Instructions for Accessing
Direct Certification Data for the
Matching Process

Thank you for participating in the Online Direct Certification Matching Process (DCMP). This process helps facilitate the receipt of school meals at no cost to children enrolled in the Supplemental Nutrition Assistance Program (SNAP) and/or Temporary Assistance for Needy Families (TANF). The New York State Education Department (NYSED) will continue to use the letter method (as a secondary method/categorical eligibility) to ensure all eligible children are reached. The NYSED Child Nutrition Program will provide updated Direct Certification Data (DCD) in July, October, January and April during the school year. **All matches (July, October, and January) with the DCMP should be completed as soon as possible after the data has been made available. The July match should be completed no later than August 31. The October match should be completed no later than November 30. The January match should be completed no later than February 28. It is recommended to access the additional data provided in April, which is beneficial for LEAs planning to participate in the Community Eligibility Provision (CEP).**

The DCD contains confidential SNAP information. The DCD includes: case number, case name/guardian, student's (first, middle initial, last) name, date of birth, age, address (street, city, state, zip), and Assistance Program. DCMP users are required to certify that information remains confidential in compliance with the disclosure statement provided. Do not provide the direct certification data to anyone unauthorized to perform the match. If a company is providing tools (software programs) to help facilitate the DCMP, the company should not have access to the direct certification data (DCD). Software companies and their IT staff should only provide the tools and assistance for utilizing the tools the company is providing to your district/school. Software must be able to identify which Assistance Program (i.e. SNAP or Medicaid) the child's household participates in which has made them eligible through the Direct Certification Matching Process. For the 2014-15 SY only, the Medicaid directly certified students can be coded in the "other" category as long as they can be discretely identified for FNS-742 Verification Summary reporting purposes.

The following instructions explain how to access the DCD. Each school will be responsible for accessing the DCD directly from the Child Nutrition Knowledge Center (CNKC) website, by logging into the Child Nutrition Management System (CNMS). Schools will retrieve the DCD list by selecting zip codes within their district/school. If students attend your school district from a neighboring school district, you may select the zip codes from the neighboring school district. Districts/schools should keep a list of zip codes that were used to obtain the data and a copy of the data obtained with their National School Lunch Program (NSLP) records. The district/school must record the date the data was obtained. Certifications are not retroactive. Therefore, it is important to conduct the DCMP as close to the beginning of the school year as possible so that eligible students will receive benefits in a timely manner. NYSED will maintain a record of the districts/schools that have accessed the data.

Schools assume more responsibility for the matching process. Districts/schools with electronic enrollment records or point of sale (POS) systems should contact all applicable information technology (IT) staff to determine how to utilize the DCD effectively. Some companies provide school food management tools (software) that facilitate the DCMP. Name, date of birth, and address will be used as unique identifiers to match the data, provided on the CNMS, to school enrollment records. Schools will need to carefully review the data to ensure they capture children whose names are spelled differently, have moved, or use different names such as Robert, Bob, Robbie, Rob, etc. or have siblings in the household with different last names. **Additional instructions have been provided for manually matching enrollment records to the direct certification data retrieved from the CNMS.**

Schools are responsible for sending a DCMP notification letter to households of directly certified students, to notify families of their children's free eligibility status. A prototype letter is provided to ensure standardization and to simplify this requirement for schools to notify student's families of their new eligibility status. **Once a student has been identified (matched) to be eligible through this process, they retain their eligibility for the entire school year. For the second, third and fourth matches (October, January, April), schools/districts will not have to send DCMP notification letters to families that were previously matched in the July match.**

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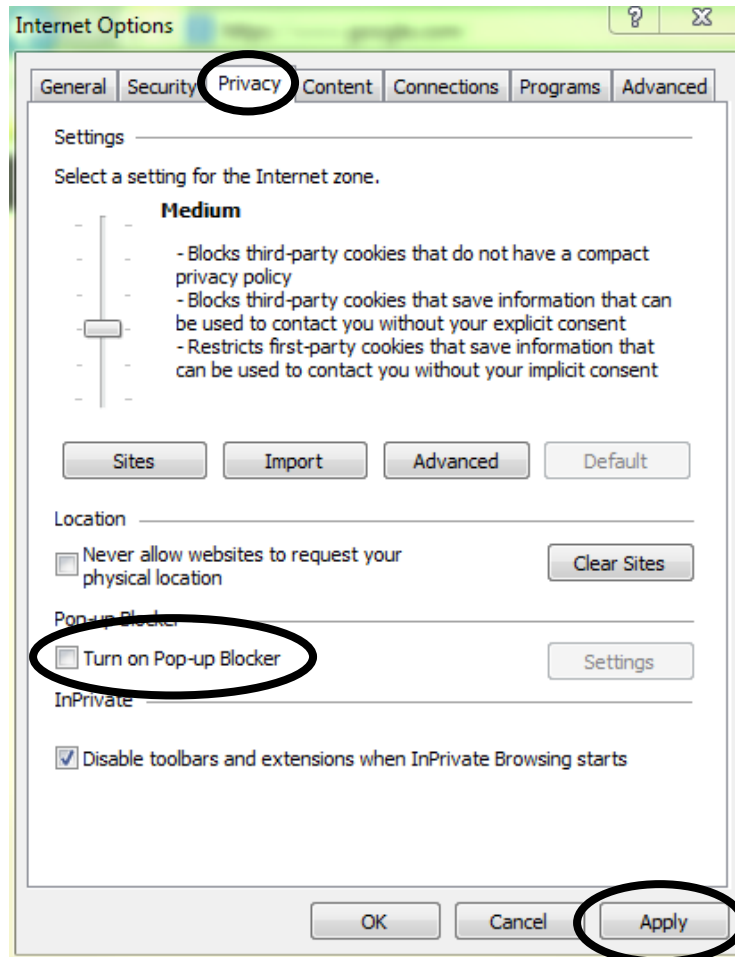**Direct Certification Data for the**
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Updated Database: CNMS passwords will have to be changed if they do not meet the following criteria or if you are denied access to the Discoverer database. Passwords are case sensitive, must be at least 8-12 characters, begin with a letter, and contain at least 1 number.

