

Direct Certification Module in the Colorado Nutrition Portal Enrollment File Upload Instructions

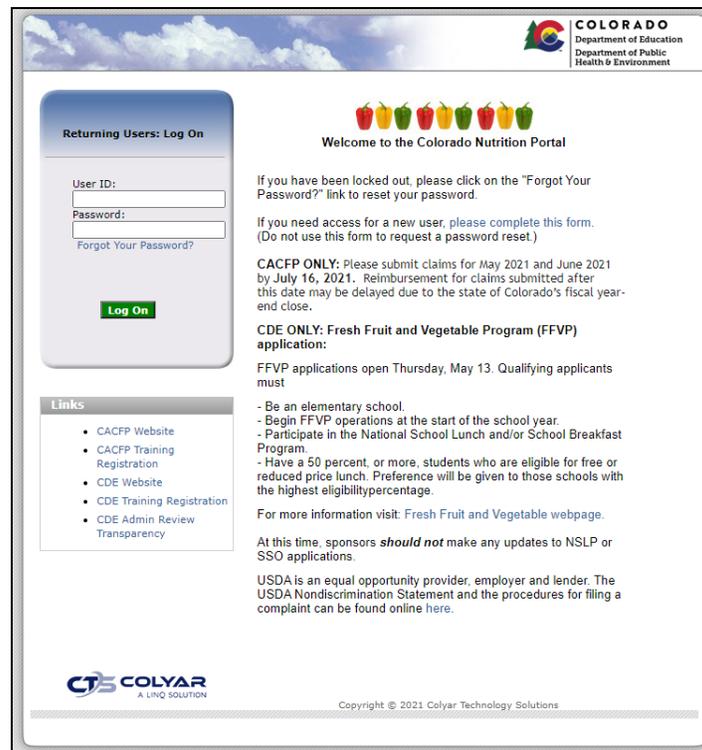


Direct Certification Access and System Navigation

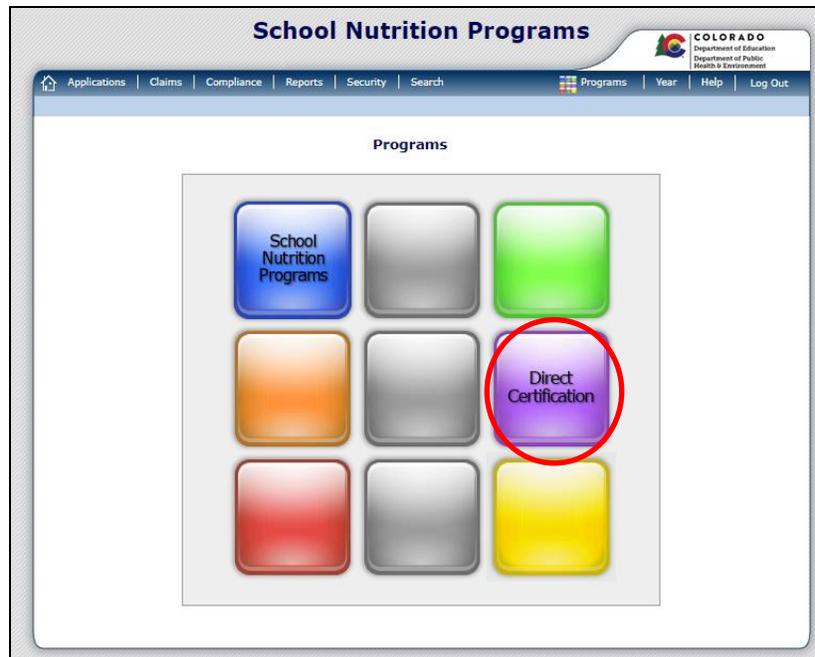
To access the direct certification system within the Colorado Nutrition Portal (commonly referred to as “The Portal”), go to: <https://co.cnpus.com/Colorado/Splash.aspx>

To request access to The Portal, please complete the [New User Setup Request form](#). You will need to specify that you need access to the Direct Certification module in your request.

