

## **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.

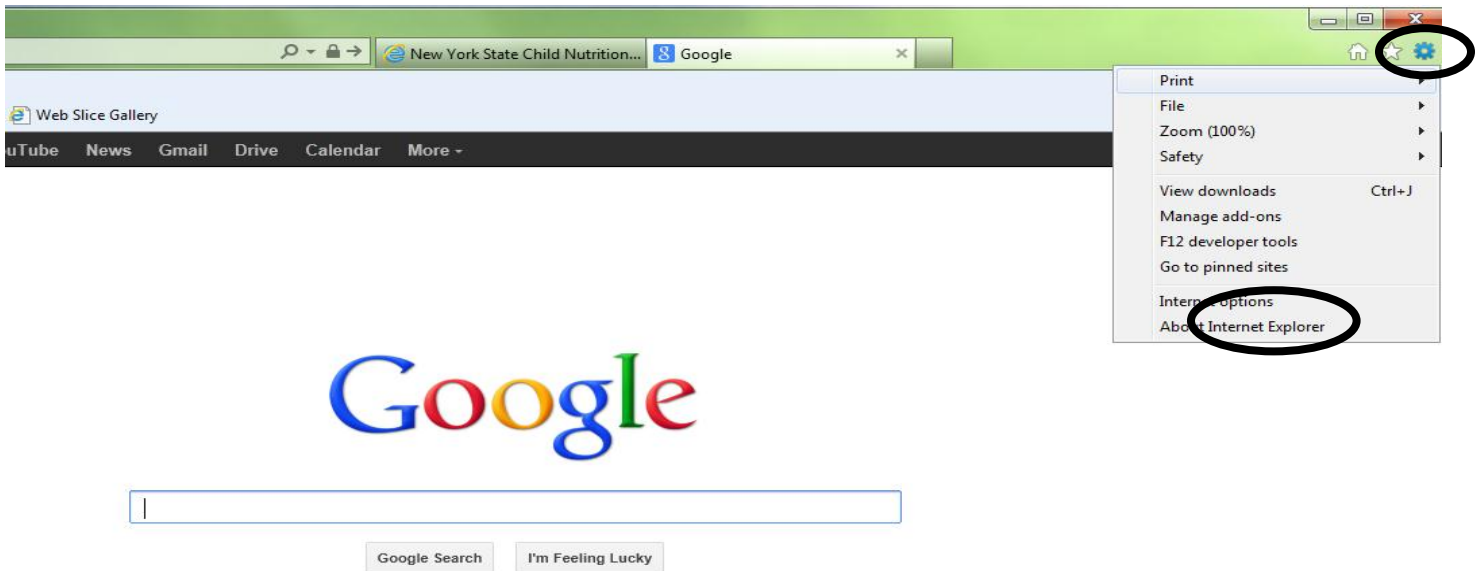
Schools assume more responsibility for the matching process. Districts/schools with electronic enrollment records or point of sale (POS) systems should contact all applicable information technology (IT) staff to determine how to utilize the DCD effectively. Some companies provide school food management 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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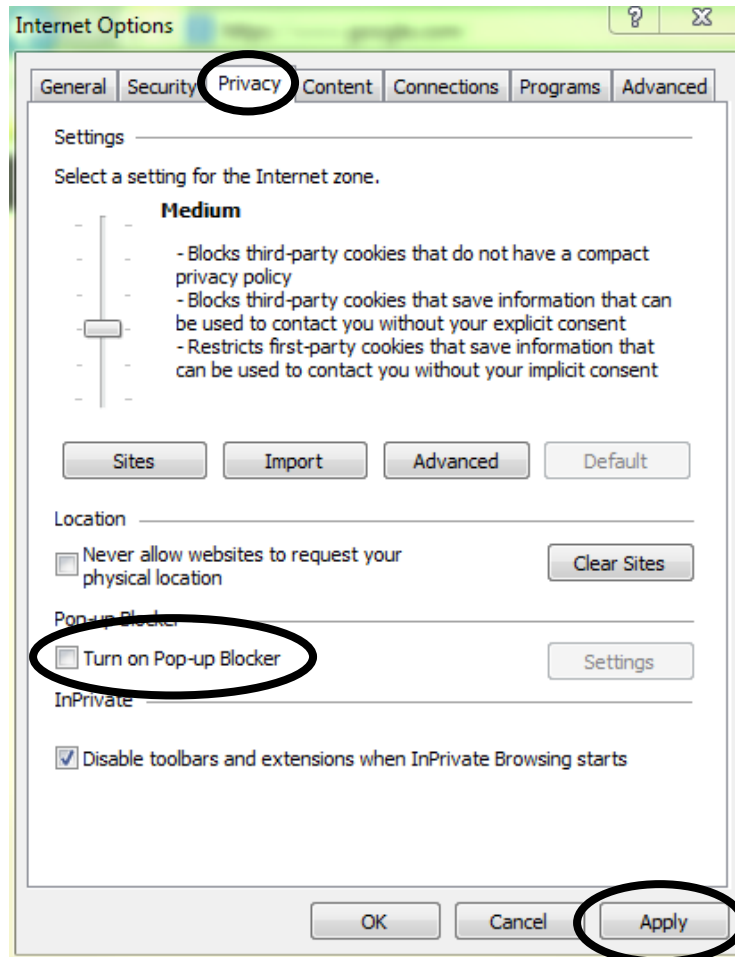
**Updated Database: CNMS passwords will have to be changed if they do not meet the following criteria or if you are denied access to the Discoverer database. Passwords are case sensitive, must be at least 8-12 characters, begin with a letter, and contain at least 1 number.**

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.



## Instructions for Accessing Direct Certification Data for the Matching Process

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.



