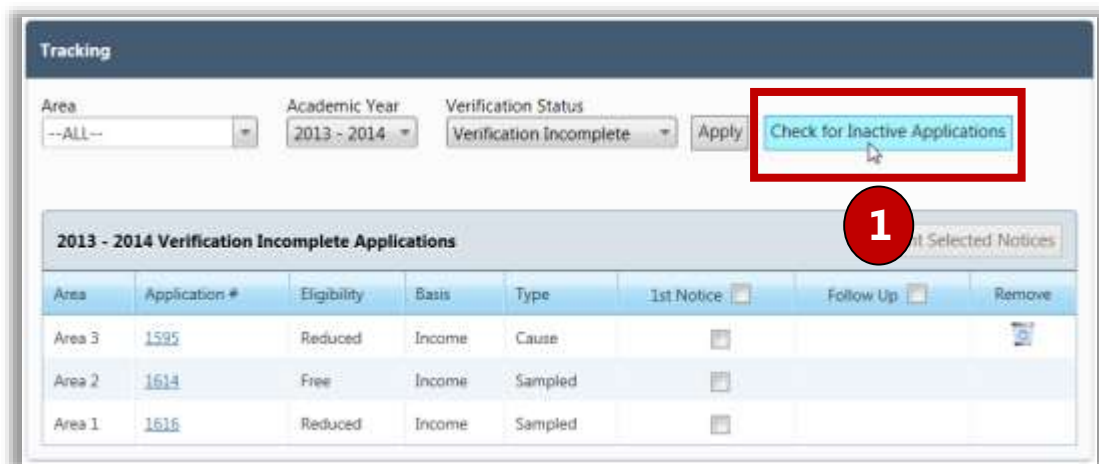
Replacing Inactive Applications

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.

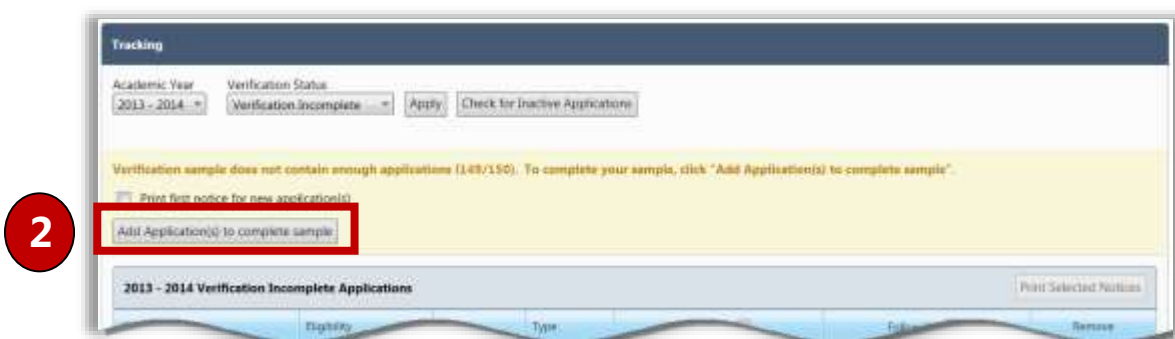
To add active applications to a Verification Sample

1. Click .
2. Click .




The screenshot shows the 'Tracking' interface. At the top, there are filters for 'Area' (set to --ALL--), 'Academic Year' (2013 - 2014), and 'Verification Status' (Verification Incomplete). An 'Apply' button is next to these filters. To the right, a blue button labeled 'Check for Inactive Applications' is highlighted with a red box. Below the filters, a table titled '2013 - 2014 Verification Incomplete Applications' is displayed. A red circle with the number '1' is placed over the 'Check for Inactive Applications' button.

Area	Application #	Eligibility	Basis	Type	1st Notice	Follow Up	Remove
Area 3	1595	Reduced	Income	Cause	<input type="checkbox"/>		
Area 2	1614	Free	Income	Sampled	<input type="checkbox"/>		
Area 1	1636	Reduced	Income	Sampled	<input type="checkbox"/>		



The screenshot shows the 'Tracking' interface after clicking 'Check for Inactive Applications'. A yellow warning message is displayed: 'Verification sample does not contain enough applications (148/150). To complete your sample, click "Add Application(s) to complete sample".' Below the message, there is a checkbox for 'Print first notice for new application(s)'. A red circle with the number '2' is placed over the 'Add Application(s) to complete sample' button, which is also highlighted with a red box.

2013 - 2014 Verification Incomplete Applications


Area	Application #	Eligibility	Basis	Type	1st Notice	Follow Up	Remove
Area 3	1595	Reduced	Income	Cause	<input type="checkbox"/>		
Area 2	1614	Free	Income	Sampled	<input type="checkbox"/>		
Area 1	1636	Reduced	Income	Sampled	<input type="checkbox"/>		

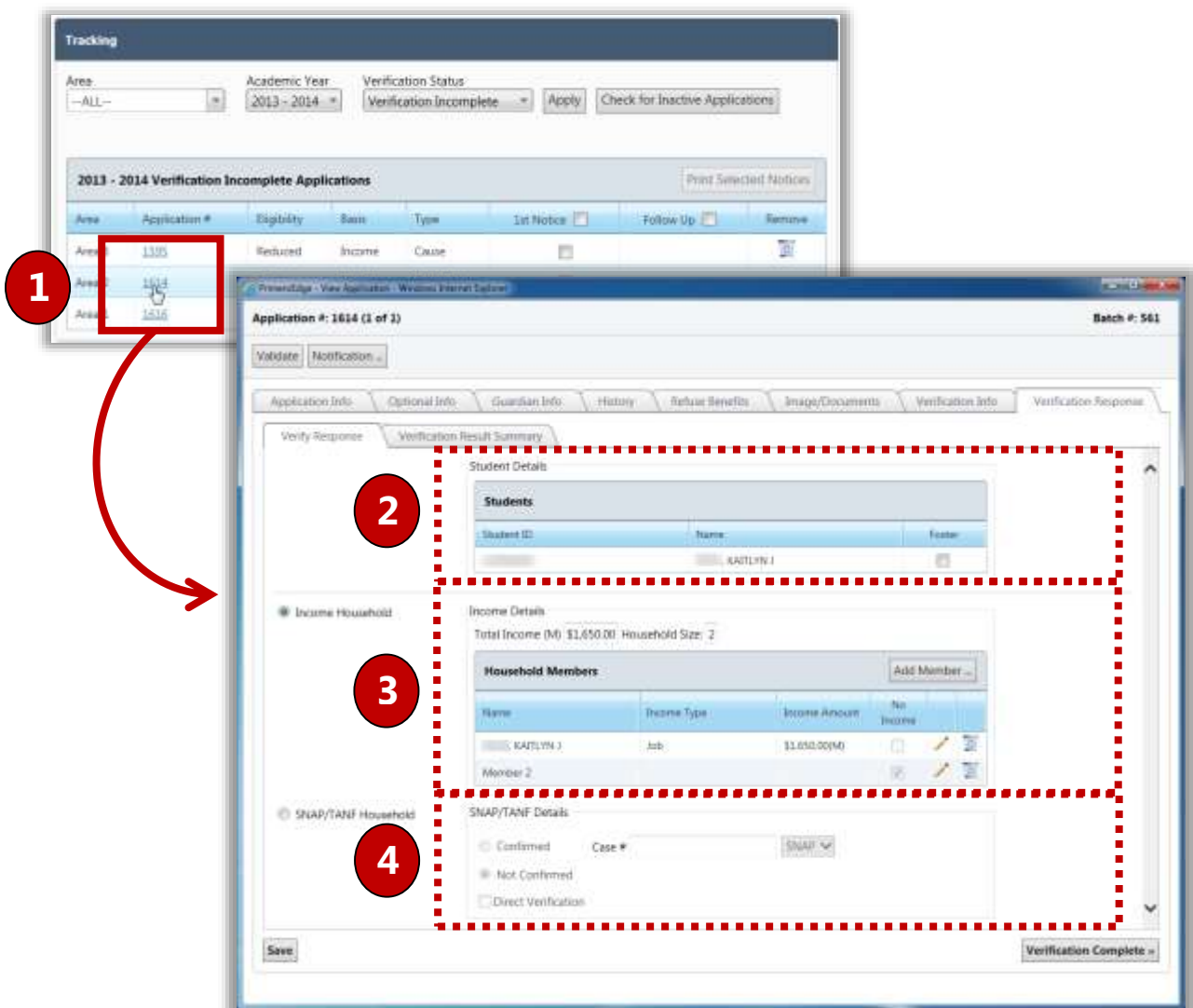
Processing a Verification Response

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 **Verify Response** sub-tab displays Verification details for this application. This tab is where you will record the response from the household. Household Income is the most commonly provided information in a response; therefore that selection is the default selection.

To process a verification response

1. Click the [Application Number](#) link in an application listing.
2. In the **Student Details** group, select **Foster** for each foster child, if any.
3. In the **Income Household** group, edit () income information, or add/remove household members, as needed.
4. In the **SNAP/TANF Household** group, select “Confirmed” and enter SNAP/TANF information, or select “Not Confirmed” if no information was provided. Select **Direct Verification** to indicate direct verification was used.



The screenshot displays the Tracking page and the Verify Response sub-tab. The Tracking page shows a list of applications with application numbers 1335, 1614, and 1616. A red box highlights application number 1614, with a red arrow pointing to the Verify Response sub-tab. The sub-tab shows the Student Details, Income Household, and SNAP/TANF Household sections. Red dashed boxes and numbered circles (1-4) highlight the specific areas mentioned in the instructions.

1 Application Number 1614

2 Student Details

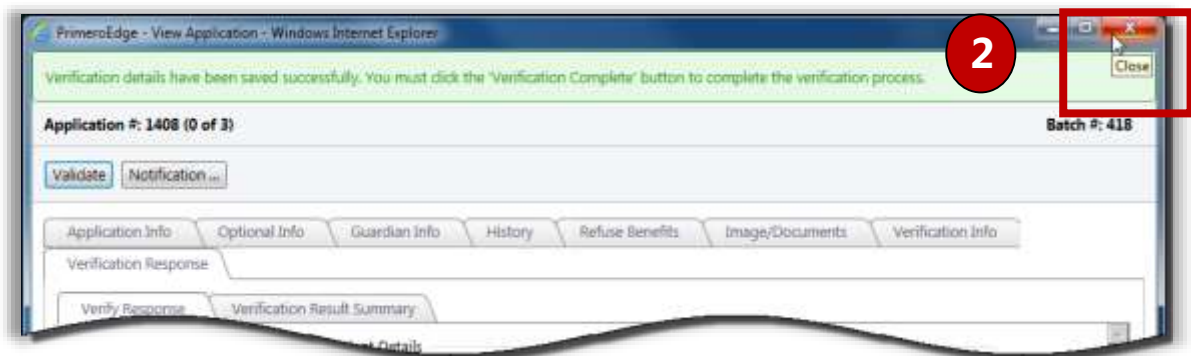
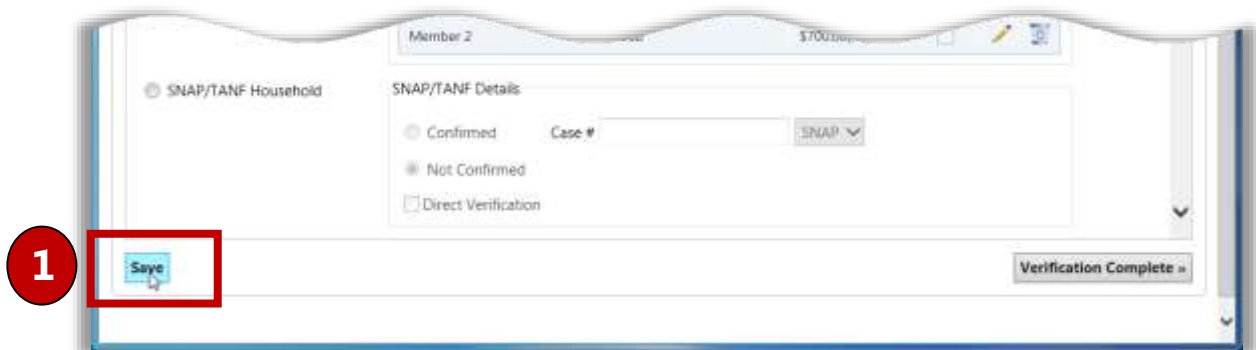
3 Income Household

4 SNAP/TANF Household

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:

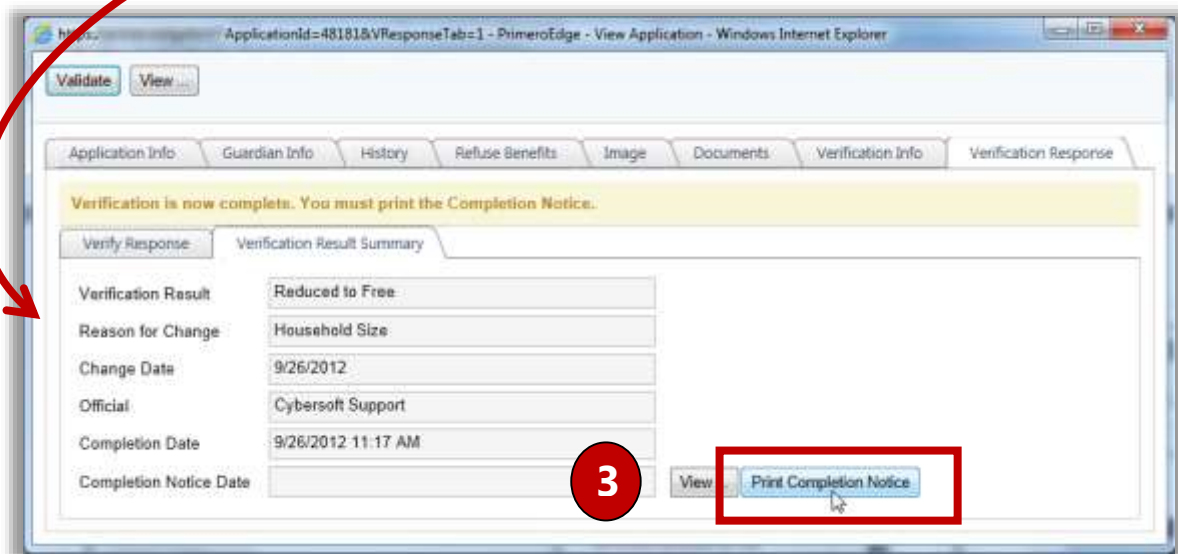
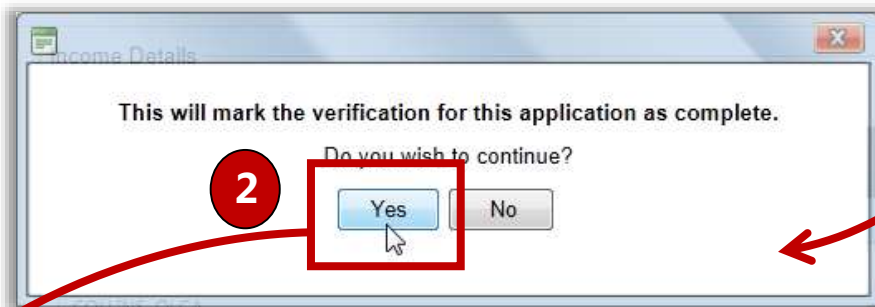
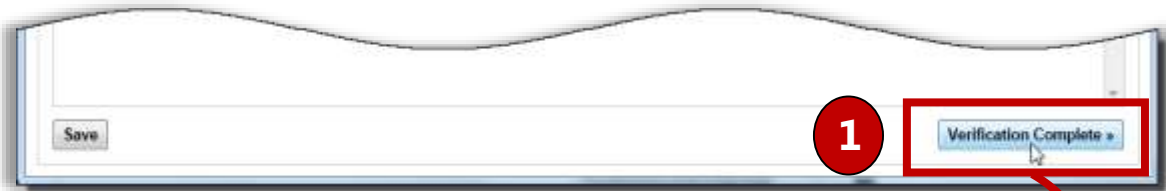
1. Click **Save** .
2. Click **Close** ().



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 **Print Completion Notice** on the **Verification Result Summary** sub-tab.



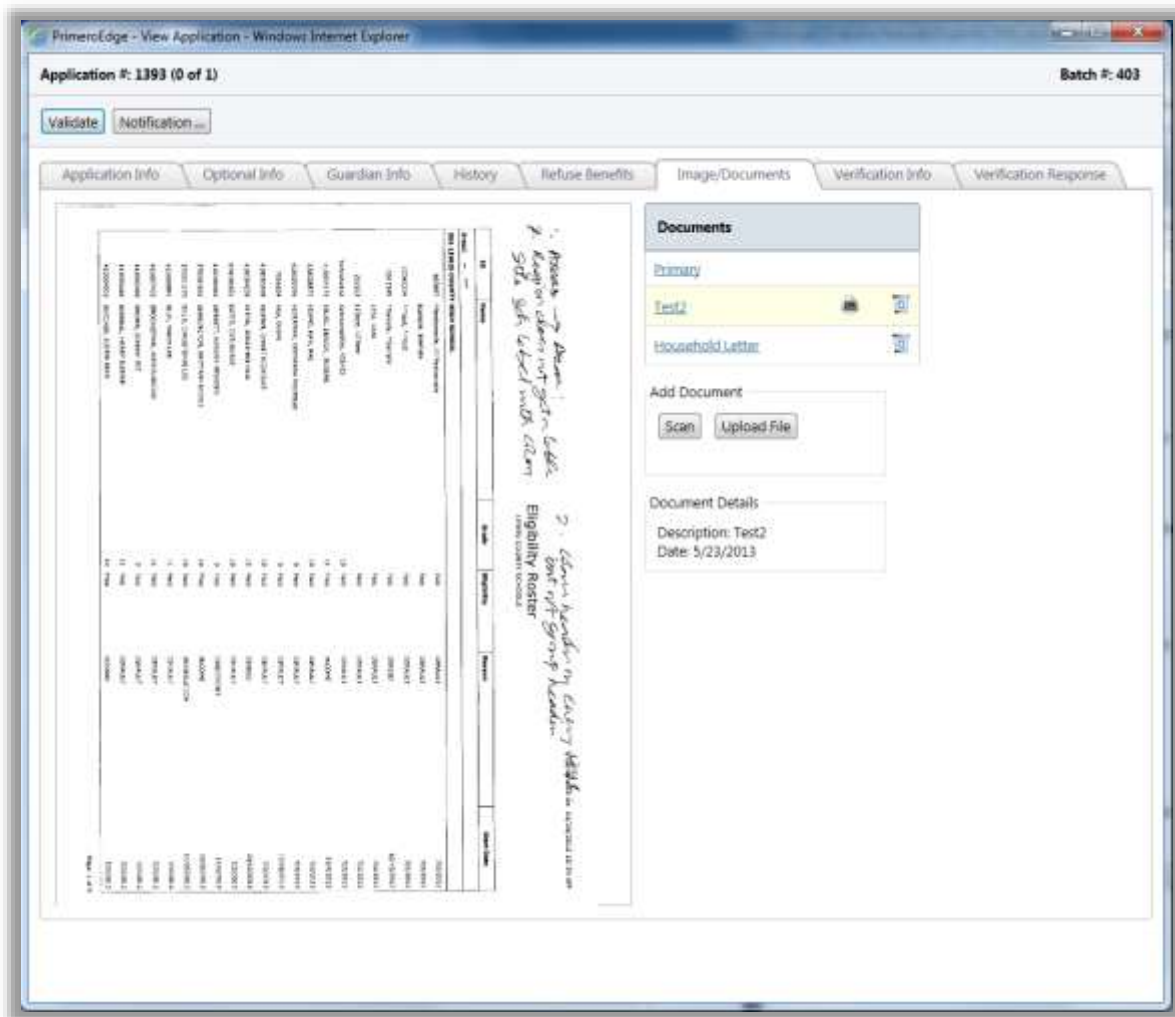
Scanning and Uploading Supporting Documents

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

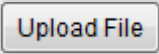


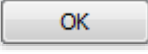
❗ Note: Scanning must be done from a computer with a scanner connected directly to the computer.

