

Child and Adult Care Food Program

ELECTRONIC DIRECT CERTIFICATION SYSTEM

Guidance Document 13-18

**Issued for Child and Adult Care Food Program,
Updated May 2013**

May 2013 (Updated Direct Certification Effective Dates pg. 14)



Nutrition and Wellness Programs

Illinois State Board of Education

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IMPORTANT

This document was updated to follow the regulations of the Child and Adult Care Food Program (CACFP). It was originally written for sponsors of the National School Lunch Program, which is why all computer screens are written for local educational agencies (LEAs). This will not impact your use of the Electronic Direct Certification System.

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Introduction

What is Direct Certification? It is a simplified way to determine which children are eligible for free meal benefits based on the Supplemental Nutrition Assistance Program (SNAP) (formerly the Food Stamp Program) and/or the Temporary Assistance to Needy Families (TANF). Currently, if a family completes a Household Eligibility Application with a valid SNAP or TANF number the application is approved in the free category. With Direct Certification you can check to see if a child is receiving those benefits with information provided directly by the agency administering those programs. Once you find a child through the Direct Certification process a Household Eligibility Application does NOT have to be completed.

What is the Electronic Direct Certification System? The Illinois State Board of Education in cooperation with the Illinois Department of Human Services (IDHS), the agency administering SNAP and TANF, has developed an internet system which allows you to check children enrolled at your institution directly to the SNAP and TANF data base. This system is the only method to identify children receiving SNAP or TANF benefits. The Direct Certification process can only be conducted via this electronic system on the internet. Step by step instructions are included in this guidance.

What must a CACFP institution agree to when using Direct Certification? Because the Direct Certification data base includes names and personal information about persons throughout the entire state of Illinois who receive SNAP or TANF benefits, **your institution's staff must agree to:**

- Do NOT use the Direct Certification process to verify SNAP or TANF numbers submitted on Household Eligibility Applications. Instead, follow the instructions in the Administrative handbook on how to recognize a valid case number.
- Follow all rules and regulations regarding the use of this data including confidentiality and disclosure.
- Select a person employed by your CACFP institution that will be given access to this information for the sole purpose of determining children's eligibility for free CACFP meals and/or snacks.
- Use this system to identify children for only free CACFP meals and/or snacks. Do not use children's eligibility information for any other purpose.
- Distribute and file this confidential data and reports from this system in a secure manner accessible only to the designated, authorized personnel who will use the information to identify children eligible for free meals and/or snacks.
- For the children identified through the Electronic Direct Certification System, you will ensure you have a printed, dated report showing the names of each child you will claim for free meals and/or snacks. Be sure to read and follow the section on *Using the Direct Certification Report*.
- Maintain documentation so it can be retrievable by each CACFP site and make it available to a CACFP reviewer or auditor to determine the certification of the children as members of a SNAP or TANF household was completed correctly.
- Distribute Household Eligibility Applications to children who were NOT identified free through the Direct Certification process. Make sure when distributing the Household Eligibility Application that you in no way identify children receiving free meals. It is suggested to distribute the CACFP Annual Enrollment form to all parents when application documents are given.

Accessing the Electronic Direct Certification System

You access the Electronic Direct Certification System by logging into the Illinois State Board of Education (ISBE) Web Application Security (IWAS); open Child Nutrition Application and Claim Entry System (ACES). Direct Certification is listed near the bottom of the main menu. The five steps below will easily help you find the Direct Certification link.

Step One: Access IWAS at www.isbe.net or www.isbe.net/nutrition.



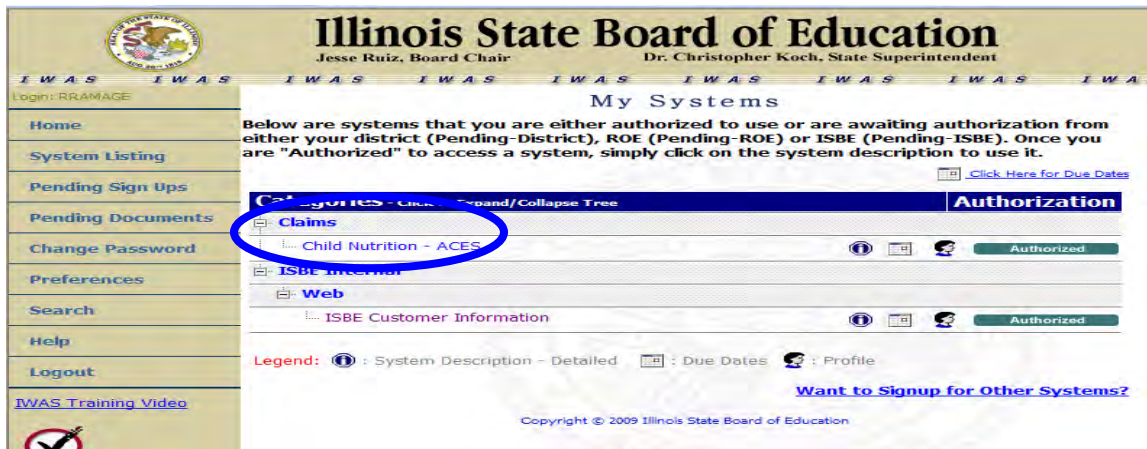
Step Two: Enter your *Login Name* and *Password* to access IWAS. For questions regarding IWAS, contact ISBE Technology Support at 217/558-3600.



Step Three: Once logged in to IWAS, click on *Systems Listing* in far left margin.



Step Four: Select *Child Nutrition ACES*.



Step Five: From the Main Menu of Child Nutrition ACES, select *Direct Certification*.



Overview of the Electronic Direct Certification System

Once you are in the *Electronic Direct Certification System*, you will select from the main menu on the upper left hand corner of the screen.

