

PROCESS OVERVIEW

Purpose

When placing an order, a Recipient Agency (RA) must select a delivery period to identify the range of dates when the sales order should be delivered. Each delivery period is associated with an order due date that is set by FNS. To allow additional time for reviewing and consolidating orders, the State Distributing Agency (SDA) or Indian Tribal Organization (ITO) has the option to set additional lead time for each commodity group. RAs must place orders within the specified number of days prior to the date orders are due to FNS. The purpose of this transaction is for SDA/ITO Order Managers to select the delivery periods that will be available to the RAs and to set lead time for each commodity group.

Process Trigger

A commodity was added to the domestic catalog. An SDA/ITO Order Manager needs to select the delivery periods to be available to RAs for ordering and/or update the lead time for the commodity group.

Prerequisites

 An RA must exist as a suborganization to the SDA/ITO at the time delivery periods and lead time settings are updated.

Portal Path

Follow the Portal path below to complete this transaction:

Select Operations tab
 Order Processing tab
 Catalog Maintenance folder
 Maintain
 Direct-Ship Delivery Periods link to go to the Maintain Direct-Ship Delivery Periods initial
 screen.

Tips and Tricks

- The R/O/C acronyms in the fields tables represent Required, Optional, or Conditional field entries.
 - Required (R) a mandatory field necessary to complete the transaction
 - **Optional (O)** a non-mandatory field not required to complete the transaction
 - Conditional (C) a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Portal Navigation course for tips on creating favorites, performing searches, etc.



PROCEDURE

1. Start the transaction using the following Portal path: Operations tab → Order Processing tab → Catalog Maintenance folder → Maintain Direct-Ship Delivery Periods link.

Image: Maintain Direct-Ship Delivery Periods Screen

| Order Processing Complaint Admi | nistration Recall Administration | |
|------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| | Operations > Order Processing > Catalog Maintenance > Maintain Direct-Ship Delivery Periods | Full Screen Options * |
| File Uploads/Downloads Catalog Maintenance Display RA Catalog Maintain Direct-Ship Delivery P | Welcome to Maintain Direct-Ship Delivery Periods Please filter the Delivery Period results using the selection fields below. Dates are formated as MMDD/YYYY Search / Filter Delivery Periods | 8 |
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2. Click **I** (the **Hide Navigator** arrow button) to minimize the Portal menu. Note that this can be done on any transaction in WBSCM.

Welcome to Maintain Direct-Ship Delivery Periods

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3. As required, complete/review the following fields:

| Field | R/O/C | Description |
|---------------------|-------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Catalog Program | R | The program associated with the commodity. Example: CSFP |
| Commodity | R | A Commodity is a substance that is bought or sold on a commercial basis, or is used, consumed, or created in production. It is usually identified by a number identifying its master record. Example: 100127 |
| Product Description | 0 | Information used to characterize a material. |
| From Date | 0 | Beginning date. (Note) Users can enter a single date or a range of dates. Enter end date of range in the 1EA42E9629D548D187FD88222DE55 65B61DAE25139534354BB63324476A 7D0BC To field.1EA42E9629D548D187FD88222D E5565B61DAE25139534354BB633244 76A7D0BC |
| To Date | 0 | Ending date for specifying a delivery time period. (Note) Users can enter a single date or a range of dates. Enter end date of range in the 1EA42E9629D548D187FD88222DE55 65B61DAE25139534354BB63324476A 7D0BC To field.1EA42E9629D548D187FD88222D E5565B61DAE25139534354BB633244 76A7D0BC |
| Order by Date | 0 | Last date to submit orders for the corresponding Delivery Date. (Note) Users can enter a single date or a range of dates. Enter end date of range in the 1EA42E9629D548D187FD88222DE55 65B61DAE25139534354BB63324476A 7D0BC To |



| Field | R/O/C | Description |
|-------|-------|--------------------------------------------------------------------------------|
| | | field.1EA42E9629D548D187FD88222D E5565B61DAE25139534354BB633244 76A7D0BC |



(Note) Refer to the <u>Wildcard and Matchcode Searches Job Aid</u> for tips to search for or select values from a list.

Image: Maintain Direct-Ship Delivery Periods Screen

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4. Click Search / Filter (the Search / Filter button) to perform the search. All available delivery periods that match the selection criteria will display.



(Note) Delivery periods for a commodity are created by FNS; SDA/ITO Order Managers cannot create new delivery periods.



Image: Maintain Direct-Ship Delivery Periods Screen

| ations | > Order P | Processing > | Catalog Maintenance | > Maintain Di | rect-Ship Delh | ery Periods | | Full Screen |
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| | CSFP | 100127 | BEEF CAN-24/24 OZ | 06/18/2016 | 06/30/2018 | 06/01/2018 | | |
| | CSFP | 100127 | BEEF CAN-24/24 OZ | 07/01/2016 | 07/15/2010 | 06/01/2015 | | |
| | CSFP | 100127 | BEEF CAN-24/24 OZ | 07/16/2016 | 07/31/2018 | 06/01/2018 | | |
| | CSFP | 100127 | BEEF CAN-24/24 OZ | 08/01/2016 | 08/15/2016 | 06/01/2018 | | |
| | CSFP | 100127 | BEEF CAN-24/24 OZ | 08/18/2018 | 08/31/2016 | 06/01/2018 | | |
| | CSFP | 100127 | BEEF GAN-24/24 OZ | 09/01/2010 | 09/15/2010 | 00/01/2010 | | |
| | CSFP | 100127 | BEEF CAN-24/24 OZ | 09/16/2016 | 09/30/2016 | 06/01/2018 | | |
| | CSFP | 100127 | BEEF CAN-24/24 OZ | 10/01/2016 | 10/15/2018 | 07/28/2018 | | |
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| FP | FLOUR | | 0 | | | | | |
| | | | | | | | | |

