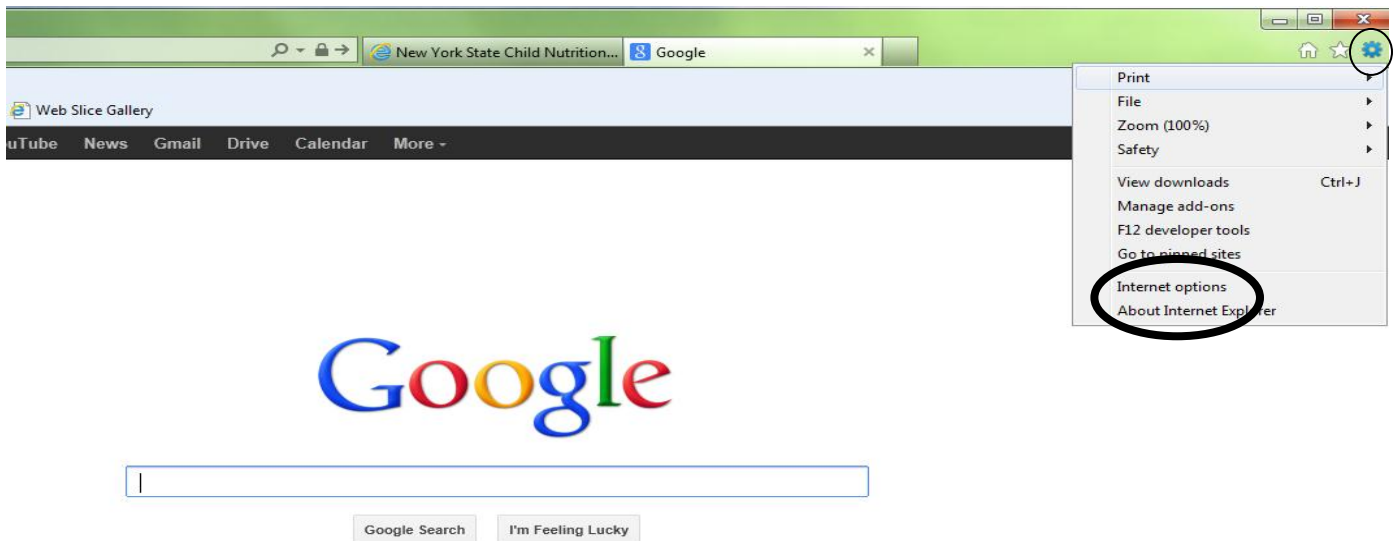


## Instructions for Direct Certification Case Number Search Tools

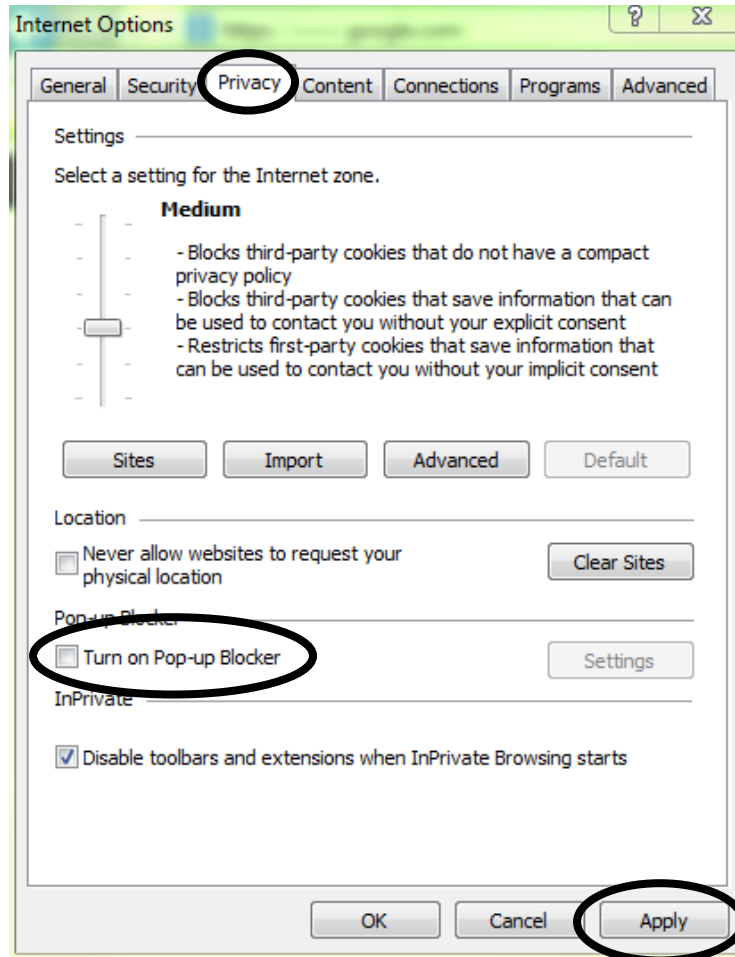
**Updated Database: CNMS passwords will have to be changed if they do not meet the following criteria or if you are denied access to the Discoverer database. Passwords are case sensitive, must be at least 8-12 characters, begin with a letter, and contain at least 1 number.**