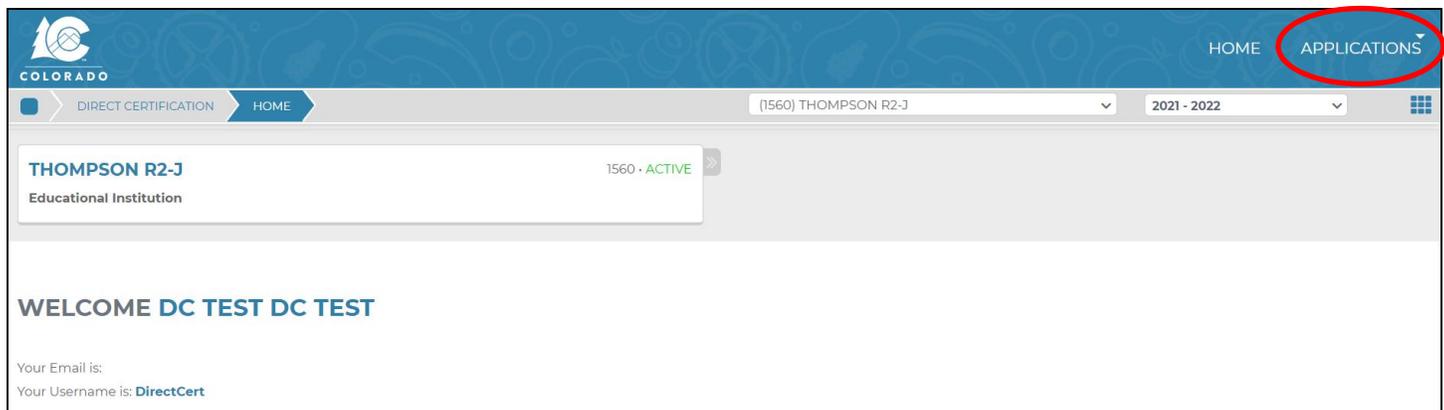
The Portal Login/Home Page:



Once you have logged into the system, if you have access to programs other than School Nutrition Programs (i.e.: Direct Certification access), you will see this page. Click on the purple Direct Certification tile:



Clicking the purple tile will take you to the Direct Certification module. The screen will show your username and the district/sponsor you are assigned. If you perform direct certification duties for multiple districts/sponsors, you can select which district/sponsor you wish to operate on behalf of by using the dropdown menu at the top of the screen. To access the direct certification functions, select "Direct Certification" from the Applications drop down menu at the top right of the screen:



Uploading a Student File

Format student enrollment file according to the upload file layout requirements (<https://www.cde.state.co.us/nutrition/dcrecordlayout>). If needed use the conversion formula instructions (<https://www.cde.state.co.us/nutrition/dconversionformula>) to convert the excel file to a .txt file. Save the correctly formatted .txt file.

Once in the Direct Certification screen, click on *Student File Upload*. The screen will expand and allow you to browse your computer for your student enrollment file. Click *Choose File* to select the correct file. Then, click *Upload*:

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THOMPSON R2-J 1560 - ACTIVE
Educational Institution

DIRECT CERTIFICATION: PROGRAM YEAR 2021 - 2022

Notice: All users of this system must adhere to Section 9(b) of the Richard B. Russell National School Lunch Act (NSLA) (42 U.S.C. 1758(b)(6) which delineates the restrictions on the disclosure and use of information obtained through the direct certification process, as well as the criminal penalties for improper release information.

ADD INDIVIDUAL STUDENT | **STUDENT FILE UPLOAD** | ADMINISTRATION

Last DSS Source File: 6/28/2021 12:00:00 AM
Last LEA Student File Upload: 7/6/2021 4:33:58 PM

Student File Upload

Choose File No file chosen **UPLOAD**

CANCEL VIEW LATEST UPLOADED DATA

The system will process the upload and once complete a pop up will appear confirming receipt of the enrollment file. The pop up will address any errors in the file and will also show you a preview of your uploaded students. **If you get errors while uploading, refer back to the record layout to ensure you have properly formatted the columns. Try to fix the errors, rename the text file and re-upload. If you cannot fix the file, contact School Nutrition for assistance.** If the file upload was successful and without error, click *Save*.

