

# Wisconsin

## 2014-2015 Direct Certification (DC) User Guide



### Wisconsin Direct Certification Contact Information

Technical questions or problems with the Direct Certification online process?

Contact the DCF Service Desk:

Email: [dcfservicedesk@wi.gov](mailto:dcfservicedesk@wi.gov)

Phone: 608-327-0840

Direct Certification policy questions? Contact the DPI School Nutrition Team:

Email: [dpifns@dpi.wi.gov](mailto:dpifns@dpi.wi.gov)

Phone: 608-267-9228

General questions? Contact CKF Direct Certification Outreach Specialists:

Email: [directcert@ckfw.org](mailto:directcert@ckfw.org)

Phone: 608-890-4783

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## Overview

### Purpose

The purpose of Direct Certification (DC) is to certify children who are automatically, or categorically, eligible for free school meals because their households participate in the FoodShare (SNAP) or W-2 cash benefits (TANF) program, or based on their eligibility as a foster child. The Direct Certification Program (DCP) does not identify students eligible for reduced price meals.

DC promotes participation in school meals programs by simplifying access to free meals for foster children and children in households with lower incomes. DC decreases paperwork for school staff and families, and improves the integrity of the process by establishing eligibility without using a paper application for free school meals.

DC electronically matches your student file to a state database of children in families enrolled in FoodShare, W-2 cash benefits or the foster care system. Each School Food Authority (SFA) is able to run DC as often as it wants. At a minimum, SFAs must run the process *three times* during federally required time periods each year:

1. **At or around the beginning of the school year (full enrollment list required)**
2. **Three months after the first run (full or partial enrollment list)**
3. **Six months after the first run (full enrollment list required)**

DC runs may be done with a full student enrollment list, with only a few names, or even with just one name, such as when a new student enrolls. There are two exceptions: the first and third runs are required to include total student enrollment.

It is advised that SFAs also run DC in October before the USDA collects information on the state's overall DC rates via the Verification Collection Report. During subsequent mandated periods (three months after the first run) you must, at a minimum, submit a list containing students who did not match on previous runs and any new students. Or, you may submit your full student list. The state database is updated every weekend to improve the likelihood of having the most up-to-date information each time an SFA runs DC.

This guide will help you run DC frequently and efficiently. Additional information on the policies and your responsibilities related to DC is available on DPI's webpage: [http://fns.dpi.wi.gov/fns\\_directcert](http://fns.dpi.wi.gov/fns_directcert).

### Process overview

DC uses a computer matching system to compare your list of students to the list of Wisconsin children enrolled in FoodShare, W-2 cash benefits or identified through the foster care system. The process is three steps:

1. Create a file with a list of currently enrolled students (student file creation instructions page 6).
2. Log into the Direct Certification Program (DCP) (see next section) and upload the student file. The DCP matches the student file with a database of children whose households are currently participating in the state FoodShare, W-2 cash benefits programs or who appear in the foster care system database. The match process takes a few minutes based on the number of enrolled students.
3. Once complete, the matched file is available to download. The matched file shows which children should be directly certified for free meals because they matched, and which ones cannot be directly certified. No further application is needed for those who are directly certified.

If there are questions about a student's eligibility, a paper application may still be completed.

Direct Certification, just like determination by paper application, is good for the remainder of the school year and up to the first 30 operating days of the next school year.

Running an up-to-date student enrollment list before the start of the school year (July-August) reduces the number of paper applications.

## Logging Into and Requesting Access to the Direct Certification Program

Use this link to get to the State of Wisconsin DCP <https://www.dwd.state.wi.us/dcfdirectcert/>. If you are using the system for the first time, you will need to request access to the system.

### 1. Click on “Request access to the new Direct Certification system”



**New Users**

If you have not yet accessed direct certification through this website:

1. Click here to [Request access to the new direct certification system.](#)
2. Read the [Direct Certification Instruction manual.](#)
3. Once your account has been activated use the link below to log in to the direct certification system.