1. Prior to starting the process open your web browser (i.e. Internet Explorer). Select *Tools Icon*, then select **“Internet Options.”**



## Instructions for Direct Certification Case Number Search Tools

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.



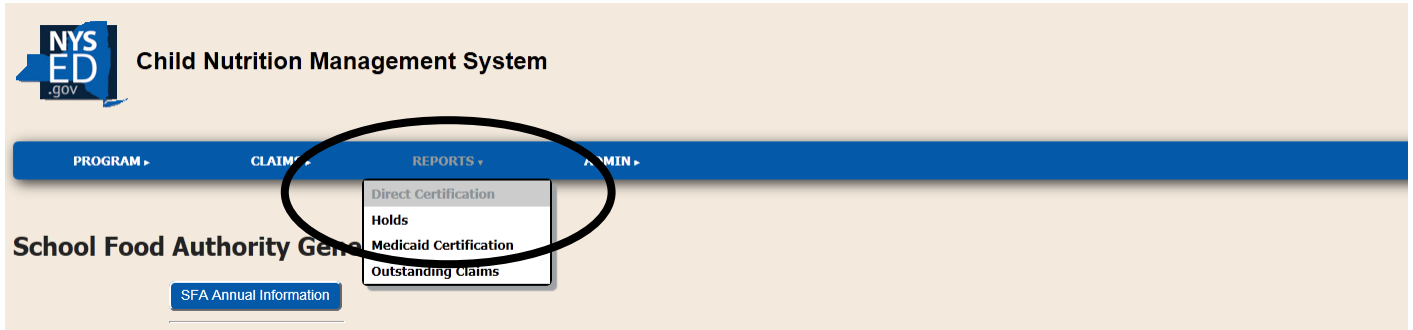
## Instructions for Direct Certification Case Number Search Tools

3. Go to the Child Nutrition Knowledge Center website: [portal.nysed.gov](http://portal.nysed.gov) then click on 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.