5. In the *Commodity Delivery Periods by Program* section, perform one or more of the following:

| lf | Then |
|--------------------------------------------------------|------------------------------------------------------------------|
| The user wants to select all delivery periods | Click Select all (the Select all button) |
| The user wants to select specific delivery period(s) | Click \square (the checkbox icon) next to the line item |
| The user wants to deselect all delivery period(s) | Click De-Select all (the De-Select all button) |
| The user wants to unselect specific delivery period(s) | Click 🗹 (the checked box icon) next to the line item |

(Note) SDA/ITOs determines which delivery periods will be available to their suborganizations.



Image: Maintain Direct-Ship Delivery Periods Screen

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| - | CSFP | 100127 | BEEF CAN-24/24 OZ | 07/01/2016 | 07/15/2018 | 06/01/2018 | |
| 2 | CSFP | 100127 | BEEF CAN-24/24 OZ | 07/18/2018 | 07/31/2016 | 06/01/2018 | |
| ~ | CSFP | 100127 | BEEF CAN-24/24 OZ | 08/01/2016 | 08/15/2018 | 06/01/2018 | |
| 2 | CSFP | 100127 | BEEF GAN-24/24 OZ | 06/10/2010 | 08/31/2010 | 00/01/2010 | |
| 2 | CSFP | 100127 | BEEF CAN-24/24 OZ | 00/01/2016 | 09/15/2018 | 06/01/2018 | |
| - | CSFP | 100127 | BEEF CAN-24/24 OZ | 00/18/2016 | 00/30/2018 | 06/01/2018 | |
| 1 | CSFP | 100127 | BEEF CAN-24/24 OZ | 10/01/2016 | 10/15/2016 | 07/26/2015 | |
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| CSFP | DAIRY | | 0 | | | | |
| CSFP | FISH | | 0 | | | | |
| CSFP | FLOUR | | 0 | | | | |
| CSFP | FRUITS | 3 | 2 | | | | |
| | | | | | | | |

6. Click Submit Delivery Periods (the Submit Delivery Periods button) to apply the selected delivery periods to all assigned RAs.

(Note) When changes are applied, the message *Data was saved successfully*! displays at the top of the screen.

Image: Maintain Direct-Ship Delivery Periods Screen

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| SFP 100127 | BEEF CAN-24/24 OZ | 09/18/2016 | 09/30/2018 | 06/01/2018 | | |
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7. In the Maintain Lead Times section enter the number of Lead Time Days for the appropriate Commodity Group. In this example, a lead time of 5 days was entered for the FISH.

(Note) Lead time is entered as a number of days in advance of the date orders are due to FNS for a delivery period. This gives the SDA/ITO additional time to review and consolidate orders. For example, if orders are due to FNS on 10/1 and the SDA/ITO has set the **Lead Time Days** at 5, the RA must submit their order to SDA/ITO no later than 9/25.

Lead time is always set for the commodity group-not a specific commodity; for example, all "MEAT" would have the same lead time.

Image: Maintain Direct-Ship Delivery Periods Screen

| erations | > Order I | Processing > | Catalog Naintenance | Maintain Di | rect-Ship Dela | ery Periods | |
|---------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|----------------|-------------|---|
| Select | Program | Commodity | Product Description | From Date | To Date | Order Date | - |
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| 2 | CSFP | 100127 | BEEF CAN-24/24 OZ | 06/16/2016 | 06/30/2018 | 06/01/2018 | |
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| 1 | CSFP | 100127 | BEEF CAN-24/24 OZ | 07/10/2010 | 07/31/2010 | 00/01/2015 | |
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8. Click Submit Lead Time (the Submit Lead Time button) to apply the selected lead time to all assigned RAs .



(Note) When changes are applied, the message *Data was saved successfully*! displays at the top of the screen.

9. This transaction is complete.



RESULT

An SDA/ITO Order Manager selected delivery periods and entered lead time for all assigned RAs.



PROCESS OVERVIEW

Purpose

The purpose of this transaction is for a State Distributing Agency (SDA) Organization Administrator (Org Admin) to maintain entitlements for active Recipient Agencies (RAs) in WBSCM by downloading a template and then uploading an updated version of the entitlement data file. For an inactive RA, existing entitlements can be changed, but no new entitlements can be created.

Maintenance activities can be performed by:

- 1. Manually entering entitlement budget information for the current year.
- 2. Uploading an entitlement data file to WBSCM using a new data file or one that is created from a download of the previous year's entitlement.

The following programs require maintenance of RA entitlements:

- TEFAP The Emergency Food Assistance Program
- NSIP Nutrition Services Incentive Program
- NSLP National School Lunch Program
- SFSP Summer Food Service Program
- CACFP Child and Adult Care Food Program

Use the <u>RA Entitlement Budgeting by Program Job Aid</u> for a list of field definitions and portal paths for each of these programs.