- Home
- File Upload Match
- Single Child Match
- Download Files
- Contact Us

Clicking on each menu item will open a screen with instructions. Appendix A of this guidance document contains the screen shots showing the instructions.

Three Different Ways to Directly Certify Children

The system can be used in three different ways to obtain eligibility information for children within your institution. Below is a **very brief overview** of the three methods. You must read and follow the complete step-by-step instructions, provided in this guidance, when completing the actual Direct Certification process.

1) File Upload Match—Sponsor Match (All Institutions May Use this Method)

All institutions may upload a comma-delimited file with the child's first name, last name, and if available, gender, birth date, and an optional field for unique identifier (each record must have a carriage return between them) to the Electronic Direct Certification System. Instructions on how to create a comma-delimited file are available in Appendix B. The *File Upload Match—Sponsor Match* will create a Sponsor Report which will identify children from the uploaded file that are receiving SNAP and/or TANF benefits.

2) Single Child Match (All Institutions May Use this Method)

All institutions may also search for a single child who receives SNAP or TANF benefits to determine free eligibility for the Child Nutrition Programs. This method allows for individual children to be searched for in the system by entering either their Department of Human Services (DHS) case identification number or their first and last name and optional city.

3) Download Files—Annual Match (Only for Public Schools and Child Care Centers When Enrolled in ISBE Early Childhood Education Programs)

Public school districts have access to ONE *Annual Report* each school year. The *Annual Report* is available around July 1. The *Annual Report* identifies children enrolled in the Student Information System (SIS) the previous school year for their district that are receiving SNAP or TANF benefits.

Direct Certification Report

No matter which of the three methods of Direct Certification you use, it will yield a Direct Certification Report. The report(s) created will provide exact matches and close matches. Institutions should go through both the exact matches and the close matches to determine whether those children listed are the children that are actually enrolled at your institution.

No Household Eligibility Applications

When a child is identified on the Direct Certification Report, a Household Eligibility Application is NOT needed. The printed report is your documentation to claim that child for free meal and snack benefits. You are still required to have a CACFP Annual Enrollment Form on file to claim meals for any child, regardless of eligibility category.

Recordkeeping and Reporting Requirements

Even though children eligible through the Direct Certification process will not have a Household Eligibility Application, other record keeping and reporting requirements are the same as those with applications. The number of children eligible for free program benefits as a result of Direct Certification must be included on your *Master List of Enrolled Children* (ISBE 67-95). The number of free eligibles on your Claim(s) for Reimbursement will include children directly certified; those with completed and approved Household Eligibility Applications; those given extended categorical (automatically) eligibility based on a sibling's Direct Certification or Household Eligibility Application (please see the section on *Extended Categorical Eligibility* in this guidance), and those categorically eligible based on Head Start or Even Start enrollment.

Instructions for the Electronic Direct Certification System

Review the step-by-step instructions for the three types of matches to determine which ones will work best for your program. You are not required to use the same method every time.

File Upload Match—Sponsor Match File (All Institution May Use)

All institutions may create and upload a comma-delimited file with children's first names and last names, and if available gender, birth date, and optional field for a unique identifier (use a carriage return between each record) to the Electronic Direct Certification System. **For additional information on how to create a comma-delimited file, reference Appendix B.**

Once your file is uploaded and compared to the data base, a *Sponsor Report* is created to identify children on the sponsor-created upload file that are receiving SNAP and/or TANF benefits. A sample *Sponsor Report* is available as *Appendix D*. Since this sample report includes *real data*, some information is blocked-out on the report (name, address, and last digits of case number) to protect the confidential information. If you have more than one location, please keep the children from each facility on separate reports. There are no limits to the number of files that may be uploaded to the Electronic Direct Certification System.

To use the File Upload Match—Sponsor Match File, follow the seven steps below after you log into the *Electronic Direct Certification System*.

The screenshot shows the Illinois State Board of Education's Electronic Direct Certification System interface. The page title is "File Upload Match". The navigation menu on the left has "File Upload Match" highlighted with a red circle and labeled "Step One". The main content area contains the following text:

An LEA may upload student information to the Electronic Direct Certification System. The system compares student information with SNAP/TANF data. Matched student information will be available in a report or downloadable file on the Download Files page. A report created by the LEA with an uploaded student file is named Sponsor File with the appropriate date. There is no limit to the number of file uploads by an LEA. Once the system has completed the match, you will be automatically transferred to the Download Files page. The most current file will be the bottom file.

The file format for this upload file match must be a comma delimited file with the following fields:

- First name
- Last name
- Gender (F = female, M = male)
- Birth date (month/day/year, 01/01/1970)

Refer to the Direct Certification Guidance Document which is located [here](#) for complete information on creating a comma delimited file or if you are unable to provide the four required fields.

Below the instructions, there is a "Select a File to Upload" section with a file path "C:\Documents and Settings\rramage\Des" and a "Browse..." button, both circled in blue and labeled "Step Two". Below that is an "Upload" button circled in purple and labeled "Step Three".

Sponsor Match—Step One: Select *File Upload Match* from the main menu on the upper left hand corner of the *Electronic Direct Certification System*.

Sponsor Match—Step Two: In the center of the page, click *Browse* to select a file to upload. Find the comma-delimited file you created and saved to your computer for this upload; click *Open*.

Sponsor Match—Step Three: The name of the file will appear in the *Select a File* area of the screen; click on *Upload*.

Sponsor Match—Step Four: The system will process your request. Once complete, you will automatically be taken to the *Download Files* screen. The name of each file uploaded will be listed as a *Sponsor File* with the date and time. The most recent *Sponsor Match Report* is the file on the bottom of the list.