1.   Prior to starting the process open your web browser (i.e. internet explorer). Select *Tools Icon*, then select "**Internet Options**."
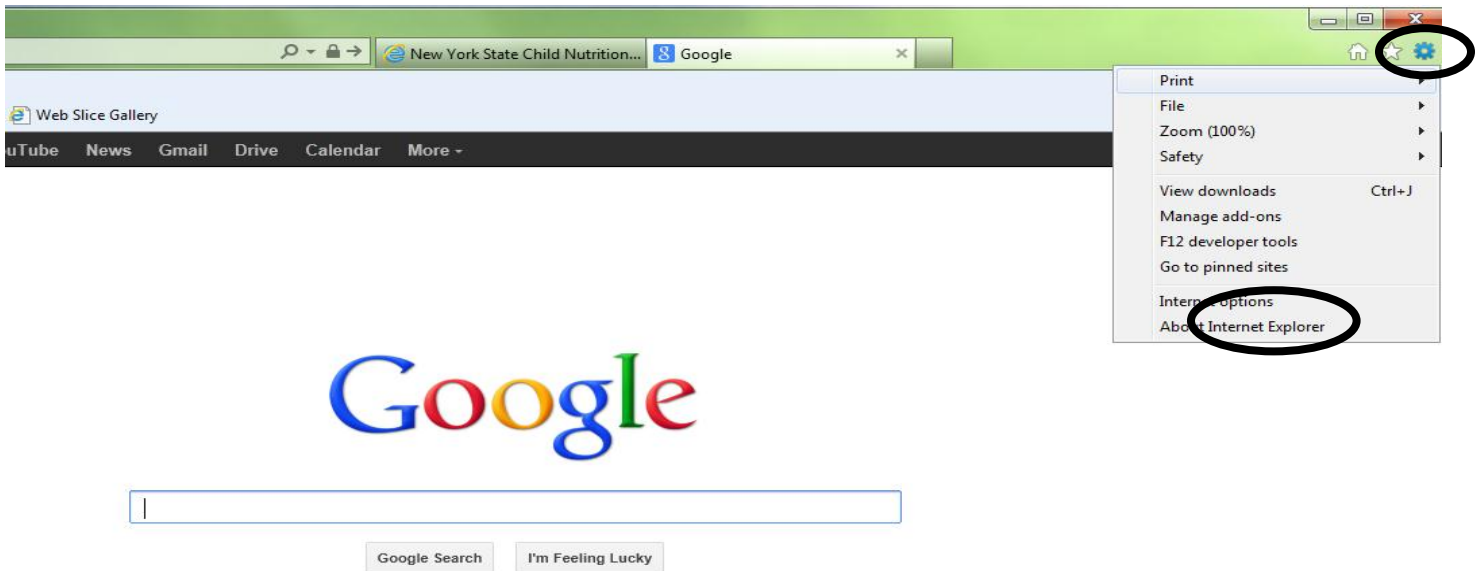
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2. Select the tab "**Privacy**" and uncheck the box "**Turn on Pop-up Blocker**" and click "**Apply**", EXIT out of the web browser by clicking the red X in the upper right hand corner of the screen. Now you can re-open your web browser and begin the process.

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3. Go to the Child Nutrition Knowledge Center website: portal.nysed.gov then click on the Child Nutrition Knowledge Center (CN).