**NYSED.gov**

[CNMS Home](#) | [USDA](#) | [Links](#) | [Glossary](#) | [Annual Checklist](#) | [Contact Us](#) | [FAQs](#) | [About Us](#)

[Search](#) | [Reset Password](#)

### Welcome to the Child Nutrition Knowledge Center

**Click to Enter**  
The Child Nutrition Management System

**Workshops Meetings Trainings**

- Alert** [Child Nutrition Program Workshops \(8/14\)](#)  
Workshops for Food Service Directors/Managers, Food Service Personnel and Administrators. Workshop topics include: Eligibility & Verification, Meal Pattern & All Foods Sold In School and Administrative Review & Resource Management. Brooklyn dates have been added.
- Alert** [Professional Cooking 2014 \(1/14\)](#)  
Thank you all for another successful year of Professional Cooking. Looking forward to next year already!
- [FNS-742 SFA Verification Collection Report \(Attachment G\) PowerPoint \(10/13\)](#)  
LEAs must submit the SFA Verification Collection Report to the NYSED Child Nutrition Program Office in CNMS by December 15, 2013.
- [Appendix to Managing Your Child Nutrition Programs \(9/13\)](#)  
The Appendix provides additional resources for managing your child nutrition programs. It is not necessary to print

**Need to Know**

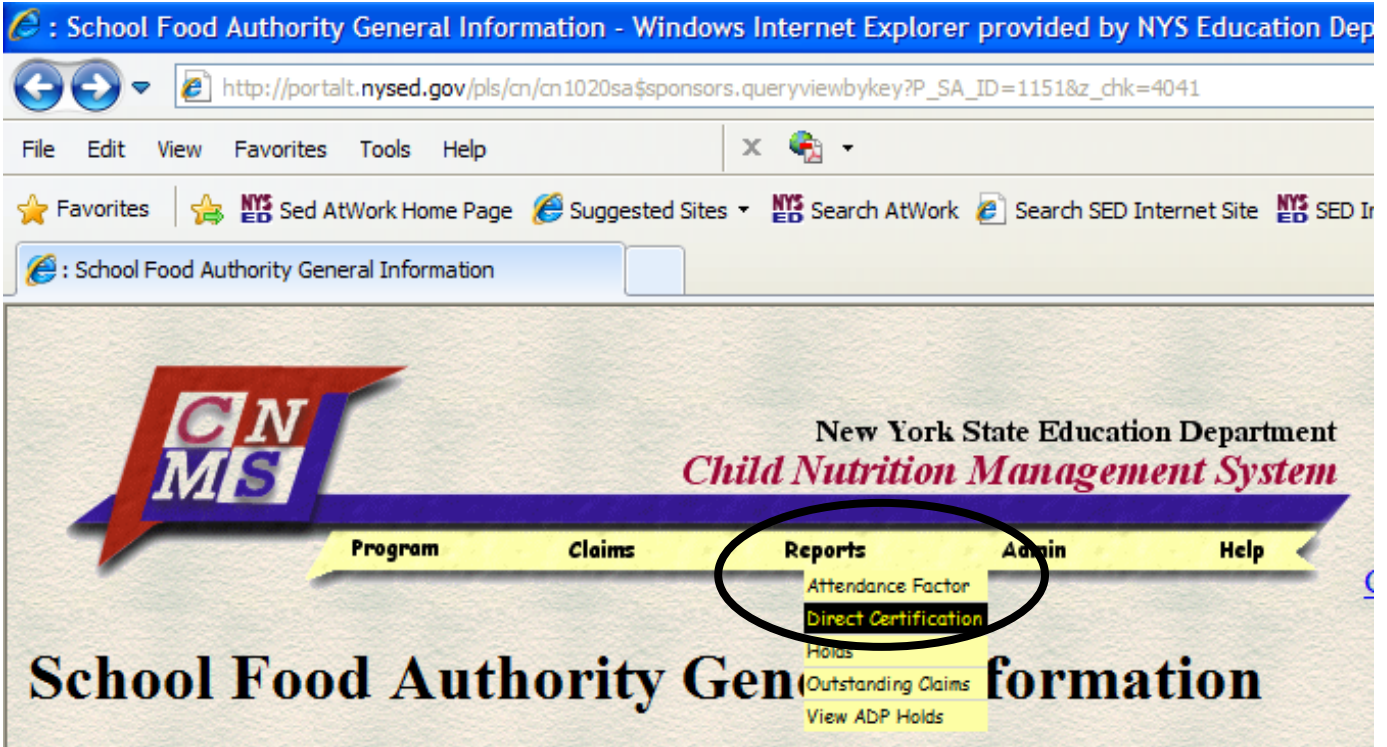
- [2014-2015 Policy Booklet \(8/14\)](#)
- [Administrative Reviews Scheduled In School Year 2014-15](#)  
This is a list of School Food Authorities (SFA) currently scheduled for an Administrative Review in school year 2014-15. It is subject to change. We will be offering an Administrative Review webinar in the fall for schools that are scheduled for review in the 2014-15 school year.
- Alert** [2014-15 Annual Renewal Instructions \(8/14\)](#)  
The 2014-15 Annual Renewal is now available for