Sponsor Match—Step Five: Select *Print*, you will see a preview screen of the *Sponsor Match Report*. This is the results of comparing your uploaded file to the *Electronic Direct Certification System*. Both exact and close matches will be displayed in separate groups. You will need to click the printer icon at this time to get a printed copy of the *Sponsor Match Report*. After printing, close that screen. Review the printed list of children, and determine if any of the matches are children enrolled in your program. It is recommended to line through all children that are not enrolled at your center. **Remember, you must print a copy of the *Sponsor Match Report* as shown in *Appendix D* of this guidance as documentation to claim children’s meals and snacks in the free category.**

Sponsor Match—Step Six (Optional): Follow if you have electronic computer system for children’s eligibility. Select *Download* to obtain the data, shown on the *Sponsor Match Report*, in a format that may be uploaded to your computer system used to maintain eligibility information. For more information about downloading a file with the *Electronic Direct Certification System*, please reference *Attachment F, Downloading a File*. **Do not print the download file, it cannot be used to document eligibility—it is not an official dated report.**

Sponsor Match—Step Seven: Each child that appears on the *Sponsor Report* and is currently enrolled in your institution must be recorded on the *Master List for Enrolled Children (ISBE 67-95)*. **A Household Eligibility Application is NOT needed for these children. They are approved free for twelve months.**

SPECIAL NOTE: If only one child in a family matches to the *Electronic Direct Certification System*, please refer to the section on *Extended Categorical Eligibility* in this guidance to find out how the other children in that same family qualify for free meal benefits.

Single Child Lookup (All Institution May Use)

The *Electronic Direct Certification System* also allows you to complete a search for an individual child. You may search using the SNAP or TANF case number or on first name and last name with an optional city. The *Single Child Lookup Report* will show the child you entered via the Single Child Lookup System and *Added to the Report*. Several children can be looked up using the Single Child Lookup and added to the same report. All children listed on the *Single Child Lookup Report* receive SNAP or TANF benefits and are eligible for free meal benefits if enrolled at your institution. A sample *Single Child Lookup Report* is available as *Appendix E*. Since this sample report includes real data, some information is blocked-out (name, address, and last digits of case number) on report to protect confidential information. There are no limits to the number of single child lookups that an institution may conduct via the Electronic Direct Certification System. You can go into the system at any time to look up a child. We do request you limit each *Single Child Lookup Report* to include no more than eight children per report. If you have more than one facility, please keep the children from each facility on separate reports.

Remember, most often you will try to match the name of the child with the *Single Child Lookup*, because you will not have the SNAP or TANF case number. You **cannot** collect the SNAP or TANF case number on a Household Eligibility Application and then use the *Single Child Lookup* to **verify** that case number. The *Electronic Direct Certification System* cannot be used to verify information on the Household Eligibility Application. The only way you can use this lookup method to check a SNAP or TANF case number is if you had received that number on the previous year's Household Eligibility Application or the number was on another document you collected for other purposes.

To use the Single Child Lookup, follow the four steps below after you log into the *Electronic Direct Certification System*.

The screenshot shows the Illinois State Board of Education's 'Single Child Match' interface. The page title is 'Single Child Match'. A red circle highlights the 'Single Child Match' link in the left-hand navigation menu, with a red box labeled 'Step One' next to it. A blue circle highlights the 'Case Number Name and Address' radio button under the 'Select Search Criteria' section, with a blue box labeled 'Step Two' next to it. The page also includes instructions on how to use the search criteria and a 'Search' button at the bottom.

Single Child Lookup—Step One: Select *Single Child Match* from the main menu on the upper left hand corner of the *Electronic Direct Certification System*.

Single Child Lookup—Step Two: Select *Case Number* or *Name and Address* to search for an individual child. Enter the required data: the 10–13 digits SNAP/TANF case number or first and last name with an optional city. Click *Search*.

Single Child Lookup—Step Three: The results of each search will appear on the screen. Both exact and close matches will be displayed in separate groups. Review the list of children, and if a match is found (a child is enrolled in your institution), select *Add to Report*. In the sample screen shot below confidential information including child’s name, address, and last digits of case number, has been blocked-out of the report.

Exact Matches

Name	Address	Birth Date	Sex	Case Number	
		05/18/1992	M	94-112-22-	Add To Report
		08/28/1993	M	96-208-22-	Add To Report
		07/27/2006	M	94-208-22-	Add To Report
		10/25/1996	M	94-228-22-	Add To Report
		05/17/2000	M	94-109-22-	Add To Report

Step Three

Internet

Single Child Lookup—Step Four: Once a child is added to a report, the following choices will appear right above the report: *Edit Report*, *Print Report*, or *Clear Report*.

- *Edit Report:* A list of the children added to the report will appear. From this screen, a child may be removed from the report if not enrolled at your child care institution.
- *Print Report:* Select *Print* to obtain a copy for your records. A paper copy of this report is required for a child to receive free meal benefits.
- *Clear Report:* This selection will remove all children from the report to begin a new report.

All the children on the *Single Child Lookup Report* and enrolled at your child care center must be recorded on the *Master List for Enrolled Children (ISBE 67-95)*. **A Household Eligibility Application is NOT needed for these children. They are approved free for twelve months.**

SPECIAL NOTE: If only one child in a family matches to the *Electronic Direct Certification System*, please refer to the section on *Extended Categorical Eligibility* in this guidance to find out how the other children in that same family qualify for free meal benefits..

Annual Match (For ONLY Public School Districts and Child Care Centers When Enrolled in ISBE Early Childhood Education Programs)

Only public schools districts and ISBE Early Childhood Education centers will have access to ONE *Annual Report* each school year. The *Annual Report* for public schools will be available near July 1. The *Annual Report* will identify students enrolled in the Student Information System (SIS) for their district that are receiving SNAP or TANF benefits. A sample *Annual Report* is available as *Appendix C*. This method allows schools and Early Childhood Education centers to print and download the Annual Report.

To obtain the *Annual Match*, once in the *Electronic Direct Certification System* follow the four steps below.

Annual Match—Step One: Select *Download Files* from the main menu on the upper left hand corner of the *Electronic Direct Certification System*.