To scan a document

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




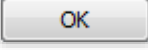
To upload a document

1. Click  .
2. Select the file name and click  .
3. Click  .
4. Enter a description to name the file.
5. Click  .

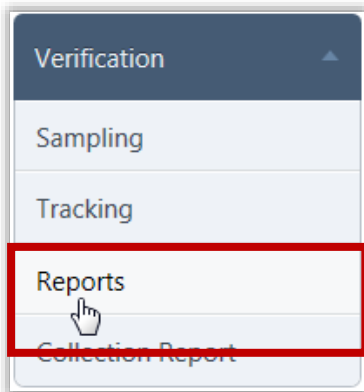
To view a scanned document

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.

To delete a scanned document

1. Select the document description and click  .
2. Click  in the confirmation message.

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.

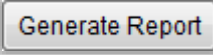
Reports Page

 A screenshot of the "Reports" page in a web application. At the top, there are two dropdown menus: "Area" set to "--ALL--" and "Academic Year" set to "2013 - 2014". Below these is a section titled "Verification Reports" containing a list of six items, each with a radio button: "Application Images" (selected), "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:

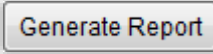

- **Area** is set to "ALL" if you have access to multiple areas, otherwise it is set to your area.
- **Academic Year** is set to the current school year.
- **Application Images** is selected in the Verification Reports group.

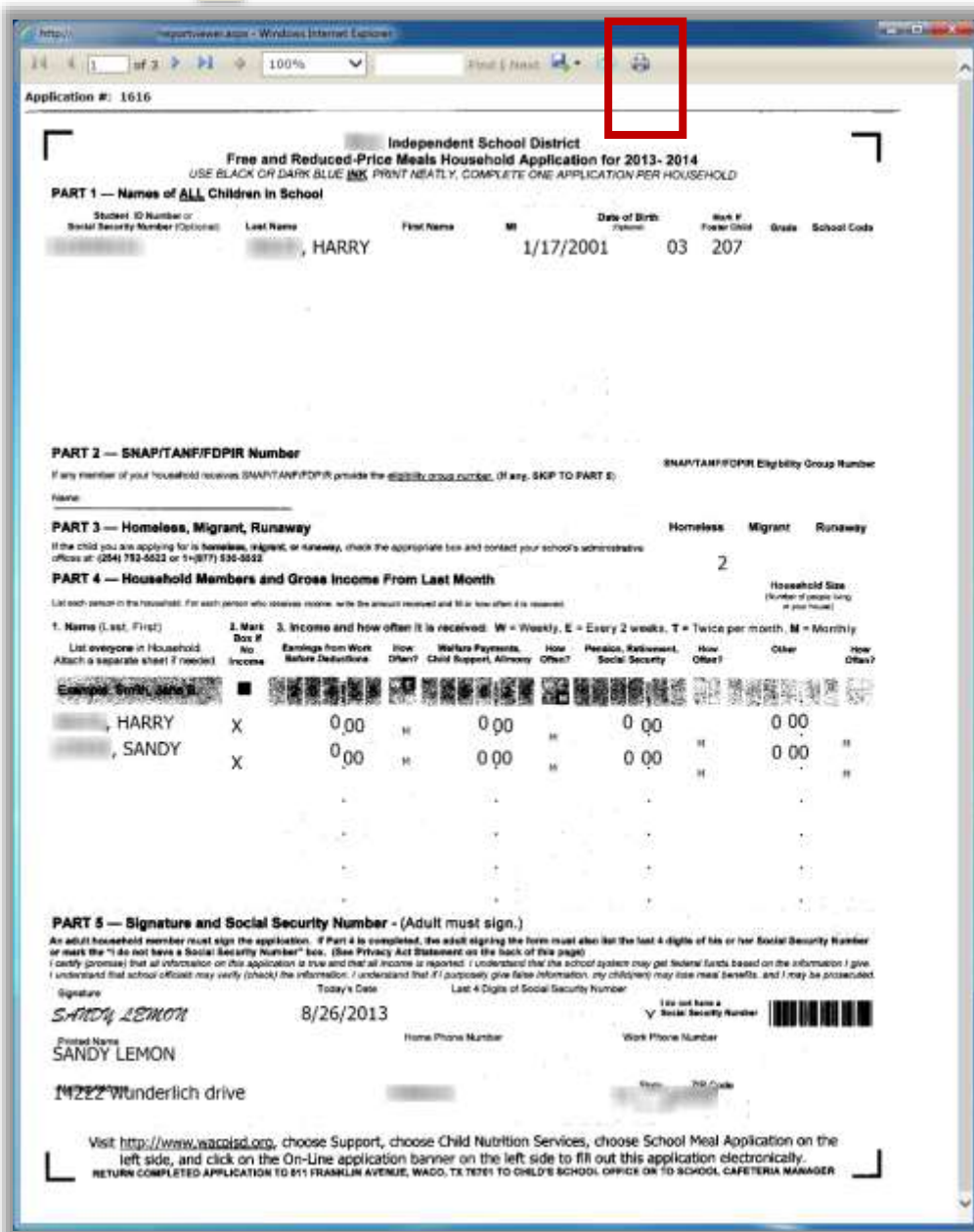
Page Functions

Button	Description
	Click to generate and display the selected report in the report viewer window.

Application Images

To generate and print application Images

1. Select **Application Images** and click .
2. Click **Print** ().



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 (Month)	Day	Month	Year	Grade	School Code
	HARRY			1/17/2001	03	207			

PART 2 — SNAP/TANF/FDPIR Number

SNAP/TANF/FDPIR Eligibility Group Number: 2

PART 3 — Homeless, Migrant, Runaway

Homeless: Migrant: Runaway:

PART 4 — Household Members and Gross Income From Last Month

1. Name (Last, First) List everyone in Household Attach a separate sheet if needed	2. Mark Box if No 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?
Example: Smith, John A.	<input type="checkbox"/>								
HARRY	X	0.00	M	0.00	M	0.00	M	0.00	M
SANDY	X	0.00	M	0.00	M	0.00	M	0.00	M

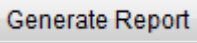

PART 5 — Signature and Social Security Number - (Adult must sign.)

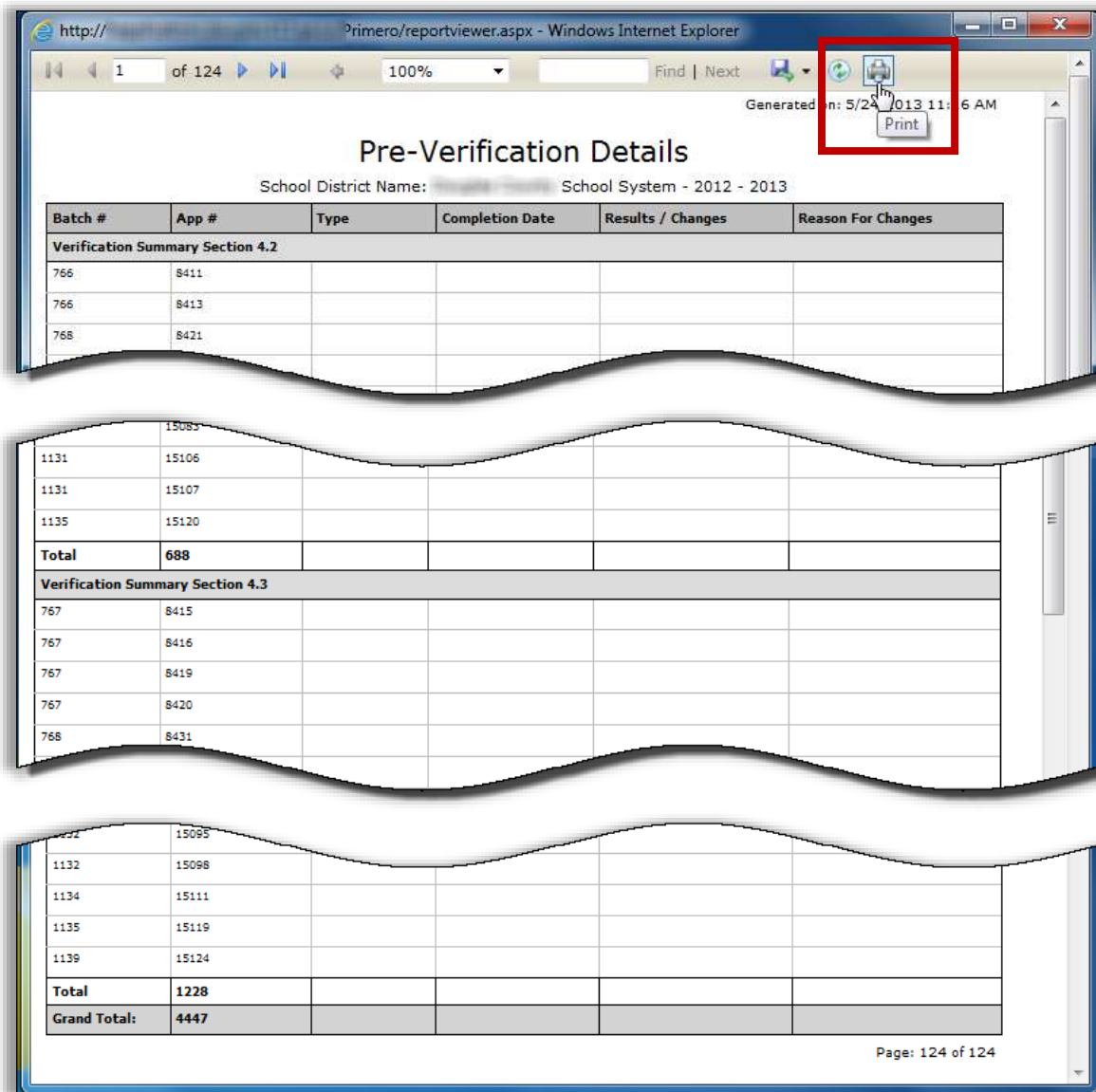
Signature: SANDY LEMON
 Today's Date: 8/26/2013
 Last 4 Digits of Social Security Number: [Redacted]
 Printed Name: SANDY LEMON
 Home Phone Number: [Redacted]
 Work Phone Number: [Redacted]
 Address: 11222 Wunderlich drive

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 611 FRANKLIN AVENUE, WACO, TX 76761 TO CHILD'S SCHOOL OFFICE OR TO SCHOOL CAFETERIA MANAGER

Pre-Verification Details

To generate and print a Pre-Verification Details report

1. Select **Pre-Verification Details** and click .
2. Click **Print** ()



Generated on: 5/24/2013 11:06 AM

Pre-Verification Details

School District Name: [REDACTED] School System - 2012 - 2013

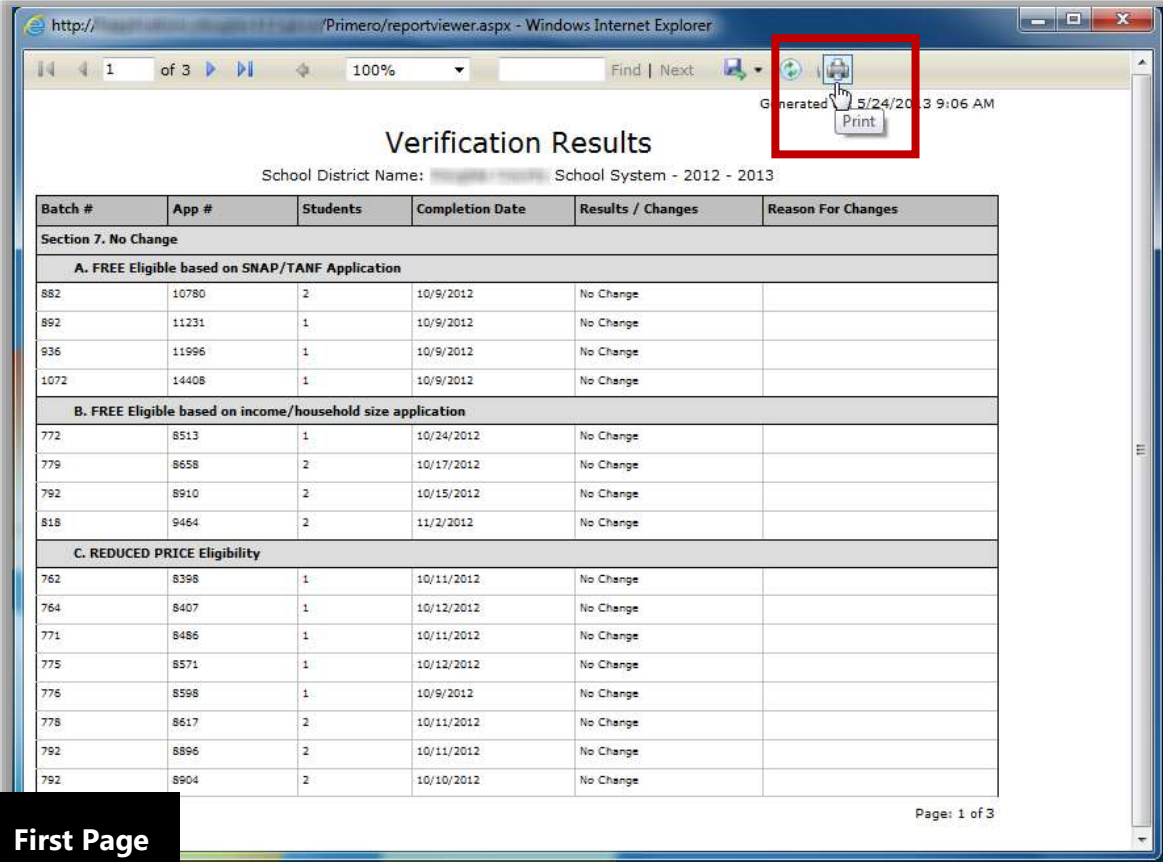
Batch #	App #	Type	Completion Date	Results / Changes	Reason For Changes
Verification Summary Section 4.2					
766	8411				
766	8413				
768	8421				
...					
1131	15106				
1131	15107				
1135	15120				
Total	688				
Verification Summary Section 4.3					
767	8415				
767	8416				
767	8419				
767	8420				
768	8431				
...					
1132	15098				
1134	15111				
1135	15119				
1139	15124				
Total	1228				
Grand Total:	4447				

Page: 124 of 124

Verification Results Details

To generate and print a Verification Results report

1. Select **Verification Results Details** and click .
2. Click **Print** ()



Generated on: 5/24/2013 9:06 AM

Verification Results

School District Name: ... School System - 2012 - 2013

Batch #	App #	Students	Completion Date	Results / Changes	Reason For Changes
Section 7. No Change					
A. FREE Eligible based on SNAP/TANF Application					
882	10780	2	10/9/2012	No Change	
892	11231	1	10/9/2012	No Change	
936	11996	1	10/9/2012	No Change	
1072	14408	1	10/9/2012	No Change	
B. FREE Eligible based on income/household size application					
772	8513	1	10/24/2012	No Change	
779	8658	2	10/17/2012	No Change	
792	8910	2	10/15/2012	No Change	
818	9464	2	11/2/2012	No Change	
C. REDUCED PRICE Eligibility					
762	8398	1	10/11/2012	No Change	
764	8407	1	10/12/2012	No Change	
771	8486	1	10/11/2012	No Change	
775	8571	1	10/12/2012	No Change	
776	8598	1	10/9/2012	No Change	
778	8617	2	10/11/2012	No Change	
792	8896	2	10/11/2012	No Change	
792	8904	2	10/10/2012	No Change	

Page: 1 of 3



Generated on: 5/24/2013 9:03 AM

Verification Results


School District Name: ... School System - 2012 - 2013

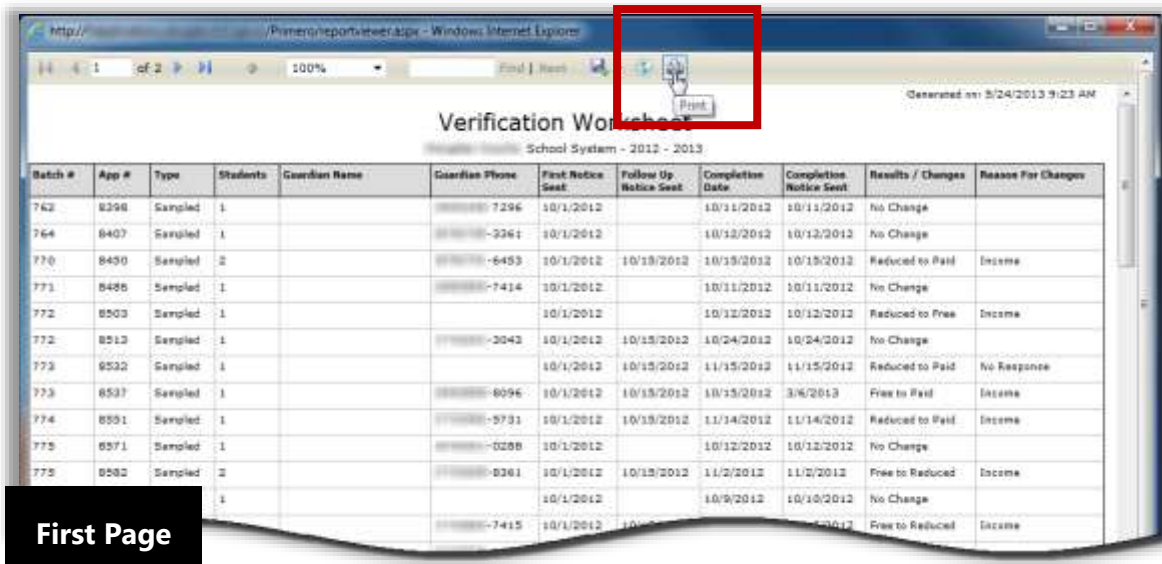
Batch #	App #	Students	Completion Date	Results / Changes	Reason For Changes
Section 11. Did not respond					
C. REDUCED PRICE Eligibility					
773	8532	1	11/15/2012	Reduced to Paid	No Response
Total	1	1			
Grand Total:	52	79			

