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PrimeroEdge Food Service Solutions
PrimeroEdge Student Eligibility User Guide

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1

Online Applications

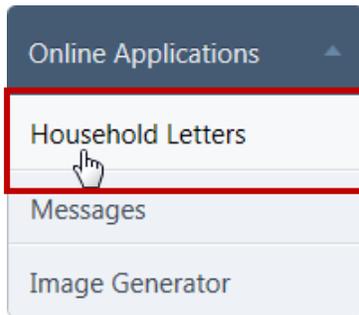
In this section, you will learn how to:

- ✓ 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.

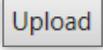
By default, on the **Household Letters** page:

- **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 a section titled 'Add New Letter' 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	

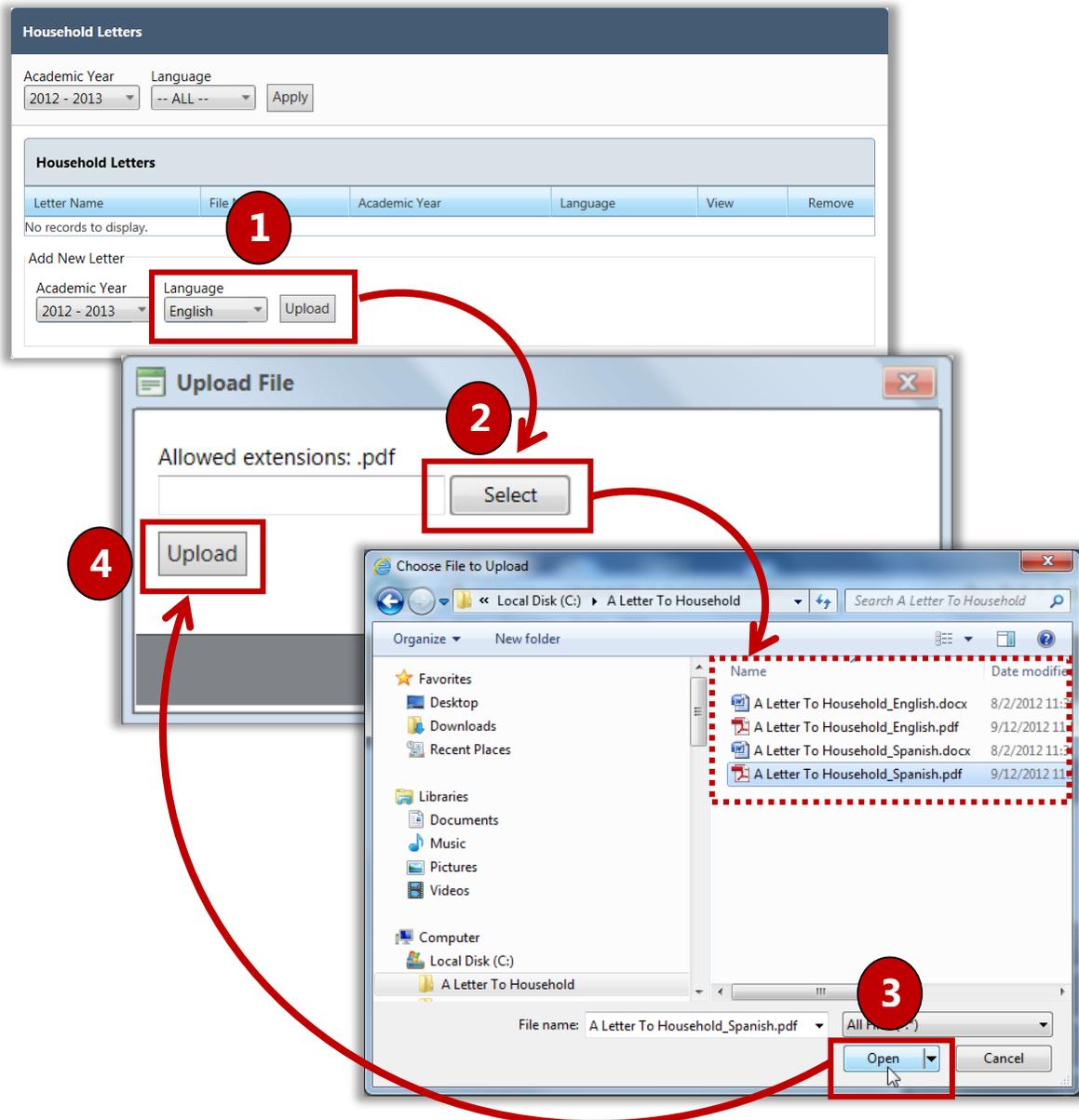
Header	Data Type	Description
Letter Name	<i>View only</i>	Static text for all letters
File Name	<i>View only</i>	Complete name of letter file
Academic Year	<i>View only</i>	Year to which the letter pertains
Language	<i>View only</i>	Language version of the letter
View	Clickable link	Click to view the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



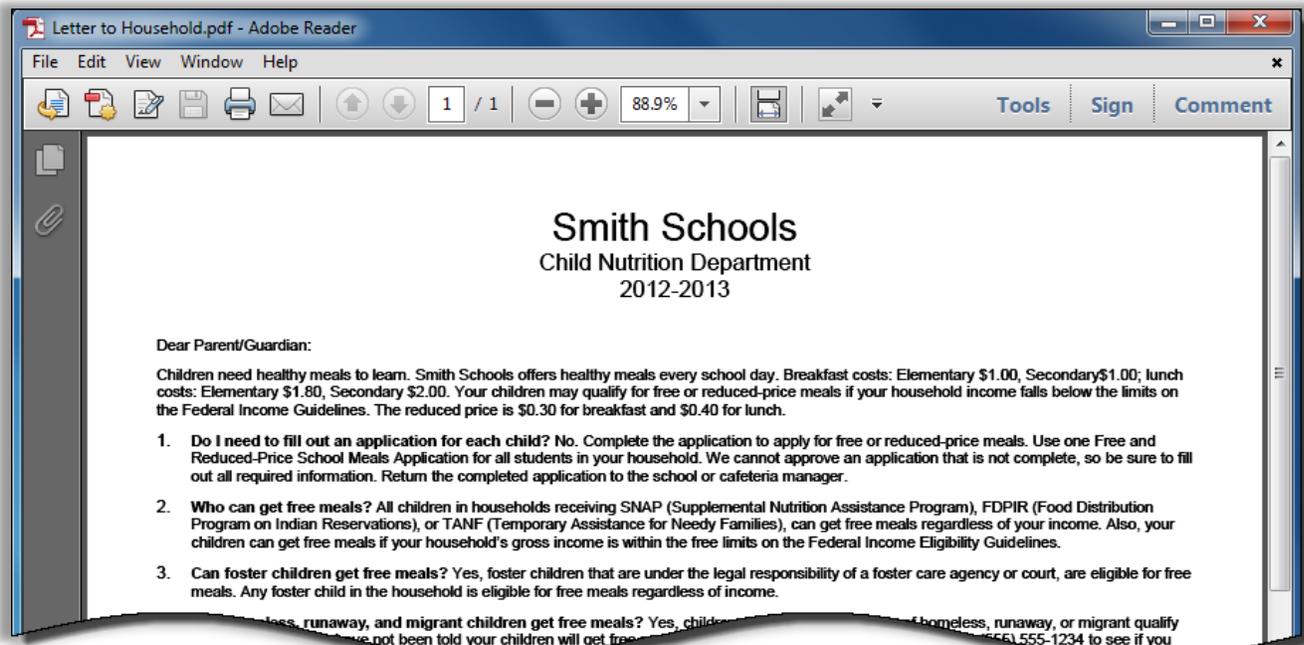
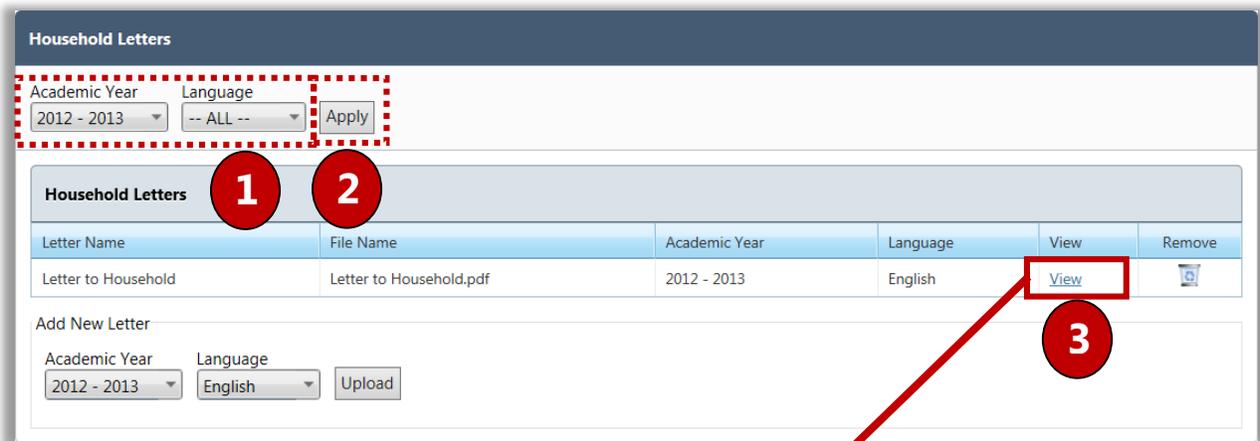
Viewing a Household Letter

To view a Household Letter

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

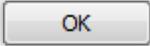
2.) Click .

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

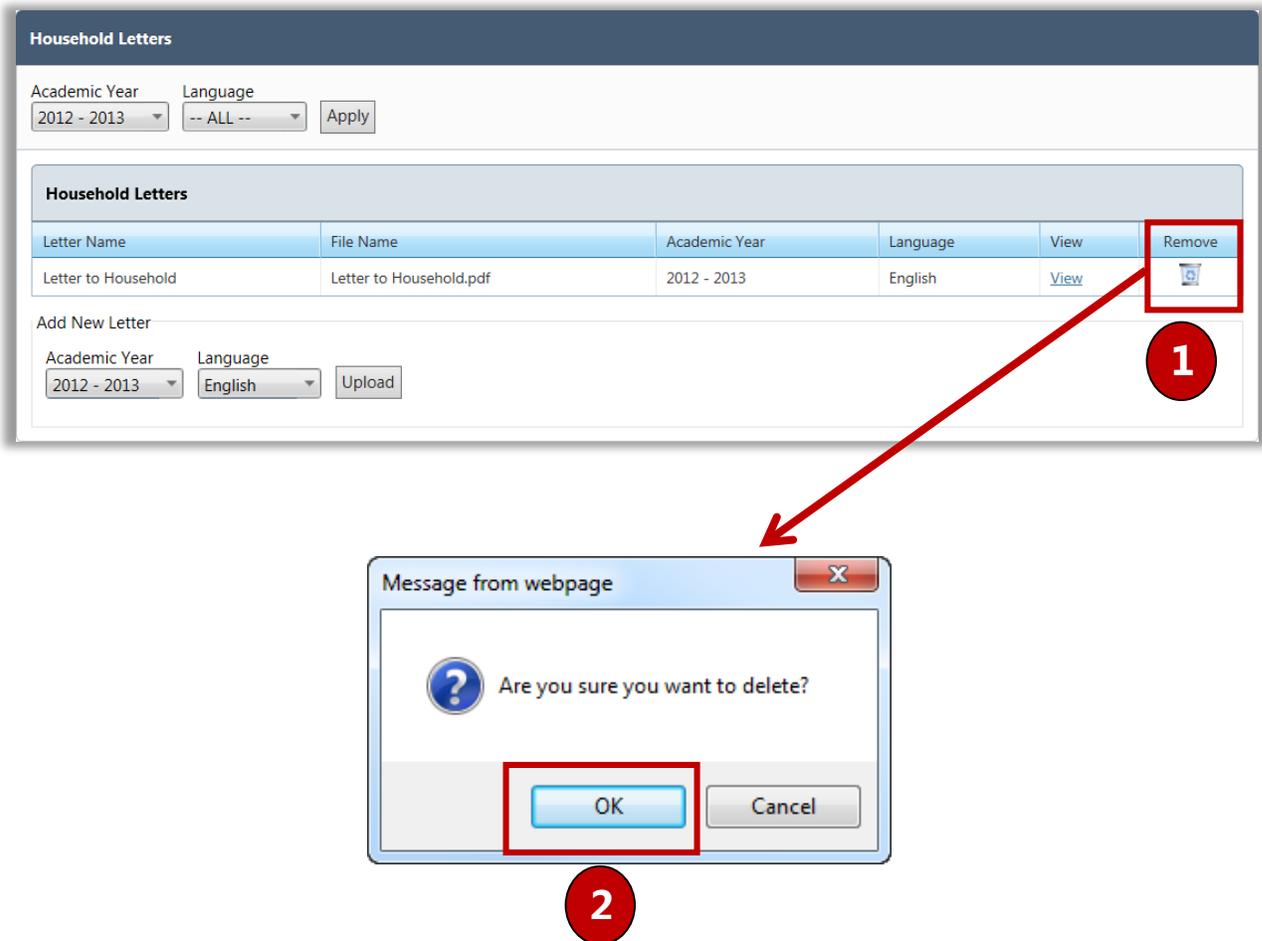


Removing a Household Letter

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.



The screenshot shows the 'Household Letters' interface. At the top, there are filters for 'Academic Year' (2012 - 2013) and 'Language' (-- ALL --), with an 'Apply' button. Below this is a table with the following columns: Letter Name, File Name, Academic Year, Language, View, and Remove. The first row contains: Letter to Household, Letter to Household.pdf, 2012 - 2013, English, [View](#), and a 'Remove' button with a trash icon. A red box highlights the 'Remove' button, and a red arrow points from it to a confirmation dialog box. The dialog box is titled 'Message from webpage' and contains the text 'Are you sure you want to delete?' with a question mark icon. At the bottom of the dialog box, there are two buttons: 'OK' and 'Cancel'. A red box highlights the 'OK' button, and a red circle with the number '2' is placed below it. A red circle with the number '1' is placed next to the 'Remove' button in the table.

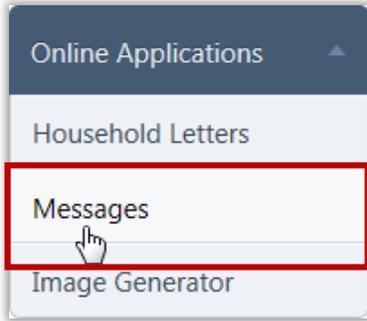
Letter Name	File Name	Academic Year	Language	View	Remove
Letter to Household	Letter to Household.pdf	2012 - 2013	English	View	

Message from webpage

Are you sure you want to delete?

OK Cancel

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.

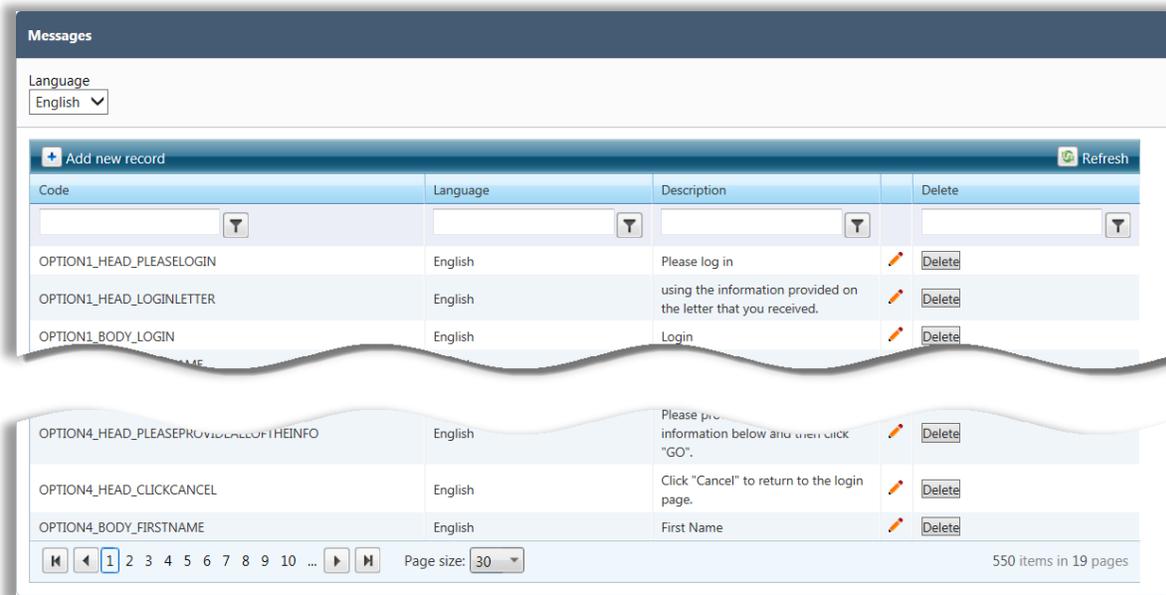
 **Note**

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:

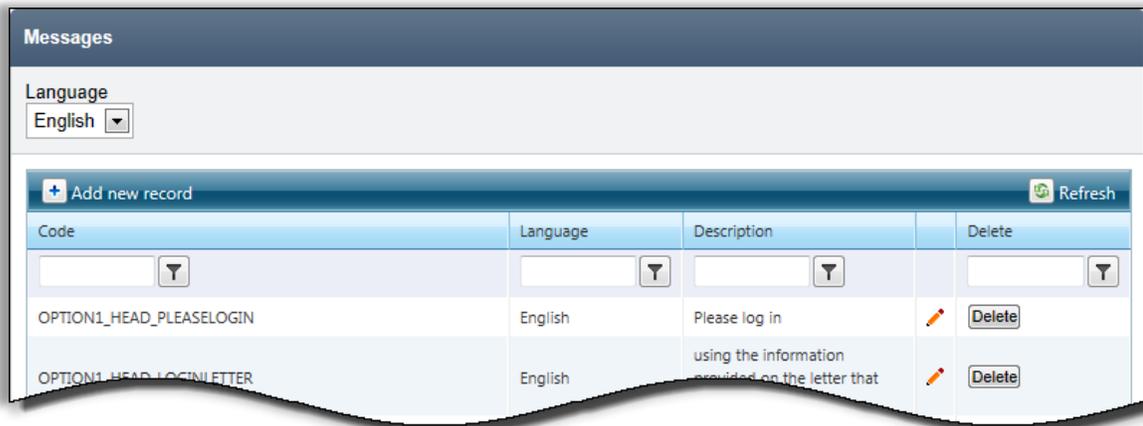
- Language is set to “English”.
- 30 messages are shown on a page; change the page size if needed using the list display control at the bottom of the page.
- Most columns include a filter button in the column header to allow for searching for data.

Messages page



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

Listings: Messages

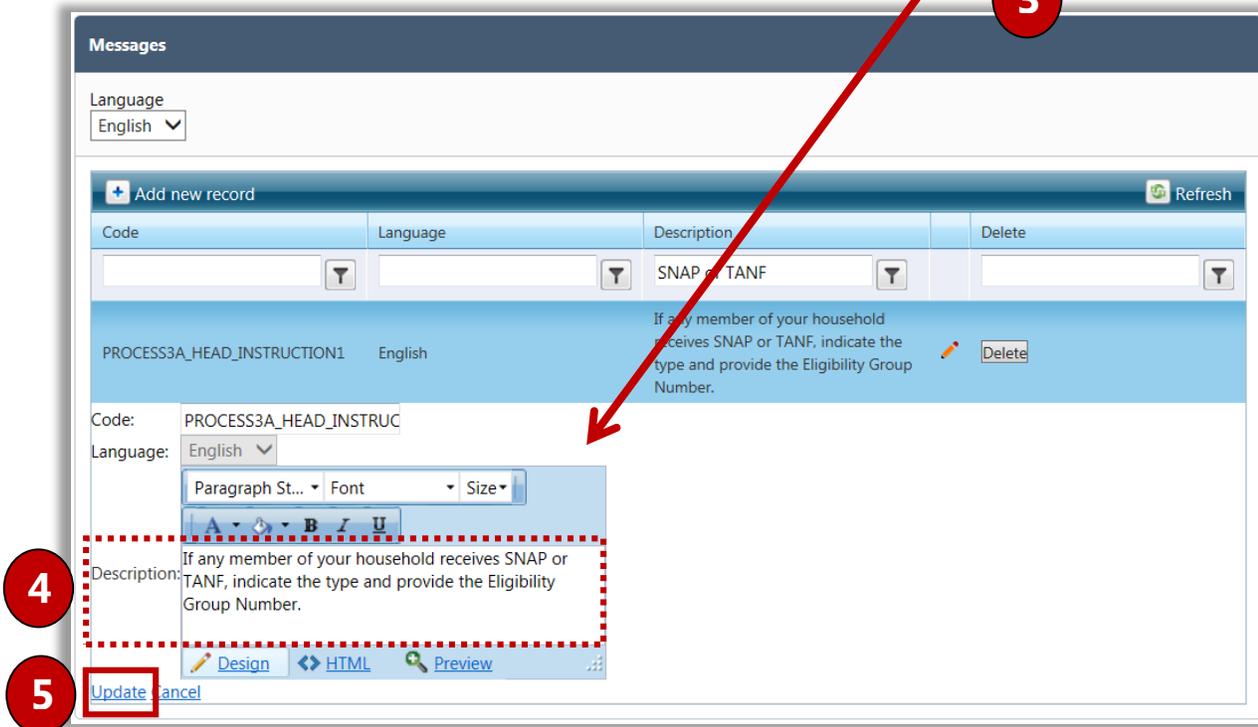


Header	Data Type	Description
Code	<i>View only</i>	Internal code string that identifies the text field
Language	<i>View only</i>	Letter language version
Description	<i>View only</i>	Field or message text shown on the district's Free & Reduced Meals Online Applications web site
(Edit)	<i>Clickable icon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

Changing Message Text

To change 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

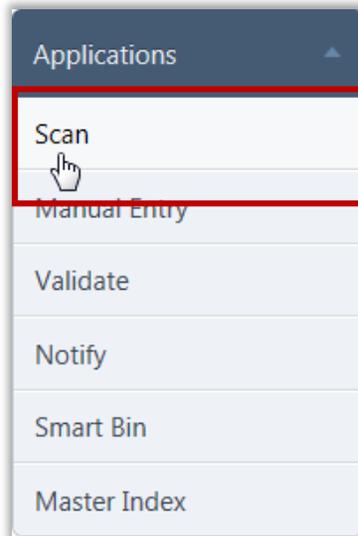
Menu selections on the **Applications** menu create and maintain student applications for Free and Reduced Priced meals.

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.

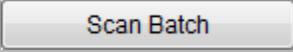
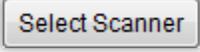
By default, on the **Scan** page:

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

Scan page

 A screenshot of the 'Scan' page in a web application. The page has a dark blue header with the title 'Scan'. Below the header, there are input fields for 'Date Scanned' (set to 5/22/2013), 'Date Received' (set to 5/22/2013), and 'Storage Location'. There is also an 'Applications in Batch' input field. On the right side, there are two buttons: 'Scan Batch' and 'Select Scanner'. Below these, there are two buttons: 'Accept Batch' (green) and 'Reject Batch' (red). At the bottom right, there are labels for 'Scanned Applications' and 'Total: 0'. The main content area is a large empty white box.

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:

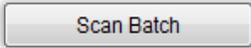
1. Remove instructional page(s) if still attached.
2. Remove all staples or paperclips. Notes or documents attached to an application can be scanned in later. See Documents section under **Master Index: View Application**.
3. Group applications in batches of 25 or less.
4. A batch can be as small as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

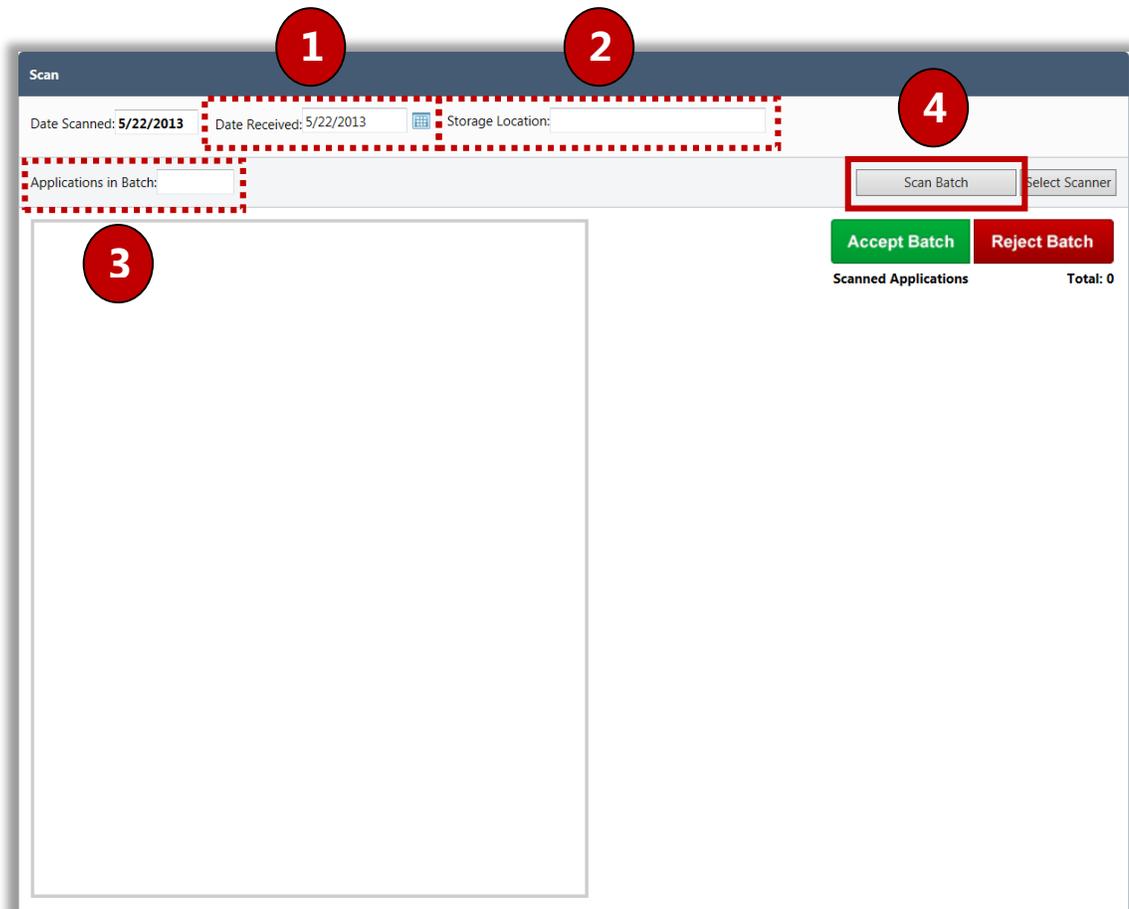
To scan an application

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' interface with the following elements and callouts:

- 1**: A red circle above the 'Date Scanned' field, which is pre-filled with '5/22/2013'.
- 2**: A red circle above the 'Date Received' field, which is pre-filled with '5/22/2013', and the 'Storage Location' field.
- 3**: A red circle above the 'Applications in Batch' input field.
- 4**: A red circle above the 'Scan Batch' button.

Other visible elements include a 'Select Scanner' button, 'Accept Batch' and 'Reject Batch' buttons, and a status bar at the bottom showing '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.

Scan

Date Scanned: Date Received: Storage Location:

Applications in Batch: Continue Select Scanner

Free and Reduced-Price School Meals Household Application for 2009 - 2010 — West Virginia Dept. of Education
FOR EACH CHILD IN HOUSEHOLD AND ONE FOR EACH FOSTER CHILD

PART 1 — CHILDREN IN SCHOOL - (Use a separate application for each foster child.)

Names of all children in school	Last Name	MI	Date of Birth	Student WIVES if (Public Schools)	Grade	10-Digit Code # for SNAP or TANF (If any, SNAP TO PART 5)
Buck Eden	R		49009761112			
Buck Tyler	W		99001054997			

PART 2 — HOMELESS, MIGRANT, RUNAWAY
If the child you are applying for is homeless, migrant, or runaway, check the appropriate box and call your county contact.

PART 3 — FOSTER CHILD - (Complete separate application for each foster child.)
If this application is for a child who is the legal responsibility of a welfare agency or court, place an X in the box and list the amount of the child's personal use monthly income. Skip to Part 5.

PART 4 — HOUSEHOLD MEMBERS AND GROSS INCOME FROM LAST MONTH - (List each person in the household. For each person who receives income, write the amount received and list how often it is received.)

1. Name Last, First
List everyone in household. Attach an separate sheet if needed.

2. Income and how often it is received: W = Weekly, E = Every 2 weeks, M = Monthly, Other
Earnings from Work, Rental, Dividends, Pension, Retirement, Social Security, Other

3. Mark box if how income
Household Size (Members in household)

Example: Smith, Jane B | 2 0 4 5 6 | 5 0 0 0

Buck Paul S | 213216 |
 Buck Ann A |
 Buck Eden R |
 Buck Tyler W |

PART 5 — SIGNATURE AND SOCIAL SECURITY NUMBER - (Adult must sign.)
An adult household member must sign the application. If Part 4 is completed, the adult signing the form must also list his or her Social Security Number or mark the "I do not have a Social Security Number" box. (See Privacy Act Statement on the back of this page.)
Do not check this box unless you are sure that you are the person who is applying for the application. If you are not the person who is applying for the application, the school system may get federal funds based on the information you provide. If you are not the person who is applying for the application, you may be penalized. If you are not the person who is applying for the application, you may be penalized.

Signature: Paul S. Buck | Social Security Number: 061510 236129800 | I do not have a Social Security Number
 Home Phone Number: 3041218891 | Work Phone Number: 3041234567
 7 Trades | Pt Pleasant | WV 25550

PART 6 — RACE AND ETHNICITY - (You do not have to complete this part to receive free and reduced price meals.)
Mark one ethnic identity. Mark one or more racial identities.

PART 7 — OTHER BENEFITS - (You do not have to complete this part to receive free and reduced price meals.)
Yes, school officials may use the information provided on this application to determine my children's eligibility for free textbooks, workbooks, and other school supplies.

Accept Batch

Reject Batch

Scanned Applications Total: 10

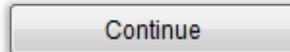
- Application1 ✓
- Application2 ✓
- Application3 ✓
- Application4 ✓
- Application5 ✓
- Application6 ✓
- Application7 ✓
- Application8 ✓
- Application9 ✓
- Application10 ✓

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



The screenshot shows the 'Free and Reduced-Price School Meals Household Application for 2009 - 2010' form. The 'Applications in Batch' field is set to 9. A 'Continue' button is visible. Below the form, a 'Message from webpage' dialog box displays a warning icon and the text: 'Application count do not match the applications in the batch'. To the right, a list of 'Scanned Applications' shows 7 applications with green checkmarks, and a 'Total: 10' is displayed.

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**.

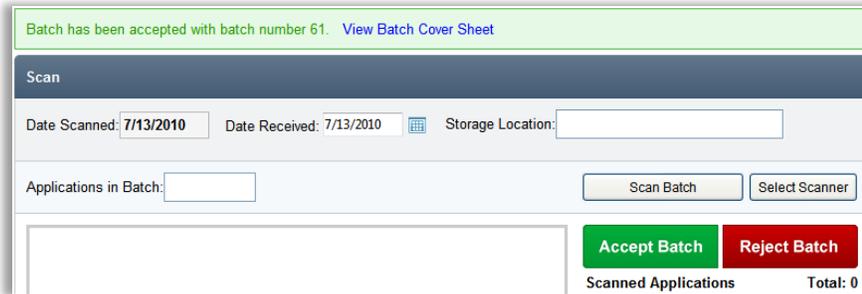
The screenshot shows the 'Scan' interface. The 'Date Scanned' is 6/17/2010 and 'Date Received' is 6/17/2010. The 'Applications in Batch' field is set to 1. A 'Continue' button is visible. Below the form, a list of 'Scanned Applications' shows 1 application with a red X (✘) next to it, and a 'Total: 1' is displayed.

Accepting an Application Batch

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

- Click  .

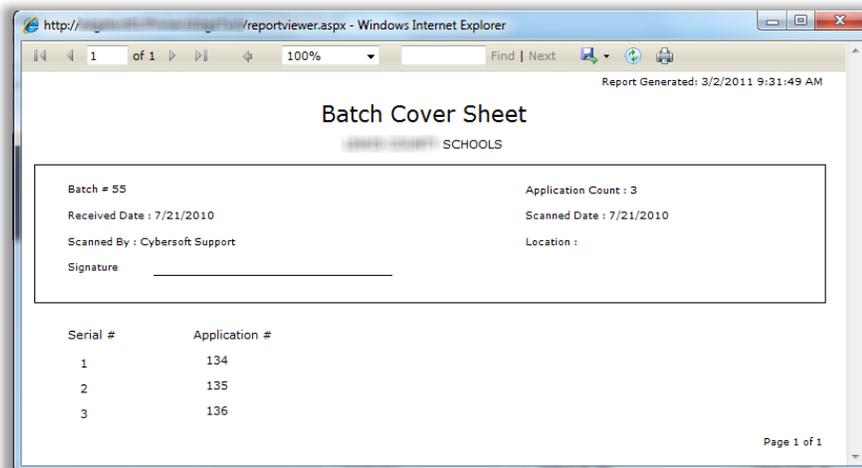
The digital image of each application is saved and assigned a permanent number. An automatically-generated batch number is assigned when the batch is accepted.



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.



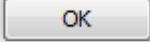
Serial #	Application #
1	134
2	135
3	136

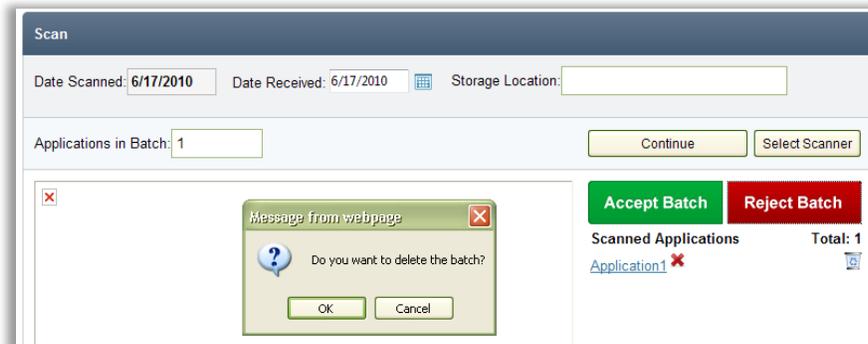
Rejecting an Application Batch

If the batch is unacceptable:

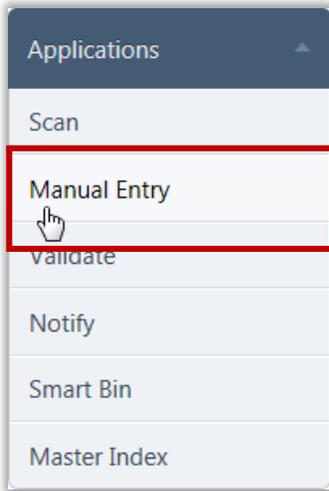
- Click  .

A confirmation message appears to verify the rejection.

- Click  .



Manual Entry

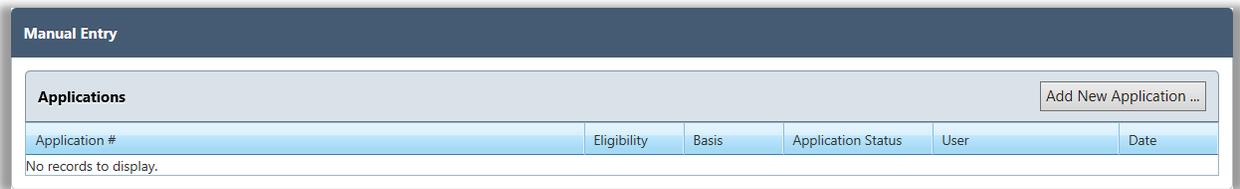


Manual Entry is the process of entering an application “by hand” in PrimeroEdge for Free & Reduced Eligibility—that is, it is not scanned and it is not entered through an Online Applications website. In this situation, the parent/guardian has completed a paper FRE application but the paper application 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.

Students

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

Case # SNAP Homeless Migrant Runaway

Household Members

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

Household Size: Total Income:

Applicant SSN: No SSN Signature Language:

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

To add a student to a manual entry application

1.) Click  to display the **Validate** window.

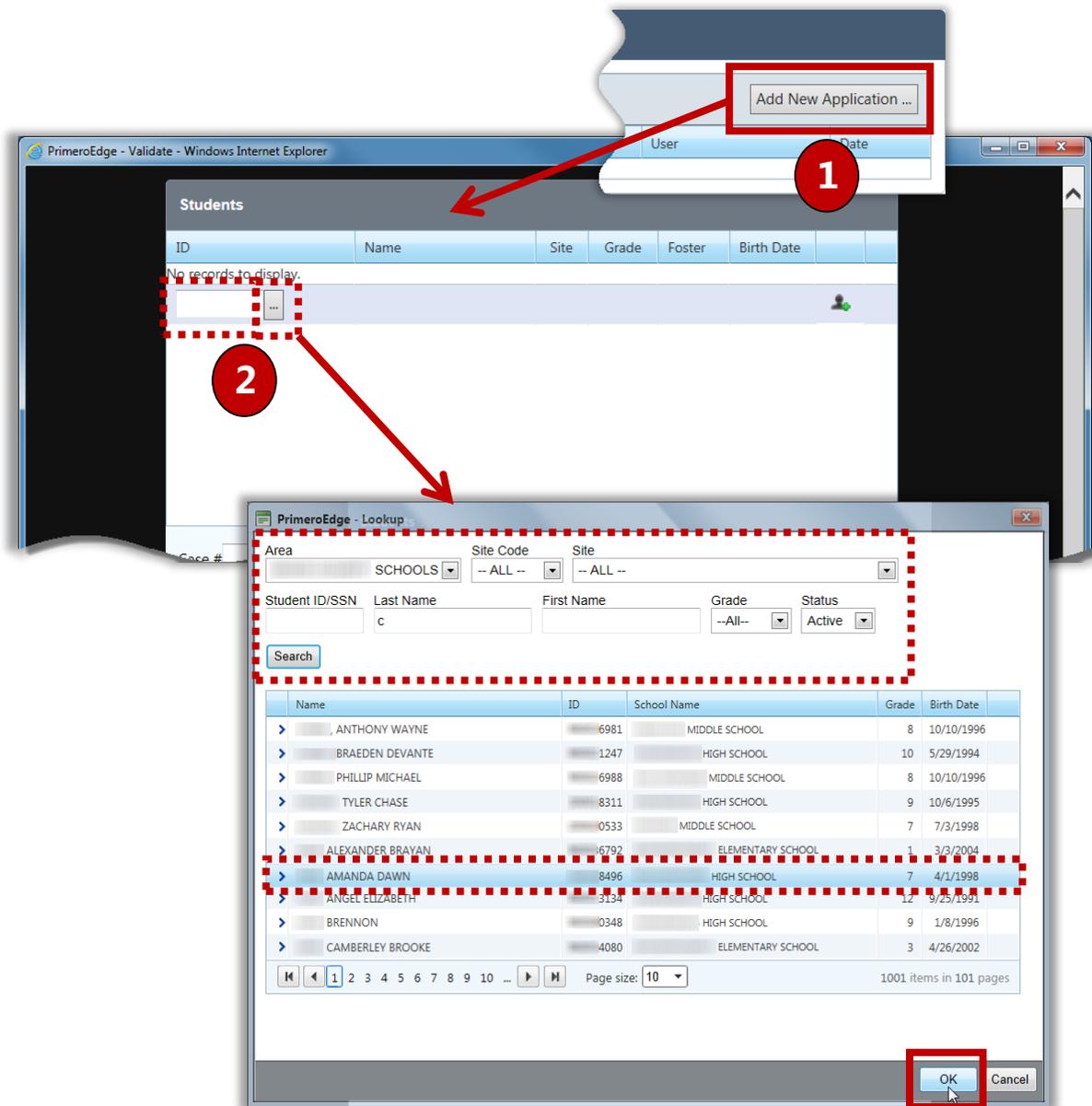
2.) In **ID**, enter the student's assigned ID.

-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.

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

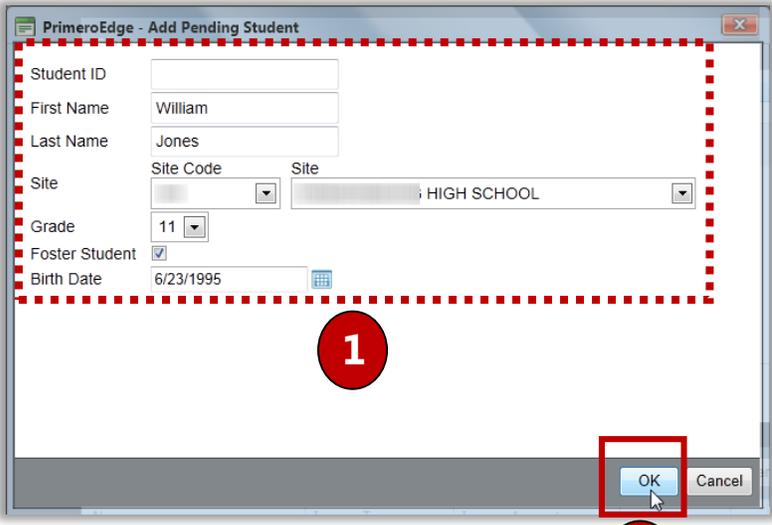


Adding a Pending Student

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 and values:

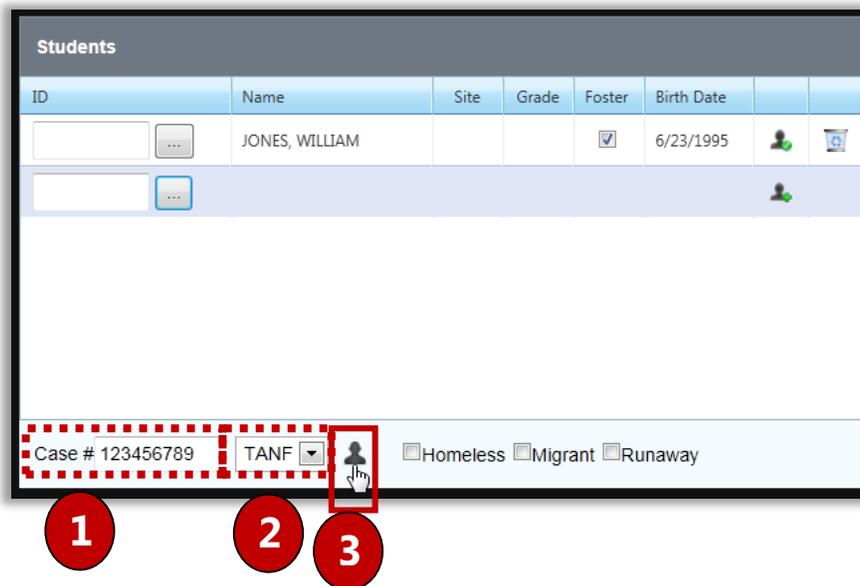
- Student ID: (empty)
- First Name: William
- Last Name: Jones
- Site Code: (empty)
- Site: HIGH SCHOOL
- Grade: 11
- Foster Student:
- Birth Date: 6/23/1995

A red dashed box encloses the form fields, with a red circle containing the number "1" below it. A red box encloses the "OK" button, with a red circle containing the number "2" below it.

Adding SNAP/TANF

To add SNAP/TANF

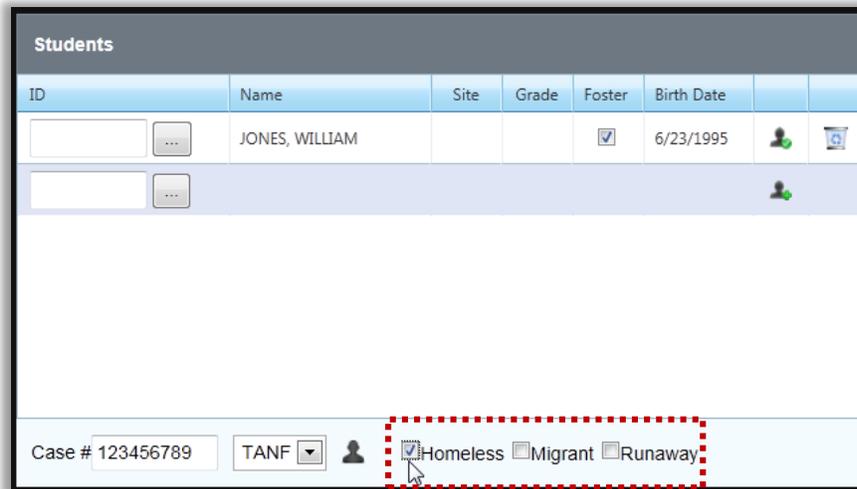
- 1.) In **Case #**, enter either the Supplemental Nutrition Assistance Program (SNAP) or Temporary Aid for Needy Families (TANF) identification number.
- 2.) In the drop-down list, select the benefits type.
- 3.) Click **Add Benefit Recipient** () and enter the name of the individual who is receiving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



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.

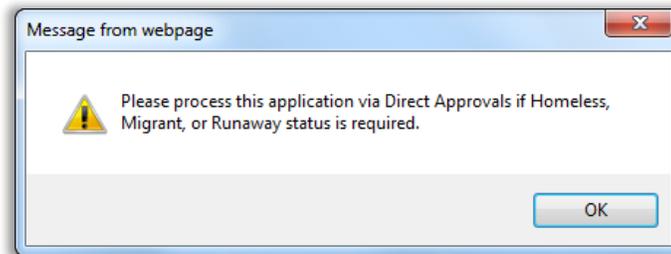
These options are shown here simply as a reminder to process applications with any of these options checked through the **Administration > Direct Approvals** function.



ID	Name	Site	Grade	Foster	Birth Date		
	JONES, WILLIAM			<input checked="" type="checkbox"/>	6/23/1995		

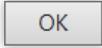
Case # 123456789 TANF Homeless Migrant Runaway

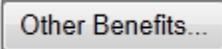
If a Direct Approval option is selected, a message appears to alert you to the proper procedure for processing these types of approvals.

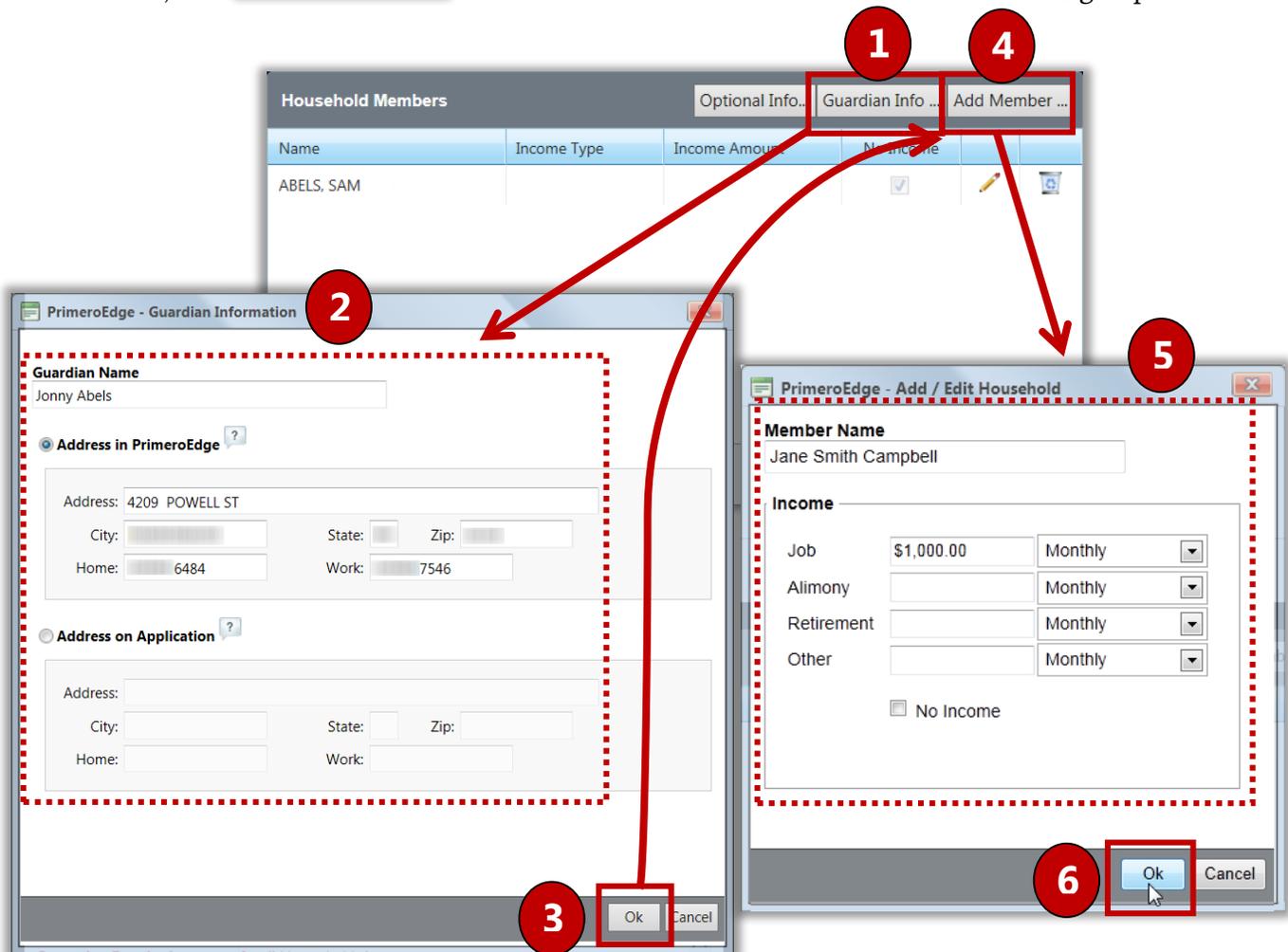


Adding Household Members

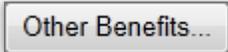
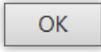
To add household members

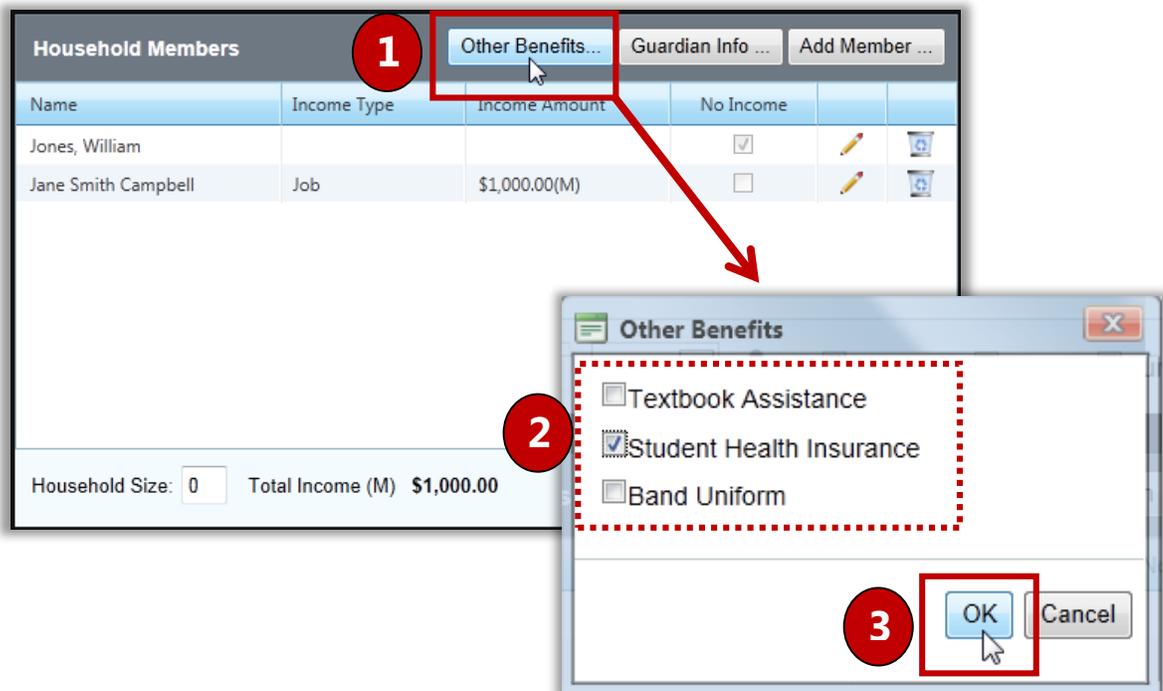
1. Click  .
2. Enter the parent/guardian name and select or enter an address.
3. Click  .
4. In the **Household Members** group, click  .
5. Enter the member name and enter the income or select **No Income**.
6. Click  .

