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".



Step 2

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

📰 New User R	egistration		x
first and	ate a log in you will need to last name and student id ex ontact the school if you are u	actly as it is stored in SDMS.	
l am a:	-Select-		
	-Select-		
	Student		
	Parent		
Cancel			Next

Step 3

- 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.

📄 New User Registra	ation		x
Your First Name:	Jane		
Your Last Name:	Smith		
Email Address:	jane.smith@myemail.com	•	
Student Id:	55555		
Student First Name:	Joe		
Student Last Name:	Smith	×	
Cancel		Previous Finis	h

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.

Plea	Your student information has been verfied. use enter the following information to create a user account	unt.
	ease enter the following information to create a user account	
User Id:	JaneSmith2015	
Password	d must contain a number, a lowercase letter, an upperca	se letter,
	and be between 8 and 20 characters long.	
Password:		
Confirm Password:	•••••	
	estion and Answer will enable you to reset your passwor n that has an answer that can not be easily figured out b	
	n that has an answer that can not be easily figured out b	
Select a question	n that has an answer that can not be easily figured out b Name of first pet	
Select a question Security Question:	n that has an answer that can not be easily figured out b Name of first pet	
Select a question Security Question: Security Answer:	n that has an answer that can not be easily figured out b	
Select a question Security Question: Security Answer: Confirm Security	n that has an answer that can not be easily figured out b	
Select a question Security Question: Security Answer: Confirm Security	n that has an answer that can not be easily figured out b Name of first pet	

Step 5

• 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.

SDMS Man Syste	agement		DBS Schoo User: Jan				DBS
Home Help	Logeut						
		Welcor	me to the SDMS Parer	nt and Student	Portal		
			Related Stud	ents			
Student Id	Last Name	First Name	Middle Name	Grade	Birth Date	School	
55555	Smith	Jse		PK	1/14/2011	DBS Preschool	×
Add Student	Smith					DBS Preschool	~
		Pre	as button or logo below	to enter applicat			
			Contact Info	FORMAT			
		Biogen be sur	e you have all of your students a	utried refer to difering	on EORMAT		

- 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".

Add Student	2	x
Student Information		
In order to add a student you w exactly as it is stored in SDMS.	ill need to know the first and last name and student id	1
Student Id:	44444	
Student First Name:	Alexandria	
Student Last Name:	Smith ×	
Co	ntinue Cancel	

The student will now appear in the list.

Data Manage System	ment			chool Dist	rict		
Home Help 🚮 b	agoat						
		w	come to the SDMS	Parent and St	ident Portal		
			Relate	d Students			
Student Id	Last Name	First Name	Middle Name	Grade	Birth Date	School	
55565	Smith	Jae		PK	1/14/2011	DBS Preschool	×
44664	Smith	Alexandria		8	2/14/2001	DBS Middle School	×

Step 7

- 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.

Contact Information		x
Enter / Confirm Contact Inf	ormation	
Please enter your co	ntact information and preferred delivery method.	
Preferred Delivery Method: Address:	Email 💌 1234 Anywhere St	
City / State / Zip:	Anywhere CO • 80000	
Email Address:	jjane.smith@myemail.com	
Phone Number:	\$55-555-1212	
	Save Cancel	

Step 8

• You will be returned to the Welcome screen and are ready to enter an application.

	Cherry				Jaccom		
SDMS Student Data Manager System	ment		DBS Scho User: Jane		t		000
Home Help 💁 Ley	gout						
		Welc	ome to the SDMS Pare	nt and Stude	nt Portal		
			Related Stud	lents			
Student Id	Last Name	First Name	Middle Name	Grade	Birth Date	School	
55555	Smith	Joe		PK	1/14/2011	DBS Preschool	

Click on the "FORMAT" button.

• Click the button next to "Create New Application".

ave all of your students added prior to cli

Click "Continue".

elect Applicatior Select the applicat	tion you want to work on. Or select Create New
Application to star	t entering a new one.
	Create New Application
	Continue Cancel
	Continue Conter

- 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".

Students Members	The following students are listed as part of the family. Check those that you want to add to the application.
	If you are completing an application for other students that are not directly certified yo can add the direct certified students as a family member to the application so they are included in your family size.
	🕅 joe Smith
	Alexandria Smith
	Cancel

Step 10

- 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".