Page: 3 of 3

Verification Worksheet

To generate and print a Verification Worksheet

1. Select **Verification Worksheet** and click **Generate Report**.
2. Click **Print** ().



Generated on: 3/24/2013 9:23 AM

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		888888-7296	10/1/2012		10/11/2012	10/11/2012	No Change	
764	8407	Sampled	1		888888-3261	10/1/2012		10/12/2012	10/12/2012	No Change	
770	8450	Sampled	2		888888-6453	10/1/2012	10/19/2012	10/19/2012	10/19/2012	Reduced to Paid	Income
773	8486	Sampled	1		888888-7414	10/1/2012		10/11/2012	10/11/2012	No Change	
772	8503	Sampled	1		888888-3043	10/1/2012		10/12/2012	10/12/2012	Reduced to Free	Income
772	8513	Sampled	1		888888-3043	10/1/2012	10/15/2012	10/24/2012	10/24/2012	No Change	
773	8532	Sampled	1		888888-7414	10/1/2012	10/15/2012	11/15/2012	11/15/2012	Reduced to Paid	No Response
773	8537	Sampled	1		888888-8096	10/1/2012	10/15/2012	10/15/2012	3/6/2013	Free to Paid	Income
774	8551	Sampled	1		888888-5731	10/1/2012	10/19/2012	11/14/2012	11/14/2012	Reduced to Paid	Income
775	8571	Sampled	1		888888-0288	10/1/2012		10/12/2012	10/12/2012	No Change	
775	8582	Sampled	2		888888-8361	10/1/2012	10/19/2012	11/2/2012	11/2/2012	Free to Reduced	Income
			1		888888-7415	10/1/2012	10/19/2012	10/9/2012	10/10/2012	No Change	
			1		888888-7415	10/1/2012	10/19/2012	10/9/2012	10/10/2012	Free to Reduced	Income

First Page


818	9452	Sampled	2		888888-9452	10/1/2012		10/9/2012	10/9/2012	No Change	
818	9458	Sampled	1		888888-9452	10/1/2012	10/15/2012	10/26/2012	10/26/2012	No Change	
818	9464	Sampled	2		888888-7679	10/1/2012	10/15/2012	11/2/2012	11/2/2012	No Change	
859	10319	Cases	2		888888-6329	4/4/2013	4/18/2013	4/19/2013	4/19/2013	No Change	
882	10780	Sampled	2		888888-8150	10/1/2012		10/9/2012	10/11/2012	No Change	
892	11231	Sampled	1		888888-4912	10/1/2012		10/9/2012	10/9/2012	No Change	
936	11996	Sampled	1		888888-3003	10/1/2012		10/9/2012	10/9/2012	No Change	
1023	12660	Cases	3		888888-8289	9/7/2012	9/17/2012	10/3/2012	10/3/2012	Free to Paid	No Response
1072	14428	Sampled	1		888888-8289	10/1/2012		10/9/2012	10/9/2012	No Change	
1362	16106	Cases	2		888888-1827	3/1/2013	3/6/2013	3/13/2013	3/13/2013	Reduced to Free	Income
Total:	32		82								

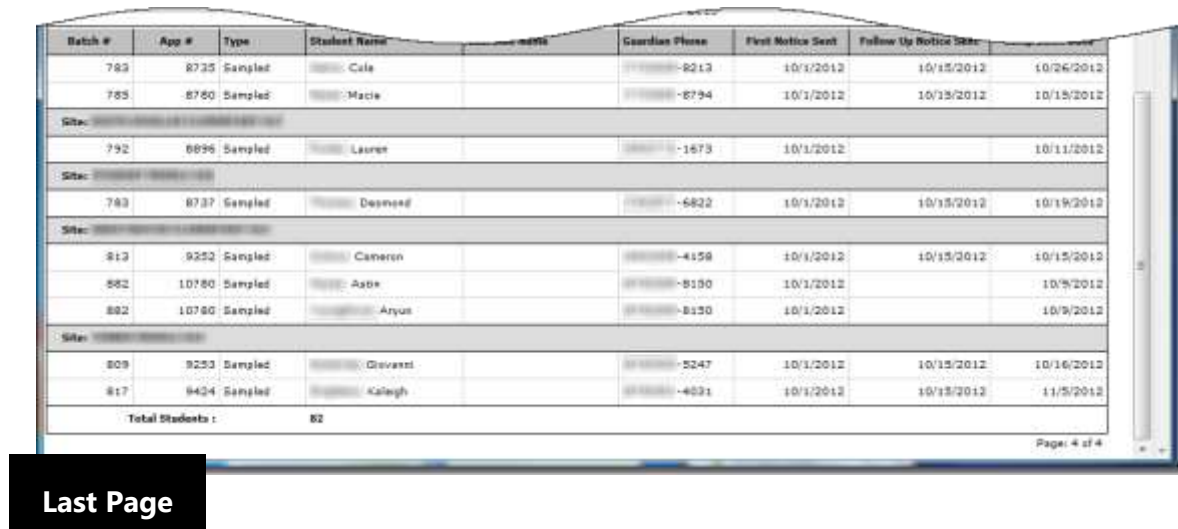
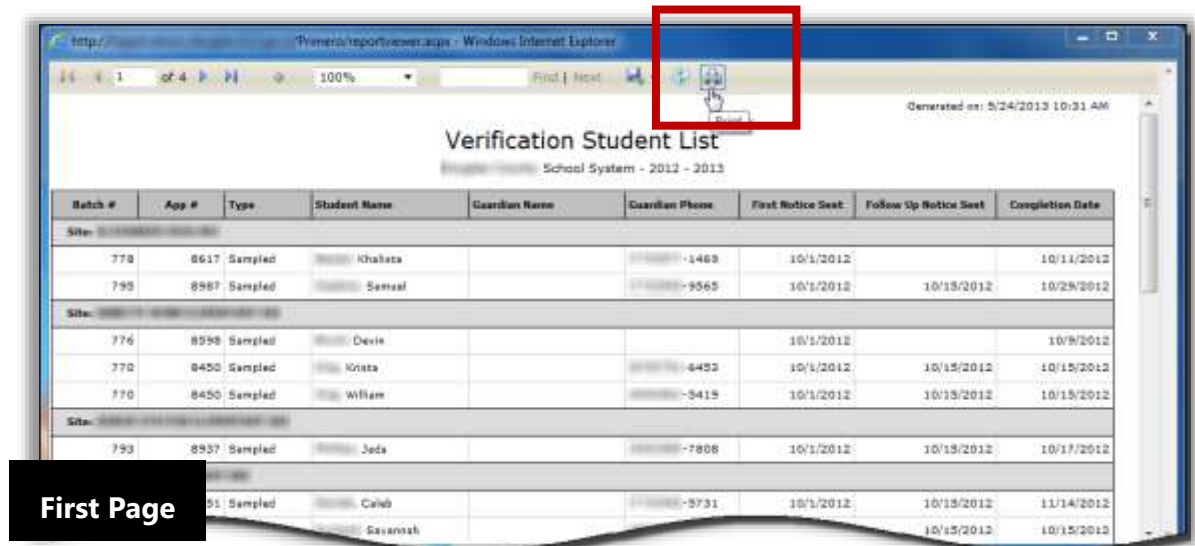
Page: 2 of 2

Last Page

Verification Student List

To generate and print a Verification Student List report

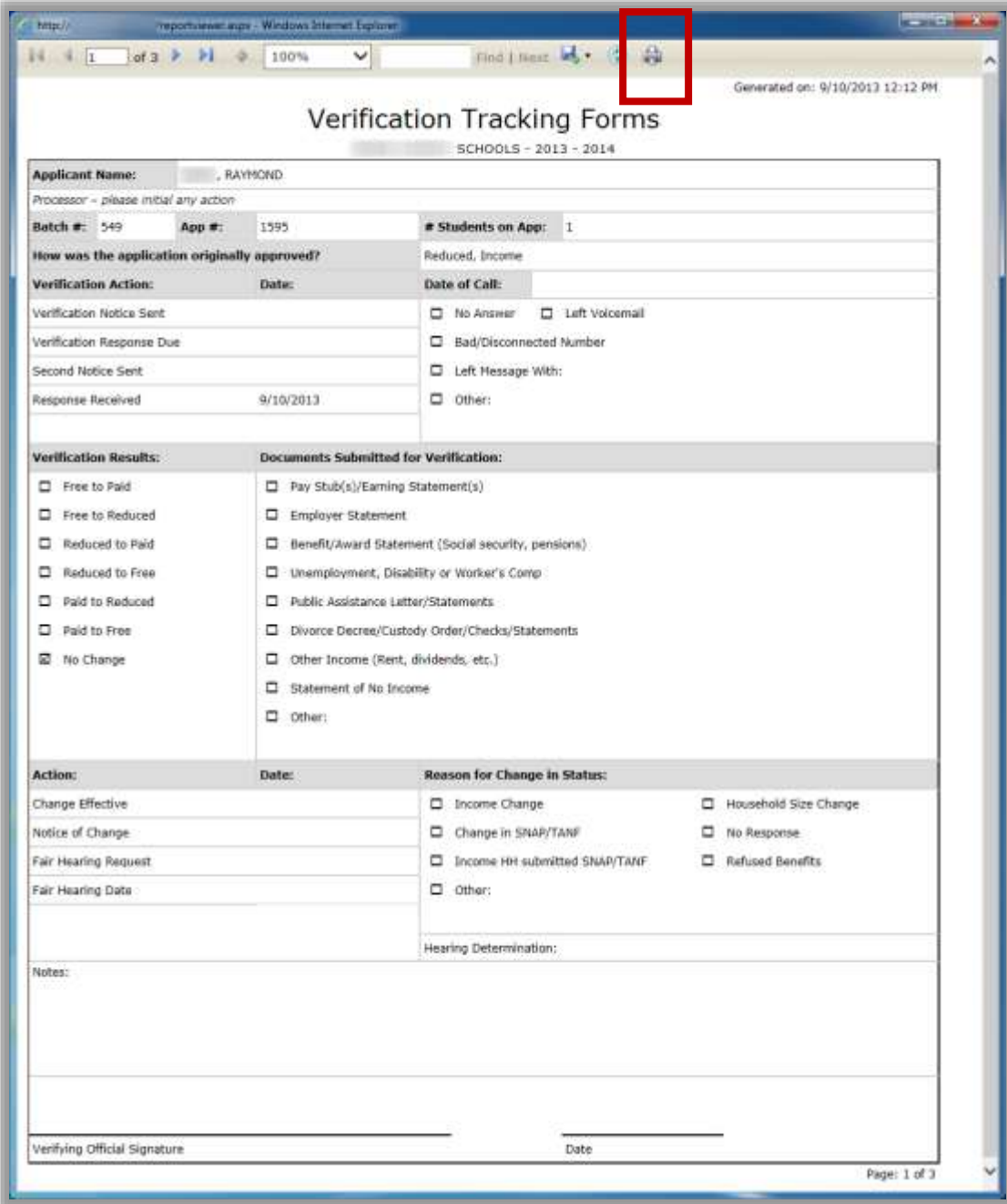
1. Select **Verification Student List**.
2. Enter **Site Code** and **Site**, if needed and click **Generate Report**.
3. Click **Print** ().



Verification Tracking Forms

To generate and print Verification Tracking Forms

1. Select **Verification Tracking Forms** and click .
2. Click **Print** ()
- 3.



Generated on: 9/10/2013 12:12 PM

Verification Tracking Forms

SCHOOLS - 2013 - 2014

Applicant Name: _____, RAYMOND

Processor - please initial any action

Batch #: 549 **App #:** 1595 **# Students on App:** 1

How was the application originally approved? Reduced, Income

Verification Action: **Date:** **Date of Call:**

Verification Notice Sent No Answer Left Voicemail

Verification Response Due Bad/Disconnected Number

Second Notice Sent Left Message With:

Response Received 9/10/2013 Other:

Verification Results: **Documents Submitted for Verification:**

Free to Paid Pay Stub(s)/Earning Statement(s)

Free to Reduced Employer Statement

Reduced to Paid Benefit/Award Statement (Social security, pensions)

Reduced to Free Unemployment, Disability or Worker's Comp

Paid to Reduced Public Assistance Letter/Statements

Paid to Free Divorce Decree/Custody Order/Checks/Statements

No Change Other Income (Rent, dividends, etc.)

Statement of No Income

Other:

Action: **Date:** **Reason for Change in Status:**

Change Effective Income Change Household Size Change

Notice of Change Change in SNAP/TANF No Response

Fair Hearing Request Income HH submitted SNAP/TANF Refused Benefits

Fair Hearing Date Other:

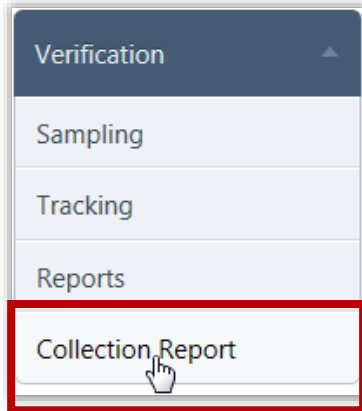
Hearing Determination:

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 USDA on or about November 15 each year.

After reapplications have been submitted and processed, final submission of the report is on or about February 15.



Collection Report Page



By default on the Collection Report page:

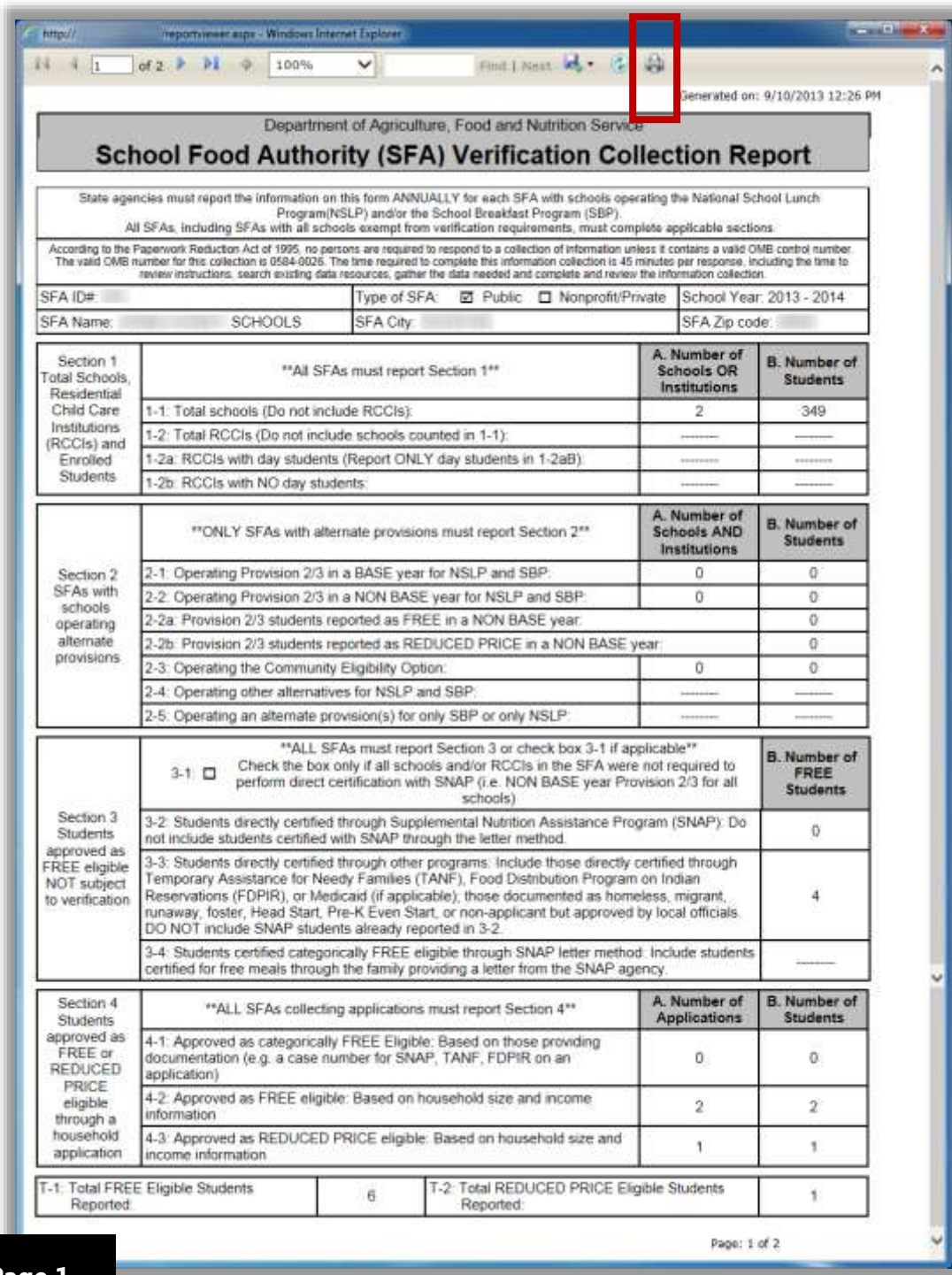
- **Area** is set to the first area if you have access to multiple areas.
- **Academic Year** is set to the current school year.

Page Functions

Button	Description
	Click to generate and display the Verification Collection report in the report viewer window.
	Click to send district verification summary data to USDA website.

To generate and print a Verification Collection report

1. Click  .
2. Click **Print** ().



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 (FDPRI), 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, FDPRI 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

http:// /reportviewer.aspx - Windows Internet Explorer
 2 of 2 100% Find | Next
 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.	A. Number of Applications	B. Number of Students
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

8

Reviews

In this section you will learn how to:

- ✓ Set up and manage application review auditors.
- ✓ Review applications included in an audit.

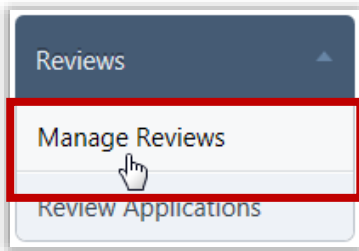
Reviews at a Glance

Menu Function	Description
Manage Reviews	Set up an auditor to review applications.
Review Applications	Review applications included in an audit for a selected school year

 **Note:**

Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Reviews** menu, you may see a subset of the functions listed above or you may not have access to all of the features for each menu selection.