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



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 .

The screenshot shows a 'Household Members' table with the following data:

Name	Income Type	Income Amount	No Income		
ABELS, SAM			<input checked="" type="checkbox"/>		

At the bottom of the table, it shows: Household Size: Total Income (Y) **\$0.00**

The 'Optional Information' dialog box contains the following options:

- Ethnicity**
 - Hispanic or Latino
 - Not Hispanic or Latino
 - Not Provided
- Race**
 - Asian
 - American Indian or Alaskan
 - Black or African American
 - Native Hawaiian or Other Pacific Islander
 - White
- Other Benefits**
 - Textbook Assistance
 - Student Health Insurance
 - School Fee Waiver

At the bottom of the dialog box, there are and buttons.

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 form with the following elements:

- 1** (Red circle) points to the **Applicant SSN** field containing "123456789".
- No SSN**
- Signature**
- Language:** English (dropdown menu)
- Valid** (green text)
- Eligibility: **FREE**
- Basis: **FOSTER**
- Valid Until: **7/31/2013**
- Buttons: **Delete**, **Pending Application**, **Comments**

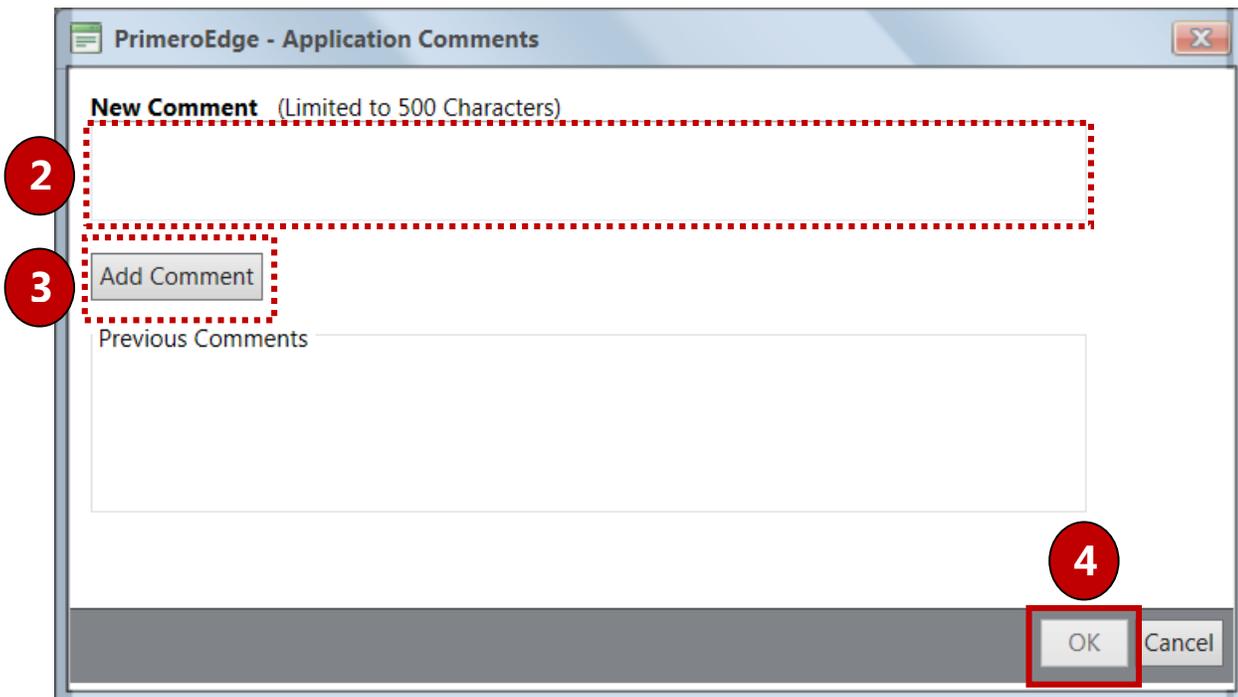
Adding Comments

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

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

3. Click **Add Comment**.

4. Click **OK**.

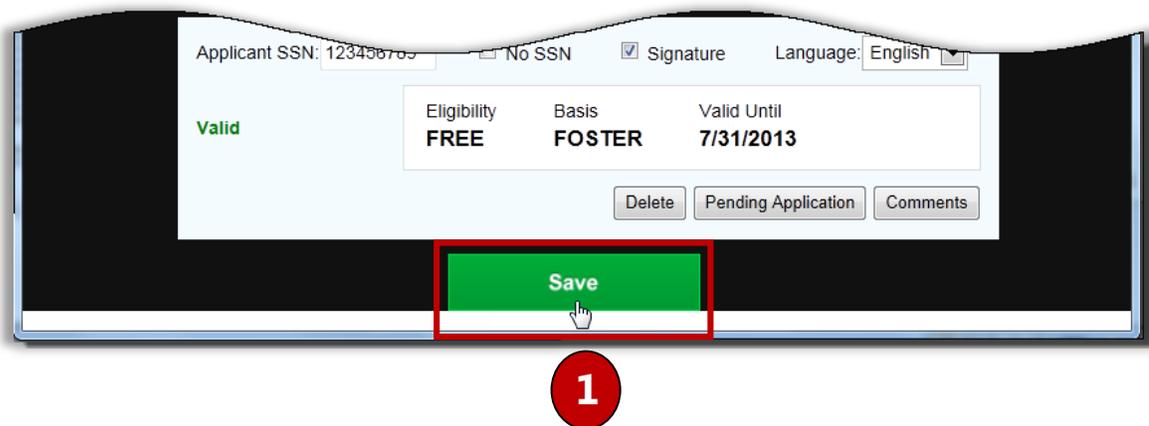


Saving an Application as Complete

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**”.

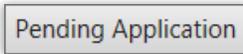
1. Click  .

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

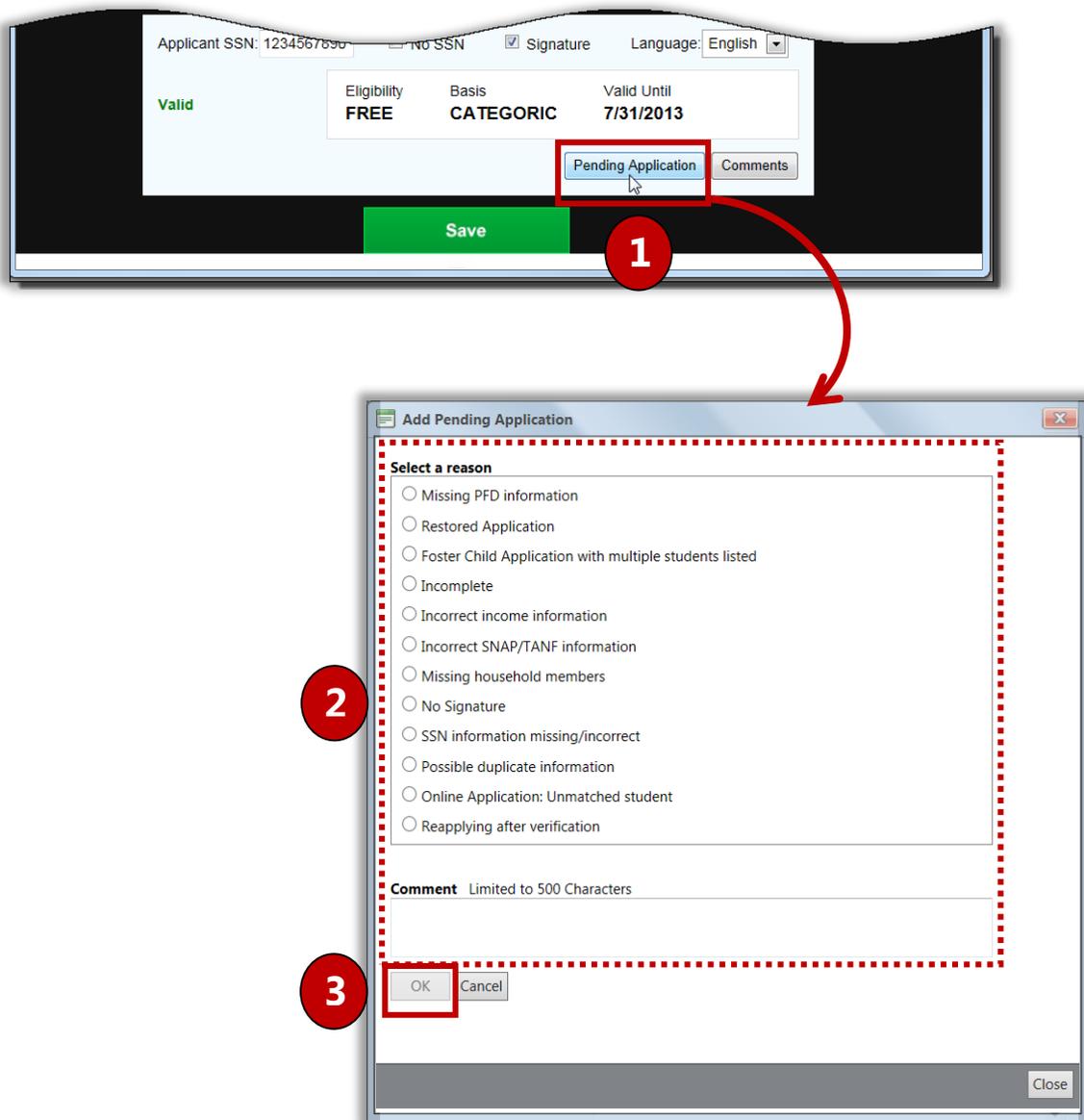


Saving an Application as Pending

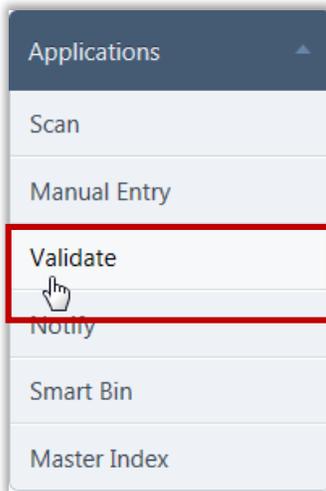
To save the application but not process the application as complete:

- 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".

Validate page

Validate

Batch # OR Batch Status

Application Batches							
Batch #	Total Applications	Received Date	Batch Type	Batch Status	Date Checked Out	Checked Out By	
408	1	8/21/2012	Scanned	Accepted	4/18/2013	Cybersoft Support	<input type="button" value="Check-In"/>
409	1	8/21/2012	Scanned	Accepted	12/14/2012	Cybersoft Support	<input type="button" value="Check-In"/>
410	1	8/21/2012	Scanned	Accepted	12/14/2012	Cybersoft Support	<input type="button" value="Check-In"/>
411	1	8/21/2012	Scanned	Accepted	12/18/2012	Cybersoft Support	<input type="button" value="Check-In"/>
415	3	8/24/2012	Scanned	Accepted	3/15/2013	Cybersoft Support	<input type="button" value="Check-In"/>
416	3	8/24/2012	Scanned	Accepted	3/13/2013	Cybersoft Support	<input type="button" value="Check-In"/>
420	1	9/13/2012	Manual	Accepted			<input type="button" value="Check-In"/>
452	6	12/19/2012	Scanned	Accepted	5/1/2013	Cybersoft Support	<input type="button" value="Check-In"/>
509	9	5/14/2013	Scanned	Accepted			<input type="button" value="Check-In"/>
510	10	5/15/2013	Scanned	Accepted			<input type="button" value="Check-In"/>

Page size: 12 items in 2 pages

Page Functions

Button	Description
<input type="button" value="Apply"/>	Click to refreshes the page to display all batches meeting the selected conditions.

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)

Application # 1470 (1 of 1) Batch #: 481

Free and Reduced-Price Meals Household Application for 2012 - 2013 — West Virginia Dept. of Education
 USE BLACK OR DARK BLUE INK. PRINT HEATLY. COMPLETE ONE APPLICATION PER HOUSEHOLD.

PART 1 — Names of ALL Children in School

Last Name	First Name	MI	Date of Birth (MM/DD)	Sex (M/F)	Grade	School	Student WITH # (Public Schools)
Jeanie			3/13/2001		06		
Brenda Lane			5/15/2003		04		

FROM LAST MONTH

1. Name (Last, First) 2. Mark if SNAP TANF Homeless Migrant Runaway

3. Income and how often it is received: W - Weekly, E - Every 2 weeks, T - Twice per month, M - Monthly

Name	W	E	T	M	Income Amount	No Income
Jeanie	X				0.00	<input checked="" type="checkbox"/>
Brenda L	X				0.00	<input checked="" type="checkbox"/>

Household Size: 2 Total Income (Y) \$0.00

Applicant SSN: No SSN Signature Language: English

Valid Eligibility: FREE Basis: CATEGORIC Valid Until: 7/31/2013

Application # 1470 [Delete] [Pending Application] [Comments]

← Previous Save Save & Next →

Students Group

The **Students** group of the Validation Workspace allows you to confirm or lookup students to ensure the system recognized the parent's handwriting and the correct students are listed.

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

ID	Name	Site	Grade	Foster	Birth Date		
<input type="text"/>	JEANIE		06	<input type="checkbox"/>	3/13/2001		
<input type="text"/>	BRENDA L		04	<input type="checkbox"/>	5/15/2003		
<input type="text"/>							

Case # TANF Homeless Migrant Runaway

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 Primero database
Site	Numeric school identifier
Grade	Student's grade level
Birth Date	Student's birth date as stored in the Primero database

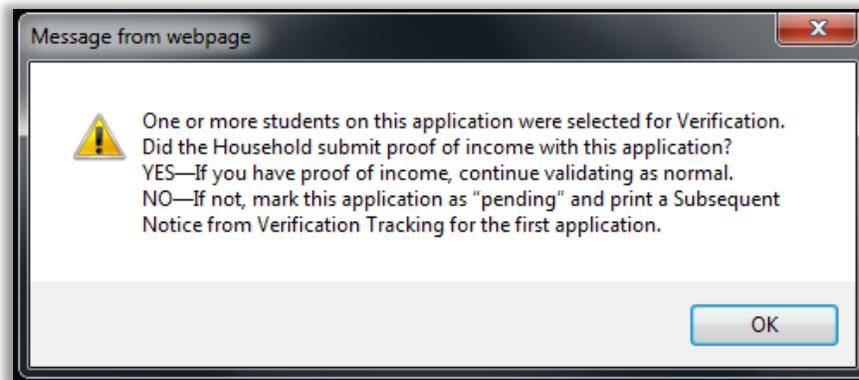
Field	Description
<p>(Approval status)</p>	<p>Application approval status and reason (hover the mouse cursor over the icon).</p> <p> Add new pending student; click to display the Add Pending Student popup.</p> <p> Pending student; click to display the Add Pending Student popup.</p> <p> No student in 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.</p> <p> 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</p>
<p>(Delete Student)</p>	<p>Click Delete () to remove the student listing from the Students group</p>
<p>Case#</p>	<p>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</p>
<p></p>	<p>Click to add or view beneficiary name; if the applicant is receiving benefits, the beneficiary name must be included with the application.</p>
	<p>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.</p>

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. It is always best 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 there will be no prior household history so you will not see the **Add Student** button.

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 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

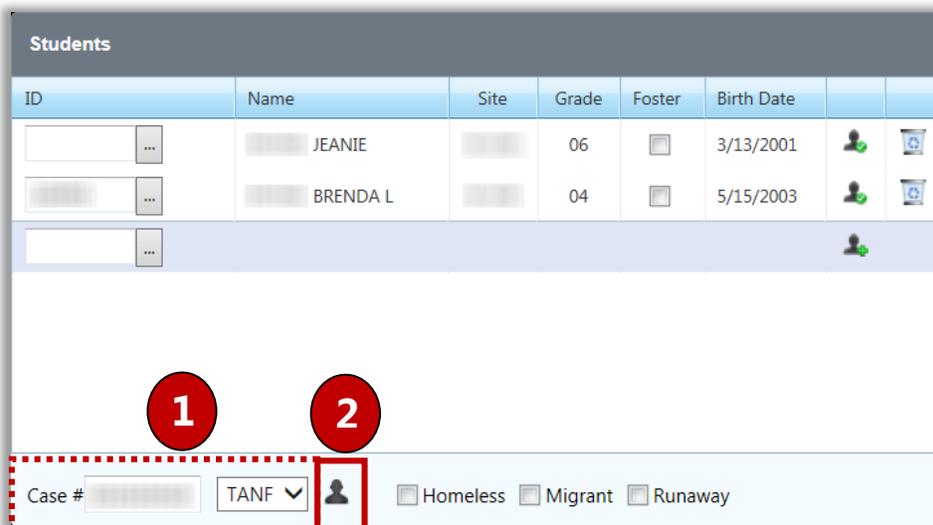
To remove a student, click **Delete** () in a student listing.

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.

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



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 WVEIS # (Public Schools)
<i>Income</i>							
<i>[Redacted]</i>	<i>Addison</i>		<i>08 02 05</i>		<i>PK</i>	<i>[Redacted]</i>	<i>9632</i>
<i>[Redacted]</i>	<i>Dalen</i>		<i>07 23 01</i>		<i>03</i>	<i>[Redacted]</i>	<i>3939</i>
<i>[Redacted]</i>	<i>Kassidy</i>		<i>02 11 99</i>		<i>06</i>	<i>[Redacted]</i>	<i>2993</i>

PART 2 — SNAP/TANF NUMBER
If any member of your household receives SNAP or TANF indicate which and provide the ID# (if any, SKIP TO PART 5)

PART 3 — HOMELESS, MIGRANT, RUNAWAY
If the child you are applying for is homeless, migrant, or runaway, check the appropriate box and call your county contact

Homeless Migrant Runaway

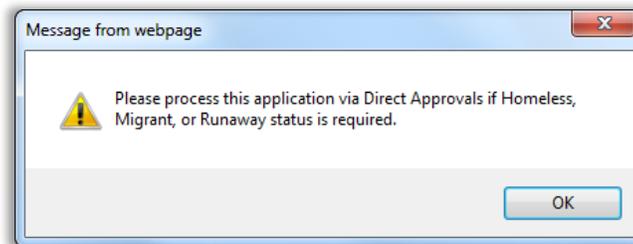
PART 4 — HOUSEHOLD MEMBERS AND GROSS INCOME FROM LAST MONTH
List each person in the household. For each person who receives income, write the amount received and fill in how often it is received.

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

4. How Often? 5. How Often? 6. How Often?

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.

Students							
ID	Name	Site	Grade	Foster	Birth Date		
<input type="text" value=""/>	PETTER, JEANIE	W-246	06	<input type="checkbox"/>	3/13/2001		
120301	PETTER, BRENDA L	W-246	04	<input checked="" type="checkbox"/>	5/15/2003		
<input type="text" value=""/>							

Case # 2212222222 TANF Homeless Migrant Runaway

Household Members Group

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

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

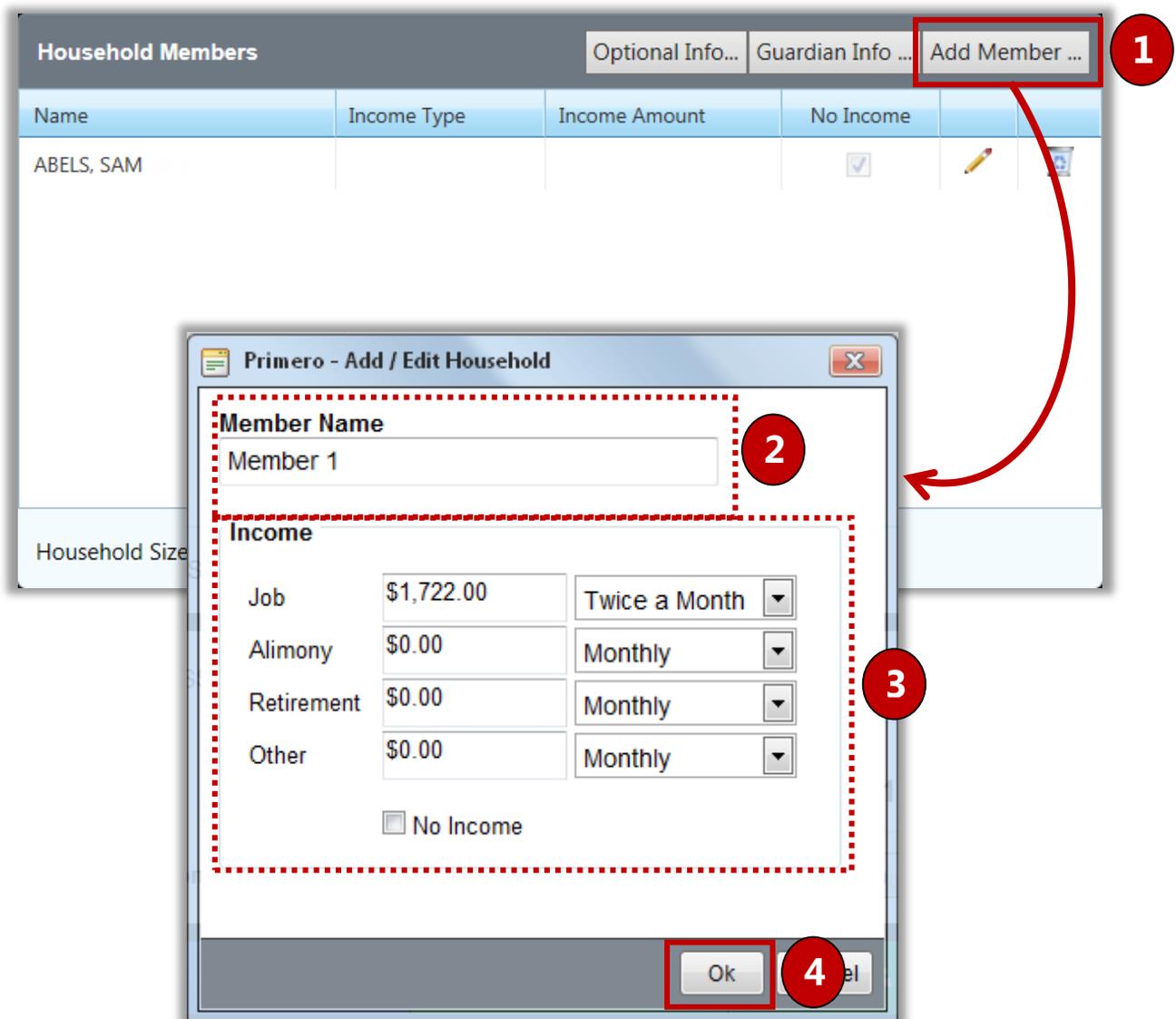
Household Members					Optional Info...	Guardian Info ...	Add Member ...
Name	Income Type	Income Amount	No Income				
Jeanie			<input checked="" type="checkbox"/>				
Brenda L			<input checked="" type="checkbox"/>				

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

Add Member

To add a household member

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. The 'Add Member ...' button is highlighted with a red box and a red circle labeled '1'. A red arrow points from this button to the 'Primero - Add / Edit Household' dialog box. The dialog box has a red dashed border and contains the following fields:

- Member Name**: A text box containing 'Member 1', highlighted with a red circle labeled '2'.
- Income**: A group of fields for entering income details, highlighted with a red circle labeled '3'.

Income Type	Amount	Frequency
Job	\$1,722.00	Twice a Month
Alimony	\$0.00	Monthly
Retirement	\$0.00	Monthly
Other	\$0.00	Monthly

No Income
- Ok**: A button at the bottom right of the dialog box, highlighted with a red box and a red circle labeled '4'.

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.

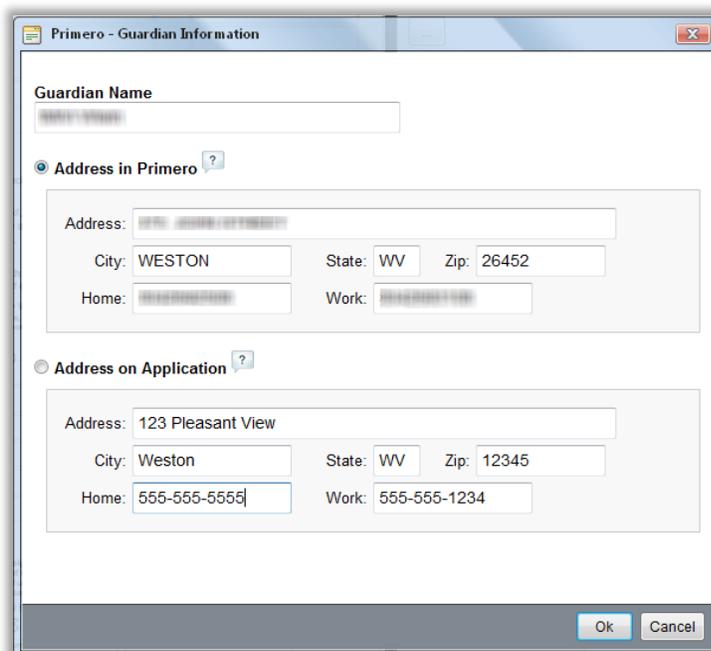
Guardian Information

Address in Primero 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.



The screenshot shows a window titled "Primero - Guardian Information". It contains two radio button options: "Address in Primero" (which is selected) and "Address on Application". Under "Address in Primero", there are input fields for Address, City (WESTON), State (WV), Zip (26452), Home, and Work. Under "Address on Application", there are input fields for Address (123 Pleasant View), City (Weston), State (WV), Zip (12345), Home (555-555-5555), and Work (555-555-1234). At the bottom right, there are "Ok" and "Cancel" buttons.

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: [REDACTED] No SSN Signature Language: English

Valid

Eligibility	Basis	Valid Until
FREE	INCOME	7/31/2011

Application #: 168

Add for Verification Delete Pending Application Comments

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.

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 **Comments*** 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:

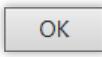
- Delete
- Place the application in Pending
- Add comments
- Add the application for verification processing

Deleting an Application

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.

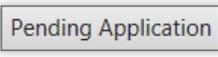
The **Delete Application** popup displays.

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.

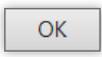
After an application is deleted, it can only be accessed via the Smart Bin which is explained later in this manual.

Pending an Application

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 .

In the **Application Comments** popup:

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

Note

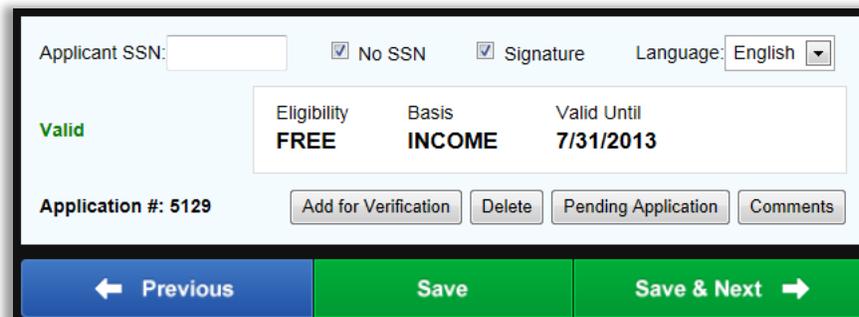
The date, time, and username are listed with the comment text in the **Previous Comments** group. Previous Comments cannot be edited or removed.

Saving an Application

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 validation workspace for an application. At the top, there is a form with fields for 'Applicant SSN', 'No SSN' (checked), 'Signature' (checked), and 'Language' (English). Below this, a table displays the application's status: 'Valid' in green, 'Eligibility' as 'FREE', 'Basis' as 'INCOME', and 'Valid Until' as '7/31/2013'. The application number is '5129'. At the bottom, there are three buttons: 'Previous' (blue), 'Save' (green), and 'Save & Next' (green with a right arrow). Below the 'Save & Next' button, there is a grayed-out version of the same button.

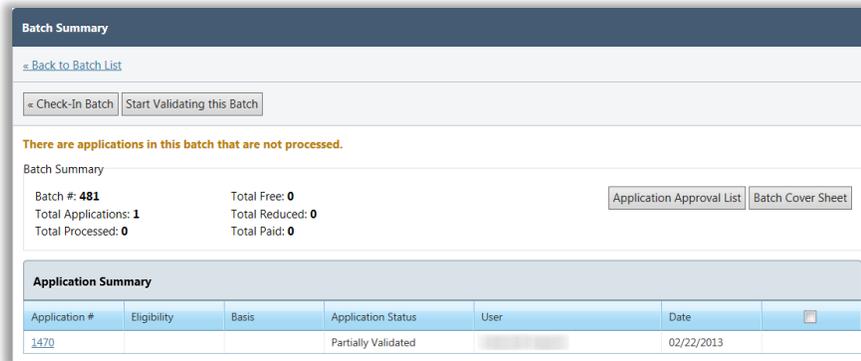
- Click  to save changes and close the Validation Workspace.
- Click  to save changes and display the next application in the batch in the Validation Workspace window.
- A grayed button () is shown for the last application in the batch (unavailable). To save changes and close the application, you must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

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.

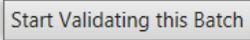


A user with proper permissions can check in a batch that is currently checked out by another user. This is helpful if someone leaves without completing the batch or checking it in.

Click  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  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  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](#) [Start Validating this Batch](#)

There are applications in this batch that are not processed.

Batch Summary

Batch #: **481** Total Free: **0**
 Total Applications: **1** Total Reduced: **0**
 Total Processed: **0** Total Paid: **0**

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

Application Summary

Application #	Eligibility	Basis	Application Status	User	Date	<input type="checkbox"/>
1470			Partially Validated		02/22/2013	<input type="checkbox"/>

Notifying a Batch

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

To generate notification letters, select the **Notify** () check box.

Batch Summary

[← Back to Batch List](#)

[← Check-In Batch](#) [Start Validating this Batch](#)

There are applications in this batch that are not processed.

Batch Summary

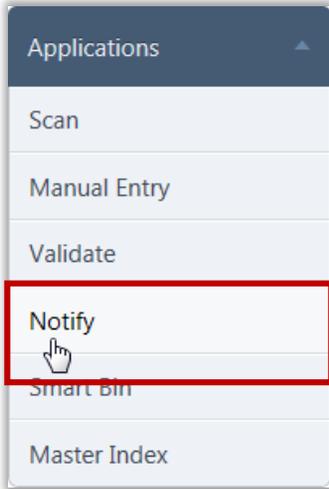
Batch #: **408** Total Free: **0**
 Total Applications: **1** Total Reduced: **0**
 Total Processed: **0** Total Paid: **0**

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

Application Summary

Application #	Eligibility	Basis	Application Status	User	Date	<input checked="" type="checkbox"/>
1394			Accepted	Cybersoft Support	08/21/2012	<input checked="" type="checkbox"/>

Notify



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

Notification letters are addressed to the parents of the youngest student included on the application. The address used is the PrimeroEdge database address for that student, unless “Application Address” was selected on the **Guardian Info** tab.

All students processed on the application are listed in the grid on the letter (see Letter Templates).

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

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

Notify page

Notify

Batch Status: Notified Apply

Batch to Notify						
<input type="checkbox"/>	Batch #	Total Applications	Received Date	Checked Out By	Date Checked Out	Batch Type
<input type="checkbox"/>	399	1	7/16/2012			Online
<input type="checkbox"/>	402	3	7/20/2012			Online
<input type="checkbox"/>	403	1	7/21/2012			Manual
<input type="checkbox"/>	417	1	8/28/2012			Manual
<input type="checkbox"/>	425	1	9/22/2012			Manual
<input type="checkbox"/>	427	1	9/26/2012			Manual
<input type="checkbox"/>	429	1	10/11/2012			Manual
<input type="checkbox"/>	432	2	10/26/2012			Manual
<input type="checkbox"/>	433	1	10/29/2012			Online
<input type="checkbox"/>	443	1	11/30/2012	Cybersoft Support	4/19/2013	Manual

Page size: 10 18 items in 2 pages

Page Functions

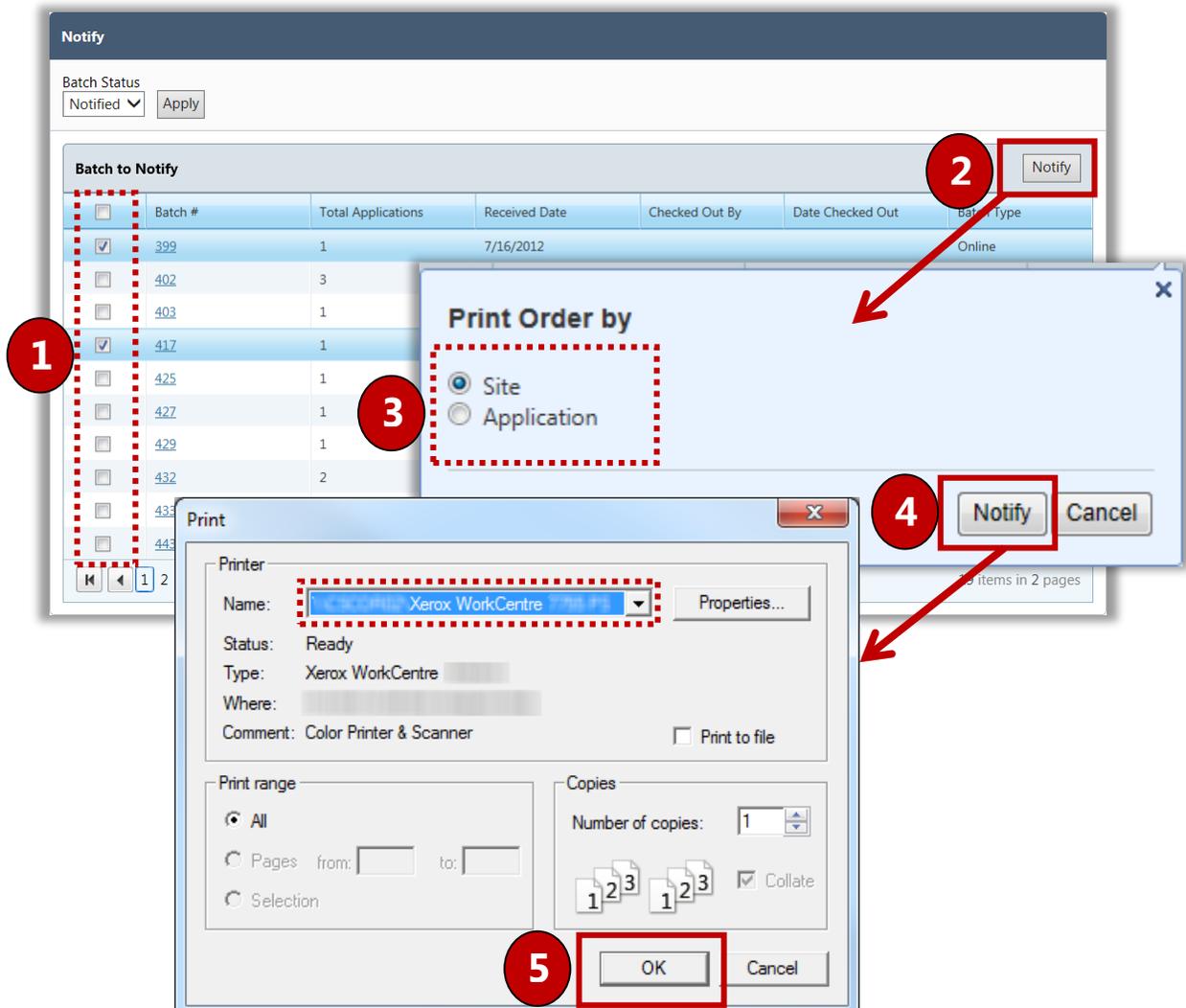
Button	Description
	Click to refresh the page to display all batches that meet the selected criteria.

Sending Notification for Applications in a Batch

To send notifications for applications in a batch

- Select one of the following:
 - Select in the first column header, to select all batches for notification, or
 - Select in individual batch listings to specify batches to notify.

(Selecting causes the button to display.)
- Click .
- Select one print order option.
- Click .
- Select the printer and any necessary settings in the printer dialog, and click .



Sending Notification for Selected Applications

To send notifications for selected applications

1. Click the [Batch #](#) link in the **Batch #** column.
2. Click in the first column for each letter to print (add check mark).
3. Click .
4. Select the printer and other necessary settings, and click .
5. Click .

Notify

Batch Status
 Notified

Batch to Notify

<input type="checkbox"/>	Batch #	Total Applications	Received Date	Checked Out By	Date Checked Out	Batch Type
<input checked="" type="checkbox"/>	399	1	7/16/2012			Online
<input type="checkbox"/>	402	3	7/20/2012			Online
<input type="checkbox"/>	403	1	7/21/2012			Manual
<input checked="" type="checkbox"/>	417	1	8/28/2012			Manual
<input type="checkbox"/>	425	1	9/22/2012			Manual
<input type="checkbox"/>	427	1	9/26/2012			Manual
<input type="checkbox"/>	429	1	10/11/2012			Manual
<input type="checkbox"/>	432					
<input type="checkbox"/>	433					
<input type="checkbox"/>	443					

Applications in Batch #385

<input type="checkbox"/>	Application Number	Eligibility	Basis
<input checked="" type="checkbox"/>	1377	Reduced	Income
<input type="checkbox"/>	1378	Free	Income
<input checked="" type="checkbox"/>	1379	Reduced	Income

Print

Printer Name:

Status: Ready

Type: Ricoh Aficio 1050 PCL

Where: Consulting Printer Area

Comment: 10.0.0.241 Print to file

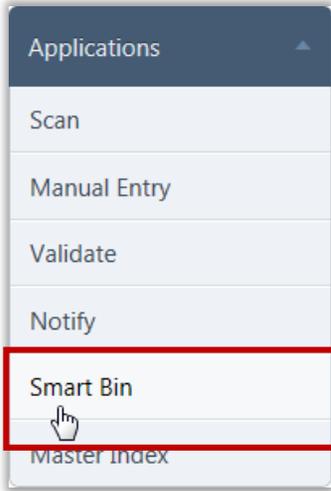
Print range:
 All
 Pages from: to:
 Selection

Copies
 Number of copies:
 Collate

Applications in Batch #385

<input type="checkbox"/>	Application Number	Eligibility	Basis
<input checked="" type="checkbox"/>	1377	Reduced	Income
<input type="checkbox"/>	1378	Free	Income
<input checked="" type="checkbox"/>	1379	Reduced	Income

Smart Bin



Smart Bin collects applications marked as “Pending”, or applications that include Pending students, or applications that have been Deleted. These applications can be opened and modified.

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 lists all applications marked as Pending during validation. When more information is received such that the Validation process can be completed, the application is processed through the Smart Bin.

Applications deleted from the **Validation Workspace** window are stored in the Smart Bin. Deleted applications can be viewed and restored from the **Smart Bin Deleted Applications** list.

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

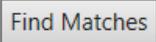
- **Pending Students** is selected.
- **All** is selected in the display options group.

Smart Bin page

The screenshot shows the 'Smart Bin Pending Students' page. At the top, there are radio buttons for 'Pending Students' (selected), 'Pending Applications', and 'Deleted Applications'. Below this, there are display options: 'All' (selected), 'Potential Matches', and 'Matched'. There are also buttons for 'Process All Matches' and 'Find Matches'. A 'Refresh' button is located at the top right of the table area. The table has the following columns: Student ID, Last Name, First Name, Site Code, Grade, Birth Date, Application, Application Status, Matched, Look Up, and an edit/delete icon. 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	1432	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.

Processing Pending Students

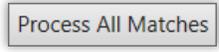
To process pending students

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, a  icon is displayed in **Matched**.

Click  in the student listing to search and confirm a match using the process described in Validate (see pages 33—45).

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

2 Edit icon

3 Update Cancel

4 Process All Matches Find 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		
		Peter		PK	12/21/2011	1406	Partially Validated		
		Brenda		4	5/15/2003	1470	Partially Validated		

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		

Viewing Application Information and Processing Pending Applications

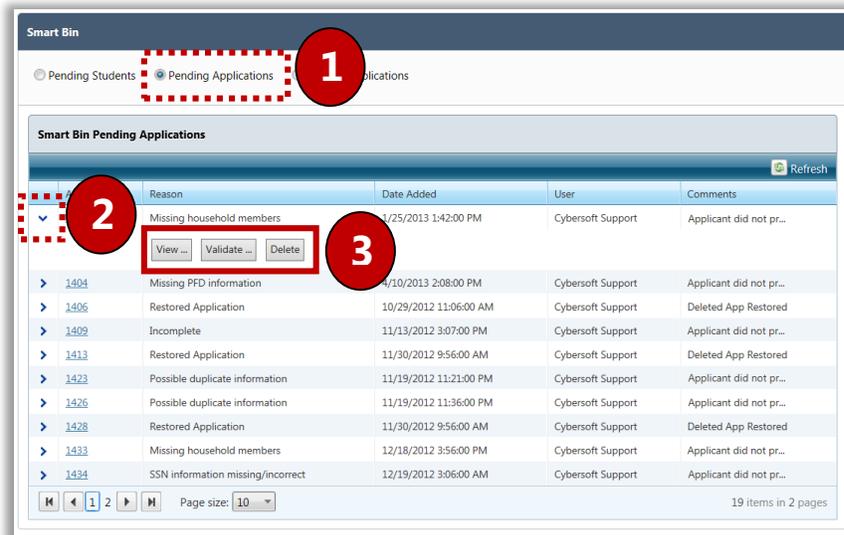
To view application information and process pending applications

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 33—45 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.

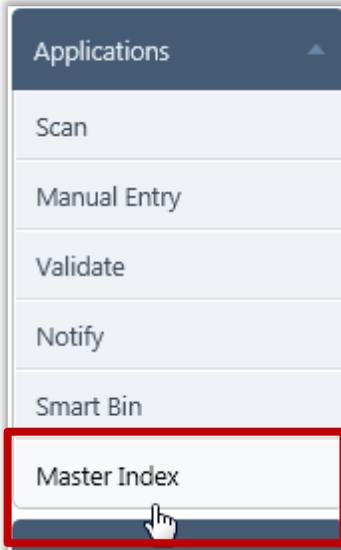
The screenshot illustrates the steps for restoring a deleted application in the Smart Bin interface. The interface shows a navigation bar with radio buttons for 'Pending Students', 'Pending Applications', and 'Deleted Applications'. A table lists deleted applications with columns for Application #, Reason, Date Added, User, and Comments. A dialog box at the bottom asks 'Would you like to validate the application now?' with 'Yes' and 'No' buttons.

Application #	Reason	Date Added	User	Comments
> 132	Other (please specify in comments)	8/20/2010 9:59:00 AM	...	used for set up with...
> 133	Other (please specify in comments)	8/20/2010 9:59:00 AM	...	used with set up for...
> 134	Other (please specify in comments)	8/20/2010 10:01:00 AM	...	use for set up
> 135	Other (please specify in comments)	8/20/2010 10:01:00 AM	...	used for set up
> 136	Other (please specify in comments)	8/20/2010 10:01:00 AM	...	used for set up
> 198	Other (please specify in comments)	8/30/2010 9:44:00 AM	...	application processe...
> 382	Students are Direct Approvals	9/7/2010 5:17:00 PM	...	already on D/C
> 418	Students are Direct Approvals	11/13/2010 4:39:00 PM	...	already DC import
> 424	Students are Direct Approvals	9/9/2010 3:43:00 PM	...	already D/C status
> 455	Students are Direct Approvals	already approved as ...

The dialog box at the bottom contains the following text:

The application has been moved to Pending Applications.
Would you like to validate the application now?

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

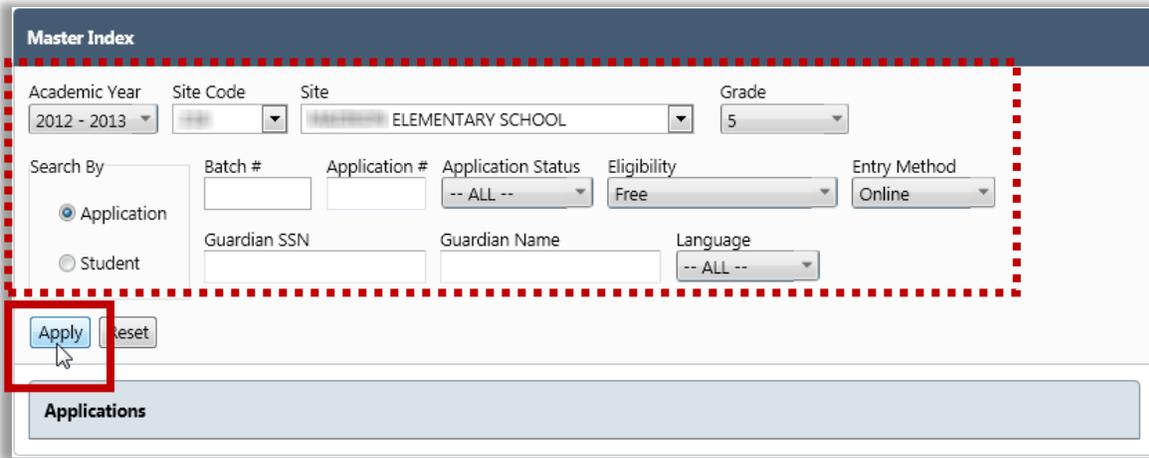
 A screenshot of the 'Master Index' search page. At the top, there are four dropdown menus: 'Academic Year' (set to '2012 - 2013'), 'Site Code' (set to '-- ALL --'), 'Site' (set to '-- ALL --'), and 'Grade' (set to '-- ALL --'). Below these are two rows of search criteria. The first row includes 'Search By' (radio buttons for 'Application' and 'Student', with 'Application' selected), 'Batch #' (text input), 'Application #' (text input), 'Application Status' (dropdown set to '-- ALL --'), 'Eligibility' (dropdown set to '-- ALL --'), and 'Entry Method' (dropdown set to '-- ALL --'). The second row includes 'Guardian SSN' (text input), 'Guardian Name' (text input), and 'Language' (dropdown set to '-- ALL --'). At the bottom left of the search area are 'Apply' and 'Reset' buttons. Below the search area is a large empty box labeled 'Applications'.

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.

To display an application by application

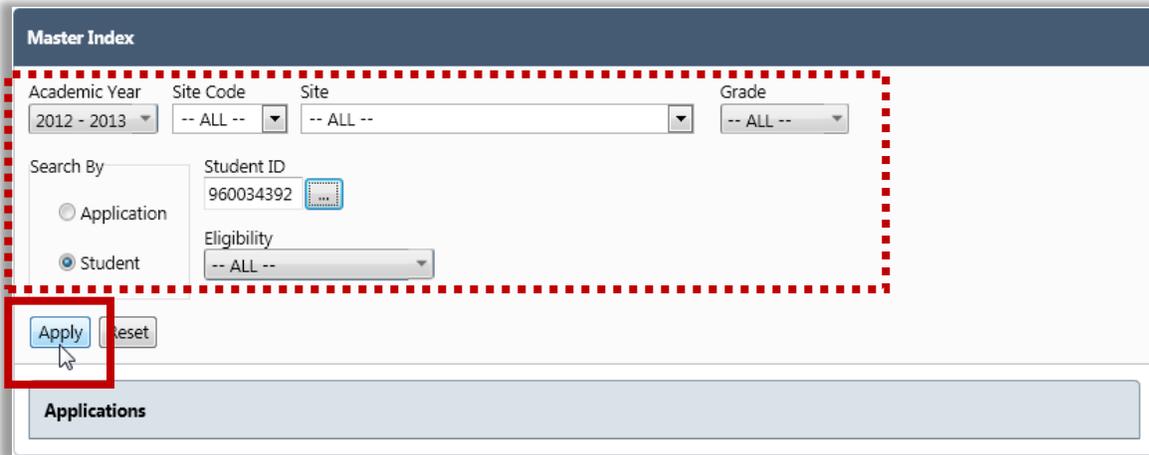
- Select search criteria and click  .



The screenshot shows the 'Master Index' search interface. The 'Search By' section has the 'Application' radio button selected. Search criteria include: Academic Year (2012 - 2013), Site Code (---), Site (ELEMENTARY SCHOOL), Grade (5), Batch #, Application #, Application Status (-- ALL --), Eligibility (Free), Entry Method (Online), Guardian SSN, Guardian Name, and Language (-- ALL --). The 'Apply' button is highlighted with a red box and a mouse cursor.

To display an application by student

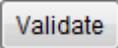
1. Select “**Student**” in the **Search By** group.
2. Select search criteria and click  .



The screenshot shows the 'Master Index' search interface. The 'Search By' section has the 'Student' radio button selected. Search criteria include: Academic Year (2012 - 2013), Site Code (-- ALL --), Site (-- ALL --), Grade (-- ALL --), Student ID (960034392), and Eligibility (-- ALL --). The 'Apply' button is highlighted with a red box and a mouse cursor.

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  to open and reprocess the application in the Validation Workspace.

- Click **Notification ...** to view and print 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 Section 7: Compliance.

PrimoEdge - View Application - Windows Internet Explorer

Application #: 1393 (0 of 1) Batch #: 403

Buttons: Validate, Notification ...

