

# Direct Certification and Direct Verification Webinar

1. Thank you for joining this training session on the Direct Certification and Direct Verification Process. To get started make sure your speakers are on and turned up. Look for the directional arrows on the page. You will use these arrows to navigate through the forward or backward through the presentation. Once you are finished viewing the page, you will need to click the forward button to move to the next slide. If you need to increase the size of the slide, you can use the zoom function to magnify the image. If you do not have speakers, we have posted the narrative so you can print it and read along as you view the slide. **Next slide**
2. In this tutorial, you will learn the basic skills needed to successfully implement this process within your organization. Most importantly, should you have any questions or concerns while processing applications please know that you can call the state office for assistance. We are here to help!  
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3. Today we will take a step-by-step approach for completing the direct certification and direct verification. We will include specific information on where you can locate the instructions and letters Direct Certification and Direct Verification.  
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4. Hopefully by now, you are familiar with our website. The address is [www.doe.in.gov/food](http://www.doe.in.gov/food). If you scroll to the middle of our home page you will find a purple box with the heading “School Nutrition Programs”, circled in red in this snap shot of the website. All of the links referred to in today’s presentation can be found by clicking on the School Nutrition Programs link.  
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5. The first step in the application process is to complete direct certification. Direct certification replaces the traditional paper application and is based on food stamp and TANF benefits. Students are certified eligible for a FREE lunch without parents having to complete an application or the school having to approve an application. Direct certification only qualifies students with free benefits, not reduced benefits.  
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6. Ideally, you want to complete direct certification in July or the first week of August before students return to school and before registration. The direct certification how-to manuals can be found on the School Nutrition Programs website by clicking on Free and Reduced Price Forms. There are two methods of direct certification, STN and Traditional. For instructions on the traditional method where you will upload your student master list, click on Direct Certification Manual. For instruction on the STN method using your student information from the previous year, click on Direct Certification - STN Method Quick Start  
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7. Let’s discuss the two methods of direct certification in greater detail. The STN method uses enrolled student information available at the DOE. This information comes from reports your school has filed with the DOE the previous school year. The Traditional method uses current fall enrollment from your student database and uploads the data to the STN Application Center. After the list is uploaded, the information is used to match against Food Stamp and TANF information for Indiana. The results are more accurate than the STN method but it does take an extra step. If this is the first time you are

completing direct certification or your school is a small school, you will probably want to use the STN method. Both the Traditional and STN methods of direct certification are hosted within the DOE's Student Test Number or STN Application Center at <https://ac.doe.state.in.us/>.

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8. This is the Application Center logon screen. You will need an id and password to login. If you do not have a logon id or password, contact the person in your corporation who files the required STN reports for your school and that person can give you the logon id and password.

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9. Now let's go through the direct certification process. The next two slides will walk you through uploading your master list file as done in the **traditional method**. Once you login to the Application Center, you will see a screen similar to this. You may not have all these choices depending on the permissions you have been given. Click on Data Transfer from the pull-down menu, then click on file transfer to upload your file.

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10. On this screen you will enter information on the file you are uploading. Click the "browse" button to open the "file open dialogue box" where you will select your master list file. Click the arrow to the right of the "file type" field to select the file type. Uploaded data files can be comma delimited, fixed length, or XML. This step is optional and used only in the traditional method. Click on the "transfer data" button.

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11. The next step is to request your download of matches. If you use the STN method, you will skip the file upload and start with this step. Select Administration then Direct Certification Download from the pull down menu. This will request the download of matching data.

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12. Click on the arrow to the right of the "match type" field and select "traditional match" if you uploaded a master file or "STN match" if you are just starting.

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13. Click on the arrow to the right of the "file format" field to select which file type you want for your matches. Most of you will probably select comma delimited.

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14. Click on the arrow to the right of the "match criteria" field to select which matches you want to see. At the beginning of the school year you'll want to select "retrieve all matches". You can rerun direct certification at any time during the school year, and the Indiana Department of Education highly suggestion that schools rerun direct certification during the school year. If you don't want to see all the previously reported names, select "retrieve only new matches". Click on the "request match" button. Next Slide

15. Once you have pressed "Request Match", scroll to the bottom of the page, and you will see a memorandum of agreement. Read through the agreement and select, "I Agree" at the bottom. Next Slide

16. When the matches have been processed, the words "Exact Match" and "Sound Alike Match" will show under the same headings. These are hyper-links to your results files. You can individually click

on each of them to retrieve your results. Where you see “No Data” it means there were no results for that particular match process. Print that sheet and file in your direct certification file. Otherwise, click on the “exact match” link and print the list. [Next Slide](#)

17. Once your Direct Certification list is generated, you will have a list of students who are approved for FREE meals. You must send a letter to households of directly certified students that they have been approved for free benefits and an application should not be completed. You can find the letter on our website under free and reduced price forms, under school meal benefits and then click on direct certification.