Manage Reviews



Manage Reviews sets up or removes auditors who are allowed to manage Free & Reduced Eligibility data in PrimeroEdge.

Manage Reviews Page


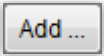


 A screenshot of the 'Manage Reviews' page. At the top, there is a header 'Manage Reviews'. Below it, there is a section for 'Academic Year' with a dropdown menu set to '2012 - 2013' and an 'Apply' button. Below this is a section titled 'Auditors' with an 'Add ...' button. The auditors are listed in a table with columns for 'User Name', 'Level', 'Sites', 'Date Range', 'Edit', and 'Delete'.

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]

By default, on the **Manage Reviews** page:



- **Academic Year** is set to the current school year.
- All auditors are displayed in the **Auditors** list.

Page Functions

Button	Description
	Click to display list of auditors for the selected Academic Year .
	Click to add a new auditor for a site.
Edit ()	Click to make changes to assigned sites for an auditor.
Delete ()	Click to delete an auditor listing.

Listings: Auditors



Header Name	Data Type	Description
User Name	<i>View only</i>	Auditor's name
Level	<i>View only</i>	User's permission level
Sites	<i>View only</i>	Site with which the auditor has permission to work
Date range	<i>View only</i>	Date range during which the auditor has permission to work with site data.
Edit	<i>Clickable icon</i> ()	Click to display the Add or Edit Auditor popup; use the Add or Edit Auditor popup to make changes to an auditor's starting/ending dates of review and to add sites to the list of assigned sites.
Delete	<i>Clickable icon</i> ()	Click to remove user name from list.

Adding an Auditor

To add an auditor

1. Click **Add ...**.
2. Select a user name and a date range in the **Add / Edit Auditor** popup, and click **Save**.
3. Select a **Site Code / Site** and click **Add Site**.
4. Repeat step #3 for all sites that the user is to review and click **Save**.

The first screenshot shows the 'Manage Reviews' interface. The 'Academic Year' is set to '2012 - 2013'. Below this is a table of auditors. A red circle with the number '1' highlights the 'Add ...' button in the top right corner of the auditors table.

The second screenshot shows the 'Add / Edit Auditor' popup window. The 'User' field is set to 'Sherry Campbell - STATE'. The 'Start Date' is '5/24/2013' and the 'End Date' is '6/30/2013'. A red circle with the number '2' highlights the 'Save' button at the bottom left of the popup.

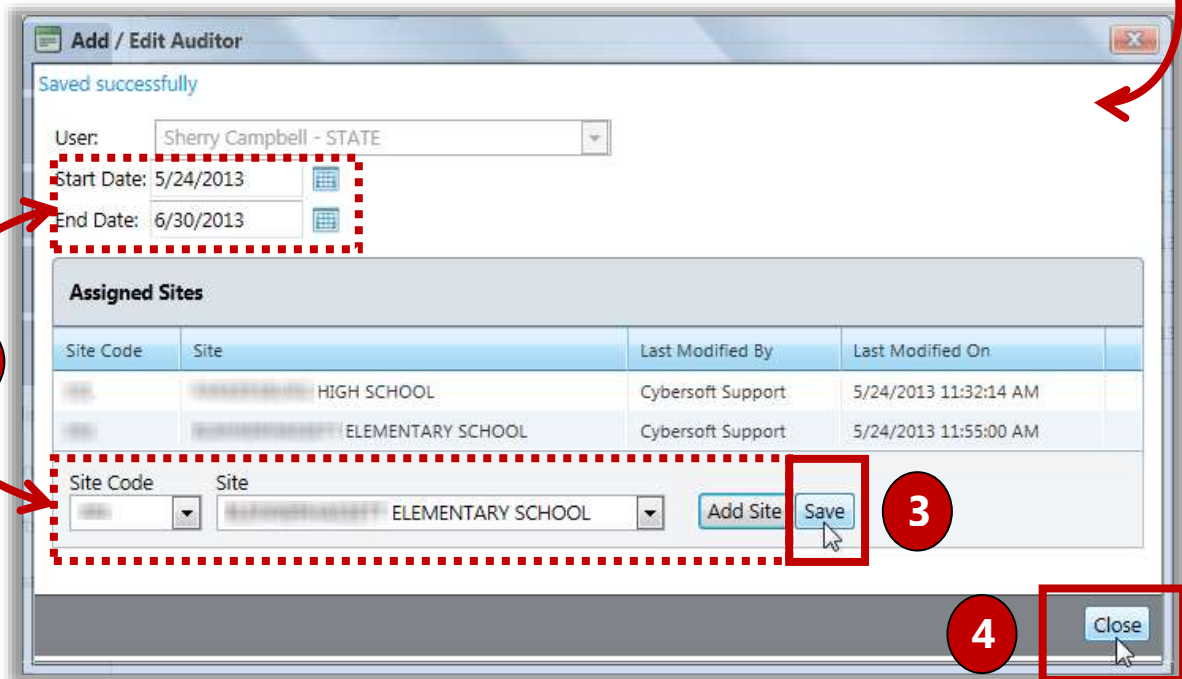
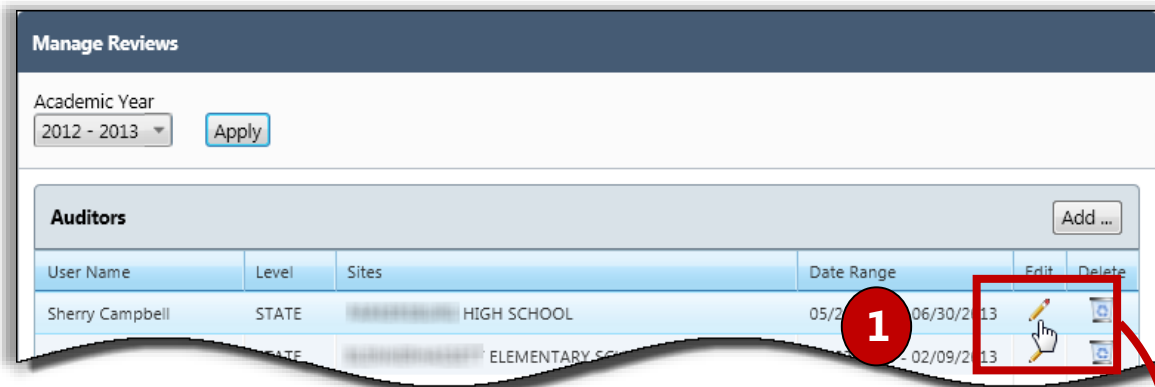
The third screenshot shows the 'Add / Edit Auditor' popup window after successful addition. A message 'Added successfully' is displayed. Below the message is a table of 'Assigned Sites'. The first row shows 'HIGH SCHOOL' with 'Last Modified By' as 'Cybersoft Support' and 'Last Modified On' as '5/24/2013 11:32:14 AM'. A red circle with the number '3' highlights the 'Add Site' button and a red circle with the number '4' highlights the 'Save' button at the bottom of the popup.

Updating Auditor Details

To update auditor details


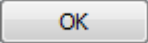
1. Click **Edit** (✎) in an Auditor listing.
2. Enter or select new review dates and add sites, as needed.
3. Click **Save**.
4. Click **Close**.

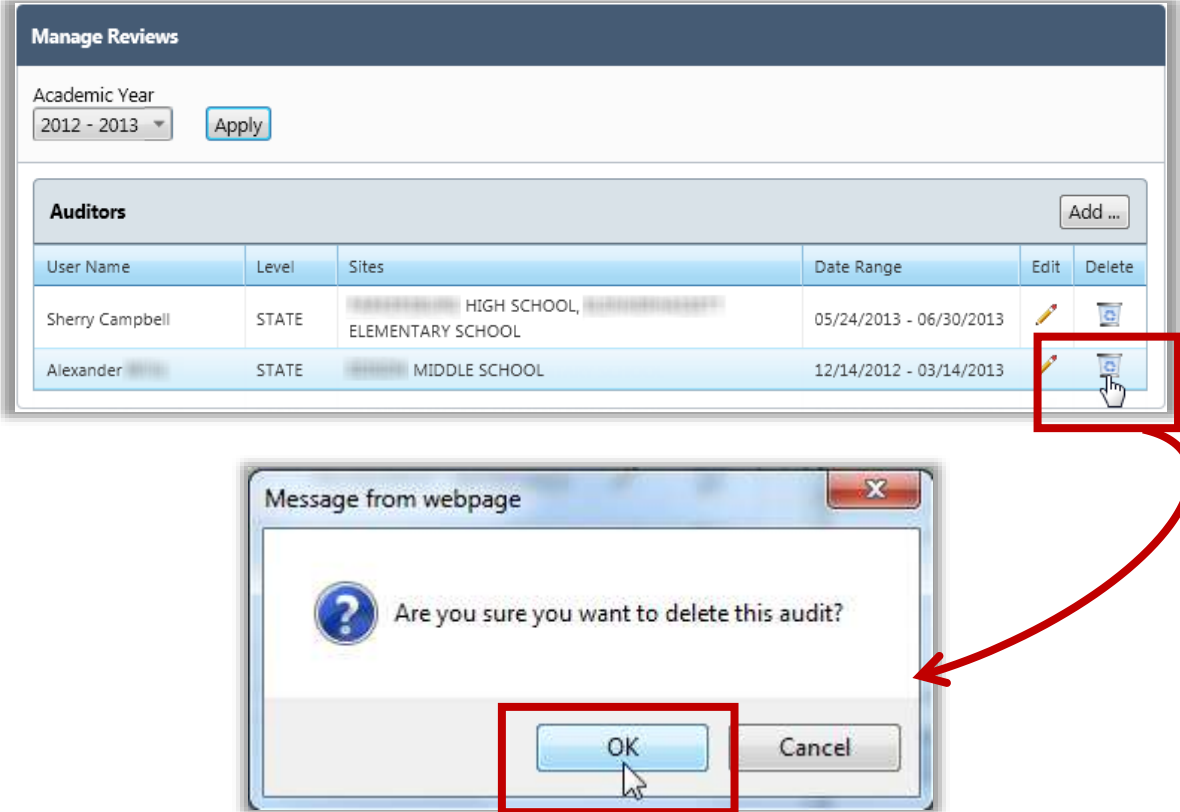
★ Note Only auditor data for the current **Academic Year** can be changed. Auditor records for prior years cannot be changed.







Deleting an Auditor

To delete an auditor

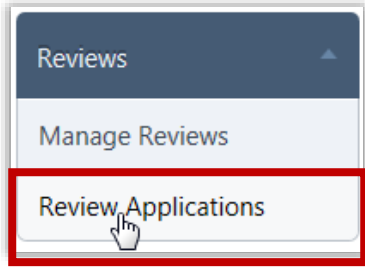
1. Click **Delete** () in an Auditor listing.
2. Click  in the message popup.



The screenshot shows the 'Manage Reviews' interface. At the top, there is a header 'Manage Reviews' and a filter for 'Academic Year' set to '2012 - 2013' with an 'Apply' button. Below this is a table titled 'Auditors' with columns: User Name, Level, Sites, Date Range, Edit, and Delete. The table contains two rows: Sherry Campbell (STATE, HIGH SCHOOL, ELEMENTARY SCHOOL, 05/24/2013 - 06/30/2013) and Alexander (STATE, MIDDLE SCHOOL, 12/14/2012 - 03/14/2013). A red box highlights the 'Delete' icon (trash) for Alexander. A red arrow points from this icon to a 'Message from webpage' dialog box. The dialog box contains a question mark icon and the text 'Are you sure you want to delete this audit?'. At the bottom of the dialog box, the 'OK' button is highlighted with a red box, and a mouse cursor is pointing at it.

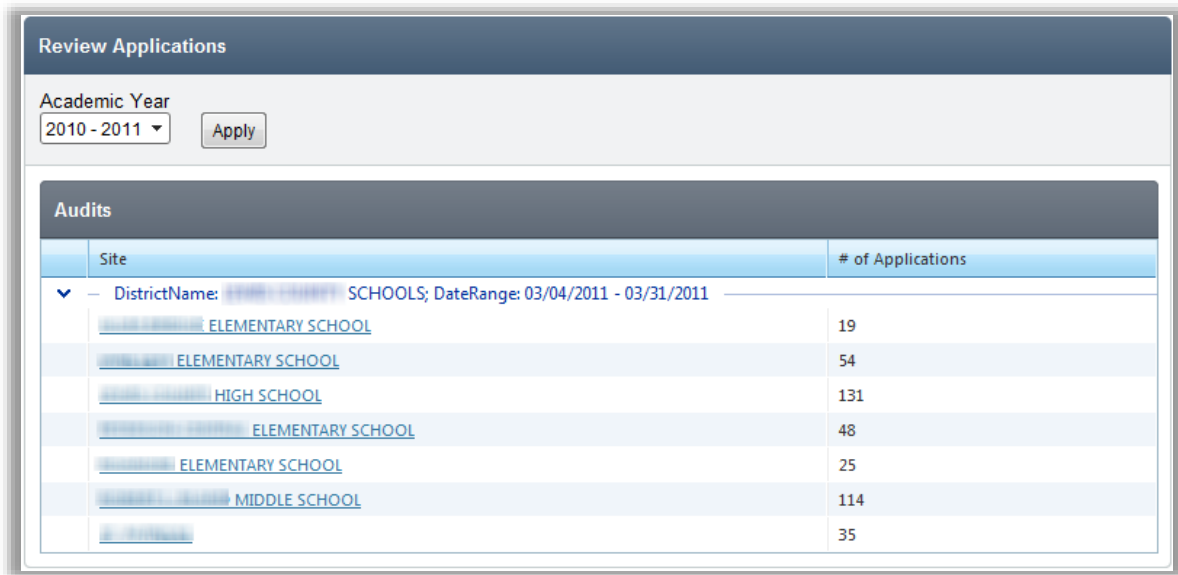
User Name	Level	Sites	Date Range	Edit	Delete
Sherry Campbell	STATE	██████████ HIGH SCHOOL, ██████████ ELEMENTARY SCHOOL	05/24/2013 - 06/30/2013		
Alexander	STATE	██████████ MIDDLE SCHOOL	12/14/2012 - 03/14/2013		

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 Page



By default on the **Review Applications** page:


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

Page Functions

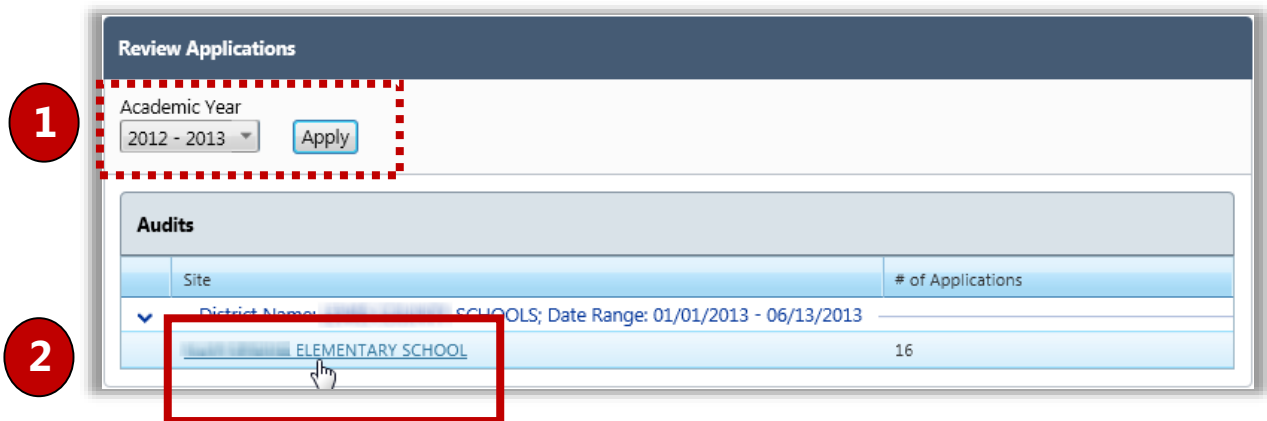
Button	Description
	Click to display list of audits for the selected Academic Year .

Reviewing Applications

To review applications

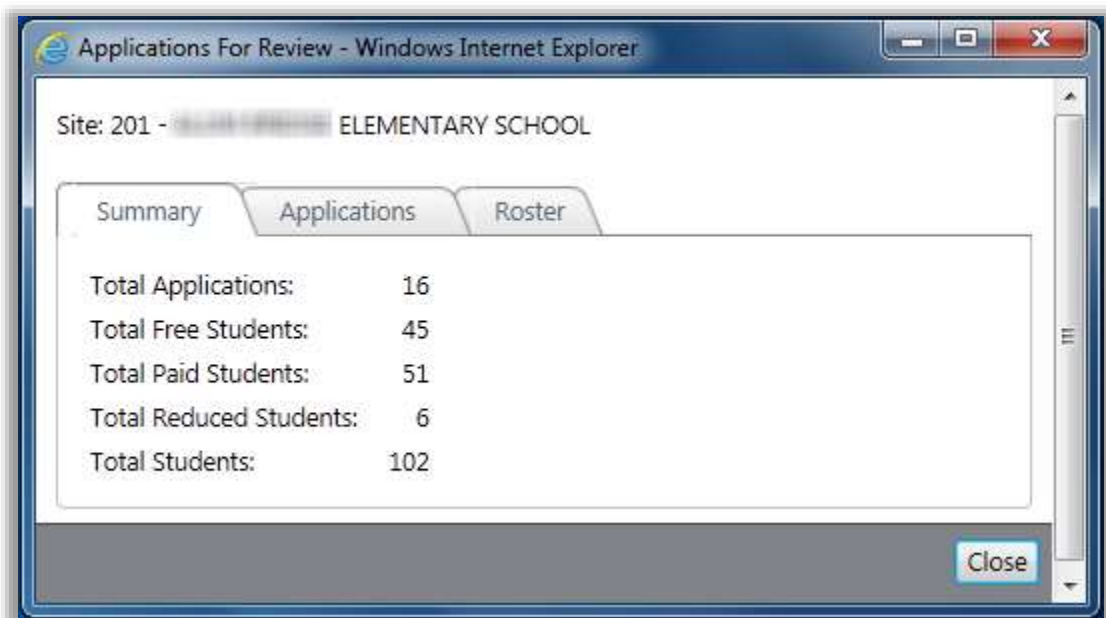
1. Select a school year in **Academic Year** and click  .
2. Click a [School Name](#) link in a site listing.

★ Note: The current date must be within the date range of the review created in **Manage Reviews** to be able to view application data.



Summary tab

The **Summary** tab provides totals for applications, students and by eligibility.