Application Info | Optional Info | Guardian Info | History | Refuse Benefits | Image/Documents | Verification Info | Verification Response

Application # 1393, Entry Method Manual, Date Received 7/21/2012, Language English, Add For Verification

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

Case # 1234567890, Case Type SNAP, Benefits Recipient

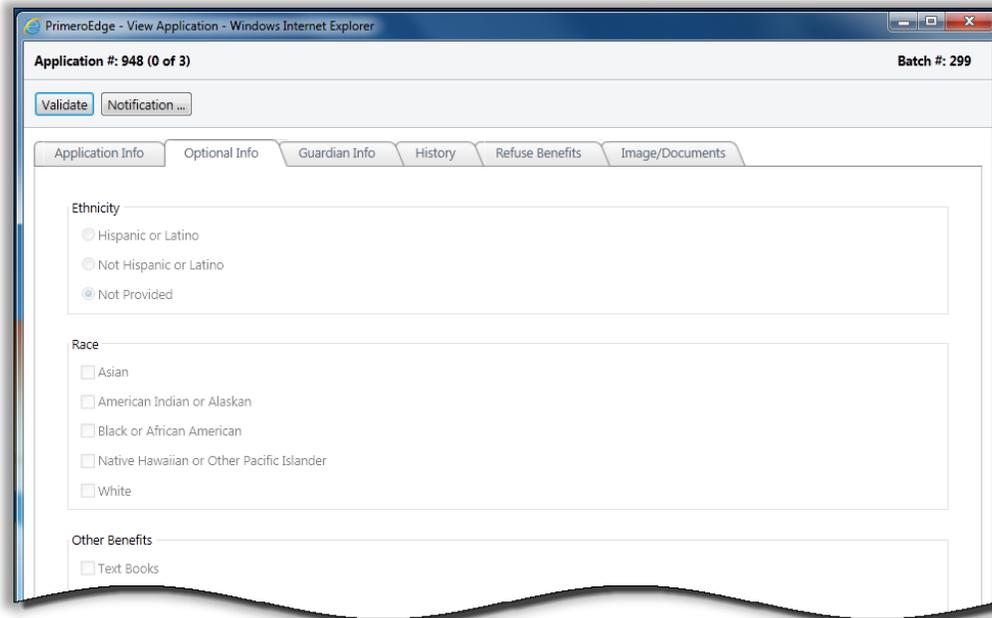
Students					
Student ID	Name	Site	Grade	Foster Student	Birth Date
2192	ABIGAIL P		11	<input type="checkbox"/>	10/1/1994
6672	ABBY R		02	<input type="checkbox"/>	6/10/2003

Household Members					
Name	Job	Alimony	Retirement	Other	No Income
ABIGAIL P	--	--	--	--	<input checked="" type="checkbox"/>
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.

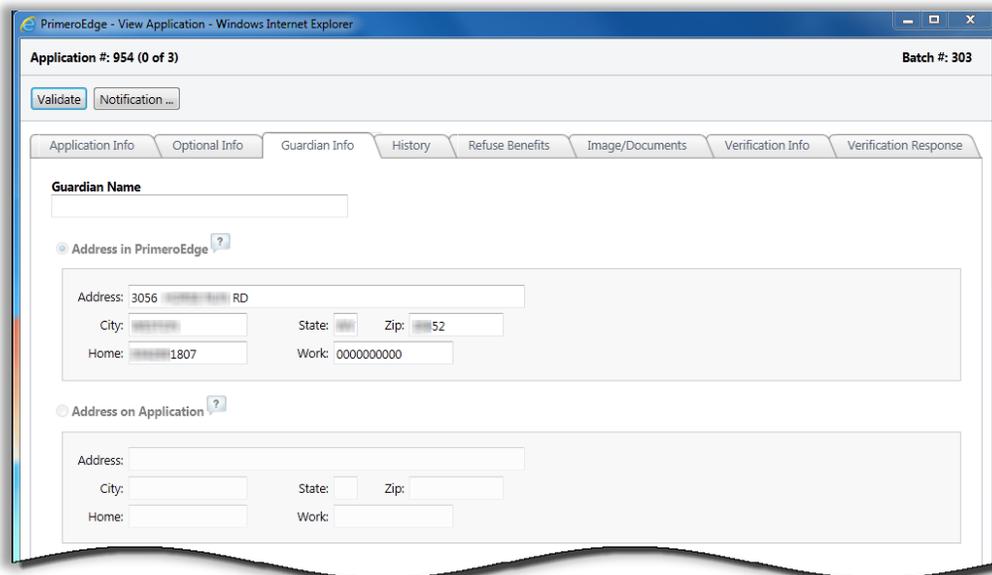
Tab 2: Optional Info

The **Optional Info** tab displays Ethnicity, Race and Other Benefits information collected from applications, if provided. See page 206 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**.

Application #: 952 (0 of 3) Batch #: 302

Validate Notification ...

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

Application Status Eligibility Basis End Date
Notified Free Income 7/31/2013

Application Status History

Application Status	Date / Time	Official
Notified	2/12/2013 5:04:39 PM	Cybersoft Support
Processed	7/31/2012 4:28:29 PM	Cybersoft Support

New Comment (Limited to 500 Characters)
Additional notification was performed due to past problems with mail delivery.

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

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

Application #: 952 (0 of 3) Batch #: 302

Validate Notification ...

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

Eligibility Basis
Free Income

Refuse Benefits

Result Start Date
Reduced 5/29/2013

Comments (Limited to 500 Characters)
Parent refuses to accept any further benefits

Refuse Benefits

User: Cybersoft Support

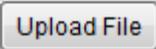
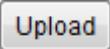
Tab 6: Image/Documents

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

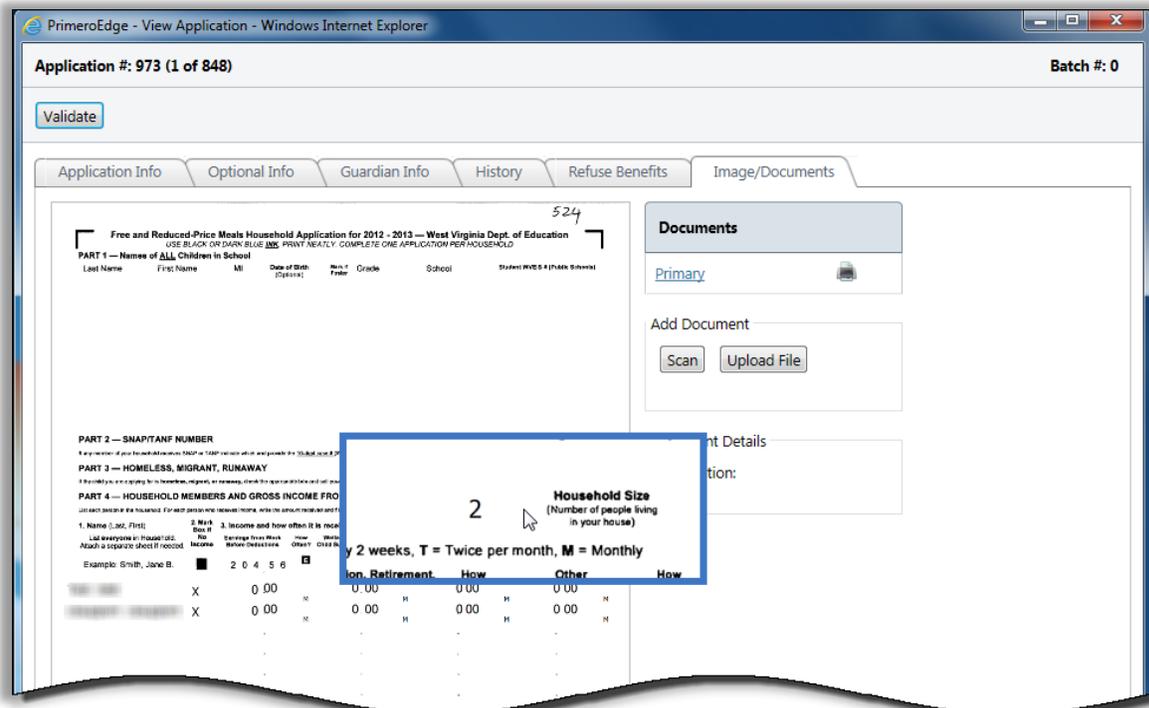
- Click  .
- Select a file and click  .
- Enter a name for the uploaded file in **Description** and click  .

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.

PrimerEdge - View Application - Windows Internet Explorer

Application #: 954 (0 of 3) Batch #: 303

Validate Notification ...

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

Application Number: 954

Area Name: Area 1

Eligibility: Reduced

Basis: Income

1st Notice Date: 1/4/2013

Follow Up Notice Date: 1/8/2013

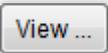
Response Due Date: 1/10/2013

User: [User ID]

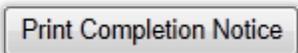
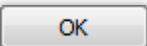
Tab 8: Verification Response

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 and print a notification of Verification Complete

- Click  .

To send a notification of Verification Complete to the printer

- Click  .
- Click  in the Windows print popup.

PrimerEdge - View Application - Windows Internet Explorer

Application #: 954 (0 of 3) Batch #: 303

Validate Notification ...

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

Verify Response Verification Result Summary

Verification Result: Reduced to Paid

Reason for Change: Change in SNAP/TANF

Change Date: 1/15/2013

Official: [User ID]

Completion Date: 1/10/2013 5:23 PM

Completion Notice Date: [Field]

View ... Print Completion Notice

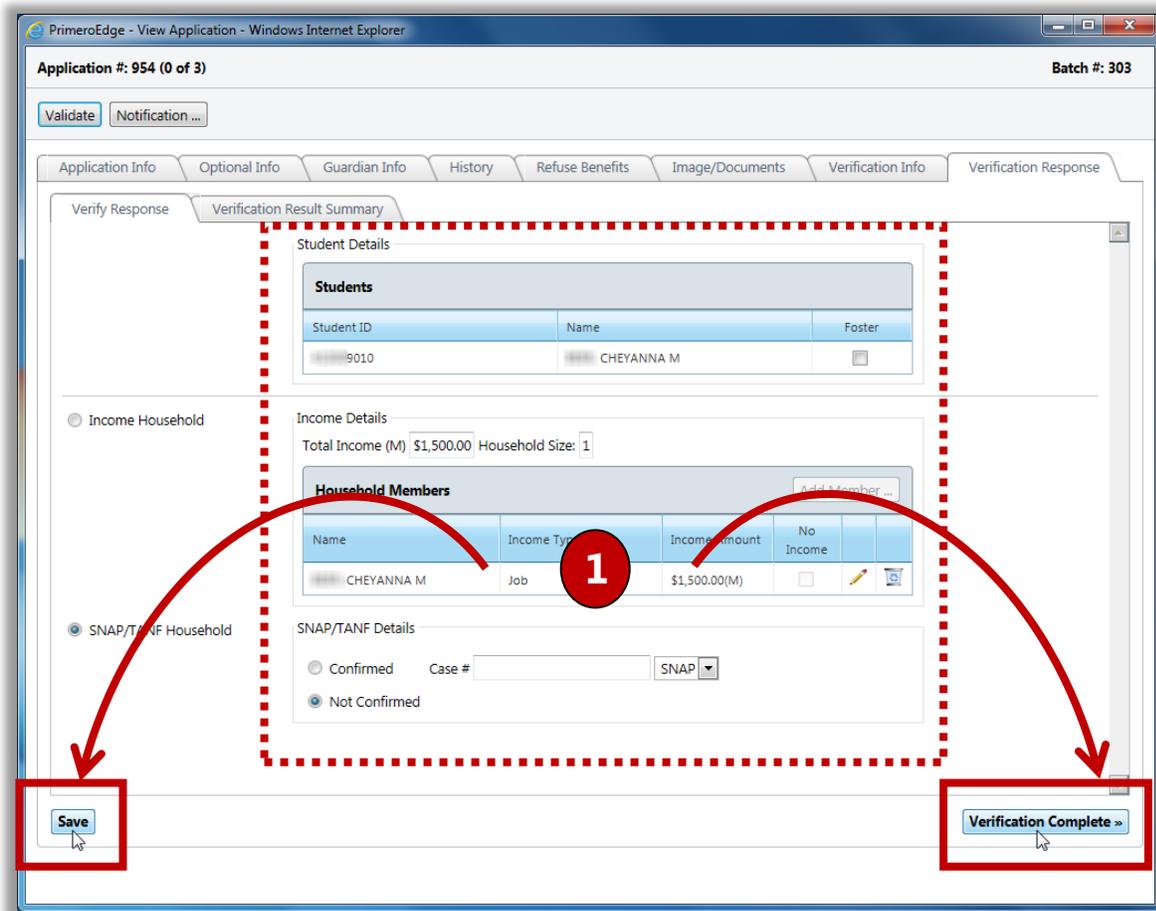
The **Verify Response** sub-tab allows for entry of student and income details when a response has been received from a parent or guardian regarding the application.

To only save new verification information

1. Enter new information.
2. Click  .

To save verification information and end the verification process for the application

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.

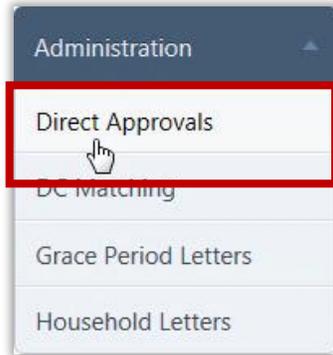
Administration at a Glance

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 Entries are 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. At the top, there is a search section with the following elements:

- 'Search By' with two radio buttons: 'Approval' (selected) and 'Student'.
- 'Academic Year' dropdown menu set to '2013 - 2014'.
- 'Approval Type' dropdown menu set to '-- SELECT --'.
- 'Approval ID' text input field.
- 'From' text input field with a calendar icon.
- 'To' text input field with a calendar icon.
- 'Apply' and 'Reset' buttons.

 Below the search section is a table header with the title 'Direct Approvals' and a 'New ...' button.

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

View Direct Approval

[← Back to Direct Approval List](#)

Summary | **Students**

File Number: 1069
 Approval Type: Direct Certification
 File Status: Processed
 Status Change Date: 4/29/2013
 User Name: Cybersoft Support

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

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

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

* - Will not appear within Matched Students tab.

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.

View Direct Approval

[← Back to Direct Approval List](#)

Summary | **Students**

Matched Students Exclude Previous Free Students Select All [Print All](#)

ID	Last Name	First Name	Site	Grade	Approval Date	Print
963032694	BEYERS	JASMINE	216	04	4/29/2013	

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.
3. Click  .
4. In the entry options, choose **Manual Entry**.
5. 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.
6. 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.

Direct Approvals

Search By: Approval Student

Academic Year: 2012 - 2013

Approval Type: -- SELECT --

Approval ID: From: To:

Apply Reset

Direct Approvals

New ...

1

New Direct Approval

[Back to Direct Approval List](#)

Approval Type: Direct Certification

Apply Reset

Cancel Process

2 **3**

New Direct Approval

[Back to Direct Approval List](#)

Approval Type: Direct Certification

Apply Reset

File Import Manual Entry

4

Students

Student ID	Last Name	First Name	Site	Grade	
960435470	BELL	KATELYN	312	3	
960427642	ROBERTS	DENNIS	150	10	

Cancel Process

5 **6**

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

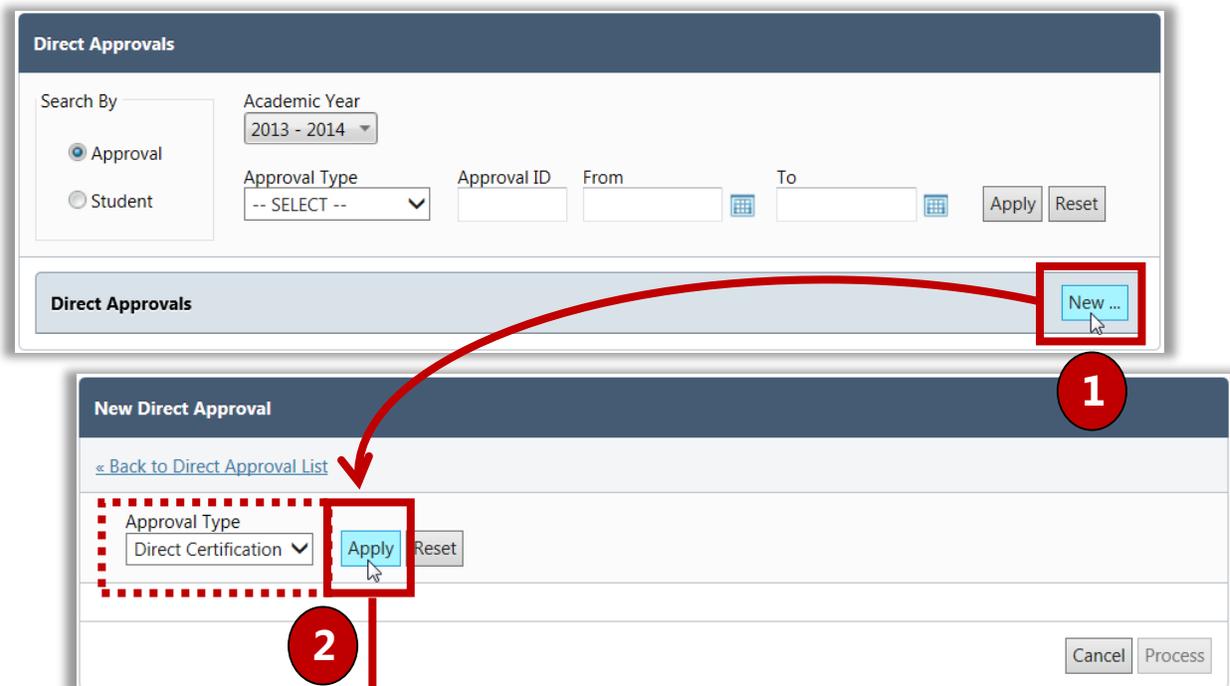
Total Students On File	
Total Students On File	2
Unmatched Students	0
Matched Students	2
SNAP	0
Non-SNAP	2
Prior Approval *	0
Inactive *	0

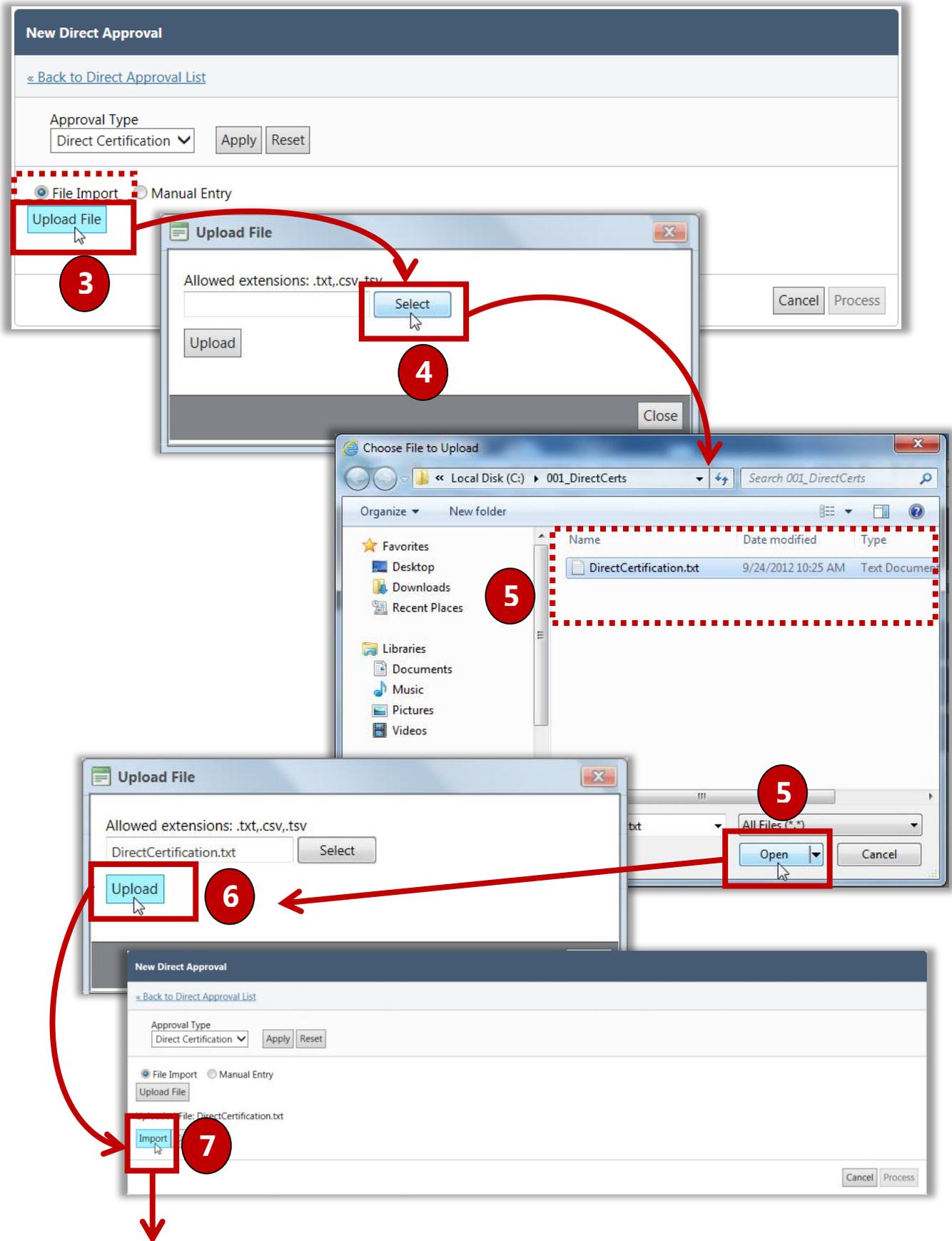
* - Will not appear within Matched Students tab.

Importing and Processing a Direct Approval File

To import and process a direct approval file

1. Click **New ...** .
2. In **Approval Type**, select “Direct Certification” and click **Apply** .
3. Choose “File Import” and click **Upload File** .
4. Click **Select** .
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: 00:00:01s

New Direct Approval

[Back to Direct Approval List](#)

Approval Type: Direct Certification

Preview

Student ID / SSN	Last Name	First Name	Site Code	Grade Code
7281	JONES	MAKENNA		
7282	RIFFLE	BRINLEIGH		
7283	ROBINSON	DEVIN		
7289	BARTON	BRIANNA		

Summary
Students on File: 4
Students Matching: 0

8 Cancel Process

New Direct Approval

[Back to Direct Approval List](#)

Approval Type: Direct Certification

Preview: 0% of Total Lines
Elapsed time: 00:00:00s

Preview

Student ID / SSN	Last Name	First Name	Site Code	Grade Code
410007281	JONES	MAKENNA		
410007282	RIFFLE	BRINLEIGH		
410007283	ROBINSON	DEVIN		
410007289	BARTON			

Summary
Students on File: 4
Students Matching: 0

View Direct Approval

[Back to Direct Approval List](#)

Summary Matched Students Unmatched Students

File Number: 1186
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

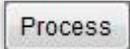
Eligibility Results

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

1 Search By: Approval Student. Academic Year: 2013 - 2014. Approval Type: Direct Certification. 

2 

3 [1070](#)

4 

View Direct Approval

Summary | Matched Students | Unmatched Students

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

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

* - Will not appear within Matched Students tab.

Viewing a Processed Direct Approval File

On the **Direct Approvals** page:

1. Select a year in **Academic Year** and select an approval type in **Approval Type**.



2. Click [Approval ID](#).
3. In an approval listing, click the [Approval ID](#) link.

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

Matched Students is the number of both active and inactive students that received Direct Certification benefits in this particular file.

Direct Approvals

Search By: Approval Student

Academic Year: 2012 - 2013

Approval Type: Direct Certification

Approval ID: [] From: [] To: []

Apply

Approval ID	Approval Type	Update Date	User	Total Students
1070	Direct Certification	5/7/2013 10:54 AM	Cybersoft Support	2
1069	Direct Certification	4/29/2013 2:59 PM	Cybersoft Support	1
1068	Direct Certification	4/19/2013 11:25 AM	Cybersoft Support	2
1065	Direct Certification	1/8/2013 12:13 AM	Cybersoft Support	2
1062	Direct Certification	12/6/2012 12:36 PM	Cybersoft Support	1
1061	Direct Certification	11/14/2012 3:14 PM	Cybersoft Support	2
1060	Direct Certification	11/14/2012 2:25 PM	Cybersoft Support	0
1057	Direct Certification	10/30/2012 5:01 PM	Cybersoft Support	1

On the **View Direct Approval** page:

1. Click the **Matched Students** tab.

The screenshot shows the 'View Direct Approval' interface. At the top, there is a navigation bar with the title 'View Direct Approval' and a link '« Back to Direct Approval List'. Below this, there are three tabs: 'Summary', 'Matched Students', and 'Unmatched Students'. The 'Matched Students' tab is highlighted with a red box, and a red circle with the number '1' is placed over it, indicating the step to click this tab. The 'Summary' section displays the following information:

- File Number: 1094
- Approval Type: Direct Certification
- File Status: Processed
- Status Change Date: 7/9/2012
- User Name: Cybersoft Support

Below the summary, there is a table showing student counts:

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

To the right of the summary is an 'Eligibility Results' table:

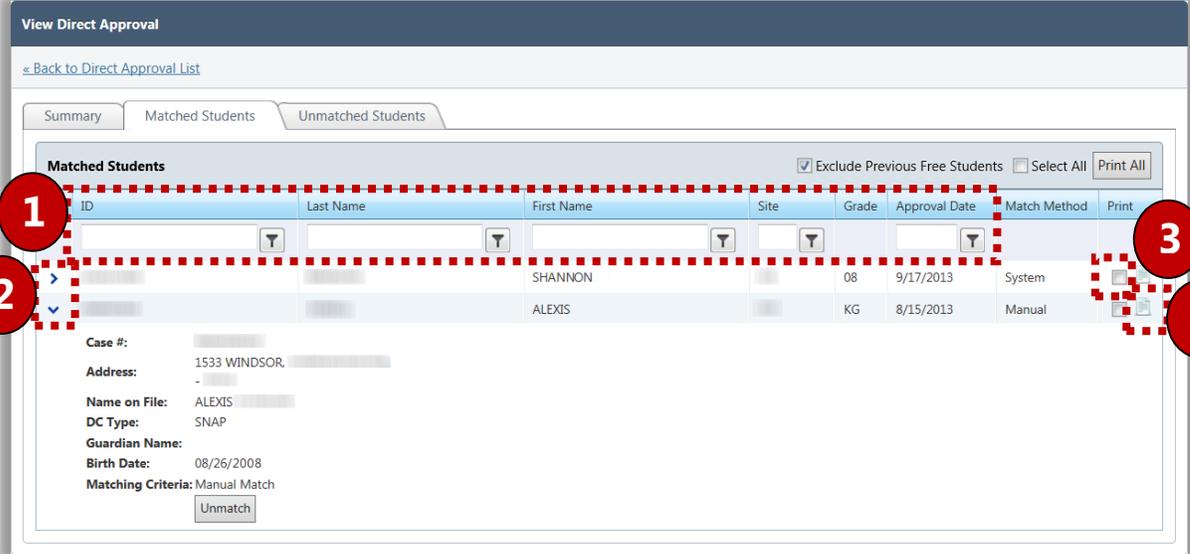
Reason	Total
Changed from REDUCED	9
Changed from PAID	556
Changed from FREE -- DCFOSTER	2
Changed from FREE -- DCSNAP	3
Changed from FREE -- DIRECTCERT	3
Changed from FREE -- FOSTER	1
Changed from FREE -- GRACEPERIOD	30
Changed from FREE -- INCOME	3
NEW Activations	0

At the bottom of the page, there is a note: '* - Will not appear within 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*.

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.
4. Select **View** () to display the notification letter in the print viewer window.



The screenshot shows the 'View Direct Approval' interface with the 'Matched Students' tab selected. The table below lists the students:

ID	Last Name	First Name	Site	Grade	Approval Date	Match Method	Print
		SHANNON		08	9/17/2013	System	
		ALEXIS		KG	8/15/2013	Manual	

Below the table, the details for the selected student (ALEXIS) are shown:

Case #: [redacted]
 Address: 1533 WINDSOR, [redacted]
 Name on File: ALEXIS [redacted]
 DC Type: SNAP
 Guardian Name:
 Birth Date: 08/26/2008
 Matching Criteria: Manual Match
 Unmatch

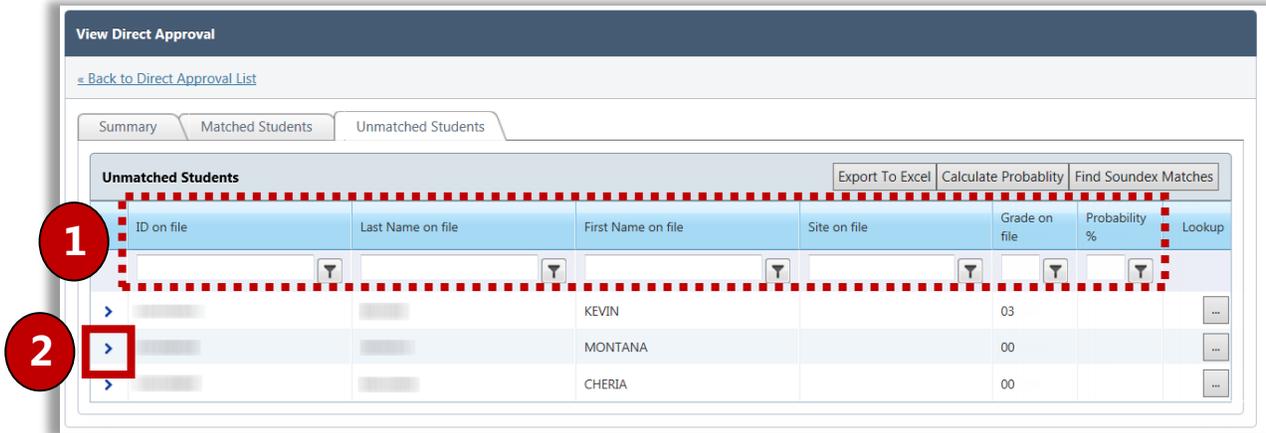
The **Unmatched Students** tab displays a list of all students in the import file that did not match a student in PrimeroEdge.

Possible reasons for unmatched students:

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

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.



Printing an Individual Notification Letter

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

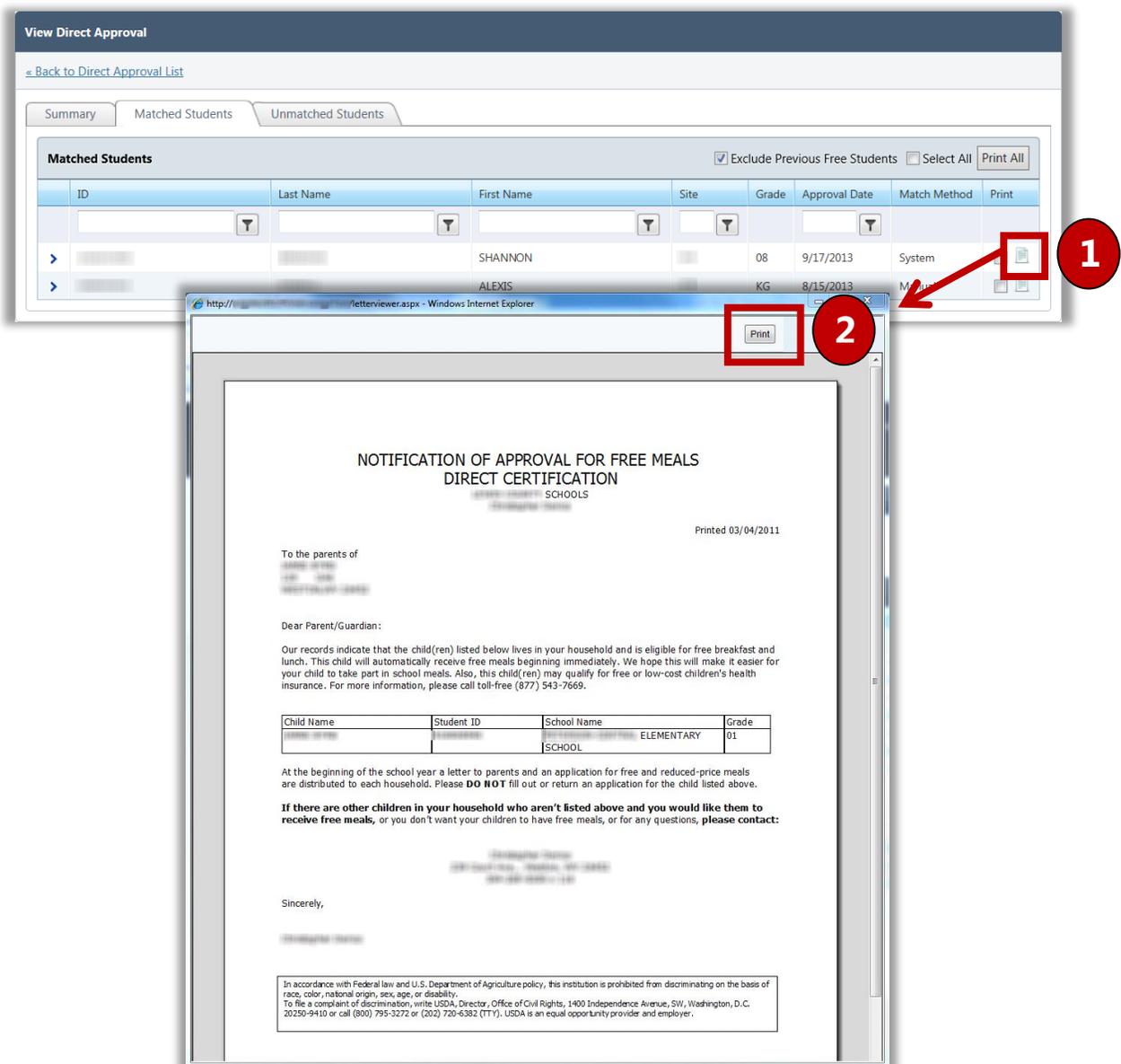
1. Click **Print** ().

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

2. Click  on the window toolbar.

3. In the Windows **Print** popup, click **Print** ().

The letter is sent to the selected printer.



View Direct Approval

[Back to Direct Approval List](#)

Summary Matched Students Unmatched Students

Matched Students Exclude Previous Free Students Select All **Print All**

ID	Last Name	First Name	Site	Grade	Approval Date	Match Method	Print
		SHANNON		08	9/17/2013	System	
		ALEXIS		KG	8/15/2013	M...	

Letter Viewer Window: **Print** ()

**NOTIFICATION OF APPROVAL FOR FREE MEALS
DIRECT CERTIFICATION**
SCHOOLS

Printed 03/04/2011

To the parents of
[Redacted]

Dear Parent/Guardian:

Our records indicate that the child(ren) listed below lives in your household and is eligible for free breakfast and lunch. This child will automatically receive free meals beginning immediately. We hope this will make it easier for your child to take part in school meals. Also, this child(ren) may qualify for free or low-cost children's health insurance. For more information, please call toll-free (877) 543-7669.

Child Name	Student ID	School Name	Grade
[Redacted]	[Redacted]	[Redacted] ELEMENTARY	01

At the beginning of the school year a letter to parents and an application for free and reduced-price meals are distributed to each household. Please **DO NOT** fill out or return an application for the child listed above.

If there are other children in your household who aren't listed above and you would like them to receive free meals, or you don't want your children to have free meals, or for any questions, please contact:

Sincerely,
[Redacted]

In accordance with Federal law and U.S. Department of Agriculture policy, this institution is prohibited from discriminating on the basis of race, color, national origin, sex, age, or disability. To file a complaint of discrimination, write USDA, Director, Office of Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410 or call (800) 795-3272 or (202) 720-6382 (TTY). USDA is an equal opportunity provider and employer.

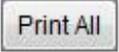
Printing Multiple Notification Letters

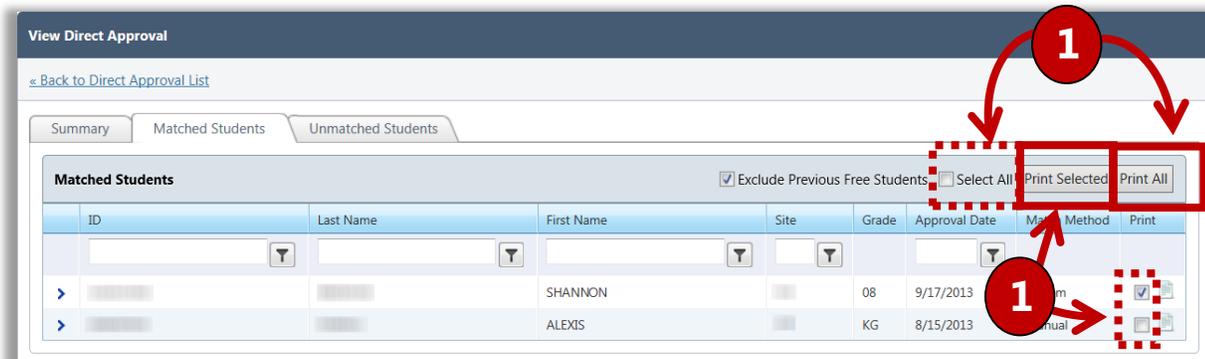
1. On the **Students** or **Matched Students** tab, do one of the following

Select **Select All** (add check mark) to select all student listings and click  .

- or -

Select in the **Print** column (add check mark) in one or more individual student listings and click  .

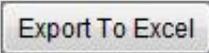
2. In the **Letter Address** group, select the address to include in the letter.
3. In the **Letter Format** group, select the letter format. Most commonly selected: System Address and Household format.
4. Click  .



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.

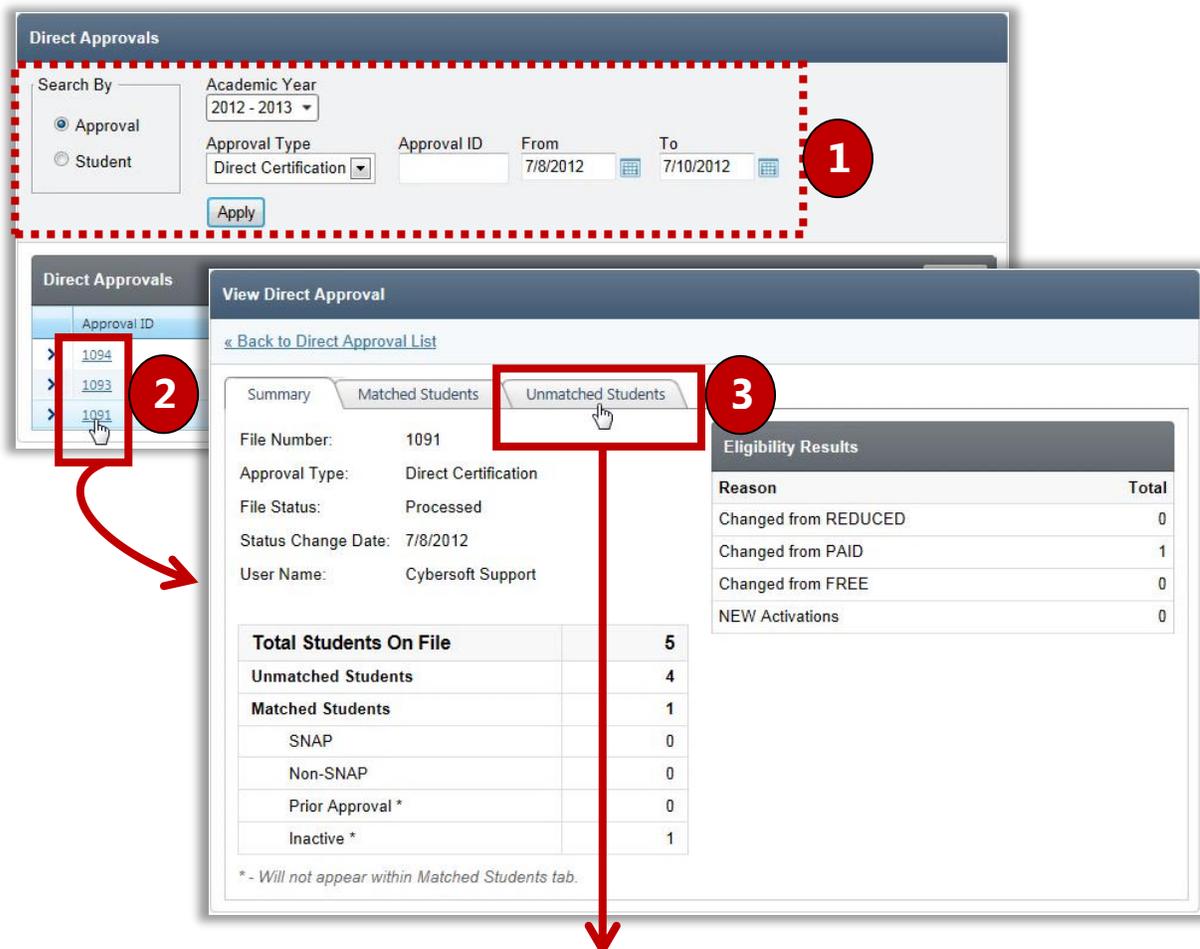
4. Click  .

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  .



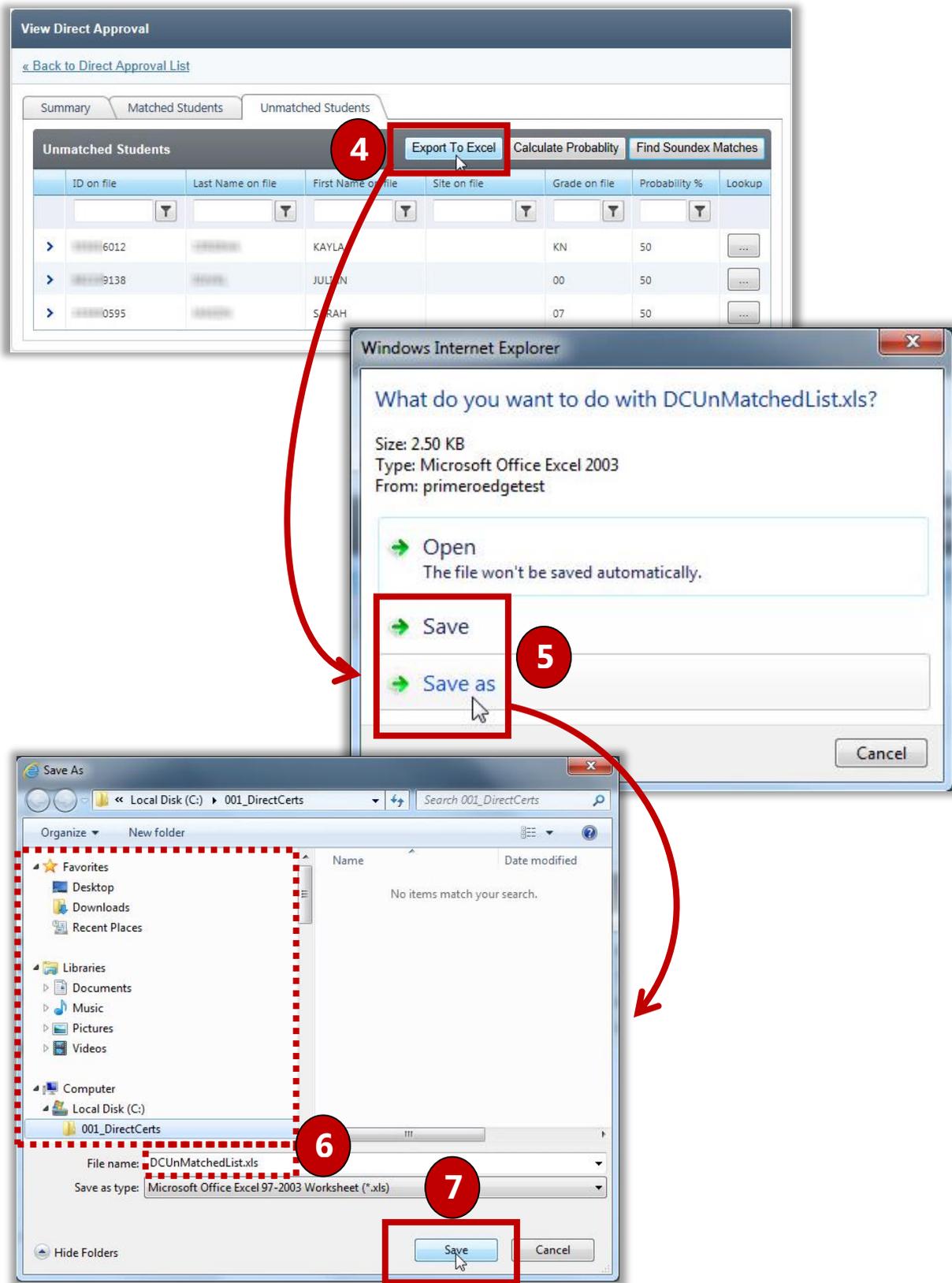
The screenshot illustrates the steps for exporting an unmatched students file. It shows the 'Direct Approvals' search interface with filters for Academic Year (2012 - 2013), Approval Type (Direct Certification), and dates (7/8/2012 to 7/10/2012). A red dashed box highlights the search area, labeled with a red circle '1'. Below, a list of approval IDs (1094, 1093, 1091) is shown, with a red box around the '1091' link, labeled with a red circle '2'. A red arrow points from the '1091' link to the 'View Direct Approval' page. In this view, the 'Unmatched Students' tab is selected, highlighted with a red box and labeled with a red circle '3'. The 'Eligibility Results' table shows the following data:

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

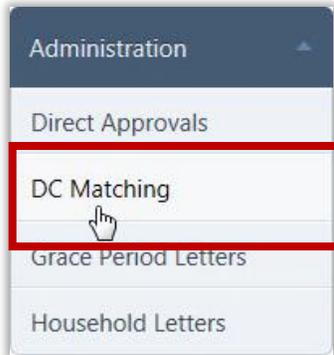
The 'Total Students On File' summary table shows:

Total Students On File	5
Unmatched Students	4
Matched Students	1
SNAP	0
Non-SNAP	0
Prior Approval *	0
Inactive *	1

* - Will not appear within Matched Students tab.



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 screenshot shows the 'DC Matching' interface. At the top, there are tabs for 'Sibling Match', 'Unmatched', and 'Previously Matched'. Below the tabs, there is a 'Method' section with radio buttons for 'By Household' (selected), 'By Address', 'By Guardian', and 'Manual', along with an 'Apply' button. The main content area is titled 'Sibling Matches by Household' and contains a table with columns: Matching Approval, Address, Student ID, Last Name, First Name, Site, and Grade. A 'Process Matches' button and a 'Refresh' icon are located in the top right of the table area. The table lists ten students, with the first student (MASON) in group 1 and the remaining nine students in group 2.

Matching Approval	Address	Student ID	Last Name	First Name	Site	Grade
MASON	View	5327	MASON	MARIAH	WINDY HILLS HIGH SCHOOL	11
NATHAN	View	8924	FRANKLIN	CRYSTAL	WINDY HILLS ELEMENTARY SCHOOL	PK
NETTIE	View	5093	WINDY	ALMA	WINDY HILLS HIGH SCHOOL	12
NYUGEN	View	11122	WINDY	TRENTON	WINDY HILLS ELEMENTARY SCHOOL	04
RUSSELL	View	7766	WINDY	KAITLYN	WINDY HILLS ELEMENTARY SCHOOL	04
RYAN	View	4930	WINDY	JOSEPH	WINDY HILLS HIGH SCHOOL	12
SAMANTHA	View	7856	WINDY	KENDRA	WINDY HILLS HIGH SCHOOL	12
SARAH	View	8819	WINDY	SHELBY	WINDY HILLS ELEMENTARY SCHOOL	KG
SUMMERL	View	7372	WINDY	KRISTEN	WINDY HILLS HIGH SCHOOL	12
TYLOR ZACHARY	View	5116	WINDY	LISA	WINDY HILLS HIGH SCHOOL	12

1

2

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.

DC Matching

Sibling Match Unmatched Previously Matched

Method

By Household By Address By Guardian Manual **Apply** 1

DC Matching

Sibling Match Unmatched Previously Matched

Method

By Household By Address By Guardian Manual **Apply**

Sibling Matches by Household **Process Matches** Refresh

Matching Approval	Student ID	Last Name	First Name	Site	Grade
<input type="checkbox"/>	5327	MARIAH	MARIAH	HIGH SCHOOL	11
<input type="checkbox"/>	8924	CRYSTAL	CRYSTAL	ELEMENTARY SCHOOL	PK
<input type="checkbox"/>				HIGH SCHOOL	12
<input type="checkbox"/>				ELEMENTARY SCHOOL	04
<input type="checkbox"/>				ELEMENTARY SCHOOL	04
<input type="checkbox"/>				HIGH SCHOOL	12
<input type="checkbox"/>				HIGH SCHOOL	12
<input type="checkbox"/>				ELEMENTARY SCHOOL	KG
<input type="checkbox"/>				HIGH SCHOOL	12

Close 3

DC Matching

Sibling Match Unmatched Previously Matched

Method

By Household By Address By Guardian Manual **Apply**

Sibling Matches by Household **Process Matches** Refresh

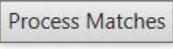
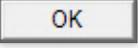
Matching Approval	Address	Student ID	Last Name	First Name	Site	Grade
<input type="checkbox"/>		5327	MARIAH	MARIAH	HIGH SCHOOL	11
<input type="checkbox"/>		8924	CRYSTAL	CRYSTAL	ELEMENTARY SCHOOL	PK
<input type="checkbox"/>		5093	ALMA	ALMA	HIGH SCHOOL	12
<input type="checkbox"/>			TRENTON		ELEMENTARY SCHOOL	04

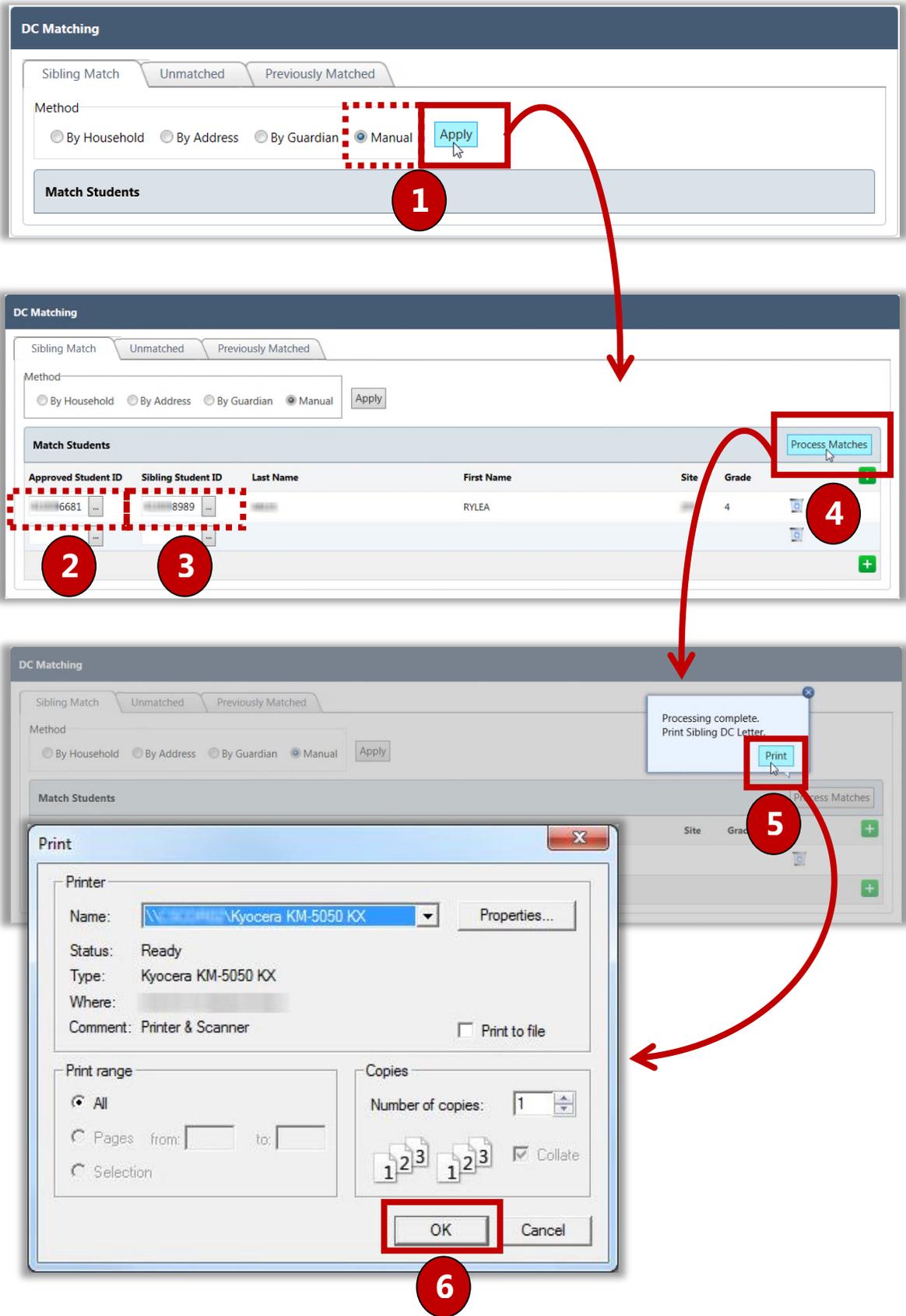
Process Matches 5

4

Matching Manually

To manually match siblings

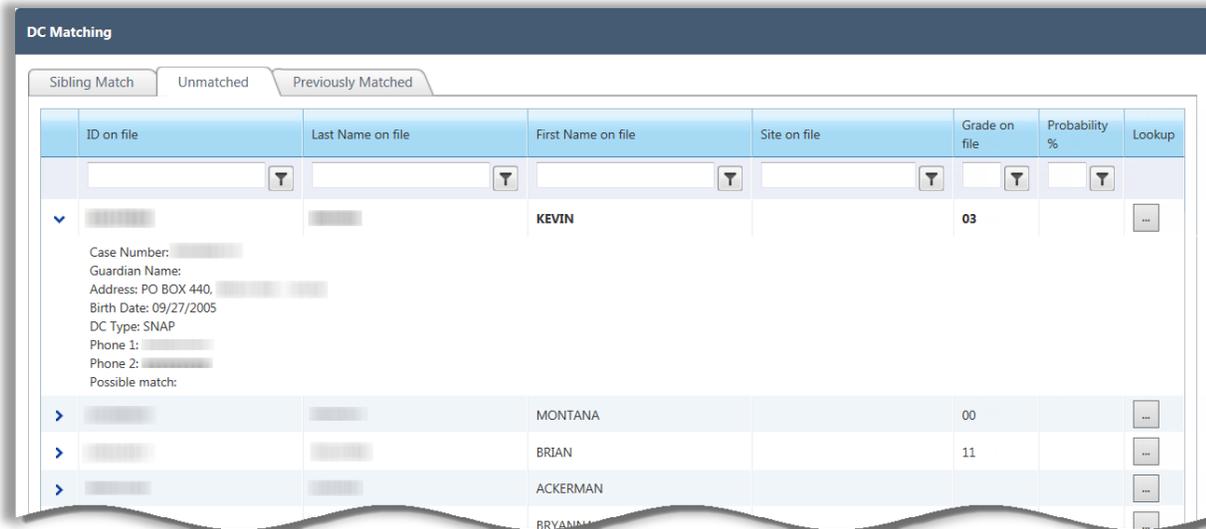
1. In the **Method** section, choose “Manual” and click  .
2. In **Approved Student ID**, click **Lookup** () to select a student.
3. In **Sibling Student ID**, click **Lookup** () to select a sibling student to be matched to the approved student.
4. Click  . When processing is complete, a **Print**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



Viewing Unmatched Students

The **Unmatched** tab automatically displays students who have been unmatched using the **Previously Matched** tab. To filter the results, enter search criteria in the column heading and

click  to select filter criteria.