**FIND A SUMMER FOOD SITE NEAR YOU**  
[CLICK HERE](#)

**Think Breakfast!** Check out our new teen Think Breakfast! video!!

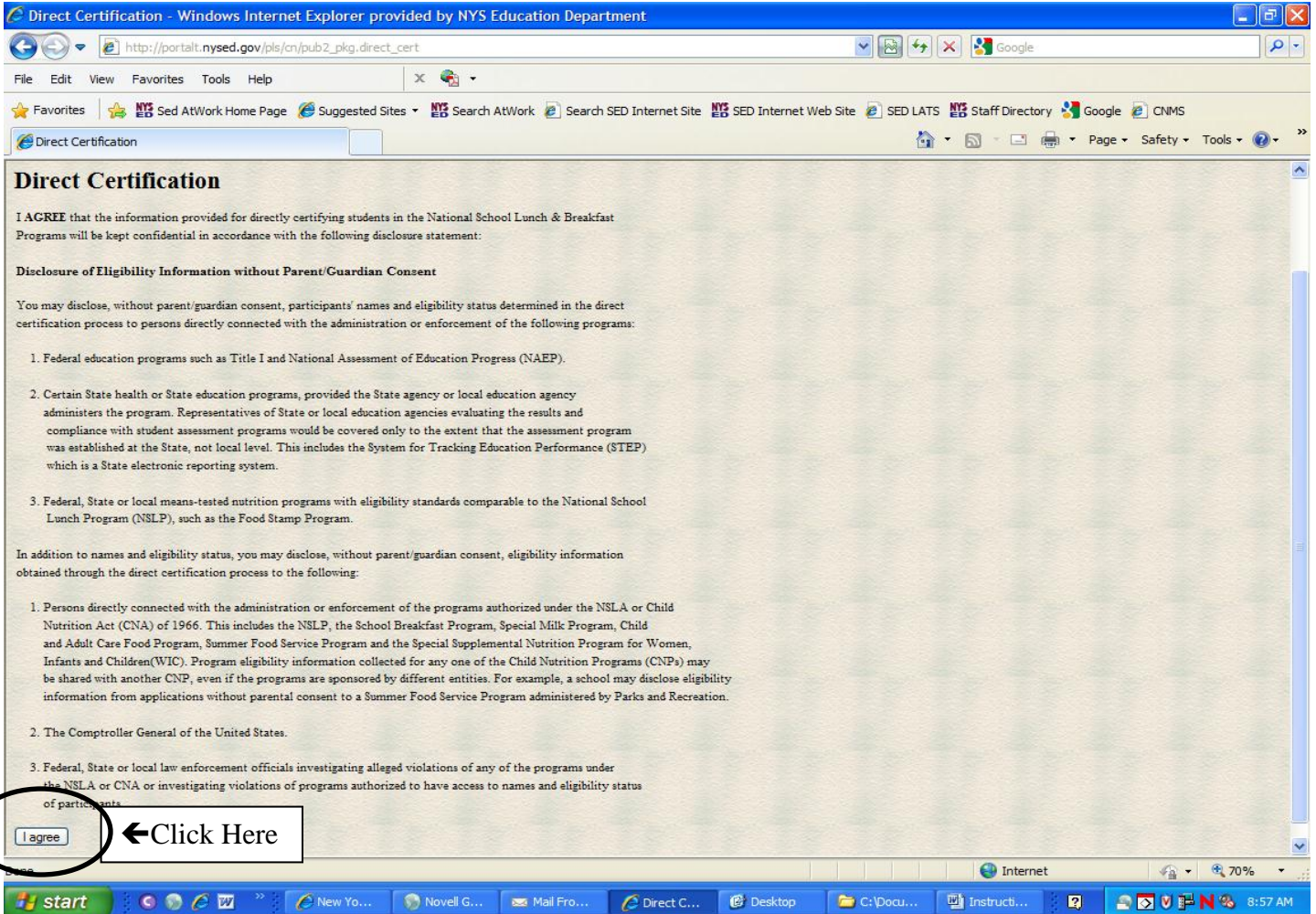
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5. Once you are logged into the CNMS, click: **Reports** → **Direct Certification**



# Instructions for Accessing Direct Certification Data for the Matching Process

6. Click the “**I agree**” button under the disclosure statement.



## Instructions for Accessing Direct Certification Data for the Matching Process

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”.

[Connect Directly](#)

### Connect to OracleBI Discoverer

To connect to OracleBI Discoverer, click on a connection name or enter your connection details directly.

#### Choose Connection

Details	Connection	Description	Update	Delete
<a href="#">Show</a>	C4E ALL	Contract for Excellence Data Mart		
<a href="#">Show</a>	SAMS	SAMS Discoverer Production Reports		
<a href="#">Show</a>	SEDREF General Reports	SEDREF General Reports		

#### Connect Directly

Enter your connection details below to connect directly to OracleBI Discoverer

\* Indicates required field.

Connect To

\* User Name

\* Password

\* Database

End User Layer

Locale

**Username and password are the same as CNMS log in:**

Username

Password- Case Sensitive

Enter “**pwbr**” in the database field

Click “**Go**,” do not hit the enter key.

#### 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”.

The screenshot shows the Oracle Discoverer Viewer interface. At the top, there is a header with "ORACLE Discoverer Viewer Business Intelligence" and navigation links for "Preferences", "Exit", and "Help". Below the header, there is a "Connect >" link. The main heading is "Worksheet List". Underneath, there is a "Search" section with a text box and a "Go" button. Below that is a "Result List" section with a "Refresh" button and "Expand All" / "Collapse All" links. The results are displayed in a table with columns "Focus", "Name", and "Description". The "Focus" column contains expand/collapse icons. The "Name" column contains the workbook names. The "Description" column is currently empty. The first row is "Discoverer Workbooks". The second row is "Direct Certification SNAP/MEDI 2014-15", which is circled in red. Below it are three rows for search filters: "Direct Certification SNAP/MEDI 2014-15 Case Number Search", "Direct Certification SNAP/MEDI 2014-15 DOB Search", and "Direct Certification SNAP/MEDI 2014-15 Last Name Search".

Focus	Name	Description
+	Discoverer Workbooks	
+	Direct Certification SNAP/MEDI 2014-15	
+	Direct Certification SNAP/MEDI 2014-15 Case Number Search	
+	Direct Certification SNAP/MEDI 2014-15 DOB Search	
+	Direct Certification SNAP/MEDI 2014-15 Last Name Search	

Click here

The diagram shows a list of search results. The first item is "Direct Certification SNAP/MEDI 2014-15", which is circled in red. Below it are three search filter items. An arrow points from a box labeled "Click Here" to the plus sign icon next to the first item. Another arrow points from the circled item to the text "2014 Eligible Students", which is also circled in red.