Reapplying After Verification

After the Verification process is complete, a student may submit an application for Free and Reduced Price Meals for various reasons. Even though the first application determined that the student was not eligible for benefits at the time the application was submitted, life changes in the students circumstances may now qualify the student for Free or Reduced Price meals.

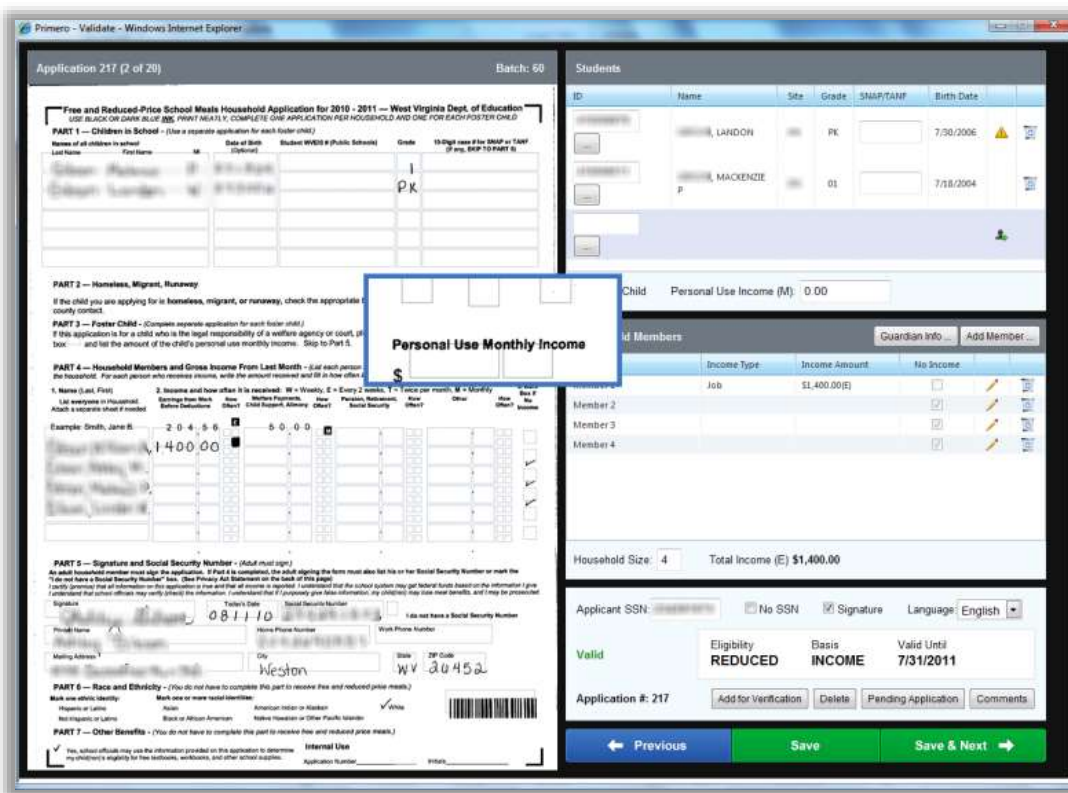
The following example is how to handle this situation in PrimeroEdge.

First Application for Free & Reduced Meals—**August**

Our student, Janie, applies for Free or Reduced Price Meals through PrimeroEdge.

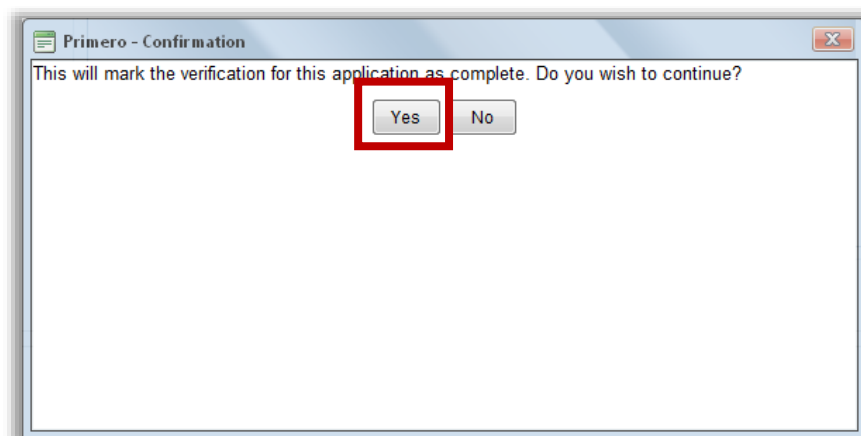
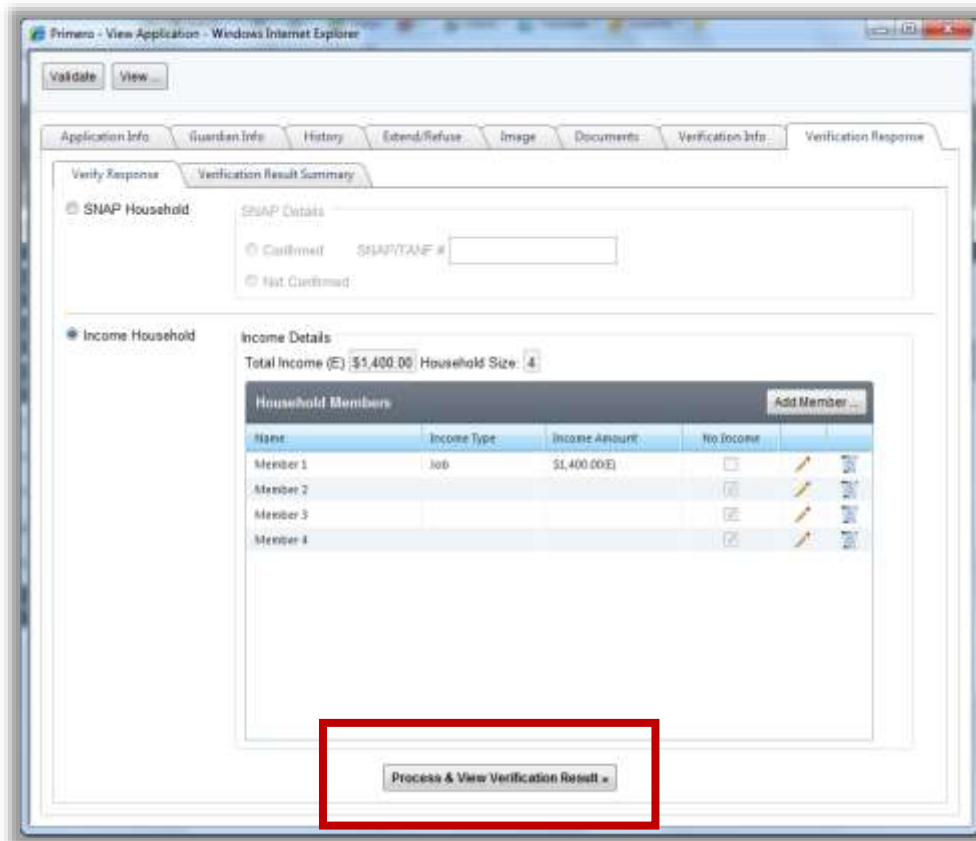
1. Janie submits an application—either a paper application that is scanned, entered through the district’s Online Applications website, or entered by the Central Office through **Manual Entry** on the **Applications** menu into PrimeroEdge.
2. Proof of income is provided.
3. The application is validated and Free & Reduced Meal Eligibility is determined as “Reduced”.
4. Janie’s application is added for verification by clicking **Add For Verification** in the Validation Workspace.

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.



To process the application

1. On the **Compliance** menu, select **Verification Tracking**.
2. Click **Process & View Verification Result »** on the **Verify Response** tab of the **View Application** popup.
3. Click **Yes** in the confirmation message.



Reapplication for Free & Reduced Meals—**JANUARY**

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:

- Janie’s household loses all income.
- Janie’s guardian completes a new application which is scanned into PrimeroEdge.
- When the new application is opened in the Validation Workspace, a message is shown.

Message text:

One or more students on this application were selected for Verification. Did the Household submit proof of income with this application?

- YES—If you have proof of income, continue validating as normal.
- NO—If not, mark this application as “pending” and print a Subsequent Notice from Verification Tracking for the first application.



- Click  .

In the **Students** group of the Validation Workspace, the message:

“This student was selected for verification on application ###”

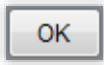
is shown when the cursor hovers over the caution icon.

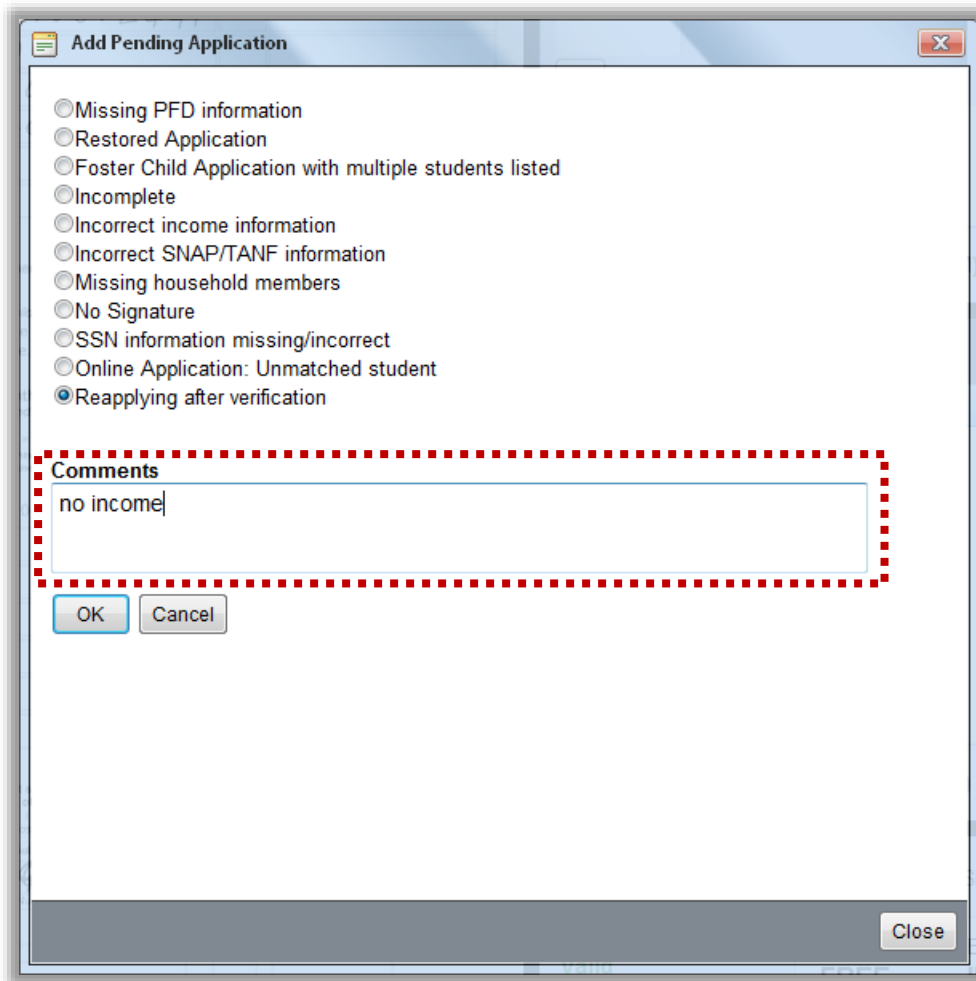
The screenshot displays the Primo - Validate application interface. The left pane shows a 'Free and Reduced-Price School Meals Household Application for 2010 - 2011' form for Application 217. The right pane shows a 'Students' table with a tooltip for student LONDON stating 'This student was selected for verification on application 217'. A red arrow points from the tooltip to the text above.

ID	Name	Site	Grade	SNAP/TAMP	Birth Date
	LONDON	201	PK		7/30/2006
	MACKENZIE	201	01		7/16/2004

* If Proof of Income *is provided*, the application is processed in the normal manner.

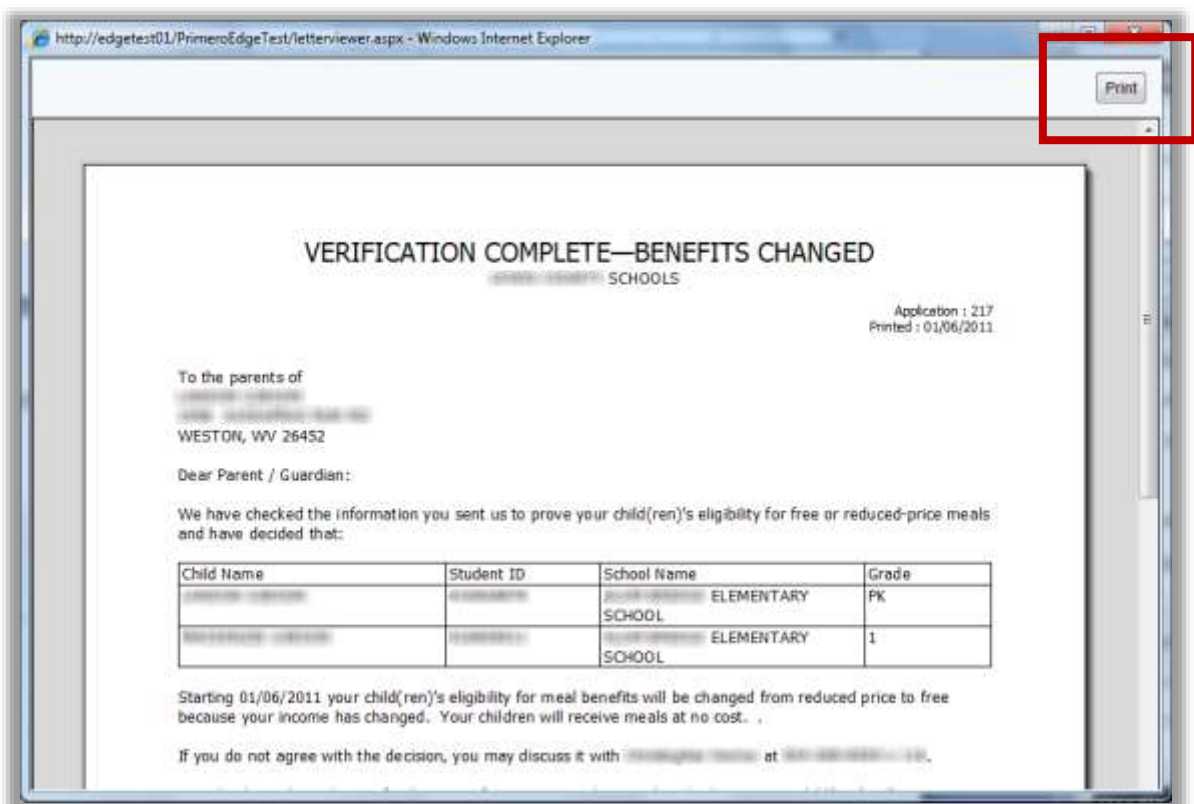
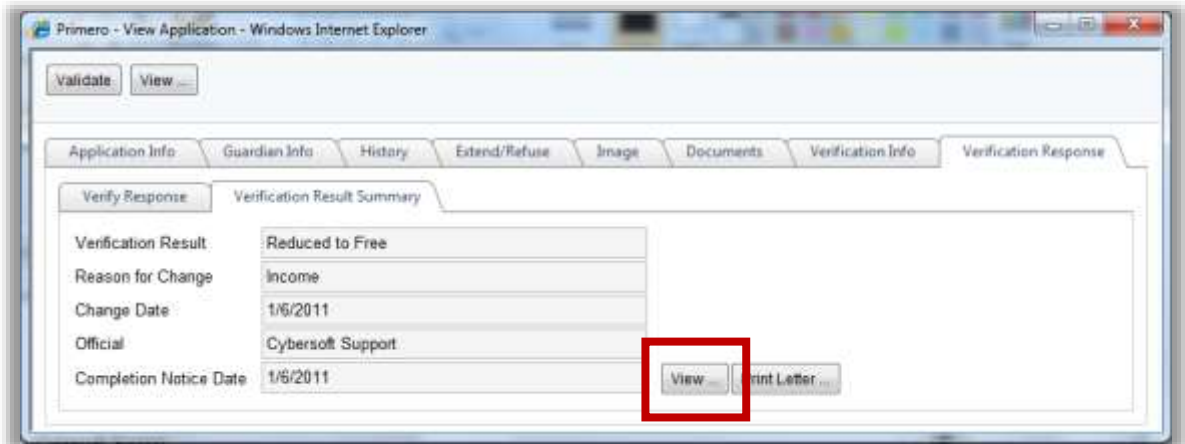
* If Proof of Income *is not provided*, click **Pending Application** in the Validation Workspace.

- Select “Reapplying after verification” and enter comment text in **Comments**.
- Click  .
- The new application is placed in the Smart Bin and processed as a pending application.
- A Follow Up notice letter is printed and sent to the parent/guardian requesting proof of income.



When verification is processed on the new application, the **Verification Result Summary** sub-tab indicates the new result.

- Click **View ...** to display the Verification Complete—Benefits Changed letter.
- Click **Print** in the report window.



<<End of Section>>

9

Configuration

In this section, you will learn how to:

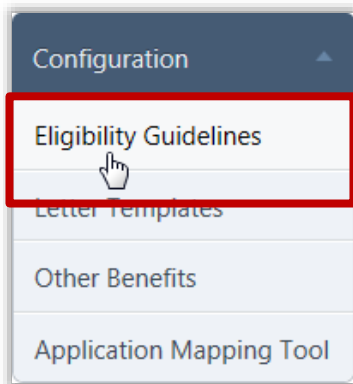
- ✓ Document eligibility for **Direct Approvals**.
- ✓ Extend benefits for Sibling Direct Approvals.
- ✓ Set and manage the **Grace Period**.
- ✓ Remind parents to reapply for benefits via **Grace Period Letters**.
- ✓ Generate Household Letters.
- ✓ View and update **Letter Templates**.
- ✓ View and update Temporary Approvals.
- ✓ View **Students** records.

Configuration at a Glance

Menu Function	Description
Eligibility Guidelines	View and update the Income Eligibility Guidelines established each year by the USDA for Free and Reduced Price meals.
Letter Templates	Create, view and update a template letter for a selected approval type
Other Benefits	Create and manage a list of benefits offered by the district, such as health insurance, or text book purchase
Application Mapping Tool	“Fine tune” your district’s application for Free and Reduced Price meals so that all required data is captured during application scan.

- ★ Note: Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Configuration** menu, you may see a subset of the functions listed above or you may not have access to all of the features for each menu selection.

