

Direct Certification : Matching enrollment records against Food Stamp (SNAP), TAFI (Temporary Assistance for Families in Idaho), and FOSTER (Court Ordered) records



Child and Adult Care Food Program (CACFP) Summit
Idaho State Department of Education
Child Nutrition Programs
August 21-22, 2014
Boise, ID
TJ Goodsell



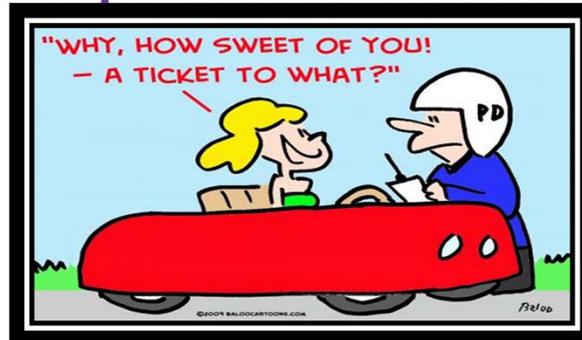
Welcome to this session on the Direct Certification (DC) matching system.

My name is TJ Goodsell.

[Collect Attendee Passports before beginning the training. Stamp and return Passports before the end of each session.]

[Set up a Post It poster sheet with a parking lot for any questions that may come up that the trainer does not know the answer.]

Experience vs. Wisdom



People often say
"Experience is the Best Teacher"
but in all actuality
"Wisdom is a better teacher"

Let me explain with an analogy we can all probably relate to:

Kim and I are driving down I-84, but Kim is running a bit late for the CACFP Mandatory training and has decided to engage her lead foot! Upon surpassing the posted speed limit by nearly 10 miles an hour, she has put a good two miles between her and I, when suddenly behind her those infamous red and blue lights begin to dance! Now, if I were to rely on "experience being the best teacher", I too, would stomp on the gas, try to outrun a hidden officer and expect to learn not to speed by receiving an \$85 ticket, potential hit to my insurance, and a significant delay in my arrival to the CACFP training. Instead, I prefer to gain wisdom from observing Kim's error! I will keep my lawful pace and arrive to the meeting perhaps just a few moments behind schedule, but my wallet, my insurance provider, and my husband will thank me.

Topics

- Why Direct Certification
- Direct Certification User Manual
- State Agency Recommendations For Use
- Excel vs. CSV
- Best Practices
- Pre and Post Assessments

During this session we will cover the following topics:

We'll take a look at the key benefits for using the Direct Certification system and get a quick peek at the revised Direct Certification User Manual. You'll learn about the state agencies recommendations for timely use of the system, the differences between Excel files and CSV files and the relevance to successful use of the system. We'll identify some Best Practices and discuss the value of assessments for adult learners.

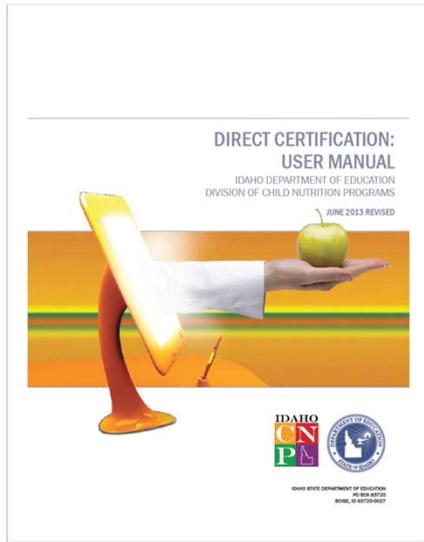
What do sponsors gain? What do your clients gain?

- Applied Knowledge is Power!
- Reduced Paperwork
- Potential Higher Reimbursement
- Reduced Impact on Clients
- Possible Additional Benefits to Household Members

Let's get started! Why are you here today learning about Direct Certification? Here is a shortlist of benefits...

1. You've gained knowledge and **applied** knowledge is POWER!
2. Your center or home has less paperwork (fewer eligibility forms to print, send home, and process)
3. Higher Rate of reimbursement anyone? (How does that happen?) Students paid at the free rate when
Directly Certified – no waiting for caregivers to return forms, etc
4. Families who have chosen YOU to care for their little ones, have less paperwork and can avoid having to
provide confidential information because no Income Eligibility Form is needed when a child is
matched through the Direct Certification system.
5. Additional family members (school aged children) would also qualify for free meals based on matching

Direct Certification: Web application used to certify children for the Free and Reduced Meals Program



Direct Certification: User Manual

Idaho CNP website:

www.sde.idaho.gov/site/cnp



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In June 2013 the state agency released a revised Direct Certification User Manual. This resource complements the training you will receive today by providing 36 pages of detailed instructions (along with step by step screen shots).

The manual is available on the Idaho Child Nutrition Programs website.

[Hand out copies of the Direct Certification User Manual]

We can see you...

- State agency access allows us to monitor usage

District/LEA	List Name	Type	Created	Matched	Submitter	Total	Certified	Possible
		✓	✓	✓		127	28	2
	Test list for	User Upload	6/18/2014 12:46:51 PM	6/18/2014 1:05:40 PM		127	28	2
		✓	✓	✗		132	5	2
	cnp2013-14	User Upload	9/6/2013 1:24:41 PM	11/14/2013 4:42:12 PM		132	5	2

Uploaded CSV Template



Submit for Matching

Possible Higher Reimbursement

List Information

My DC Template as CSV successfully created.