Step 11

- 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.

Assistance Tune Case #	smith 🔶	First Name	Last Name		
SNAP + 123405 X Special Strutton None of These + feator Ohid Stress % No Earn Income Earn Income	xandria Smith	Jóe	Smth		
SAMP • [124007] X Space all Standing None of Home • None of Home • • • Forter Child • • • • © Yee: % to © Yee: % to	Smith	Assistance Type	Case #		
None of These ▼ Forter Child Head StartEven Start ○ Yes: @ No ○ Yes: @ No Earn Income ○ Yes: @ No		SNAP	 1234567 	×	
FosterOMd Head SamtGeen Start O Yes @ No Ves @ No Earns Income		Special Situation:			
© Yes ֎ No		None of These	w.		
Earns Income		Foster Child	Head Start\Even Start		
		Yes I No	🗆 Yes 🐵 No		
O Yes @ No		Earns Income			
		O Yes @ No			
		Cancel			

- 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.

Joe Smith	First Name	Last Name			
Jexandria Smith	Alexandria	Smith	Income From Works	100.00	Weekdy
are Smith	Assistance Type		Welfare/Child	100.00	Monthly
	Please Make a Selection	-	Support/Alimony:		
	Earns Income		Pension, Retirement, SSI, VA, SS:		Select Income Frequency
	® Yes ⊜ No		Other Income:		Select Income Frequency
		•			

- 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.

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".

Step 14

- 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.

				FORMAT - Free and Reduced Ap					
				This application is r	10t signed.				
ements	Veriy al via	dents that are part of the fa	amily and attend	the school district you are applying	to are inted below and	all the information a	bout them is connect.		
nuctions	ld .	Name +	Grade	School	Categorical?	income?	Foster/NextStart?	Other Source?	
sents 🔷	*****	Smith, Alexandria	8	DBG Midde School	Yes.	No	No	No	1
nbers	20020	Smith, Joe	PK	DBIS Preachest	No	No	No	No	1
Application									
Application									
Application									
Application									
Application									
Application									
Application									
Application									
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Application									

- 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.

structions		able Student	ny ana tter	d the school district you are app	aying to are rated below	V and all the infor	mation about them is context.			
udents	d	Name -	6 4	School	Categorical?	Income?	Foster/HeadStart?	Other Source?		
enbers	46464	Smith, Alexandria	8	DBS Middle School	No	No	No	No	1	2

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

Add Additional Students	х
Available Students	
Joe Smith	
Alexandria Smith (On Application)	
Add Selected	

- 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.

Step 15

- 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.

			NT - Free and Reduced Application					
			This application is not sig					
lements	Verity all household members in the application.	that are not students in the school di	strict you are applying to are listed	selow and all the information	about them is con	rect. Be sure to include the	person who will i	se signi
tachicen .	+ Add Application Newton							
micos	Nanc	Earrings	William.	Possion.	Obu	Catogoricali		
n Jeoliation	Sents Jane	100.00 Weekly	100.00 Meethly	Note	New	None	1	

- 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.

Inclines dents mbars In Application Assistance None of Earns Inc @ Yes	ne ce Type f These •	Earnings	ast Name Smith	Kare_)	Pension		ther	Categorical?		
mbern in Application None of Earris Inc	ne ce Type f These •		Last Name	tere-				ther	Categorical?		
n Application First Nam Charles Assistanc None of Earns Inc	ce Type I These -					Income From Work:					
				Inter		hild Support/Alimony Retirement,SS(VA,SS Other Income	200.00	Select Incom	v er Frequency * er Frequency * er Frequency *		
Swith, Ja	ine .	None	No	ne		None	N	one	None	/	

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

			ee and Reduced Applicat					
			application is not s					
tatements	Verify all household members that an the application.	not students in the school district y	ou are applying to are list	ed below and all the inform	ation about them is	correct. Be sure to include the pe	rson who w	il be sign
instructions	+ Add Application Member							
tudents	Name	Earnings	Welfare-	Pension	Other	Categorical?		
lembers	Smith Japa	None	None	None	Note	Note	1	_
ign Application	Smith, Charles	200.00 Weekly	None	None	None	None	1	×

Step 16

• 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.