**Registered Users**

- [Click here to log in](#)

### 2. Click on “Create a DWD/Wisconsin Logon”

**Please follow the instructions below to obtain, delete, or change access to the Direct Certification Program (DCP)**

1. Create a DWD/Wisconsin Logon and password to access this system. **Note:** This is not the same id you used to access the old direct certification program. If you already have an account for other DWD applications such as Work Permits (Not ISIS or WSLs), please skip to step 2.  
Click here to [Create a DWD/Wisconsin Logon](#)
2. After you have successfully created the Logon:  
Click here to complete the [Direct Certification Web Access Request](#)
3. Print the form and make sure that you read the directions carefully and supply all the required information.
4. Sign form and FAX to DCF Security at (608)327-6420
5. It may take 1 - 3 business days to complete your access request. An email will be sent to you when your access is ready. You will not be able to log into the system until you receive the email from DCF Security.

**Note:** The information in this system is confidential. You are strongly encouraged to read the Wisconsin Statutes (link is provided below).

3. Click on “Logon Creation”

4. Read the information on the Logon Creation page, and click “Accept.”

5. Fill in the Profile Information. Required information is indicated with a red asterisk\*. You must create a user name and password. You can choose any user name and password.

**Be sure to write down your user name and password.** If questions occur during self-registration, call the DCF Service Desk at 608-327-0840.  
**Your user name** \_\_\_\_\_  
**Your password** \_\_\_\_\_

**6. After you have successfully created the Logon, complete Step 2, the Direct Certification Web Access Request Form** found at: <https://www.dwd.state.wi.us/dcfdirectcert/AccountCreation.aspx>.

Please follow the instructions below to obtain, delete, or change access to the Direct Certification Program (DCP)

1. Create a DWD/Wisconsin Logon and password to access this system. **Note:** This is not the same id you used to access the old direct certification program. If you already have an account for other DWD applications such as Work Permits (Not ISIS or WSLs), please skip to step 2.  
Click here to [Create a DWD/Wisconsin Logon](#)
2. After you have successfully created the Logon:  
Click here to complete the [Direct Certification Web Access Request](#)
3. Print the form and make sure that you read the directions carefully and supply all the required information.
4. Sign form and FAX to DCF Security at (608)327-6420
5. It may take 1 - 3 business days to complete your access request. An email will be sent to you when your access is ready. You will not be able to log into the system until you receive the email from DCF Security.

**Note:** The information in this system is confidential. You are strongly encouraged to read the Wisconsin Statutes (link is provided below).

In the form, be sure to include the telephone number for both you (the person requesting web access) and your supervisor. When prompted to fill in an email address, provide your email address. Write your email address legibly, as this is how you receive web access notification. In the field "School District Name" private schools should enter *their school name*, not a public school district name.

Public schools should enter their school district name. Once complete, follow steps 3 through 5 to print, sign, and fax your request form. If you do not receive an email after three days indicating your web access is ready, please call the DCF Service Desk at 608-327-0840.

### ***DCP User Password Recovery or Reset Instructions***

If you forget your password, or are locked out of your account from typing your password incorrectly three times, follow these instructions to re-gain access to the program.

When creating your DCP logon, you entered your work e-mail address, a secret question and secret answer for making changes to your account information, including password changes. To reset or recover your password, go to <https://www.dwd.state.wi.us/accountmanagement/> and follow the account recovery instructions to unlock the ID or to obtain a new password. The DCF Service Desk (608-327-0840) can also assist you if you have problems with your WIEXT ID, also known as DWD WI Logon ID.

### **Student File Creation**

Whether you use special software or create your own a file, the file uploaded to the DCP must be a "tab delimited text" (.txt) file. Microsoft Excel is a common way to create a tab delimited file, but you can use any text editing software that can save the file as a "tab delimited text" (.txt) file.

Use the following instructions to create your student file to upload to the DCP. You can also use this link to connect to the DPI Direct Certification page to view a usable Excel Spreadsheet Template: [http://fns.dpi.wi.gov/files/fns/xls/dc\\_template\\_1415.xls](http://fns.dpi.wi.gov/files/fns/xls/dc_template_1415.xls).

