

Below is the procedure for downloading the file containing the list of students that are Directly Certified for your district from the TX-UNPS system. The instructions are based on version 1.0 of the TX-UNPS "School Nutrition Programs Direct Certification Supplemental Manual" which may be downloaded from http://squaremeals.org/vgn/tda/files/2348/44668_2011-04-15%20TX-UNPS%20DCDV%20Supplemental%20User%20Manual%20-%20FINAL%20V1.0.pdf (Link verified on August 2, 2011)

This process is usually performed on the PC of the person who was full access to the Direct Certification section on the TX-UNPS website. There are two people in each district that Texas Department of Agriculture gives this access to.

The file must be downloaded to your PC into the C:\DC directory and then transferred to your Systems Design POS server. The initial Direct Certification file (July or Year-to-Date) must be processed prior to processing applications for the current year and updated monthly as new students are added by the State.

1. Open Internet Explorer.
2. Go to the TX-UNPS Login Page - <https://txunps1.texasagriculture.gov/TXUNPS/Splash.aspx> (Page 2 of the Supplemental Manual give a different URL but it does not appear to work per the instructions.)
3. Login with your user name and password. (Page 3 of the Supplemental Manual)
4. On the blue menu mar, select **Applications**. The Application menu screen displays. (Page 9 of the Supplemental Manual)
5. On the menu, select **Direct Certification/Direct Verification**. The Direct Certification/Direct Verification screen displays. (Page 10 of the Supplemental Manual)
6. After selecting the Direct Certification/Direct Verification link, a new browser window will open displaying the Direct Certification/Direct Verification Home Page.
7. Click the Direct Certification link in the upper left corner to proceed to the Direct Certification screens.
8. If you are a CE user only associated with one Contracting Entity, the Contracting Entity ID, Contracting Entity Name and CD Code fields will be pre-populated. Proceed to step 10.
9. If you are a CE user with access to multiple Contracting Entities, or if you are an ESC user, the Contracting Entity ID field will be blank. Enter the 5-digit CE ID you wish to access and click the Tab key. The Contracting Entity Name and CD Code will populate based on the entered CE ID. If you enter a CE ID that is not associated with your user account, you will receive an error message.
10. Select the type of Direct Certification List you want to access.
 - o **(RECOMMENDED)** Select the "Year to Date List" checkbox to access a comprehensive list, which includes all records released during the current school year. *(Selecting this option to catch students who entered the district after they appeared on the Direct Cert. List.)*