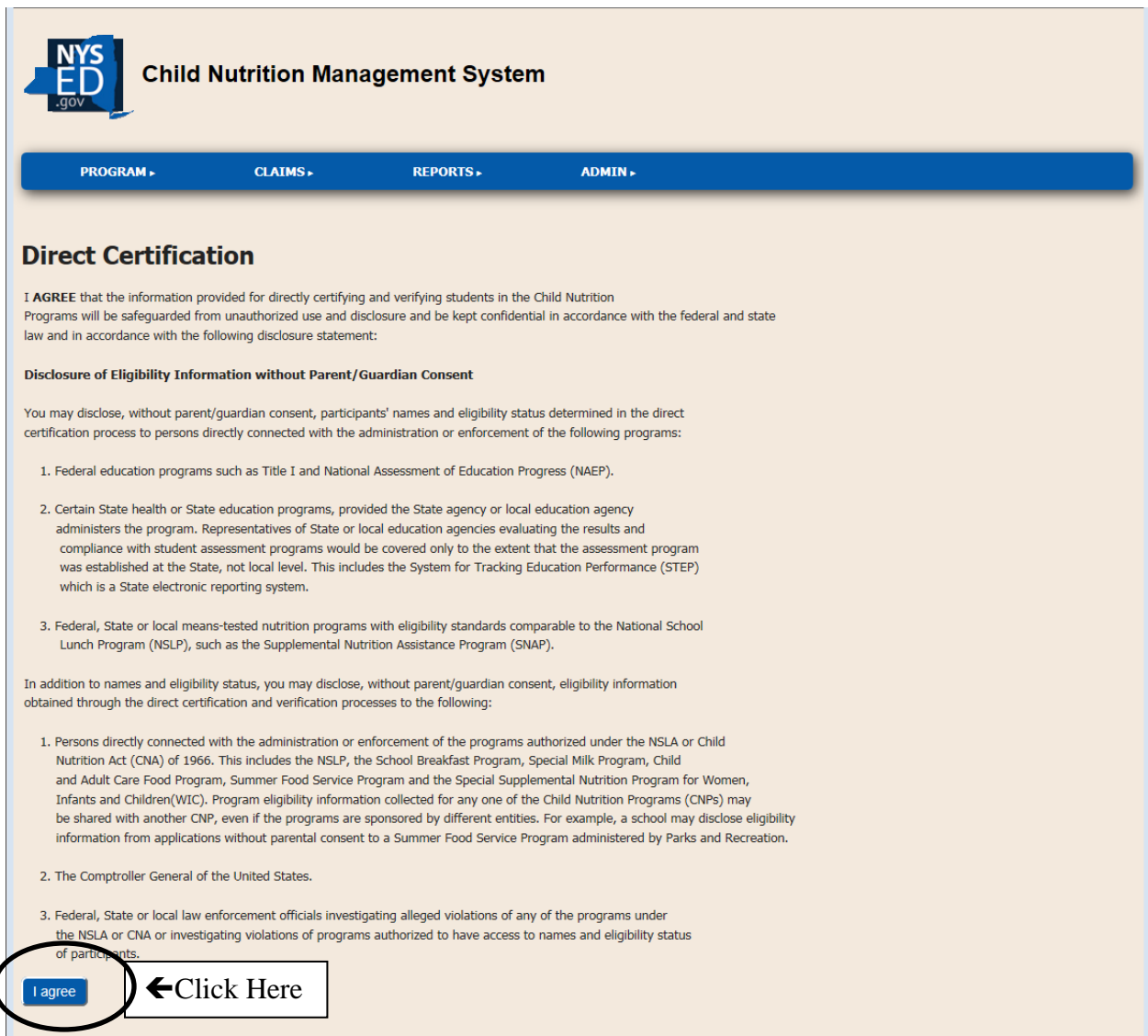
The screenshot shows the NYSED.gov website's Child Nutrition Knowledge Center. At the top, there is a navigation bar with links: [CNMS Home](#), [USDA](#), [Links](#), [Glossary](#), [Annual Checklist](#), [Contact Us](#), [FAQs](#), and [About Us](#). Below this is a search bar and a "Reset Password" link. The main content area features a "Welcome to the Child Nutrition Knowledge Center" message with a large "CNMS" logo and a "Click to Enter" button, which is circled in black. To the left is a vertical navigation menu with categories such as Administrative Review, Eligibility, Food Based Menu Planning, Forms, General Info, HACCP/Sanitation, Holds, Local Wellness Policy, Management Companies, New School Food Authority, Nutrition & Health, Policy & Regulations, Programs, Reauthorization, Reimbursement, Reports, Resources, Reviews, and Summer Food Service Program. The right sidebar contains a "Need to Know" section with a "Summer Food Rocks!" banner, a "Think Breakfast" logo, and several news items including "Direct Certification", "July 2015 SNAP and Medicaid data is now available for the Direct Certification Matching Process", "DCMP Mandatory Reporting Memo (8/15)", "Professional Standards Training Requirements (8/15)", "Professional Standards and Procurement Webinars (8/15)", "2014-2015 Analysis of Cash Resources Report New DUE DATE SEPTEMBER 30, 2015 for all Nonpublic Schools, Charter Schools, RCCIs and Jails (8/15)", "Food Service Equipment Grant FY 2014/CNMS/Equipment Grant Recipients (8/15)", "FFVP Grant Awards 2015-2016 (7/15)", "NEW 2015 - 2016 New SFA and RA Application Process (7/15)", "2015-2016 Adult Selling Prices (7/15)", "Child Nutrition Webinar Wednesdays", "2015-2016 Reimbursement Rates (7/15)", "Professional Hiring Standards for State and Local School Nutrition Programs Personnel (7/15)", "2015-2016 Policy Booklet Memo (7/15)", "2015-2016 Annual Renewal Instructions (6/15)", "2015-2016 Paid Lunch Equity (6/15)", and "Farm to School - Agriculture Literacy Academy (6/15)".