4. Log into the Child Nutrition Management System by clicking the CNMS icon, and enter your User Name and Password.

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5.   Once you are logged into the CNMS, click: **Reports   →   Direct Certification**
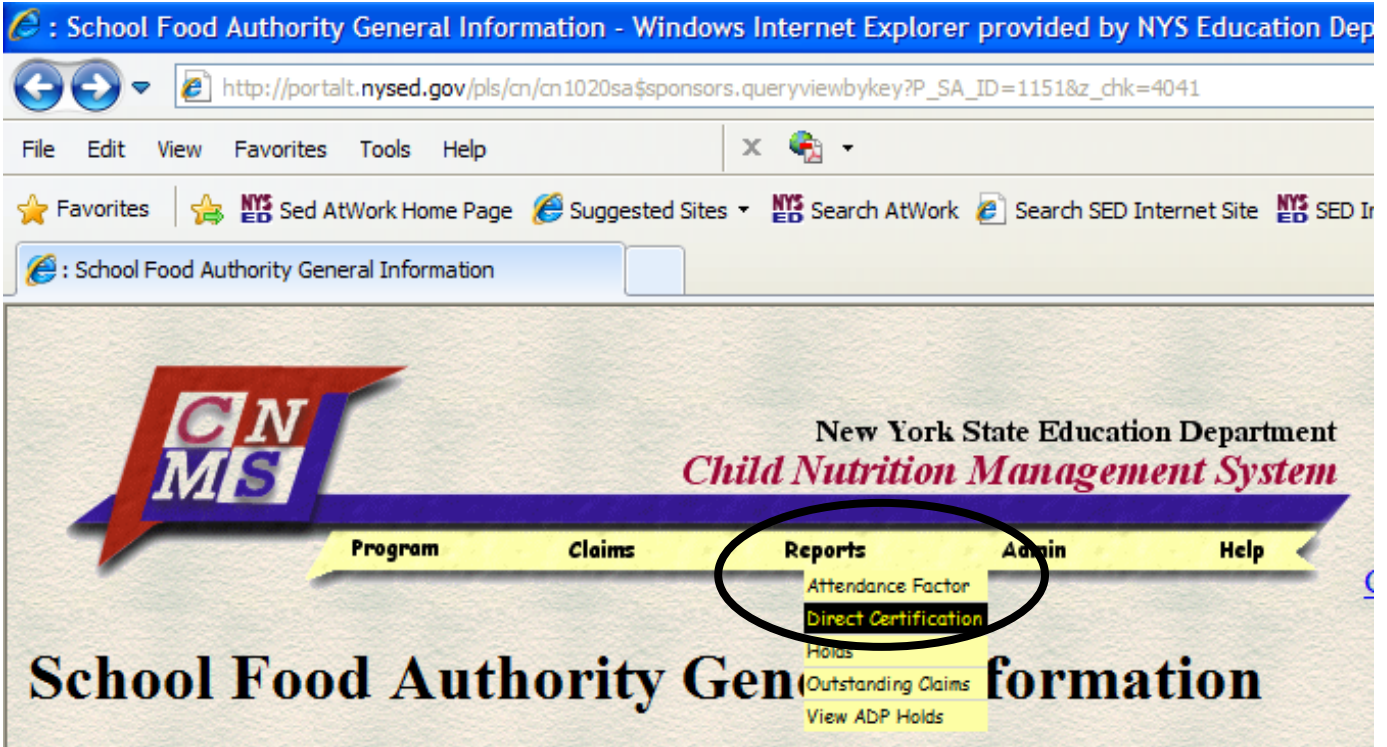
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6. Click the "**I agree**" button under the disclosure statement.
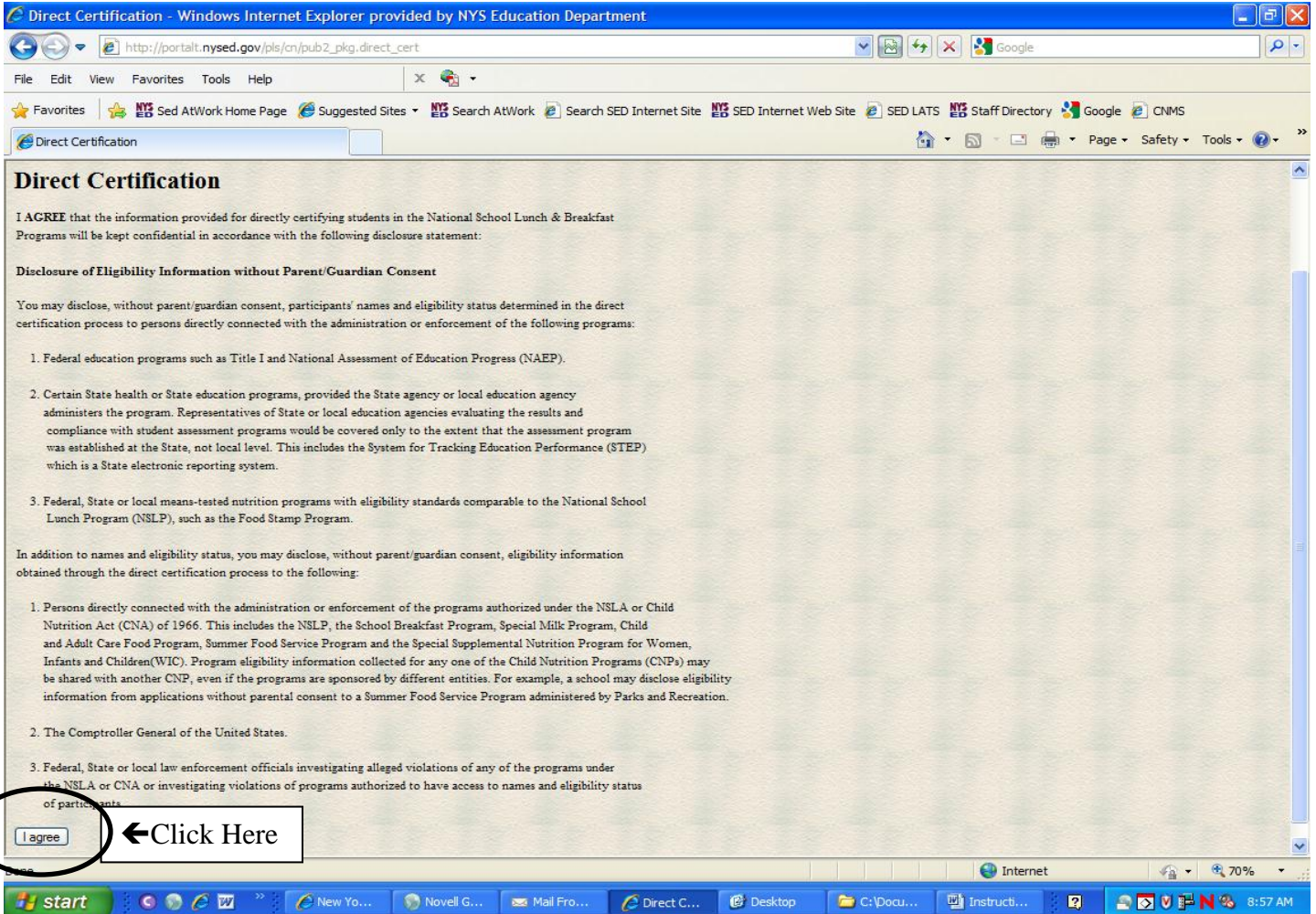
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7.   The following screen should appear. You will enter the same User Name and Password as you used to enter the CNMS. You will also be prompted to enter **pwbr** in the required field "Database".