Process Trigger

Perform this transaction when entitlements need to be updated in WBSCM. Entitlement programs are most often updated based on a yearly schedule. Program entitlements are based on different year calculations:

- Calendar year (CY) TEFAP
- Fiscal year (FY) NSIP, SFSP
- School year (SY) NSLP, CACFP

Prerequisites

• FNS must have previously assigned an entitlement budget to the SDA.

Portal Path

Follow the Portal path below to complete this transaction:

Select Operations tab
 Order Processing tab
 Entitlement Management folder
 SDA
 Entitlement Budgeting for (Program) link to go to the SDA Entitlement Budgeting for (Program)
 initial screen.

(Note) The link will include the name of the program: CACFP, NSIP, NSLP, SFSP, or TEFAP. Throughout this document, the NSLP path is used as an example.

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
 - Required (R) a mandatory field necessary to complete the transaction



- **Optional (O)** a non-mandatory field not required to complete the transaction
- Conditional (C) a field that may be required if certain conditions are met, typically linked to completion of a mandatory field.
- Refer to the WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigation training and tips on creating favorites, performing searches, etc.



PROCEDURE

- 1. Start the transaction using the following Portal path: **Operations** tab **→ Order Processing** tab **→ Entitlement Management** folder.
- 2. Perform one of the following:

| lf | Then |
|-------------------------------------------------|---------------------------------------------|
| The user needs to upload CACFP entitlement data | Select SDA Entitlement Budgeting for CACFP. |
| The user needs to upload NSIP entitlement data | Select SDA Entitlement Budgeting for NSIP. |
| The user needs to upload NSLP entitlement data | Select SDA Entitlement Budgeting for NSLP. |
| The user needs to upload SFSP entitlement data | Select SDA Entitlement Budgeting for SFSP. |
| The user needs to upload TEFAP entitlement data | Select SDA Entitlement Budgeting for TEFAP. |



(Note) This work instruction uses NSLP as an example; however, the steps provided apply to all programs. Use the <u>RA Entitlement Budgeting by Program</u> job aid for a list of field definitions and portal paths for each of these programs.

Image: SDA Entitlement Budgeting for NSLP Screen

| 4 5 | Operations I>. Order Processing I>. Entitlen | ent Management 🗧 SDA Entitlement Bud | geting for NSLP | Full Screen Options |
|-----------------------------------------------------------------------------------|----------------------------------------------|--------------------------------------|-------------------------------|---------------------|
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| SDA Entitement Budgeting for CACFP | General Variables | | | |
| SDA Entitiement Budgeting for NSIP | Variable** | Current Selection | Description | |
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| SDA Entitionent Budgeting for TEFAP Shipment Receipts WV Delivery Calendar | | | | |
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| SDA Entitionen: Budgeting for TEFAP Shipment Receipts NW Delivery Calendar | | | | |
| SDA Entitiewent Budgeting for TEFAP Bripment Receipts NW/ Delivery Calendar | | | | |

3. Click **•** (the **Hide Navigator** arrow) to minimize the navigation menu as necessary. Note that this can be done in any screen in WBSCM.



Image: SDA Entitlement Budgeting for NSLP Screen

| rations > Order Processing > Entitlement Management. > SDA Entitlement Budgeling for NSLP Variable Entry Available Variants: Save As. Delate Snow Variable Personalization General Variables Variable* Current Selection Description | dons > Order Processing > Entitlement Management > SCA Erittlement Budgeling for NSLP Pull Screen Opc ariable Entry Available Variants: Save As Ordereral Variables Show Variable Personalization Variables: Current Selection Variables: Current Selection Variables: Current Selection OK Check | rovessing | | |
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| Available Variable Variable Variable Variable Variable Personalization General Variable* Variable* Current Selection Description | Available Variants: Save Save As Delete Show Variable Personalization Oeneral Variable** Current Selection Program year CK: Creox | ons > Order Processing > Entitlement | Management > SDA Entitlement Budgeting for NSL | Full Screen Op |
| Available Variable Va | Avelable Variants: Save As. Delete Snow Variable Personalization General Variable** Current Selection Description Program year OK Check | | | |
| Available Variants: Save Save As. Delete Show Variable Personalization General Variable* Variable* Variable* Current Selection Program year | Available Variants: Save As, Delote Show Variable Personalization General Variables Variable* Current Selection Description Program year OK Check | riable Entry | | |
| Available Variants: Save Save As Delete Show Variable Personalization General Variable* Variable** Current Selection Program year | Available Variable Variable Personalization General Variable** Current Selection Program year Image: Check | | | |
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| General Variables Variable** Current Selection Program year T | Variable** Current Sciencion Program year ID | Available Vanants: Save | Save As Delete | Show Variable Personalization |
| Variable** Current Selection Description | Variable** Current Selection Description Program year' OK Check | General Variables | | |
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4. As required, complete/review the following fields:

| Field | R/O/C | Description |
|--------------|-------|------------------------------------------------------------------------------------------------------------------------|
| Program year | R | Year when the customer will be able to use the funds allocated for the specific program. Example: 2020 |



(Note) The program year may be a fiscal year, school year, or calendar year, depending on the program.