Note: Most software packages used by SFAs to manage student information are set up to help create the student file needed for DC information.

### Student file layout

The DCP requires the student file be in a **tab delimited** format and contain the following information:

- Last Name: Character data (up to 20 characters)
- First Name: Character data (up to 15 characters)
- Middle Initial: Character data (up to 1 character or left blank)
- Date of Birth: Required date format (MM/DD/YYYY)
- School Use: Character data (enter any information up to 28 characters or leave blank)
- School Number: Character data (up to 4 digits or, single site/school SFAs may leave blank)

### Creating the student file with Microsoft Excel

Once you have your student data in Excel, make sure the information is placed in columns in this order, *but do not make them column headings*.

Last Name      First Name      Middle Initial      Date of Birth      School Use      School Number

**School number** is a new field for SY2014-2015. It can be found in the Wisconsin School Directory, or online at <https://apps4.dpi.wi.gov/SchoolDirectory/Search/PublicSchoolsSearch> (for public schools) and <https://apps4.dpi.wi.gov/SchoolDirectory/Search/PrivateSchoolsSearch> (for private schools.)

Click on **File**, and then **Save As**. In the “Save as type” box select: **Text (Tab delimited) (.txt)**.

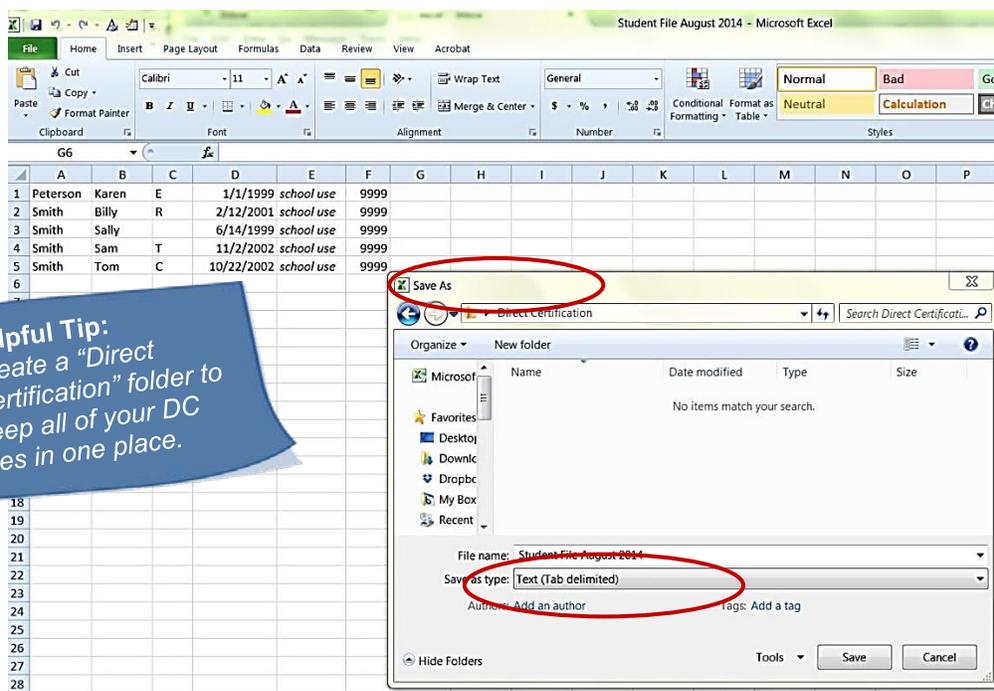
You can save the file with any name – establish a systematic way to name files – to any location on your computer. Consider a folder named Direct Certification. Be sure to note the name and location so you can find it when you want to upload it.