Troubleshooting:
1. All of the following need to be entered
   a. Ensure username is entered in the appropriate box, and password is entered correctly as logging into the CNMS
   b. Ensure "**pwbr**" is entered as the database
   c. Click "**Go**," do not hit the enter key.

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8.   Once you have logged into Discoverer you will select the "**Direct Certification SNAP/MEDI 2014-15**" by clicking the *plus sign* (inside of arrow) and then clicking on "**2014 Eligible Students**".

Click here

Click Here

Click here

9.   The following screen should appear. Select "**Preferences**," which is located in the upper right corner of the screen.

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10.   On the preferences screen, shown below:

    a.   Uncheck the box "**Limit retrieved query data to**" as shown below.

    b.   The value entered in the "**Cancel list-of-values retrieval after**" box should be changed to **60** seconds.

    c.   Then select "**Apply**." You will be returned to the previous screen.

    d.   **Please note: Excel 2003 is limited to 65,536 rows. Therefore, if your district/school has more than 65536 rows of data, you will not be able to open or save that data set in Excel.** If you have multiple zip codes that will result in more than 65,536 rows of data you can create two separate files. Split your zip codes into two groups and then access them separately.

Uncheck Here

Change this number to **60**.

Select "**Apply**", after adjusting both the "**Limit retrieved query data to**" and "**Cancel list-of-values retrieval after**".

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11. Enter the zip code(s) in the **Zip Code** field. Separate multiple zip codes with a comma.
    a. Troubleshooting:
        i. Check to see that your firewall will allow access to the site
        ii. Go to tools on your internet browser > Internet options > Security tab > adjust the setting to medium security level or below
        iii. Contact your IT staff for suggestions

12. Click on the *flashlight icon* next to the "**File Date**" field. This will bring up a search screen, allowing you to select the file date to search.
   a. *** DO NOT TYPE ANYTHING IN THE TEXT FIELDS THAT STATES "CLICK FLASHLIGHT ICON TO SELECT ZIP CODES" OR "CLICK FLASHLIGHT ICON TO SELECT FILES". THIS DETERMINES WHICH DATA SET YOU WOULD LIKE TO VIEW.
   b. Click the flashlight icon to choose which data set you would like to view. Depending on the time of year, the following data sets could appear: July 2014, October 2014, January 2014 and April 2014.
   c. The data will be updated four times during the school year. LEAs are required to access the data three times during the school year. You will be notified when the data is available to be accessed in July, October, January and April. You can access the data more than once as the data will remain the same. You will select the month that you are accessing.