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18. Effective August of 2009, any other students who reside in the same household of a student who is directly certified also qualifies for FREE meals. (You will not find this information in the 2008 edition of the Eligibility Guidance Manual but can find it SP 25-2010. The policy states that “if other children in a household are not on the direct certification list, you can directly certify the rest of the students in the household based on the child (or children) who are on the direct certification list. A household is defined as “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.” Parents/Guardians always have the option of declining benefits or could opt to request reduced benefits for their children.

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19. The lookup feature is useful for identifying directly certified students on an individual basis. For instance when a student is admitted to your school at some time other than the first of the year. When you can locate a student using the lookup feature be sure to print the document of eligibility and file it either with your applications or in your direct certification file.

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20. Let’s go through the lookup process. In the Application Center, select Lookup, Direct Certification from the pull down menu.

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21. Next, select your search criteria. You can search by case number, student information, or guardian information.

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22. If you receive a response to your search, click on the “view” icon to display the results.

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23. This is the document you want to print and save with your applications or in your direct certification file.

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24. Shortly after the applications have been distributed, you will begin to receive applications for processing. First cross check with your direct certification list and disregard any applications for households that have already been directly certified. It is important to note that applications must be processed within 10 days of receipt, so it is critical to get organized and stay organized during this time. Applications from the prior year are valid for the first 30 operating days of the new school year (beginning with the first day of school). If a new application is not received within that time period, benefits must be terminated for any students after that 30 day grace period.

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25. If during the year you have a student withdraw, pull that application from your active file and after documenting the withdrawal date on the application, file it in a withdrawn file.

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26. Next we will be showing you how to complete Direct Verification. There is a difference between Direct Certification and Direct Verification. Direct Verification is only used during the verification process. Direct certification is used at the beginning of the year to directly certified students and can be used throughout the year to directly certified students. Direct Certification matches students based on food stamp and TANF information while Direct Verification matches students based on food stamp, TANF, and Medicaid information. [Next Slide](#)

27. To complete direct verification, select Lookup, Direct Verification from the pull down menu in the STN database. Unlike direct certification which matches against the most current Food Stamp and TANF data, Direct Verification searches back 180 days from the date of application, therefore, the date the parent/guardian signed the application is important.

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28. You can search by case number if you know it, student information, or guardian information. Enter your preference by selecting the radio button and entering the information. Then click on the Search button at the bottom right.

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29. If a match is found, click on the “view” icon to display the results.

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30. Once the results are displayed, click on the Print Information button and attach the printed copy to the original application. Complete the verification section on the back of the application and file the application in your verification file. There is no need to send a letter to the household informing them of the verification process.

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31. Verification instructions can be found on our website under Verification Information. Click on verification information then click on verification-how to.

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32. For the applications that cannot be directly verified, a letter must be sent to the household notifying them that their application has been selected for verification and instructing them to send proof of income. The verification notification letter can be found on our website under verification information. Click on verification, then click on We Must Check Your Application found under Verification--Meals

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33. When you receive verification of income, calculate the benefit based on all of the income. If the household benefits change from F-R or are terminated you must notify the household and change the benefit after 10 days of notification. If the household benefits change from R-F, you must notify the household in 3 days and change the benefit immediately. In the event that a household does not respond, follow up with a phone call. If the household still doesn't respond or is uncooperative, the free and reduced price benefits must be terminated.

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34. After verification is complete, you must notify the household if benefits stay the same, if they change, or if they are terminated. The letter notifying households of their benefit status after verification can be found on our website under Verification Information. Click on We Have Checked your Application under the heading Verification—Meals.

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35. Verification must be complete by November 15 and the verification summary report must be completed on the CNP Web by December 15. The verification summary report will not be available to complete until you have filed your October claim. The verification summary report can be found on the Claims/AFR tab on the CNP Web. **Next Slide**
36. Thank you for joining us for this WebEx on Direct Certification and Direct Verification for your school nutrition programs. We hope you found this training informative and helpful.