### eFORMAT Parent Portal User Guide

Electronic Free or Reduced Meal Application Tracking

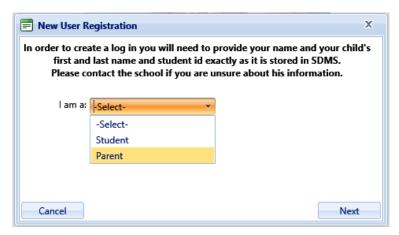
Welcome to the eFORMAT Parent Portal. In just a few steps, you can create a Free and Reduced Meal application for your family members. Listed below are the steps you will need to complete to create a Parent Portal account and the steps needed to create an application.

# Step 1

To create a parent user account, click on "New User Registration".



- Click on the arrow by "I am a" and select "Parent".
- Click "Next".



- Enter your first and last name.
- Enter your email address, if any.
- Enter your student's Student ID number.
- Enter your student's first and last name.
- Click "Finish"

NOTE: You must enter your student's Student ID, first name, and last name exactly as it is recorded in the Student Information System to successfully create a login account.



# Step 4

- Enter a user ID for your account.
- Enter a password which meets all the following requirements:
  - The password must contain a number
  - The password must contain a lowercase letter
  - The password must contain an uppercase letter
  - The password must be between 8 and 20 characters long

NOTE: As the requirements for passwords may vary, please follow the password rules for your district.

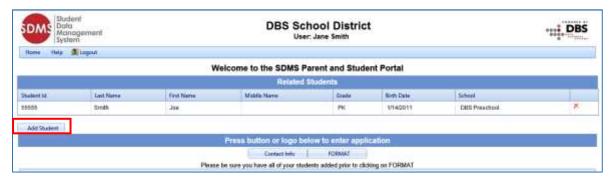
- Enter a security question that can be used to verify your identity if you need to reset your password in the future. For example, the name of your first car or where you grew up.
- Click "Continue" when all required fields have been entered.



- You will now see the site's login screen.
- Enter your user ID that you created in Step 4.
- Enter your password that you created in Step 4.
- Click "Log In".



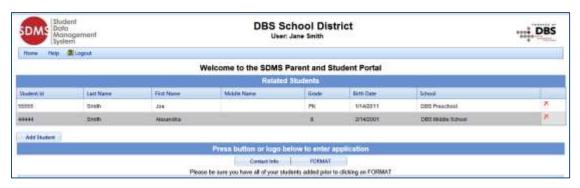
- The Welcome screen you are viewing now lists the students that are related to you in SDMS. The child listed as part of the enrollment process is listed.
- It is important to be sure all your family members are listed on this screen. If they are not listed here, you will not be able to include them in the application.



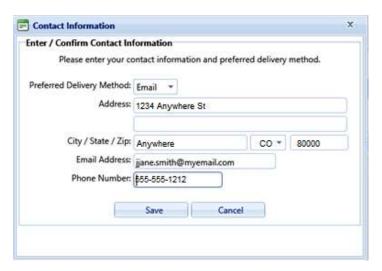
- To add additional family members, click the "Add Student" button.
- If you do not need to add additional family members, proceed to Step 7.
- In the pop-up screen, enter the student's Student ID, first name, and last name.
- Click "Continue".



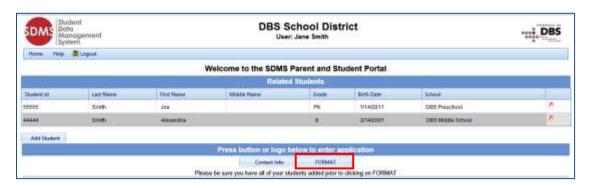
The student will now appear in the list.