Download File

Each public school district LEA will have a download file named Annual. This file is created one time per year by ISBE to compare students enrolled in the Student Information System with the June SNAP/TANF file. The Annual file will be available no later than July 1. Public school districts are encouraged to update student eligibility using the Annual file first.

If any LEA uploads a file with student information to match to the SNAP/TANF database, the download file(s) will be named Sponsor File with the appropriate date.

For each file, the LEA must select Download or Print.

File Type	Match Date	Download	Print
Annual	7/6/2009 1:39:49 PM	Download	Print

Annual Match—Step Two: Select *Print* to obtain a hard copy of the *Annual Match Report*. You must print from *Annual Report* by selecting the print button. Be sure you print the report, not the downloaded file. The report will contain the first date of eligibility. This report will contain exact and close matches.

Annual Match—Step Three (Optional): Select *Download* to obtain the *Annual Match Report* data in a data format that may be uploaded to a Point of Sale (POS) Computer System or other system used to maintain eligibility information for the School-Based Child Nutrition Programs. For more information about downloading a file with the *Electronic Direct Certification System*, please refer to *Attachment F, Downloading a Direct Certification File*.

Annual Match—Step Four: Each child that appears on the *Annual Match* and is currently enrolled in your institution must be recorded on the *Master List for Enrolled Children (ISBE 67-95)*. **A Household Eligibility Application is NOT needed for these children. They are approved free for twelve months.**

Using the Direct Certification Results

The *Electronic Direct Certification System* allows institutions to certify children for free meals based on the children receiving SNAP and/or TANF benefits. It is the responsibility of your institution to have reports to backup the results of Direct Certification process. Make sure you have an official dated report, printed for every child you will claim free based on Direct Certification. As mentioned earlier, if you have more than one site, complete your searches so the children are grouped together by site so they appear on the same report.

Reports will contain Exact Matches and Close Matches. All of the reports will include:

- First name
- Last name
- Birth date
- Sex
- Case number
- Street address
- City
- State
- Zip code

All matches, both exact matches and close matches, must be reviewed in order to determine the child(ren) on the report is the actual child(ren) enrolled at your child care institution. If you determine a child on the report is not the child enrolled at your center, mark through the child's name to show you will not claim the child for free meal benefits.

Each Direct Certification Report (Sponsor, Single Child Look-up, or Annual Report) is dated the day the report is printed.

Using Direct Certification Results - Updated May 2013

- Children approved through direct certification must be updated annually and may not be more than 12 months old and are considered current and valid until the last day of the month in which the form was dated one year earlier.

All children listed on the Direct Certification Report must be recorded on the *Master List of Enrolled Children*, enter the effective dates and eligibility category. Don't forget you still need a CACFP Annual Enrollment Form for each child.

SPECIAL NOTE: All reports are confidential and should be provided only to those who work directly with certifying meal benefits. All records should be maintained in a confidential and secure area. Maintain records for three years plus the current fiscal year.

Extended Categorical Eligibility

The policy for Extended Categorical Eligibility changed in 2009 to allow free meals and snacks for children who are members of the household receiving assistance under the Supplemental Nutrition Assistance Program (SNAP) or Temporary Assistance to Needy Families (TANF) Program. The policy states a valid SNAP or TANF case number now allows **ALL children** in the same family to be automatically eligible for free meals. The SNAP or TANF case number can belong to any member of the family, a child or an adult. The USDA definition for *family* means *a group of related or nonrelated individuals, who are not residents of an institution or boarding house, but who are living as one economic unit.*

Extended Categorical Eligibility can be given to all children listed on the Household Eligibility Application when a valid SNAP or TANF case number is given for any member of that family. The application is documentation that all the children should receive free meal benefits.

Extended Categorical Eligibility can also be given to children within the same family when a child is identified on the Direct Certification Report. If there are three children at your center from the same family and only one is identified through the *Electronic Direct Certification System*, the other two children can be approved for free meal benefits through the Extended Categorical Eligibility. To document that Extended Categorical Eligibility is going to be given to the two other children, write their names *clearly* on the Direct Certification Report by the name of the child identified on the report. Record all children's names and information on the *Master List of Enrolled Children* (ISBE 67-95). The Master List has been updated to include columns with effective dates for both Household Eligibility Applications and Direct Certification. The Master List also includes a box to mark when a child is approved using Extended Categorical Eligibility. The CACFP Annual Enrollment form will validate the children in the family.

IMPORTANT: Documentation must be maintained to show how a child was approved to receive meal benefits. The Extended Categorical Eligibility is good for 12 months.

Electronic Direct Certification System Screens

This document was updated to follow the regulations of the Child and Adult Care Food Program. It was originally written for sponsors of the National School Lunch Program (NSLP), which is why all computer screens are written for local educational agencies (LEAs). Please follow this written document, not the content on the screens, which apply to the NSLP.

Home Page

Direct Certification Home | ISBE HOME | LOGOFF

Illinois State Board of Education

SESSION TIMEOUT 19:57

User Id: RCDT582 RCDT: 04-101-12-2022 - Harlem Unit Sch Dist 122

Home
File Upload Match
Single Child Match
Download Files
Contact Us

Beginning with the school year 2009–2010, Direct Certification in Illinois must be conducted using the Electronic Direct Certification System. The local educational agency (LEA) agrees to follow all rules and regulations regarding the use of this data including confidentiality and disclosure. Such language requirements are found in the School-Based Child Nutrition Programs Permanent Agreement. The LEA qualifies a student for free meals/milk based on data in this system that has been provided by the Illinois Department of Human Services, the state agency that administers the Supplemental Nutrition Assistance Program (SNAP) (formerly the Food Stamp Program) and Temporary Assistance for Needy Families (TANF).