- 5. Click Check (the Check button) to determine if the value entered in the Program Year field is valid. WBSCM defines the year as a four-digit number between 0 and 9999. An error is displayed if a value is entered outside of the expected range.
- 6. Click OK (the OK button) to view the entitlement budgeting.



Image: SDA Entitlement Budgeting for NSLP Screen

| | der Früdessing | > Entitlement | Management > 3 | SDA Entitiement Bu | idgeting for NSLP | | | | | Full St | reen Opti |
|-----------------------|-----------------------|------------------|---------------------|-----------------------------------|-------------------|--------------------|---------------------------------------|-------------------------------|-------------------------------------------|--------------|-----------------------|
| ISLP Entiden | nent Budget for I | RA. | | | | | | | | | |
| Refresh F | e-Calculate S | ave Undo | Upload Downlo | ad Maintain N | ew Record | | | | | | |
| | | | | | Meal Rate** | FNS Meal Rate Ad | in- | | | | |
| BP SOA ** | Entitlement Pr | ogram** | | Program yea | K ± 3 | | 3 | | | | |
| TX Dept. of | NSLP NATIO | NAL SCHOO | L LUNCH PROGR | AM 2020 | 0.2755 | 0.00 | 000 | | | | |
| | Meal Counts Actual | 60% of Kosher | Meal Estimated t | Total Meal Count ^{6*} | Meal S Value®** | Entitement Adj. ** | Enttlement _{av} Sub-Total | Cash/CLOC Pre-Yr Actual ** | Cash/CLOC meals Avg. Count for SDA Adj | Meal Count** | Previous Carry-Ove |
| BP SDA! | E | A EA | E) | A EA | S | s | s | s | EA | EA | |
| TX Dept. of | (b)(4) | | | | | | | | | | |
| | | Meal Cour | nt Initial Allocate | d Ent. Amt. Adju | stment between R4 | s DOD Fresh Fin | al Commodity En | titlement | | | |
| | | | EA | | | s s | | | | | |
| Entitlement | to SDA by FNS | | | | | | | | | | |
| Entitiement | to RA by SDA | |) (4 | | | | | | | | |
| SDA Entitie | ment Unallocate | d | / \ ' | | | | | | | | |
| | | 1/lea | Count## Ent Ar | nt Distributed per N | Veal Count** Ad | ustment between RA | s#= DOD Fresh | Final Commo | odity Entitlement** | | |
| Business Pa | ither a | | EA | | \$ | | \$ | \$ | | | |
| and the second second | | | | | | | | × | | | |
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7. Perform one of the following:

| lf | Then |
|-------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| The user needs to return to the search screen | Click Refresh button). |
| The user needs to include any RAs that may not be displayed | Click New Record (the New Record button) to display newly entered RAs. |
| The user needs to enter entitlements manually | Go to Step 8. |
| The user needs to create a new upload file by using previous year entitlements | Go to Step 12. |
| The user needs to upload the entitlement for one or more RAs for the current year by uploading a file | Go to Step 22. |