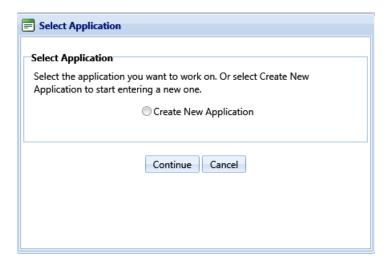
- Click on the "Contact Info" button.
- You are required to enter your contact information on this screen before you can complete an application.
- The address information is required.
- An email address is required if you prefer to receive electronic correspondence instead of regular mail.
- Click "Save" when all information has been entered.



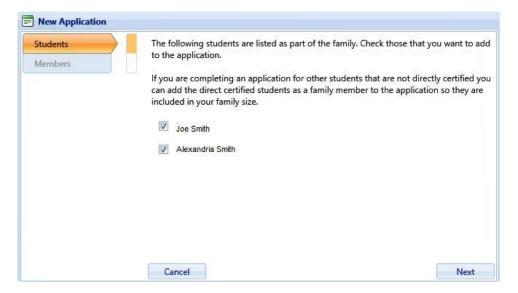
- You will be returned to the Welcome screen and are ready to enter an application.
- Click on the "FORMAT" button.



- Click the button next to "Create New Application".
- Click "Continue".



- In this step, you will see all patrons who are part of your family.
- Checking the box next to the name will add them to the new application you are creating.
- · Click "Next".



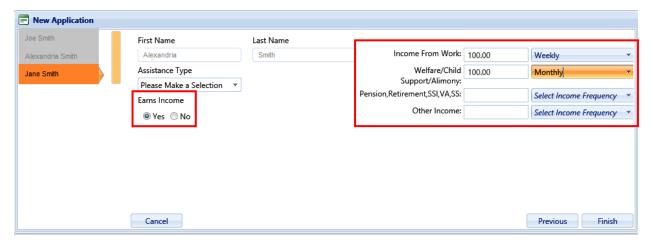
- In this screen, you will see your name listed, as well as additional guardians or members of your family that were included on prior applications.
- Your name is checked by default.
- You will need to check any additional members you would like to be included on the application.
- Click "Next".



- This screen contains required information for each student and member.
- If the student receives any type of assistance, use the drop-down to choose the type or choose "None of These".
- For the assistance type, you must enter your case number.
- All fields must have a response to proceed to the next screen.
- You will be required to fill out the information for each member listed on the left side of the screen.
- Click "Next" to proceed through each student's screen.



- The member screen requires a response to assistance type and income.
- If a member receives any type of assistance, use the drop-down to choose the type or choose "None of These".
- If you choose "Yes" for the assistance type, you must enter your case number.
- If any member has income, click "Yes" by "Earns Income".
- You must enter the amount and frequency for at least one income category.
- You must choose how frequently you receive the income: weekly, every two
  weeks, monthly, or annually if that option is available.
- All fields must have a response to proceed to the next screen
- Click "Finish" when all information for all members has been entered.



- The screen displays the required statements associated with your application process.
- The contents of the screen are listed below for your convenience.
- Read the entire disclosure and click "Continue" when finished.

The Richard B. Russell National School Lunch Act requires the information on this application. You do not have to give the information, but if you do not, we cannot approve your child for free or reduced price meals. You must include the last four digits of the social security number of the adult household member who signs the application. The social security number is not required when you apply on behalf of a foster child or you list a Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF) Program or Food Distribution Program on Indian Reservations (FDPIR) case number or other FDPIR identifier for your child or when you indicate that the adult household member signing the application does not have a social security number. We will use your information to determine if your child is eligible for free or reduced price meals, and for administration and enforcement of the lunch and breakfast programs. We MAY share your eligibility information with education, health, and nutrition programs to help them evaluate, fund, or determine benefits for their programs,

auditors for program reviews, and law enforcement officials to help them look into violations of program rules. The U.S. Department of Agriculture (USDA) prohibits discrimination against its customers, employees, and applicants for employment on the bases of race, color, national origin, age, disability, sex, gender identity, religion, reprisal and, where applicable, political beliefs, marital status, familial or parental status, sexual orientation, or all or part of an individual's income is derived from any public assistance program, or protected genetic information in employment or in any program or activity conducted or funded by the Department. (Not all prohibited bases will apply to all programs and/or employment activities.) If you wish to file a Civil Rights program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, found online at