**Write down your folder name and file naming system.**

**Folder name** \_\_\_\_\_

**File name example** \_\_\_\_\_

The file will look like this when using “Save As” in Excel:



## Creating the student file with Microsoft Word or other text editor software

To create a tab delimited file, do the following for each student:

1. Type the student's last name
2. Press the Tab key
3. Type the student's first name
4. Press the Tab key
5. Type the middle initial or hit the space bar once for no middle initial
6. Press the Tab key
7. Type the student's date of birth (MM/DD/YYYY)
8. Press the Tab key
9. Type in your school use information or hit the space bar to leave blank
10. Press the Tab key
11. Type the school number. (Up to 4 digits or, single site/school SFAs may leave blank)
12. Press the enter key and repeat steps 1-11 for each additional student

You can use Microsoft Word or other text editor software, like Notepad or WordPad, to create your file.

For a large number of students, use Excel or other spreadsheet software.

**Helpful Tip:** Sort your student file alphabetically by last name, then first name to help the matching process run faster.

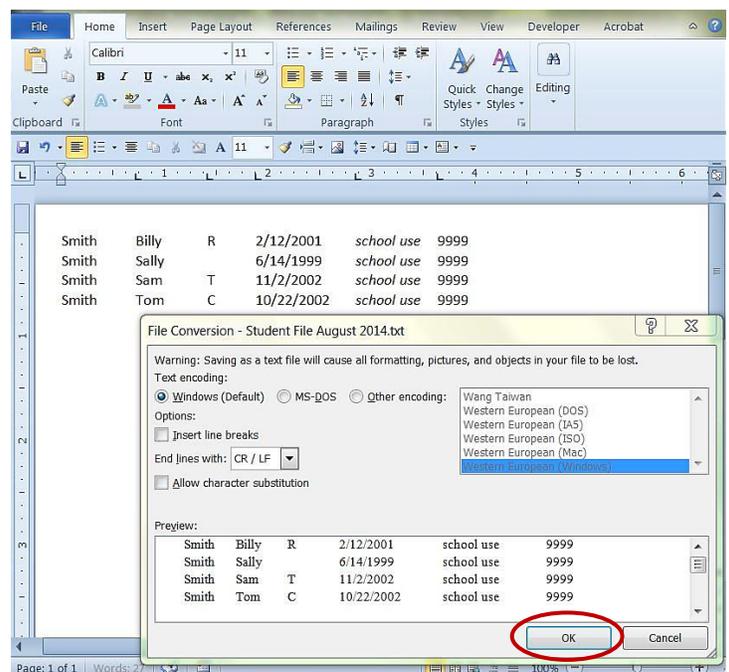
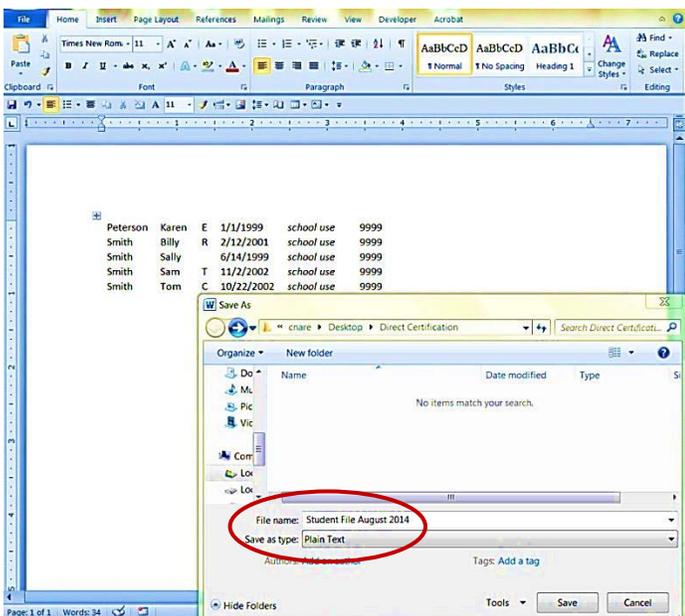
A two-step process saves and converts the file. After entering all the student information in a tab delimited format, **click File**, then **Save As**.

In the **“Save as type”** dropdown select: **Plain Text (.txt)**, **Text Document (.txt)** or whatever your term software uses to designate a .txt file.

You can save the file with any name and to any location on your computer. Note the name and location so you can find it to upload it.