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13. If you would like to view only students certified for SNAP/TANF benefits from the July data set (first round of mandatory DCMP), select ONLY "**Jul 2014**" and click on "**Move**" to move it from the "**Available**" box to the "**Selected**" box. If you would like to retrieve a cumulative list of students eligible for free lunch, choose "**Move All**"

14. After you have moved the month(s) over to the "**Selected**" box, click "**Select**."

Jul 2014 (Currently available)
Oct 2014 (Will be available in October)
Jan 2015 (Will be available in January)
Apr 2015 (Will be available in April)

15. After selecting all of the zip codes that pertain to your district and the month, click "go" to run the download.

16. Wait for the download to complete. This may take a couple minutes depending on how large the file is.

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17.   Now that you have selected the Direct Certification Data (DCD), you will be responsible for retaining the data and matching it to your school enrollment records. As shown below, the *actions tab* lists functions for maintaining the data. Click "**Export**" to transfer the data to a file format that best suits your district/school's technological needs. Once the download has completed, click export to open/save the file. This way you can scroll through the names easily and have this download saved in a secure place.

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18.   Use the drop-down list to specify the export file format required. CSV will open in Excel and can be used to upload the data into point of sale systems such as Nutrikids and WinSnap. The recommended format if you are manually matching data is the Microsoft Excel Workbook. After selecting the file format, click the "**Export**" button to the right of the drop-down list .

19.   Click on the "**Click to view or save**" button.
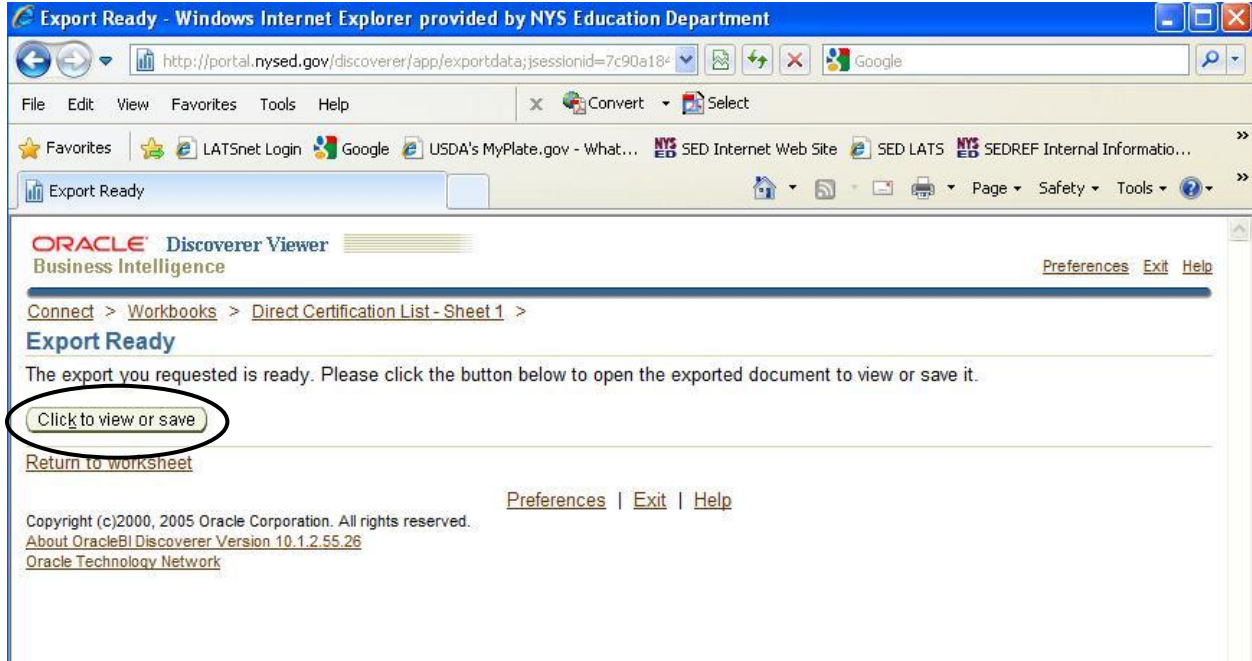
20.   <u>**Save the entire file first, by clicking save.**</u> This will prompt you to select where the file will be saved.
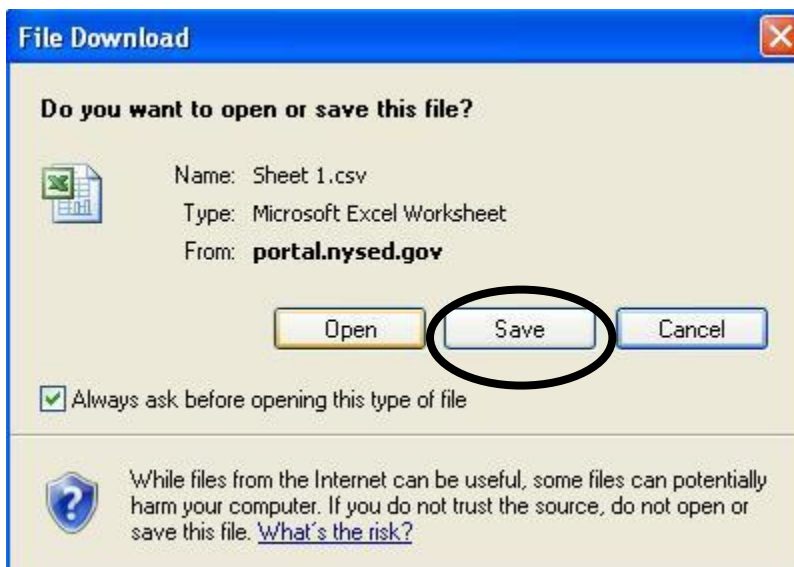
21.   First select the location, then the folder you would like to save the documents in. Don't forget to name the document(s) appropriately. See below.