Image: SDA Entitlement Budgeting for NSLP Screen

| | rder Proce | essing > | Enttlement | Managemer | nt > SD. | A Entitiement Bu | idgeting for NSLP | | | | | | | ull Ser | reen Opti |
|-------------------------------------------------------------------------|-----------------------------------------|-----------------------------------|-------------------------------|----------------------------------|--------------------------------------|--------------------------------------|--------------------------------------------------|-----------------------------------------------|-----------------------------------|-------------------------------|----------------------------------|------------------------------------------|---------|---------|---------------------|
| ISLP Entitien | nent Bud | get for RA | | | _ | | | | | | | | | | |
| Refesh R | Re-Calcul | ate Sav | e Undo | Upload | Download | Maintain N | lew Record | | 1000 | | | | | | |
| | | | | | | - | Meal Rate#* | FNS Meal Rate A | dfare. | | | | | | |
| BP SDATE | Entitier | ment Prog | ram | 15 | | Program yea | 7.± 3 | | 5 | | | | | | |
| TX Dept. of | NSLP | NATION | AL SCHOOL | LUNCH P | RUGHAN | 1 2020 | 0.2755 | 0.0 | 000 | | | | | | |
| | Meal C Actual | Counts | 60% of es Kosher | Meal Estin | nated _{til} | Total Meal Count ^{##} | Meal \$ Value#* | Entitlement Adj.** | Entt Sub- | lement _{és} Total | Cash/CLOC Pre-Yr Actual | CashiCLOC meals Avg.Count for SDA Avg | Maal Co | int#* | Previous Carry-O |
| BP SDA## | | EA | EA | | EA | EA | \$ | 5 | | 5 | S | | EA | EA | |
| | | | | | | | | | | | | | | | |
| TX Dept. of | (b) | (4) | | | 11 | | | | | | | | | | |
| TX Dept. of | (<mark>b)</mark> | (4) | Meal Cour | t Initial A | llocated i | Ent. Amt. Adju | stment between RJ | as DOD Fresh F | inal Co | ammodity En | titlement | | | | |
| TX Dept. of | (b) (| (4) | Meal Cour | t Initial A | Hocated I | Ent. Amt. Adju | stment between R | ls DODFresh F S S | inal Co | ommodity Er | tilement | | | | |
| TX Dept. of Entitlement | (b) (| (4) by FNS | Meal Court | t Initial A | Hocated i | Ent. Amt. Adju | stmant between RJ | As DOD Fresh F S S | inal Co | immadity En | tilement | | | | |
| TX Dept. of Entitlement Entitlement | to SDA b | (4) by FNS SDA | Meal Cour E | t Initial A | Recated i | Ent. Amt Adju | stment between RJ | As DOD Fresh F S S | inal Co | ammedity En | tillement | | | | |
| TX Dept. of Entitlement Entitlement SDA Entitle | to SDA b to RA by | y FNS SDA allocated | Meal Court E | t Initial A GA | Horatad B | Ent. Amt Adju: | stment between R | As DOD-Fresh F S S | inal-Co | immodity Er | tillement | | | | |
| TX Dept. of Entitlement Entitlement SDA Entitle | to SDA b to RA by ement Un | (4) by FNS SDA allocated | Meal Court E | t Initial A | Rocatad R | Ent. Amt. Adju | stmant between RJ | is DOD Fresh F S S S | inal Co | DOD Fresh | Eisel Comm | div Entifementii | | | |
| TX Dept. of Entitlement SDA Entitle Business Pa | to SDA b to RA by sment Un | (4) SDA allocated | Meal Cour E () Mea | t Initial A | Rocated I | Ent. Amt Adjus Distributed per N | stmant between RJ Jeel Count ^{es} Ad | la DOD Fresh F § § Justment between R | inal Co Asti | ommedity En | Final Commo | dity Entidement** | | | |
| TX Dept. of Entitlement SDA Entitle Business Pa | to SDA b to RA by ement Un | (4) by FNS SDA allocated | Meal Court E | t Initial A | Hocatad B | Ent. Amt. Adjus Distributed per N | stmant between Ru Jeal Count** Ad \$ | las DOD Fresh F S S Justment between R. | inal Co As#= \$ | ommadity Er DOD Fresh | titlement Final Commo S | dity Entitement* | | | |
| TX Dept. of Entitlement Entitlement SDA Entitle Business Ps | (b) to SDA b to RA by ement Un | (4) by FNS SDA allocated | Meal Court E (D) Mea | t Initial A | Hocatad B | Ent. Amt. Adju | stment between Ri Ieal Count® Ad | As DOD Fresh F S S Justment between R | inal Co As ^{#1} \$ | ommodity En | tilamant Final Commo \$ | dty Entidement ^{er} | | | |
| TX Dept. of Entitlement Entitlement SDA Entitle Business Pa | (b) to SDA b to RA by ement Un | (4) SDA allocated | Meal Cour E (b) Mea | t Initial A A Count® EA | ilocatad i Contraction EntAnti | Ent. Amt. Adju | stmant betwaan Ri Jiesi Count** Ad \$ | ks DOD Fresh F S S Justment between R | inal Co As ⁴¹ S | DOD Fresh | titlement ** Final Commo S | dity Entitiement ^{es} | | | |



8. Click Maintain (the Maintain button) to enable edit mode to enter entitlement details.

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(Note) Use New Record (the New Record button) to add an entry for every active RA who has the program assigned (from Organization Maintenance) and does not already have an existing entry (for the given program / year).

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(Note) The Maintain (the Maintain button) allows users to modify existing entries for both active and inactive RAs.

Image: SDA Entitlement Budgeting for NSLP Screen

| SI R Entidam | ant Burdnat for Bu | 2 | | | | | | | | | |
|---------------|---------------------------|--------------------------------|-------------------------------|-----------------------------------|------------------|---------------------|----------------------------------------|-------------------------------|------------------------------------------|----------------|----------------------|
| Refeat Re | e-Calculate Sa | ve Undo | Upload Download | Maintain Ne | ew Record | | | | | | |
| | | | | | Meal Rate** | FNS Meal Rate Ad | per l | | | | |
| BP SOA** | Entitlement Prog | gram ^{e =} | | Program year | 4 S | | S | | | | |
| TX Dept. of | NSLP NATION | AL SCHOOL | LUNCH PROGRAM | 2020 | 0.2755 | 0.00 | 00 | | | | |
| | Meal Counts Art Actual | 60% of _{as} Kasher | Meal Estimated () Increase | Total Meal Count ^{ex} | Meal 3 Value** | Entitlement Adj. ** | Entitlement _{er} Sub-Total | Cash/CLOC Pre-Yr Actual ** | Cash/CLOC meals Avg.Count for SDA Adj | , Meal Count** | Previous Carry-Ov |
| BP SDA** | EA | EA | EA | EA | 3 | 3 | 3 | 5 | EA | A EA | |
| TX Dept. of | (b) (4) | | | | | | | | | | |
| | | Meal Court | Initial Allocated B | Int. Amt. Adjus | tment between RA | a DOD Fresh Fir | nal Commodity En | titlement | | | |
| | | E | A | | | s s | | | | | |
| Entitlement t | o SDA by FNS | (b) | (Λ) | | | | | | | | |
| Entitiement t | o RA by SDA | | (4) | | | | | | | | |
| SDA Entitler | ment Unallocated | ` | | | | | | | | | |
| | | Meal | Counter EntAnti | Distributed per M | lesi Countes Adj | ustment between RA | see DOD Fresh | * Final Commo | odity Entitlement ^{au} | | |
| | trer 4 | | EA | | \$ | | \$ | \$ | | | |
| Business Par | | | | | | | | | | | |
| Business Par | | | | | | | | | | | |