Viewing Previously Matched Students

The **Previously Matched** tab automatically displays students that have been matched during the current school year. To display students matched during a different school year or to filter the

results, enter search criteria in the search section and click the **Apply** button.

The screenshot shows the 'DC Matching' application interface. At the top, there are three tabs: 'Sibling Match', 'Unmatched', and 'Previously Matched'. The 'Previously Matched' tab is selected. Below the tabs, there is a search section with the following fields and options:

- Academic Year:** 2013 - 2014 (dropdown)
- Area:** SCHOOLS (dropdown)
- Site Code:** -- ALL -- (dropdown)
- Site:** -- ALL -- (dropdown)
- SSN / Student ID:** (text input)
- Last Name:** (text input)
- First Name:** (text input)
- Grade:** --All-- (dropdown)
- Status:** Active (dropdown)
- From:** (calendar input)
- To:** (calendar input)
- Match Method:** System (checkbox), Sibling (checkbox), Manual (checkbox)
- Buttons:** Apply, Reset

Below the search section is a table titled 'Matched Students'. The table has columns for ID, Last Name, First Name, Site, Grade, Approval Date, Match Method, and Print. The first row is expanded to show student details:

- ID:** [Redacted]
- Last Name:** [Redacted]
- First Name:** NICHOLAS
- Site:** [Redacted]
- Grade:** 04
- Approval Date:** 7/3/2013
- Match Method:** Manual
- Print:** [Print icon]

Additional details for the first student:

- Case #:** [Redacted]
- Address:** 16 BRENTWOOD DR., [Redacted]
- Name on File:** NICHOLAS [Redacted]
- DC Type:** N/A
- Guardian Name:** LEE ANN [Redacted]
- Birth Date:** 06/20/2002
- Matching Criteria:** Manual Match
- Buttons:** Unmatch

Other students in the list include:

- ADDISON** (Grade PK, Approval Date 7/26/2013)
- DAKOTA** (Grade 02, Approval Date 8/20/2013)

Unmatching Previously Matched Students

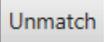
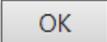
The following criteria must be met in order to unmatch students:

- “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.

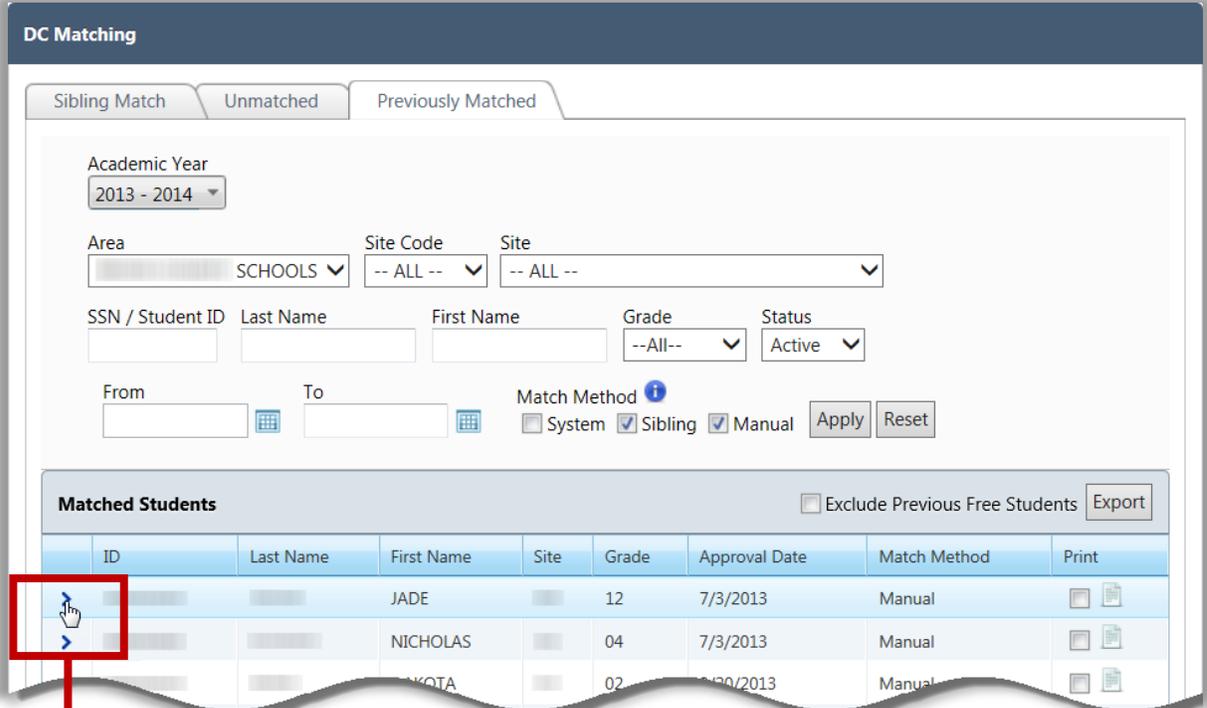
After students are unmatched, the following actions occur:

- 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 shows the 'DC Matching' interface with the 'Previously Matched' tab selected. The 'Matched Students' table is visible with the following data:

ID	Last Name	First Name	Site	Grade	Approval Date	Match Method	Print
[REDACTED]	[REDACTED]	JADE	[REDACTED]	12	7/3/2013	Manual	[Print Icon]
[REDACTED]	[REDACTED]	NICHOLAS	[REDACTED]	04	7/3/2013	Manual	[Print Icon]
[REDACTED]	[REDACTED]	KOTA	[REDACTED]	02	7/30/2013	Manual	[Print Icon]

Next Page

DC Matching

Sibling Match | Unmatched | Previously Matched

Academic Year: 2013 - 2014

Area: [SCHOOLS] | Site Code: [-- ALL --] | Site: [-- ALL --]

SSN / Student ID: [] | Last Name: [] | First Name: [] | Grade: [--All--] | Status: Active

From: [] | To: [] | Match Method: System Sibling Manual | Apply | Reset

Matched Students Exclude Previous Free Students | Export

ID	Last Name	First Name	Site	Grade	Approval Date	Match Method	Print
[]	[]	JADE	[]	12	7/3/2013	Manual	[] []

Case #: []
 Address: 1115 HOMEWOOD RD, []
 Name on File: JADE []
 DC Type: N/A
 Guardian Name: KELLI []
 Birth Date: 12/08/1995
 Matching Criteria: Manual Match

Unmatch Comments

Comment (Limited to 500 Characters)
 Incorrect match.

OK | Cancel

Student [] was successfully unmatched.

DC Matching

Sibling Match | Unmatched | Previously Matched

Academic Year: 2013 - 2014

Area: [SCHOOLS] | Site Code: [-- ALL --] | Site: [-- ALL --]

SSN / Student ID: [] | Last Name: [] | First Name: [] | Grade: [--All--] | Status: Active

From: [] | To: [] | Match Method: System Sibling Manual | Apply | Reset

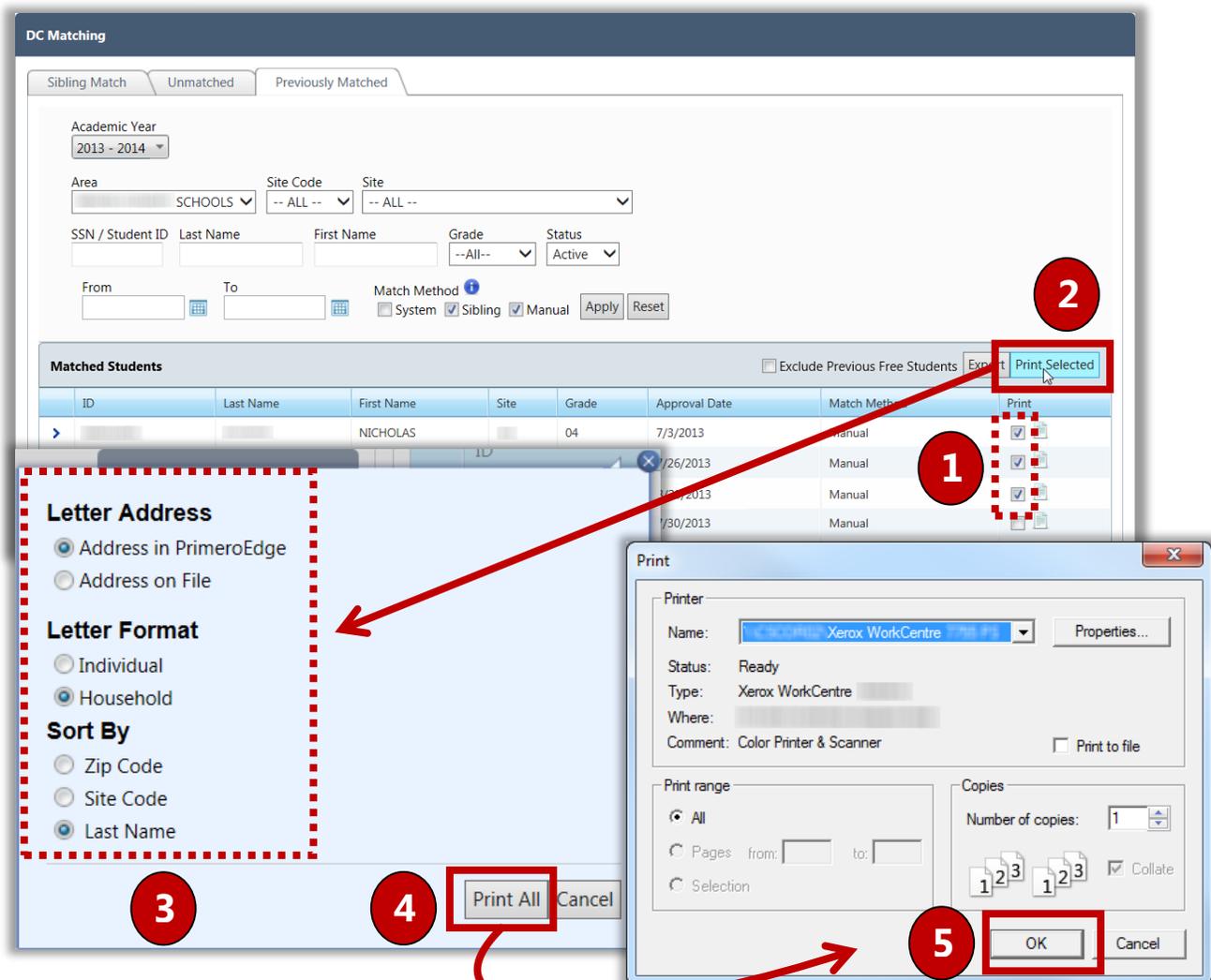
Matched Students Exclude Previous Free Students | Export

ID	Last Name	First Name	Site	Grade	Approval Date	Match Method	Print
960032841	[]	NICHOLAS	[]	04	7/3/2013	Manual	[] []
960039632	[]	ADDISON	[]	PK	7/26/2013	Manual	[] []

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 **Print Selected**.
3. Make the following selections:
 - **Letter Address** – the address to be used on the letters.
 - **Letter Format** – the format to be used for the letters.
 - **Sort By** – the order the letters are to be sorted when printing.
4. Click **Print All**.
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.

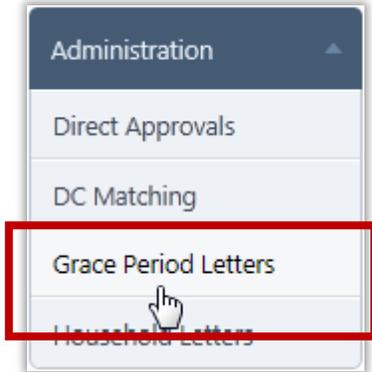
The screenshot shows the 'DC Matching' application interface. At the top, there are tabs for 'Sibling Match', 'Unmatched', and 'Previously Matched'. Below these are filters for 'Academic Year' (2013 - 2014), 'Area' (WOOD COUNTY SCHOOLS), 'Site Code' (-- ALL --), and 'Site' (-- ALL --). There are also 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 displayed below the filters. It has columns for ID, Last Name, First Name, Site, Grade, Approval Date, Match Method, and Print. The table contains three rows of data:

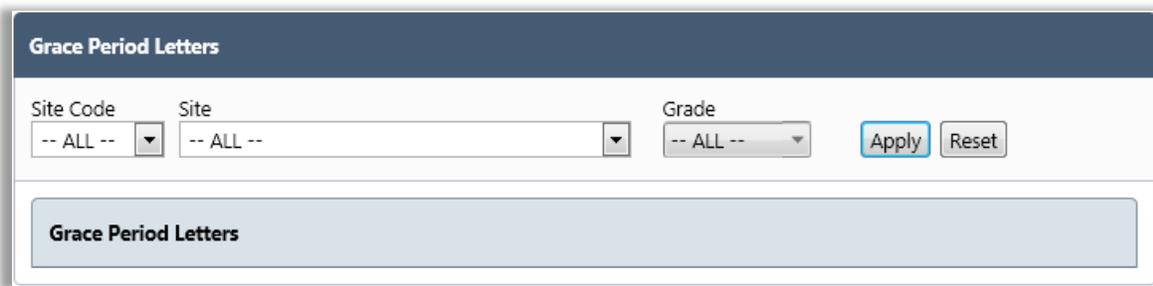
ID	Last Name	First Name	Site	Grade	Approval Date	Match Method	Print
>		NICHOLAS		04	7/3/2013	Manual	
>		ADDISON		PK	7/26/2013	Manual	
>				02	7/26/2013	Manual	

An 'Export' button is located in the top right corner of the table area, circled in red with a '1' next to it. A red arrow points from this button to a file dialog box below. The dialog box asks 'Do you want to open or save **cncert.csv** from [redacted]?' and has 'Open', 'Save', and 'Cancel' buttons. The 'Open' button is circled in red with a '2' next to it.

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”.

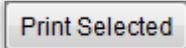
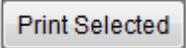
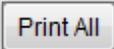
Button	Description
	Click to display a list of students that match the selected conditions.
	Click to return all settings in the search condition fields to the default values.

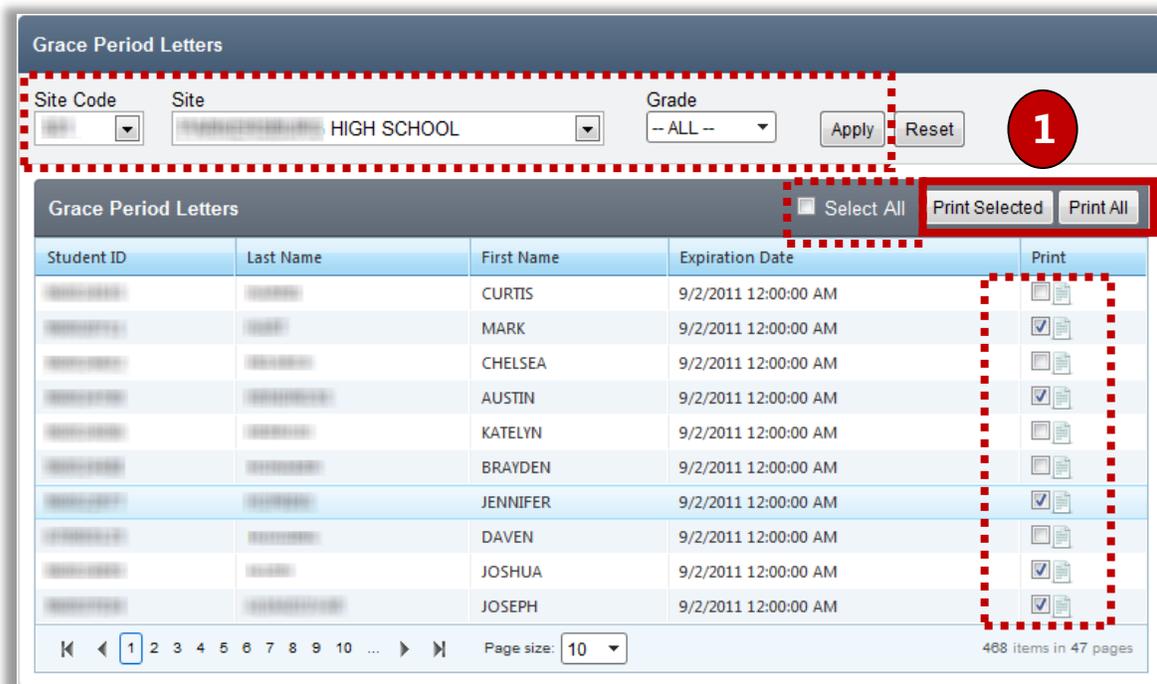
Printing Letters

Grace Period letters can be printed for

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

To print 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.
 - Click  to print all Grace Period letters.



The screenshot shows the 'Grace Period Letters' interface. At the top, there are search filters for Site Code, Site (set to HIGH SCHOOL), and Grade (set to -- ALL --). An 'Apply' button is highlighted with a red circle and the number 1. Below the filters, there are buttons for 'Select All', 'Print Selected', and 'Print All'. The main table lists students with columns for Student ID, Last Name, First Name, Expiration Date, and Print. The 'Print' column contains checkboxes and document icons. A red dashed box highlights the 'Print' column, and a red circle with the number 2 is next to it. At the bottom, there is a pagination bar showing page 1 of 47 pages and a page size of 10.

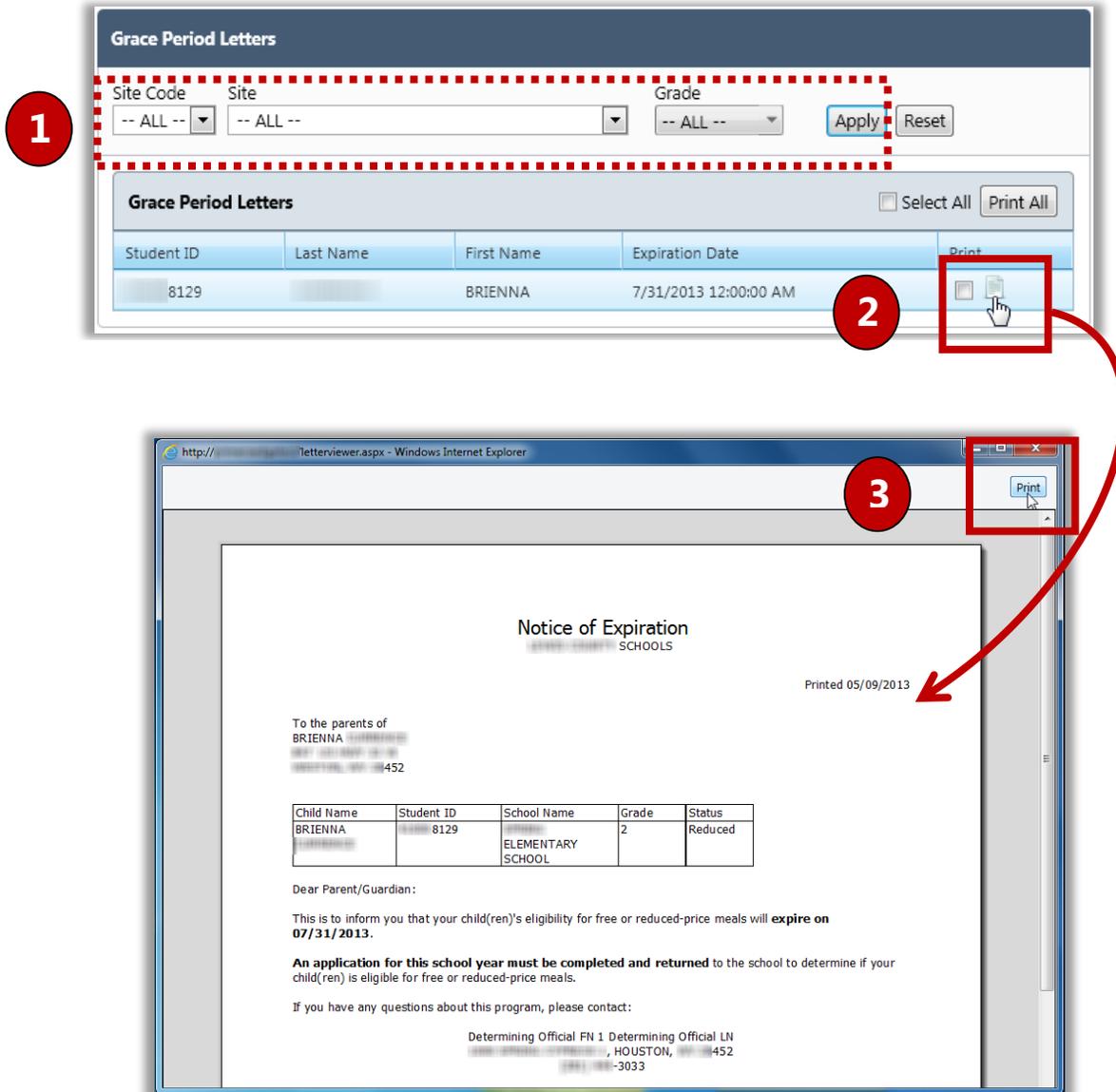
Student ID	Last Name	First Name	Expiration Date	Print
		CURTIS	9/2/2011 12:00:00 AM	<input type="checkbox"/>
		MARK	9/2/2011 12:00:00 AM	<input checked="" type="checkbox"/>
		CHELSEA	9/2/2011 12:00:00 AM	<input type="checkbox"/>
		AUSTIN	9/2/2011 12:00:00 AM	<input checked="" type="checkbox"/>
		KATELYN	9/2/2011 12:00:00 AM	<input type="checkbox"/>
		BRAYDEN	9/2/2011 12:00:00 AM	<input type="checkbox"/>
		JENNIFER	9/2/2011 12:00:00 AM	<input checked="" type="checkbox"/>
		DAVEN	9/2/2011 12:00:00 AM	<input type="checkbox"/>
		JOSHUA	9/2/2011 12:00:00 AM	<input checked="" type="checkbox"/>
		JOSEPH	9/2/2011 12:00:00 AM	<input checked="" type="checkbox"/>

Viewing Letters

An individual Grace Period letter can be viewed before printing.

To view a Grace Period letter

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



1

Grace Period Letters

Site Code: -- ALL -- Site: -- ALL -- Grade: -- ALL -- **Apply** Reset

Grace Period Letters Select All **Print All**

Student ID	Last Name	First Name	Expiration Date	Print
8129		BRIENNA	7/31/2013 12:00:00 AM	

2

3

Print

Printed 05/09/2013

Notice of Expiration
HOUSTON ISD SCHOOLS

To the parents of
BRIENNA
HOUSTON ISD SCHOOLS
HOUSTON, TX 77045

Child Name	Student ID	School Name	Grade	Status
BRIENNA	8129	ELEMENTARY SCHOOL	2	Reduced

Dear Parent/Guardian:

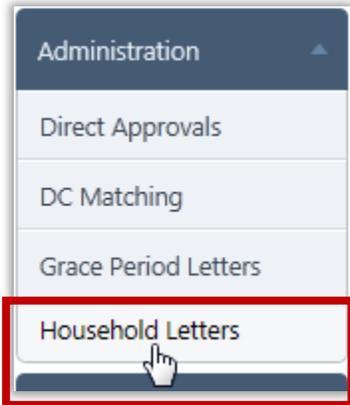
This is to inform you that your child(ren)'s eligibility for free or reduced-price meals will **expire on 07/31/2013**.

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:

Determining Official FN 1 Determining Official LN
HOUSTON, TX 77045
-3033

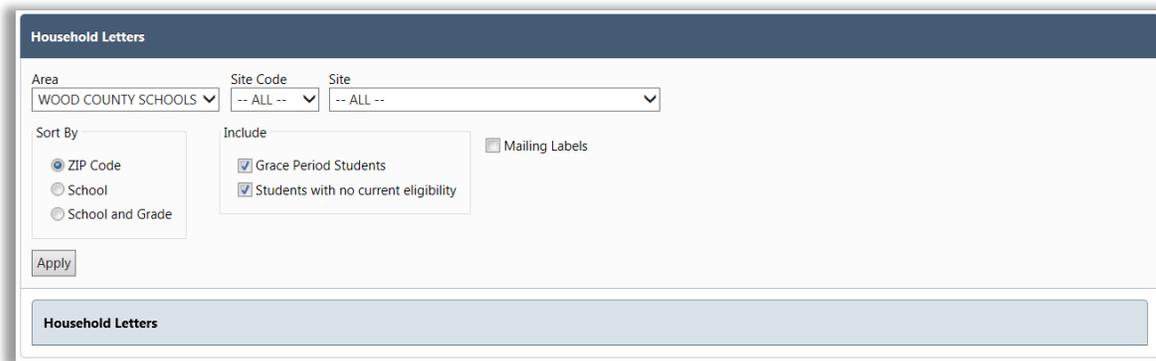
Household Letters



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 enabled (checkmark applied).

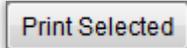
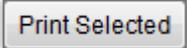
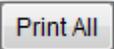
Button	Description
	Click to display a list of records that match the selected conditions.

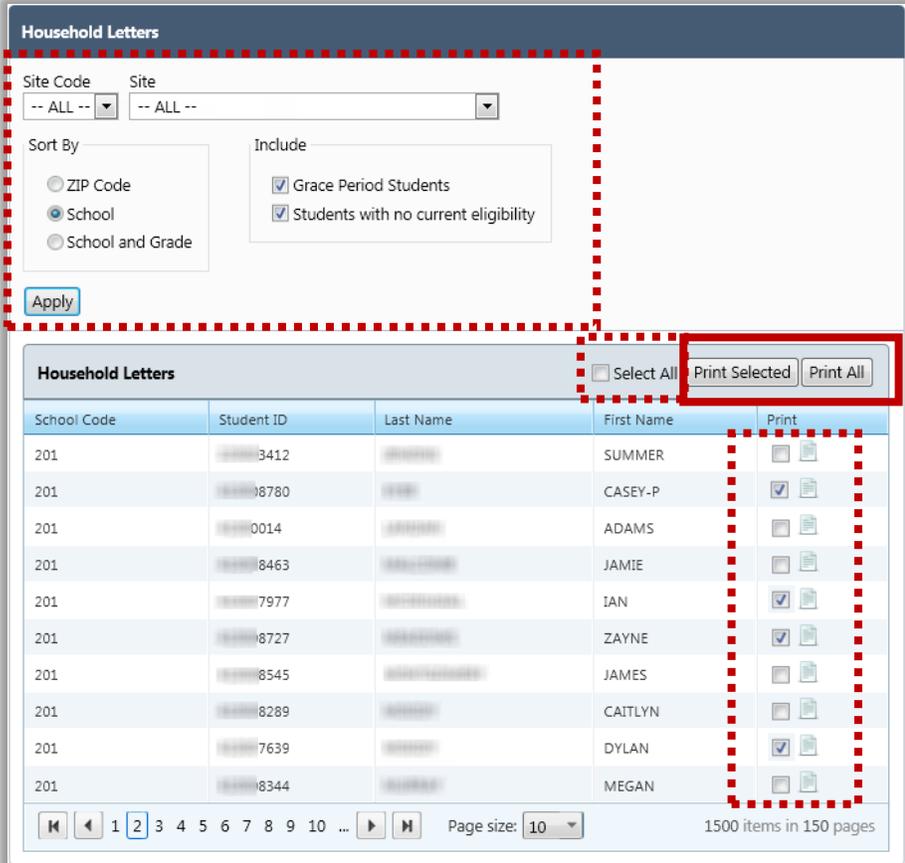
Printing Letters

Household Letters can be printed for

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

To print 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.



Household Letters

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

Sort By: ZIP Code School School and Grade

Include: Grace Period Students Students with no current eligibility

Select All

School Code	Student ID	Last Name	First Name	Print
201	3412		SUMMER	<input type="checkbox"/>
201	8780		CASEY-P	<input checked="" type="checkbox"/>
201	0014		ADAMS	<input type="checkbox"/>
201	8463		JAMIE	<input type="checkbox"/>
201	7977		IAN	<input checked="" type="checkbox"/>
201	8727		ZAYNE	<input checked="" type="checkbox"/>
201	8545		JAMES	<input type="checkbox"/>
201	8289		CAITLYN	<input type="checkbox"/>
201	7639		DYLAN	<input checked="" type="checkbox"/>
201	8344		MEGAN	<input type="checkbox"/>

Page size: 10 1500 items in 150 pages

Viewing Letters

An individual Household Letter can be viewed before printing.

To view a Household Letter

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

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

Printed : 05/09/2013

To the parents of
AUSTIN [REDACTED] RD
[REDACTED] 101

Dear Parent/Guardian:

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

Child Name	Student ID	School Name	Grade
AUSTIN [REDACTED]	8593	[REDACTED] ELEMENTARY SCHOOL	KG
BENJAMIN [REDACTED]	6726	[REDACTED] ELEMENTARY SCHOOL	01

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

2. Who can get free meals? Children in households getting Supplemental Nutrition Assistance Program (SNAP) benefits (formerly the

<<End of Section>>

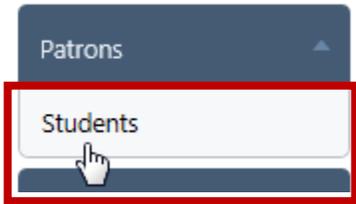
4

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.

The screenshot shows the 'Students' page with the following elements:

- Filters:** Site Code (dropdown: -- ALL --), Site (text input: -- ALL --), Grade (dropdown: --All--).
- Search Fields:** Student ID / SSN, Last Name, First Name, Status (dropdown: Active).
- Buttons:** Apply, Reset.
- Table:** A table with columns: ID, Last Name, First Name, School, Grade, Birth Date. Below the table, it says 'No records to display.'
- Actions:** An 'Add ...' button is located in the top right of the table area.

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

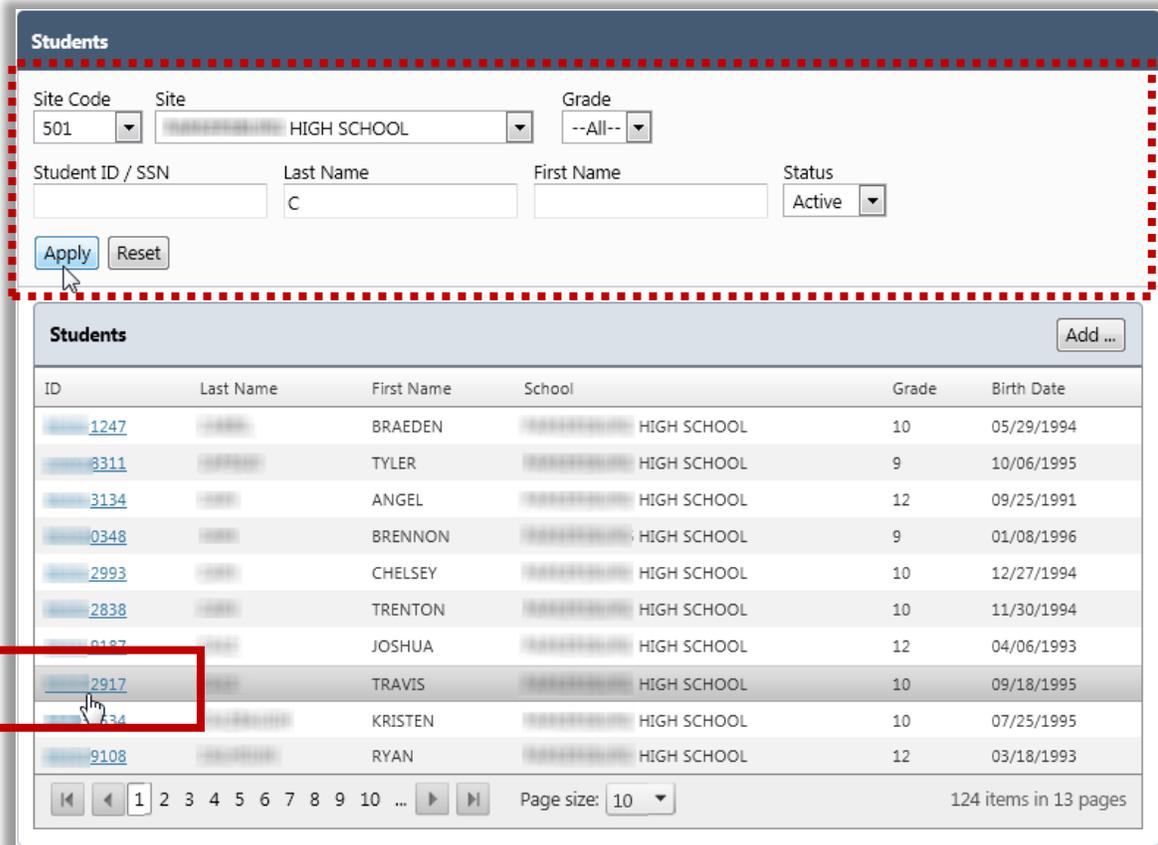
- **Site Code / Site** is set to “ALL”.
- **Grade** is set to “All”.
- Student ID / SSN, Last Name, and First Name are blank (empty).
- **Status** is set to “Active”.

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.



Students

Site Code: 501 | Site: HIGH SCHOOL | Grade: --All--

Student ID / SSN: | Last Name: C | First Name: | Status: Active

[Apply](#) [Reset](#)

ID	Last Name	First Name	School	Grade	Birth Date
1247	BRAEDEN		HIGH SCHOOL	10	05/29/1994
3311	TYLER		HIGH SCHOOL	9	10/06/1995
3134	ANGEL		HIGH SCHOOL	12	09/25/1991
0348	BRENNON		HIGH SCHOOL	9	01/08/1996
2993	CHELSEY		HIGH SCHOOL	10	12/27/1994
2838	TRENTON		HIGH SCHOOL	10	11/30/1994
0167	JOSHUA		HIGH SCHOOL	12	04/06/1993
2917	TRAVIS		HIGH SCHOOL	10	09/18/1995
234	KRISTEN		HIGH SCHOOL	10	07/25/1995
9108	RYAN		HIGH SCHOOL	12	03/18/1993

Page size: 10 | 124 items in 13 pages

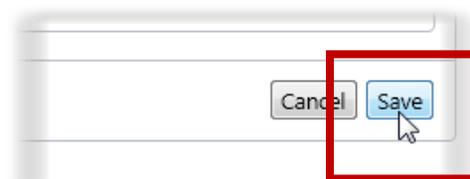
The **Student Details** page appears with seven tabs of information for the student. Some information can be updated while other information cannot be changed.

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: TRAVIS - 2917

[← Back to Students](#)

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

First Name: TRAVIS
 Last Name: [REDACTED]
 Middle Name: [REDACTED]
 SSN: [REDACTED] 4098
 Phone: [REDACTED] 4512
 Address: [REDACTED] RD
 Apt: [REDACTED]
 City: [REDACTED]
 State: [REDACTED]
 Zip: [REDACTED] 142

Site: [REDACTED] HIGH SCHOOL
 Grade: 10
 Homeroom: MATH V

Student ID: [REDACTED]:2917
 PIN: [REDACTED]:2917

Eligibility

Eligibility	Reason	Expiration Date
Paid	DEFAULT	7/31/2013

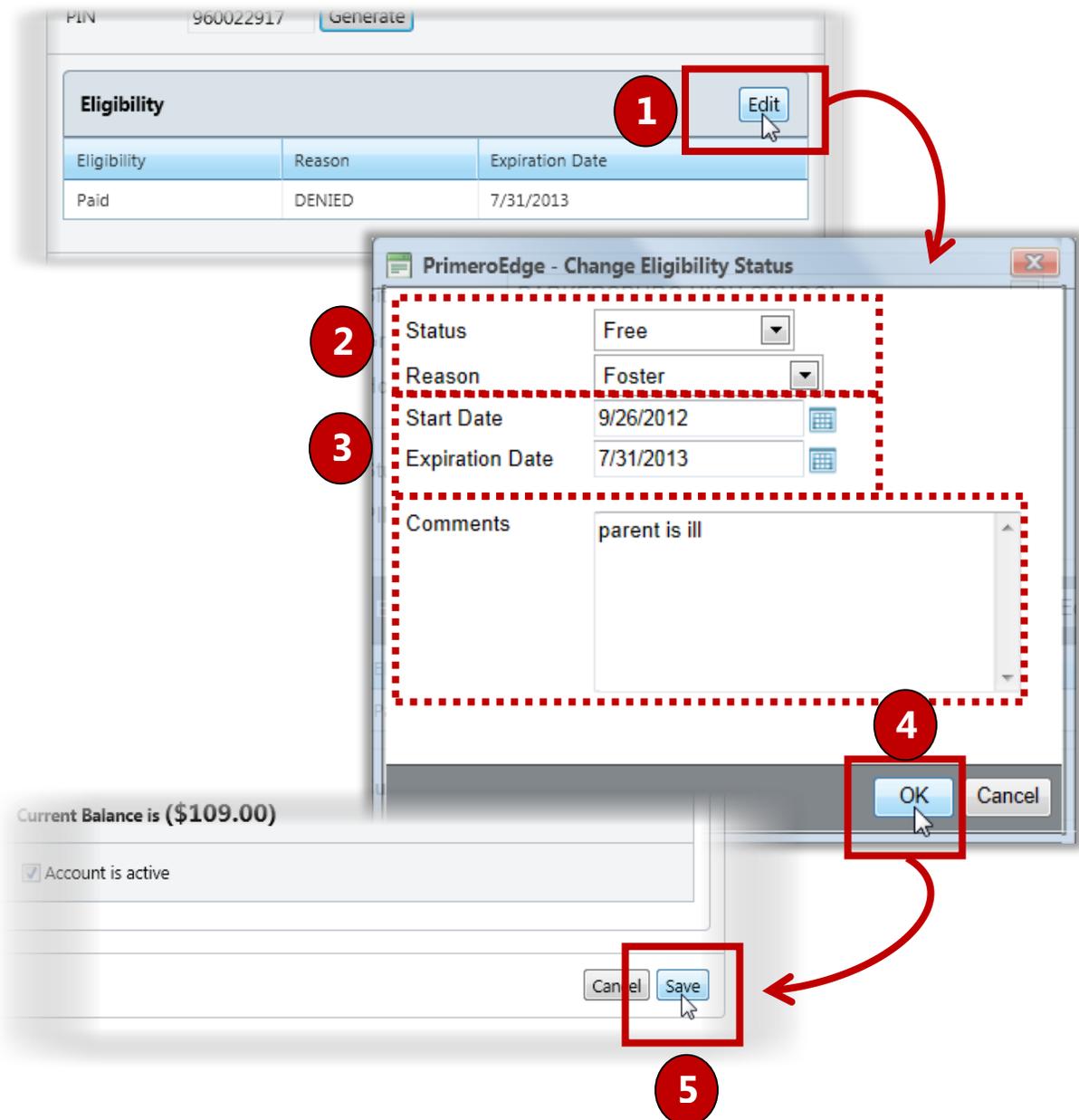
Current Balance is (\$109.00)

Account is active

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.

Student Details: TRAVIS - 2917

[Back to Students](#)

Particulars Demographics Household Eligibility Picture and Notes Restrictions Enrollment History

Ethnicity: Other
 Race: White
 Gender: Male
 Language: English
 Birth Date: 9/18/1995

Guardian Information

First Name: KATHY
 Last Name:
 Middle Name:
 SSN:
 Home Phone: 4512
 Work Phone: 9557

Cancel Save

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.

Student Details: TRAVIS - 2917

[Back to Students](#)

Particulars Demographics Household Eligibility Picture and Notes Restrictions Enrollment History

Students in Household

Last Name	First Name	ID	School	Grade	Household Pin
	TRAVIS	2917	HIGH SCHOOL	10	1276

Cancel Save

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”.

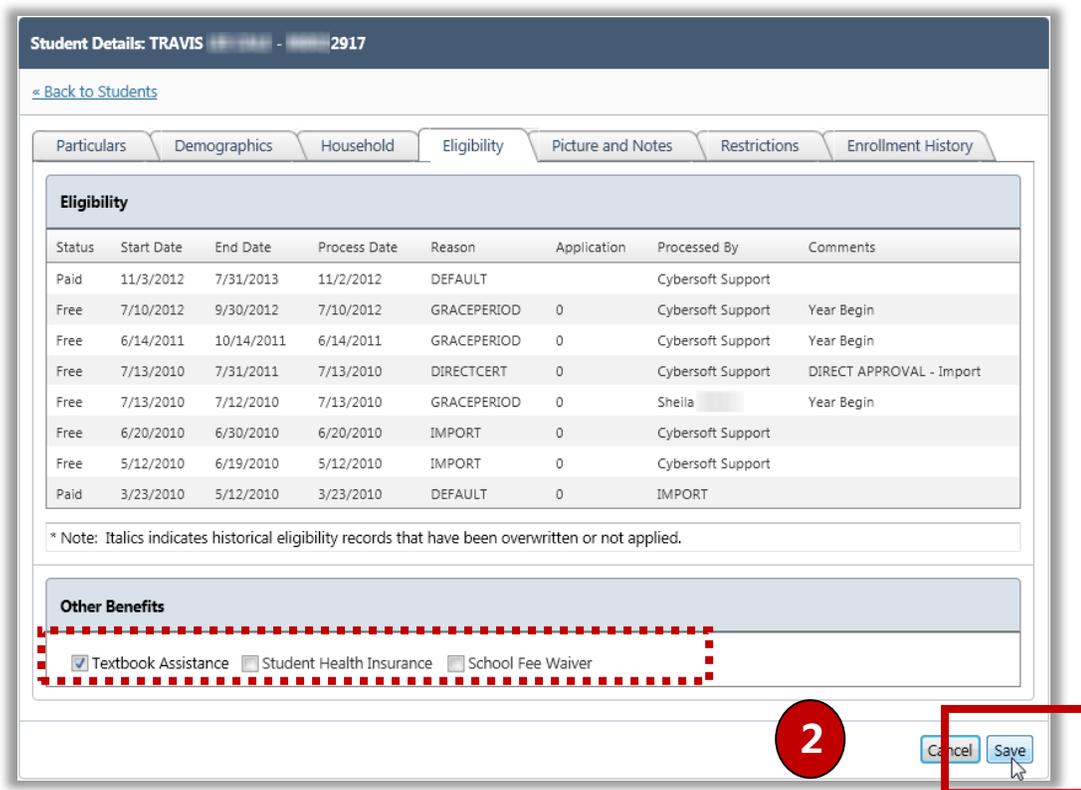
When Eligibility is changed through the **Particulars** tab, the application number is changed to “0” (zero). The application number (other than “0” [zero]) is a link that displays the application in the *View Application* popup.

 **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: TRAVIS - 2917

[Back to Students](#)

Particulars Demographics Household Eligibility Picture and Notes Restrictions Enrollment History

Eligibility

Status	Start Date	End Date	Process Date	Reason	Application	Processed By	Comments
Paid	11/3/2012	7/31/2013	11/2/2012	DEFAULT		Cybersoft Support	
Free	7/10/2012	9/30/2012	7/10/2012	GRACEPERIOD	0	Cybersoft Support	Year Begin
Free	6/14/2011	10/14/2011	6/14/2011	GRACEPERIOD	0	Cybersoft Support	Year Begin
Free	7/13/2010	7/31/2011	7/13/2010	DIRECTCERT	0	Cybersoft Support	DIRECT APPROVAL - Import
Free	7/13/2010	7/12/2010	7/13/2010	GRACEPERIOD	0	Sheila	Year Begin
Free	6/20/2010	6/30/2010	6/20/2010	IMPORT	0	Cybersoft Support	
Free	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

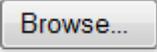
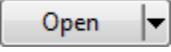
Textbook Assistance Student Health Insurance School Fee Waiver

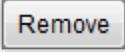
Tab 5 – Picture and Notes

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 – Restrictions

The **Restrictions** tab details POS Restrictions. Special Instructions display information on the POS terminal for the cashiers.

The account can be flagged to not accept checks and to not accept charges.

Student Details: TRAVIS - 2917

[Back to Students](#)

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

A La Carte Restrictions

Item Restrictions

	Mon	Tue	Wed	Thu	Fri
Do not allow this student to use CASH for a la carte purchases on these selected days.	<input type="checkbox"/>				
Do not allow this student to DEBIT their account for a la carte purchases on these selected days.	<input type="checkbox"/>				

Maximum number of a la carte items allowed per day.

Restriction Amount

	Enabled	Amount
Daily	<input type="checkbox"/>	\$ <input type="text"/>
Weekly	<input type="checkbox"/>	\$ <input type="text"/>
Monthly	<input type="checkbox"/>	\$ <input type="text"/>

Special Instructions (Max 84 char)

Restrict Menu Items

No records to display.

Other Restrictions

- Do not accept checks on this account
- No charges allowed

Setting a La Carte Restrictions

On the **Restrictions** tab of the *Student Details* page:

- 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.
- Select a restriction time range option and enter the maximum amount the student can spend on A La Carte items.

A La Carte Restrictions

Item Restrictions

	Mon	Tue	Wed	Thu	Fri
Do not allow this student to use CASH for a la carte purchases on these selected days.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Do not allow this student to DEBIT their account for a la carte purchases on these selected days.	<input checked="" type="checkbox"/>				

Maximum number of a la carte items allowed per day:

Restriction Amount

	Enabled	Amount
Daily	<input checked="" type="checkbox"/>	\$ <input type="text"/>
Weekly	<input type="checkbox"/>	\$ 5.00
Monthly	<input type="checkbox"/>	\$ <input type="text"/>

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 (Max 84 char)

Peanut allergies

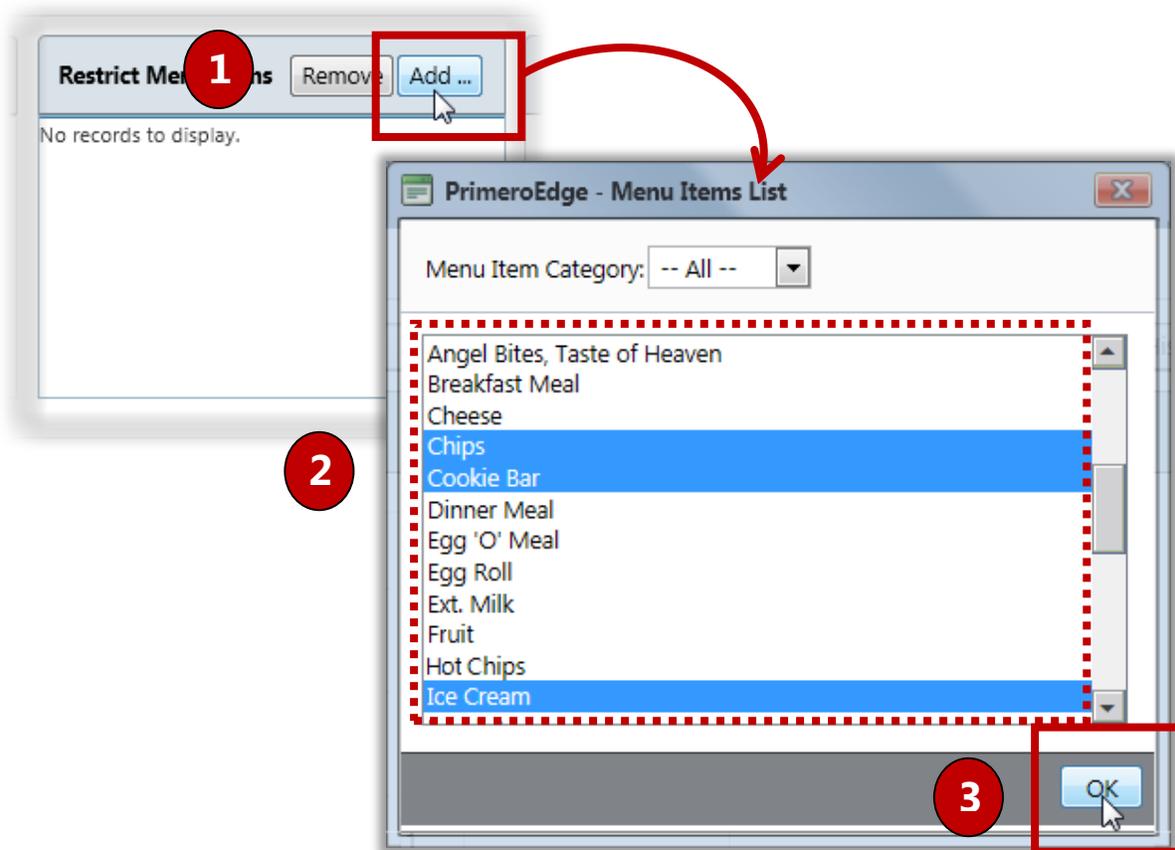
Setting Menu Item Restrictions

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 .