1. The file will look like this when using “Save As” in Microsoft Word:

2. After you **click save**, a file conversion dialog box opens. **Click OK** to save file.



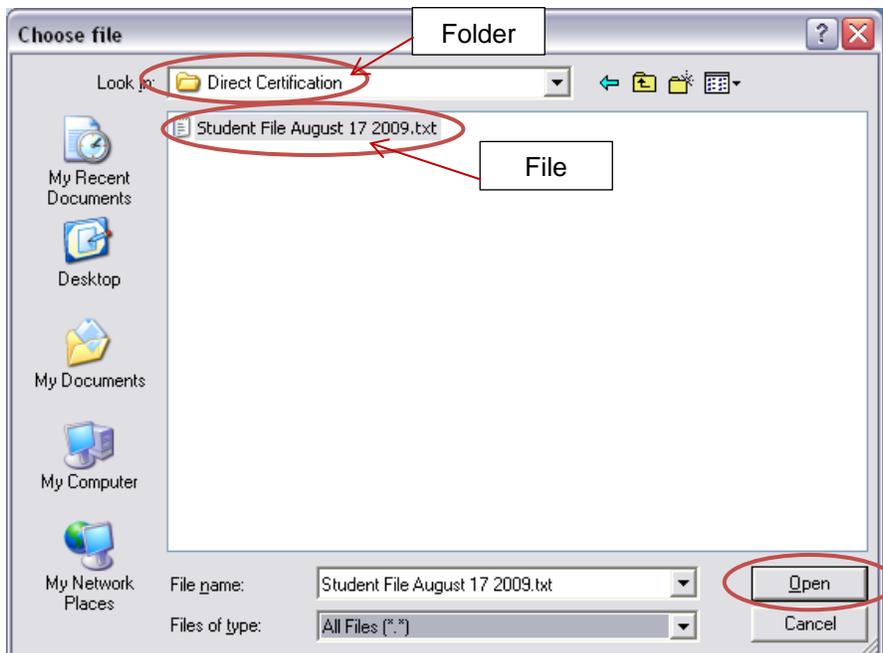
## Uploading the Student File

1. After you have logged into the DCP (<https://www.dwd.state.wi.us/dcfdirectcert/>) click on the “**New Match**” link from the menu on the left side of the web page to access the student file upload page (pictured below). Click on the “**Browse**” button from the upload page.

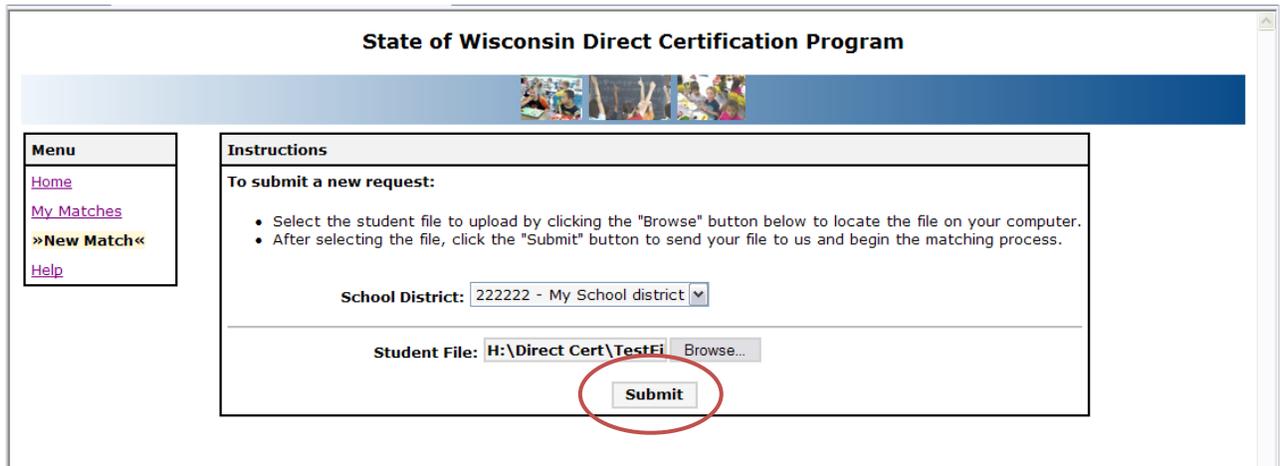


A file dialog box (pictured below) will open to **locate the student file** you want to upload to match for eligibility. **Browse** to where you saved your file on your computer. In this example, the person who made the student file created a folder called “Direct Certification.”