http://www.ascr.usda.gov/complaint\_filing\_cust.html, or at any USDA office, or call (866) 632-9992 to request the form. You may also write a letter containing all of the information requested in the form. Send your completed complaint form or letter to us by mail at U.S. Department of Agriculture, Director, Office of Adjudication, 1400 Independence Avenue, S.W., Washington, D.C. 20250-9410, by fax (202) 690-7442 or email at <a href="mailto:program.intake@usda.gov">program.intake@usda.gov</a>. Individuals who are deaf, hard of hearing, or have speech disabilities and wish to file either an EEO or program complaint please contact USDA through the Federal Relay Service at (800) 877-8339 or (800) 845-6136 (in Spanish). Persons with disabilities who wish to file a program complaint, please see information above on how to contact us by mail directly or by email. If you require alternative means of communication for program information (e.g., Braille, large print, audiotape, etc.) please contact USDA's TARGET Center at (202) 720-2600 (voice and TDD). USDA is an equal opportunity provider and employer.

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program.intake@usda.gov.Individuals who are deaf, hard of hearing, or have speech disabilities and wish to file either an EEO or program complaint please contact USDA through the Federal Relay Service at (800) 877-8339 or (800) 845-6136 (in Spanish).

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# Step 13

- The next screen contains detailed information on how to correctly report benefits and income, along with a detailed definition of each benefit/income type.
- The contents of the screen are listed below for your convenience.
- Click "Continue".

#### INSTRUCTIONS FOR APPLYING

Please read this in its entirety before proceeding.

#### A HOUSEHOLD MEMBER IS ANY CHILD OR ADULT LIVING WITH YOU.

# IF ANY HOUSEHOLD MEMBER RECEIVES BENEFITS FROM SNAP, TANF, OR FDPIR, AND THAT FAMILY MEMBER IS A STUDENT FOLLOW THESE INSTRUCTIONS:

- 1. Go to Students: Make sure the student(s) receiving benefits from an Assistance Program have their case numbers entered and all students in the family are listed.
- 2. Go to Household Members: If not already listed, add the household member who will be electronically signing the application. You do not need to enter income information.
- 3. Go to Sign Application: Sign the form. The last four digits of a Social Security Number are not necessary, you can select No SSN. Contact information is optional but recommended if we need to contact you.

# IF ANY HOUSEHOLD MEMBER RECEIVES BENEFITS FROM SNAP, TANF, OR FDPIR, AND THAT FAMILY MEMBER IS NOT A STUDENT FOLLOW THESE INSTRUCTIONS:

- 1. Go to Students: Make sure all students in the family are listed. You do not need to enter income information for students.
- 2. Go to Household Members: If not listed, add the family member who is receiving the benefits and add them including their case number.
- 3. If not already listed, add the household member who will be electronically signing the application. You do not need to enter income information.
- 4. Go to Sign Application: Sign the form. The last four digits of a Social Security Number are not necessary you can select No SSN. Contact information is optional but recommended if we need to contact you.

# IF NO ONE IN YOUR HOUSEHOLD GETS SNAP, TANF, OR FDPIR BENEFITS AND IF ALL CHILDREN IN THE HOUSEHOLD ARE HOMELESS, A MIGRANT OR RUNAWAY, OR ATTEND A HEAD START OR EVEN START PROGRAM FOLLOW THESE INSTRUCTIONS:

- 1. Go to Students: Make sure all students in the family are listed. Indicate which of the above situation applies to each student. You do not need to enter income information.
- 2. Go to Household Members: Add the household member who will be electronically signing the application. You do not need to enter income information.
- 3. Go to Sign Application: Sign the form. The last four digits of a Social Security Number are not necessary you can select No SSN. Contact information is optional but recommended if we need to contact you.
- 4. Contact the school liaison for further assistance.