Submit for Matching Edit List Name Delete List

Name: My DC Template as CSV

Status: Created

Created: 8/6/2014 11:45 AM

Matching Completed: Not matched yet

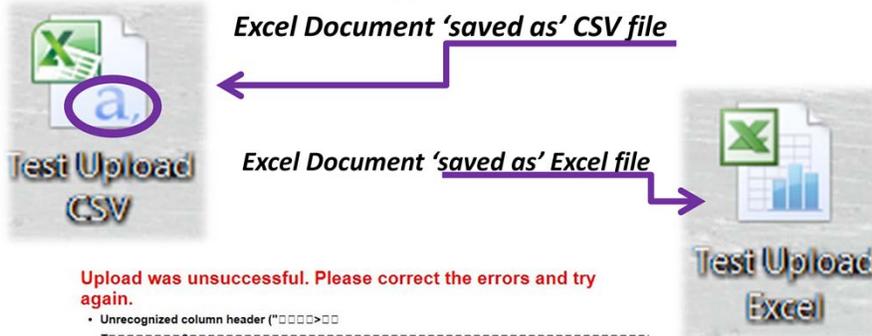
Created by: cnp@testrole.org

List Source: User Upload

We have designed the Direct Certification system with edit checks that allow the state agency to confirm usage. There are mandatory requirements for National School Lunch Program sponsors which do not apply to CACFP, however, your organization will now be monitored for compliance to usage at least one time per year. These reports will be accessed prior to a review so please make sure you follow the guidelines given during this CACFP Summit.

It is essential to follow all steps when uploading your match list – particularly the “Submit for Matching” once your list is successfully uploaded. You can see from the example shown that one user created an upload on 9/6/2013, however, did not “Submit for Matching” until 11/14/2013 so all the children who may have been eligible for benefits were not identified. This mistake could cost you valuable reimbursement funds. Direct Certification allows you to receive reimbursement at the free rate for all children “matched” in the system – even if your parent-completed form indicates differently and even if a parent has chosen not to complete/sign a form.

One of these things is not like the other...



Upload was unsuccessful. Please correct the errors and try again.

- Unrecognized column header ("<code>T</code>") encountered.
- Unrecognized column header ("<code>g2</code>") encountered.
- Unrecognized column header ("<code>8</code>") encountered.

Upload Information
List Name: My DC Template (not CSV)

As most of you have learned, there are some key characteristics about using the Direct Certification matching system. You should all be familiar with the Excel template that is used to organize your enrollment data and then uploaded for the matching process – you submitted a copy for my review. This software requires very precise file types and one of those is known as a CSV file. A CSV file delineates columns differently than an excel file. What does that mean to you? You must convert your Excel enrollment list to CSV before uploading into the Direct Certification system or your upload will fail.

Although the ‘error’ code indicates “Unrecognized column header” – this error results from the file being uploaded as an excel file not a CSV file.

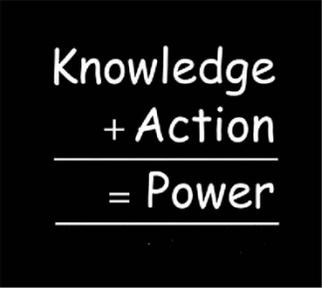
Best Practices

- Read the Direct Certification Manual
- Strongly Recommend using DC at Least Annually
- Run Your DC Prior to New Enrollment Period
- Title Your Upload List Correctly
- Print Match Report
- Further Explore Possible Matches
- Eligibility Begins Day One of The Match Month

1. Thoroughly read through the provided Direct Certification User Manual for information retention (aka learning) and we included pretty colors and great photos just for fun!
2. As previously mentioned your usage will be monitored and you will be asked to provide documentation of usage when being reviewed. Upload match list prior to your organizations annual **participant eligibility** process. Use Single match process with each newly enrolled child.
3. When do you collect new enrollment and eligibility information? Set a task for the 1st day of the month you begin this process and run your DC.
4. Add a date and CSV to the document title to ensure you are uploading the correct list.
5. Print Match Report to PDF and save in electronic filing system (should be easily retrievable by reviewers) OR Print hard copy, scan and save to file OR Print hard copy and retain with Income Eligibility Forms (You must ensure the current date is on the match report)
6. Possible Matches result from having insufficient data to directly certify a child. More information is needed on the child to assure that the child should be directly certified. In no case should a 'possible match' child be certified until (and if) additional data can confirm a match.
7. **Once a match is made, it is effective for one year. In CACFP a child matched on August 21, 2014 is eligible at the free status for the month of August 2014 to August 31, 2015.**

Pre and Post Assessments

- Pre Assessment - Thank you! A baseline for current understanding of DC.
- Post Assessment – Thank you again! Gauge for competency and understanding. The link will be sent to you via email. Please complete within 15 business days.



Knowledge
+ Action
= Power

A Pre assessment was sent to give us some idea of what you may already know about the DC process.

The post assessment helps us evaluate the time you have spent in training. Did we provide thorough instruction and honor your time? By completing the post assessment for this training, you will increase your level of retention giving you the power to increase your reimbursements.

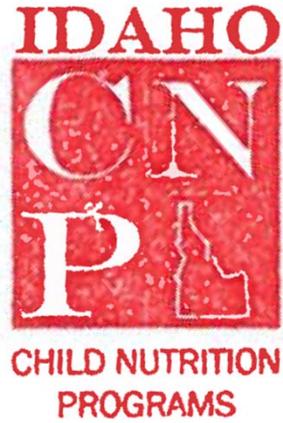
Thank you for your time!

Wrap Up

Get your passport stamped
before you leave!

Remember to complete the
evaluation.

Thank you!



I hope you have found this session helpful. Please make sure I have stamped your passport before you leave this session. Remember to complete the evaluation. Also, please leave any CNP resources here.

Direct Certification: Web application used to certify children for the Free and Reduced Meals Program

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