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 (and Commodity School Program)
- School Breakfast Program
- Special Milk Program for Children
- Child and Adult Care Food Program
- 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 Page

 A screenshot of the 'Eligibility Guidelines' page in a web application. At the top, there are dropdown menus for 'Academic Year' (set to 2013 - 2014) and 'State Category' (set to Contiguous States), with an 'Apply' button. Below this is a section titled 'Eligibility Guidelines: 2013 - 2014 - Alaska' with 'Edit', 'Get Guidelines', and 'Generate Report' buttons. The main content is a table with columns for 'Household Size', 'Annual', 'Monthly', 'T-Month', 'E-2 Wks', and 'Weekly' for both 'Free Meals' and 'Reduced Price Meals'. The table lists income thresholds for household sizes 1 through 8, plus an additional member (+1*). Below the table is a section for 'Alaska PFD: 2013 - 2014' with an 'Edit' button and input fields for the years 2012 (878.00) and 2013 (300.00).

Household Size	Free Meals					Reduced Price Meals				
	Annual	Monthly	T-Month	E-2 Wks	Weekly	Annual	Monthly	T-Month	E-2 Wks	Weekly
1	\$18,655.00	\$1,555.00	\$778.00	\$718.00	\$339.00	\$25,548.00	\$2,213.00	\$1,107.00	\$1,022.00	\$311.00
2	\$25,194.00	\$2,100.00	\$1,050.00	\$969.00	\$485.00	\$35,853.00	\$2,988.00	\$1,494.00	\$1,379.00	\$400.00
3	\$31,733.00	\$2,645.00	\$1,323.00	\$1,231.00	\$611.00	\$45,159.00	\$3,764.00	\$1,882.00	\$1,737.00	\$509.00
4	\$38,272.00	\$3,190.00	\$1,595.00	\$1,472.00	\$736.00	\$54,464.00	\$4,539.00	\$2,270.00	\$2,095.00	\$604.00
5	\$44,811.00	\$3,735.00	\$1,868.00	\$1,734.00	\$862.00	\$63,770.00	\$5,315.00	\$2,658.00	\$2,453.00	\$727.00
6	\$51,350.00	\$4,280.00	\$2,140.00	\$1,975.00	\$988.00	\$73,075.00	\$6,090.00	\$3,045.00	\$2,811.00	\$840.00
7	\$57,889.00	\$4,825.00	\$2,413.00	\$2,227.00	\$1,114.00	\$82,381.00	\$6,866.00	\$3,433.00	\$3,169.00	\$958.00
8	\$64,428.00	\$5,369.00	\$2,685.00	\$2,478.00	\$1,239.00	\$91,686.00	\$7,641.00	\$3,821.00	\$3,527.00	\$1,064.00
+1*	\$6,539.00	\$545.00	\$273.00	\$252.00	\$126.00	\$9,306.00	\$776.00	\$388.00	\$358.00	\$119.00

* = Each Additional Member





Alaska PFD: 2013 - 2014

2012: 878.00 2013: 300.00

By default on the **Eligibility Guidelines** page:




- **Academic Year** is set to the current school year.
- **State Category** is set to “Contiguous States”.
- **Alaska PFD** section displays Permanent Fund Dividend (PFD) amounts (only applicable to Alaska) for the current year and previous year.

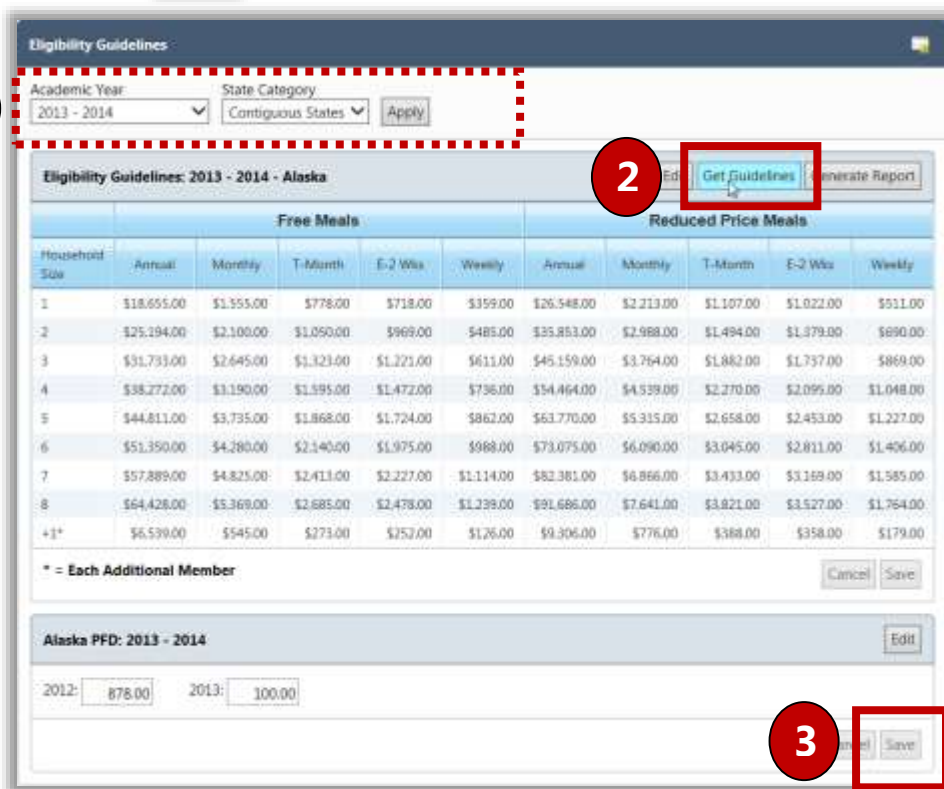
Page Functions

Button	Description
	Click to refresh the screen with data that matches the selected search conditions.
	Click to activate Edit mode to change Eligibility income limits on the Eligibility Guidelines page.
	Click to retrieve the most current Eligibility Guidelines available from the USDA for display on the Eligibility Guidelines page.
	Click to generate and display report of displayed Income Eligibility Guidelines.

❖ Note: Alaska is assigned a separate set of Income Eligibility Guidelines from the USDA. For Alaska users, “Alaska” must be selected for **State Category** before using any of the following procedures.

To retrieve Income Eligibility Guidelines from the USDA

1. Select an **Academic Year** and a **State Category**, if needed, and click  .
2. Click  .
3. Click  .



The screenshot shows the 'Eligibility Guidelines' configuration interface. A red dashed box labeled '1' highlights the 'Academic Year' (2013 - 2014) and 'State Category' (Contiguous States) dropdown menus and the 'Apply' button. A red box labeled '2' highlights the 'Get Guidelines' button. A red box labeled '3' highlights the 'Save' button at the bottom right of the page. The main table displays income limits for 'Free Meals' and 'Reduced Price Meals' across various household sizes (1-8 and +1*) and meal frequencies (Annual, Monthly, T-Monthly, E-2 Wks, Weekly). Below the table, there is a section for 'Alaska PFD: 2013 - 2014' with input fields for 2012 (878.00) and 2013 (100.00) values.

To edit income guidelines

1. Select an **Academic Year** and a **State Category**, if needed click .
2. Click .
3. Enter new income values for **Free Meals** or **Reduced Price Meals** as needed.
4. Click .

Eligibility Guidelines

Academic Year: 2013 - 2014 | State Category: Contiguous States |

Eligibility Guidelines: 2013 - 2014 - Contiguous States


Household Size	Free Meals					Reduced Price Meals				
	Annual	Monthly	T-Month	E-2 Wks	Weekly	Annual	Monthly	T-Month	E-2 Wks	Weekly
1	\$14,937.00	\$1,245.00	\$623.00	\$575.00	\$288.00	\$21,257.00	\$1,772.00	\$886.00	\$818.00	\$409.00
2	\$20,163.00	\$1,681.00	\$841.00	\$776.00	\$388.00	\$28,694.00	\$2,392.00	\$1,196.00	\$1,104.00	\$552.00
3	\$25,389.00	\$2,116.00	\$1,058.00	\$977.00	\$489.00	\$36,131.00	\$3,011.00	\$1,506.00	\$1,390.00	\$695.00
4	\$30,615.00	\$2,552.00	\$1,276.00	\$1,178.00	\$589.00	\$43,568.00	\$3,631.00	\$1,816.00	\$1,676.00	\$838.00
5	\$35,841.00	\$2,987.00	\$1,494.00	\$1,379.00	\$690.00	\$51,005.00	\$4,251.00	\$2,126.00	\$1,962.00	\$981.00
6	\$41,067.00	\$3,423.00	\$1,712.00	\$1,580.00	\$790.00	\$58,442.00	\$4,871.00	\$2,436.00	\$2,248.00	\$1,124.00
7	\$46,293.00	\$3,858.00	\$1,929.00	\$1,781.00	\$891.00	\$65,879.00	\$5,490.00	\$2,745.00	\$2,534.00	\$1,267.00
8	\$51,519.00	\$4,294.00	\$2,147.00	\$1,982.00	\$991.00	\$73,316.00	\$6,110.00	\$3,055.00	\$2,820.00	\$1,410.00
+1*	\$5,226.00	\$436.00	\$218.00	\$201.00	\$101.00	\$7,437.00	\$620.00	\$310.00	\$287.00	\$144.00

* = Each Additional Member

Alaska PFD: 2013 - 2014

2012: 878.00 | 2013: 100.00

To generate and print Eligibility Guidelines

1. Select a **State Category**, if needed, and click .
2. Click .
3. Click **Print** ().

Letter Templates

Letter Templates offers nine categories of template letters which can be edited and sent to families via mail or direct hand-out. Template letters include:

- Direct Approval
- Direct Certification
- Grace Period Expiration
- Mailing Labels
- Approval/Denial Notice
- Letter to Household
- Verification Notice
- Verification Subsequent Notice
- Verification Completion Notice
- Verification Change Notice

Each template can include free-form text, text fields and table fields.


Letter Templates Page



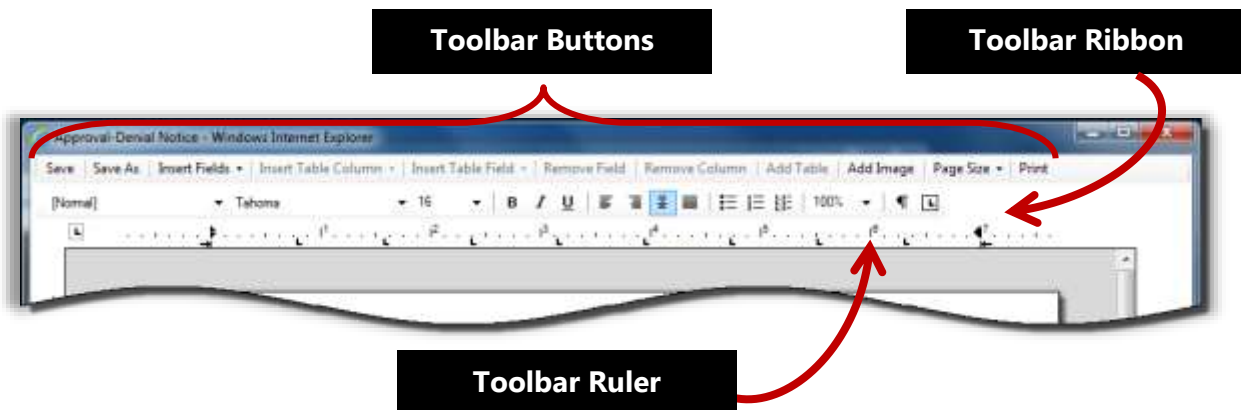
By default on the **Letter Templates** page:

- **Letter Type** is set to “Direct Approval”.
- **Language** is set to “English”.


Page Functions

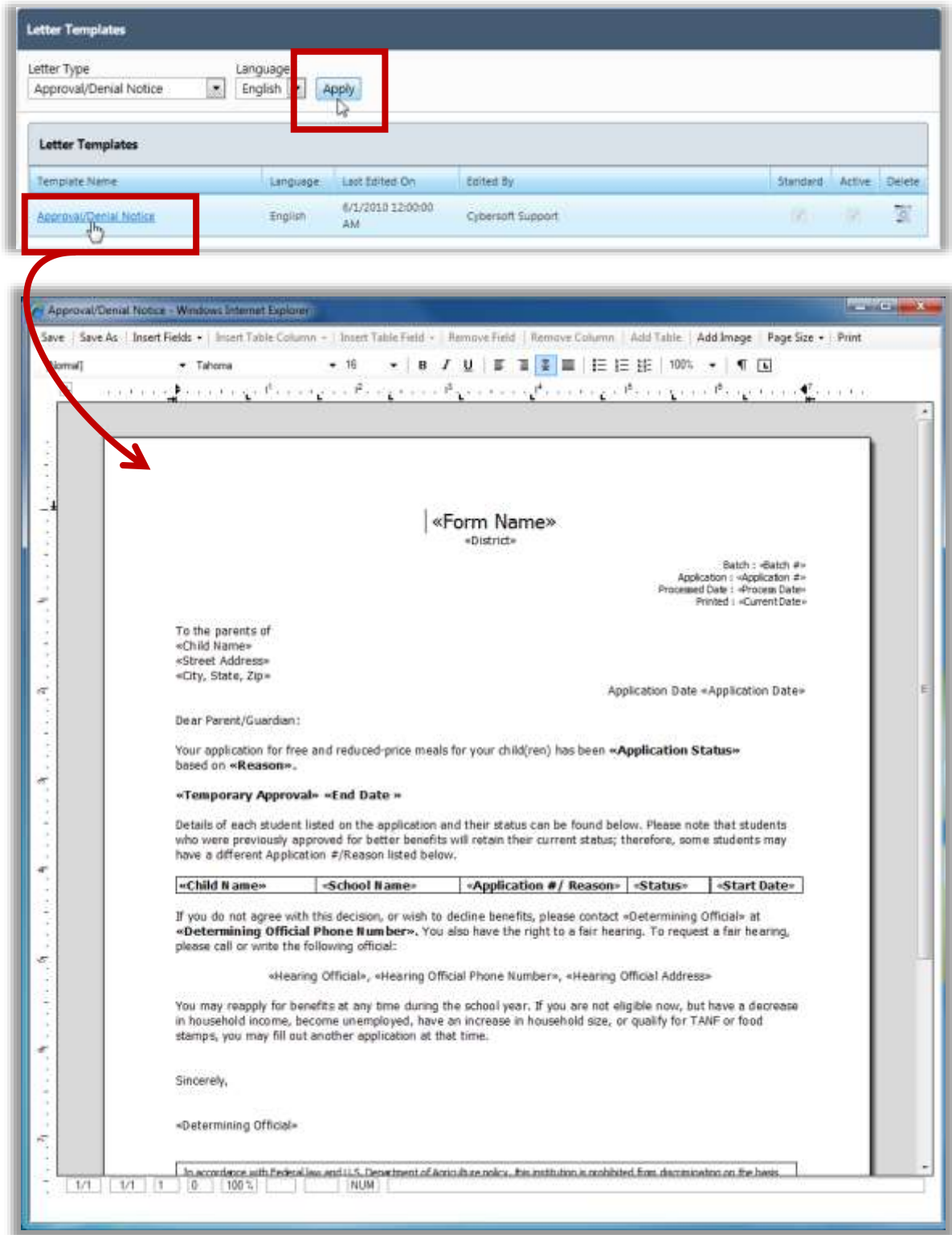
Button	Description
	Click to display a list of letter templates that match the selected conditions.

Letter Templates Toolbar



To view a letter template

1. Select a **Letter Type** and click .
2. Click a [Template Name](#) link.



The screenshot shows the 'Letter Templates' configuration interface. At the top, there are dropdown menus for 'Letter Type' (set to 'Approval/Denial Notice') and 'Language' (set to 'English'). An 'Apply' button is highlighted with a red box. Below this is a table of letter templates. The first row is highlighted with a red box, and a red arrow points from it to the preview window below.

Template Name	Language	Last Edited On	Edited By	Standard	Active	Delete
Approval/Denial Notice	English	6/1/2010 12:00:00 AM	Cybersoft Support	<input type="checkbox"/>	<input type="checkbox"/>	

The preview window shows a letter template with the following content:

«Form Name»
«District»

Batch : «Batch #»
Application : «Application #»
Processed Date : «Process Date»
Printed : «Current Date»

To the parents of
«Child Name»
«Street Address»
«City, State, Zip»

Application Date «Application Date»

Dear Parent/Guardian:

Your application for free and reduced-price meals for your child(ren) has been «Application Status» based on «Reason».

«Temporary Approval» «End Date »

Details of each student listed on the application and their status can be found below. Please note that students who were previously approved for better benefits will retain their current status; therefore, some students may have a different Application #/Reason listed below.

«Child Name»	«School Name»	«Application # / Reason»	«Status»	«Start Date»

If you do not agree with this decision, or wish to decline benefits, please contact «Determining Official» at «Determining Official Phone Number». You also have the right to a fair hearing. To request a fair hearing, please call or write the following official:

«Hearing Official», «Hearing Official Phone Number», «Hearing Official Address»

You may reapply for benefits at any time during the school year. If you are not eligible now, but have a decrease in household income, become unemployed, have an increase in household size, or qualify for TANF or food stamps, you may fill out another application at that time.