Direct Certification List

Once you click *Save* in the upload pop up, you will be taken back to the Direct Certification list. All students from the enrollment file who matched against CO Department of Human Services (CDHS) and/or Migrant data will display automatically in the list shown below. All these children are 100% matches and can be approved for free school meal benefits immediately. You can filter the list by upload date as well. In the top right corner, you will see a dropdown menu. You can see a direct certification list by a specific upload date or by all dates combined. Next, click on *View Additional Possible Matches*:

COMPLETE DIRECT CERTIFICATION LIST All Dates

FILTERED SEARCH
Displaying top 10 records. For full list, please Export. Total Records: 29

Student ID First Name Last Name DOB Eligibility Type SEARCH

Action	Student ID	First Name	Last Name	Sex	DOB	Site ID	Site Name	Eligibility Type
🗑️	123457	Kathleen	DelTonto	F	2007-01-16			SNAP
🗑️	123458	Shari	Edwards	F	2007-09-01			SNAP
🗑️	123459	Michelle	Eveatt	F	2007-02-08			SNAP
🗑️	123461	Carla	Herman	F	2007-10-14			SNAP
🗑️	123462	Laurie	Hyllie	F	2007-07-05			SNAP
🗑️	123463	Jean	Kenney	F	2007-04-01			SNAP
🗑️	123465	Amy	Navarette	F	2007-11-27			SNAP
🗑️	123468	Chuck	Soukup	M	2007-01-14			SNAP
🗑️	123470	Kate	Thompson	F	2007-11-14			SNAP
🗑️	123472	Rebecca	Walters	F	2007-10-02			SNAP

Excel EXPORT **VIEW ADDITIONAL POSSIBLE MATCHES** VIEW EXTENDED ELIGIBILITY MATCHES

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View Additional Possible Matches

Possible matches are students who are likely matches but have a slight variation in detail between your upload file and the state records (such as a hyphen or space in their last name). **All names on the list must be reviewed**, all the way down to the 37% likelihood.

Investigate if each record on the Additional Possible Matches list has enough information to conclude the CDHS student and/or Migrant student listed is the same student as the uploaded student. To do this, click *View Matches* next to a student name. The blue lines are student data uploaded by you, the white lines are CDHS/Migrant data the system is trying to match to. If the line containing the Colorado record information is consistent with the student on your enrollment file and you are confident it is the same individual, click the *Match* box next to the student's name. If you are confident it is not the same individual, remove the student from the Additional Possible Matches list by clicking the black **x** on the blue line:

Row	Source	Match	Score(%)	First Name	Last Name	Sex	DOB	City	Zip Code
Student Information		View Matches		Alan	150Dillon	M	2007-12-28	DeBeque	81630
Source Information		<input type="checkbox"/> Match	76.12%	Alan	Dillon	M	2007-12-28	DeBeque	81630

If you select the hyperlinked name from the white line, you can view more information in the *Individual Student Information* pop up:

INDIVIDUAL STUDENT INFORMATION

STUDENT DETAILS

Student ID:	53151	Match Source:	Federal File
Name:	Alan 150Dillon	Source Name:	Alan Dillon ?
Sex:	M	Source Sex:	M ✓
Date of Birth:	2007-12-28	Source Date of Birth:	2007-12-28 ✓
Residential Address:	730 Minter Avenue DeBeque, 81630	Source Address:	730 Minter Avenue DeBeque, 81630
Sponsor:	THOMPSON R2-J		
Site:		Matching Criteria:	First Name Exact ✓
			Last Name ?
			Birthdate ✓
			Sex ✓
Match Percentage:	76.12		Zip Code ✓

Once you determine an additional possible match is indeed a match and confirm it via the *Match* checkbox, the student automatically gets added to your match list. Once you have gone through all your additional possible matches, you now need to click on *View Extended Eligibility Matches*:



COMPLETE DIRECT CERTIFICATION LIST All Dates

FILTERED SEARCH
 Displaying top 10 records. For full list, please Export. Total Records: 29

Student ID: First Name: Last Name: DOB: Eligibility Type:

Action	Student ID	First Name	Last Name	Sex	DOB	Site ID	Site Name	Eligibility Type
<input type="button" value="🗑"/>	123457	Kathleen	DeTonto	F	2007-01-16			SNAP
<input type="button" value="🗑"/>	123458	Shari	Edwards	F	2007-09-01			SNAP
<input type="button" value="🗑"/>	123459	Michelle	Eveatt	F	2007-02-08			SNAP
<input type="button" value="🗑"/>	123461	Carla	Herman	F	2007-10-14			SNAP
<input type="button" value="🗑"/>	123462	Laurie	Hylle	F	2007-07-05			SNAP
<input type="button" value="🗑"/>	123463	Jean	Kenney	F	2007-04-01			SNAP
<input type="button" value="🗑"/>	123465	Amy	Navarette	F	2007-11-27			SNAP
<input type="button" value="🗑"/>	123468	Chuck	Soukup	M	2007-01-14			SNAP
<input type="button" value="🗑"/>	123470	Kate	Thompson	F	2007-11-14			SNAP
<input type="button" value="🗑"/>	123472	Rebecca	Walters	F	2007-10-02			SNAP