## Instructions for Direct Certification Case Number Search Tools

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



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



## Instructions for Direct Certification Case Number Search Tools

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.**”

ORACLE Discoverer Viewer  
Business Intelligence [Logout](#) [Help](#)

[Connect Directly](#)

### Connect to Oracle BI Discoverer

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

#### Choose Connection

Details	Connection	Description	
<a href="#">Show SAMS</a>		SAMS Discoverer Production Reports	<a href="#">Create Connection</a>
<a href="#">Show SEDREF Admin Reports</a>		SEDREF Admin Reports	<a href="#">Update</a> <a href="#">Delete</a>
<a href="#">Show SEDREF General Reports</a>		SEDREF General Reports	<a href="#">Update</a> <a href="#">Delete</a>

#### Connect Directly

Enter your connection details below to connect directly to Oracle BI 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.

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[About Oracle BI Discoverer Viewer Version 11.1.1.6.0](#)  
[Oracle Technology Network](#)

### 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.

# Instructions for Direct Certification Case Number Search Tools

8. Once you have logged into Discoverer, you will select the “**Direct Certification SNAP/MEDI 2015-16 Case Number Search**” by clicking the *plus sign* (inside of arrow) and then clicking on “**Sheet 1.**”

[Connect](#) >

## Worksheet List

### Search

Type in a search string to find a specific workbook or result set. Use the drop-down menu to choose between Database and Scheduled Workbooks.

Search

### Result List

[Expand All](#) | [Collapse All](#)



**Focus** **Name** **Description**

Discoverer Workbooks

- Direct Certification SNAP/MEDI 2015-16
- Direct Certification SNAP/MEDI 2015-16 Case Number Search**
- Direct Certification SNAP/MEDI 2015-16 DOB Search
- Direct Certification SNAP/MEDI 2015-16 Last Name Search

- Direct Certification SNAP/MEDI 2015-16
- Direct Certification SNAP/MEDI 2015-16 Case Number Search
  - [Sheet 1](#)
- Direct Certification SNAP/MEDI 2015-16 DOB Search
- Direct Certification SNAP/MEDI 2015-16 Last Name Search

Click Here

## Instructions for Direct Certification Case Number Search Tools

9. The following screen should appear. Select “**Preferences**,” which is located in the upper right corner or lower center of the screen.
- 10.

ORACLE Discoverer Viewer  
Business Intelligence

Connect > Workbooks >

### Direct Certification SNAP/MEDI 2015-16 - Sheet 1

Last run Tuesday, August 25, 2015 3:05:43 PM EDT

Worksheets  
Sheet 1

#### Parameters Needed

Select values for the following parameters.  
\* Indicates required field

\* Zip

\* Enter value for Mon YYYY

Go

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Oracle Technology Network

Click “**Preferences**” here  
Or below

11. 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.

Preferences

ORACLE Discoverer Viewer  
Business Intelligence

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

Uncheck Here

time exceeds   
(Enter a value between 1 and 999999 in seconds)

Prevent queries from running longer than   
(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   
(Enter a row limit value between 1 and 10000)

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

Change this number to 60.

Select “Apply”, after adjusting both the “limit retrieved query data” and “cancel list-of-values retrieval after”.

## Instructions for Direct Certification Case Number Search Tools

12. Enter the Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF) or Medicaid case number in the “**Case Number**” field and click “**Go**.”
  - a. Letters are case sensitive. They **MUST** be entered as capitals.
  - b. You can broaden your search by adding “%” (the percentage sign) to the beginning and/or end of the case number.
  - c. 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

ORACLE Discoverer Viewer  
Business Intelligence

[Preferences](#) [Exit](#) [Help](#)

[Connect](#) > [Workbooks](#) >

### Direct Certification SNAP/MEDI 2015-16 Case Number Search - Sheet 1

Last run Tuesday, August 25, 2015 5:13:04 PM EDT

Worksheets  
Sheet 1

#### Parameters Needed

Select values for the following parameters.  
\* Indicates required field

\* Case Number

(Use % as a wildcard.)

[Preferences](#) | [Exit](#) | [Help](#)

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[Oracle Technology Network](#)

13. The following screen should appear. Children with the case number that was queried will be listed.

Actions  
[Rerun query](#)  
[Save as](#)  
[Revert to saved](#)  
[Printable page](#)  
[Export](#)  
[Send as e-mail](#)  
[Worksheet options](#)

#### Parameters

Select values for the following parameters.  
\* Indicates required field

\* Case Number

(Use % as a wildcard.)