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.

Other Restrictions

Do not accept checks on this account

No charges allowed

Reason

Payment Due

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: TRAVIS - 2917

[Back to Students](#)

Particulars Demographics Household Eligibility Picture and Notes Restrictions Enrollment History

Enrollment History

School	Grade	Start Date	End Date	Activity Date
BLANNERHASSETT MIDDLE SCHOOL	07	03/23/2010	N/A	03/23/2010
PARKERSBURG HIGH SCHOOL	10	08/02/2012	N/A	08/02/2012

Cancel Save

5

Application Reports

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

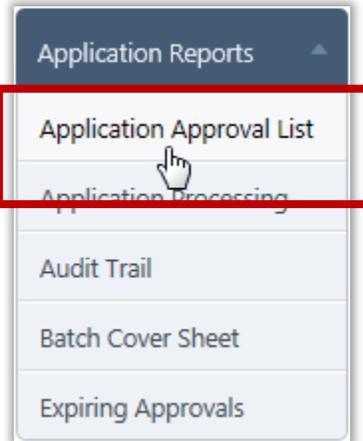
- ✓ Application Approval List
- ✓ Application Processing
- ✓ Audit Trail
- ✓ Batch Cover Sheet
- ✓ Expiring Approvals

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.

Application Approval List Page

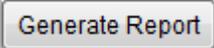
 A screenshot of the 'Application Approval List' page. It features several input fields and filters:

- Site Code** and **Site**: Two dropdown menus.
- Date Range**: Three radio button options:
 - Daily** (selected): From: 5/17/2013 (with a calendar icon).
 - Monthly**: Month: May (dropdown), Year: 2013 (dropdown).
 - Date Range**: From: 5/1/2013 (with a calendar icon), To: 5/17/2013 (with a calendar icon).
- Eligibility**: A dropdown menu set to '-- ALL --'.
- User**: A text input field with a search icon (three dots in a square).
- Generate Report**: A button in the bottom right corner.

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

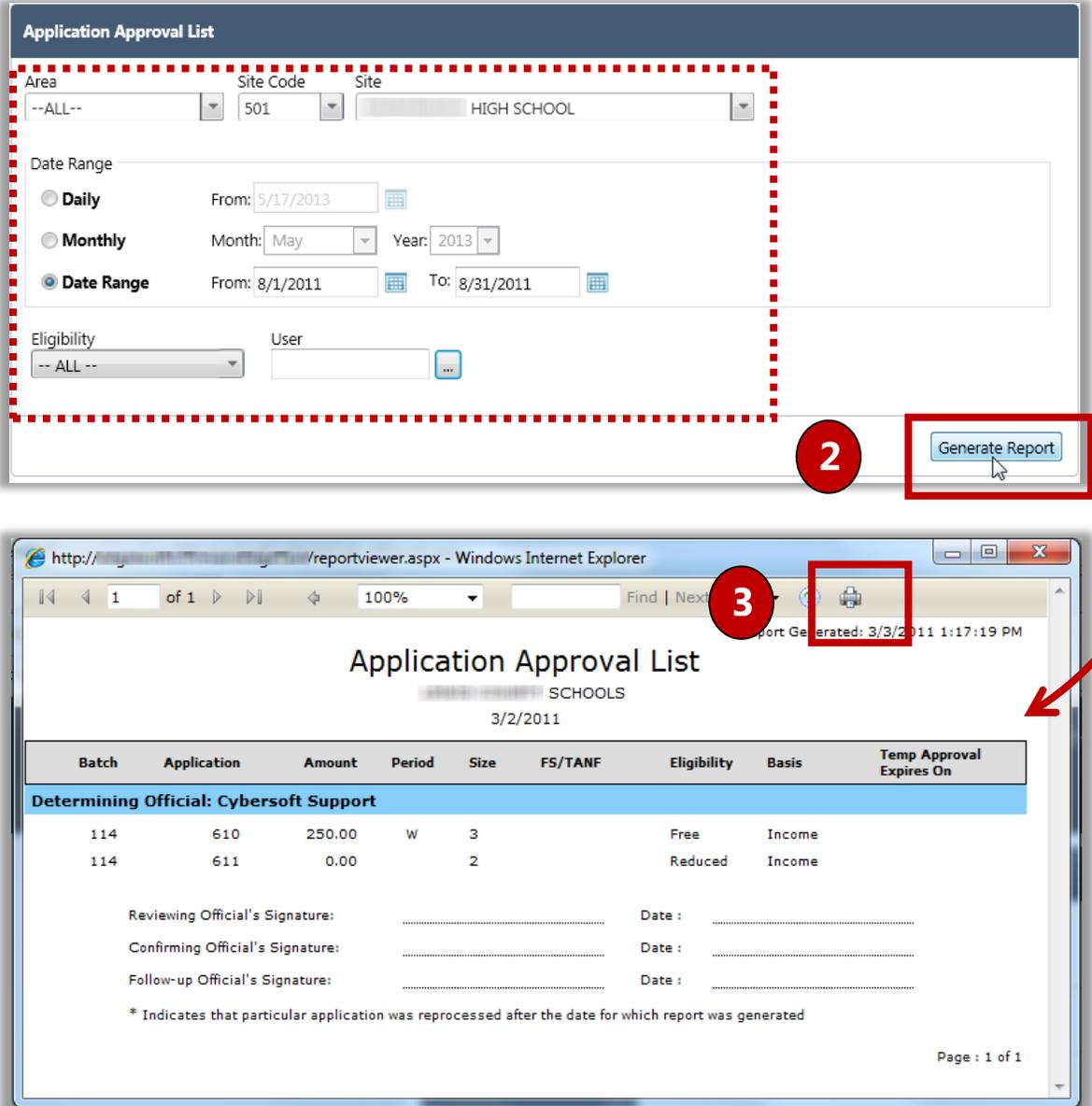
- **Site Code / Site** are set to your site, or set to “ALL” if you have access to multiple sites.
- **Date Range** is set to the current date.
- **Eligibility** is set to “ALL”.
- **User** is blank.

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



The screenshot illustrates the process of generating and printing an Application Approval List. It is divided into two parts:

Top Screenshot (Step 1-2): Shows the 'Application Approval List' form. A red dashed box labeled '1' highlights the filter selection area, including '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.

Bottom Screenshot (Step 3): Shows the resulting report in a browser window. A red box labeled '3' highlights the 'Print' icon in the browser toolbar. The report content includes:

Application Approval List
SCHOOLS
3/2/2011
Report Generated: 3/3/2011 1:17:19 PM

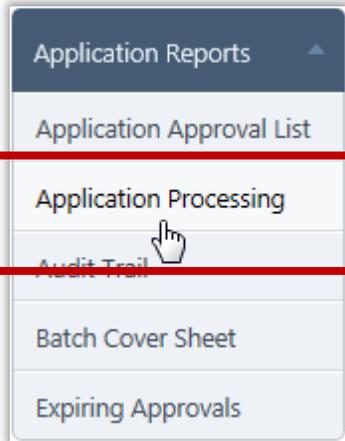
Batch	Application	Amount	Period	Size	FS/TANF	Eligibility	Basis	Temp Approval Expires On
Determining Official: Cybersoft Support								
114	610	250.00	W	3		Free	Income	
114	611	0.00		2		Reduced	Income	

Reviewing Official's Signature: Date :
Confirming Official's Signature: Date :
Follow-up Official's Signature: Date :

* Indicates that particular application was reprocessed after the date for which report was generated

Page : 1 of 1

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.

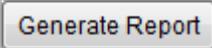
Application Processing Page

 A screenshot of the 'Application Processing' page. It features a dark blue header with the title 'Application Processing'. Below the header is a white box labeled 'Report' containing two radio button options: 'Application Cycle Timeline' (which is selected) and 'Application Processing'. A 'Generate Report' button is located in the bottom right corner of the page.

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

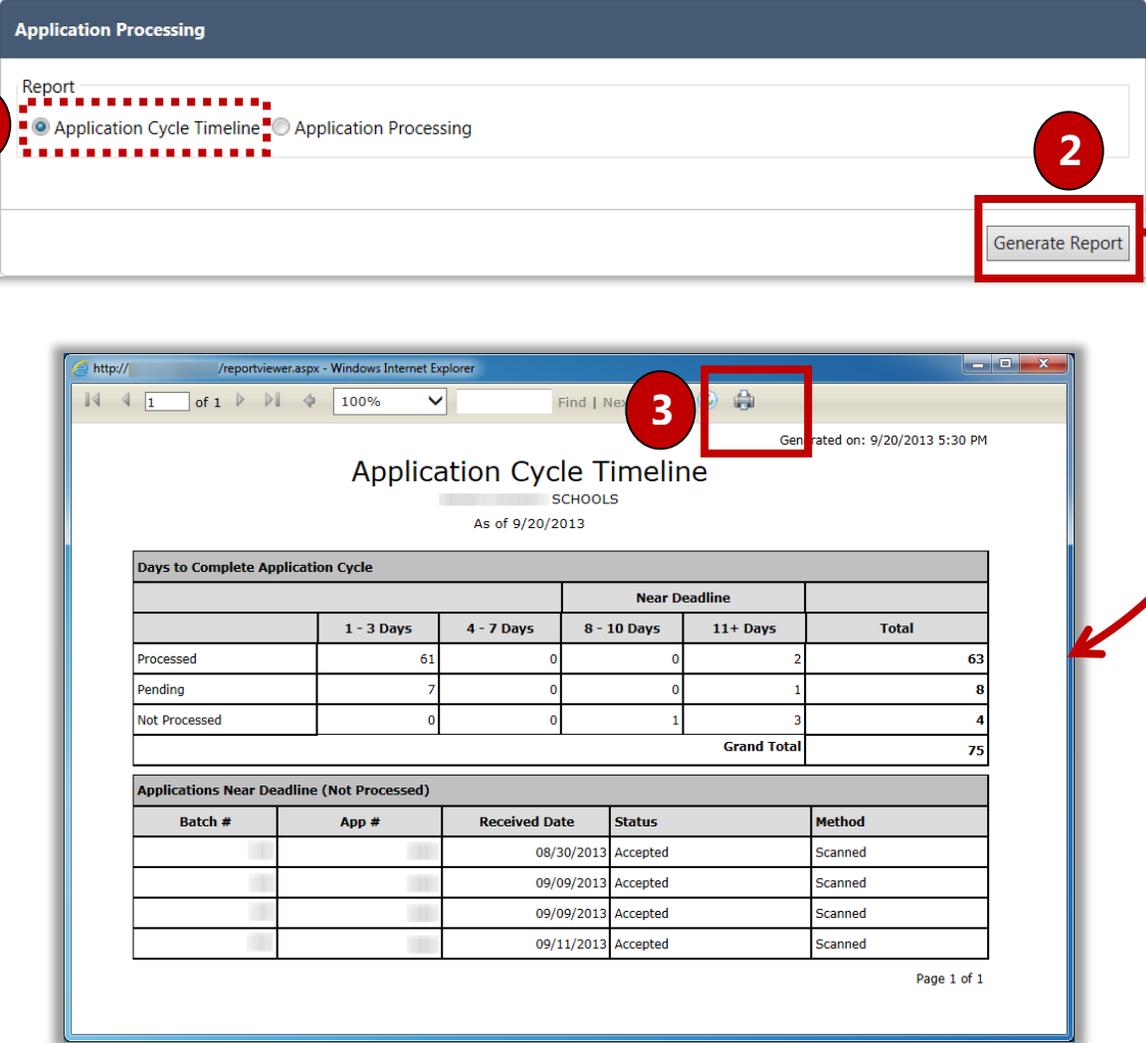
- **Application Cycle Timeline** is selected.

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.



The screenshot shows the 'Application Processing' report generation interface. A red dashed box labeled '1' highlights the 'Application Cycle Timeline' radio button. A red box labeled '2' highlights the 'Generate Report' button. A red box labeled '3' highlights the print icon in the browser toolbar. A red arrow points from the 'Generate Report' button to the resulting report page.

The resulting report page is titled 'Application Cycle Timeline' and 'SCHOOLS'. It is generated on 9/20/2013 5:30 PM. The report contains two tables:

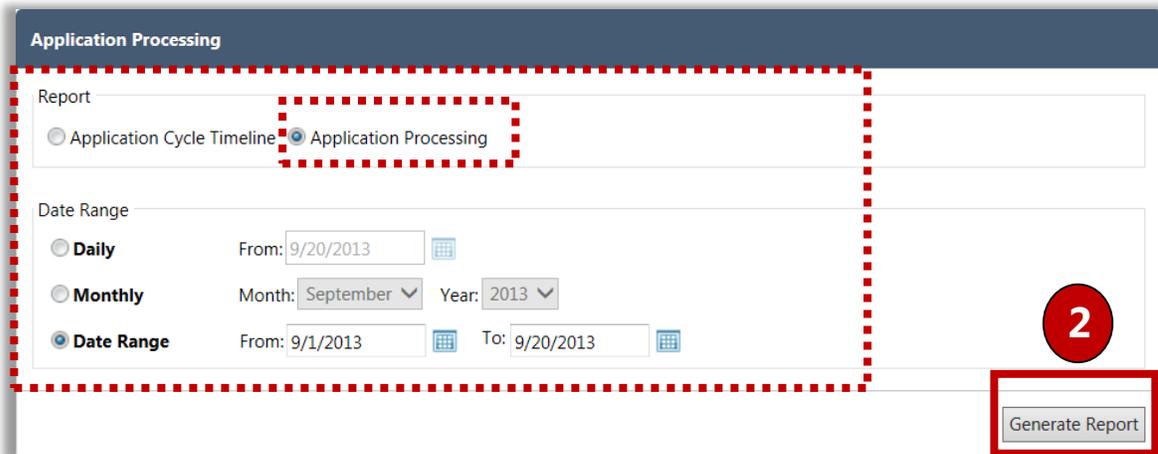
Days to Complete Application Cycle					
	Near Deadline				Total
	1 - 3 Days	4 - 7 Days	8 - 10 Days	11+ Days	
Processed	61	0	0	2	63
Pending	7	0	0	1	8
Not Processed	0	0	1	3	4
Grand Total					75

Applications Near Deadline (Not Processed)				
Batch #	App #	Received Date	Status	Method
		08/30/2013	Accepted	Scanned
		09/09/2013	Accepted	Scanned
		09/09/2013	Accepted	Scanned
		09/11/2013	Accepted	Scanned

Page 1 of 1

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

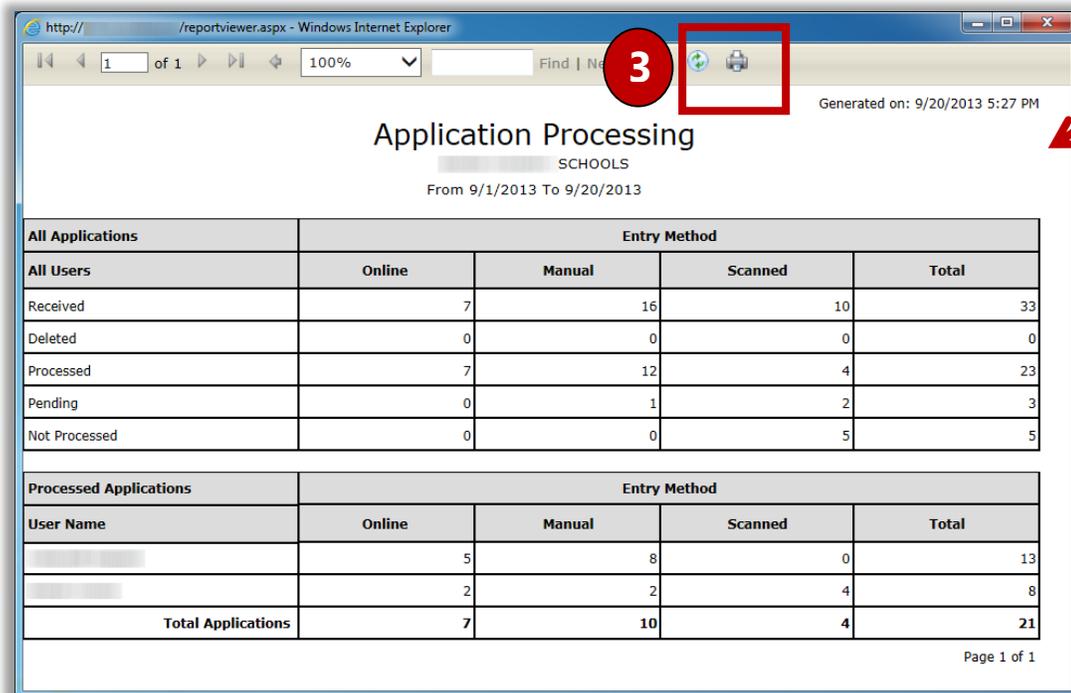
Date Range

Daily From: 9/20/2013

Monthly Month: September Year: 2013

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

Generate Report



http:// /reportviewer.aspx - Windows Internet Explorer

Generated on: 9/20/2013 5:27 PM

Application Processing

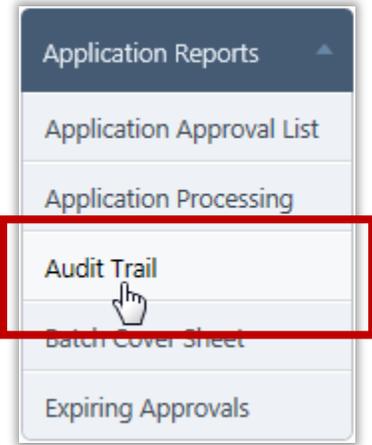
SCHOOLS

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.

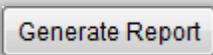
Audit Trail Page

A screenshot of the 'Audit Trail' page. It features a header 'Audit Trail' and three input fields: 'Site Code' (a dropdown menu), 'Site' (a dropdown menu with 'ELEMENTARY SCHOOL' selected), and 'Date' (a text field with '3/1/2011' and a calendar icon). A 'Generate Report' button is located in the bottom right corner.

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

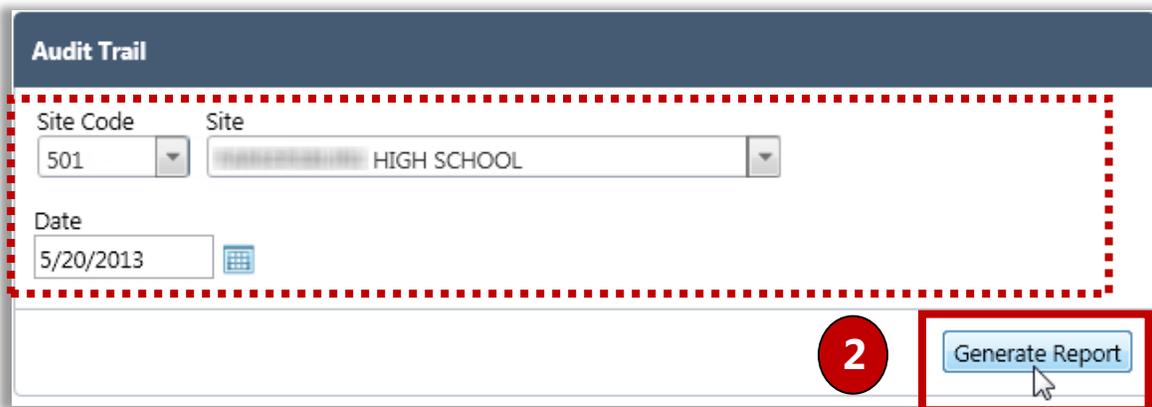
- **Site Code** / **Site** are set to your site, or set to “ALL” if you have access to multiple sites.
- **Date** is set to the current date.

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.



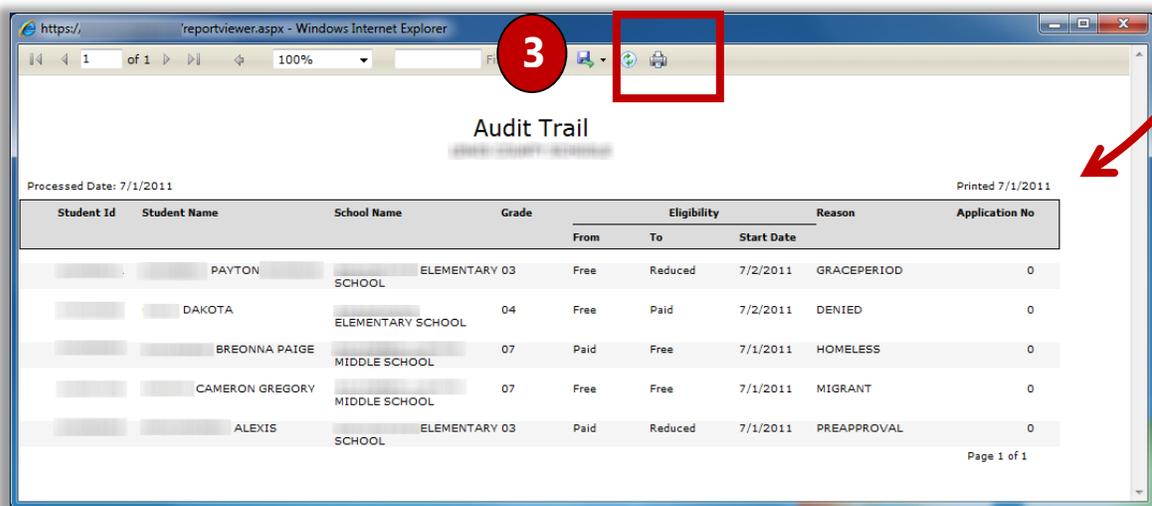
1

Audit Trail

Site Code: 501 Site: HIGH SCHOOL

Date: 5/20/2013

2 Generate Report



3

https://reportviewer.aspx - Windows Internet Explorer

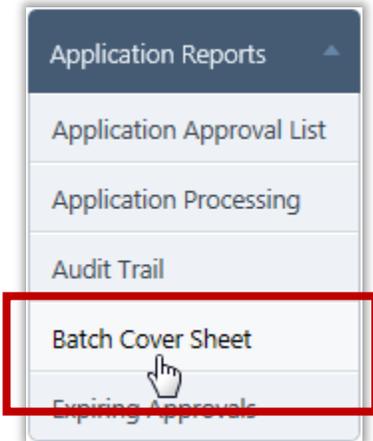
Audit Trail

Processed Date: 7/1/2011 Printed 7/1/2011

Student Id	Student Name	School Name	Grade	Eligibility		Reason	Application No
				From	To		
	PAYTON	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.

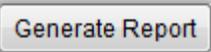
Batch Cover Sheet Page

A screenshot of the 'Batch Cover Sheet' page. It features a dark blue header with the title 'Batch Cover Sheet'. Below the header are two dropdown menus: 'Academic Year' with the value '2012 - 2013' and 'Batch #' with the value '399'. A 'Generate Report' button is located in the bottom right corner of the form area.

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

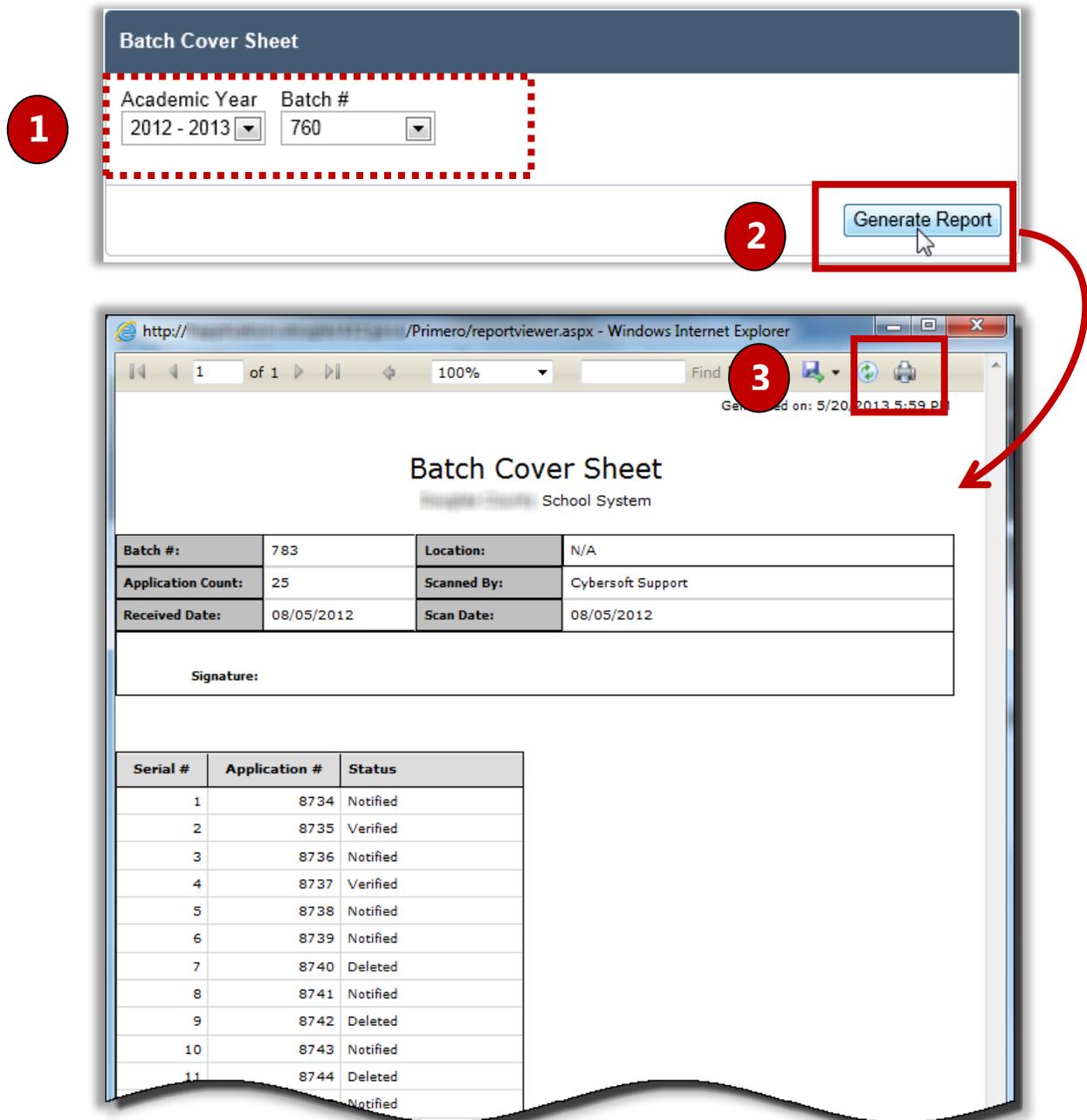
- **Academic Year** is set to the current school year.
- **Batch #** is set to the last-created batch number.

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

Batch Cover Sheet
School System

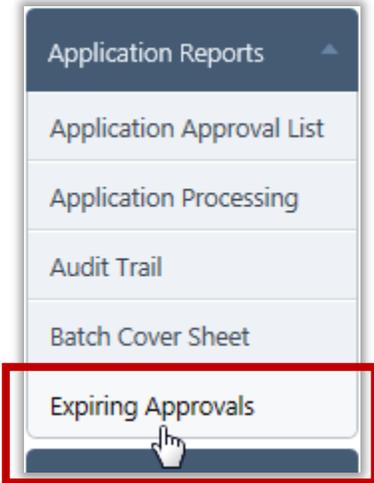
Batch #:	783	Location:	N/A
Application Count:	25	Scanned By:	Cybersoft Support
Received Date:	08/05/2012	Scan Date:	08/05/2012

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
		Notified

Expiring Approvals

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



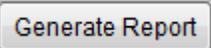
Expiring Approvals Page

A screenshot of the 'Expiring Approvals' page. At the top is a dark blue header with the text 'Expiring Approvals'. Below the header are two dropdown menus: 'Site Code' and 'Site'. Underneath these is a section titled 'Expiring Approvals' containing a radio button labeled 'Grace Period' which is selected. In the bottom right corner of the page is a blue button labeled 'Generate Report'.

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”.

Page Functions

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

<<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 Needy
- ✓ 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.
Elibility 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 Needy	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.

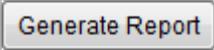
Benefits Issuance Page

 A screenshot of the 'Benefits Issuance' page. It features a header 'Benefits Issuance' and several input fields: 'Site Code' (dropdown menu with '-- ALL --'), 'Site' (dropdown menu with '-- ALL --'), 'Date Range' (radio buttons for 'Daily', 'Monthly', and 'Date Range'). The 'Daily' option is selected. The 'Date Range' section includes 'From' and 'To' date pickers, both set to 7/1/2011. The 'Monthly' section includes 'Month' (dropdown menu with 'July') and 'Year' (dropdown menu with '2011'). A 'Generate Report' button is located at the bottom right of the form.

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.

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.

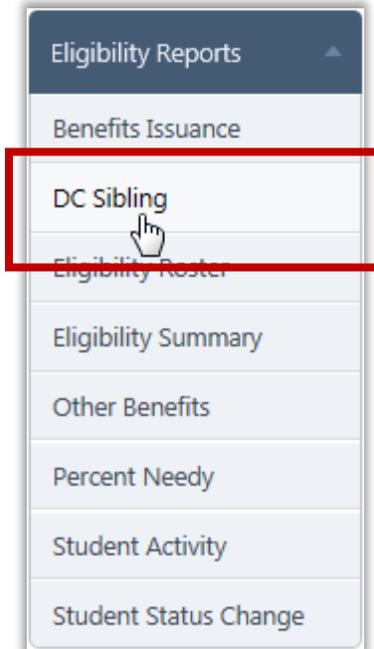
1

2

3

Student ID	Student Name	Grade	Eligibility	Effective Date	End Date	Reason
Site: 0198 ELEMENTARY-622						
634	Mikayla	4	Free	8/21/2012	07/31/2013	INCOME
				8/2/2012		Returned to district
045	Mikial	5	Free	8/21/2012	07/31/2013	INCOME
				8/2/2012		Returned to district
291	Haidyn	4	Free	8/3/2012	07/31/2013	INCOME
				8/2/2012		Returned to district
032	Keegan	5	Free	8/3/2012	07/31/2013	INCOME
				8/15/2012		Returned to district
737	Logahn	2	Free	8/3/2012	07/31/2013	INCOME
				8/2/2012		Returned to district
267	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.

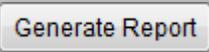
DC Sibling Page

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

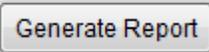
By default on the **DC Sibling** page:

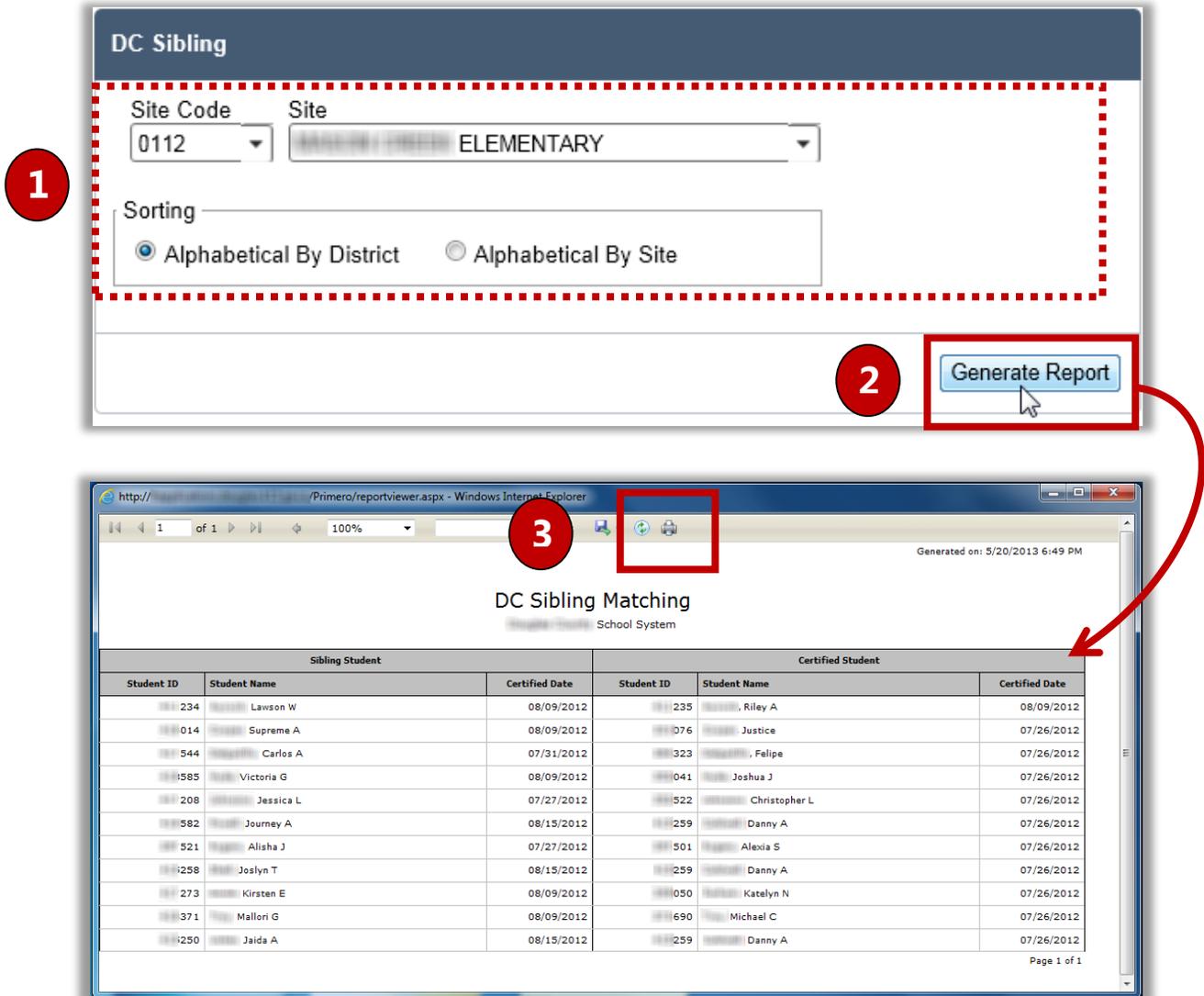
- **Site / Site Code** are set to your site, or set to "ALL" if you have access to multiple sites.
- **Sorting** is set to "Alphabetical By District".

Page Functions

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

To generate and print a DC Sibling report:

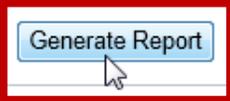
1. Select a site in **Site Code** or **Site**, and select a sorting option.
2. Click  .
3. Click **Print** () on the window toolbar.



1

Site Code: 0112 | Site: ELEMENTARY

Sorting: Alphabetical By District Alphabetical By Site

2 

3 

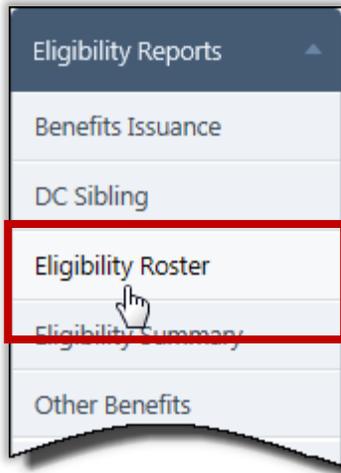
Generated on: 5/20/2013 6:49 PM

DC Sibling Matching
School System

Sibling Student			Certified Student		
Student ID	Student Name	Certified Date	Student ID	Student Name	Certified Date
234	Lawson W	08/09/2012	235	Riley A	08/09/2012
014	Supreme A	08/09/2012	076	Justice	07/26/2012
544	Carlos A	07/31/2012	323	Felipe	07/26/2012
585	Victoria G	08/09/2012	041	Joshua J	07/26/2012
208	Jessica L	07/27/2012	522	Christopher L	07/26/2012
582	Journey A	08/15/2012	259	Danny A	07/26/2012
521	Alisha J	07/27/2012	501	Alexia S	07/26/2012
258	Joslyn T	08/15/2012	259	Danny A	07/26/2012
273	Kirsten E	08/09/2012	050	Katelyn N	07/26/2012
371	Mallori G	08/09/2012	690	Michael C	07/26/2012
250	Jaida A	08/15/2012	259	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' web application 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 a calendar icon, showing '9/23/2013'. The page is divided into several sections:

- Eligibility:** Three checked checkboxes: 'Free', 'Reduced', and 'Paid'.
- Display:** Four unchecked checkboxes: 'Show Eligibility Code Only', 'Show Application Information', 'Contact Info', and 'Sort by Grade'.
- Include:** Three unchecked checkboxes: 'Inactive Students', 'Inactive Sites', and 'Only Verification Sites'.
- Reason:** A section titled 'Uncheck All' with a checked checkbox, followed by a grid of 18 checked checkboxes: 'Categorical', 'DC Foster', 'DC SNAP', 'Default', 'Denied', 'Direct Cert', 'Even Start', 'Foster', 'Grace Period', 'Head Start', 'Homeless', 'Import', 'Income', 'Migrant', 'Pre-Approval', 'Principal Approved', 'RCCI', 'Refused Benefits', 'Removed', 'Runaway', 'Transfer', and 'Verification'.

 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 an Eligibility 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 Roster

Area: --ALL-- | Site Code: | Site: | Grade: ALL

As of Date: 9/23/2013

Eligibility

- Free
- Reduced
- Paid

Reason

- Uncheck All
- Categorical
- DC Foster
- Default
- Denied
- Direct Cert
- Even Start
- Foster
- Grace Period
- Head Start
- Homeless
- Import
- Income
- Migrant
- Pre-Approval
- Principal Approved
- RCCI
- Refused Benefits
- Removed
- Runaway
- Transfer
- Verification

Display

- Show Eligibility Code Only
- Show Application Information
- Contact Info
- Sort by Grade

Include

- Inactive Students
- Inactive Sites
- Only Verification Sites

Generate Report

Section 6: Eligibility Reports

http://.../reportviewer.aspx - Windows Internet Explorer

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3

Eligibility Roster

SCHOOLS

As of 9/22/2013

Generated on: 9/23/2013 8:56 AM

ID	Name	Grade	Eligibility	Reason	Start Date	End Date	Phone Number	Email
Site: [REDACTED] ELEMENTARY SCHOOL								
[REDACTED]	[REDACTED], SAMUEL EDWARD	2	Free	GRACEPERIOD	7/1/2013	9/30/2013	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], HALEY MARQUETTE	5	Free	GRACEPERIOD	7/1/2013	9/30/2013	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], JARRETT MARK	3	Free	GRACEPERIOD	7/1/2013	9/30/2013	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], MICHAEL PHILLIP	2	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], PETER DOUGLAS	3	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], ADDISON GRACE	2	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], ISAIAH DEMETRIUS	1	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], BRAYDEN GARRETT	PK	Reduced	GRACEPERIOD	7/1/2013	9/30/2013	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], KATHERINE ELIZABETH	5	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], HUNTER RAE	4	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], JOSHUA STEVEN	KG	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], MACKENZIE SHEA	4	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], ZACHERY ALLEN	4	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], HUNTER RAE	4	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], JUSTIN MICHAEL	2	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], ALEX SCOTT	5	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED], EVAN JAMES	1	Paid	DEFAULT	7/1/2013	7/31/2014	[REDACTED]	[REDACTED]
Site Total: 457								
Grand Total: 13,189								

Page: 32 of 33

Site Total and Grand Total

http://.../reportviewer.aspx - Windows Internet Explorer

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Eligibility Roster

SCHOOLS

As of 9/22/2013

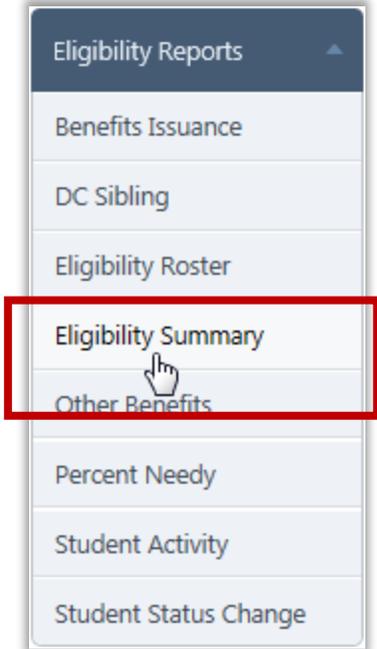
Generated on: 9/23/2013 9:36 AM

Eligibility	Count	Reason	Count
Free	573	Categorical	6
Reduced	23	DC Foster	6
Paid	12,593	DC SNAP	5
Total:	13,189	Default	12,590
		Denied	1
		Direct Cert	19
		Even Start	0
		Foster	4
		Grace Period	503
		Head Start	0
		Homeless	0
		Import	0
		Income	39
		Migrant	0
		Pre-Approval	0
		Principal Approved	0
		RCCI	0
		Refused Benefits	1
		Removed	0
		Runaway	0
		Transfer	0
		Verification	16
		Total:	13,190

Page: 33 of 33

Last Page

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 needy, the number of students who are DC and the number of students that were denied.

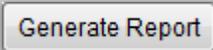
Eligibility Summary Page

A screenshot of the 'Eligibility Summary' page. It features a header 'Eligibility Summary' and several input fields: 'Site Code' (dropdown), 'Site' (dropdown), 'As of Date' (text field with calendar icon, set to 5/21/2013), and 'Report Type' (radio buttons for 'Summary' and 'Detailed', with 'Summary' selected). A 'Generate Report' button is located at the bottom right.

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”.

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**, and select new **Date** and **Report Type** options, as needed.
2. Click **Generate Report**.
3. Click **Print** () on the window toolbar.

1

Site Code: --ALL-- Site: --ALL-- As of Date: 5/21/2013

Report Type: Summary Detailed

2 Generate Report

3

Student Eligibility
School System
As of: 5/21/2013

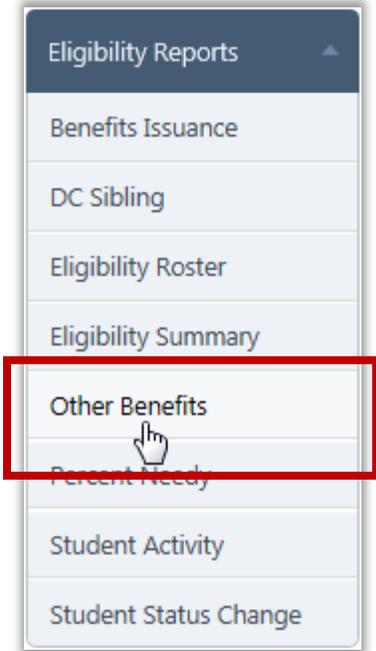
Site	Free							Reduced			Paid			Total	% Eco Dis				
	DC	Income	Categorical	Temp	Foster	Other	Total	% DC	Income	Other	Total	No App	Denied		Total	% Free	% Red	% Paid	
Douglas County School System																			
HIGH	222	159	20	0	5	0	406	54.68	82	0	82	632	20	652	1,140	35.61	7.19	57.19	42.81
MIDDLE	208	105	22	0	0	2	337	61.72	61	0	61	158	14	172	570	59.12	10.70	30.18	69.82
ELEMENTARY	314	113	45	0	1	3	476	65.97	42	4	46	111	14	125	647	73.57	7.11	19.32	80.68
ELEMENTARY	235	96	26	0	1	0	358	65.64	63	0	63	216	15	231	652	54.91	9.66	35.43	64.57
MIDDLE	290	150	47	0	6	4	497	58.35	92	4	96	203	27	230	823	60.39	11.66	27.95	72.05
ELEMENTARY	154	63	8	0	5	1	231	66.67	40	1	41	278	16	294	566	40.81	7.24	51.94	48.06
MIDDLE	249	112	16	0	2	3	382	65.18	59	2	61	350	22	372	815	46.87	7.48	45.64	54.36
HIGH	489	338	57	0	7	2	893	54.76	97	1	98	381	28	409	1,400	63.79	7.00	29.21	70.79
ELEMENTARY	156	69	25	0	3	3	256	60.94	51	1	52	228	11	239	547	46.80	9.51	43.69	56.31
MIDDLE	85	35	11	0	0	0	131	64.89	24	1	25	387	14	401	557	23.52	4.49	71.99	28.01
ELEMENTARY	176	51	18	0	2	2	249	70.68	40	0	40	142	7	149	438	56.85	9.13	34.02	65.98
HIGH	378	164	17	0	6	4	569	66.43	114	0	114	980	24	1,004	1,687	33.73	6.76	59.51	40.49
MIDDLE	323	159	42	0	2	3	529	61.06	65	1	66	127	9	136	731	72.37	9.03	18.60	81.40
ELEMENTARY	87	27	13	0	3	0	130	66.92	14	1	15	431	8	439	584	22.26	2.57	75.17	24.83
ELEMENTARY	161	99	20	0	1	4	285	56.49	41	2	43	99	10	109	437	65.22	9.84	24.94	75.06
ELEMENTARY	167	67	18	0	1	0	192	65.63	33	0	33	100	10	143	547	35.10	5.85	59.05	40.95

District & Site Totals

HIGH	578	293	85	0	13	7	974	60.14	153	1	153	687	48	735	1,218	58.04	8.04	33.92	66.08
ELEMENTARY	178	86	28	0	3	1	296	60.14	39	2	41	158	15	173	510	58.04	8.04	33.92	66.08
MIDDLE	276	123	28	0	0	5	432	63.89	55	0	55	44	12	56	543	79.56	10.13	10.31	89.69
ELEMENTARY	163	112	46	0	2	2	325	50.15	26	1	27	42	10	52	404	80.45	6.68	12.87	87.13
Total:	8,258	4,092	1,049	0	149	73	13,621	60.63	1,968	36	2,004	9,040	613	9,653	25,278	53.88	7.93	38.19	61.81

Eco Dis: Economically Disadvantaged Page: 1 of 2

Other Benefits

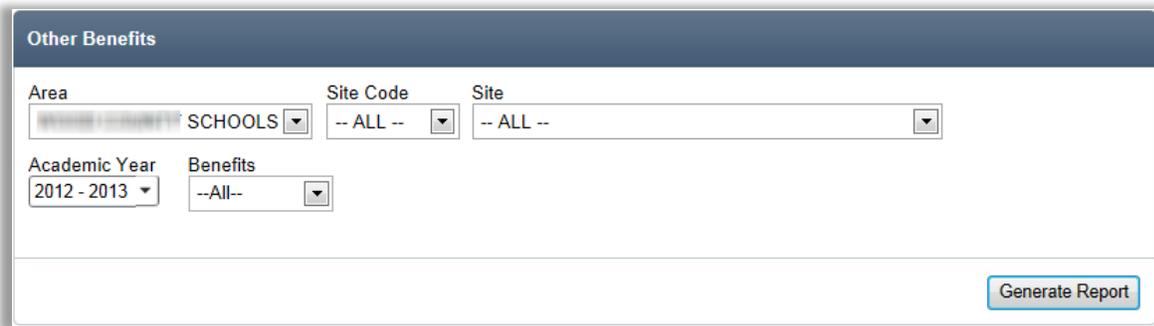


Other Benefits lists all students who requested more information regarding benefits offered by their district.

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.

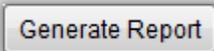
Other Benefits Page



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

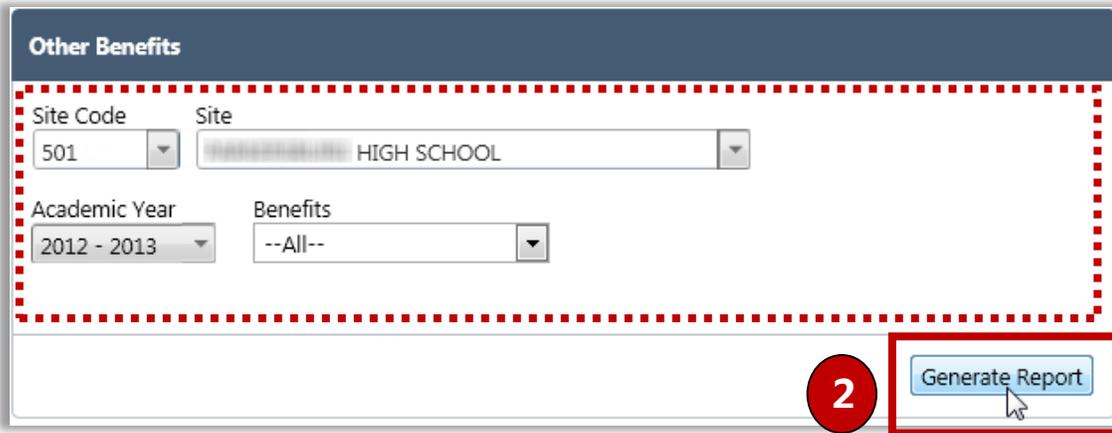
- **Site / Site Code** are set to your site, or set to “**ALL**” if you have access to multiple sites.
- **Academic Year** is set to the current date.
- **Benefits** is set to “All”.

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 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.

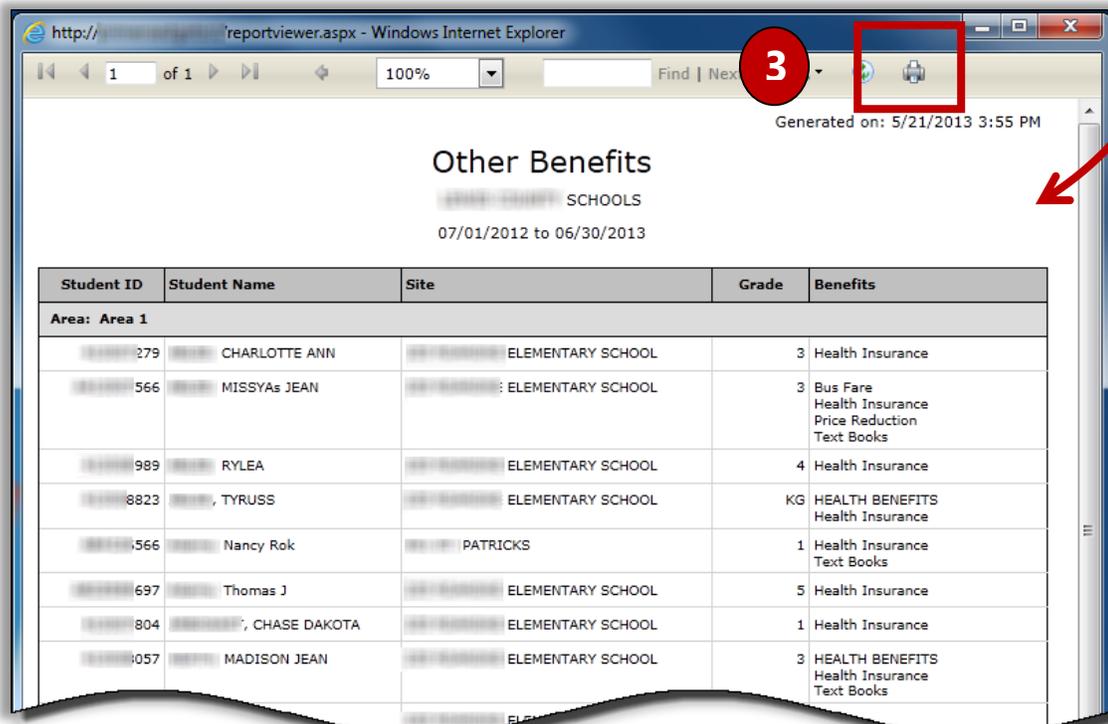


Other Benefits

Site Code: 501 Site: HIGH SCHOOL

Academic Year: 2012 - 2013 Benefits: --All--

2 Generate Report



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Generated on: 5/21/2013 3:55 PM

Other Benefits

SCHOOLS

07/01/2012 to 06/30/2013

Student ID	Student Name	Site	Grade	Benefits
Area: Area 1				
279	CHARLOTTE ANN	ELEMENTARY SCHOOL	3	Health Insurance
566	MISSYAs JEAN	ELEMENTARY SCHOOL	3	Bus Fare Health Insurance Price Reduction Text Books
989	RYLEA	ELEMENTARY SCHOOL	4	Health Insurance
8823	TYRUSS	ELEMENTARY SCHOOL	KG	HEALTH BENEFITS Health Insurance
566	Nancy Rok	PATRICKS	1	Health Insurance Text Books
697	Thomas J	ELEMENTARY SCHOOL	5	Health Insurance
804	CHASE DAKOTA	ELEMENTARY SCHOOL	1	Health Insurance
057	MADISON JEAN	ELEMENTARY SCHOOL	3	HEALTH BENEFITS Health Insurance Text Books

3

Percent Needy



Percent Needy 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.