Direct Certification:

- Is the process which LEAs certify children who are members of households receiving assistance under the Supplemental Nutrition Assistance Program and/or Temporary Assistance to Needy Families as eligible for free school meals/milk
- Replaces the requirement for a household to complete the Household Eligibility Application to receive free meal/milk benefits
- Is not subject to verification requirements
- Is a requirement of the National School Lunch Program

Refer to the Direct Certification Guidance Document located [here](#) for additional information and specific requirements about the Direct Certification Process.

File Upload Match

Direct Certification Home | ISBE HOME | LOGOFF

Illinois State Board of Education

SESSION TIMEOUT 19:30

User Id: RCDT582 RCDT: 04-101-12-2022 - Harlem Unit Sch Dist 122

Home
File Upload Match
Single Child Match
Download Files
Contact Us

File Upload Match

An LEA may upload student information to the Electronic Direct Certification System. The system compares student information with SNAP/TANF data. Matched student information will be available in a report or downloadable file on the Download Files page. A report created by the LEA with an uploaded student file is named Sponsor File with the appropriate date. There is no limit to the number of file uploads by an LEA. Once the system has completed the match, you will be automatically transferred to the Download Files page. The most current file will be the bottom file.

The file format for this upload file match must be a comma delimited file with the following fields:

- First name
- Last name
- Gender (F = female, M = male)
- Birth date (month/day/year, 01/01/1970)

Refer to the Direct Certification Guidance Document which is located [here](#) for complete information on creating a comma delimited file or if you are unable to provide the four required fields.

Select a File to Upload

Select a File Browse..

Upload

Single Child Match

Illinois State Board of Education

Direct Certification Home ISBE HOME LOGOFF

SESSION TIMEOUT 19:57

User Id: RCDT582 RCDT: 04-101-12-2022 - Harlem Unit Sch Dist 122

Single Child Match

An LEA may look up a single student using two different search criteria:

1. SNAP/TANF case number or
2. first name, last name, and city.

When you look up a single child by Case Number, use the SNAP/TANF 10-13 digit case number.

When you look up a single child by Name and Address, the first and last name are required fields. The city is an optional field.

Lists with child(ren) that match exactly or that are close will appear. Each LEA must select the child(ren) that is (are) enrolled in their school by selecting Add to Report. When the LEA completes their search, select Edit Report to review the children names or Print Report to print the report for your records.

Select a Search Criteria

Case Number Name and Address

Search Criteria

Case Number

Search

Download Files

Illinois State Board of Education

Direct Certification Home ISBE HOME LOGOFF

SESSION TIMEOUT 19:58

User Id: RCDT582 RCDT: 04-101-12-2022 - Harlem Unit Sch Dist 122

Download File

Each public school district LEA will have a download file named Annual. This file is created one time per year by ISBE to compare students enrolled in the Student Information System with the June SNAP/TANF file. The Annual file will be available no later than July 1. Public school districts are encouraged to update student eligibility using the Annual file first.

If any LEA uploads a file with student information to match to the SNAP/TANF database, the download file(s) will be named Sponsor File with the appropriate date.

For each file, the LEA must select Download or Print.

Select a file to Download

File Type	Match Date	Download	Print
Annual	6/25/2009 3:29:49 PM	Download	Print

Contact Us

Illinois State Board of Education

Direct Certification Home ISBE HOME USDFP

Illinois State Board of Education SESSION TIMEOUT 19:58

User Id: RCDT582 RCDT: 04-101-12-2022 - Harlem Unit Sch Dist 122

Home
File Upload Match
Single Child Match
Download Files
Contact Us

In order to assist local educational agencies with the Electronic Direct Certification Process, we developed a guidance document which is located [here](#) specific to this system. Please carefully review this document as well as the [posted frequently asked questions](#).

If you have questions after reviewing the guidance document, please contact the following:

- For questions specific to IWAS, contact the ISBE Technology Support at 217/558-3600
- For questions specific to the Electronic Direct Certification System or Process, contact ISBE Nutrition Programs Division at 800/545-7892 or 217/782-2491. An electronic mail message may also be sent to cnp@isbe.net.

How to Create a Comma-Delimited File

There are two options for creating your comma-delimited file. The first option is to use Microsoft® Excel and the second option is to use Notepad. Below you will find instructions for both options. Also keep in mind that the required fields are extremely case sensitive and will not download if any fields are entered incorrectly or out of order.

EXCEL—Follow the steps below to create a comma-delimited file using Microsoft® Excel.

Step One: Open Microsoft® Excel.

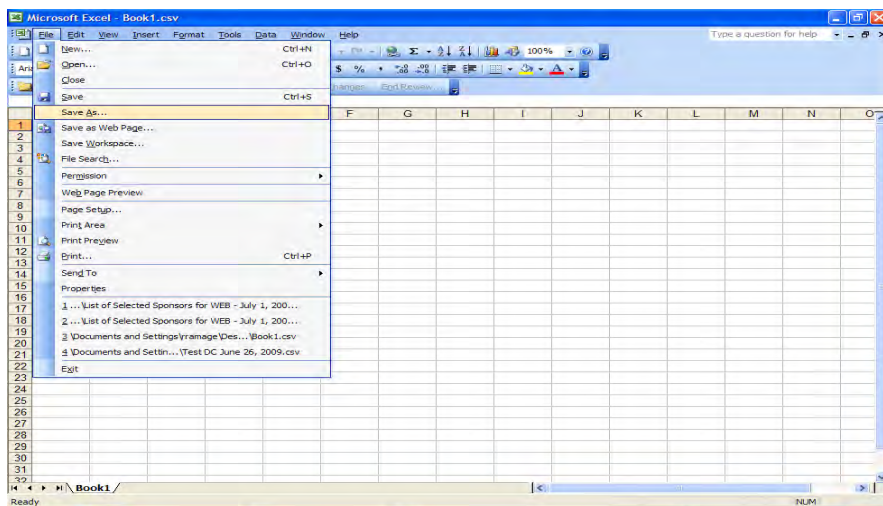


Step Two: Enter the required data. The file format is as follows:

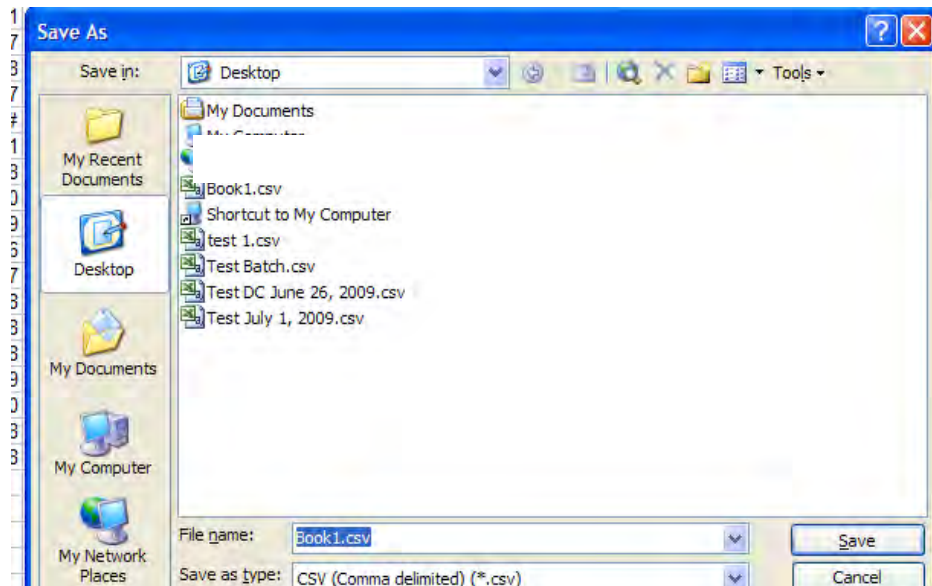
- Column A: First Name
- Column B: Last Name
- Column C: Gender (F = Female, M = Male)
- Column D: Birth Date (Month/Day/Year, 01/01/1970)
- Column E: Unique Identifier (Optional)

The number of children entered will vary by sponsor. Once the file contains all of the required data for all children you wish to upload, proceed to the next step. **NOTE:** File cannot contain a header row and must follow this format exactly.

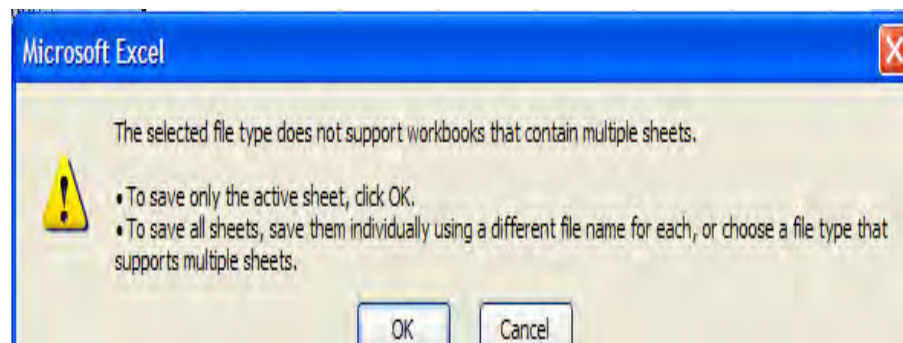
Step Three: Select *File, Save As* from the Excel Menu.



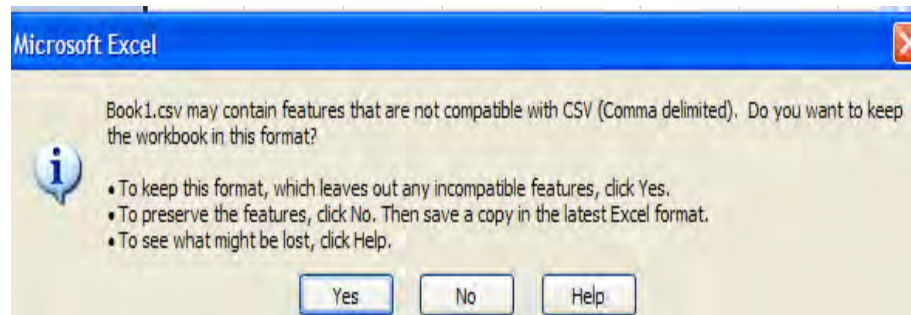
Step Four: Enter a file name as requested. For the *Save as Type*, select CSV (comma-delimited) (*.csv), and then click *Save*.



Step Five: The following message will appear. Click *OK* to save only the active sheet.



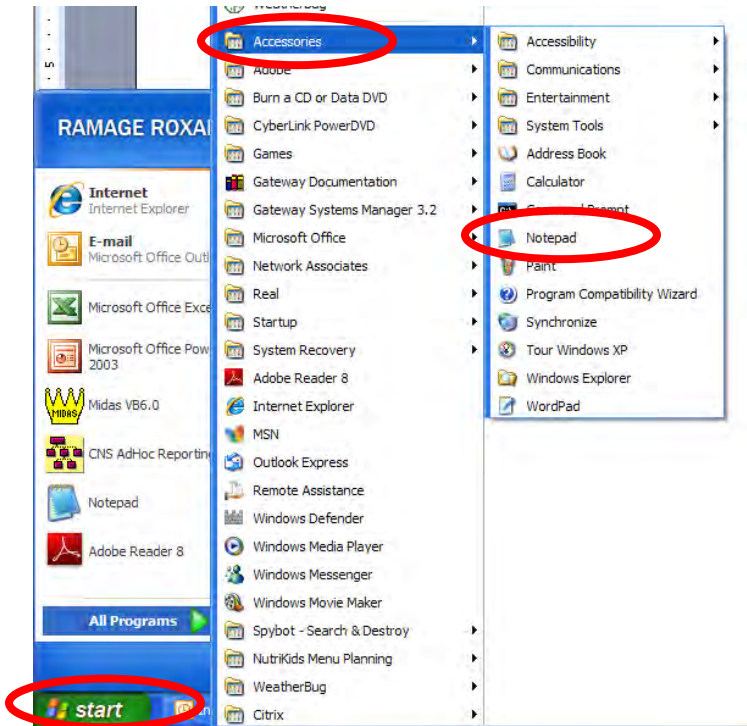
Step Six: The following message will appear. Click *Yes* to keep the file in the CSV format.