OR

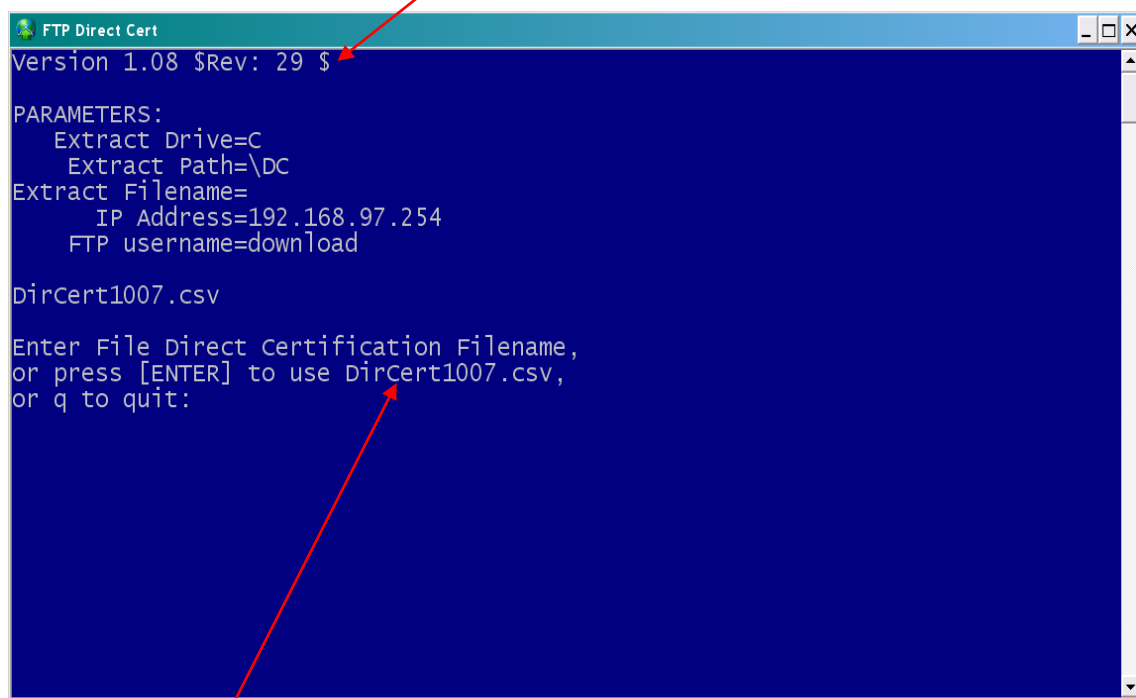
- o Select a month from the "Update Period" drop-down list to view only records released during a specific month. *(We do NOT recommend this option.)*
11. After entering a CE ID (if applicable) and selecting a Report Parameter, click the Download button. A pop-up box appears asking if you want to open or save the file. Click "Open". The requested Direct Certification list will display on the screen in Excel. (Page 12 of the Supplemental Manual)
12. If using a version of Excel prior to 2007, use the following steps to save the file. If using Excel 2007 or later, skip to step 13.
 - o Once the file opens in Excel, click "File--Save As". Select a proper destination directory (C:\DC) to download the list of eligible students for Direct Certification. Enter a file name.
 - o You need to save it as a comma delimited file, click the "Save as type" drop-down and select "CSV (Comma delimited)". After clicking Save, a pop-up box appears asking about feature compatibility. Click "Yes" to continue saving as a CSV file.
13. If using Excel 2007 or later, use the following steps to save the file.
 - o Once the file opens in Excel, click the Office button (very top icon at the left hand corner) and select "Save As".
 - o If saving as an Excel file, click "Excel Workbook." Then, select a proper destination directory (C:\DC) to download the list of eligible students for Direct Certification.

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- o You need to save it as a comma delimited file, click "Other Formats". A "Save As" window will appear. Click the "Save as type" drop-down and select "CSV (Comma delimited)". Select a proper destination directory (C:\DC) to download the list of eligible students for Direct Certification. After clicking Save, a pop-up box appears asking about feature compatibility. Click "Yes" to continue saving as a CSV file
14. Click the X in the upper right corner of the window to close Excel.
 15. A pop-up box appears asking if you want to save the workbook file. Click "No" to return to the TX-UNPS website.
 16. After exiting Excel, click the Direct Certification link in the upper left corner to return to the Direct Certification Main Page.
 17. When your direct certification activities are complete, close the Direct Certification – Direct Verification window.

The file is now ready to be transferred to your system using *FTP Direct Cert*. You may use the following steps:

1. Click on Start->All Programs->CSDI->FTP Direct Cert
2. Please verify the Version and Revision numbers on the screen. The current program version of *FTP Direct Cert* is version 1.08, Rev. 29. The version number displays at the top of the screen. If you have an older version (smaller revision number) then you need to update to the latest program from our website.
3. A screen displays prompting you for the filename and will suggest the newest file in the directory:



4. If the suggested filename is correct, you may press [ENTER] to use it or type in a different filename and then press [ENTER].
 - o **Note:** This name should be the name you used when you downloaded the file from CNPIMS on the previous page. If not, this indicates you did not save the CNPIMS in the C:\DC directory.
5. The file transfer occurs and you will be informed of the result:

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FTP Direct Cert
230 User download logged in.
ftp> ascii
200 Type set to A.
ftp> Local directory now C:\DC.
ftp> lcd C:\DC
cd /IMOSDATA/22
250 CWD command successful.
ftp> ren DIRCERT DIRCERT.SAV
350 File exists, ready for destination name
250 RNTD command successful.
ftp> put DirCert1007.csv DIRCERT
200 PORT command successful.
150 Opening ASCII mode data connection for DIRCERT.
226 Transfer complete.
ftp> Invalid command.
ftp> chmod 0666 DIRCERT
quit
221-You have transferred 0 bytes in 1 files.
221-Total traffic for this session was 562 bytes in 1 transfers.
221-Thank you for using the FTP service on csdiloan.
221 Goodbye.
File transferred successfully
Press any key to continue . . .