9. As required, complete/review the following fields:

| Field | R/O/C | Description |
|---------------------------|-------|--------------------------------------------------------------------------------------------------------------------------------------|
| Meal Count | R | The number of meals expected to be consumed during the entitlement budget period. |
| | | Example: 5500,000 |
| | | (Note) Meal Counts to RAs by SDA cannot exceed amount allocated to SDA by FNS. |
| Adjustment between RAs | 0 | Adjustment amount for all RAs assigned by an SDA . |
| | | Example: 0.00 |
| | | (Note) This amount is the amount moved from one RA to another. The amount cannot exceed the amount allocated to SDA by FNS. |



| Field | R/O/C | Description |
|-----------|-------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| DOD Fresh | 0 | The amount of the entitlement that has been allocated to spend on the USDA DoD Fresh program. |
| | | Example: 2250 <u>.</u> 00 |
| | | (Note) This amount is subtracted from the total available entitlement to be used in WBSCM. DOD Fresh is an editable field for NSLP only. |
| | | (Note) USDA DoD Fresh is a program operated in partnership with the Defense Logistics Agency within the Department of Defense that allows schools to purchase fresh fruits and vegetables using entitlement funds. |



(Note) Each line represents an RA. The fields listed above should be populated for every RA receiving entitlement funds for the current year.

Image: SDA Entitlement Budgeting for NSLP Screen

| | ier Processing | Enttlement | Management > 1 | SDA Entitlement B | ludgeting for NSLP | | | | | Full S | preen Op |
|----------------------|-----------------------|--------------------------------|---------------------|-------------------------------------|--------------------|----------------------|--------------------------|----------------------------|-----------------------------------------|--------------|--------------------|
| SLP Entitem | ent Budget for R | A | Linked Downle | ad Maintain | New Report | | | | | | |
| in the second second | | | oproud Domini | | Meal Rate* | FNS Meal Rate A | cj n = i | | | | |
| BP SOA #* | Entitlement Pro | gramer | | Program ye | ar 🔬 🔰 👌 | 5 | 3 | | | | |
| TX Dept. of | NSLP NATIO | NAL SCHOOL | LUNCH PROGR | AM 2020 | 0.2755 | 0.0 | 000 | | | | |
| | Meal Counts Actual | 00% of _p Kosher | Meal Estimated | * Total Meal Count ^{#*} | Meal \$ Value** | Entitlement Adj.#* | Entitlement Sub-Total | Cash/OLOC Pre-Yr Actual | Cash/CLOC meals Avg.Count for SDA Ad | Meal Count** | Previou Carry-C |
| BP SDA#* | EA | EA | E | A EA | . 3 | 3 | | 3 3 | EA | EA | 3 |
| TX Dept. of | (b) (4) | | | | | | | | | | |
| | | Meal Court | it Initial Allocate | e Ent. Amt. Adj | ustment between R | As DOD Fresh Fi | inal Commodity | Entitiement | | | |
| | | E | A | | | 5 5 | | | | | |
| Enstementt | o SDA by FNS | | | | | | | | | | |
| Entitlementt | o RA by SDA | |) (4 | | | | | | | | |
| SDA Entitier | ment Unallocated | | | / | | | | | | | |
| | | Meal | Count®: Ent A | nt Distributed per | Meal Count** Ac | ijustment between RJ | As# DOD Fr | sch ** Final Comm | odity Entitlement## | | |
| Business Par | rtner # | | EA | | s | | S | s | | | |
| | | | | | | | | | | | |
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10. Click Re-Calculate (the Re-Calculate button) to update the tentative entitlement budget based on the changes made. Re-Calculate updates the Ent Amt Distributed per Meal Count and Final Commodity Entitlement columns. In addition, the totals on the yellow highlighted Result line are re-calculated based on the changes made. Scroll down to view the totals line if it is not visible.

Ð

(Note) Depending on the number of **Business Partners listed**, it may be necessary to navigate to the last page of records to view the totals.

(Note) The **Re-Calculate** button does not save changes; it shows the results of changing



11. Perform one of the following:

| lf | Then |
|---------------------------------------------------------------------|-------------------------------|
| The user needs to reverse changes made during re-calculation | Click Undo (the Undo button). |
| The user needs to save changes made using the re-calculation option | Click Save (the Save button). |
| The user is finished maintaining entitlements | Go to Step 31. |