Step Seven: The file is now ready to upload to the Electronic Direct Certification System. Follow the directions for the *Sponsor File Upload* found in this Guidance Document.

NOTEPAD—Follow the steps below to create a comma delimited file using Notepad.

Step One: Open Notepad. It can be accessed by clicking on *Start*, *Accessories*, and then *Notepad*.



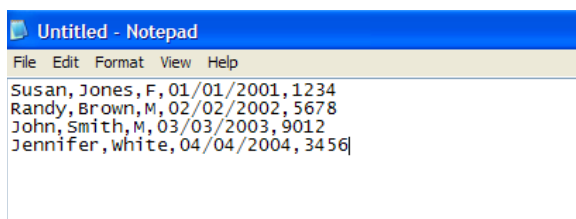
Step Two: Enter the required data. The file format is as follows:

First Name,Last Name,Gender (F = Female, M = Male),Birth Date (Month/day/year, 01/01/1970), Unique Identifier (Optional)

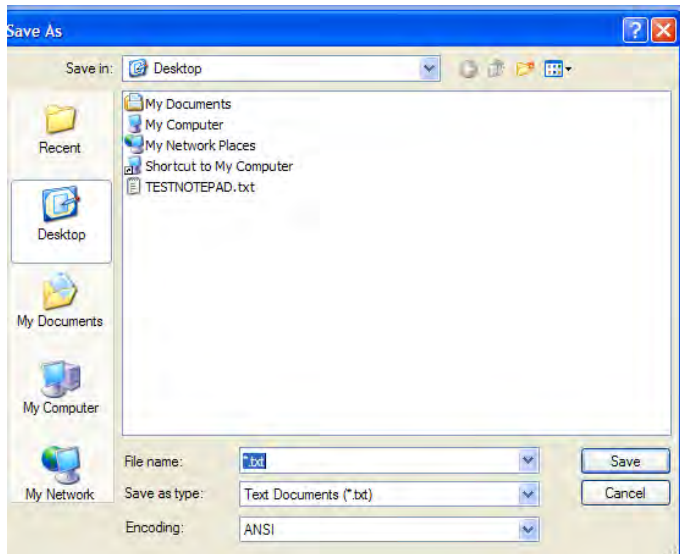
Example: Susan,Jones,F,01/01/2001,1234

DO NOT include spaces in the file format.

After each record, select *Enter*.



Step Three: Enter a *File Name* and select *Save*. Make sure the *Save as type* is *Text Documents (*.txt)*.



Step Four: The file is now ready to upload to the Electronic Direct Certification System. Follow the directions for the *Sponsor File Upload* found in this Guidance Document.

Sample: Annual Report

Printed On: 7/2/2009 1:52:21 PM

Illinois State Board of Education

Direct Certification Annual Report Based on Program

Participation in July 2009

Agreement Number: 48-072-31-6004

100 North First Street Springfield, Illinois 62777-0001

An Equal Opportunity/Affirmative Action Employer

Jesse H. Ruiz

Christopher A. Koch, Ed.D.

Chairman

State Superintendent of Education

User First Printed On 7/2/2009 1:13:56 PM

Limestone Walters Elem School

EXACT Matches:

First Name	Last Name	Birth Date	Sex	Case Number	Street Address	City	State	Zip
		01/02/2001	M	94-080-22-		HANNA CITY	IL	61536
		07/25/1997	F	94-080-22-		BARTONVILLE	IL	61607

Total Number of EXACT Matches: 2

CLOSE Matches:

First Name	Last Name	Birth Date	Sex	Case Number	Street Address	City	State	Zip
		08/05/2003	M	96-080-22-		BARTONVILLE	IL	61607
		07/11/1999	M	94-080-22-		BARTONVILLE	IL	61607

Total Number of CLOSE Matches: 2

Total Number of Records: 4

Sample: Sponsor Report

Printed On: 7/7/2009 2:34:35 PM

Illinois State Board of Education

Direct Certification ~~Sponsor Report~~ Based on Program

Participation in July 2009

Agreement Number: 55-098-00-5026

100 North First Street Springfield, Illinois 62777-0001

Jesse H. Ruiz
Chairman

An Equal Opportunity/Affirmative Action Employer

Christopher A. Koch, Ed.D.
State Superintendent of Education

User First Printed On 7/7/2009 2:34:35 PM

EXACT Matches:								
First Name	Last Name	Birth Date	Sex	Case Number	Street Address	City	State	Zip
		07/29/2000	M	94-057-22-		LAKE ZURICH	IL	60047
		11/05/1997	M	04-225-01-		CHICAGO	IL	60624
		04/24/2001	F	94-057-22-1		LAKE ZURICH	IL	60047
		02/03/2000	M	94-057-1-		LAKE ZURICH	IL	60047
		11/18/2000	M	94-057-22-		LAKE ZURICH	IL	60047
		04/13/2002	M	94-030-22-		LOMBARD	IL	60148
		08/15/2000	M	94-057-22-		LAKE ZURICH	IL	60047
		02/25/2003	F	94-057-22-1		LAKE ZURICH	IL	60047
		04/05/1998	M	94-233-22-		PALATINE	IL	60074
		08/07/1998	M	94-057-22-		LAKE ZURICH	IL	60047
		06/04/2001	F	94-057-22-		LAKE ZURICH	IL	60047
		02/04/1998	F	94-057-22-		LAKE ZURICH	IL	60047

Total Number of EXACT Matches: 12

Total Number of Records: 12

Sample: Single Child Lookup Report

Printed On: 7/7/2009 3:11:25 PM

Illinois State Board of Education Direct Certification Single Child Lookup Report Agreement Number: ---

100 North First Street Springfield, Illinois 62777-0001

An Equal Opportunity/Affirmative Action Employer

Jesse H. Ruiz

Christopher A. Koch, Ed.D.