Percent Needy Page



By default on the **Batch Sheet** 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

Page Functions

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

To generate and print a Percent Needy report:

On the **Percent Needy** 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.

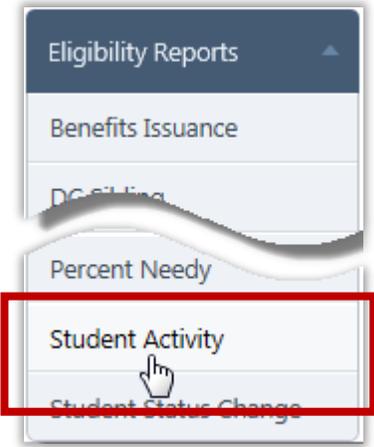
Percent Needy
As of 5/21/2013

Site	Enrollment	Free	Reduced	% Needy
SFA: Douglas County School System				
... HIGH	1,140	406	82	42.81
... MIDDLE	570	337	61	69.82
... ELEMENTARY	647	476	46	80.68
... ELEMENTARY	652	358	63	64.57
... MIDDLE	823	497	96	72.05
... ELEMENTARY	566	231	41	48.06
... MIDDLE	815	382	61	54.36
... HIGH	1,400	893	98	70.79
... ELEMENTARY			52	56.31
... ELEMENTARY	510	296		
... MIDDLE	543	432	55	89.69
... ELEMENTARY	404	325	27	87.13
Total	25,278	13,621	2,004	61.81
Grand Total	25,278	13,621	2,004	61.81

District & Site Totals

Page: 1 of 1

Student Activity



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

Student Activity Page

Student Activity

Site Code Site

Date Range

Daily From:

Monthly Month: Year:

Date Range From: To:

Student Activity Reports

New Students
 Student Transfer
 Student Withdrawal

Current Eligibility

Free Reduced Paid

Current Reason

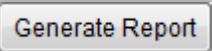
Uncheck All

Categorical Grace Period Principal Approved
 DC Foster Head Start RCCI
 DC SNAP Homeless Refused Benefits
 Default Import Removed
 Denied Income Runaway
 Direct Cert Migrant Transfer
 Even Start Pre-Approval Verification
 Foster

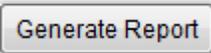
By default on the **Student Activity** page:

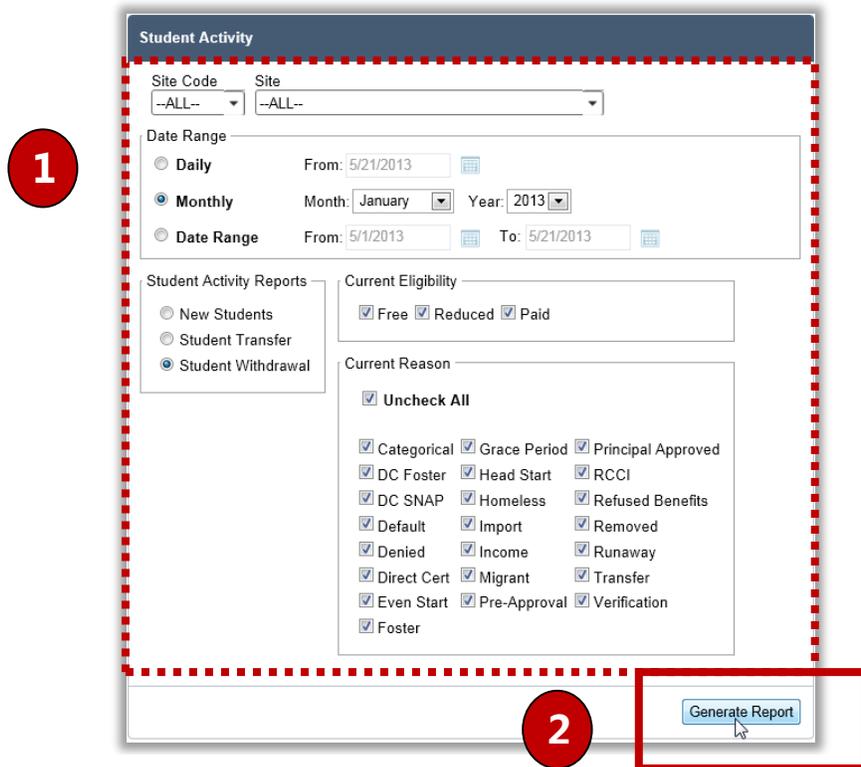
- **Site / Site Code** are set to your site, or set to “**ALL**” if you have access to multiple sites.
- **Date Range** is set to “**Daily**” with the current date selected.
- Student Activity Reports is set to “New Students”
- **Current Eligibility** has all options enabled (checkmark added).
- **Current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

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.



Student Withdrawal
School System
1/1/2013 To 1/31/2013

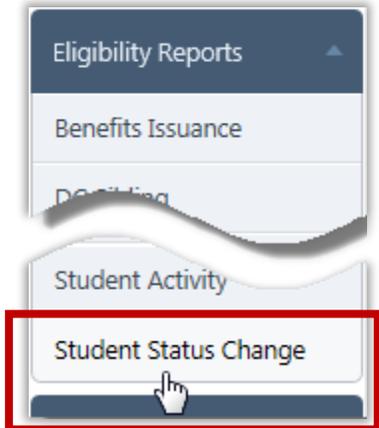
Student ID	Student Name	Grade	Application #	Current Eligibility	Current Reason	Withdrawal Date	Return Date
Site: [redacted]							
215	Mason	4	0 Paid	Paid	Default	01/08/2013	
409	Dawson	4	0 Paid	Paid	Default	01/08/2013	
148	Matthew	5	0 Free	Free	Direct Cert	01/08/2013	
936	Kayla	5	0 Paid	Paid	Default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

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

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.

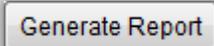
Student Status Change Page

 A screenshot of the 'Student Status Change' page. At the top is a dark blue header with the title 'Student Status Change'. Below the header are two dropdown menus: 'Site Code' with '--ALL--' selected and 'Site' with '--ALL--' selected. Underneath is a 'Date Range' section with three radio button options: 'Daily' (selected), 'Monthly', and 'Date Range'. The 'Daily' option has a 'From' field with '5/21/2013' and a calendar icon. The 'Monthly' option has a 'Month' dropdown set to 'May' and a 'Year' dropdown set to '2013'. The 'Date Range' option has a 'From' field with '5/1/2013', a 'To' field with '5/21/2013', and a calendar icon. At the bottom right of the form is a blue 'Generate Report' button.

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

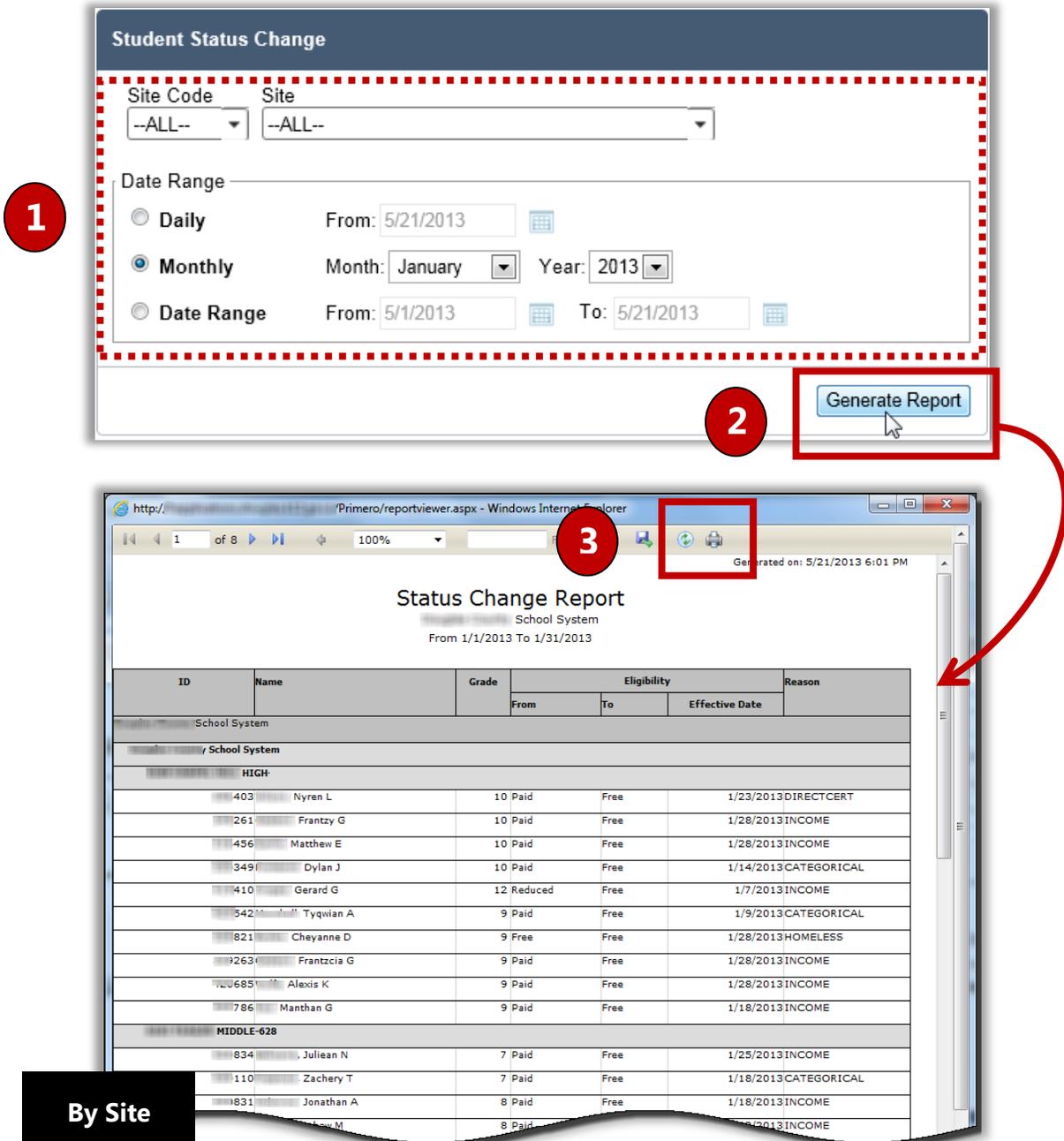
- **Site / Site Code** are set to your site, or set to “**ALL**” if you have access to multiple sites.
- **Date Range** is set to “**Daily**” with the current date selected.

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 **Generate Report**.
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	
School System					
School System					
HIGH					
403	Nyren L	10 Paid	Free	1/23/2013	DIRECTCERT
261	Frantzy 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 Reduced	Free	1/7/2013	INCOME
542	Tyqwian A	9 Paid	Free	1/9/2013	CATEGORICAL
821	Cheyenne D	9 Free	Free	1/28/2013	HOMELESS
263	Frantzia G	9 Paid	Free	1/28/2013	INCOME
685	Alexis K	9 Paid	Free	1/28/2013	INCOME
786	Manthan G	9 Paid	Free	1/18/2013	INCOME
MIDDLE-628					
834	Julian N	7 Paid	Free	1/25/2013	INCOME
110	Zachery T	7 Paid	Free	1/18/2013	CATEGORICAL
831	Jonathan A	8 Paid	Free	1/18/2013	INCOME
		8 Paid			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.

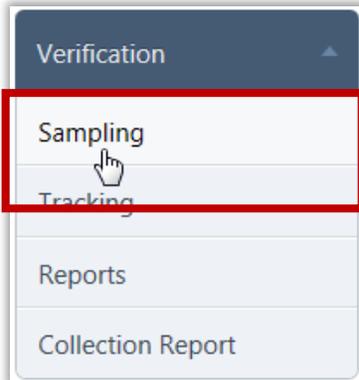
Verification at a Glance

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's a header 'Sampling'. Below it is a form with an 'Area' dropdown menu set to 'Area 1' and an 'Apply' button. A table titled 'Verification Samples' shows one row of data. Below the table is a text block explaining the sampling process and a 'Generate Sample' button. To the right of the text block is a 'Sampling Methods' section with radio buttons for 'Standard (formerly Error Prone)', 'Alternate One (formerly Random)', and 'Alternate Two (formerly Focused)'.

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: 2200 ... 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

Area
Area 1

Verification Samples

Academic Year	Sample Method	Number of Applications	Count	Sample Complete	Sample Date	Generated On	Generated By
2013 - 2014	Standard	3	(1/1)	False	10/24/2013	9/3/2013 9:29 AM	Cybersoft Support

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

2

3

Sampling Methods

Default

- Standard (formerly Error Prone)

Alternate

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

Sample generated successfully!

Sampling

Area
Area 1

Verification Samples

Academic Year	Sample Method	Number of Applications	Count	Sample Complete	Sample Date	Generated On	Generated By
2013 - 2014	Standard	3	(1/1)	False	10/24/2013	9/3/2013 9:29 AM	Cybersoft Support

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

Sampling Methods

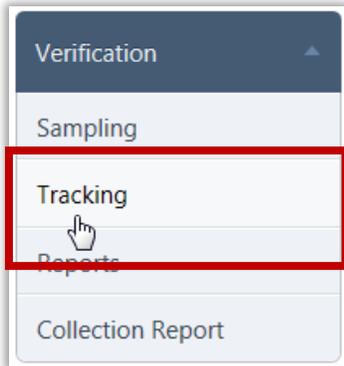
Default

- Standard (formerly Error Prone)

Alternate

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

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

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"/>		

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

1. Click .

Tracking

Area: --ALL-- Academic Year: 2013 - 2014 Verification Status: Verification Incomplete Apply

2013 - 2014 Verification Incomplete Applications

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

2013 - 2014 Verification Incomplete Applications

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 1st Notice notices

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 filters for Area (set to --ALL--), Academic Year (2013 - 2014), and 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 shows '2013 - 2014 Verification Incomplete Applications' with columns for Application #, Eligibility, Basis, Type, 1st Notice, Follow Up, and Completion Notice. The '1st Notice' column header has a checkmark and a checkbox. The 'Print Selected Notices' button is also highlighted with a red circle and a red arrow pointing to the second screenshot.

The second screenshot shows the Tracking page with the same filters. The 'Print Selected Notices' button is highlighted with a red circle and a red arrow pointing to the first screenshot. The table below shows '2013 - 2014 No Response Applications' with columns for Application #, Eligibility, Basis, Type, 1st Notice, Follow Up, and Completion Notice. The '1st Notice' column header has a checkmark and a checkbox. The 'Print Selected Notices' button is also highlighted with a red circle and a red arrow pointing to the first screenshot.

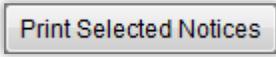
Application #	Eligibility	Basis	Type	1st Notice	Follow Up	Completion Notice
1562	Free	Income	Cause	✓ <input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1565	Free	Income	Cause	✓ <input checked="" type="checkbox"/>	✓ <input type="checkbox"/>	<input type="checkbox"/>

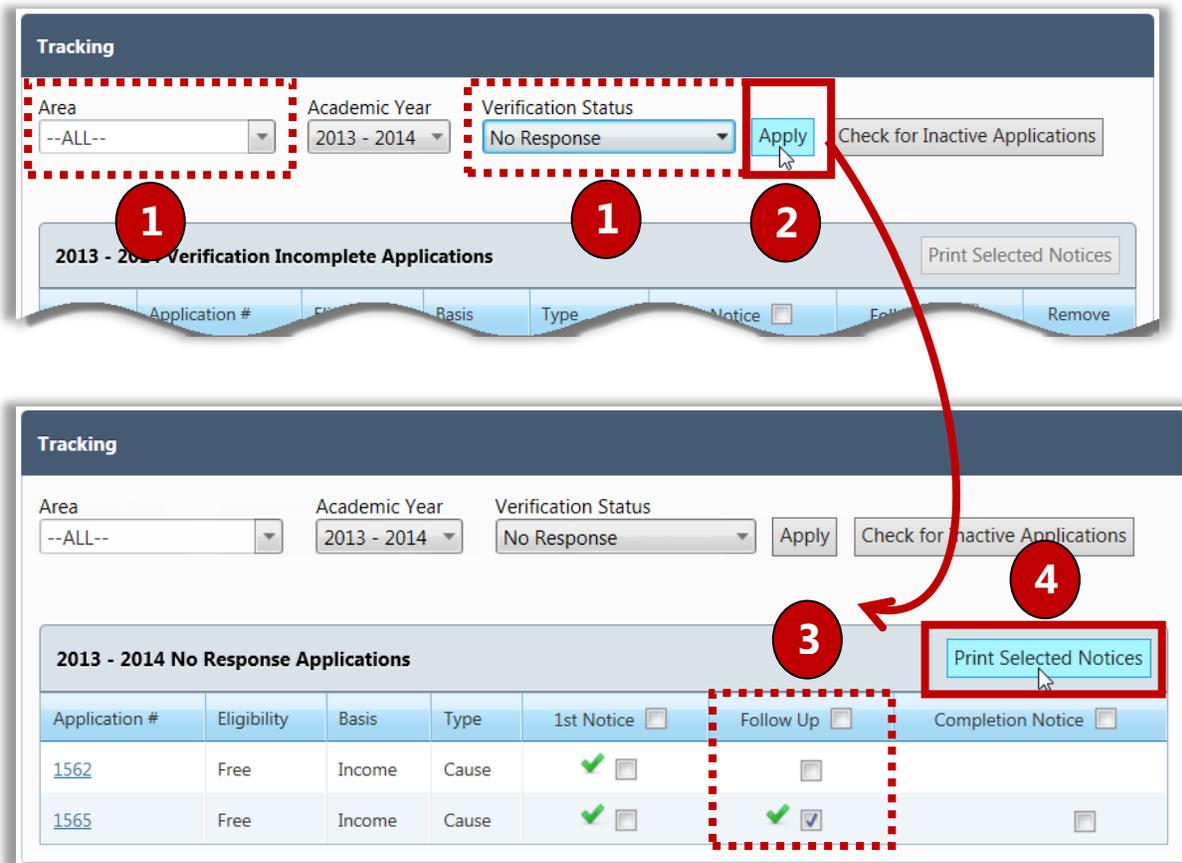
A success message appears above the **Tracking** page when letters have been printed. The green check mark indicates that the verification letter has been printed for that application.

Sending Follow-Up Notices

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

To print Follow-Up notices

1. Select 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  .



The first screenshot shows the 'Tracking' interface with the following settings: Area: --ALL--, Academic Year: 2013 - 2014, Verification Status: No Response, and the 'Apply' button highlighted. The table below shows '2013 - 2014 Verification Incomplete Applications'.

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

The second screenshot shows the same interface after clicking 'Apply'. The table now shows '2013 - 2014 No Response Applications'. The 'Follow Up' column is selected, and the 'Print Selected Notices' button is highlighted.

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

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, and a red circle labeled '1' is placed near 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, and the 'Print Selected Notices' button is highlighted with a red box and a red circle labeled '4'. A red dashed box highlights the table header and the 'Print Selected Notices' button. A red circle labeled '3' is placed near the 'Completion Notice' checkbox, and a red circle labeled '4' is placed near the 'Print Selected Notices' button. A red arrow points from the 'Apply' button in the first screenshot to the 'Print Selected Notices' button in the second screenshot.

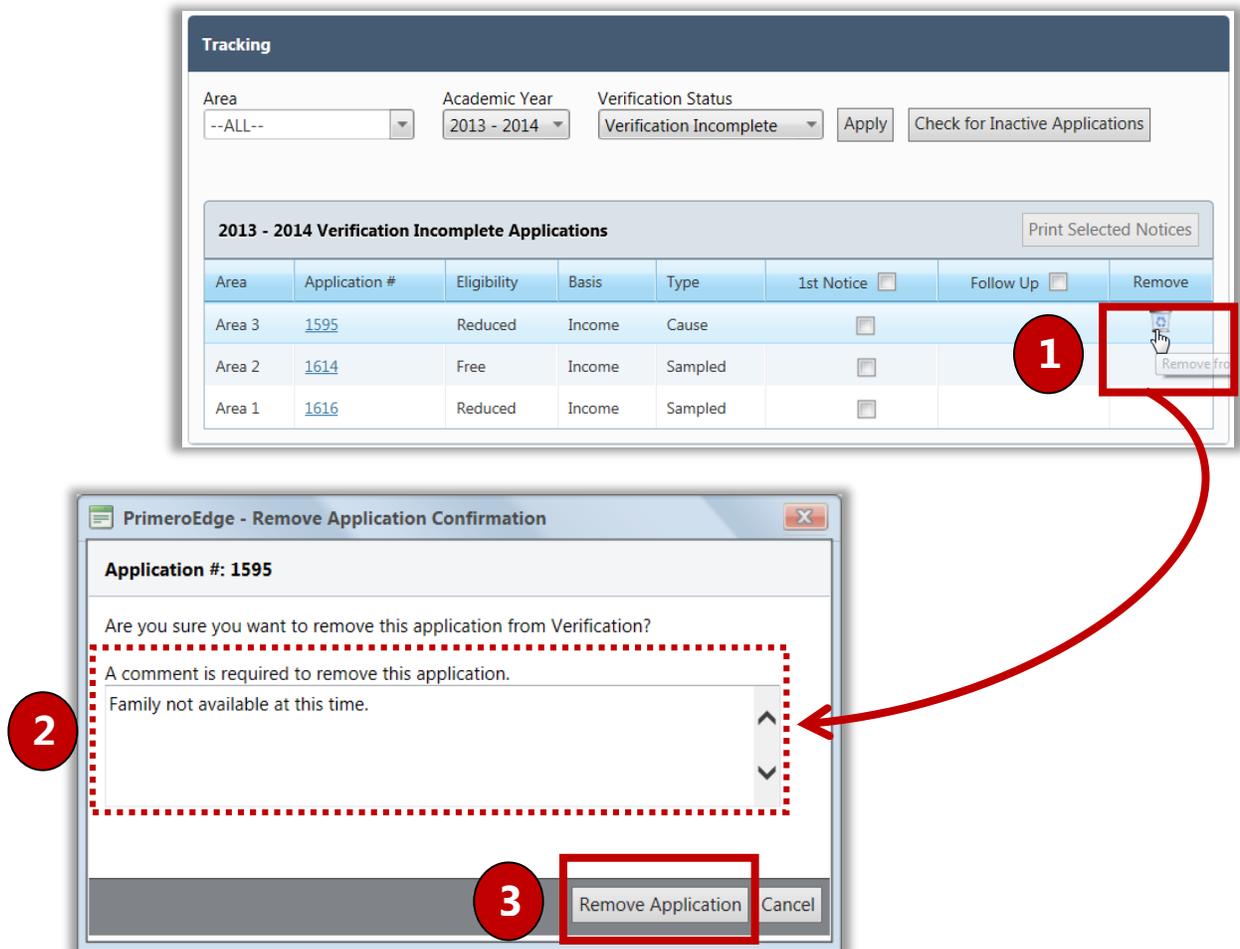
Application #	Eligibility	Basis	Type	1st Notice <input type="checkbox"/>	Follow Up <input type="checkbox"/>	Completion Notice <input checked="" type="checkbox"/>
1562	Free	Income	Cause	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1565	Free	Income	Cause	<input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

Removing an Application from Tracking

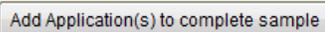
Districts are allowed to remove and replace up to 5% of their sample applications when the LEA believes that the household is fragile or will be unable to respond to the verification attempts. It is up to each district to follow the guidelines of 5% if they choose to remove applications.

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.

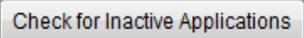
Click  to add applications to the verification sample.

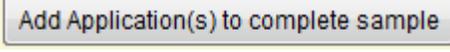
Replacing Inactive Applications

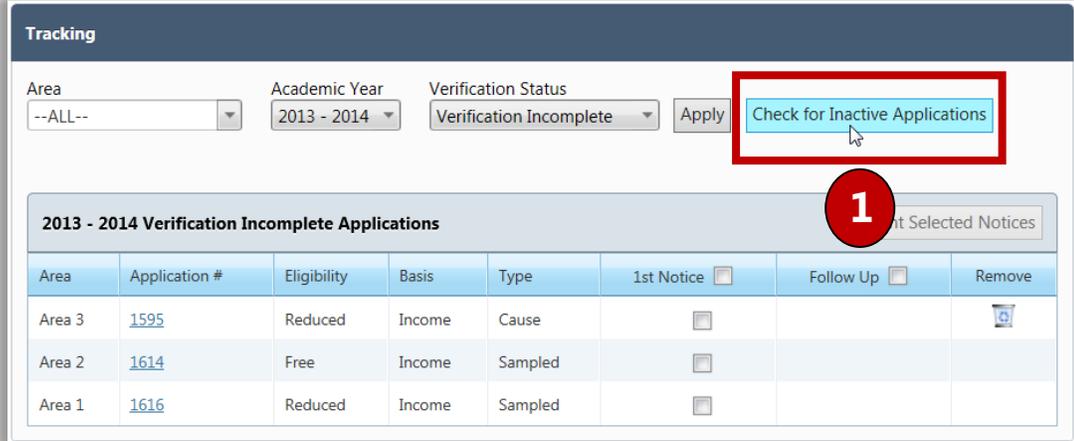
If all students on a selected application become inactive, the application must be replaced. It is important to check for inactive applications frequently (most districts do this daily) so that you may begin the Verification on the newly selected application as soon as possible.

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 .

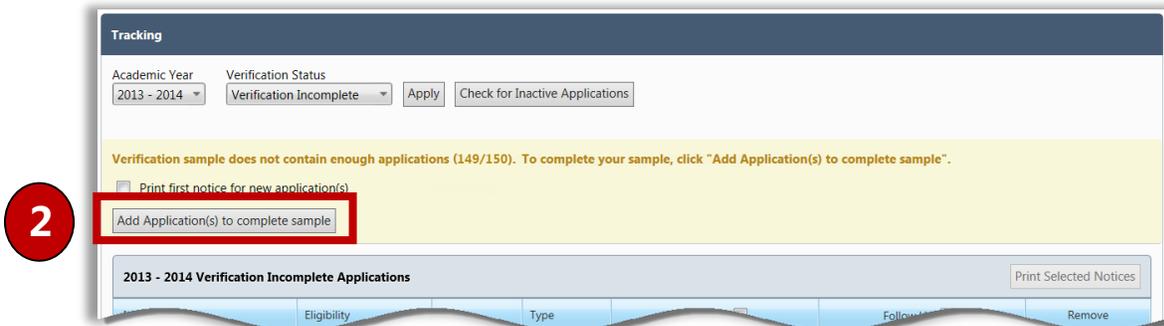


Tracking

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"/>		



Tracking

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

Verification sample does not contain enough applications (149/150). To complete your sample, click "Add Application(s) to complete sample".

Print first notice for new application(s)

Add Application(s) to complete sample

2013 - 2014 Verification Incomplete Applications Print Selected Notices

Area	Application #	Eligibility	Basis	Type	1st Notice <input type="checkbox"/>	Follow Up <input type="checkbox"/>	Remove
------	---------------	-------------	-------	------	-------------------------------------	------------------------------------	--------

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.

Tracking

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

2013 - 2014 Verification Incomplete Applications

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

Application #: 1614 (1 of 1) **Batch #:** 561

Validate Notification ...

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

Verify Response Verification Result Summary

Student Details

Students

Student ID	Name	Foster
	KAITLYN J	<input type="checkbox"/>

Income Household

Income Details

Total Income (M) \$1,650.00 Household Size: 2

Household Members Add Member ...

Name	Income Type	Income Amount	No Income	Edit	Delete
KAITLYN J	Job	\$1,650.00(M)	<input type="checkbox"/>		
Member 2			<input checked="" type="checkbox"/>		

SNAP/TANF Household

SNAP/TANF Details

Confirmed Case # SNAP

Not Confirmed

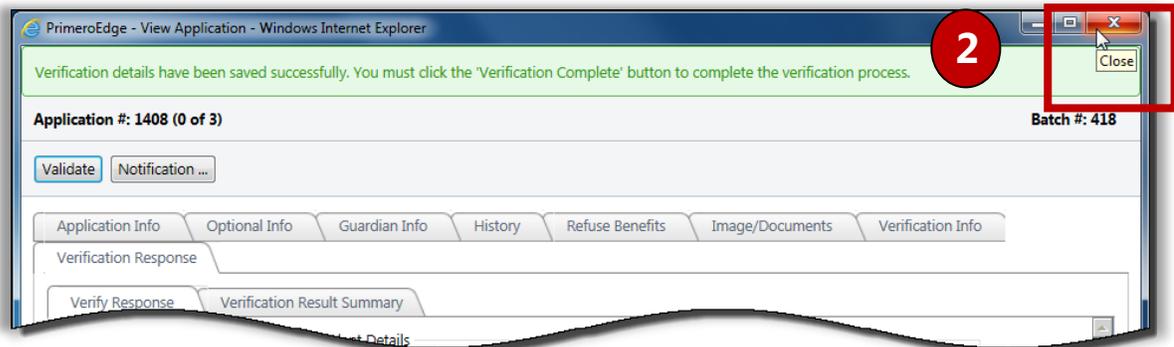
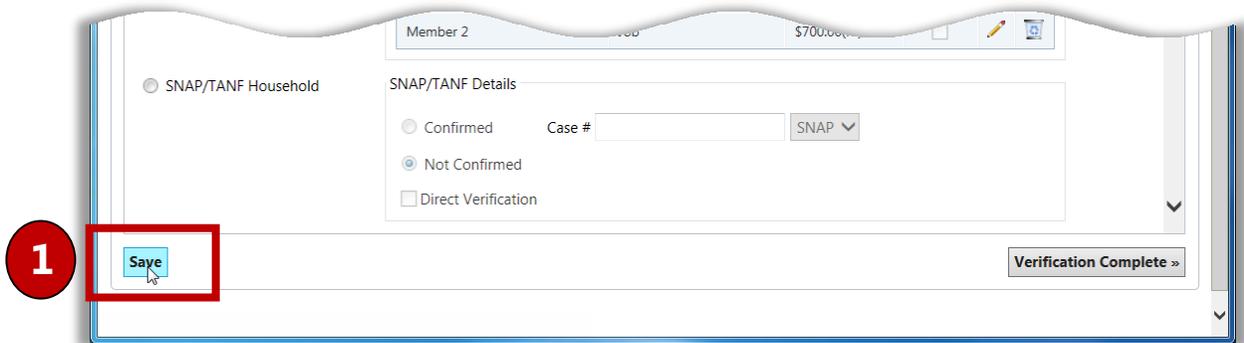
Direct Verification

Save Verification Complete >>

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:

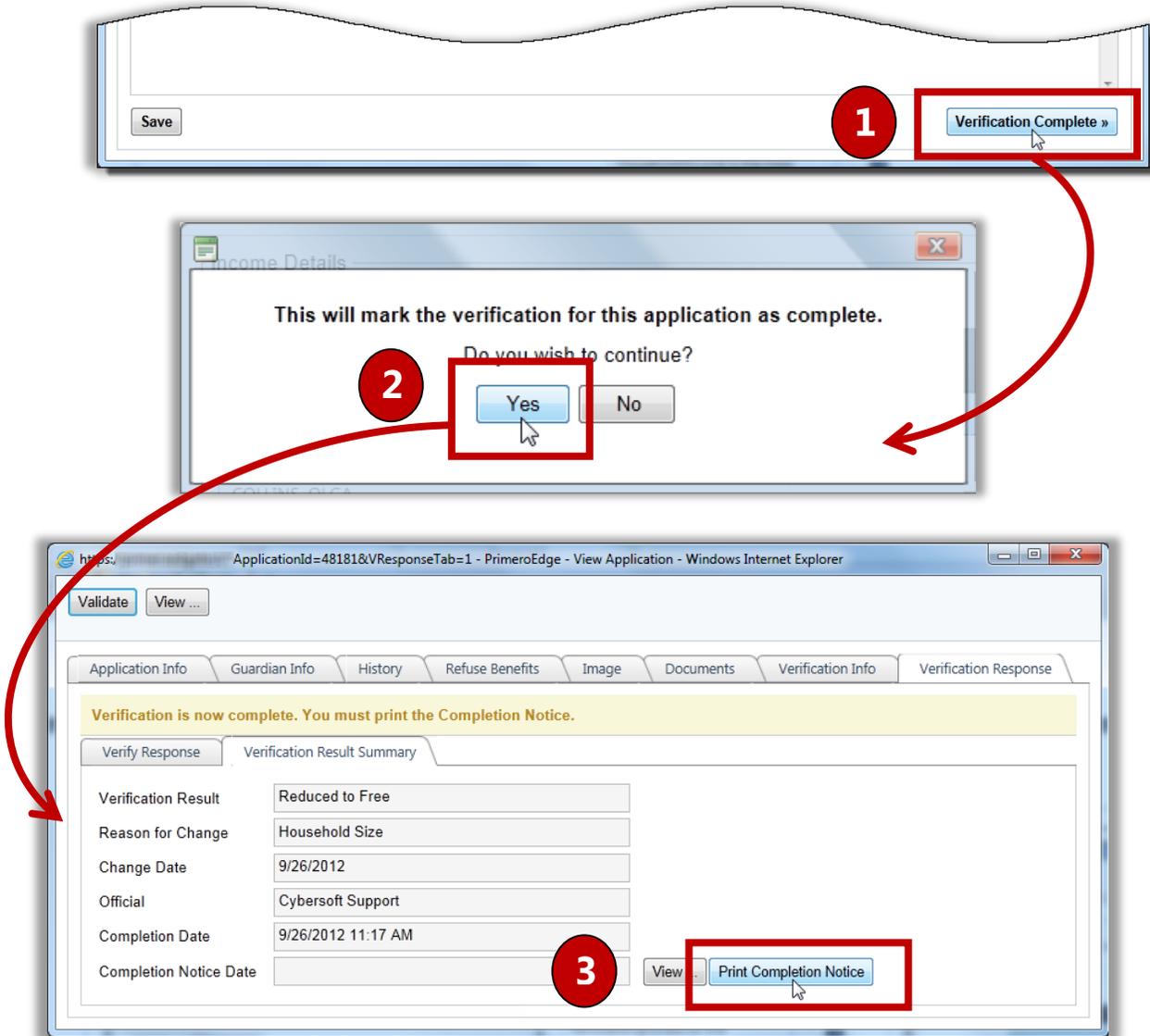
1. Click **Save** .
2. Click **Close** ().



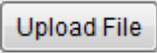
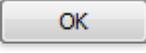
To save the data and complete Verification

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.



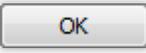
To upload a document

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

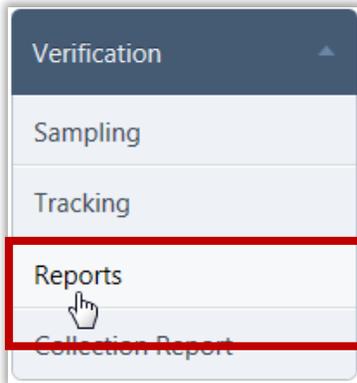
To view a scanned document

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.

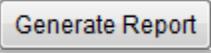
Reports Page

 A screenshot of the "Reports" page in a web application. At the top, there is a dark blue header with the word "Reports" in white. Below the header, there are two dropdown menus: "Area" with "--ALL--" selected and "Academic Year" with "2013 - 2014" selected. Underneath these is a section titled "Verification Reports" containing a list of six radio button options: "Application Images" (which is selected), "Pre-Verification Details", "Verification Results Details", "Verification Worksheet", "Verification Student List", and "Verification Tracking Forms". At the bottom right of the page, there is a "Generate Report" button.

By default on the **Reports** page:

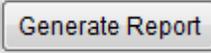
- **Area** is set to “ALL” if you have access to multiple areas, otherwise it is set to your area.
- **Academic Year** is set to the current school year.
- **Application Images** is selected in the Verification Reports group.

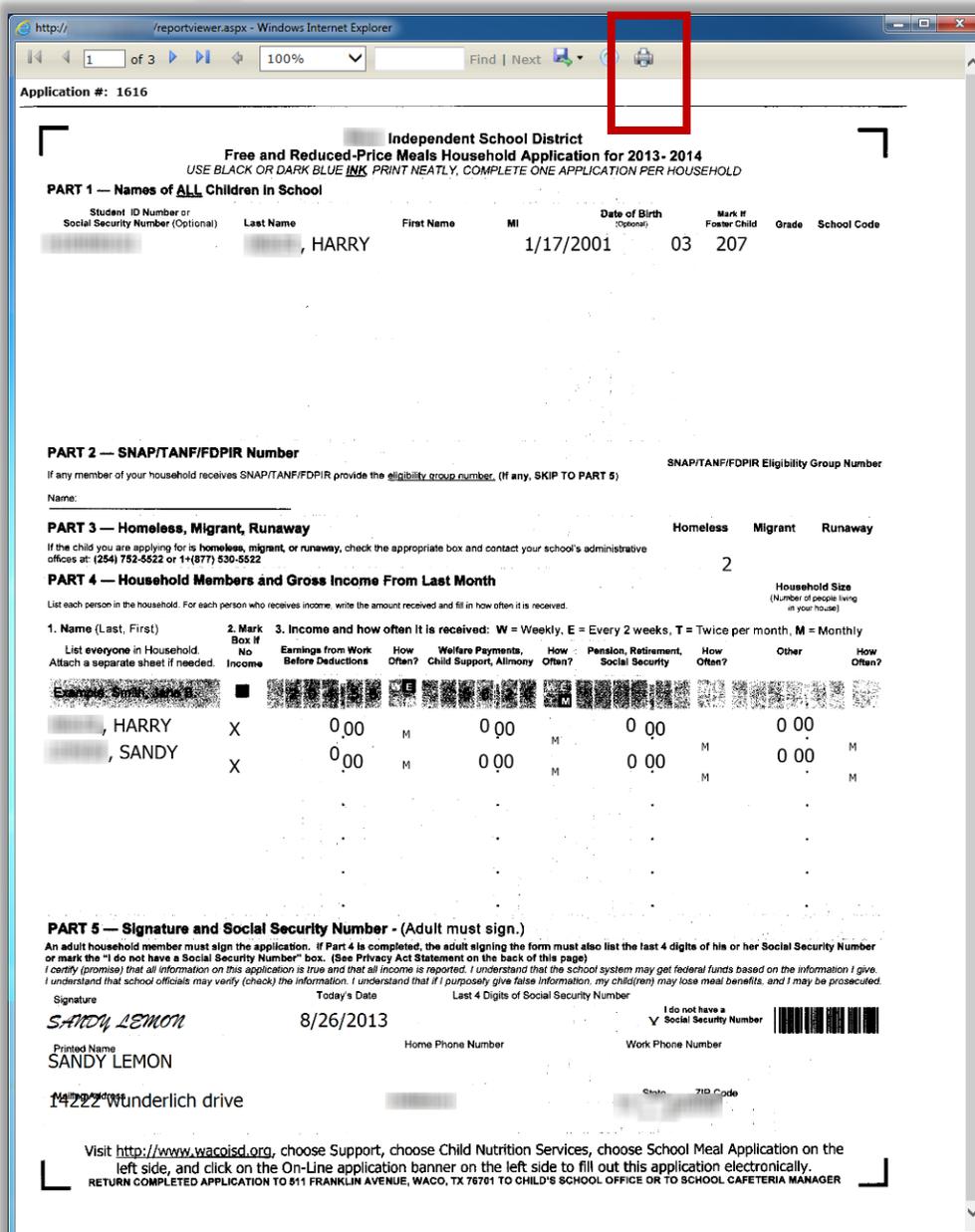
Page Functions

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 (Optional)	Mark if Foster Child	Grade	School Code
		HARRY		1/17/2001	03	207	

PART 2 — SNAP/TANF/FDPIR Number
If any member of your household receives SNAP/TANF/FDPIR provide the eligibility group number. (If any, SKIP TO PART 5)
SNAP/TANF/FDPIR Eligibility Group Number: 2

PART 3 — Homeless, Migrant, Runaway
If the child you are applying for is homeless, migrant, or runaway, check the appropriate box and contact your school's administrative offices at: (254) 752-5522 or 1-(877) 530-5522
Homeless: Migrant: Runaway:

PART 4 — Household Members and Gross Income From Last Month
List each person in the household. For each person who receives income, write the amount received and fill in how often it is received.
Household Size (Number of people living in your house): 2

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									
		Earnings from Work Before Deductions	How Often?	Welfare Payments, Child Support, Alimony	How Often?	Pension, Retirement, Social Security	How Often?	Other	How Often?		
HARRY	X	0.00	M	0.00	M	0.00	M	0.00	M		
SANDY	X	0.00	M	0.00	M	0.00	M	0.00	M		

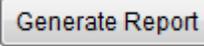
PART 5 — Signature and Social Security Number - (Adult must sign.)
An adult household member must sign the application. If Part 4 is completed, the adult signing the form must also list the last 4 digits of his or her Social Security Number or mark the "I do not have a Social Security Number" box. (See Privacy Act Statement on the back of this page)
I certify (promise) that all information on this application is true and that all income is reported. I understand that the school system may get federal funds based on the information I give. I understand that school officials may verify (check) the information. I understand that if I purposely give false information, my child(ren) may lose meal benefits, and I may be prosecuted.

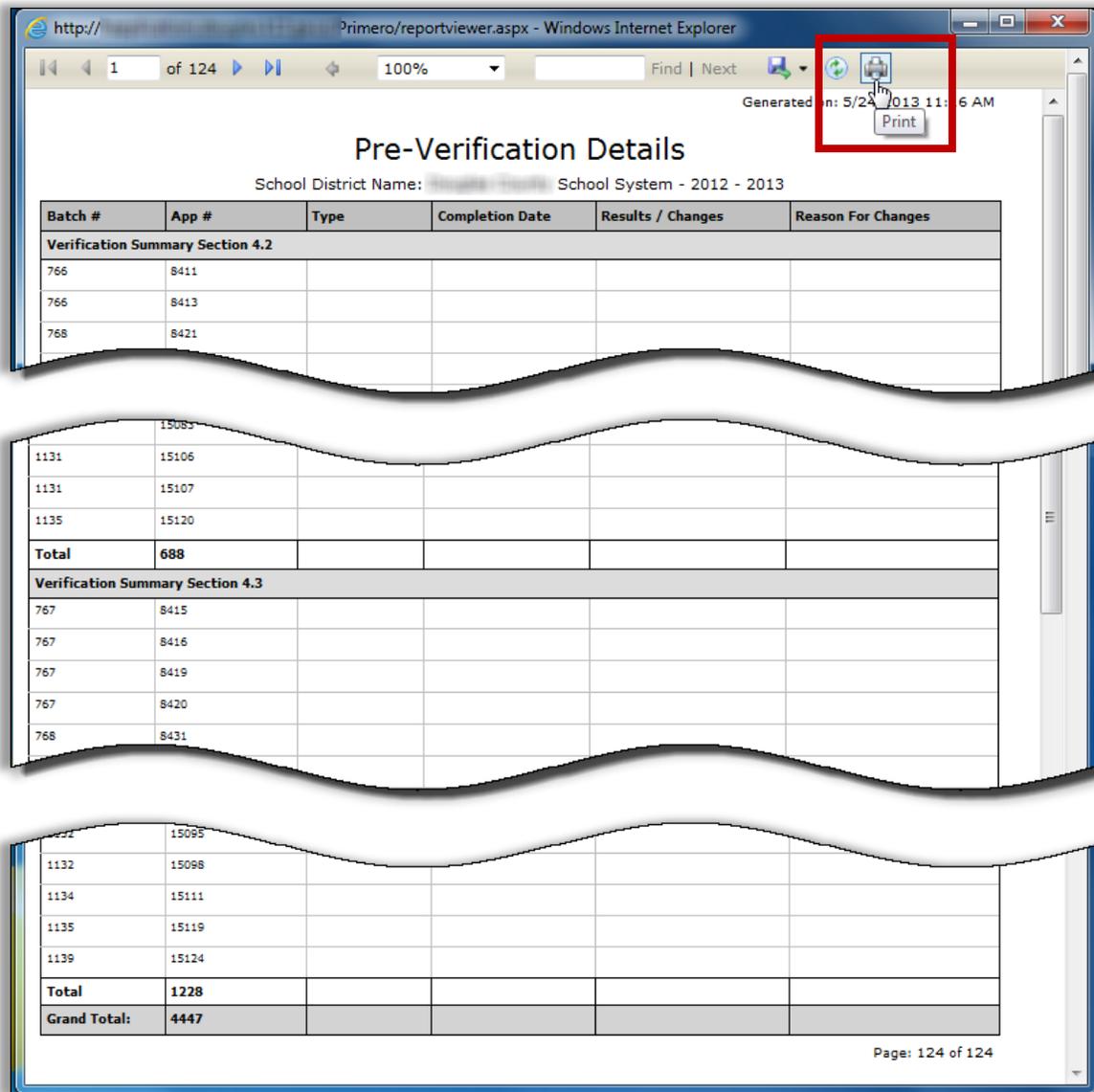
Signature: SANDY LEMON
Today's Date: 8/26/2013
Last 4 Digits of Social Security Number:
I do not have a Social Security Number:
Printed Name: SANDY LEMON
Home Phone Number:
Work Phone Number:
Address: 14222 Wunderlich drive
State: ZIP Code:

Visit <http://www.wacoisd.org>, choose Support, choose Child Nutrition Services, choose School Meal Application on the left side, and click on the On-Line application banner on the left side to fill out this application electronically.
RETURN COMPLETED APPLICATION TO 511 FRANKLIN AVENUE, WACO, TX 76701 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

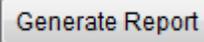
School District Name: [redacted] School System - 2012 - 2013

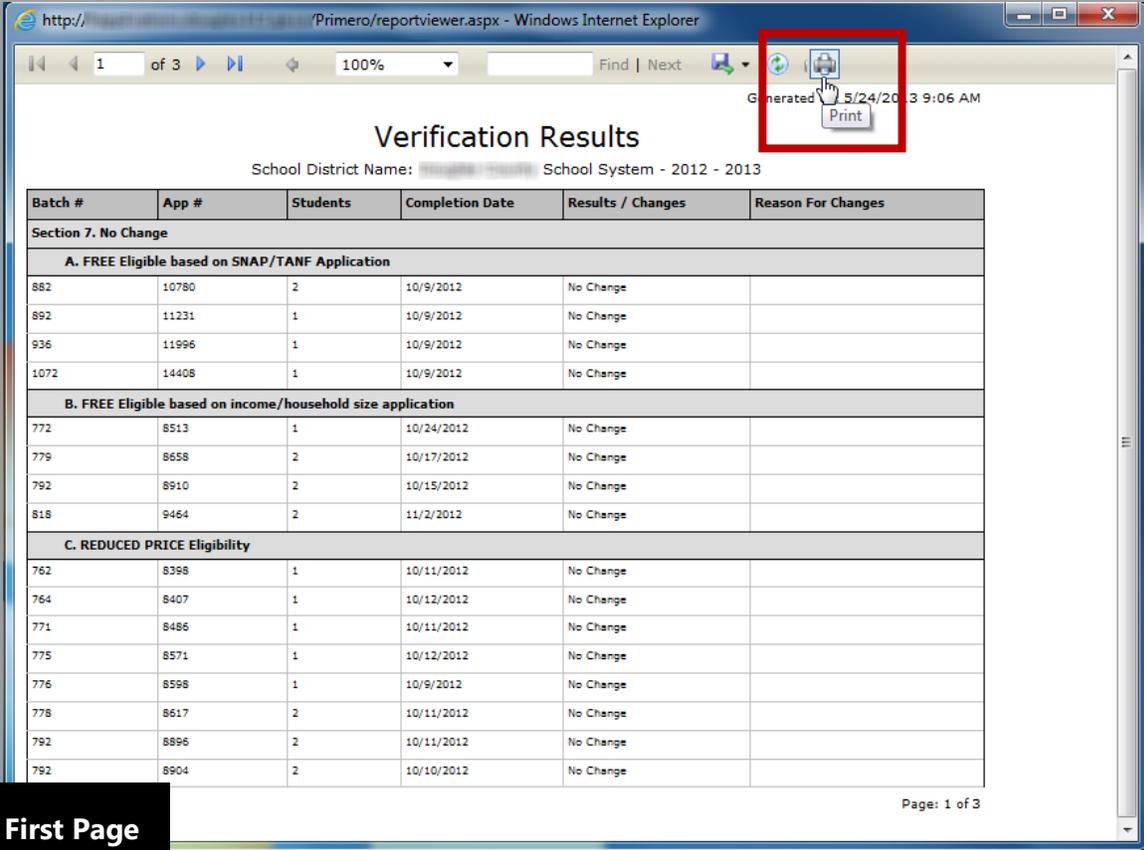
Batch #	App #	Type	Completion Date	Results / Changes	Reason For Changes
Verification Summary Section 4.2					
766	8411				
766	8413				
768	8421				
...					
1131	15106				
1131	15107				
1135	15120				
Total	688				
Verification Summary Section 4.3					
767	8415				
767	8416				
767	8419				
767	8420				
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** ()



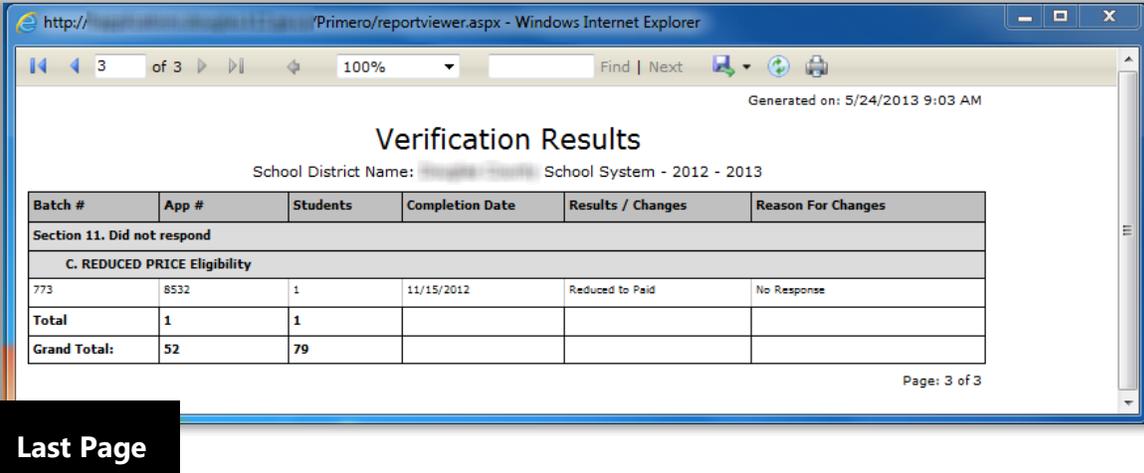
Generated on: 5/24/2013 9:06 AM

Verification Results

School District Name: [redacted] 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



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Verification Results

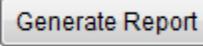
School District Name: [redacted] School System - 2012 - 2013

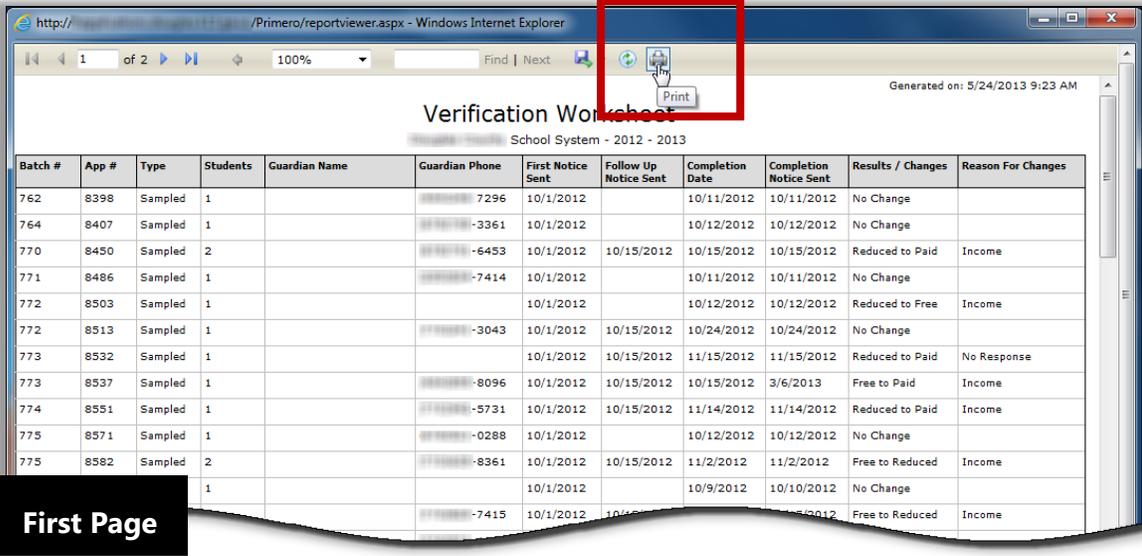
Batch #	App #	Students	Completion Date	Results / Changes	Reason For Changes
Section 11. Did not respond					
C. REDUCED PRICE Eligibility					
773	8532	1	11/15/2012	Reduced to Paid	No Response
Total	1	1			
Grand Total:	52	79			

Page: 3 of 3

Verification Worksheet

To generate and print a Verification Worksheet

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



Generated on: 5/24/2013 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		7296	10/1/2012		10/11/2012	10/11/2012	No Change	
764	8407	Sampled	1		-3361	10/1/2012		10/12/2012	10/12/2012	No Change	
770	8450	Sampled	2		-6453	10/1/2012	10/15/2012	10/15/2012	10/15/2012	Reduced to Paid	Income
771	8486	Sampled	1		-7414	10/1/2012		10/11/2012	10/11/2012	No Change	
772	8503	Sampled	1			10/1/2012		10/12/2012	10/12/2012	Reduced to Free	Income
772	8513	Sampled	1		-3043	10/1/2012	10/15/2012	10/24/2012	10/24/2012	No Change	
773	8532	Sampled	1			10/1/2012	10/15/2012	11/15/2012	11/15/2012	Reduced to Paid	No Response
773	8537	Sampled	1		-8096	10/1/2012	10/15/2012	10/15/2012	3/6/2013	Free to Paid	Income
774	8551	Sampled	1		-5731	10/1/2012	10/15/2012	11/14/2012	11/14/2012	Reduced to Paid	Income
775	8571	Sampled	1		-0288	10/1/2012		10/12/2012	10/12/2012	No Change	
775	8582	Sampled	2		-8361	10/1/2012	10/15/2012	11/2/2012	11/2/2012	Free to Reduced	Income
			1			10/1/2012		10/9/2012	10/10/2012	No Change	
					-7415	10/1/2012	10/15/2012	10/15/2012	10/15/2012	Free to Reduced	Income

First Page

818	9452	Sampled	2			10/1/2012		10/9/2012	10/9/2012	No Change	
818	9458	Sampled	1		-9452	10/1/2012	10/15/2012	10/26/2012	10/26/2012	No Change	
818	9464	Sampled	2		-7679	10/1/2012	10/15/2012	11/2/2012	11/2/2012	No Change	
859	10319	Cause	2		-6329	4/4/2013	4/15/2013	4/19/2013	4/19/2013	No Change	
882	10780	Sampled	2		-8150	10/1/2012		10/9/2012	10/11/2012	No Change	
892	11231	Sampled	1		-4913	10/1/2012		10/9/2012	10/9/2012	No Change	
936	11996	Sampled	1		-5003	10/1/2012		10/9/2012	10/9/2012	No Change	
1033	13960	Cause	3			9/7/2012	9/17/2012	10/3/2012	10/3/2012	Free to Paid	No Response
1072	14408	Sampled	1		-8389	10/1/2012		10/9/2012	10/9/2012	No Change	
1362	16106	Cause	2		-1827	3/1/2013	3/6/2013	3/15/2013	3/15/2013	Reduced to Free	Income
Total:	52		82								

Page: 2 of 2

Last Page

Verification Student List

To generate and print a Verification Student List report

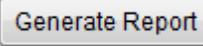
1. Select **Verification Student List**.
2. Enter **Site Code** and **Site**, if needed and click **Generate Report**.
3. Click **Print** ().