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6. Note the next to last line. It will report either *File transferred successfully* or *File failed to transfer, correct the problem and retry*. If it does not read *File transferred successfully* then you will need to resolve the problem. If needed you may contact Systems Design for support.

The file is now ready to process by the Systems Design software. If this is not the first quarter proceed to **NOT FIRST QUARTER continues here** on the next page.

NOTE: If this is the First Quarter (July/August) stop here and do NOT proceed with these steps until your End-of-Year Rollover has been completed.

There are two reasons for not running the import at this time. First, any student who is on the D/C list and is new to your district will not have a Student Masterfile record requiring you to manually mark them later after your demographic update has been processed. Second, you might send letters to students who have left the district thus wasting your postage and time.

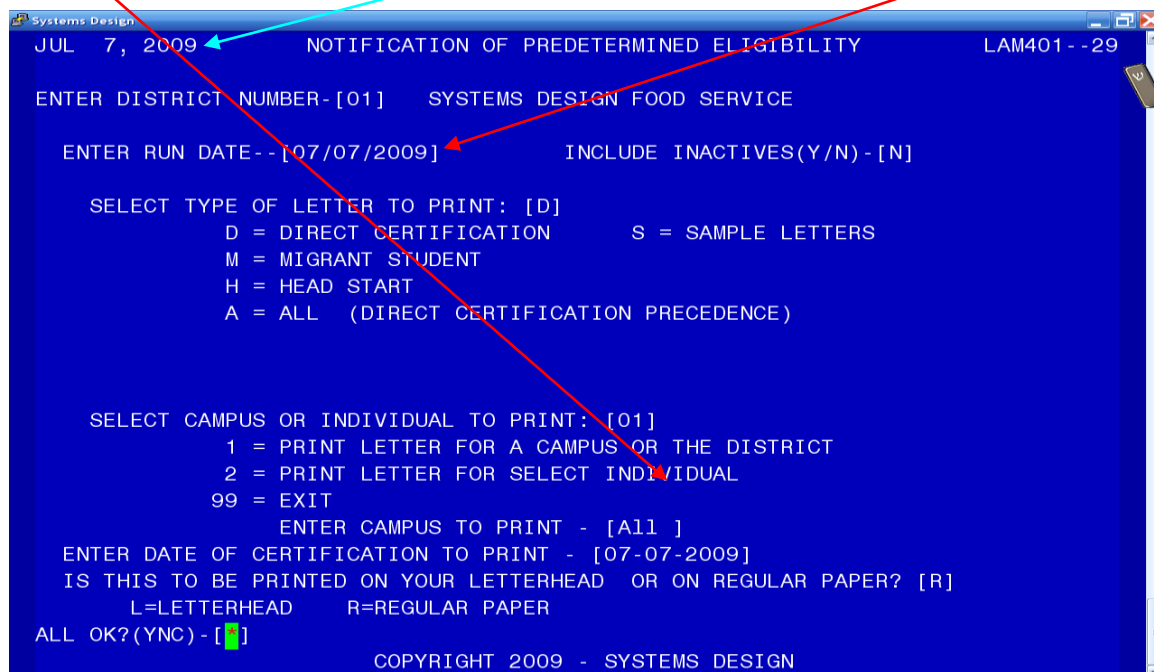
If you have completed the previous steps to transfer your Direct Certification file to the server, we will run the rest of the process for you as part of the End-of-Year Rollover process.