IF NO ONE IN YOUR HOUSEHOLD GETS SNAP, TANF, OR FDPIR BENEFITS AND IF ANY, BUT NOT ALL, OF THE CHILDREN IN YOUR HOUSEHOLD ARE HOMELESS, A MIGRANT OR RUNAWAY, OR ATTEND A HEAD START OR EVEN START PROGRAM FOLLOW THESE INSTRUCTIONS:

- 1. Go to Students: Make sure all students in the family are listed. Indicate which of the above situation applies to the student. If the child earns a steady income enter that information.
- 2. Go to Household Members: Enter all household members that are not students. Enter any steady income received for each household member.
- 3. Go to Sign Application: Sign the form. The last four digits of a Social Security Number are not necessary you can select No SSN. Contact information is optional but recommended if we need to contact you.

IF NO ONE IN YOUR HOUSEHOLD GETS SNAP, TANF, OR FDPIR BENEFITS AND IF NO CHILD IS HOMELESS, A MIGRANT OR RUNAWAY, OR ATTEND A HEAD START OR EVEN START PROGRAM AND ALL CHILDREN ARE FOSTER CHILDREN FOLLOW THESE INSTRUCTIONS:

- 1. Go to Students: Make sure all students in the family are listed. Indicate that they are foster children.
- 2. Go to Household Members: Add the household member who will be electronically signing the application. You do not need to enter income information.
- 3. Go to Sign Application: Sign the form. The last four digits of a Social Security Number are not necessary you can select No SSN. Contact information is optional but recommended if we need to contact you.

IF NO ONE IN YOUR HOUSEHOLD GETS SNAP, TANF, OR FDPIR BENEFITS AND IF NO CHILD IS HOMELESS, A MIGRANT OR RUNAWAY, OR ATTEND A HEAD START OR EVEN START PROGRAM AND IF ANY, BUT NOT ALL CHILDREN ARE FOSTER CHILDREN FOLLOW THESE INSTRUCTIONS:

- 1. Go to Students: Make sure all students in the family are listed. Indicate which student(s) is a foster child. If the student earns a steady income enter that information.
- 2. Go to Household Members: Enter all household members that are not students. Enter any steady income received for each family member.

3. Go to Sign Application: Sign the form and list the last four digits of their Social Security Number or mark No SSN if you do not have one. Contact information is optional but recommended if we need to contact you.

#### ALL OTHER HOUSEHOLDS, INCLUDING WIC HOUSEHOLDS, FOLLOW THESE INSTRUCTIONS:

- 1. Go to Students: Make sure all students in the family are listed. If the child earns a steady income enter that information.
- 2. Go to Household Members: Enter all household members that are not students. Enter any steady income received for each family member.
- 3. Go to Sign Application: Sign the form and list the last four digits of their Social Security Number or mark No SSN if you do not have one. Contact information is optional but recommended if we need to contact you.

#### **DEFINITIONS OF INCOME**

#### Income Of A Child

 Only include income if it is from a steady source. Occasional babysitting or odd jobs should not be included.

#### Income From Work

- Wages, salaries, tips, commissions
- Net income from self-owned business and farms
- Strike benefits, unemployment compensation, and worker's compensation

#### Welfare, Child Support, Alimony

- Public assistance payments/welfare benefits (e.g., TANF, General Assistance, General Relief)
- Alimony or child support payments
- Note: Benefits under SNAP and FDPIR are not counted as income.