Image: SDA Entitlement Budgeting for NSLP Screen

| ISLP Entitiem | ent Budget for RA | | Linkered Developer | Maintain M | au Dannel | | | | | | |
|---------------------------------------------------------------|---------------------------------------------------|---------------------|----------------------------------------|-----------------------------------|------------------------------|-------------------|----------------------------------------|----------------------------|---------------------------------------------------------|--------------|-------------------------|
| Neresti Pi | e-patorate oar | | opicad Download | | Meal Rate** | FNS Meal Rate Ad | 9.2×1 | | | | |
| BP SDA # | Entitlement Prog | ram#= | | Program yea | ra S | | \$ | | | | |
| TX Dept. of | NSLP NATION | AL SCHOOL | LUNCH PROGRAM | 2020 | 0.2765 | 0.0 | 000 | | | | |
| | Meal Counts av Actual | 80% of et Kosher | Meal Estimated ev Increase | Total Meal Count ^{##} | Meal S Value#* | Entitlement Adj 💷 | Entitlement _{es} Sub-Total | Cash/CLOC Pre-Yr Actual | Cash/CLOC meals Avg.Count for SDA Adj ^{err} | Meal Count®® | Previous ' Carry-Ove |
| BP SDA#* | EA | EA. | EA | EA | s | s | s | \$ | EA | EĄ | |
| | | THEFT COULT | Interat Millocateo | Ent. Amt. Adjus | sument between RA | As DOD Fresh Fil | nal Commonity En | operners. | | | |
| Entitlement t Entitlement f SDA Entitler | to SDA by FNS to RA by SDA ment Unallocated | | | Eni, Amit Adjus | soment between K- | s DUD Fresh Fi | nai Commodity En | opener. | | | |
| Entitlement t Entitlement t SDA Entitler Business Pa | to SDA by FNS to RA by SDA ment Unallocated | (b) Meal | ICount ^{®®} Ent Ant | Distributed per l | Mesi Count ^{ar} Adj | s DUD Fresh Fi | is ^{ar} DOD Fresh | ** Final Commo | odiy Entitlement ^{ere} | | |

12. Click Download (the Download button) to go to the *BI-Integrated Planning: File Download* screen.



Image: BI-Integrated Planning: File Download Screen

| SAP | BI-Integrated Planning: File Download |
|---------------------------|-----------------------------------------------------------------------------------------------|
| Data Selection | |
| Enter the selection crite | for your download. This selection will be locked temporarily until the download is completed. |
| • Program year. • | |
| Format Selection | |
| File Format: Text (Tab | limited) 🗸 |
| Download Next | |
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13. As required, complete/review the following fields:

| Field | R/O/C | Description |
|----------------|-------|------------------------------------------------------------------------------------------|
| * Program Year | R | Year when the customer will be able to use the funds allocated for the specific program. |
| | | Example: 2019 |
| | | (Note) In this example, the year 2019 was used to update year 2020. |

14. If necessary, click (the **drop-down** arrow for **File Format** field) and select the appropriate option. In this example, the defaulted **Text (Tab delimited)** option is kept.



(Note) The File format options are:

- Text (Tab delimited)
- Text (Fixed length)
 - Text (CSV)
- XML



Image: BI-Integrated Planning: File Download Screen

| SAP | Bi-Integrated Planning: File Download | |
|------------------------------------|--------------------------------------------------------------------------------------|--|
| Data Selection | | |
| Enter the selection criteria for y | download. This selection will be locked temporarily until the download is completed. | |
| Format Selection | | |
| File Format: Text (Tab delimite | v | |
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- **15.** Click Download button) to download the entitlement budget data.
- **16.** Review the messages at the top of the screen. If error messages appear, the download did not occur. Review the error message for recommended actions before trying again. Contact the WBSCM Service Desk with any questions.

Image: Bi-Integrated Planning: File Download Screen

| | | | | | | 0 |
|-------------------------------|-----------------------|-------------------------------|---------------------|---------------------------------|---------------------|-----|
| AP. | | BI-Integrated | Planning: File Down | All 🕑 3 | 0 | e x |
| | | | | USDA: ENT DOWNLOAD N | SLP SDA executed | > |
| ormat Selection | | | | (2) 15 records read, 0 generate | d. 0 changed. 0 del | |
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| e Format: Text (Tab delimited |) Open File Save File | ļ | | O FIL_SDOWN CACF EXECUTE | a winiour erfors | |
| ile Preview | | | | | | |
| ew; [Standard View] | V Print Version Exp | port V | | | | (1) |
| Entitlement Program | Program year | Business Partner | Ent Meal count | Entitlement between | DoD- Fresh | |
| NSLP | 2019 | 4001181 | (h) (1) | 0.00 | 0.00 | |
| NSLP | 2019 | 4001987 | (D)(4) | 0.00 | 0.00 | |
| NSLP | 2019 | 4001994 | | 0.00 | 500.00 | |
| NSLP | 2019 | 4002423 | | 0.00 | 0.00 | |
| NSLP | 2019 | 4003287 | | 0.00 | 943.56 | |
| NSLP | 2019 | 4003684 | | 0.00 | 0.00 | |
| NSLP | 2019 | 4003944 | | 0.00 | 0.00 | |
| NSLP | 2019 | 4004092 | | 0.00 | 0.00 | |
| NSLP | 2019 | 4004105 | | 0.00 | 0.00 | |
| NSLP | 2019 | 4004630 | | 0.00 | 0.00 | |
| | | | | 0.00 | 0.00 | |
| NSLP | 2019 | 4005487 | | 0.00 | | |
| NSLP NSLP | 2019 2019 | 4005487 4005942 | | 0.00 | 0.00 | |
| NSLP NSLP NSLP | 2019 2019 2019 | 4005487 4005942 4009361 | | 0.00 | 0.00 0.00 | |



17. Click Save File (the Save File button).

D

(Note) In the *File Preview* section of the screen (Export) (the **Export** button) can be used to download entitlement data in a spreadsheet compatible version. This version cannot be uploaded.