1. Go to LA-08 DIRECT CERTIFICATION MENU
2. Select 02 - PROCESS DIRECT CERTIFICATION
 - a. The system prompts for you printer #. Enter your printer # and confirm it. Next the screen displays the name of your district on the STUDENT KEY FILE BUILD screen and prompts ALL OK?(YNC)-[*]. Press Y to continue or C to cancel and abort the process.. The system prompts "DATE CERTIFIED", press [ENTER] for today's date. The system prompts If you enter another date, you will not be able to print just the letters for the records updated that day.
3. If the current date is in July or August, you are prompted "RESET LAST YEAR DIRECT CERTIFIED?". If you type Y, all of the students on file will have their Direct Certification flag cleared and only the students in the list you are importing will have their Direct Certification flag set to Y. If this is the first run for a new school year, the normal response is Y. If this is not the first run of the school year, type N. When the job has completed, look at the NUMBER OF STUDENTS NOT MATCHED to determine whether or not you need to follow the next two steps. Skip the next two paragraphs if this number is zero since a report will not print
4. Check your printer for a report labeled **DIRECT CERTIFICATION EXCEPTION REPORT**, which is a list of students who were not matched to Student Masters in your system. This matching is based on the Social Security Number provided by the State. There are two possible reasons for a student not to be matched. The first is if the student was enrolled with an incorrect Social Security Number or a mistake was made entering the Social Security Number into your PEIMS system. The other is the State may have the incorrect Social Security Number for the person.
5. NOTE: It will be necessary for you to use STUDENT MASTERFILE MAINTENANCE (FS-01-01) and perform a lookup to see if the Student is in your database and if they are, you will need to manually mark their Direct Certification status in Field 32 by typing a Y beside DC. There is no need to change the Social Security Number on the Student Masterfile, as your next Demographic Update would overwrite it. If the Social Security Number requires updating, then the PEIMS

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system needs to be updated and then the change will be brought into your system with the following Demographic Update.

6. Select 04 [DIRECT CERT LIST, BY CAMPUS] specify today's date, then write on the report it is after importing the Direct Certification update (this just shows students brought in on the system from the DC list today)
7. Select 14 [DIRECT CERT BY ASSOCIATION] print and update
8. Select 04 [DIRECT CERT LIST, BY CAMPUS] specify today's date, then write on the report it is after import and DC by Assoc. (this shows students made DC today)
9. Select 03 - PRINT DIRECT CERT LETTERS
10. NOTE: Do not print the letters until all the above corrections on the **DIRECT CERTIFICATION EXCEPTION REPORT** have been made.
 - a. Remember that letters should not be mailed out more than thirty days before the first day of school.
11. The system prompts ENTER RUN DATE, you may press [ENTER] for today's date.
12. Next the system prompts INCLUDE INACTIVES, normally the answer is N to exclude letters being printed for students who are no longer active.
13. Next the system prompts SELECT TYPE OF LETTER TO PRINT, press D for Direct Certification.
14. The system then prompts SELECT CAMPUS OR INDIVIDUAL TO PRINT, enter 01 to print letters for a Campus or the entire District.
15. The system will prompt ENTER CAMPUS TO PRINT, you may press [ENTER] to print letters for the entire District or you may enter a specific campus to print letters for just selected campuses. If you use this second option you will enter each campus number to be printed and then type END when complete.
16. Next you are prompted ENTER DATE OF CERTIFICATION TO PRINT, enter the same date you used in LA-08-02 above (usually today's date).
17. You will be prompted IS THIS TO BE PRINTED ON YOUR LETTERHEAD OR ON REGULAR PAPER. Type L if you are printing on letterhead; otherwise type R to print on blank paper.
 - a. The system prompts ALL OK, type Y if everything is correct, type N to reenter your selections. You may type C to cancel the entire job and return to the menu. Below is a sample screen. Note the Run Date and Date of Certification both use the current date.



18. Select 04 [DIRECT CERT LIST, BY CAMPUS] press [ENTER] to select all dates, you could write on it that is after importing and D/C by assoc (this shows everyone who is D/C)