#### Pension, Retirement, SSI, VA, Social Security

- Pensions, retirement income, veterans' benefits
- Social security
- Supplemental security income
- Disability benefits

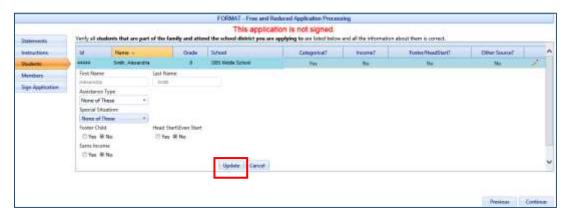
#### Other Income

- Net rental income, annuities, net royalties
- Interest; dividend income
- Cash withdrawn from savings; income from estates, trusts and/or investments
- Regular contributions from persons not living in the household
- Any other money that may be available to pay for the child(ren)'s meals

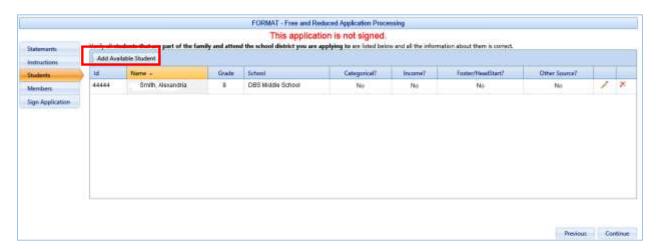
- In this screen, your students are listed and show the Free and Reduced options that you selected in the members' screens in Step 11.
- If you wish to change any information, click on the Pencil icon next to the appropriate student's name.



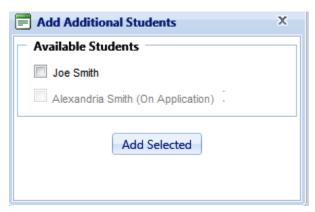
- In this screen, you can edit your student's information.
- Make any desired changes.
- Click "Update" to save your changes.
- If you need to edit another student, click on the Pencil icon and repeat these steps.



 If you need to add an additional student to the application, click the "Add Available Student" button.

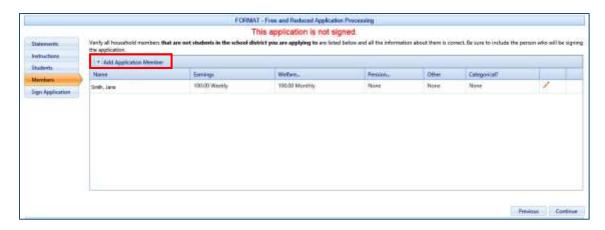


 The pop-up box will list any student that is a family member or was included on a previous application.

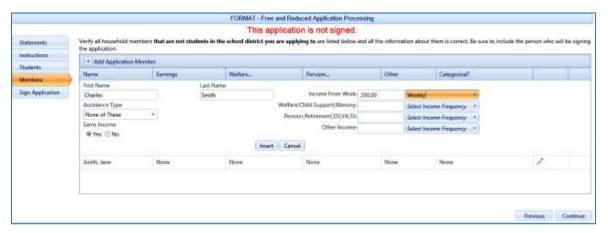


- Click the checkbox next to the student's name to be added to the application and click "Add Selected".
- The newly added student will now appear in the list.
- Click "Continue" when all changes are complete.

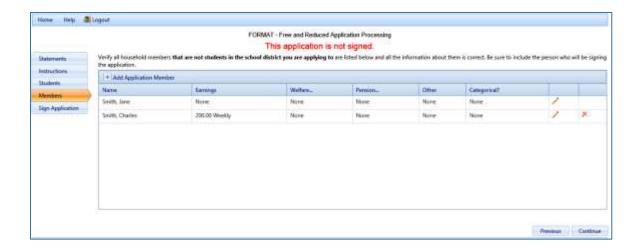
- On this screen, your members are listed.
- To edit an existing member, click the Pencil icon.
- Repeat the steps you followed in Step 14, being sure to click "Update" when all changes are complete.
- If you need to add an additional member, click the "Add Application Member" button.