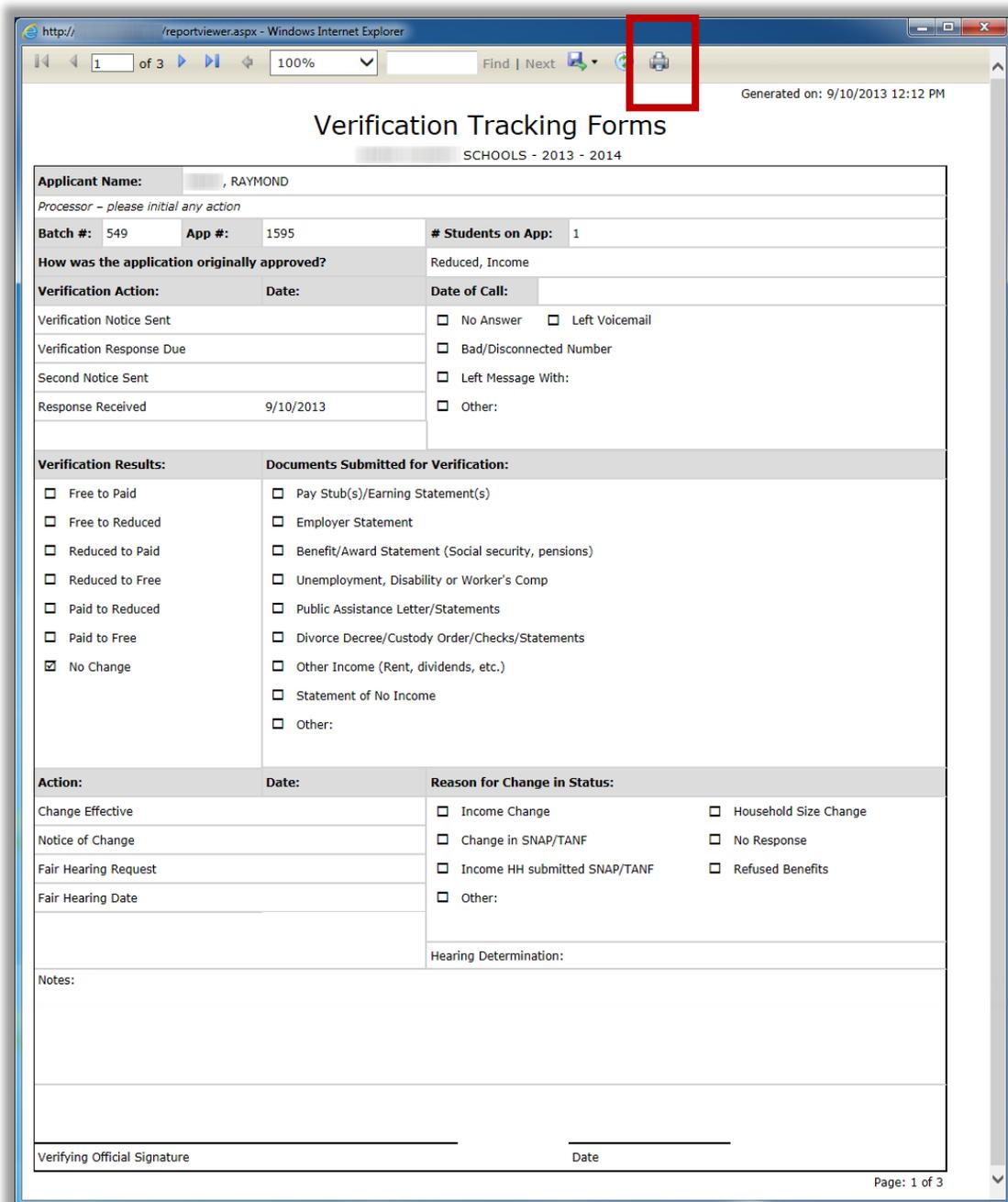
Batch #	App #	Type	Student Name	Guardian Name	Guardian Phone	First Notice Sent	Follow Up Notice Sent	Completion Date
Site: [redacted]								
778	8617	Sampled	Khalista		[redacted]-1469	10/1/2012		10/11/2012
795	8987	Sampled	Samuel		[redacted]-9565	10/1/2012	10/15/2012	10/29/2012
Site: [redacted]								
776	8598	Sampled	Devin			10/1/2012		10/9/2012
770	8450	Sampled	Krista		[redacted]-6453	10/1/2012	10/15/2012	10/15/2012
770	8450	Sampled	William		[redacted]-5419	10/1/2012	10/15/2012	10/15/2012
Site: [redacted]								
793	8937	Sampled	Jada		[redacted]-7808	10/1/2012	10/15/2012	10/17/2012
Site: [redacted]								
51		Sampled	Caleb		[redacted]-5731	10/1/2012	10/15/2012	11/14/2012
			Savannah				10/15/2012	10/15/2012

Batch #	App #	Type	Student Name	Guardian Name	Guardian Phone	First Notice Sent	Follow Up Notice Sent	Completion Date
783	8735	Sampled	Cole		[redacted]-8213	10/1/2012	10/15/2012	10/26/2012
785	8780	Sampled	Macie		[redacted]-8794	10/1/2012	10/15/2012	10/15/2012
Site: [redacted]								
792	8896	Sampled	Lauren		[redacted]-1673	10/1/2012		10/11/2012
Site: [redacted]								
783	8737	Sampled	Desmond		[redacted]-6822	10/1/2012	10/15/2012	10/19/2012
Site: [redacted]								
813	9352	Sampled	Cameron		[redacted]-4158	10/1/2012	10/15/2012	10/15/2012
882	10780	Sampled	Astin		[redacted]-8150	10/1/2012		10/9/2012
882	10780	Sampled	Aryun		[redacted]-8150	10/1/2012		10/9/2012
Site: [redacted]								
809	9253	Sampled	Giovanni		[redacted]-5247	10/1/2012	10/15/2012	10/16/2012
817	9424	Sampled	Kaleigh		[redacted]-4031	10/1/2012	10/15/2012	11/5/2012
Total Students :			82					

Verification Tracking Forms

To generate and print Verification Tracking Forms

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



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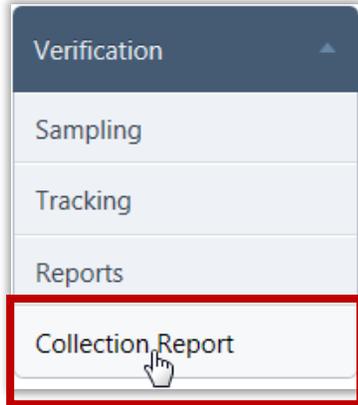
Verification Tracking Forms

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	<input type="checkbox"/> No Answer <input type="checkbox"/> Left Voicemail
Verification Response Due	<input type="checkbox"/> Bad/Disconnected Number
Second Notice Sent	<input type="checkbox"/> Left Message With:
Response Received	9/10/2013 <input type="checkbox"/> Other:
Verification Results:	
Documents Submitted for Verification:	
<input type="checkbox"/> Free to Paid	<input type="checkbox"/> Pay Stub(s)/Earning Statement(s)
<input type="checkbox"/> Free to Reduced	<input type="checkbox"/> Employer Statement
<input type="checkbox"/> Reduced to Paid	<input type="checkbox"/> Benefit/Award Statement (Social security, pensions)
<input type="checkbox"/> Reduced to Free	<input type="checkbox"/> Unemployment, Disability or Worker's Comp
<input type="checkbox"/> Paid to Reduced	<input type="checkbox"/> Public Assistance Letter/Statements
<input type="checkbox"/> Paid to Free	<input type="checkbox"/> Divorce Decree/Custody Order/Checks/Statements
<input checked="" type="checkbox"/> No Change	<input type="checkbox"/> Other Income (Rent, dividends, etc.)
	<input type="checkbox"/> Statement of No Income
	<input type="checkbox"/> Other:
Action:	
Date:	
Reason for Change in Status:	
Change Effective	<input type="checkbox"/> Income Change <input type="checkbox"/> Household Size Change
Notice of Change	<input type="checkbox"/> Change in SNAP/TANF <input type="checkbox"/> No Response
Fair Hearing Request	<input type="checkbox"/> Income HH submitted SNAP/TANF <input type="checkbox"/> Refused Benefits
Fair Hearing Date	<input type="checkbox"/> Other:
Hearing Determination:	
Notes:	
Verifying Official Signature _____	
Date _____	

Page: 1 of 3

Collection Report



Collection Report is a two-page report that summarizes verification data. The report is submitted for SFAs that participate in the National School Lunch Program and/or the School Breakfast Program (SBP).

Initial report data is submitted to the 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



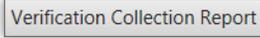
By default on the Collection Report page:

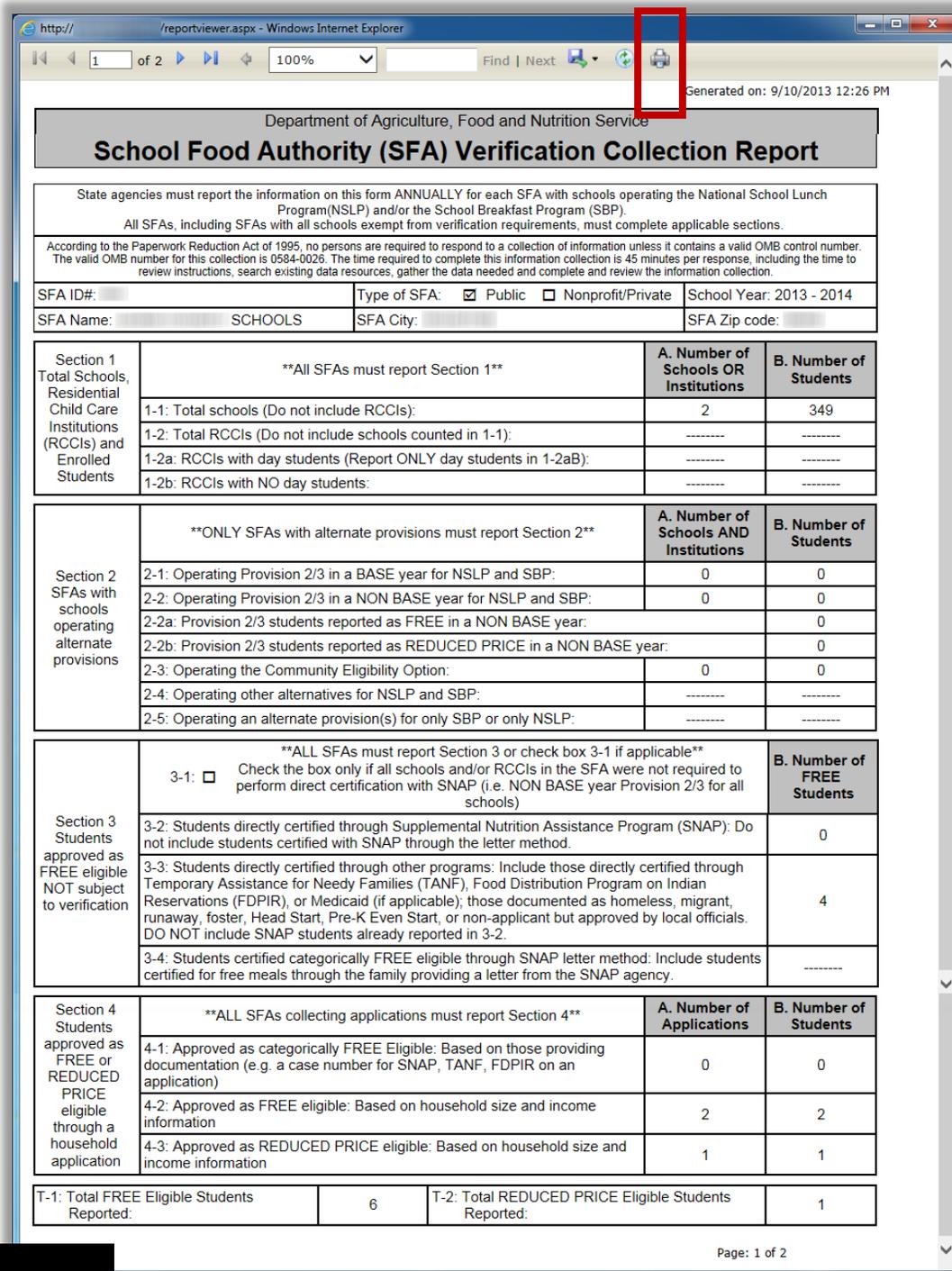
- **Area** is set to the first area if you have access to multiple areas.
- **Academic Year** is set to the current school year.

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	0
	2-2b: Provision 2/3 students reported as REDUCED PRICE in a NON BASE year:		0	0
	2-3: Operating the Community Eligibility Option:		0	0
2-4: Operating other alternatives for NSLP and SBP:		-----	-----	
2-5: Operating an alternate provision(s) for only SBP or only NSLP:		-----	-----	

Section 3 Students approved as FREE eligible NOT subject to verification	**ALL SFAs must report Section 3 or check box 3-1 if applicable**		B. Number of FREE Students	
	3-1: <input type="checkbox"/> Check the box only if all schools and/or RCCIs in the SFA were not required to perform direct certification with SNAP (i.e. NON BASE year Provision 2/3 for all schools)			
	3-2: Students directly certified through Supplemental Nutrition Assistance Program (SNAP): Do not include students certified with SNAP through the letter method.			0
	3-3: Students directly certified through other programs: Include those directly certified through Temporary Assistance for Needy Families (TANF), Food Distribution Program on Indian Reservations (FDPIR), or Medicaid (if applicable); those documented as homeless, migrant, runaway, foster, Head Start, Pre-K Even Start, or non-applicant but approved by local officials. DO NOT include SNAP students already reported in 3-2.			4
3-4: Students certified categorically FREE eligible through SNAP letter method: Include students certified for free meals through the family providing a letter from the SNAP agency.			-----	

Section 4 Students approved as FREE or REDUCED PRICE eligible through a household application	**ALL SFAs collecting applications must report Section 4**		A. Number of Applications	B. Number of Students
	4-1: Approved as categorically FREE Eligible: Based on those providing documentation (e.g. a case number for SNAP, TANF, FDPIR on an application)		0	0
	4-2: Approved as FREE eligible: Based on household size and income information		2	2
	4-3: Approved as REDUCED PRICE eligible: Based on household size and income information		1	1

T-1: Total FREE Eligible Students Reported:	6	T-2: Total REDUCED PRICE Eligible Students Reported:	1
---	---	--	---

Page: 1 of 2

http:// /reportviewer.aspx - Windows Internet Explorer
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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.

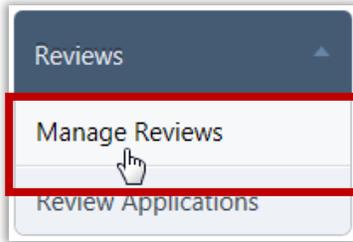
Reviews at a Glance

Menu Function	Description
Manage Reviews	Set up an auditor to review applications.
Review Applications	Review applications included in a 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 dark blue header with the title 'Manage Reviews'. Below the header, there is a section for 'Academic Year' with a dropdown menu set to '2012 - 2013' and an 'Apply' button. Below this is a 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]

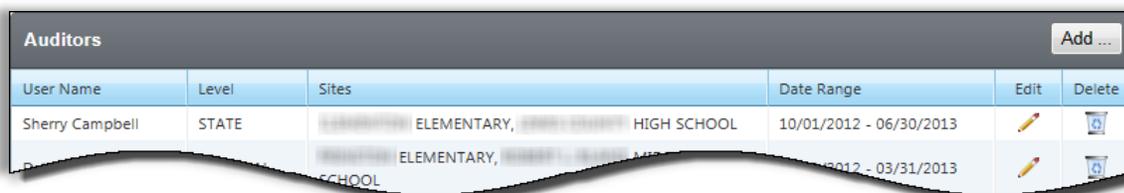
By default, on the **Manage Reviews** page:

- **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.

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 screenshots illustrate the process of adding an auditor in three steps:

- Step 1:** In the **Manage Reviews** window, the **Add ...** button is highlighted with a red circle and arrow.
- Step 2:** The **Add / Edit Auditor** popup is shown. The **User** is set to **Sherry Campbell - STATE**, **Start Date** is **5/24/2013**, and **End Date** is **6/30/2013**. The **Save** button is highlighted with a red circle and arrow.
- Step 3:** The **Add / Edit Auditor** popup shows the **Assigned Sites** table. The **Add Site** and **Save** buttons are highlighted with red circles and arrows.

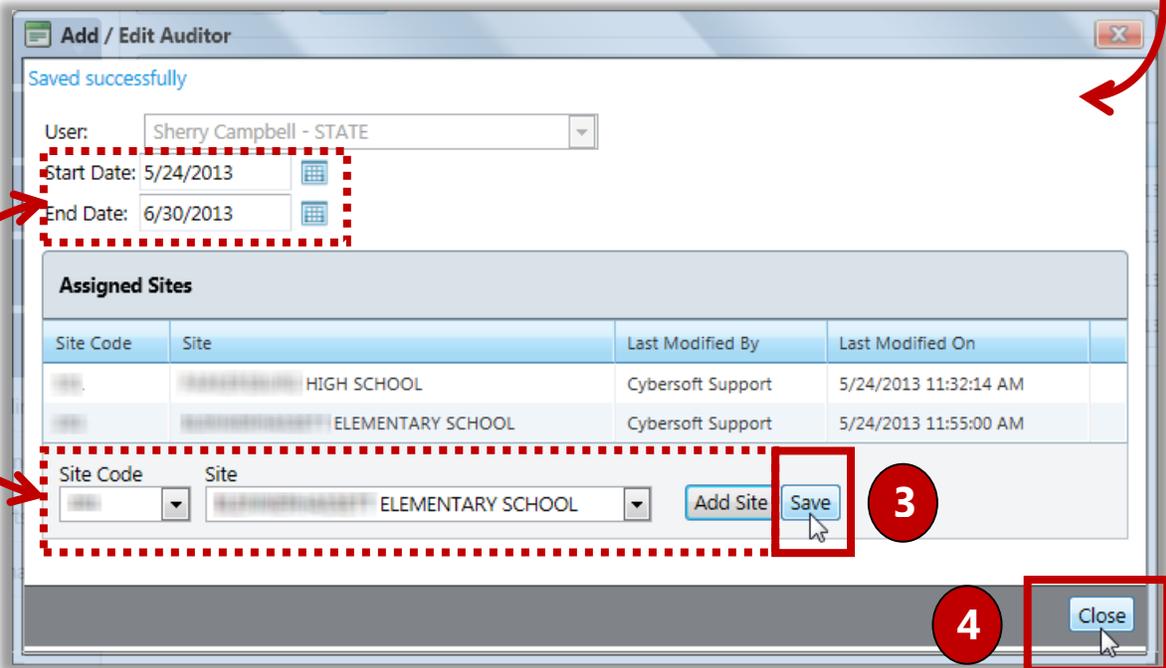
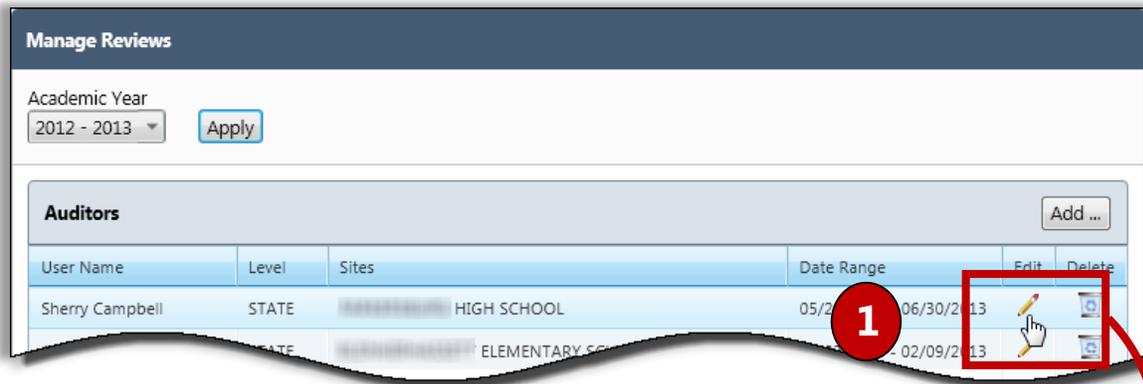
The **Assigned Sites** table in the final screenshot contains the following data:

Site Code	Site	Last Modified By	Last Modified On
[...]	[...] HIGH SCHOOL	Cybersoft Support	5/24/2013 11:32:14 AM

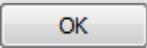
To change Auditor details

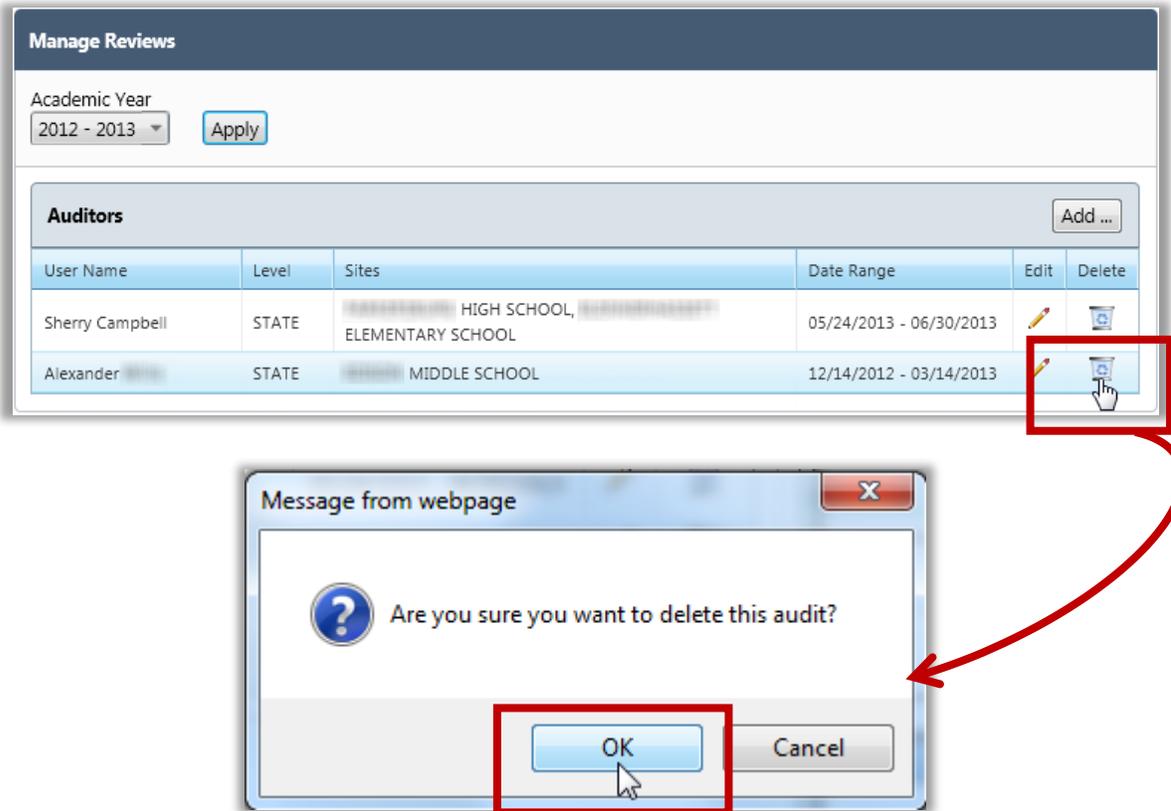
1. Click **Edit** (✎) in an Auditor listing.
2. Enter or select new review dates and add sites, as needed.
3. Click **Save**.
4. Click **Close**.

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

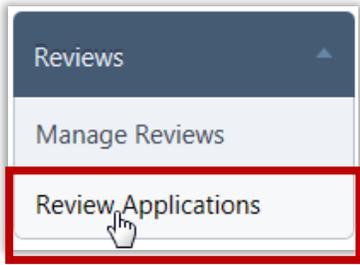


To delete an Auditor

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

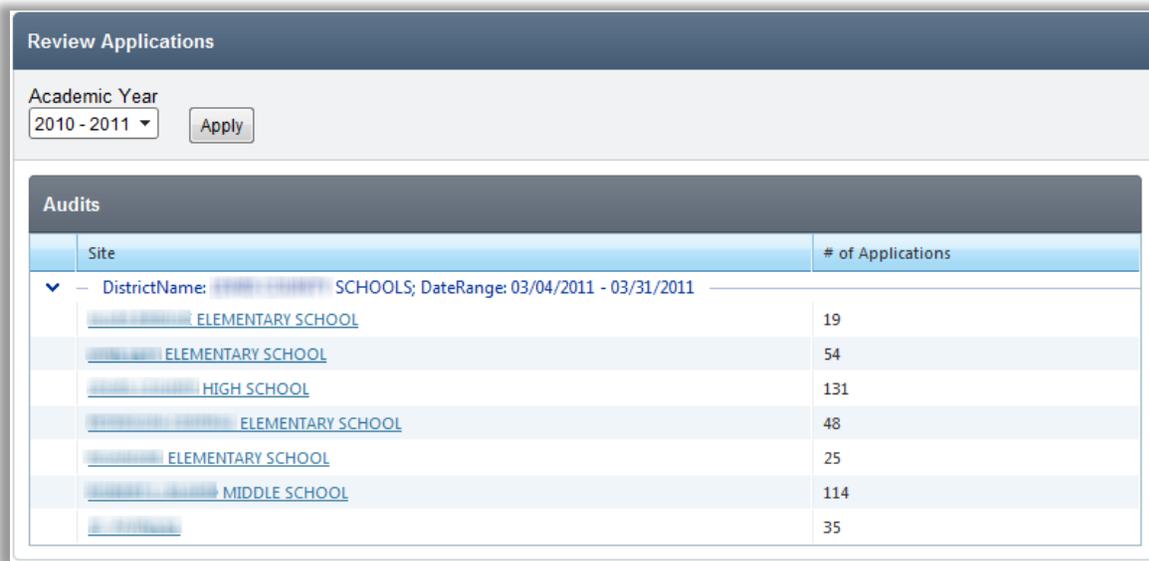


Review Applications



Review Applications allows you to review applications included in an audit for a selected school year. Application details as well as summary statistics can be viewed.

Review Applications Page



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

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

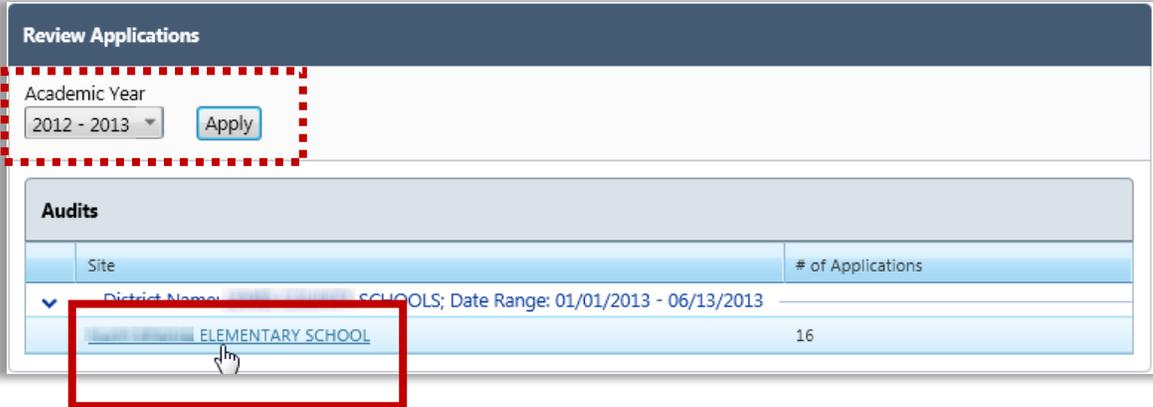
Page Functions

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

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.



Review Applications

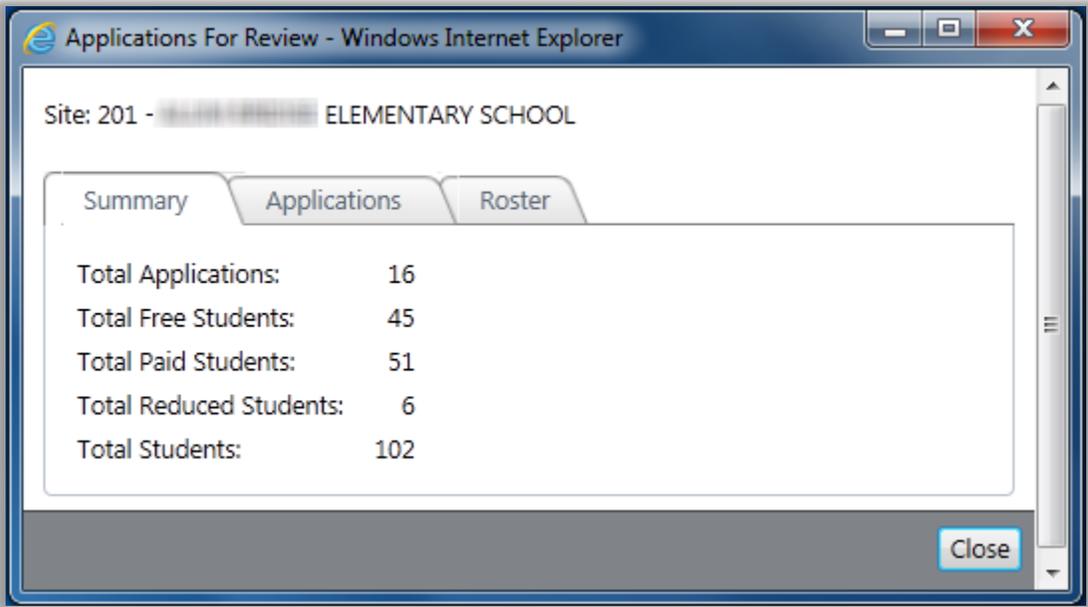
Academic Year
2012 - 2013 

Audits

Site	# of Applications
District Name: [REDACTED] SCHOOLS; Date Range: 01/01/2013 - 06/13/2013 [REDACTED] ELEMENTARY SCHOOL	16

Summary tab

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



Applications For Review - Windows Internet Explorer

Site: 201 - [REDACTED] ELEMENTARY SCHOOL

Summary Applications Roster

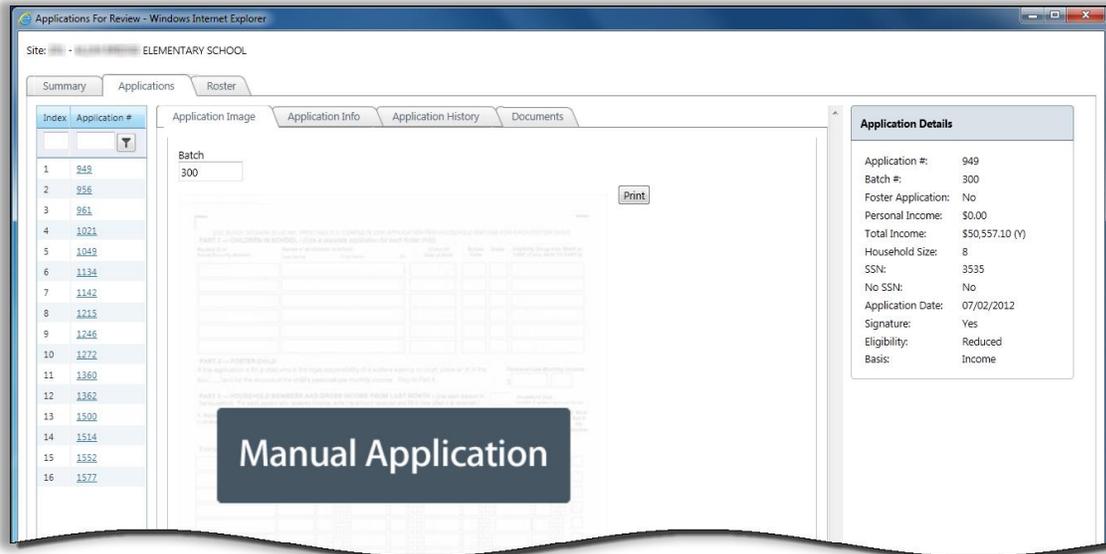
Total Applications:	16
Total Free Students:	45
Total Paid Students:	51
Total Reduced Students:	6
Total Students:	102

Close

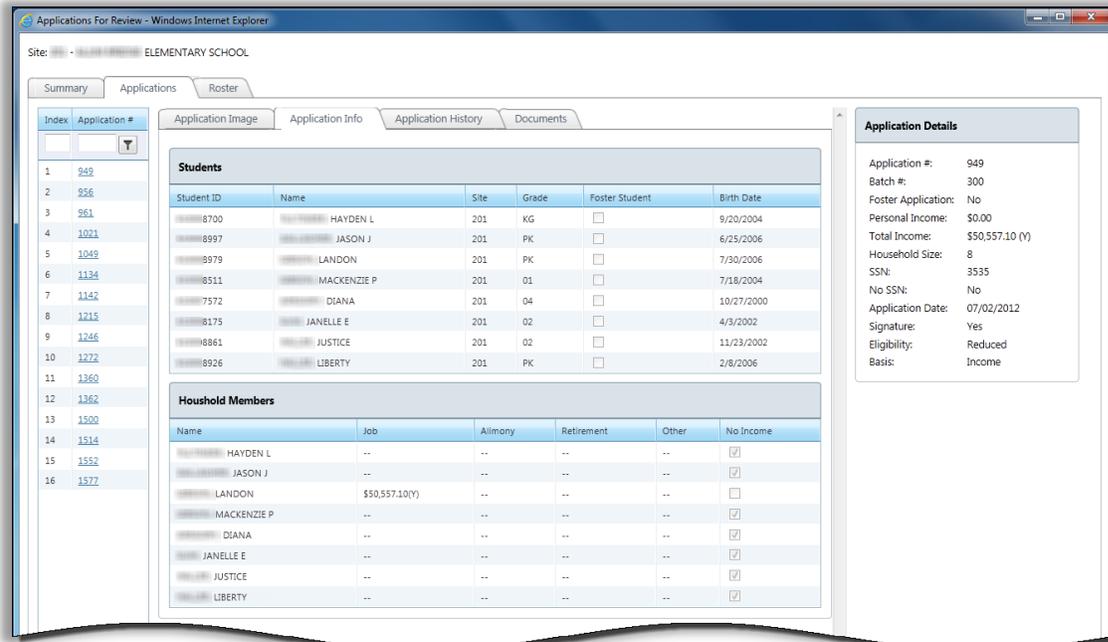
Applications tab

The **Applications** tab lists links to all applications and offers three sub-tabs of application information.

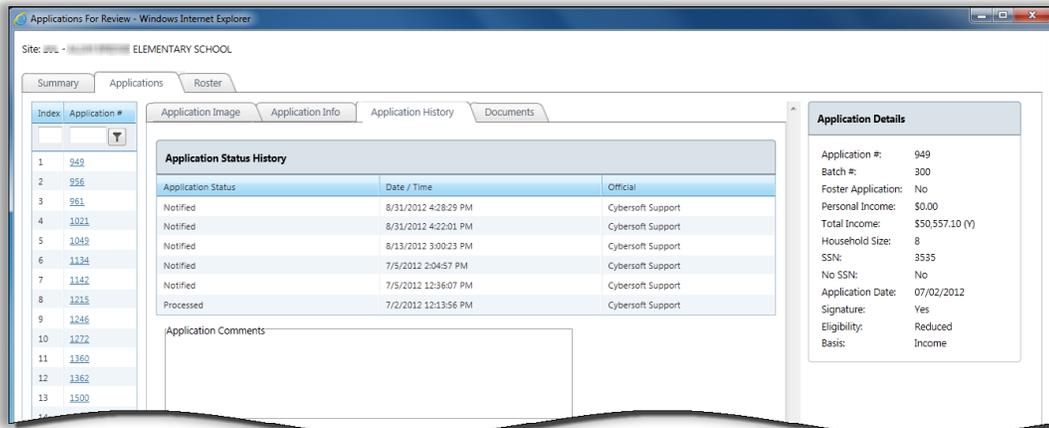
Application Image sub-tab— displays application images and lists application details.



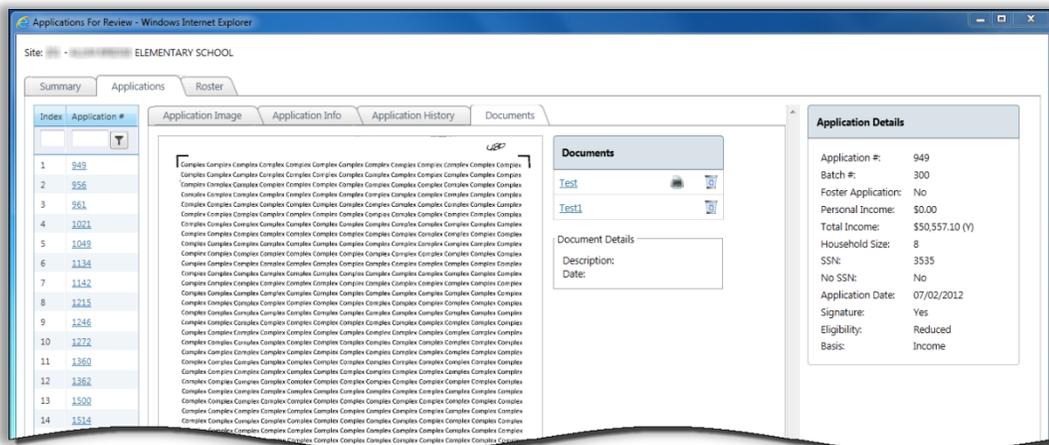
Application Info sub-tab—lists all students and household members on a selected application



Application History sub-tab— displays application status history and lists application details.

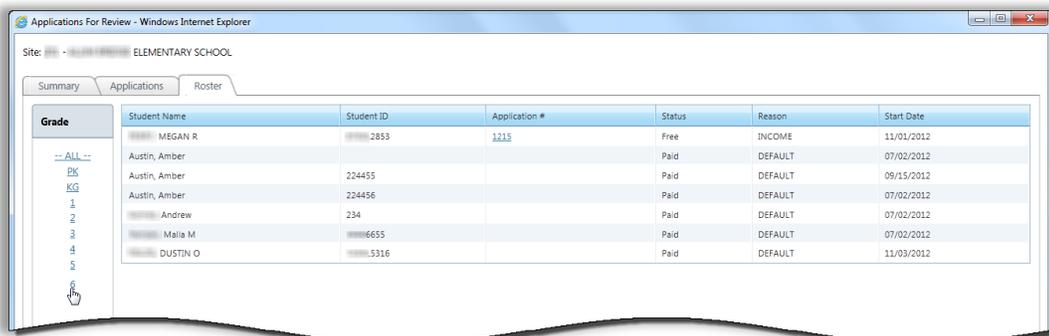


Documents sub-tab— displays scanned-document images and lists application details.



Roster-tab

The **Roster** tab displays a list of all students by grade whose application has been received for processing.



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.

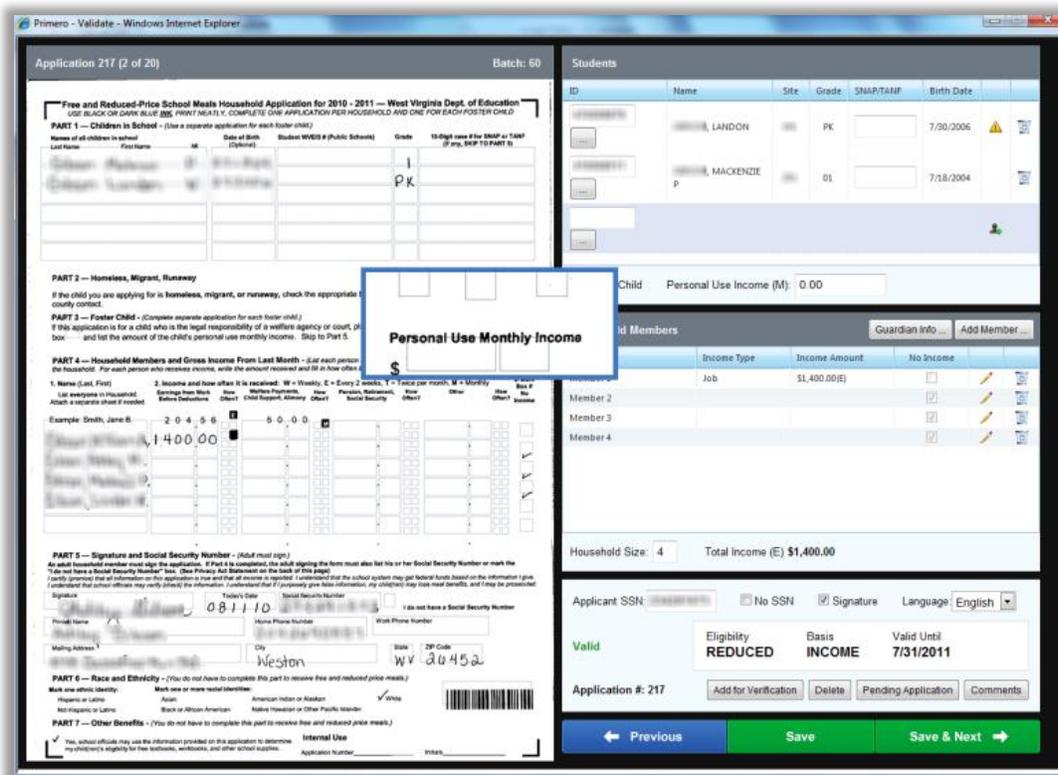
The following example is how to handle this situation in PrimeroEdge.

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  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.

Primero - View Application - Windows Internet Explorer

Validate View ...

Application Info Guardian Info History Extend/Refuse Image Documents Verification Info Verification Response

Verify Response Verification Result Summary

SNAP Household

SNAP Details

Confirmed SNAP/TANF #

Not Confirmed

Income Household

Income Details

Total Income (E) \$1,400.00 Household Size: 4

Household Members Add Member ...

Name	Income Type	Income Amount	No Income		
Member 1	Job	\$1,400.00(E)	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Member 2			<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Member 3			<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Member 4			<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>

Process & View Verification Result »

Primero - Confirmation

This will mark the verification for this application as complete. Do you wish to continue?

Yes No

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.

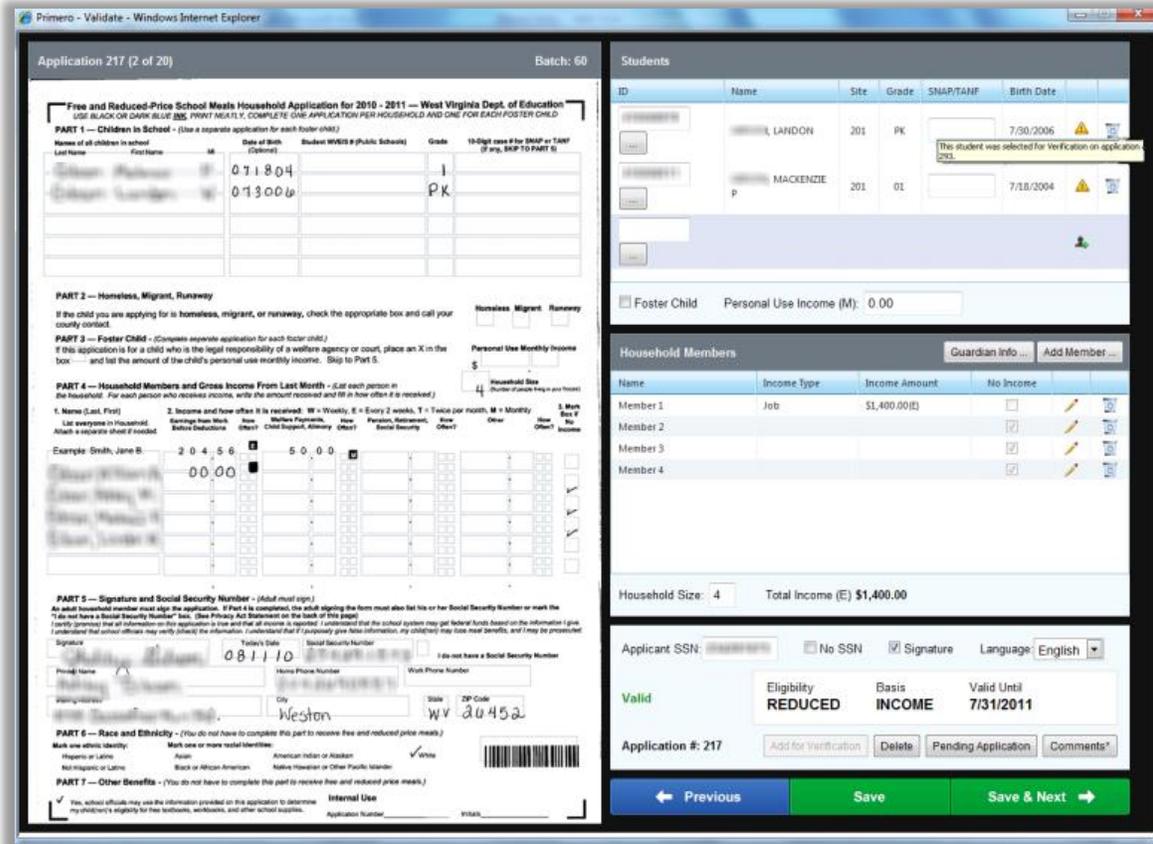


- Click  .