+	Direct Certification SNAP/MEDI 2014-15	2014 Eligible Students
+	Direct Certification SNAP/MEDI 2014-15 Case Number Search	
+	Direct Certification SNAP/MEDI 2014-15 DOB Search	
+	Direct Certification SNAP/MEDI 2014-15 Last Name Search	

Click here



## Instructions for Accessing Direct Certification Data for the Matching Process

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

The screenshot displays the Oracle Discoverer Viewer interface. At the top, the header includes "ORACLE Discoverer Viewer Business Intelligence" and navigation links for "Preferences", "Exit", and "Help". The main content area shows the worksheet title "Direct Certification SNAP/MEDI 2014-15 - 2014 Elibigle Students" and a "Parameters Needed" section with input fields for "Zip Code" and "File Date". A "Gg" search button is also present. At the bottom, a footer contains copyright information and additional links for "Preferences", "Exit", and "Help". A callout box with a white background and black border is positioned on the right side, containing the text "Click 'Preferences' here" and "Or below". An arrow points from the top-right "Preferences" link to the callout box, and another arrow points from the bottom-right "Preferences" link to the same callout box.

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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.

The screenshot shows the Oracle Discoverer Viewer Preferences screen. The title bar reads "ORACLE Discoverer Viewer Business Intelligence" with "Exit" and "Help" buttons. Below the title bar are tabs for "Measure Unit", "Axis Label", "Summary Data", and "Fan Trap Detection". The "Preferences" section is active, showing a "Query Governor" section with several options. The "Limit retrieved query data to" checkbox is circled in red and has a callout box pointing to it that says "Uncheck Here". The "Cancel list-of-values retrieval after" field has a value of "15" and a callout box pointing to it that says "Change this number to 60.". The "Apply" button is circled in red and has a callout box pointing to it that says "Select 'Apply', after adjusting both the 'Limit retrieved query data to' and 'Cancel list-of-values retrieval after'.". The "Warn me if predicted time exceeds" field has a value of "60" and the "Prevent queries from running longer than" field has a value of "1800". The "Retrieve data incrementally in groups of" field has a value of "250".

ORACLE Discoverer Viewer  
Business Intelligence

Exit Help

Measure Unit Axis Label Summary Data Fan Trap Detection

### Preferences

Specify values for the following Preferences. To change these options later, click the Preferences link. Cancel Apply

#### Query Governor

Warn me if predicted time exceeds 60  
(Enter a value between 1 and 999999 in seconds)

Prevent queries from running longer than 1800  
(Enter a value between 1 and 999999 in seconds)

Limit retrieved query data to  
(Enter a row limit value between 1 and 999999)

Retrieve data incrementally in groups of 250  
(Enter a row limit value between 1 and 10000)

Cancel list-of-values retrieval after 15  
(Enter a value between 1 and 99999 in seconds)

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

The screenshot shows the Oracle Discoverer Viewer interface. At the top, there is a header with the Oracle logo and 'Discoverer Viewer Business Intelligence'. On the right side of the header, there are links for 'Preferences', 'Exit', and 'Help'. Below the header, there is a navigation bar with 'Connect >' and 'Workbooks >'. The main title of the report is 'Direct Certification SNAP/MEDI 2014-15 - 2014 Elibigle Students'. Below the title, it says 'Last run Monday, August 25, 2014 12:10:17 PM EDT'. There is a 'Worksheets' section with a sub-section for '2014 Elibigle Students'. The 'Parameters Needed' section is highlighted, with the instruction 'Select values for the following parameters. \* Indicates required field'. There are two required fields: '\* Zip Code' and '\* File Date', each with a text input box. Below the input boxes is a 'Go' button. At the bottom of the page, there is a copyright notice: 'Copyright (c)2000, 2010 Oracle Corporation. All rights reserved. About Oracle BI Discoverer Viewer Version 11.1.1.6.0 Oracle Technology Network <SCRIPT SRC="/oracle

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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.

The image shows two screenshots from the Oracle Discoverer Viewer interface. The top screenshot is titled "Direct Certification SNAP/MEDI 2014-15 - 2014 Eligible Students" and displays a "Parameters Needed" section. It lists two required parameters: "Zip Code" (with the value "12345") and "File Date". A flashlight icon is circled next to the "File Date" input field. A callout box with an arrow points to this icon, containing the text: "Do not type anything in this text field. Click the flashlight icon to select the appropriate values." The bottom screenshot is titled "Search and Select: Mon YYYY Parameter 1" and shows a search interface. It includes a "Search" section with a dropdown menu set to "Contains", a search input field, and a "Go" button. Below this is a "Results" section with two columns: "Available" (containing "Jul 2014") and "Selected" (which is empty). Between the columns are buttons for "Move", "Move All", "Remove", and "Remove All".

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- 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**”
- After you have moved the month(s) over to the “**Selected**” box, click “**Select.**”

ORACLE Discoverer Viewer  
Business Intelligence [Help](#)

### Search and Select: Mon YYYY Parameter 1

This page enables you to select the parameter values Cancel Select

#### Search

To find the value, select a filter in the drop down list and enter a word in the text field, then click the go button. To see a list of all values, clear the search box and click the go button

Search by

Search for  Go

Case Sensitive

#### Results

Available	Selected
	Jul 2014

⏪ Move ⏩ ⏪ Move All ⏩ ⏪ Remove ⏩ ⏪ Remove All ⏩

⏪ Previous 1-1 of 1 Next ⏩

Cancel 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)

## Instructions for Accessing Direct Certification Data for the Matching Process

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

The screenshot shows the Oracle Discoverer Viewer interface. The title bar reads 'ORACLE Discoverer Viewer Business Intelligence'. The main heading is 'Direct Certification SNAP/MEDI 2014-15 - 2014 Elibigle Students'. Below the heading, it says 'Last run Monday, August 25, 2014 12:10:17 PM EDT'. There are two tabs: 'Worksheets' and '2014 Elibigle Students'. The 'Parameters Needed' section is active, showing instructions to 'Select values for the following parameters.' and a note '\* Indicates required field'. There are two input fields: '\* Zip Code' with the value '12345,12346' and '\* File Date' with the value 'Jul 2014'. A 'Go' button is located below the input fields. At the bottom, there is a copyright notice and links for 'About Oracle BI Discoverer Viewer Version 11.1.1.6.0' and 'Oracle Technology Network'.