- On the edit screen, enter the first and last name of the member.
- Enter all required information including choosing the assistance type.
- Enter income information if you choose "Yes" by "Earns Income".
- Enter the amount and frequency of the income.
- Click "Insert" to add the member to the application.



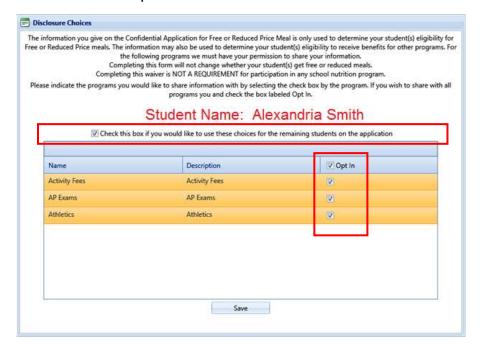
- You will now see the newly added member in the list of application members.
- Click "Continue".



- If all students and guardians have been added to the application, you are now ready to electronically sign the application.
- You will need to enter the last 4 digits of your Social Security Number or click the checkbox "No SSN/Not Applicable".
- Choose the language, English or Spanish, you prefer to receive correspondence in that will be generated from this application.
- You will enter the password you specified for when you registered for your account.
- When all information has been entered, click "Sign Application" to complete the process.



- If your school district uses disclosure choices, you are given the opportunity to select them in this screen.
- By checking Opt-In beside a program, you are allowing meal status information to be disclosed to that program.
- You can check Opt-In in the title bar to select all programs at once.
- To use these same disclosure choices for all students on the application, check the box highlighted in red below.
- Click "Save" when completed.



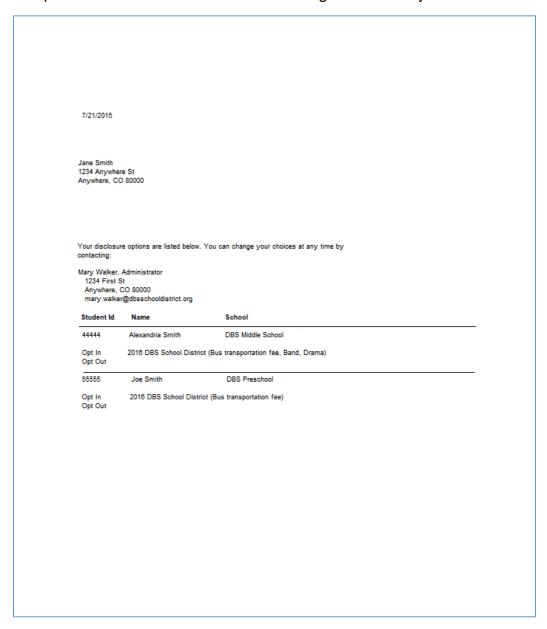
- You will now see the Confirmation screen which shows that you have successfully signed your application.
- At this point, the application is complete.
- If your district uses Disclosure Choices, you can download the Disclosure Letter which will indicate what programs you chose to Opt-In for each student on the application by clicking the "Download Disclosure" link.
- You can download the Determination Letter which will indicate the students included on the application, the meal status for each student, and contact information if you have any questions or issues about your students' benefits.



• You will be prompted to open or save each letter.



Sample of the Disclosure Letter that will be generated for your records.



Sample of the Determination Letter that will be generated for your records.

7/21/2015

Jane Smith 1234 Anywhere St. Anywhere, CO 80000

PLEASE KEEP THIS LETTER FOR YOUR RECORDS. If a duplicate letter is required, one may be provided for a fee of \$3.00 and must be picked up at the Nutrition Office at 10850 E. Woodman Rd., Falcon, Co 80831. An emailed copy can be sent at no charge. Students approved for reduced price meals in grades Pre-school to fifth will receive lunch at no charge for the 2014-2015 school year. Students approved for reduced price meals in grades 6-12 will be charged \$.40 for lunch. All students approved for reduced price meals will receive free breakfast, where breakfast is served, for the 2015-2016 school year.