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

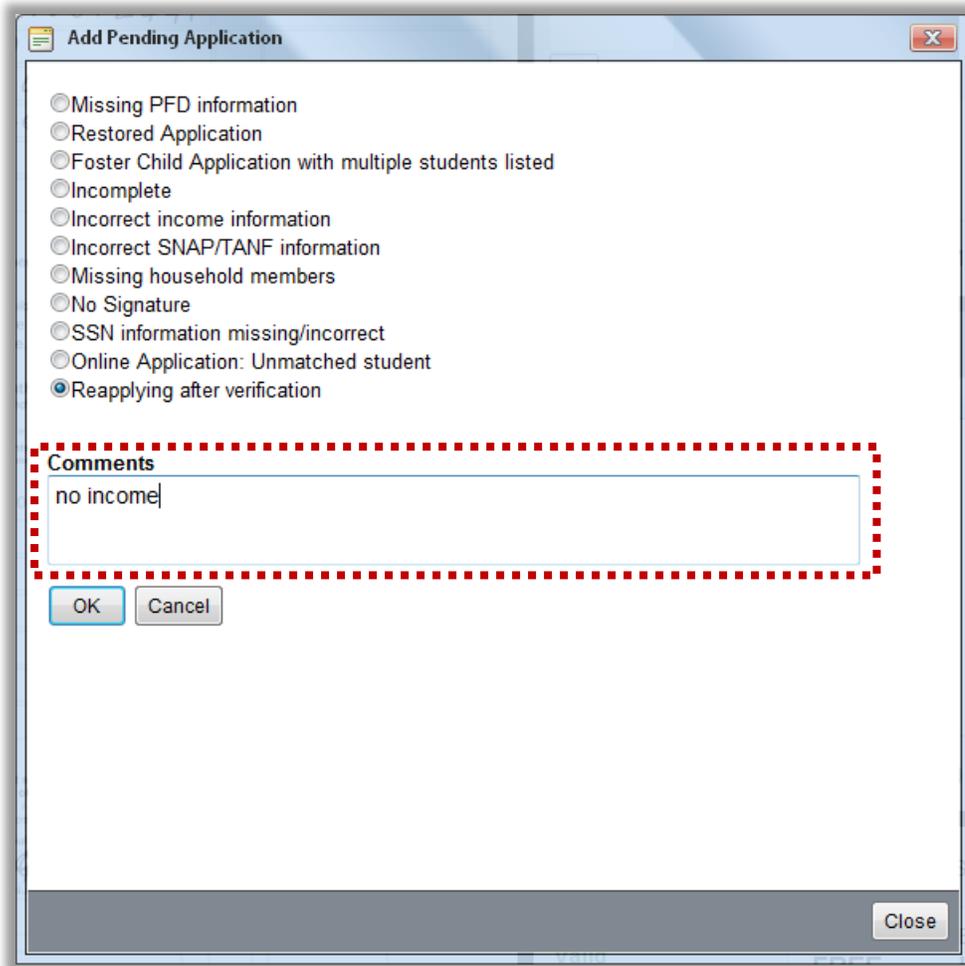
“This student was selected for verification on application ###”

is shown when the cursor hovers over the caution icon.



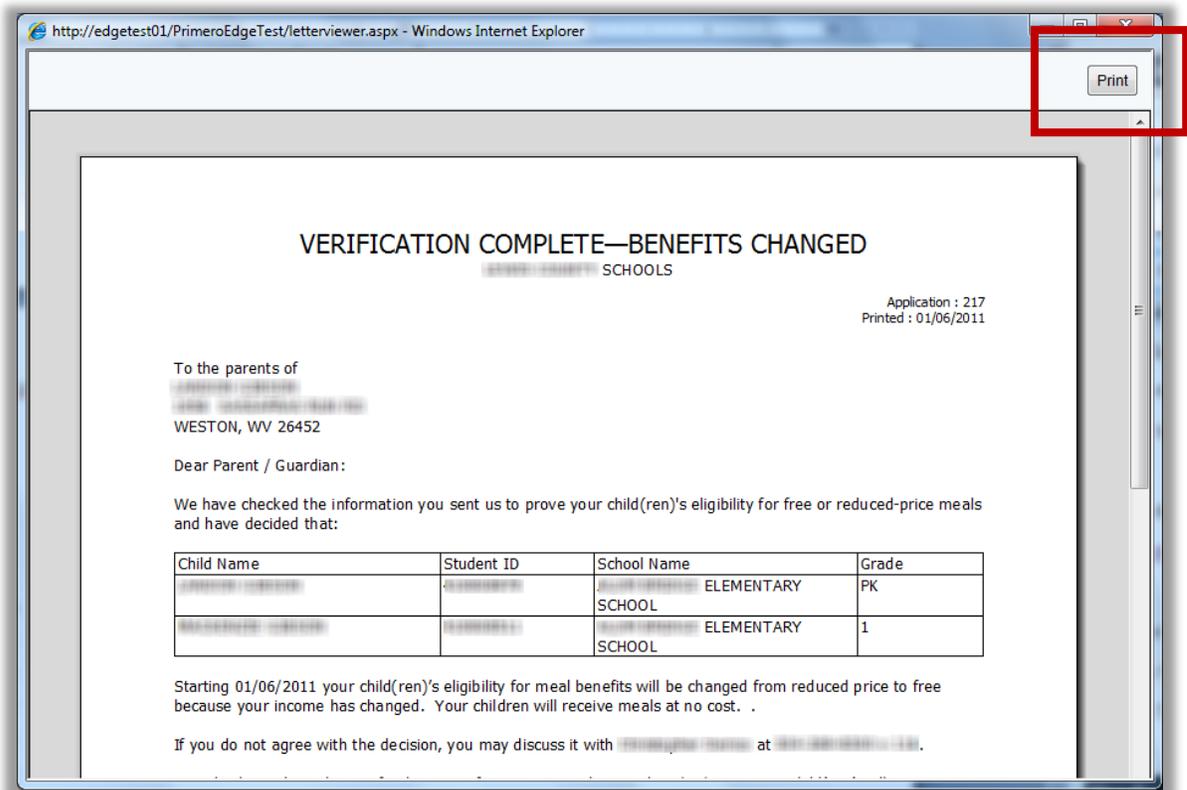
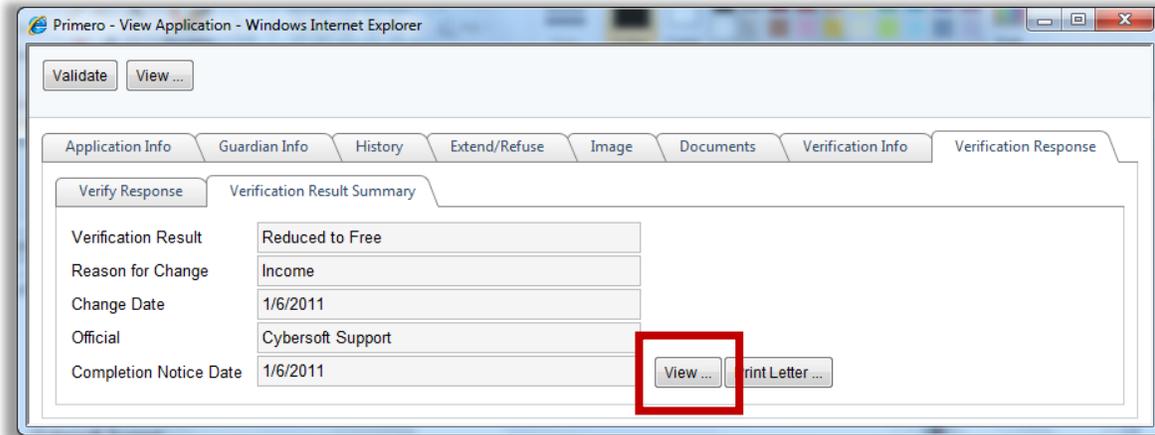
- * If Proof of Income *is provided*, the application is processed in the normal manner.
- * If Proof of Income *is not provided*, click **Pending Application** in the Validation Workspace.

- 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:

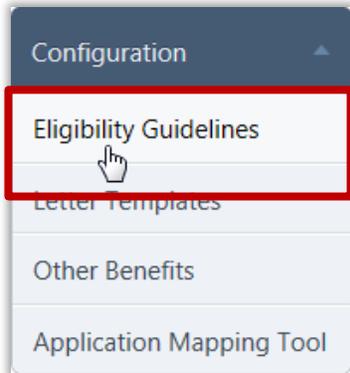
- ✓ Document eligibility for **Direct Approvals**.
- ✓ Extend benefits for Sibling Direct Approvals.
- ✓ Set and manage the **Grace Period**.
- ✓ Remind parents to reapply for benefits via **Grace Period Letters**.
- ✓ Generate Household Letters.
- ✓ View and update **Letter Templates**.
- ✓ View and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

The screenshot shows the 'Eligibility Guidelines' page. At the top, there are filters for 'Academic Year' (set to 2012 - 2013) and 'State Category' (set to Contiguous States), with an 'Apply' button. Below the filters, the page title is 'Eligibility Guidelines: 2012 - 2013 - Contiguous States', followed by 'Edit', 'Get Guidelines', and 'Generate Report' buttons. The main content is a table with columns for Household Size, Free Meals (Annual, Monthly, T-Month, E-2 Wks, Weekly), and Reduced Price Meals (Annual, Monthly, T-Month, E-2 Wks, Weekly). The table lists income limits for household sizes 1 through 8, and a row for '+1*' (Each Additional Member). At the bottom right, there are 'Cancel' and 'Save' buttons.

Household Size	Free Meals					Reduced Price Meals				
	Annual	Monthly	T-Month	E-2 Wks	Weekly	Annual	Monthly	T-Month	E-2 Wks	Weekly
1	\$14,521.00	\$1,211.00	\$606.00	\$559.00	\$280.00	\$20,665.00	\$1,723.00	\$862.00	\$795.00	\$398.00
2	\$19,669.00	\$1,640.00	\$820.00	\$757.00	\$379.00	\$27,991.00	\$2,333.00	\$1,167.00	\$1,077.00	\$539.00
3	\$24,817.00	\$2,069.00	\$1,035.00	\$955.00	\$478.00	\$35,317.00	\$2,944.00	\$1,472.00	\$1,359.00	\$680.00
4	\$29,965.00	\$2,498.00	\$1,249.00	\$1,153.00	\$577.00	\$42,643.00	\$3,554.00	\$1,777.00	\$1,641.00	\$821.00
5	\$35,113.00	\$2,927.00	\$1,464.00	\$1,351.00	\$676.00	\$49,969.00	\$4,165.00	\$2,083.00	\$1,922.00	\$961.00
6	\$40,261.00	\$3,356.00	\$1,678.00	\$1,549.00	\$775.00	\$57,295.00	\$4,775.00	\$2,388.00	\$2,204.00	\$1,102.00
7	\$45,409.00	\$3,758.00	\$1,893.00	\$1,747.00	\$874.00	\$64,621.00	\$5,386.00	\$2,693.00	\$2,486.00	\$1,243.00
8	\$50,557.00	\$4,214.00	\$2,107.00	\$1,945.00	\$973.00	\$71,947.00	\$5,996.00	\$2,998.00	\$2,768.00	\$1,384.00
+1*	\$5,148.00	\$429.00	\$215.00	\$198.00	\$99.00	\$7,326.00	\$611.00	\$306.00	\$282.00	\$141.00

* = Each Additional Member

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

- **Academic Year** is set to the current school year.
- **State Category** is set to “Contiguous States”.

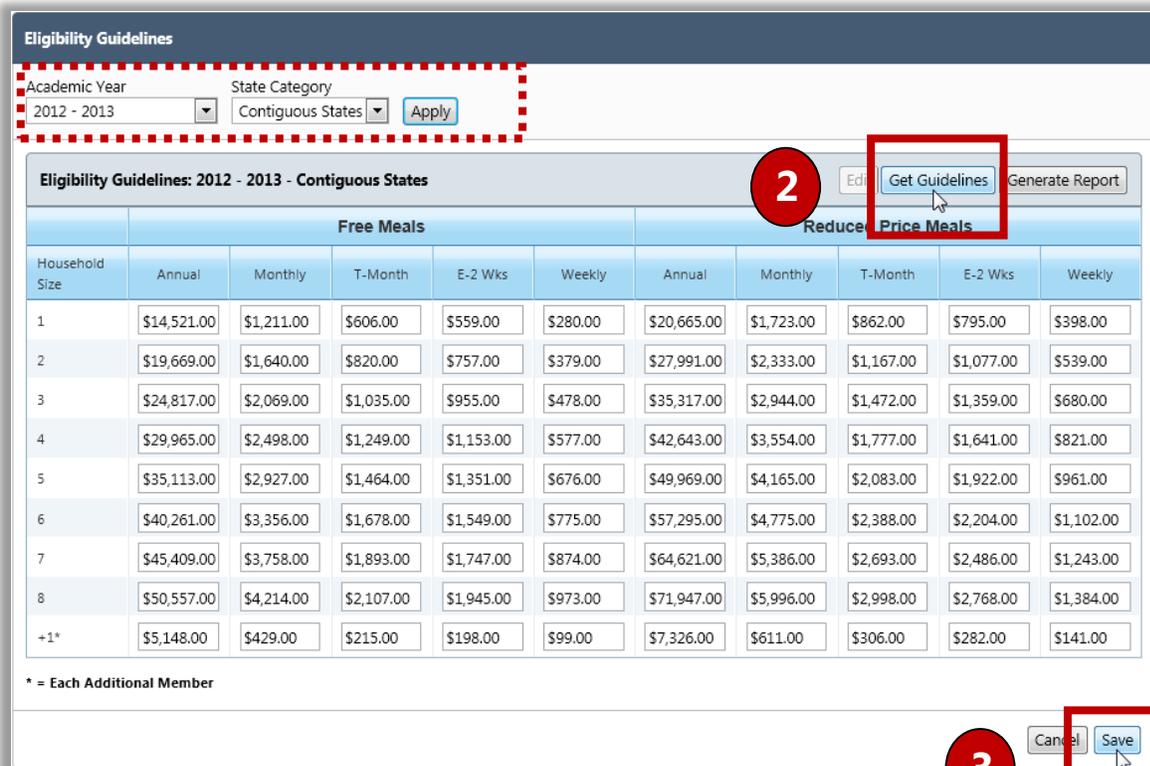
Page Functions

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  .



Eligibility Guidelines

Academic Year: 2012 - 2013 | State Category: Contiguous States | 

Eligibility Guidelines: 2012 - 2013 - 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	\$14,521.00	\$1,211.00	\$606.00	\$559.00	\$280.00	\$20,665.00	\$1,723.00	\$862.00	\$795.00	\$398.00
2	\$19,669.00	\$1,640.00	\$820.00	\$757.00	\$379.00	\$27,991.00	\$2,333.00	\$1,167.00	\$1,077.00	\$539.00
3	\$24,817.00	\$2,069.00	\$1,035.00	\$955.00	\$478.00	\$35,317.00	\$2,944.00	\$1,472.00	\$1,359.00	\$680.00
4	\$29,965.00	\$2,498.00	\$1,249.00	\$1,153.00	\$577.00	\$42,643.00	\$3,554.00	\$1,777.00	\$1,641.00	\$821.00
5	\$35,113.00	\$2,927.00	\$1,464.00	\$1,351.00	\$676.00	\$49,969.00	\$4,165.00	\$2,083.00	\$1,922.00	\$961.00
6	\$40,261.00	\$3,356.00	\$1,678.00	\$1,549.00	\$775.00	\$57,295.00	\$4,775.00	\$2,388.00	\$2,204.00	\$1,102.00
7	\$45,409.00	\$3,758.00	\$1,893.00	\$1,747.00	\$874.00	\$64,621.00	\$5,386.00	\$2,693.00	\$2,486.00	\$1,243.00
8	\$50,557.00	\$4,214.00	\$2,107.00	\$1,945.00	\$973.00	\$71,947.00	\$5,996.00	\$2,998.00	\$2,768.00	\$1,384.00
+1*	\$5,148.00	\$429.00	\$215.00	\$198.00	\$99.00	\$7,326.00	\$611.00	\$306.00	\$282.00	\$141.00

* = Each Additional Member

To edit income guidelines

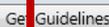
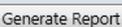
1. Select an **Academic Year** and a **State Category**, if needed click .
2. Click .
3. Enter new income values for **Free Meals** or **Reduced Price Meals** as needed.
4. Click .

1

Eligibility Guidelines

Academic Year: 2012 - 2013 State Category: Contiguous States 

2

Eligibility Guidelines: 2012 - 2013 - 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	\$14,521.0	\$1,211.00	\$606.00	\$559.00	\$280.00	\$20,665.0	\$1,723.00	\$862.00	\$795.00	\$398.00
2	\$19,669.0	\$1,640.00	\$820.00	\$757.00	\$379.00	\$27,991.0	\$2,333.00	\$1,167.00	\$1,077.00	\$539.00
3	\$24,817.0	\$2,069.00	\$1,035.00	\$955.00	\$478.00	\$35,317.0	\$2,944.00	\$1,472.00	\$1,359.00	\$680.00
4	\$29,965.0	\$2,498.00	\$1,249.00	\$1,153.00	\$577.00	\$42,643.0	\$3,554.00	\$1,777.00	\$1,641.00	\$821.00
5	\$35,113.0	\$2,927.00	\$1,464.00	\$1,351.00	\$676.00	\$49,969.0	\$4,165.00	\$2,083.00	\$1,922.00	\$961.00
6	\$40,261.0	\$3,356.00	\$1,678.00	\$1,549.00	800	\$57,295.0	\$4,775.00	\$2,388.00	\$2,204.00	\$1,102.00
7	\$45,409.0	\$3,758.00	\$1,893.00	\$1,747.00	\$874.00	\$64,621.0	\$5,386.00	\$2,693.00	\$2,486.00	\$1,243.00
8	\$50,557.0	\$4,214.00	\$2,107.00	\$1,945.00	\$973.00	\$71,947.0	\$5,996.00	\$2,998.00	\$2,768.00	\$1,384.00
+1*	\$5,148.00	\$429.00	\$215.00	\$198.00	\$99.00	\$7,326.00	\$611.00	\$306.00	\$282.00	\$141.00

* = Each Additional Member

3

4

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



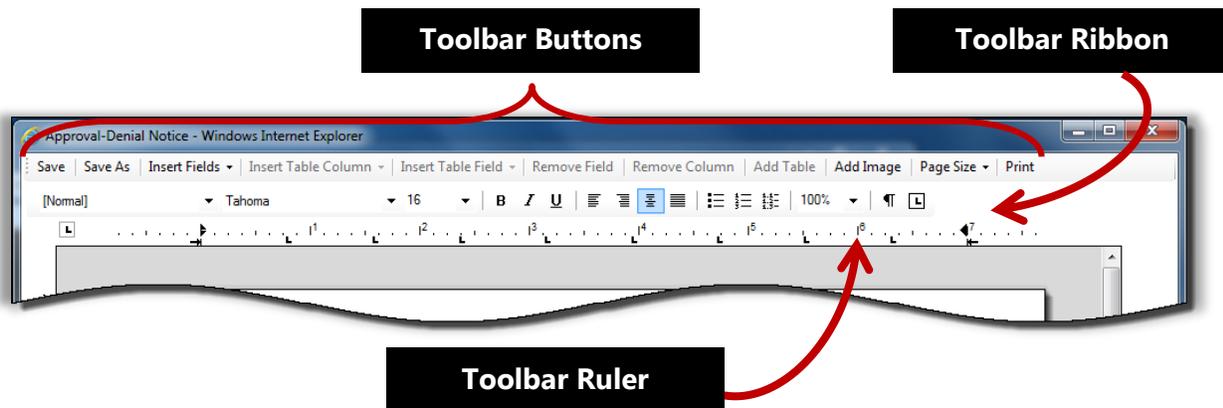
By default on the **Letter Templates** page:

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

Page Functions

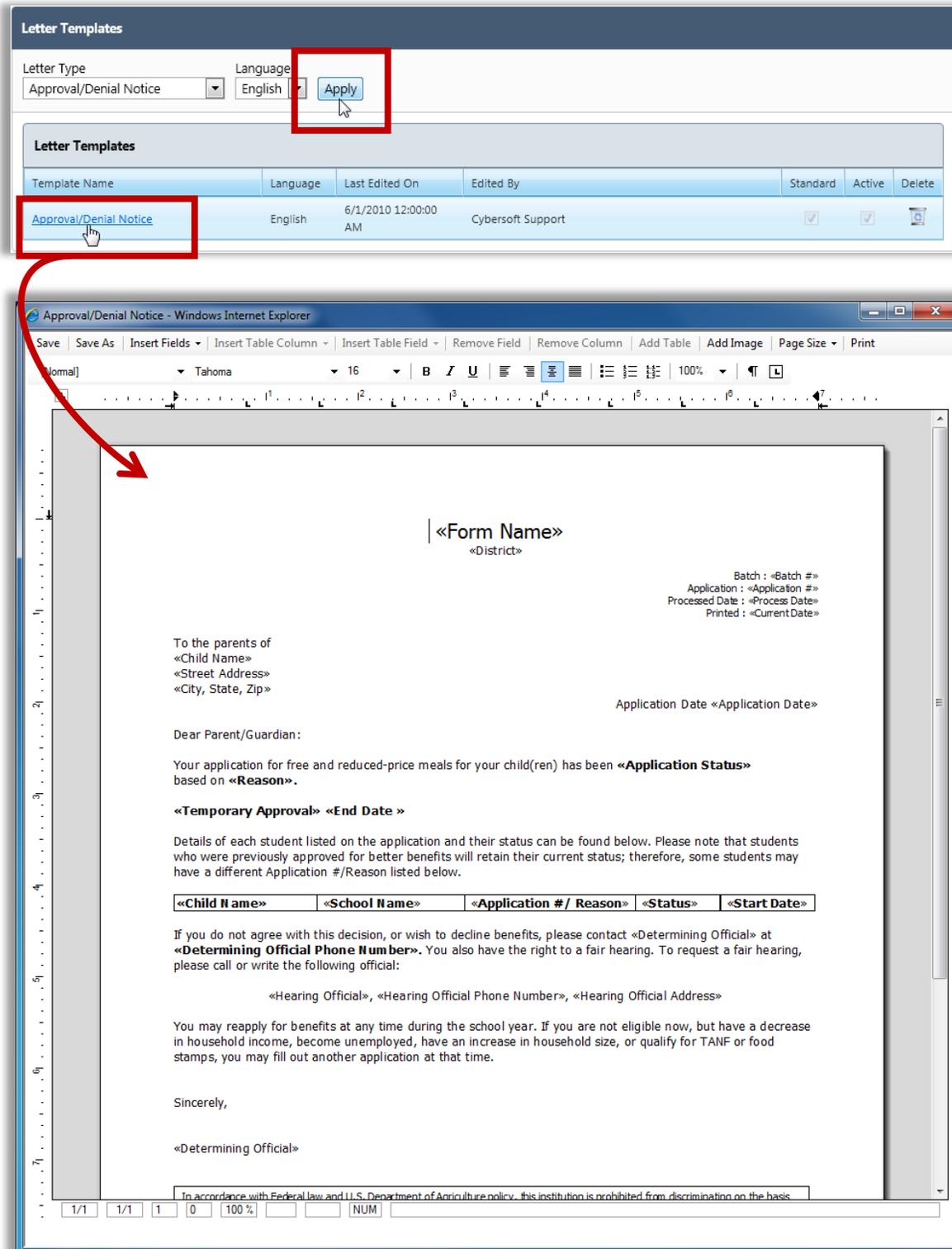
Button	Description
	Click to display a list of letter templates that match the selected conditions.

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. The 'Letter Type' is set to 'Approval/Denial Notice' and the 'Language' is set to 'English'. The 'Apply' button is highlighted with a red box. Below this, a table lists the templates, with 'Approval/Denial Notice' highlighted by a red box and a red arrow pointing to the preview window below.

The preview window shows the letter template 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»

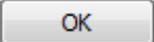
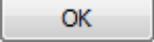
You may reapply for benefits at any time during the school year. If you are not eligible now, but have a decrease in household income, become unemployed, have an increase in household size, or qualify for TANF or food stamps, you may fill out another application at that time.

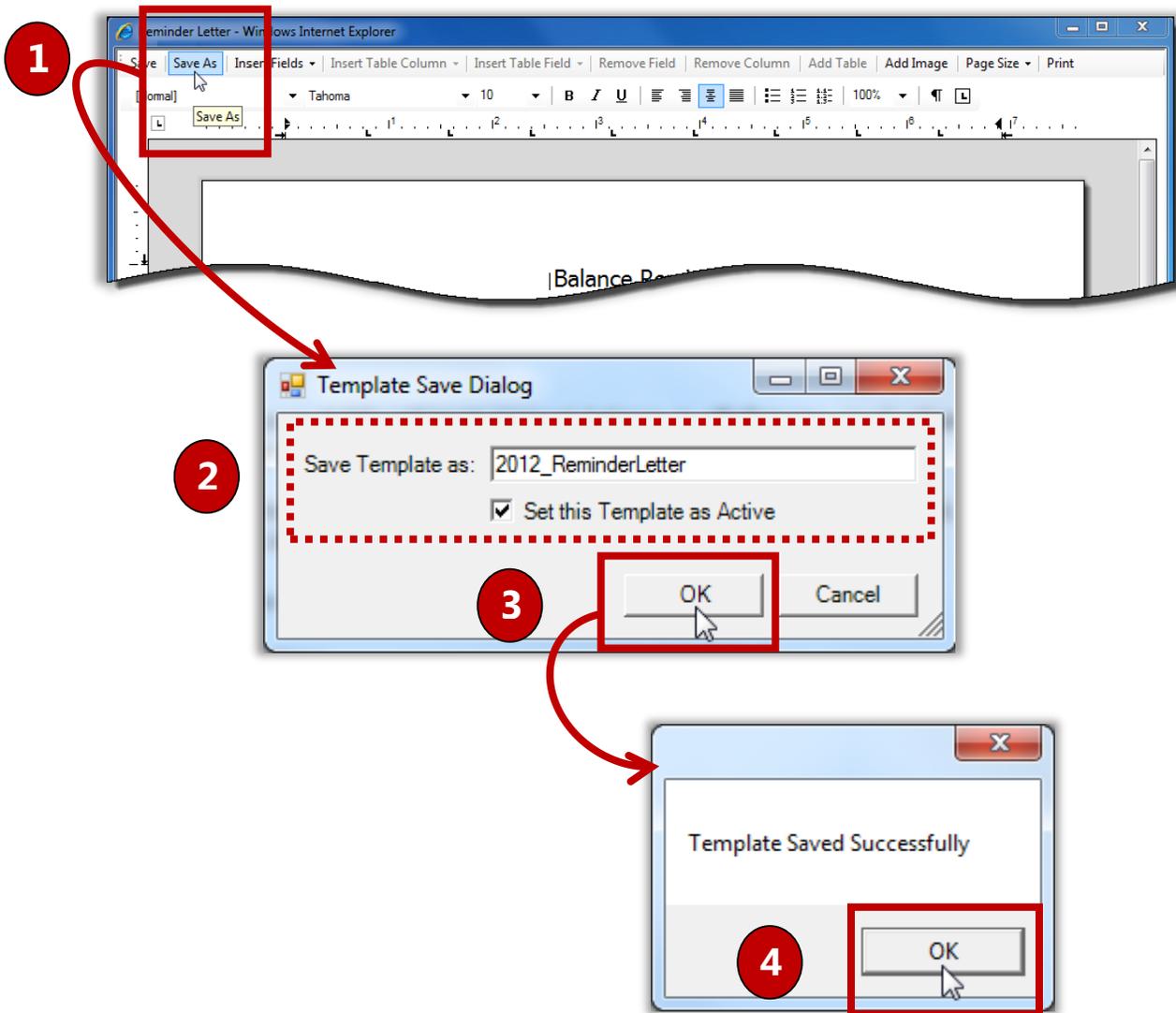
Sincerely,

«Determining Official»

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

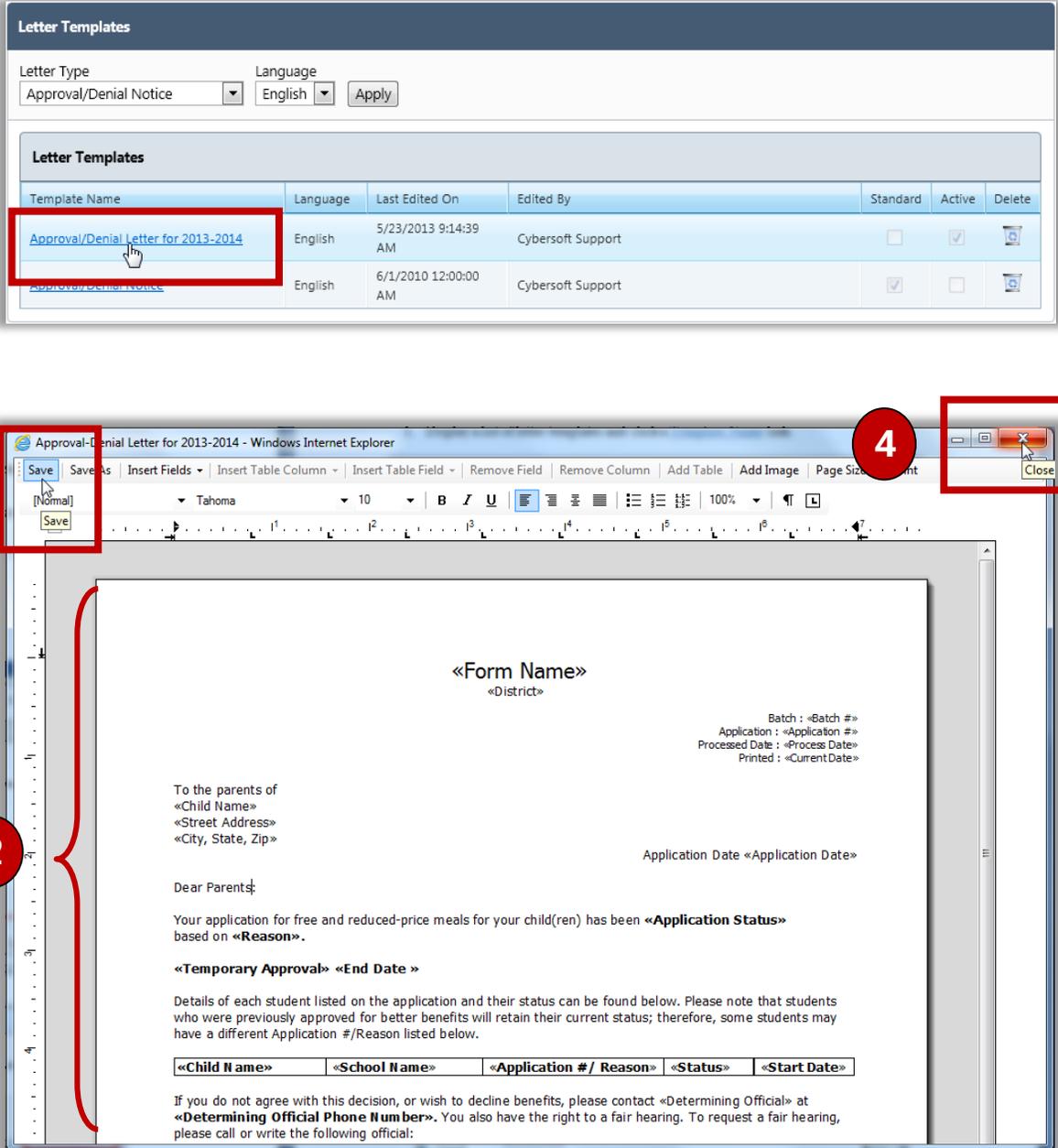
To add a custom template letter:

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 screenshot is divided into two parts. The top part shows the 'Letter Templates' management interface, and the bottom part shows the 'Approval-Denial Letter for 2013-2014' template editor in a web browser.

Letter Templates Interface:

Letter Type: Approval/Denial Notice | Language: English | Apply

Template Name	Language	Last Edited On	Edited By	Standard	Active	Delete
Approval/Denial Letter for 2013-2014	English	5/23/2013 9:14:39 AM	Cybersoft Support	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Approval-Denial Notice	English	6/1/2010 12:00:00 AM	Cybersoft Support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Letter Template Editor:

Approval-Denial Letter for 2013-2014 - Windows Internet Explorer

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.

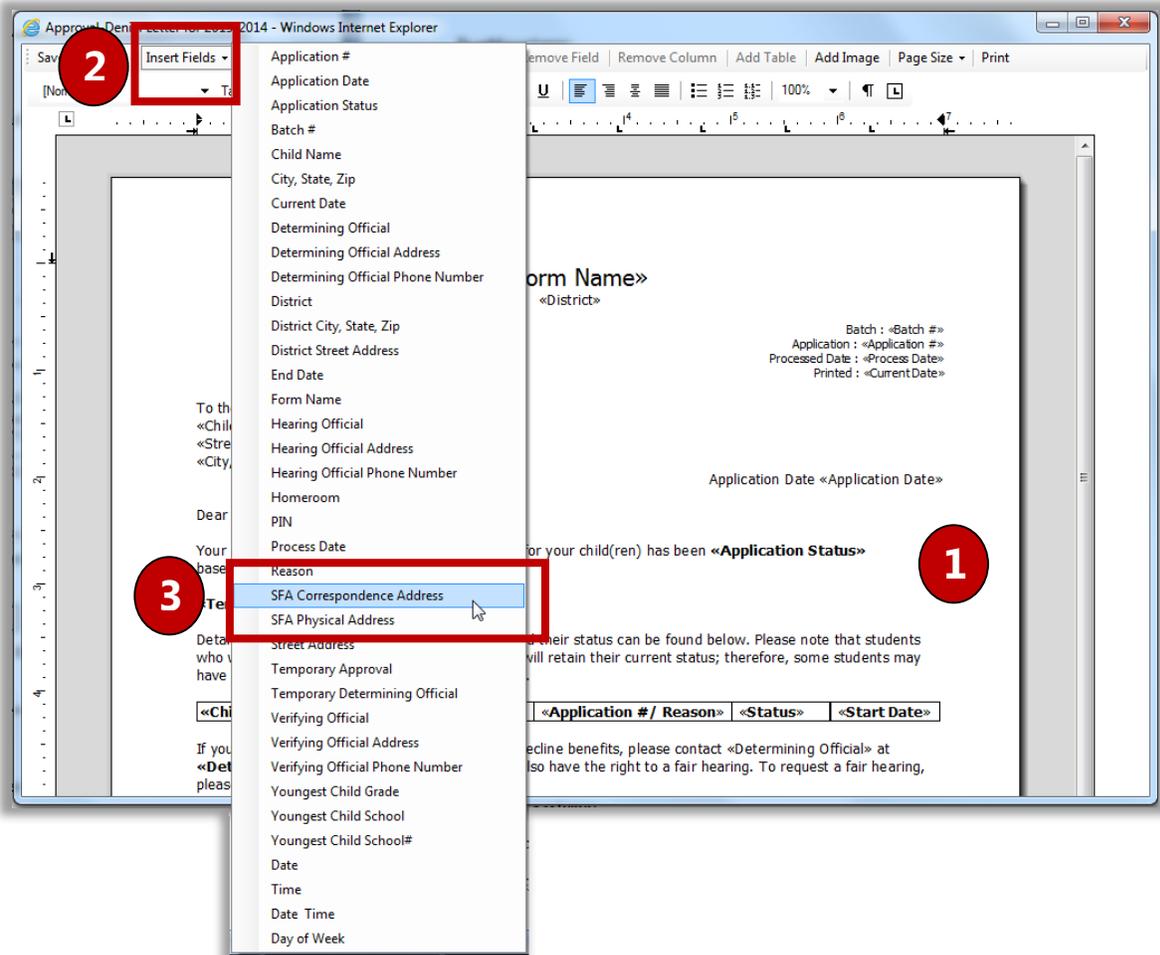
«Child Name»	«School Name»	«Application #/ Reason»	«Status»	«Start Date»

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:

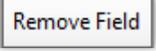
Working With Data Fields

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.

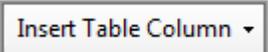
Working with Tables

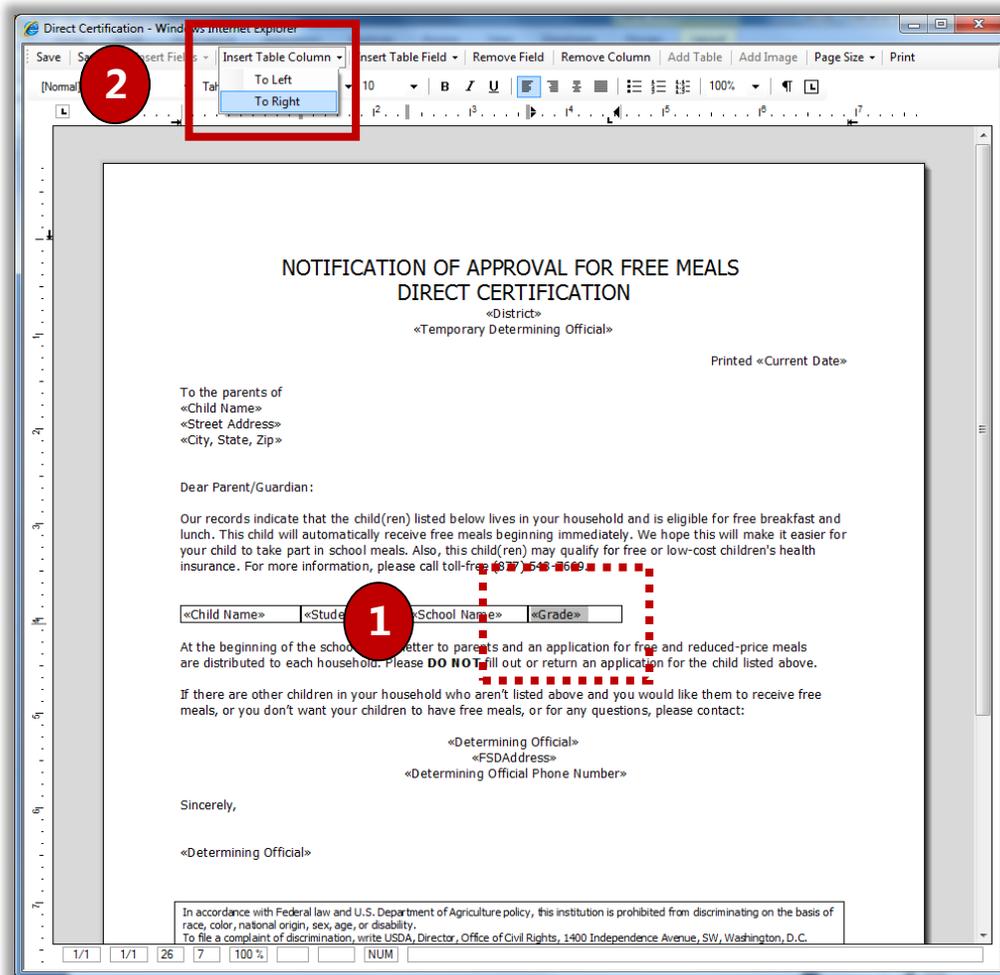
Table use guidelines include:

- 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.



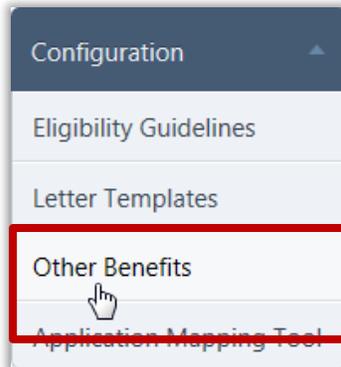
To add a table field to a column:

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

FREE & REDUCED MEALS

Review Application FAQ's

Instructions
Please review your application and change any information that is not correct. Your application is NOT complete – you must click "Next" to continue to the final step.

Student(s) on Application Edit

Name	Birth Date	School	Grade	Income	Foster Child
Adams, Jasmine	04/21/2007	SOUTHSIDE ELEMENTARY	KG	No	No
Adams, William	02/19/2003	SOUTHSIDE ELEMENTARY	02	No	No
Greene, Terence	03/21/2005	SOUTHSIDE ELEMENTARY	01	No	Yes

Other Benefits
(You do not have to complete this part to receive free or reduced priced meals.)

School Year Book
 Health Care Plan
 Band Uniform

The information you give on your Free and Reduced Price School Meal Application may be shared with other programs for which your children may qualify. Your response will not impact your eligibility determination. If you do not want the information shared, please indicate by marking the following.

No I **DO NOT** want information from my Free and Reduced Price Meals Application shared with any other programs.

Previous Next

To add a new benefit

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

Other Benefits Refresh

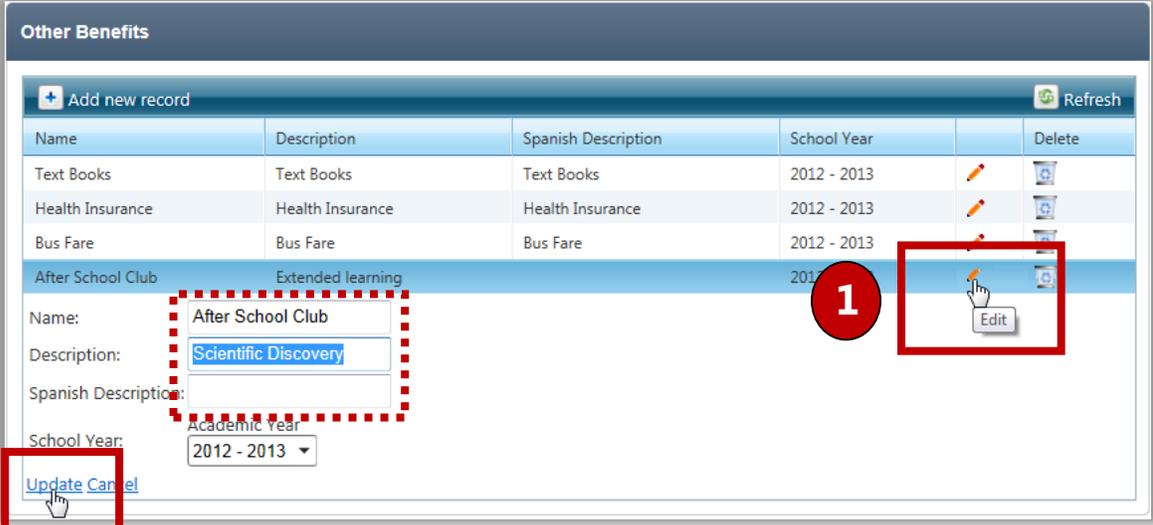


Name	Description	Spanish Description	School Year	Delete
Name: After School Club	Description: Extended Learning		Academic Year: 2012 - 2013	
Text Books			2012 - 2013	
Health Insurance			2012 - 2013	
Bus Fare			2012 - 2013	

[Insert](#) [Cancel](#)

To change an existing 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 its details are shown in a form below. The 'Edit' button is circled with a red box and a '1' in a red circle. The 'Update' button is circled with a red box and a '3' in a red circle. The 'Description' field is highlighted with a red dashed box and a '2' in a red circle.

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		

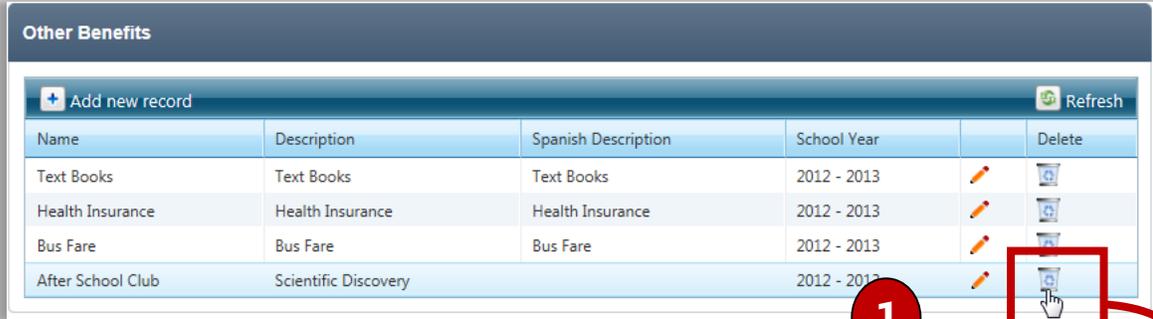
Form fields for 'After School Club':

- Name: After School Club
- Description: Scientific Discovery
- Spanish Description:
- School Year: 2012 - 2013

Buttons: Update, Cancel

To delete a benefit

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



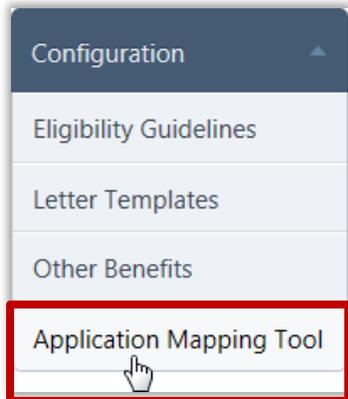
The screenshot shows the 'Other Benefits' interface. A table lists benefits: Text Books, Health Insurance, Bus Fare, and After School Club. The 'After School Club' row is selected, and its details are shown in a form below. The 'Delete' button is circled with a red box and a '1' in a red circle.

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 popup: "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.

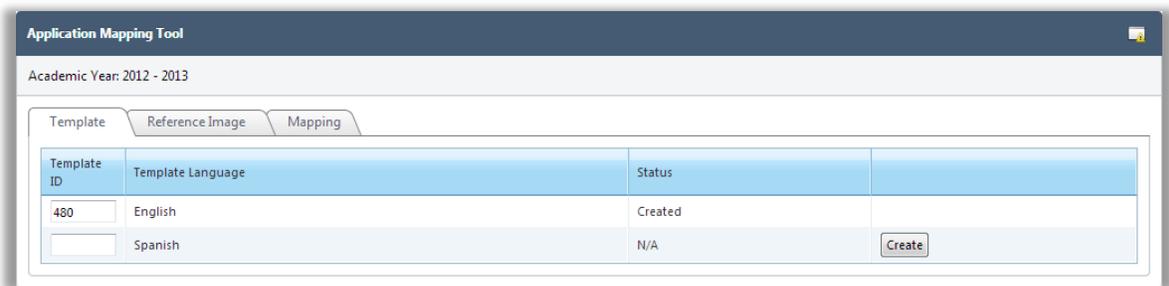
The **Application Mapping Tool** page includes three tabs:

- **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

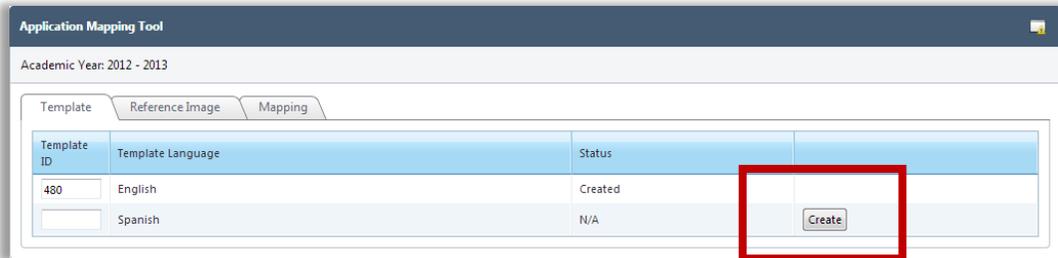
Button	Description
<input type="button" value="Create"/>	Click to create a template of the last scanned application.

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 create a template

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



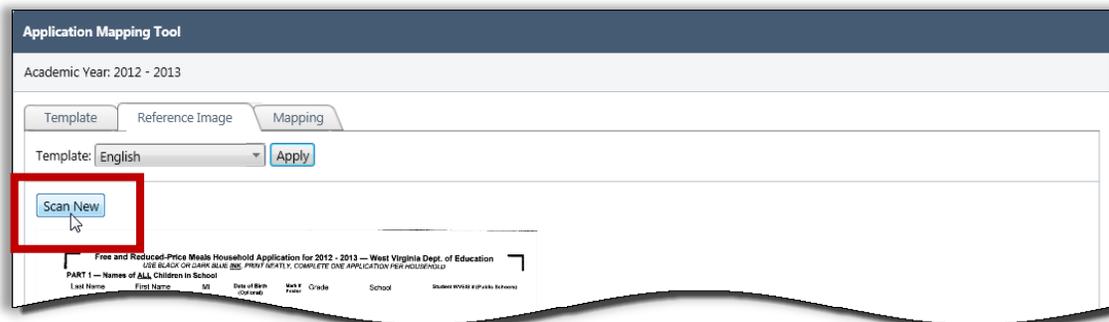
Tab 2: Reference Image

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.

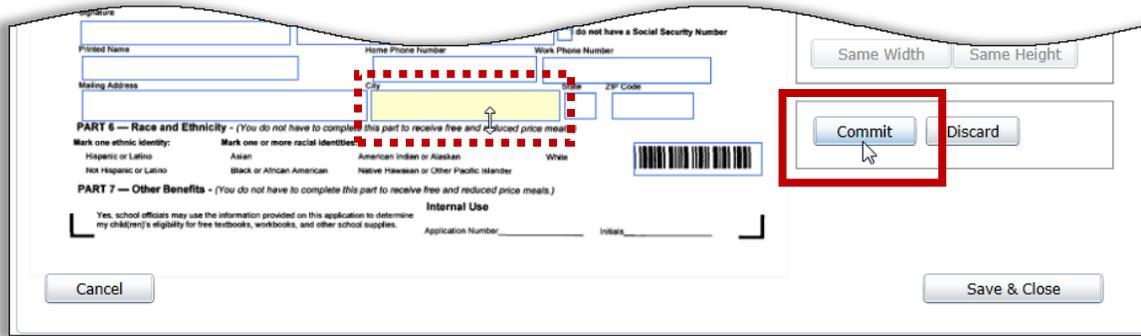
Group Tools modify two or more selected map boxes

Click to save your last set of changes

Click to cancel your last set of changes

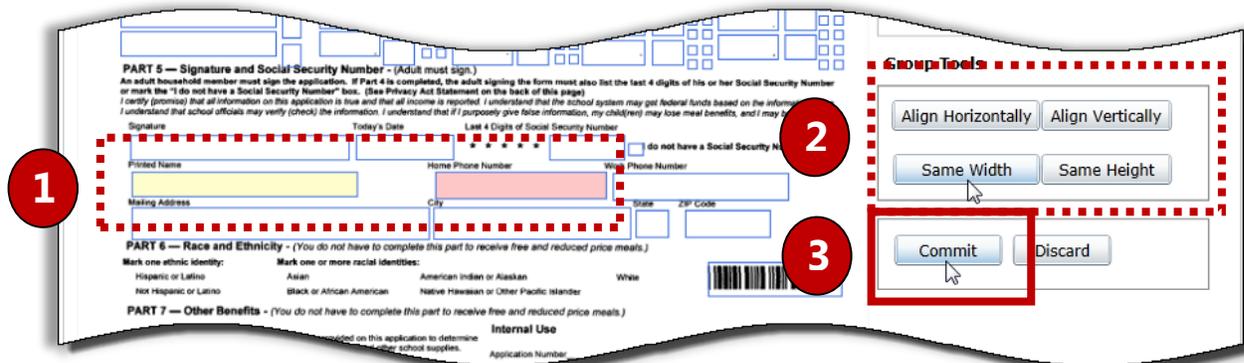
To increase or decrease the size of the mapped box

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.

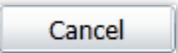


To work with Group Tools

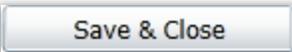
1. Select two or more boxes with the mouse while holding down the Ctrl key.
2. Click a group tool to change the size or vertical/horizontal location of all mapped boxes **relative to the first selected box**.
3. Commit or Discard your changes.



To discard all changes and close the mapped image

- Click  .

To save all changes and close the mapped image

- Click  .