First, select the location.

Second, select the folder.

Save As

Save in: My Documents

Child Nutrition Program Documents

Bid Specs

Staff Information

Desktop

My Documents

My Computer

Select the folder you would like to save the DCMP data file in. Name the document appropriately. Examples include:
DCMP July 2014-15
DCMP October 2014-15
DCMP January 2014-15
DCMP April 2014-15
*This will ensure you can find the files easily when necessary.

Forth, click save

File name: DCMP July 2013-14   Save
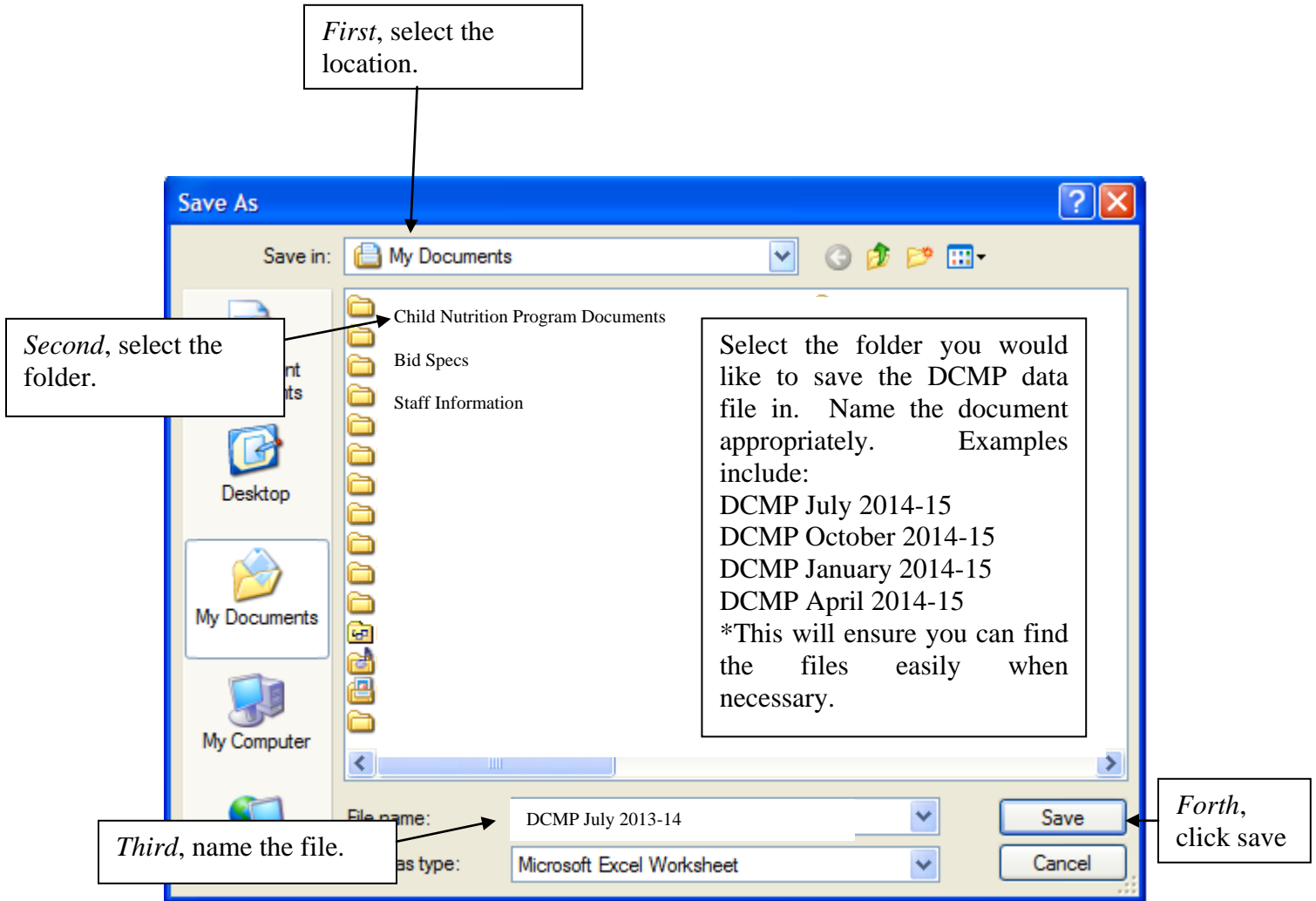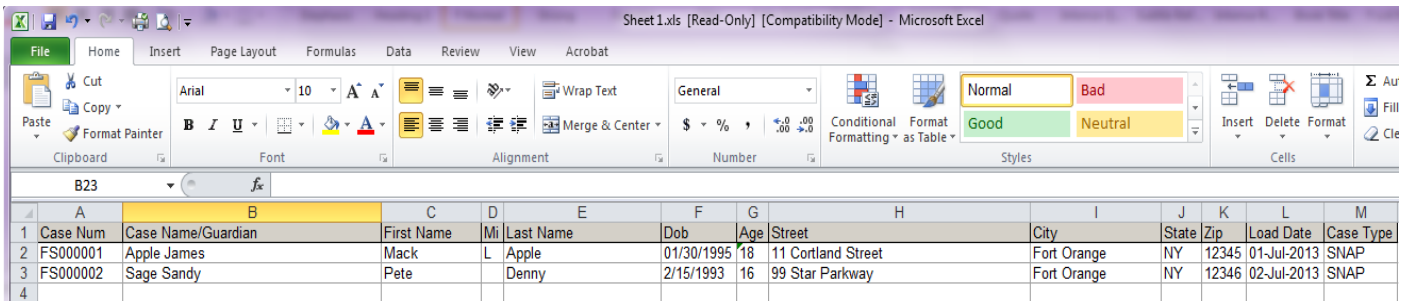
Third, name the file.