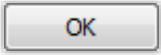
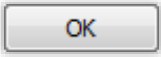
Sincerely,

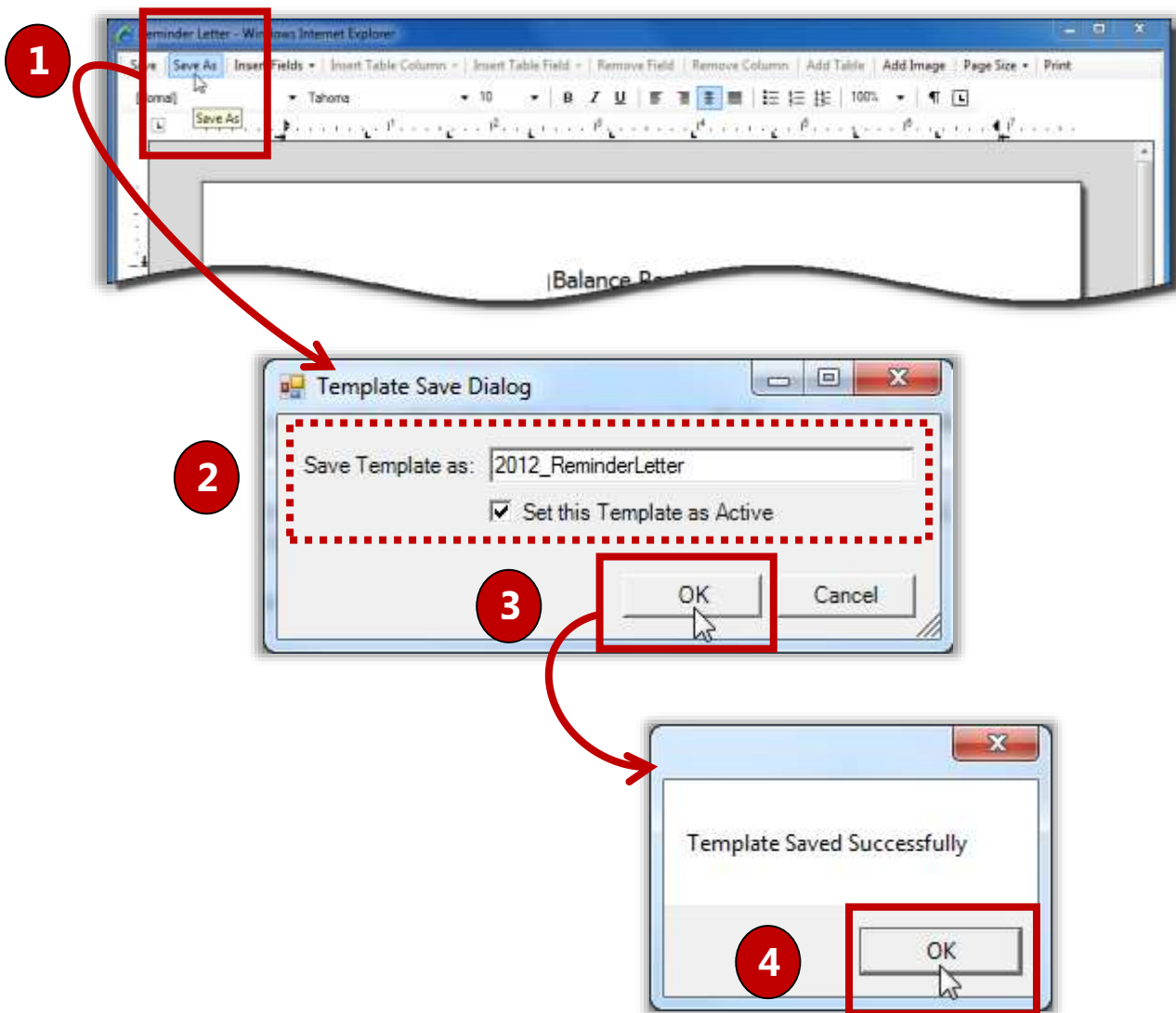
«Determining Official»

In accordance with Federal law and U.S. Department of Agriculture policy, this institution is prohibited from discriminating on the basis of race, sex, or age.



1/1 1/1 1 0 100% NUM

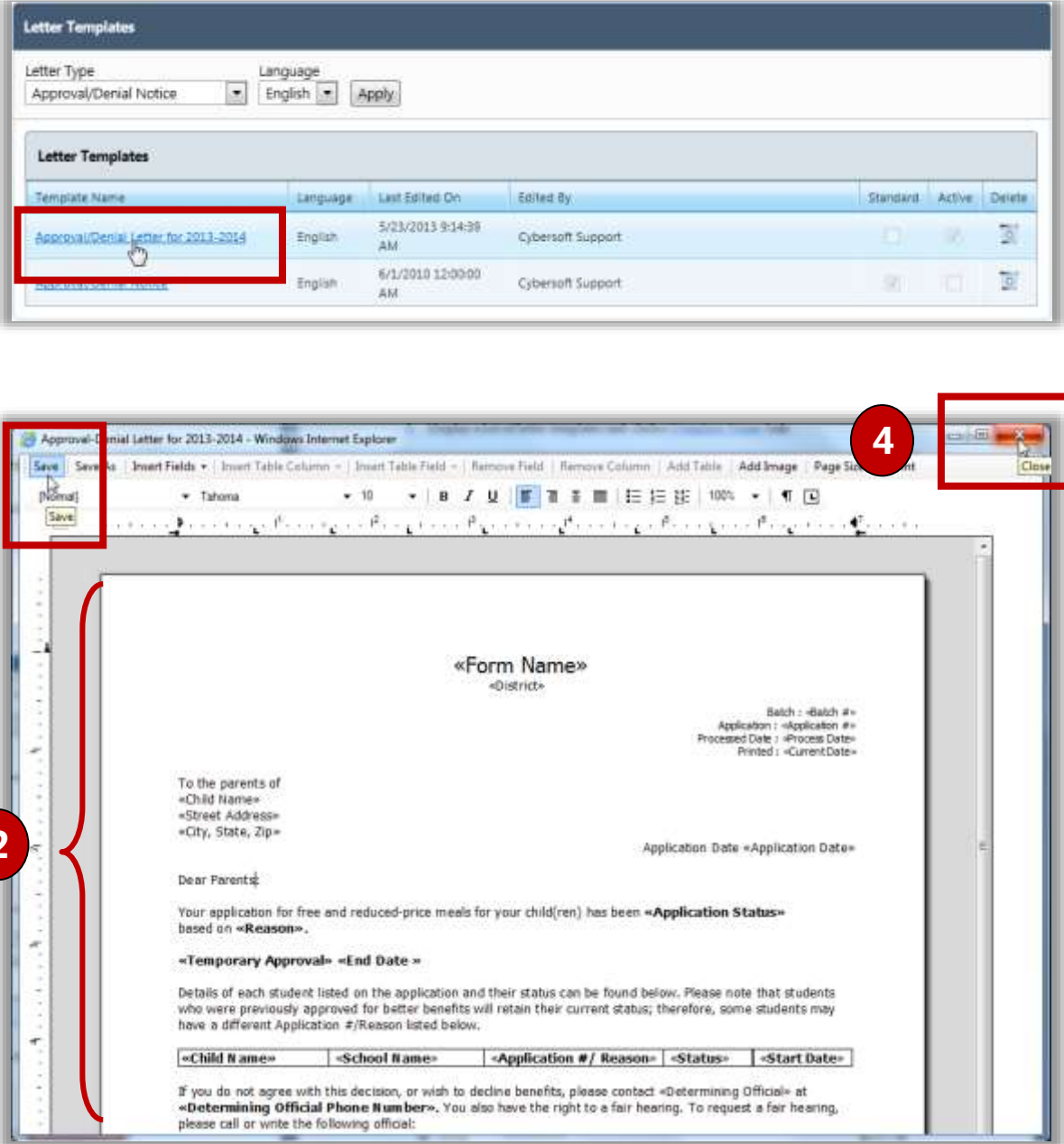
To add a custom template letter

1. Display a template and click .
2. Enter a name for the new template and select **Set this Template as Active** if the template is to be the current letter used for notification.
 - ⚠ Caution! Do not use special characters in the template name. Using special characters disables the template editor.
 - ★ Note: Only one letter in a template category can be “active”.
3. Click  in the **Template Save** popup.
4. Click  in the **Successful Save** popup.



To edit a custom template letter

1. Display a list of letter templates and click a [Template Name](#) link.
2. Make changes, as needed.
3. Click  to save changes and
4. Click  to close the letter template window.



The image shows two screenshots illustrating the process of editing a custom template letter.

Top Screenshot: Letter Templates List

The interface shows a "Letter Templates" window with filters for "Letter Type" (Approval/Denial Notice) and "Language" (English). A table lists the templates:

Template Name	Language	Last Edited On	Edited By	Standard	Active	Delete
Approval/Denial Letter for 2013-2014	English	5/23/2013 9:14:38 AM	Cybersoft Support	<input type="checkbox"/>	<input type="checkbox"/>	
Approval/Denial Notice	English	6/1/2010 12:00:00 AM	Cybersoft Support	<input type="checkbox"/>	<input type="checkbox"/>	

A red circle with the number "1" is next to the first row, which is highlighted with a red box.

Bottom Screenshot: Letter Template Editor

The editor window shows a rich text editor with a "Save" button (circled with a red "3") and a "Close" button (circled with a red "4"). The letter content includes:

«Form Name»
«District»

Batch : «Batch #»
Application : «Application #»
Processed Date : «Process Date»
Printed : «Current Date»

To the parents of
«Child Name»
«Street Address»
«City, State, Zip»

Application Date «Application Date»

Dear Parents:

Your application for free and reduced-price meals for your child(ren) has been «Application Status» based on «Reason».

«Temporary Approval» «End Date»


Details of each student listed on the application and their status can be found below. Please note that students who were previously approved for better benefits will retain their current status; therefore, some students may have a different Application #/Reason listed below.

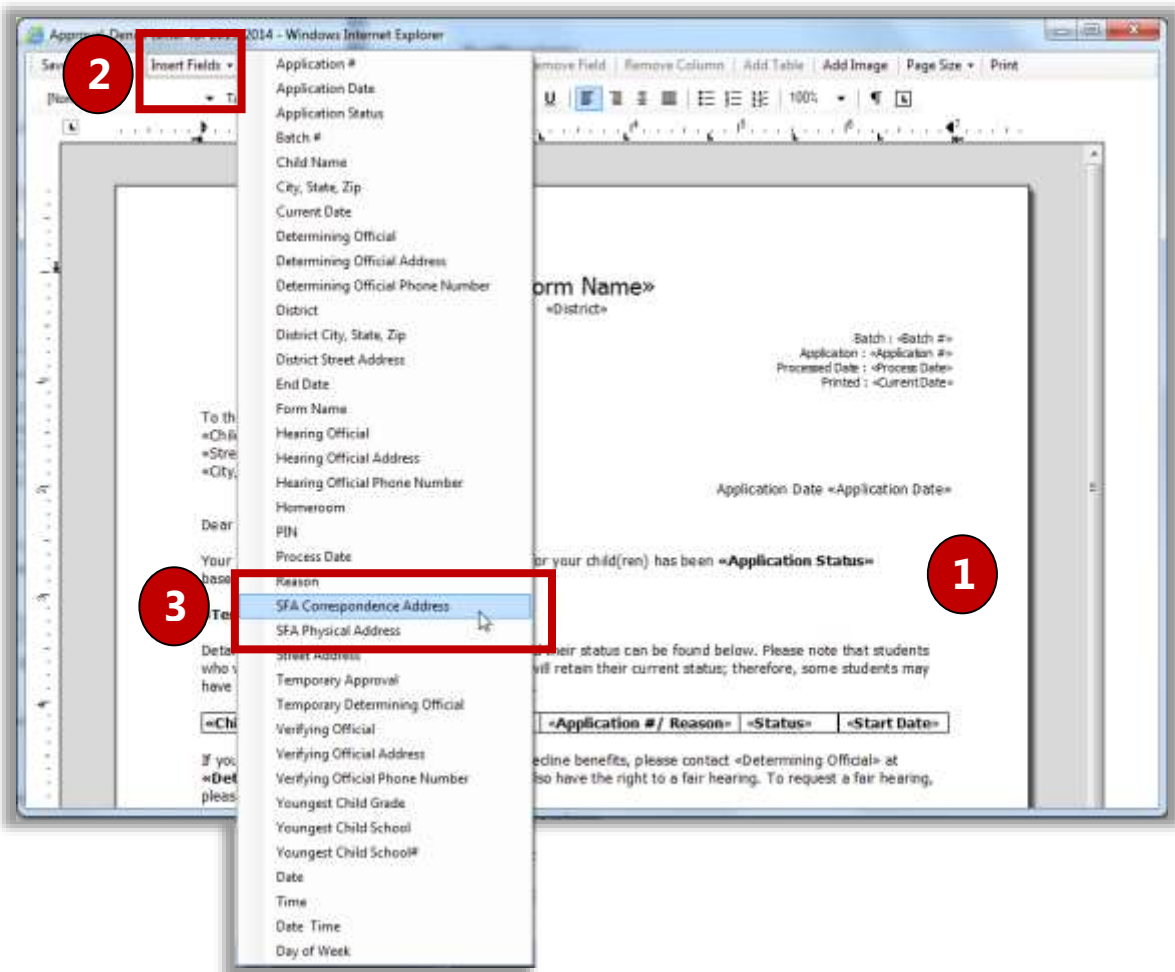
«Child Name»	«School Name»	«Application #/ Reason»	«Status»	«Start Date»

If you do not agree with this decision, or wish to decline benefits, please contact «Determining Official» at «Determining Official Phone Number». You also have the right to a fair hearing. To request a fair hearing, please call or write the following official:

Working With Data Fields

To insert a data field

1. Place the cursor where the new field is to appear.
2. Click  .
3. Select the field to insert on the drop-down list.



To remove a data field

1. Highlight the field to remove.
2. Click  .

⚠ Caution! Using **Delete** on the keyboard does not remove the field from the letter—it simply removes it from the display.

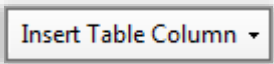
Working with Tables

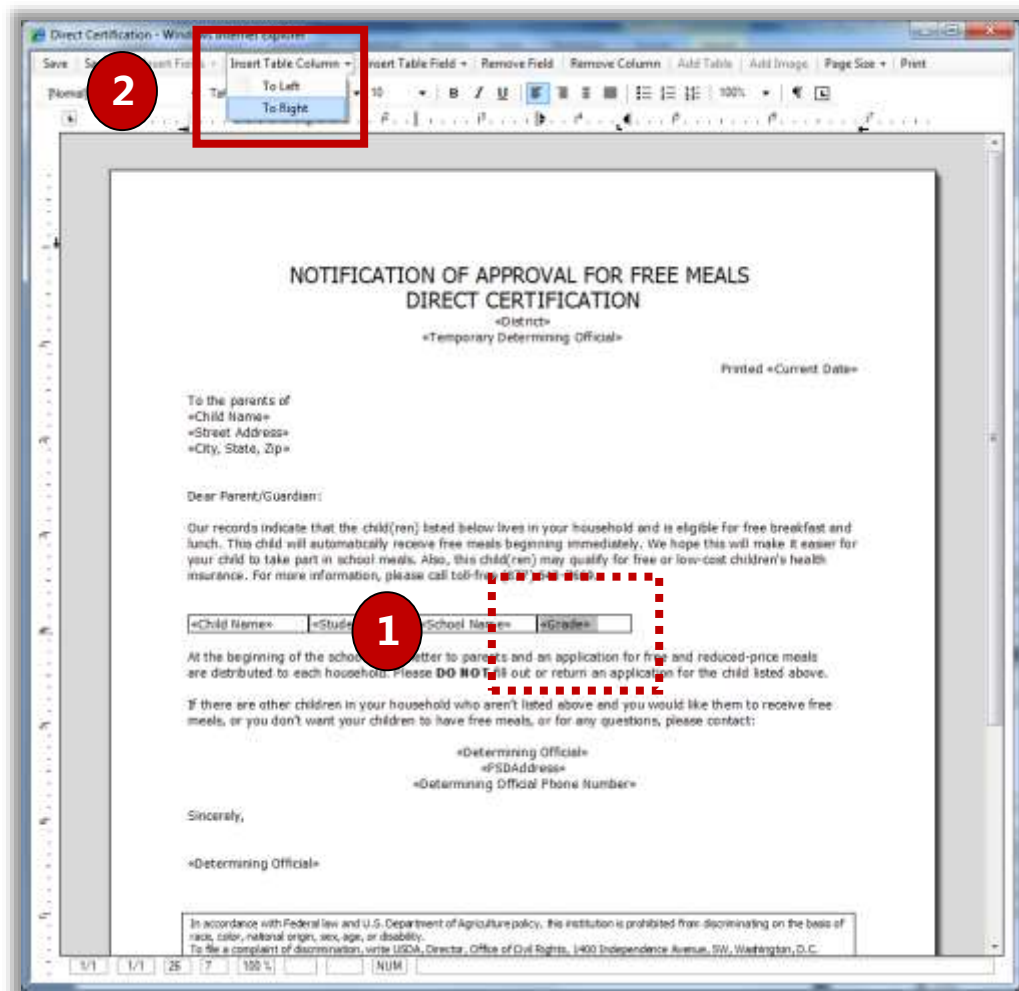
Table use guidelines include:

- Each of the standard forms in each category includes one table. Only **one table is allowed** on an individual form.
- Clicking inside the table activates the four table buttons on the template menu bar.
- Table columns can be resized by moving the column separators with the mouse.


To add a table column

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

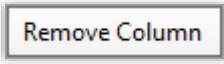
1. Place the cursor in a column to the left or right of where the column is to be inserted.
2. Click  and select one option from the drop-down list.



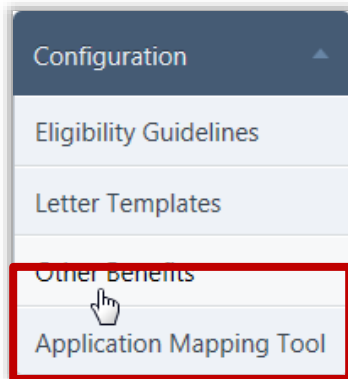
To add a table field to a column

1. Place the cursor inside a column.
2. Click  and select a field from the drop-down list.

To remove a table column

1. Place the cursor in the column to be removed.
2. Click  .

Other Benefits



Other Benefits manages benefits displayed on the **Review Application** page of the Free & Reduced Meals Online Applications web site. These are benefits offered by your district about which parents may be interested in receiving more information.