If you do NOT want your child(ren) to receive Free meals or have questions, please contact James Dobbs at 555-555-3333

If you have any questions about this decision, please call: Carol Walker

If your application was denied, you may reapply for benefits at any time during the school year. If you are not eligible now, but have a decrease in income, an increase in household size, or qualify for food stamps, you may complete another application at that time.

Name	Benefit Level	Reason
Alexandria Smith (44444) - (DBS Middle School)	Free	Income Within Limits
Joe Smith (55555) - (DBS Preschool)	Free	Income Within Limits

If you still do not agree with the decision, and would like to appeal, you may discuss it with a school official, Mrs. Jones. at 555-565-2121

Sincerely,

Carol Walker DBS School District 5432 E. School St. Anywhere, CO 80000 555-555-2222

\*Categorical - Someone in the family is receiving federal or state assistance

\*\*Other Source - The child is foster, homeless, migrant, runaway or part of a Head Start program.

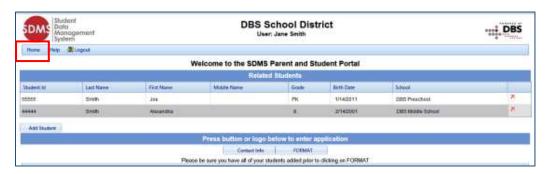
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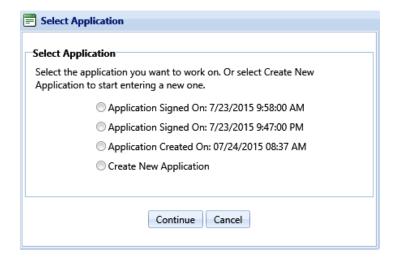
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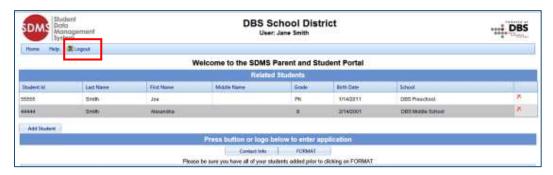
• To return to the Welcome screen, click the "Home" button.



- If you want to create a new application or view the signed application you just completed, click on the FORMAT button.
- The screen will list all applications and give you the option to create a new application.
- If you choose to create a new application, check the button next to "Create New Application" and click "Continue". Refer back to Step 9.
- If you choose to continue an application that you created, but did not sign, click the button next to "Application Created...." and click "Continue". Refer to Step 12.
- If you choose to review a signed application, check the button next to "Application Signed..." and click "Continue". Proceed to Step 21.
- Click "Cancel" to exit the screen and return to the Welcome screen.



Click "Logout" to end your session.



# Step 21

If the application has been signed, you will see the screen displayed below.



- This screen shows all students included on the application, their determination status, and income related data.
- You can print the application by clicking on "Print Application" in the upper right hand corner of the screen.
- You can also print the Determination letter by clicking on "Print Determination" if you did not print it in Step 18.
- You can decline the benefits provided on this application by clicking the "Decline Benefits" button. This will cause the application to be disregarded when determining the student's meal status.
- You will be required to submit a new application to re-apply for benefits.

# **Password Recovery**

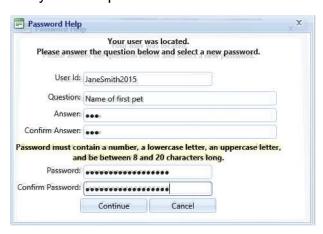
• If you forget your password, you can click "Password Recovery" from the main login screen to start the reset process.



You will be prompted to enter your user ID you created in Step 4.



- Once your user name is confirmed in the system, the next screen prompts you to answer the security question you created in Step 4.
- You can then enter your new password.



- If you have entered the correct information, clicking "Continue" will take you back to the site's login screen.
- Enter your user ID and newly created password to access the application Welcome screen.