as type: Microsoft Excel Worksheet   Cancel

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22. The file will be alphabetized by last name. Similar to searching through a phone book, look to certify each child on your enrollment list based on the current list of eligible students that was downloaded.
     a. ****Do NOT alter this file by adding or subtracting any data, unless you are adding individually searched students. Instructions are available for individually searching students. You must retain a copy of the original list of SNAP/Medicaid recipients (DCMP file) that you obtained from the discoverer database. If you are going to create a new list which only contains direct certified students in you school/site, you MUST RESAVE THE FILE UNDER A NEW NAME.

     b. Saving a copy of this file under a new name can be done as follows:
         i. Click "file", then click "save as". Then repeat number 20 of these instructions to rename and save the file.

First, click "**File**."

Second, click "**Save As…**"

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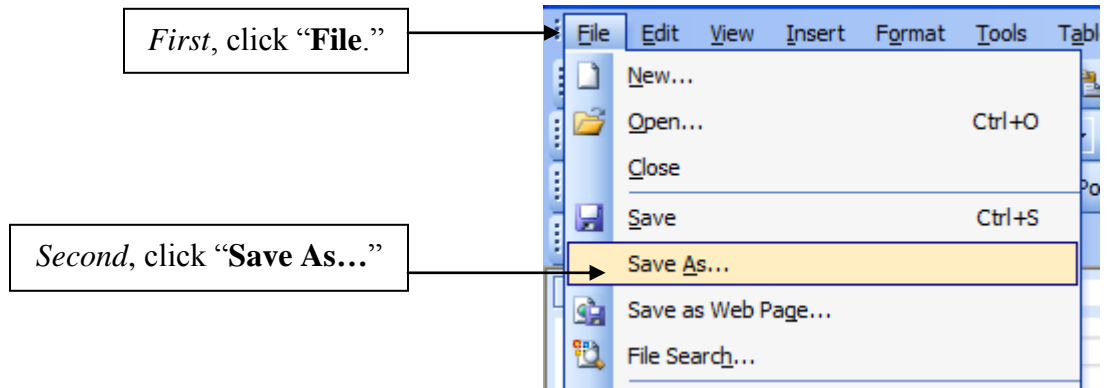
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For Schools/Districts that will be manually matching enrollment records to the direct certification data (DCD), please review the instructions below.

1. The Direct Certification Data (DCD) that you have retrieved from the Discoverer database will look as follows:
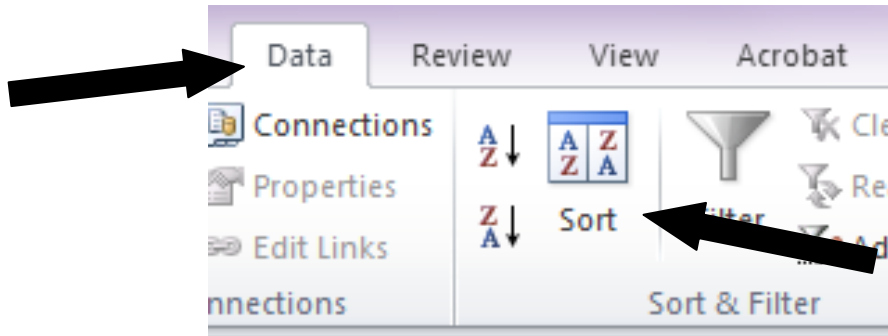