---

Worksheets  
Sheet 1

#### Table

Tools [Layout](#) [Sort](#) [Rows and Columns](#)

Page 1 of 10

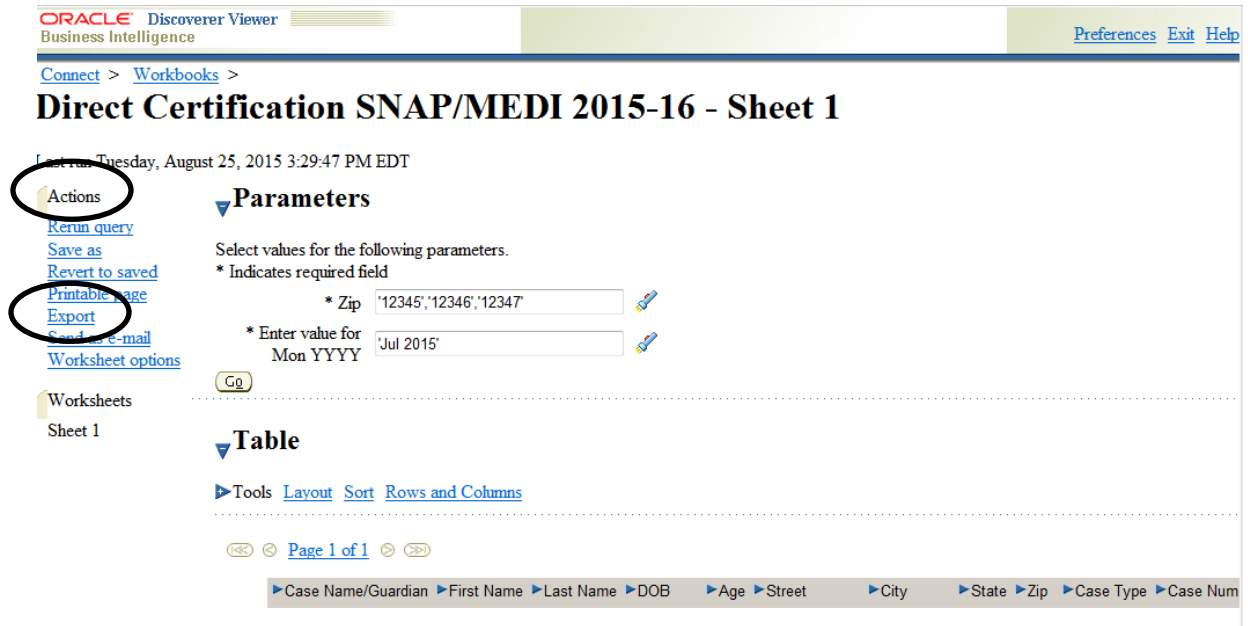
Up 25 Rows Down

Case Name/Guardian	First Name	Last Name	DOB	Age	Street	City	State	Zip	Case Type	Case Num
1	APPLE JAMES	MACK	APPLE	01/01/2003	12	123 UNKNOWN	ALBANY	NY 12345	MEDICAID	M012345