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

The screenshot shows the Oracle Discoverer Viewer interface during a query execution. The title bar reads 'ORACLE Discoverer Viewer Business Intelligence'. The main heading is '2014 Elibigle Students'. The 'Query Progress' section is active, showing 'Executing query' with a clock icon. Below this, there are two rows of information: 'Estimated Elapsed T' and 'Cancel'. A 'Go' button is circled in red. A 'TIP' icon is also visible. At the bottom, there is a copyright notice and links for 'About Oracle BI Discoverer Viewer Version 11.1.1.6.0' and 'Oracle Technology Network'.

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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.

The screenshot displays the Oracle Discoverer Viewer interface. At the top, it shows 'ORACLE Discoverer Viewer Business Intelligence' and navigation links for 'Preferences', 'Exit', and 'Help'. Below the header, the breadcrumb path is 'Connect > Workbooks >'. The main title is 'Direct Certification SNAP/MEDI 2014-15 - 2014 Eligible Students', with a subtitle 'Last run Monday, August 25, 2014 12:39:05 PM EDT'. On the left, the 'Actions' tab is selected and circled, listing options: 'Run query', 'Save as', 'Revert to saved', 'Print this page', 'Export' (circled), 'Send as e-mail', and 'Worksheet options'. The 'Parameters' section includes a 'Go' button and two input fields: '\* Zip Code' with the value '12345;12346' and '\* File Date' with the value 'Jul 2014'. Below this is a 'Table' section with a 'Tools' menu containing 'Layout', 'Sort', and 'Rows and Columns'. At the bottom, a table header is visible with columns: 'Case name/Guardian', 'First name', 'Last name', 'DOB', 'Age', 'Street', 'City', 'State', 'Zip', 'Case Type', and 'Case num'.

## Instructions for Accessing Direct Certification Data for the Matching Process

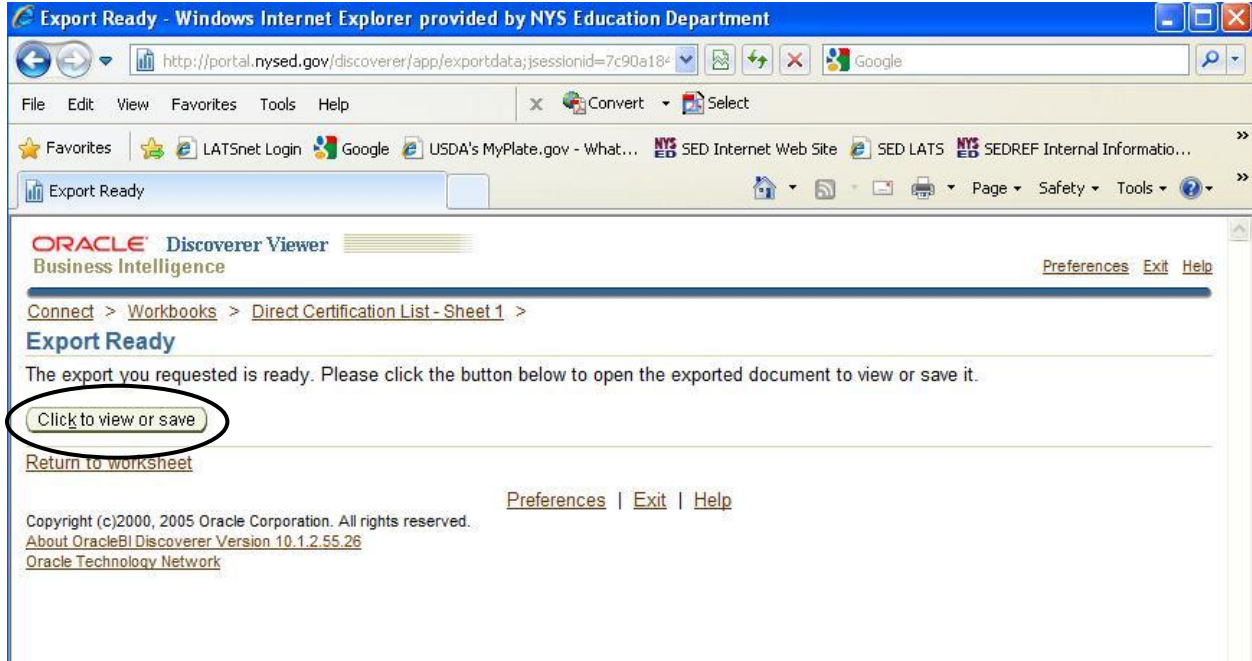
18. Use the drop-down list to specify the export file format required. CSV will open in Excel and can be used to upload the data into point of sale systems such as Nutrikids and WinSnap. The recommended format if you are manually matching data is the Microsoft Excel Workbook. After selecting the file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

The screenshot shows the Oracle Discoverer Viewer interface. The browser window title is "Choose export type - Windows Internet Explorer provided by NYS Education Department". The address bar shows the URL: <http://portal.nysed.gov/discoverer/app/export?event=startExport&stat...>. The browser's address bar and menu bar are visible. The Oracle Discoverer Viewer interface includes a breadcrumb trail: [Connect](#) > [Workbooks](#) > [Direct Certification List - Sheet 1](#) >. The main heading is "Choose export type" with the instruction: "Use the drop-down list to specify the export file format." A drop-down menu is open, showing the following options: CSV (Comma delimited) (\*.csv), DIF (Data Interchange Format) (\*.dif), Formatted Text (Space delimited) (\*.prn), Hyper-Text Markup Language (archived) (\*.zip), Microsoft Excel Workbook (\*.xls), Oracle Reports XML (\*.xml), Portable Document Format (PDF) (\*.pdf), SYLK (Symbolic Link) (\*.slk), Text (Tab delimited) (.txt), Web Query for Microsoft Excel 2000+ (\*.iqy), and WKS (Lotus 1-2-3) (\*.wks). The "Export" button is circled in red. A text box with an arrow pointing to the "Export" button contains the text: "After selecting the file format, click export here". Another text box with arrows pointing to the "CSV (Comma delimited) (\*.csv)" and "Microsoft Excel Workbook (\*.xls)" options contains the text: "Recommended formats to select: • For electronic match: CSV • For manual match: Excel".