Excel

View Extended Eligibility Matches

Extended eligible records are students who share the same household address as a student that has been directly certified during your upload process. All names on the list *should* be reviewed but we realize your benefit issuance software may have the same functionality. We do recommend extending eligibility within the system for ease of documentation purposes.

Excel

EXTENDED ELIGIBILITY MATCHES
 SFA must certify the matches. Click on the "Match" box when you determine if the record matches or not.

Search:

Showing 1 to 2 of 2 entries

Row Source	Match	First Name	Last Name	Address Line 1	Address Line 2	City	Zip Code
Directly Certified Student	<input type="button" value="View Matches"/>	Becky	Schiola	1405 Grand Ave.		Glenwood Springs	81601
Extend Eligibility	<input type="checkbox"/> Match	Michelle	Hammons	1405 Grand Ave.		Glenwood Springs	81601
Directly Certified Student	<input type="button" value="View Matches"/>	Kate	Thompson	1502 S. Timberline Rd		Fort Collins	80524

Previous Next

Excel

Investigate if each record is an extended eligible match. It is highly recommended you utilize your student information system or student records to confirm they are in fact in the same household. To do this, click *View Matches* next to a student name. The yellow lines are student data uploaded by you, the white lines are student records the system is trying to match to. If the students are in the same household select the, *Match*, box next to the student's name. If you are confident it is not the same individual, remove the student from the Additional Possible Matches list by clicking the black x on the blue line.

Individual Student Lookup

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The system has the ability to look up individual students. This can be helpful to lookup students one by one instead of doing a full upload. It's also very helpful to lookup any Supplemental Nutrition Assistance Program (SNAP) or Temporary Assistance for Needy Family (TANF) case number applications.

To access the individual student lookup select, Add Individual Student.

 **DIRECT CERTIFICATION: PROGRAM YEAR 2021 - 2022**

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It's best to search by student first name, last name and date of birth (MM/DD/YYYY). Enter the student information and then select, Add Student. If you're searching by case number it's highly encouraged to search by the case number only. If the case number is found the system will produce the student record that is associated with that case number. In either case of searching by student name or case number, you will want to ensure the record is a match. You can do this by clicking on, View Match. If the student is a match, select the, Match, box.

ADD INDIVIDUAL STUDENT

Please note that enough information must be entered in order for the system to be able to perform and return a match. Records with less than a 37% chance of being a match will not be displayed.

Note: Initial matching occurs against existing certified students and possible match students

* indicates a required field for additional matching against Source data. A minimum of 1 required field is needed to match against Source data.

STUDENT INFO

First Name* Last Name* Case Number*

Date of Birth* Sex

Address 1 Address 2

City State Zip Code

Parent / Guardian First Name Parent / Guardian Last Name

ADD STUDENT

Export Matchlist

Once you have uploaded your file, reviewed additional possible matches and extended eligible matches you can export your full matchlist. Select the grey, Export, button at the bottom of the screen and the system will produce and excel/CSV file.

Most benefit issuance software has a feature that will import this exported matchlist file. Work with your vendor to correctly map your system to the matchlist export report.





Next Steps

You're not done yet! As a reminder, be sure to:

- Keep the list of matches (either printed or saved electronically) and keep this information confidential and secure
- Update students' statuses to Free – Directly Certified and include qualify type (SNAP, TANF and/or MIGRANT)
- Notify households

Uploads must be completed four times per year:

- At the beginning of the year
- End of October
- Mid-November to mid-December
- Mid-February to mid-March

Resources

Uploading Resources: <https://www.cde.state.co.us/nutrition/schoolmealeligibility>

Online Training:

<https://www.cde.state.co.us/nutrition/professionaldevelopment/detailondemand/directcertificationonline>

Questions, email: free&reducedpriceschoolmeals@cde.state.co.us