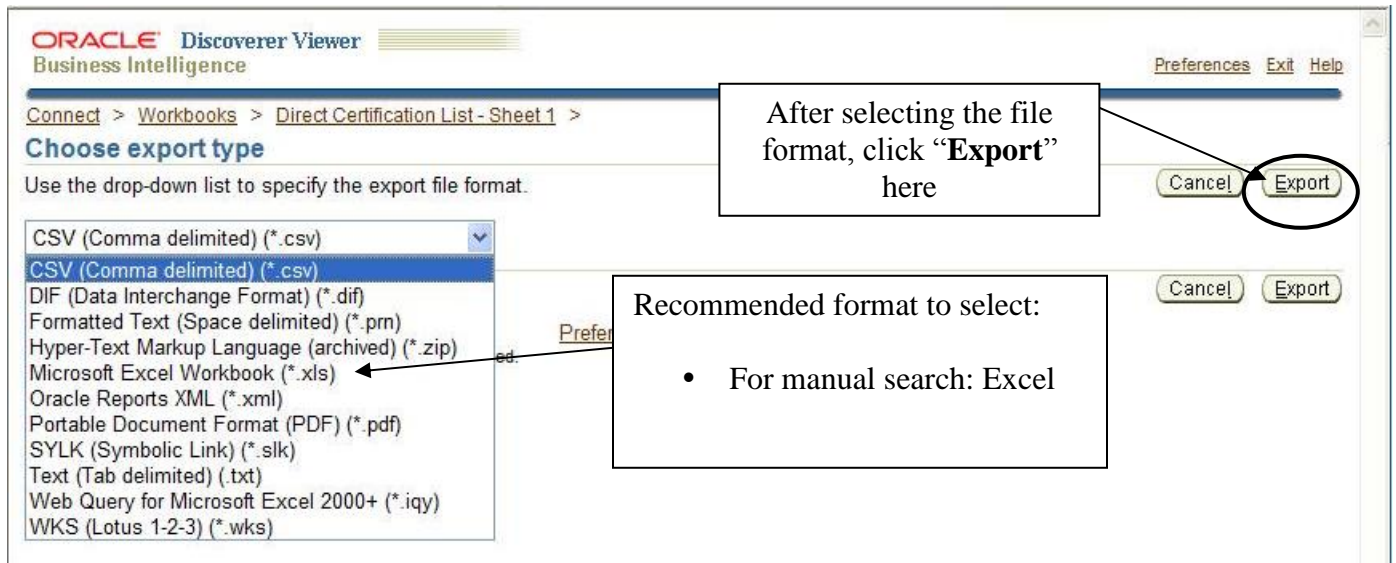


## Instructions for Direct Certification Case Number Search Tools

14. Click “Export” under the “Actions” list.

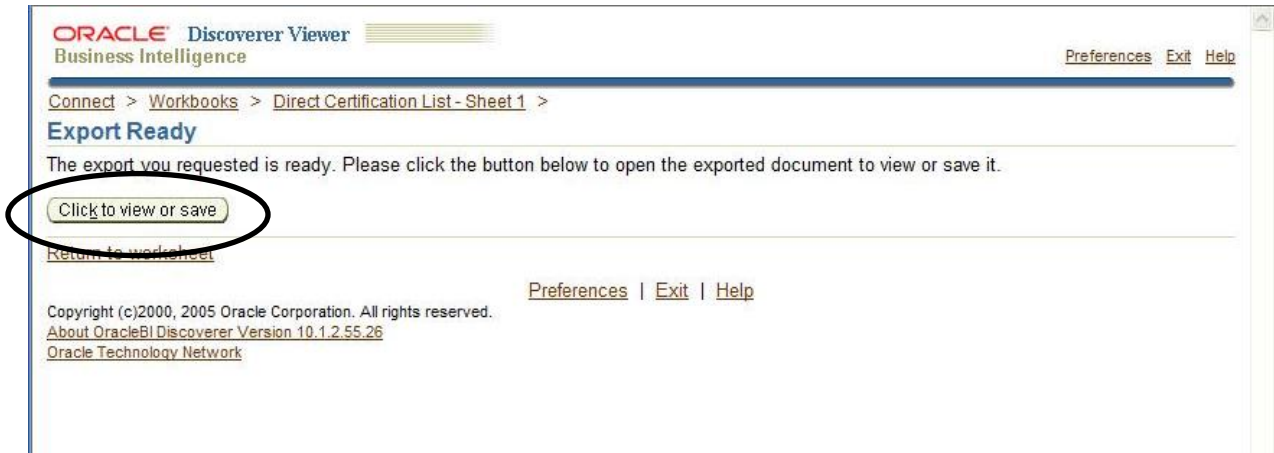


15. The following screen should appear. Use the drop-down list to specify the export file format. Select the **Microsoft Excel Workbook** to manually search for children, then click “Export.”