2. After locating the file, click the “**Open**” button on the file dialog box.



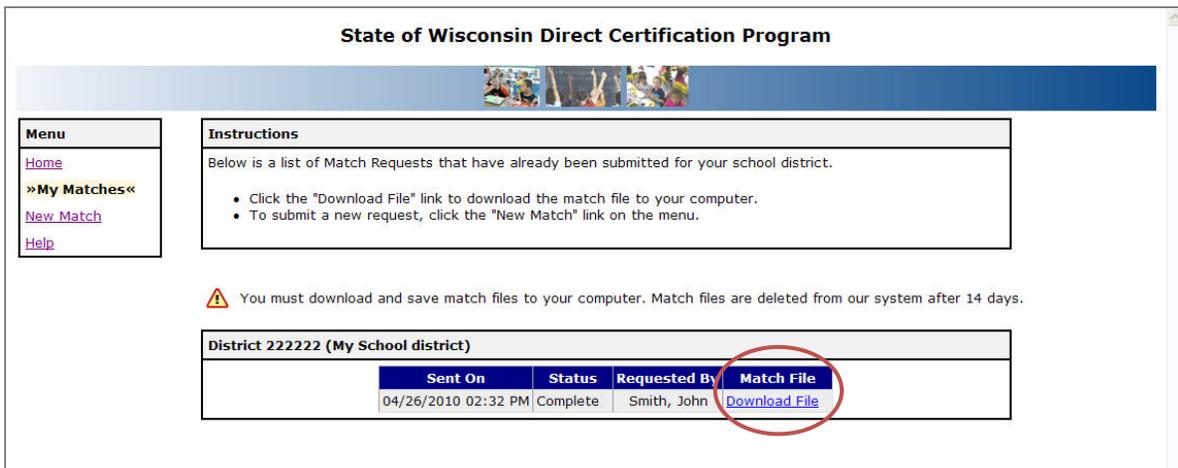
3. After selecting the file, click the “Submit” button and the match process begins.



Number of Students	Approximate Time to Process File
<1000	1 minute
1001-10,000	2 minutes
10,001-40,000	3 minutes
Milwaukee Public Schools	12 minutes

During the matching process, your computer screen may show zero percent (0%) processing for a short time; don't worry, the system is working!

Once the match process is complete, the page will automatically refresh and display a link to **download the match file**. You must download and save match files to your computer. Match files are deleted from the DCP after 14 days.



## Common Errors

If you submit your student file and receive an error message, check for these problems:

- **File not saved in tab delimited format.** Whether you use special software or create your own file, the file to be uploaded to the DCP must be a **“tab delimited text” (.txt)** file
- **Missing column.** Check that the student file has all the appropriate columns (Last Name, First Name, Middle Initial, Date of Birth, School Use, and School Number). Remember Middle Initial, School Use, and School Number columns can be left blank, but you must still have a column in place for these fields.