2. Arrange the data in the same way that your enrollment records are arranged. If your enrollment record is alphabetized by student's last name and zip code then sort the DCD that way. See below for sorting data in excel.

    a. Click on the column that you would like to sort first. In this case, you would click on column E, because you are sorting by zip code and then alphabetically by the student's last name. See below.
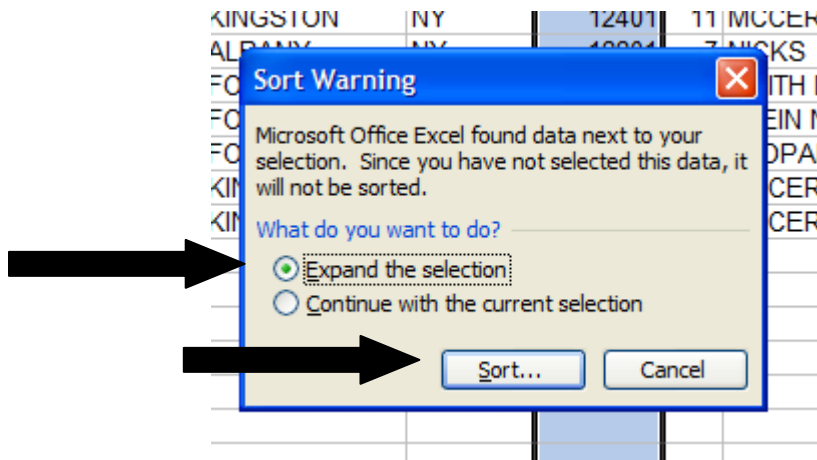
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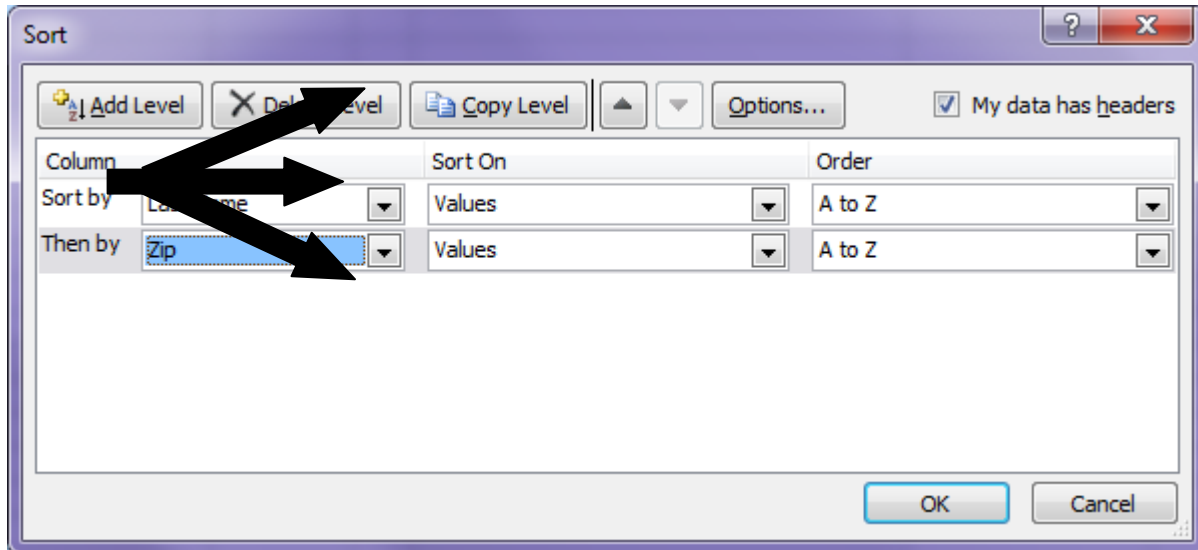3. After you have selected the column you want sorted first, click on "**Data**", then click on "**Sort**".

4. The following message will pop-up. You will leave it as shown below "**Expand the selection**" and then click on "**Sort…**"

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5. The following message will pop-up. Sort by "**Last name**" then, "**Add level**" and select "**Zip**" next to "**Then by**".   Order is A to Z. Then click "**OK**".

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6. After you have completed steps 1-5 for manually matching your data. The file should appear as follows:

  a. *Notice that the children's last names have been arranged in alphabetical order by zip code. This will ease the matching process between your enrollment record and the DCD record.

7. On your enrollment record, highlight the names that appear on BOTH records. If you have multiple buildings that students attend, make sure the student's building is indicated on the enrollment record also. From this a new list can be created of students that have been successfully matched. Create a list of children that have been matched by this process and keep it with your applications.

Please see "Direct Certification Case Number Search" and "Direct Certification Last Name Search" for matching additional students.