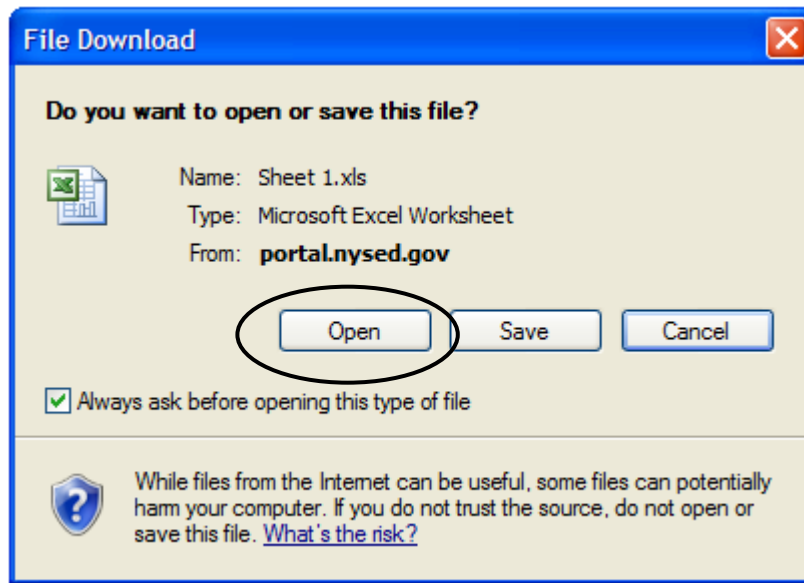


## Instructions for Direct Certification Case Number Search Tools

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



17. The following screen will appear. Click “Open.”



## Instructions for Direct Certification Case Number Search Tools

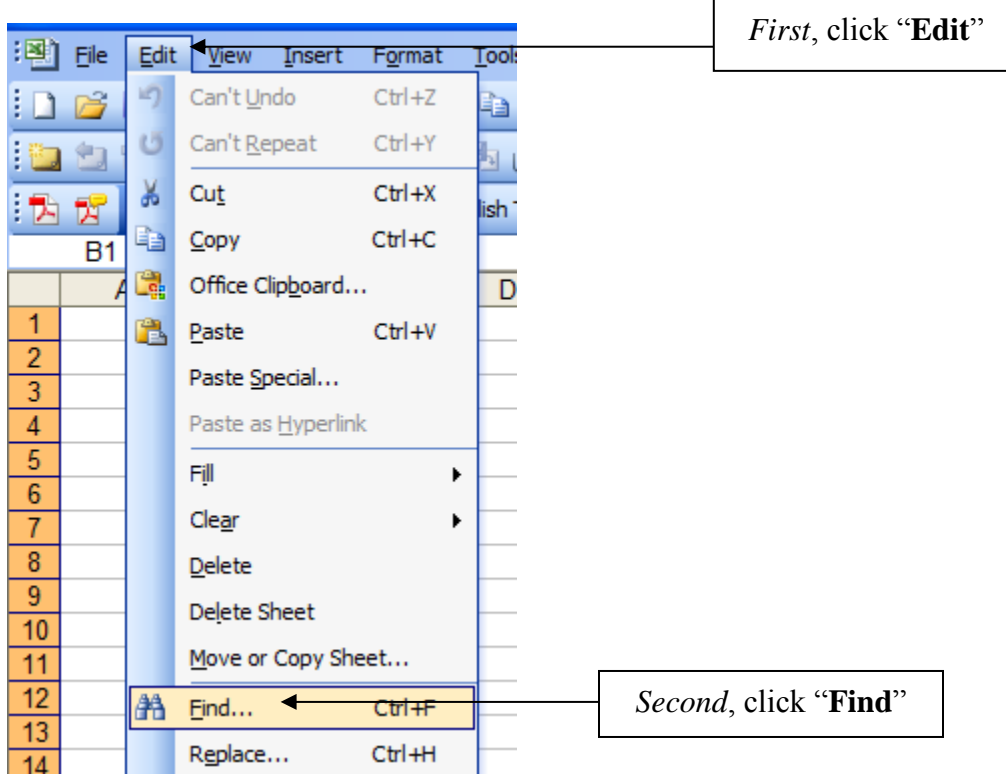
18. An excel sheet will be generated, as shown below.

The screenshot shows a Microsoft Excel spreadsheet titled "SAMPLE DATA NUTRIKIDS 1.xls". The spreadsheet contains a table with 17 rows of data. The columns are labeled as follows: A (Last name), B (First name), C (Mi), D (Dob), E (Street), F (City), G (State), H (Zip), I (Age), J (Case name/Guardian), and K (Case num). The data is as follows:

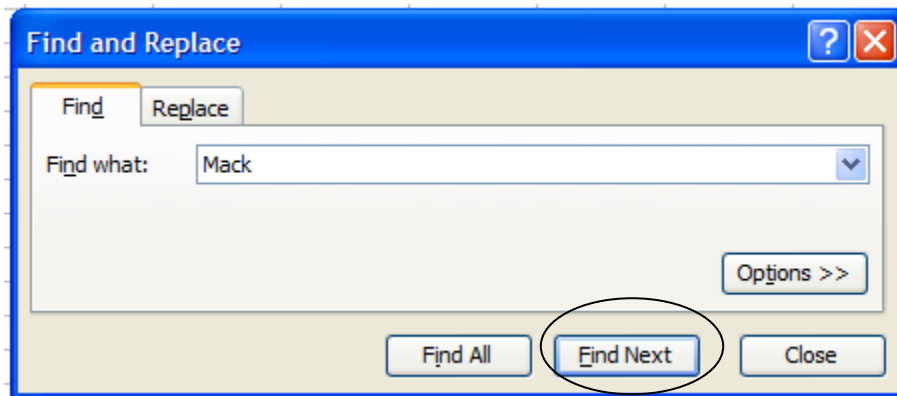
	A	B	C	D	E	F	G	H	I	J	K
1	Last name	First name	Mi	Dob	Street	City	State	Zip	Age	Case name/Guardian	Case num
2	APPLE	MACK	J	8/4/2002	11 CORTLAND ST	FORT ORANGINY		12345	8	APPLE/JAMES	F000001
3	APPLE	TOSH	J	1/14/1998	11 CORTLAND ST	FORT ORANGINY		12345	13	APPLE/JAMES	F000001
4	BACH	SUSAN	F	7/2/1992	2 MOZART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

## Instructions for Direct Certification Case Number Search Tools

19. Once the column is highlighted in blue: click **“Edit”**, then click **“Find.”**



20. The following will appear, and you can search by first or last name or case number here. After typing the name, click **“Find Next”** to scroll to the next name.



## Instructions for Direct Certification Case Number Search Tools

21. When you find the student you are searching click the row number to highlight the entire row. You can then copy and paste this row (student information searched) into the documentation you have currently saved for the Direct Certification Matching Process.

The screenshot shows a Microsoft Excel spreadsheet titled "SAMPLE DATA NUTRIKIDS 1.xls". The spreadsheet contains a table with 17 rows of student data. The columns are labeled A through K. Row 2 is highlighted, and a callout box points to the row number '2' with the instruction: "Click the row number to highlight the entire row. Then right click with your mouse to copy the".

	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	APPLE	MACK	J	8/4/2002	11 CORTLAND ST	FORT ORANGINY		12345	8	APPLE/JAMES	F000001
3	APPLE	TOSH	J	1/14/1998	11 CORTLAND ST	FORT ORANGINY		12345	13	APPLE/JAMES	F000001
4	BACH	SU			2 MOZART AVE	FORT ORANGINY		12345	18	BACH BRITNEY	F577777
5	CURRY	RO			P O BOX 5555	FORT ORANGINY		12345	5	SAGE SANDY	F288888
6	DENNY	PE			21 DINER DR	FORT ORANGINY		12345	6	NICKS JOAN	F411111
7	DENNY	RO			21 DINER DR	FORT ORANGINY		12345	7	NICKS JOAN	F411111
8	EVANS	EN			1222 BROADWAY	FORT ORANGINY		12345	11	JOHNSON TERI	F799999
9	FAME	PF			99 STAR PKWY	FORT ORANGINY		12345	16	FAME VICKI	F200000
10	GOLF	TA			540 FAIRWAY DR	FORT ORANGINY		12345	15	GOLF TAYLOR	F433333
11	GOLF	TI			540 FAIRWAY DR	FORT ORANGINY		12345	9	GOLF TAYLOR	F433333
12	GOLF	PHIL	Z	5/29/2003	540 FAIRWAY DR	FORT ORANGINY		12345	8	GOLF TAYLOR	F433333
13	HOPEWELL	KERI	P	10/10/1999	1B ROCKBRIDGE WAY	FORT ORANGINY		12345	11	HOPEWELL FAITH	F000005
14	ION	ADAM	Z	6/9/1995	100 CHARGED AVE	FORT ORANGINY		12345	16	ION JESSE	F111119
15	JONES	LILLY	E	7/15/1995	8 PADDY PL	FORT ORANGINY		12345	15	SMITH DANA	F888888
16	KLEIN	BECKY	M	6/13/1998	44 MAIN ST APT 1	FORT ORANGINY		12345	13	KLEIN NATE	F455555
17	LEOPARD	GABE	M	9/10/2005	1818 BROADWAY	FORT ORANGINY		12345	5	LEOPARD JESSICA	P111117