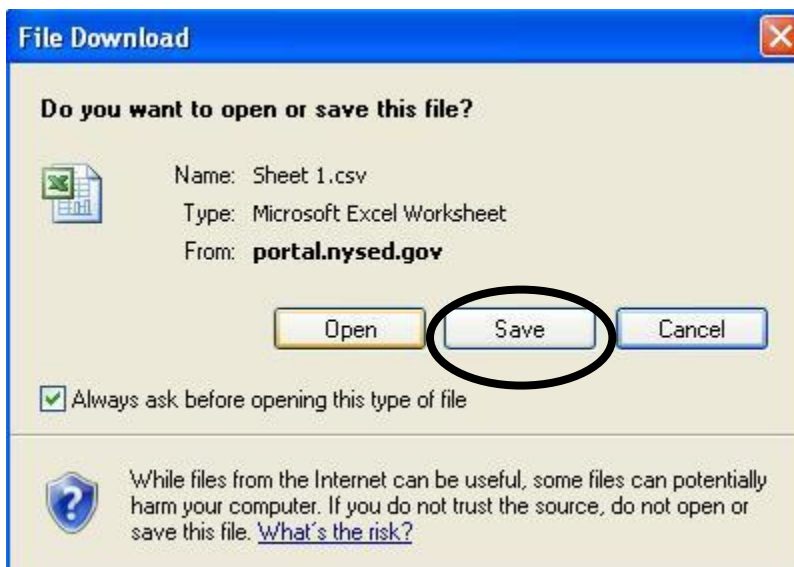


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19. Click on the “Click to view or save” button.

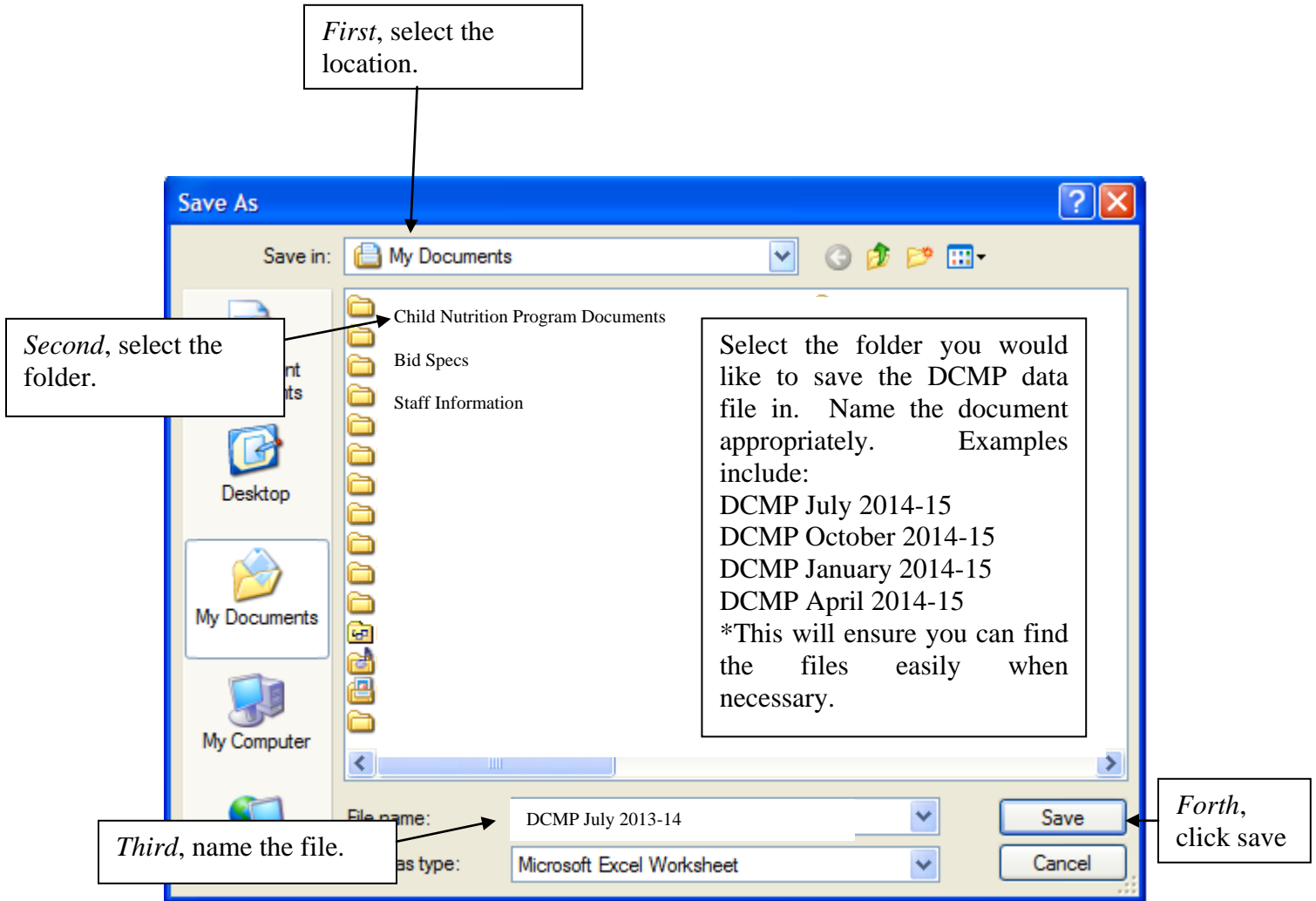


20. **Save the entire file first, by clicking save.** This will prompt you to select where the file will be saved.