Other Benefits Page

 A screenshot of the 'Other Benefits' page in a web application. The page has a dark blue header with the title 'Other Benefits'. Below the header is a toolbar with a '+ Add new record' button and a 'Refresh' button. The main content is a table with the following columns: Name, Description, Spanish Description, School Year, and Delete. The table contains three rows of data:

Name	Description	Spanish Description	School Year		Delete
Text Books	Text Books	Text Books	2012 - 2013		
Health Insurance	Health Insurance	Health Insurance	2012 - 2013		
Bus Fare	Bus Fare	Bus Fare	2012 - 2013		

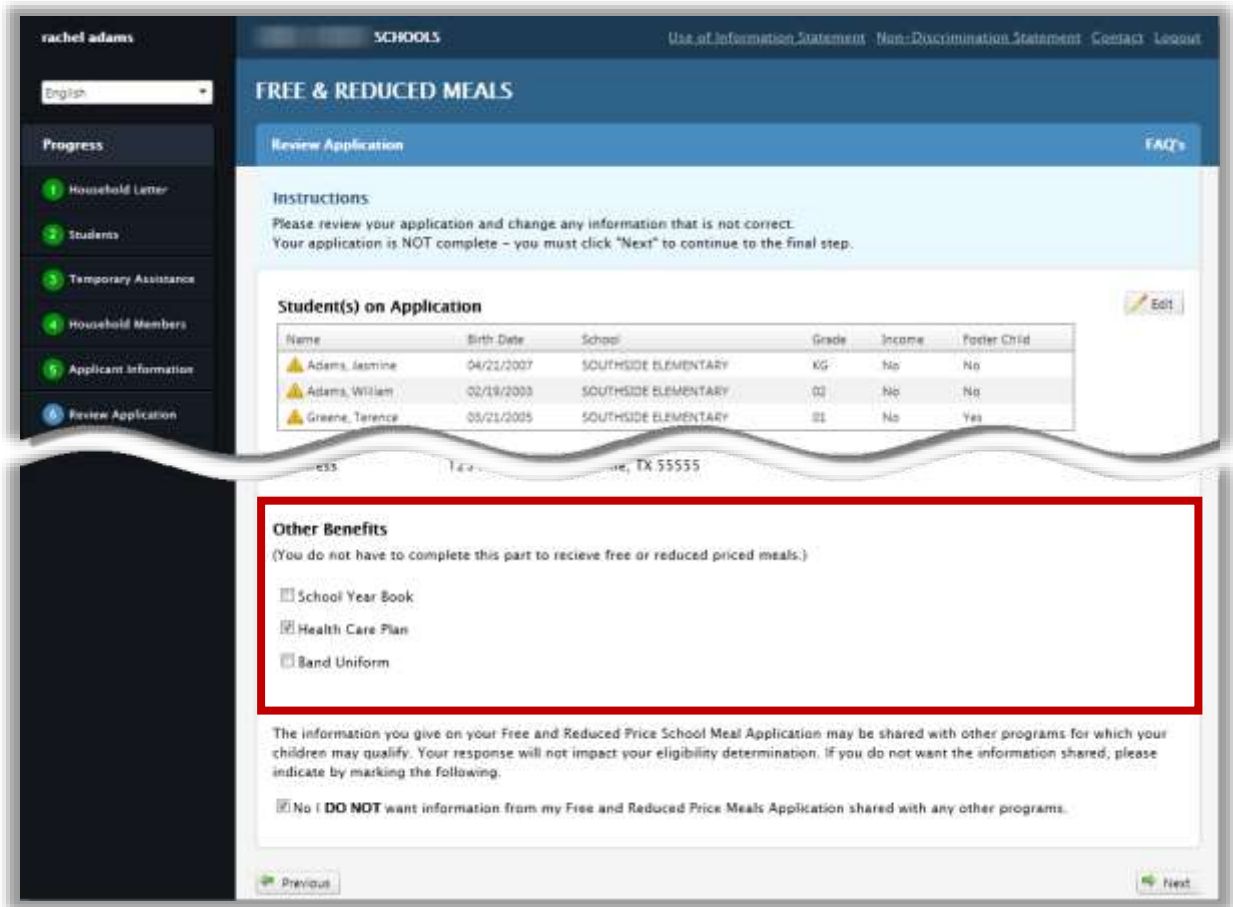
By default on the **Other Benefits** page:

- All existing benefits are listed.


Page Functions

Button/Link	Description
 (Edit)	Click to update a benefit name, description or effective school year.
 (Delete)	Click to remove the benefit; removing the benefit through this menu selection also removes the display of the benefit on the web page.

Other Benefits Display




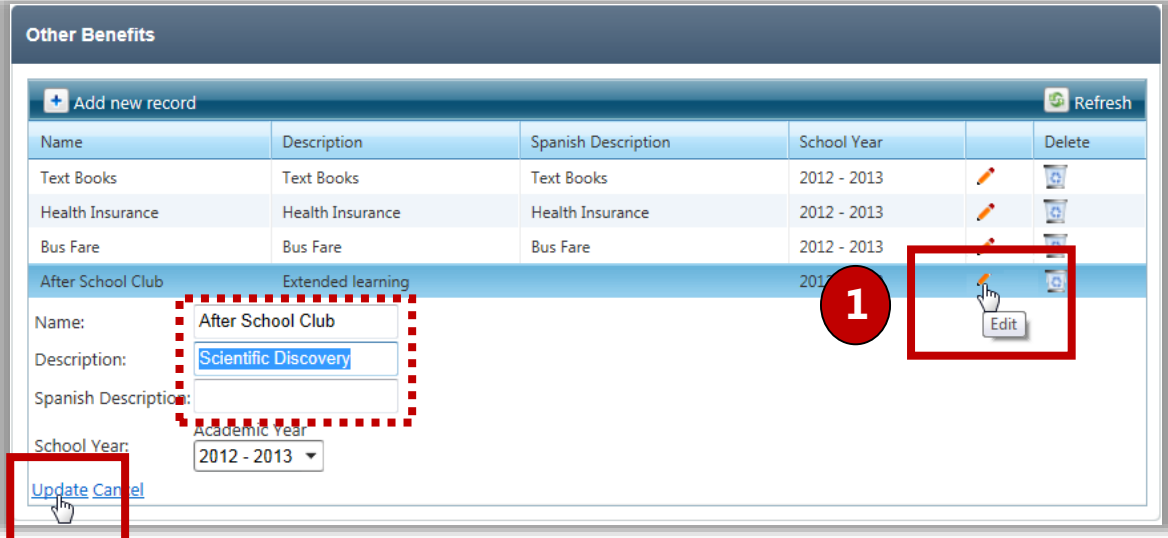
To add a new benefit

1. Click  .
2. Enter a **Name** and a short **Description**.
3. Click [Insert](#).



To update a benefit

1. Click **Edit** () in a benefit listing.
2. Make changes to benefit information as needed.
3. Click [Update](#).




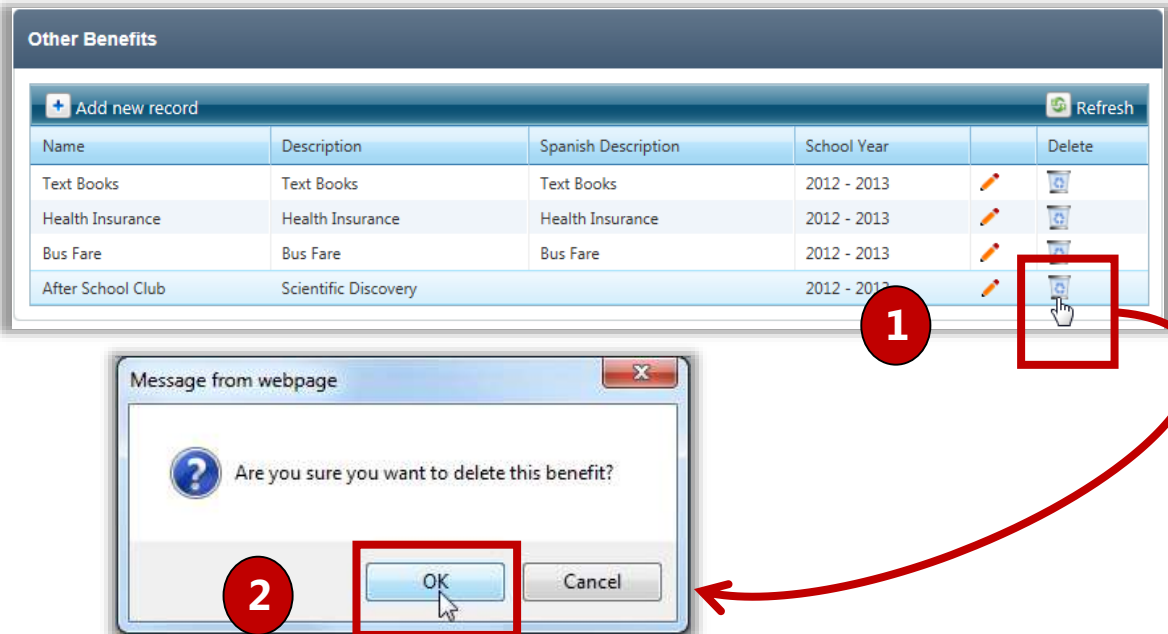
The screenshot shows the 'Other Benefits' interface. A table lists benefits: Text Books, Health Insurance, Bus Fare, and After School Club. The 'After School Club' row is selected, and the 'Edit' button (pencil icon) is highlighted with a red box and a red circle labeled '1'. Below the table, the form for 'After School Club' is shown. The 'Description' field contains 'Scientific Discovery' and is highlighted with a red dashed box and a red circle labeled '2'. The 'Update' button is highlighted with a red box and a red circle labeled '3'.

Name	Description	Spanish Description	School Year		Delete
Text Books	Text Books	Text Books	2012 - 2013		
Health Insurance	Health Insurance	Health Insurance	2012 - 2013		
Bus Fare	Bus Fare	Bus Fare	2012 - 2013		
After School Club	Extended learning		2012 - 2013		

Form fields for 'After School Club':
 Name: After School Club
 Description: Scientific Discovery
 Spanish Description:
 School Year: Academic Year 2012 - 2013
 Buttons: Update, Cancel

To delete a benefit

1. Click **Delete** () in a benefit listing.
2. Click in the **Message** popup.

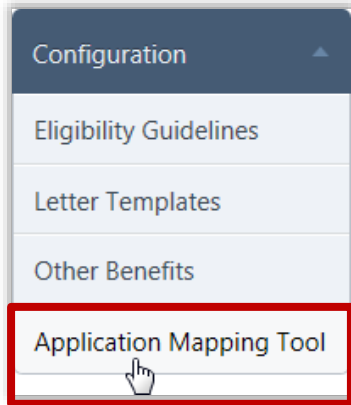


The screenshot shows the 'Other Benefits' interface. The 'After School Club' row is selected, and the 'Delete' button (trash icon) is highlighted with a red box and a red circle labeled '1'. Below the table, a 'Message from webpage' popup is shown. The popup contains the question 'Are you sure you want to delete this benefit?' and two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box and a red circle labeled '2'.

Name	Description	Spanish Description	School Year		Delete
Text Books	Text Books	Text Books	2012 - 2013		
Health Insurance	Health Insurance	Health Insurance	2012 - 2013		
Bus Fare	Bus Fare	Bus Fare	2012 - 2013		
After School Club	Scientific Discovery		2012 - 2013		

Message from webpage:
 Are you sure you want to delete this benefit?
 Buttons: OK, Cancel

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 includes three tabs:

- **Template** – lists all currently existing application images; provides a method to create a template from a last scanned application
 - ★ Note: The 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.

Application Mapping Tool



By default on the **Application Mapping Tool** page:

- All scanned application templates are listed on the **Template** tab.

Page Functions

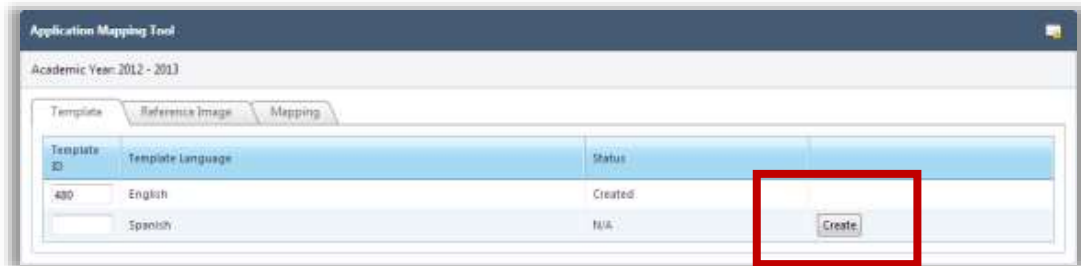
Button	Description
<input type="button" value="Create"/>	Click to create a template of the last scanned application.

Tab 1: Template

A mapping image is created on the **Template** tab from an existing application, i.e., such as when the same application from a previous year will be used for the new school year.


To add a template

- Click the **Template** tab and click in a 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.

-  **Note:** 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 .



To view details of an application image

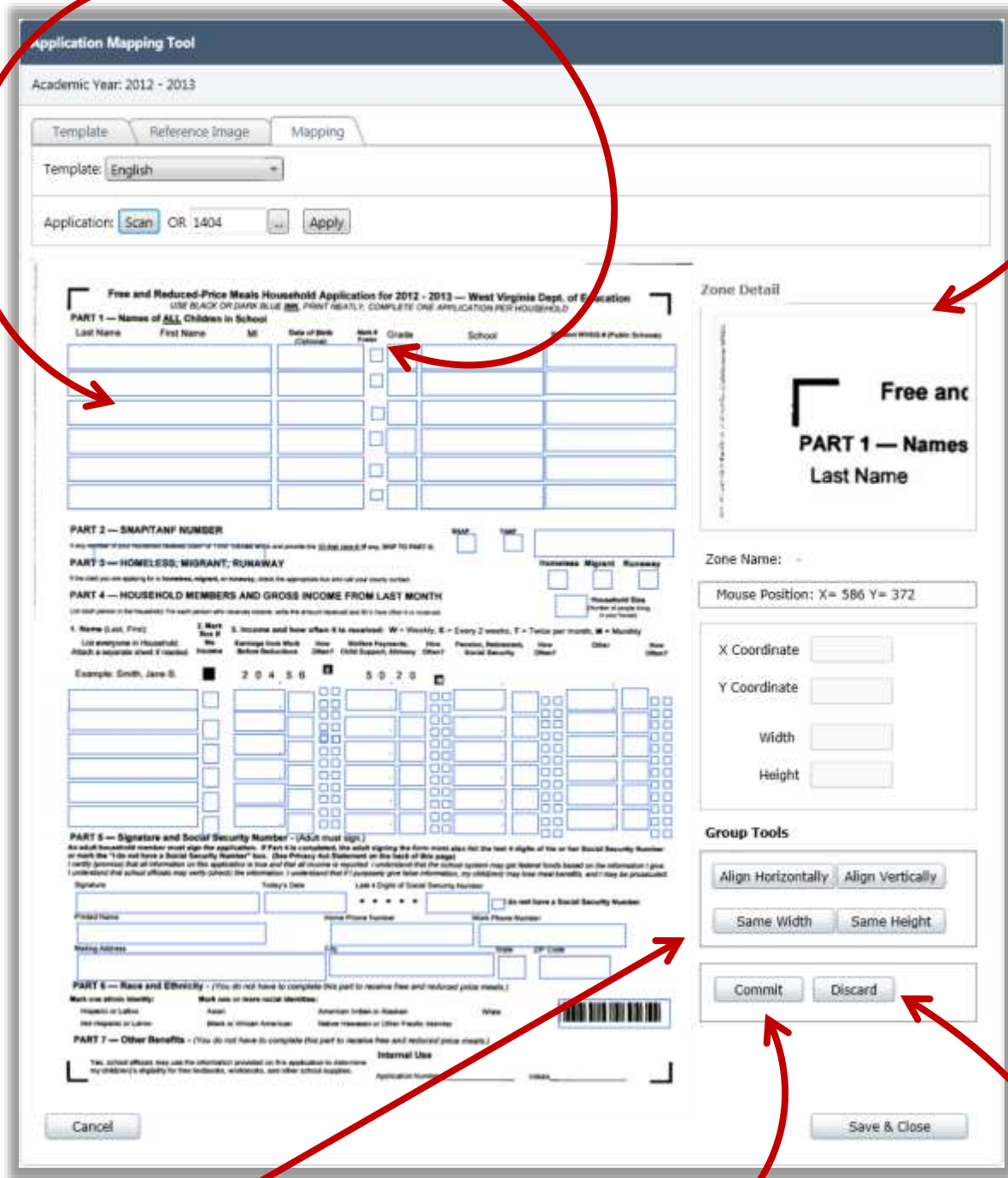
- Select a **Template** and click .
- Hover the mouse cursor over the image to zoom-in.

Tab 3: Mapping

Mapping of the various areas of the application image takes place on the **Mapping** tab.

Blue boxes are mapped data areas that are read and saved by PrimeroEdge

Zone Detail magnifies the area where the mouse cursor is located.



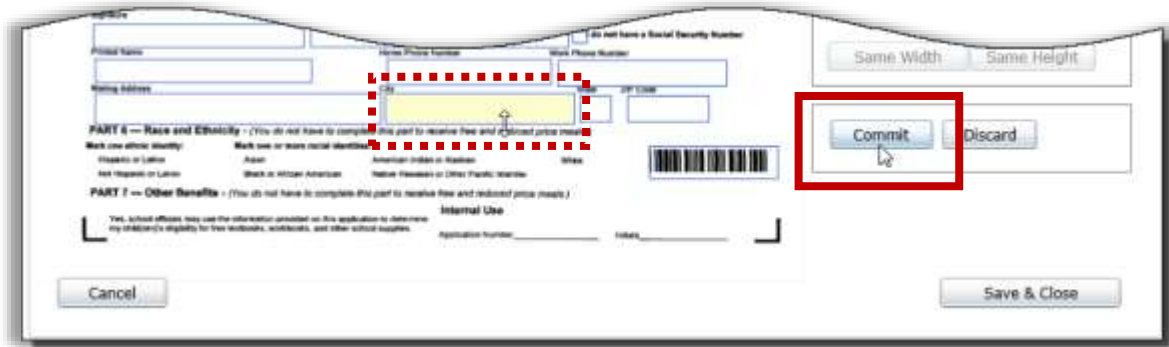
Group Tools modify two or more selected map boxes

Click to save your last set of changes

Click to cancel your last set of changes

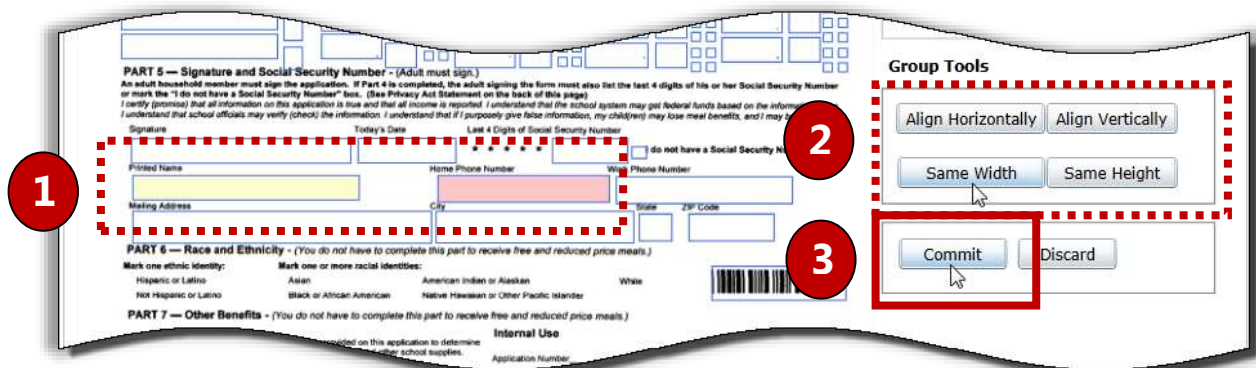
To increase or decrease the size of the mapped box

1. Click inside the mapped box and click and drag the edge of the mapped box to expand or decrease the mapped box size.
2. Commit or Discard your changes.

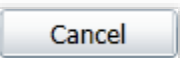


To work with Group Tools

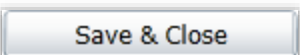
1. Select two or more boxes with the mouse while holding down the Ctrl key.
2. Click a group tool to change the size or vertical/horizontal location of all mapped boxes **relative to the first selected box**.
3. Commit or Discard your changes.



To discard all changes and close the mapped image

- Click  .

To save all changes and close the mapped image

- Click  .

<<End of Section>>

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