Chairman

State Superintendent of Education

First Name	Last Name	Birth Date	Sex	Case Number	Street Address	City	State	Zip
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EXACT Matches

		12/14/2006	F	96-107-22-		JOLIET	IL	60431
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Total Number of EXACT Matches: 1

CLOSE Matches

		02/28/2001	F	94-109-22-		ROCKFORD	IL	61101
		12/08/1992	M	94-213-22-		CHICAGO	IL	60827

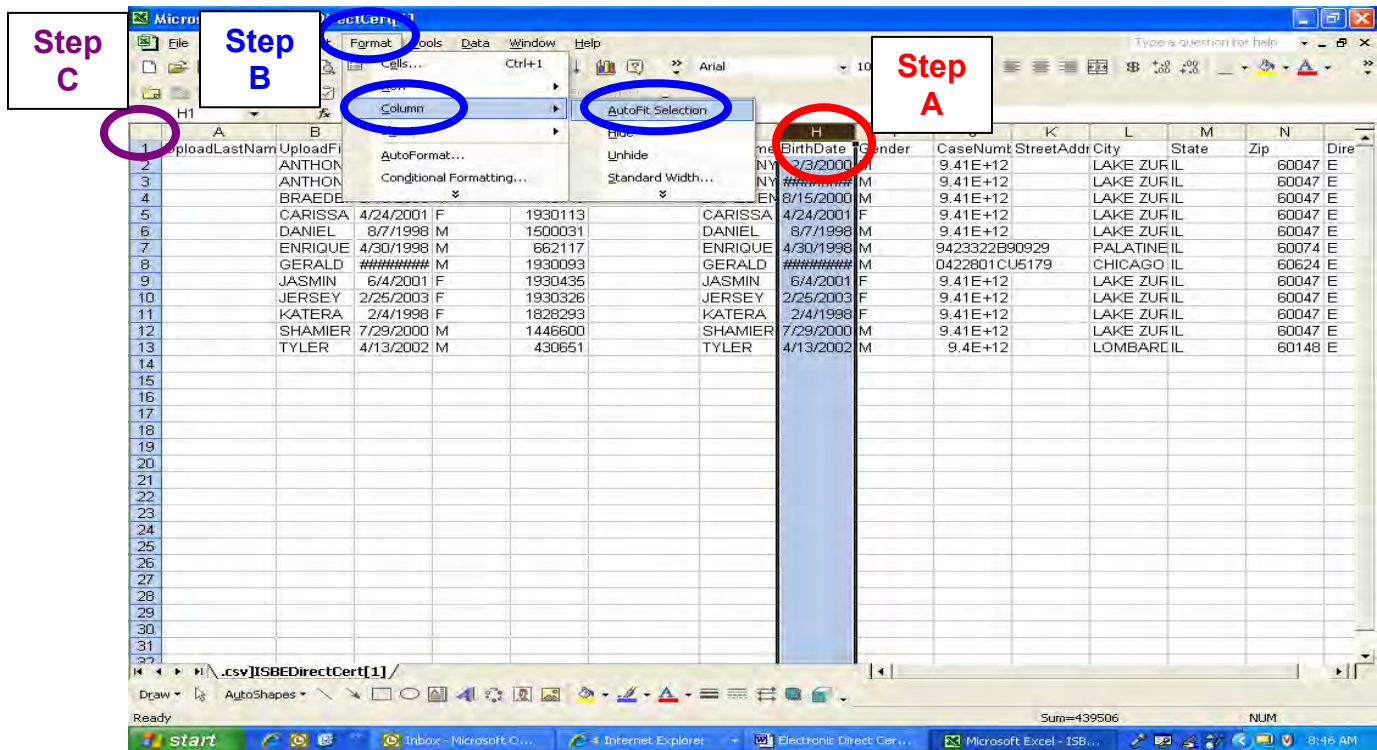
Total Number of CLOSE Matches: 2

Total Number of Records: 3

Downloading a Direct Certification File

If you choose to download a file in the *Electronic Direct Certification System*, in some instances, the information will be displayed in a format that must be modified. School technology staff can assist with most of these issues. A few of the common issues found are listed below:

- 1) The fields are symbols instead of numbers or the same cells do not show the entire field of data.
 - a. This can be fixed for each column by highlighting the column you wish to fix (hover over the letter at the top of the column, an arrow will appear, then click with your mouse to highlight that column).
 - b. Once the column is highlighted, select *Format* at the top of the screen, then select *Column*. Additional options will appear. Select *Auto Fit Selection*. The column will now display all data.
 - c. This can also be fixed for the entire sheet. Using your mouse, go to the upper left hand corner of the Excel sheet and click on the box between the letter A and the number 1; this will highlight the entire sheet. (See Step C below.) Then follow Step b above.



- 2) The Case Number (Column J) looks like symbols. To correct this problem follow the instructions below:
 - a. Highlight Column J (hover over the letter J at the top of the column, an arrow will appear, then left-click with your mouse to highlight that column).
 - b. Click *Format* at the top of the screen and click on *Cells*
 - c. A *Format Cells* dialogue box will appear. Select *Numbers*. Under *Category*, select *Number*. Then modify the number of decimal places to zero.
 - d. Click *OK*.