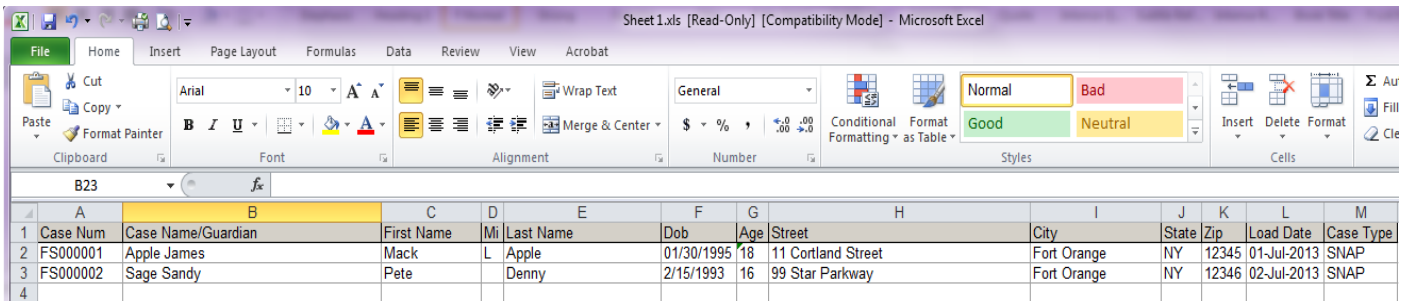
## Instructions for Accessing Direct Certification Data for the Matching Process

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.



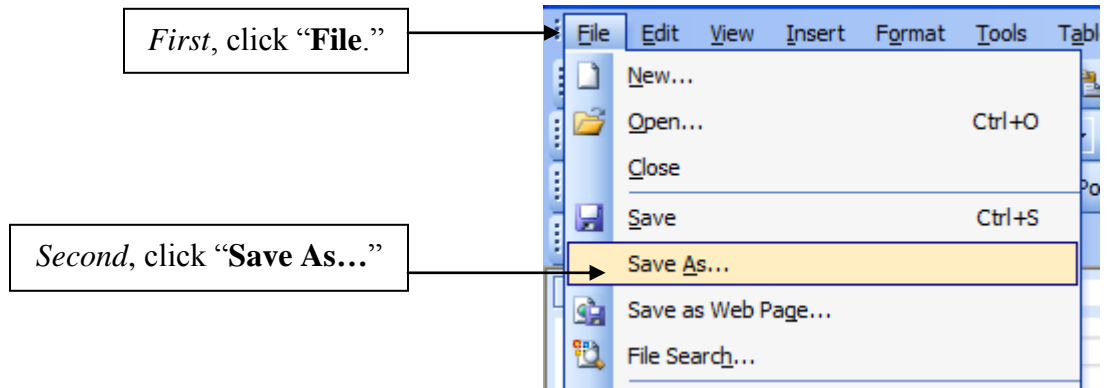
## Instructions for Accessing Direct Certification Data for the Matching Process

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.



Case Num	Case Name/Guardian	First Name	MI	Last Name	Dob	Age	Street	City	State	Zip	Load Date	Case Type
FS000001	Apple James	Mack	L	Apple	01/30/1995	18	11 Cortland Street	Fort Orange	NY	12345	01-Jul-2013	SNAP
FS000002	Sage Sandy	Pete		Denny	2/15/1993	16	99 Star Parkway	Fort Orange	NY	12346	02-Jul-2013	SNAP

- 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.



## Instructions for Accessing Direct Certification Data for the Matching Process

**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:

Case Num	Case Name/Guardian	First Name	Last Name	Dob	Age	Street	City	State	Zip	Load Date	Case Type
FS000001	Apple James	Mack	L Apple	01/30/1995	18	11 Cortland Street	Fort Orange	NY	12345	01-Jul-2013	SNAP
FS000002	Sage Sandy	Pete	Denny	2/15/1993	16	99 Star Parkway	Fort Orange	NY	12346	02-Jul-2013	SNAP

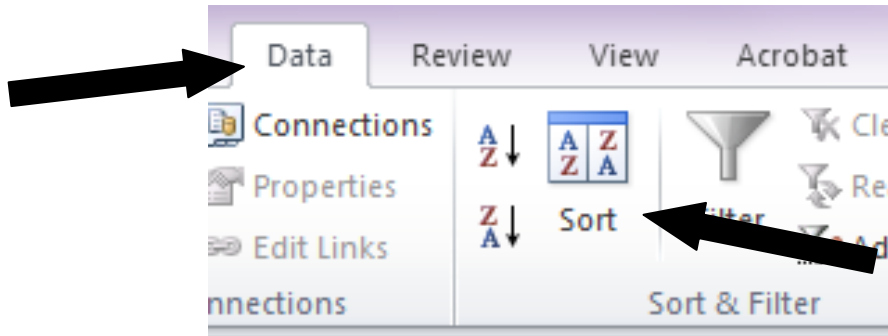
2. Arrange the data in the same way that your enrollment records are arranged. If your enrollment record is alphabetized by student’s last name and zip code then sort the DCD that way. See below for sorting data in excel.

- 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.

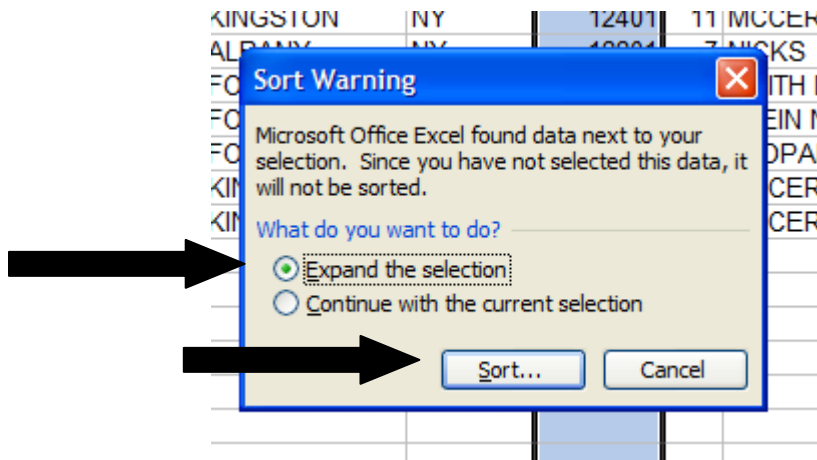
Case Num	Case Name/Guardian	First Name	Last Name	Dob	Age	Street	City	State	Zip	Load Date	Case Type
FS000001	Apple James	Mack	L Apple	01/30/1995	18	11 Cortland Street	Fort Orange	NY	12345	01-Jul-2013	SNAP
FS000002	Sage Sandy	Pete	Denny	2/15/1993	16	99 Star Parkway	Fort Orange	NY	12346	02-Jul-2013	SNAP