## The Match File

### Saving the match file

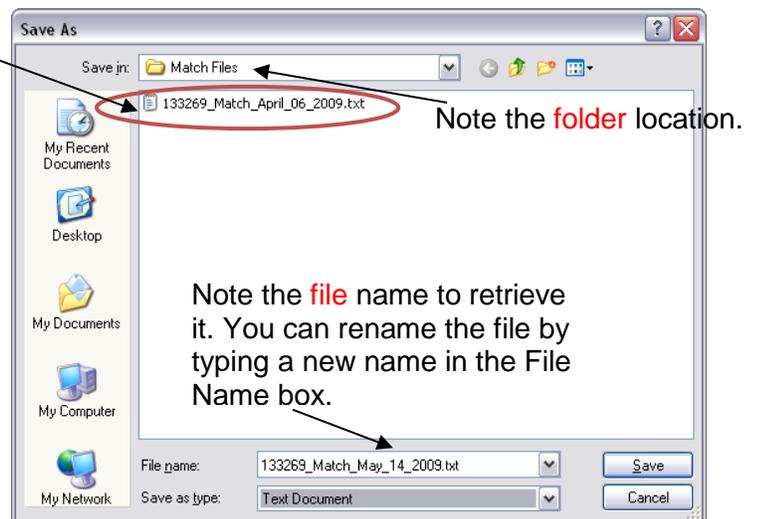
It is very important to save the match file in a secure place. These files are as important as approved paper applications because they are your proof of eligibility. You are required to keep your match files for a minimum of five years beyond the current year.

To download your file **click on the “Download File” link** for the file you want to save. When you click the “Download” link a file download dialog box will open.

**Click the “Save”** button and use the file save dialog (pictured right) to select the place on your computer where you wish to save the file.



By default the DCP system names the file with your school district agency code and the month, date and year the file was matched.



**DPI policy states** that documentation for DC must be kept for a minimum of five (5) years. For the most current policy see the Wisconsin DPI website <http://publicrecordsboard.wi.gov/docview.asp?docid=15892&locid=165>

**You must download and save match files to your computer. Files are deleted from the DCP system after 14 days.**

**Match file layout**

The match file you download is in the same tab delimited layout as the student file with the addition of an eligibility or error code at the end of each record. **Note:** *the School Number column in your submitted student file will not appear in the match file.* The match file contains this information:

Field	Description
Last Name	Character data (up to 20 characters)
First Name	Character data (up to 15 characters)
Middle Initial	Optional. Character data (up to one character)
Date of Birth	Character data (ten characters) Format: MM/DD/YYYY
School Use	Optional. Character data (up to 28 characters)
Eligibility or Error Code	One character (S, T, O, E, N) for eligibility or (B,F,L) for error codes

The match file is always returned in a Notepad (.txt) file format. You may save it in another format (e.g., Microsoft Excel), but you must save a copy of the match file in the Notepad format in which it was received. Below is an example of the match file in the Notepad format as received from the DCP:

**999999\_Match\_July\_1\_2014 - Notepad**  
 School District 999999 Direct Certification File Created On 07/01/2014

STEVENS	DARREL	01122008	B	Error codes based on missing or wrongly formatted information.
THOMAS	HUNTER		B	
THOMAS		08/09/2002	F	
	TYRELL	11/22/2007	L	
BURNS	ALEC	03/01/1996	S	Matched; all directly certified eligible.
HIGGENS	DAPHNE	12/21/2009	T	
RICE	GAVIN	05/02/2005	O	
RICE	REECE	04/21/2002	E	
ROGERS	LILLIAN	04/22/2004	E	
STEIN	ALBERT	12/01/1999	E	
WILSON	ARIEL	10/02/2004	N	Not eligible.

The first line above the student information is the SFA's agency code and the date the match file was created.

The School Number will not appear in the match file. The last column is the Eligibility or Error Code.

*This example does not contain actual names, birth dates or school information.*

**Eligibility Codes and Error Codes**

Each student record will have one of five **eligibility codes**. The USDA Verification Collection Report (an annual form that SFAs complete, due February 1, that indicates those eligible for free meals through direct certification) requires separate reporting of students eligible for FoodShare (SNAP).

**Eligibility Codes**

Code	Description
S	Eligible. The child matched with FoodShare (SNAP) information and is automatically eligible for free meals.
T	Eligible. The child matched with W-2 cash benefits information and is automatically eligible for free meals.
O	Eligible. The child matched with both FoodShare and W-2 cash benefits information and is automatically eligible for free meals. (On the Verification Collection Report, this student will be reported <b>certified</b> based on FoodShare).
E	Eligible. Foster child matched with the state foster care system database and is automatically eligible for free meals.
N	Not eligible. The student was not found in the database or is in a closed or ineligible case.