	FORMAT - Free and Reduced Application Processing	Return To Patron View
	This application is not signed.	
Statements	Planse select the Signer for the application. You MIST click Sign to complete your application.	
Instructions		
Students	Signer Jane Smith	
Members	Last 4 of SSN: *** ** IV Ro SSNNet Application	
Sign Application	Date Signed 7,05,0015	
	Preferred Language: English +	
		Transieure Sign Applicati

Step 17

- 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.

ree or Reduced Price meals. The info the fo Completin Completing th	fidential Application for Free or Reduced Pric mation may also be used to determine your s llowing programs we must have your permiss g this form will not change whether your stu is waiver is NOT A REQUIREMENT for particip build like to share information with by selection programs you and check the box la	tudent(s) eligibility to receive benefits for o on to share your information. Jent(s) get free or reduced meals. ation in any school nutrition program. a the check box by the program. If you wish	ther programs. F
Check this b	Student Name: Ale		-
Name Activity Fees	Description Activity Fees		
AP Exams	AP Exams		
Athletics	Athletics	V	
	Save		

- 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.

Step 19

to you want to open or save Determination.pdf (9/8 KB) from ObenioDieGnOOLCOM?

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

SDMS Stuc Date Mail Syst	agement			DBS School District User: Jane Smith				
Home Help	🚮 Logout							
		w	elcome to the SDMS	Parent and Stu	ident Portal			
			Relate	d Students				
Student Id	Last Name	First Name	Middle Name	Grade	Sinth Date	School		
55655	Smith	Joe		PK	1/14/2011	DBS Preachool	×	
44444	Smth	Alexandria		8	2/14/2001	DBS Middle School	×	
Add Student								
			Press button or logo l	pelow to enter ap	plication			
			Contact Info	FORMAT				
		Please	be sure you have all of your st	wiests added ader to	clicking on FORMAT			

Step 20

- 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.

Select the application you want to work on. Or select Create New Application to start entering a new one.	Select Application	
Application Signed On: 7/23/2015 9:58:00 AM		,
	Appl	ication Signed On: 7/23/2015 9:58:00 AM
Application Signed On: 7/23/2015 9:47:00 PM	Appl	ication Signed On: 7/23/2015 9:47:00 PM
Application Created On: 07/24/2015 08:37 AM	Appl	ication Created On: 07/24/2015 08:37 AM
Create New Application	Creat	te New Application
		Continue Cancel

Click "Logout" to end your session.

System	ient		DBS Scho User: Jane		•		
Hame Help 🚮 Logo	out						
		Welc	ome to the SDMS Pare	nt and Stude	nt Portal		
			Related Stud	ients			
Student Id	Last Name	First Name	Middle Name	Grade	Birth Date	School	
55555	Smith	Joe		PK	1/14/2011	DBS Preschool	×
44444	Smith	Alexandria		8	2/14/2001	DBS Middle School	×

Step 21

Open Save **v** Cancel X

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

	,	Application Sta			intered By: Ja Signed By: Last 4 SSN:	ine Smith			Application Determination	
Students Student Id	Name	Status	Reason	Income	Welfare Inc	Pension Inc	Other Inc	Other Source	Assistance Type	Case Number
44444	Smith, Alexandria	F	Income	None	None	None	None	None	None	None
55555	Smith, Joe	F	Income	None	None	None	None	None	None	None
Members										
Nam	ie 🛛	Income	Wel	fare Inc	Pension In	c Other	Inc As	ssistance 1	Type Case N	lumber
Smith, Jan	e \$1	00.00 We	ekly \$100.0	0 Monthly	None	None	No	one	None	

- 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.

🖻 Password Hel	p	×
No	your password you will need to enter your security answer t all users will have entered this information. our answer enter your User Id below and click Continue.	•
User Id: Jan	eSmith2015	
	Continue Cancel	

- 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.

	Your user w	as located		
Please answe	FOUR USER V	ow and select a new pa	issword.	
User Id:	JaneSmith2015			
Question:	tion: Name of first pet			
Answer				
Confirm Answer:				
		owercase letter, an up	percase letter,	
		d 20 characters long.		
Password:	**********			
Confirm Password:	********			
Confirm 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.