## Instructions for Accessing Direct Certification Data for the Matching Process

3. After you have selected the column you want sorted first, click on “**Data**”, then click on “**Sort**”.

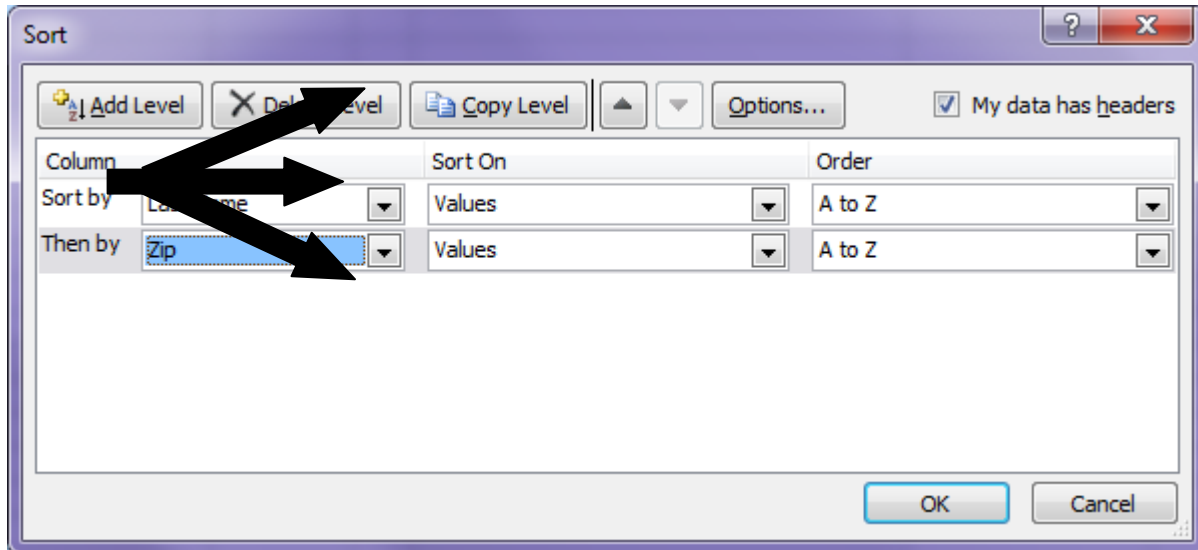


4. The following message will pop-up. You will leave it as shown below “**Expand the selection**” and then click on “**Sort...**”



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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**”.



## Instructions for Accessing Direct Certification Data for the Matching Process

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.

	A	B	C	D	E	F	G	H	I	J	K
1	Last name	First name	Mi	Dob	Street	City	State	Zip	Age	Case name/Guardian	Case num
2	BROWN	PETE	D	11/27/2004	21 DINER DR	ALBANY	NY	12201	6	NICKS JOAN	F411111
3	JOHNSON	ROB	O	2/8/2004	21 DINER DR	ALBANY	NY	12201	7	NICKS JOAN	F411111
4	APPLE	TOSH	J	1/14/1998	11 CORTLAND ST	FORT ORANGE	NY	12345	13	APPLE/JAMES	F000001
5	APPLE	MACK	J	8/4/2002	11 CORTLAND ST	FORT ORANGE	NY	12345	8	APPLE/JAMES	F000001
6	BACH	SUSAN	F	7/2/1992	2 MOZART AVE	FORT ORANGE	NY	12345	18	BACH BRITNEY	F577777
7	CURRY	RON	E	5/27/2006	P O BOX 5555	FORT ORANGE	NY	12345	5	SAGE SANDY	F288888
8	EVANS	EMILY		12/5/1999	1222 BROADWAY	FORT ORANGE	NY	12345	11	JOHNSON TERI	F799999
9	FAME	PRINCE		3/16/1995	99 STAR PKWY	FORT ORANGE	NY	12345	16	FAME VICKI	F200000
10	GOLF	TAYLOR	Z	5/3/1996	540 FAIRWAY DR	FORT ORANGE	NY	12345	15	GOLF TAYLOR	F433333
11	GOLF	TIGER		11/16/2001	540 FAIRWAY DR	FORT ORANGE	NY	12345	9	GOLF TAYLOR	F433333
12	GOLF	PHIL	Z	5/29/2003	540 FAIRWAY DR	FORT ORANGE	NY	12345	8	GOLF TAYLOR	F433333
13	HOPEWELL	KERI	P	10/10/1999	1B ROCKBRIDGE WAY	FORT ORANGE	NY	12345	11	HOPEWELL FAITH	F000005
14	ION	ADAM	Z	6/9/1995	100 CHARGED AVE	FORT ORANGE	NY	12345	16	ION JESSE	F111119
15	JONES	LILLY	E	7/15/1995	8 PADDY PL	FORT ORANGE	NY	12345	15	SMITH DANA	F888888
16	KLEIN	BECKY	M	6/13/1998	44 MAIN ST APT 1	FORT ORANGE	NY	12345	13	KLEIN NATE	F455555
17	LEOPARD	GABE	M	9/10/2005	1818 BROADWAY	FORT ORANGE	NY	12345	5	LEOPARD JESSICA	P111117
18	JEFFERSON	TONY	E	10/5/1999	133 SPOON AVE	KINGSTON	NY	12401	11	MCCEREAL TOM	P444444
19	MCCEREAL	TRIX		7/7/1992	166 FORK DR	KINGSTON	NY	12401	18	MCCEREAL TOM	P444444
20	MCCEREAL	LUCKY		4/8/2001	133 SPOON AVE	KINGSTON	NY	12401	10	MCCEREAL TOM	P444444
21											

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.**