The codes “B”, “F” and “L” will no longer show up as partial match eligibility. If they appear on the match file, treat them as **error codes** due to missing or incorrectly formatted fields from the student record. The codes will appear at the top of the file, above the eligibility codes.

Code	Description
B	Incorrectly formatted or missing birth date
F	Incorrectly formatted or missing first name
L	Incorrectly formatted or missing last name

For these error codes, reformat the data or enter the missing information and re-run those students.

## Ineligible Students

Children’s households can be enrolled in FoodShare and W-2 cash benefits throughout the year, so it is possible that a student who does not match on a given DC run may become eligible and match in DC runs later in the year. The DCP database is updated every weekend. DC may be run with a full student enrollment list and may be run with only a few names or even one name (such as when a new student enrolls).

If a household completes an application with a FoodShare or W-2 cash benefits case number for a student with an ineligible status, the application should be approved if it contains all of the required information since applications are taken at face value. However, SFAs may choose to verify these applications for cause if they think the information provided is inaccurate.

## Notification of Direct Certification

The next step in the process is to send a letter to the households of directly certified students (those matched as S, T, O or E) informing them that the students are automatically eligible for free meals. You can use this link to view a letter template on the DPI DC page: [http://fns.dpi.wi.gov/files/fns/doc/dc\\_nltr\\_1415.doc](http://fns.dpi.wi.gov/files/fns/doc/dc_nltr_1415.doc).

Letters are required to include the following:

- ✓ The name(s) of the eligible student(s)
- ✓ Space to list additional students in FoodShare or W-2 cash benefits households who were not directly certified
- ✓ A sentence clearly indicating that they do not need to fill out a paper application
- ✓ Information about how to opt out of receiving free meals
- ✓ School contact information if the parent(s)/guardian(s) has questions
- ✓ The USDA non-discrimination statement must be included in all written communication to households regarding the school meals program(s)

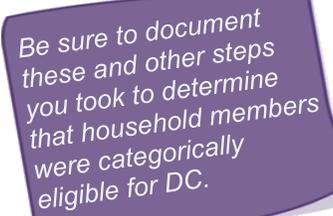
## Household Categorical Eligibility

When households receive a letter informing them that one or more of their children have been directly certified, the parent/guardian may ask about the status of other children in the household. Schools are required to extend eligibility to other eligible students/siblings in the household.

You may be able to use enrollment records to determine additional children who are part of the household, but were not identified through DC.

A child who is a member of a household that is enrolled in FoodShare or W-2 cash benefits is “categorically eligible” for free school meals. Categorical eligibility is extended to all children in a household if any member of the household is enrolled in these programs.

Free meal benefits do not extend to children in households with a foster child unless the household is also receiving FoodShare or W-2 cash benefits.



Be sure to document these and other steps you took to determine that household members were categorically eligible for DC.

## Wisconsin Direct Certification Contact Information

Technical questions:

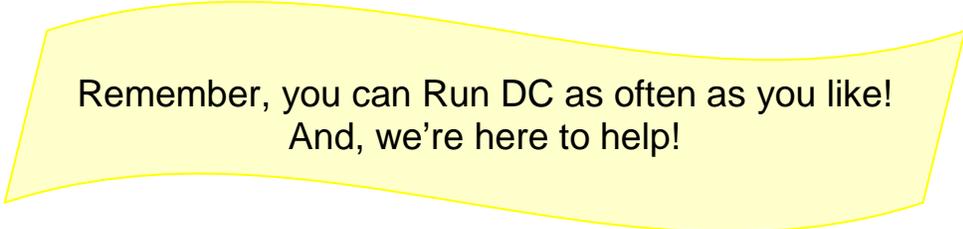
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Policy questions:

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Phone: 608-267-9228

General questions:

Covering Kids & Families Direct Certification Outreach Specialists:  
Email: [directcert@ckfwi.org](mailto:directcert@ckfwi.org)  
Phone: 608-890-4783



Remember, you can Run DC as often as you like!  
And, we're here to help!