18. Open the downloaded file in Excel.

Image: Microsoft Excel Screen

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| 2 | NSLP | 2019 | 4001181 | (b) (| | 0 | | | | | | | _ |
| 3 | NSLP | 2019 | 4001987 | | 0 | 0 | | | | | | | |
| 4 | NSLP | 2019 | 4001994 | | 0 | 500 | | | | | | | |
| 5 | NSLP | 2019 | 4002423 | | 0 | 042.56 | | | | | | | |
| 7 | NSLP | 2019 | 4003287 | | 0 | 945.30 | | | | | | | |
| 8 | NSLP | 2019 | 4003044 | | 0 | 0 | | | | | | | |
| 9 | NSLP | 2019 | 4004092 | | 0 | 0 | | | | | | | |
| 10 | NSLP | 2019 | 4004105 | - | 0 | 0 | | | | | | | |
| 11 | NSLP | 2019 | 4004630 | | 0 | 0 | | | | | | | |
| 12 | NSLP | 2019 | 4005487 | | o | σ | | | | | | | |
| 13 | NSLP | 2019 | 4005942 | | 0 | 0 | | | | | | | |
| 14 | NSLP | 2019 | 4009361 | | 0 | 0 | | | | | | | |
| 15 | NSLP | 2019 | 4009362 | | 0 | 0 | | | | | | | |
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19. As required, complete/review the following fields:

| Field | R/O/C | Description |
|---------------------|-------|------------------------------------------------------------------------------------------|
| Entitlement Program | R | The acronym for the entitlement program. |
| | | Example: NSLP |
| Program Year | R | Year when the customer will be able to use the funds allocated for the specific program. |
| | | Example: 2020 |



| Field | R/O/C | Description |
|---------------------|-------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Business Partner | 0 | Number or Name assigned to State Distribution Agencies (SDAs), Indian Tribal Organizations (ITOs), Co-ops, and Recipient Agencies (RAs) in WBSCM. |
| | | Example: 4001181 |
| | | (Note) In this example, the Business Partner is displayed as a number and applies only to the RA. |
| Ent Meal count | 0 | The number of meals expected to be consumed during the entitlement budget period. |
| | | Example: 42,000.00 |
| Entitlement Between | 0 | The total amount of entitlement dollars assigned to RAs by an SDA. |
| | | Example: 0 |
| | | (Note) This amount is the amount moved from one RA to another. The amount cannot exceed the amount allocated to SDA by FNS. |
| DOD Fresh | 0 | The amount of the entitlement that has been allocated to spend on the USDA DoD Fresh program. |
| | | Example: 0 |
| | | (Note) DOD Fresh is used for NSLP, SFSP, and CACFP. Entitlement allocation for SFSP and CACFP is performed via file upload. |
| | | (Note) USDA DoD Fresh is a program operated in partnership with the Defense Logistics Agency within the Department of Defense that allows schools to purchase fresh fruits and vegetables using entitlement funds. |

(Note) Update the document to reflect selected year funding for each RA.



Image: Microsoft Excel Screen

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|---------|----------------------------|-----------------------|------------------|--------------------------------|--------------------------------|---------------------|-------------------------------------------|-----------------------|-----------------------|-------------------------|--------------|-------------|------|
| F | le <mark>Home</mark> Inser | t Page Lay | out Formulas | Data Re | view View | Help | | | | | Commen | its 🖻 Sha | are |
| Ľ Pa | Calibri | ~ 11 ⊻ ~ ⊞ ~ : | | = = ₽ = = = • | General \$ - % 5 €08 -30 | ✓ Co ✓ Co ✓ Co ✓ Co | nditional I rmat as Tal II Styles ~ | Formatting ~ ble ~ | E Inse Dele For | ert × ete ~ mat × | Σ * 27 * | Sensitivity | |
| CI | pboard Fa | Font | r <u>s</u> A | lignment 🗔 | Number | 5 | Style | 5 | Ce | lls | Editing | Sensitivity | ~ |
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| 1 | Entitlement Program | Program year | Business Partner | Ent Meal coun | t Entitleme D | oD- Fresh | | | | | | | |
| 2 | NSLP | 2020 | 4001181 | (h) | 0 | 0 | | | | | | | |
| 3 | NSLP | 2020 | 4001987 | | 0 | 0 | | | | | | | |
| 4 | NSLP | 2020 | 4001994 | | 0 | 500 | | | | | | | |
| 5 | NSLP | 2020 | 4002423 | | 0 | 0 | | | | | | | |
| 6 | NSLP | 2020 | 4003287 | | O | 0 | | | | | | | |
| 7 | NSLP | 2020 | 4003684 | | 0 | 0 | | | | | | | |
| 8 | NSLP | 2020 | 4003944 | | 0 | 0 | | | | | | | _ |
| 9 | NSLP | 2020 | 4004092 | | 0 | 0 | | | | | | | |
| 10 | NSLP | 2020 | 4004105 | | 0 | 0 | | | | | _ | | _ |
| 11 | NSLP | 2020 | 4004630 | | 0 | 0 | | | | | | | |
| 12 | NSLP | 2020 | 4005487 | | 0 | 0 | | | | | | | |
| 13 | NSLP | 2020 | 4005942 | | 0 | 0 | | | | | | | |
| 14 | NSLP | 2020 | 4009361 | | 0 | 0 | | | | | _ | | _ |
| 15 | NSLP | 2020 | 4009362 | | 0 | 0 | | | | | | | |
| 10 | | | | | | | | | | | | | |
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| Rea | dy 🗊 | | | | | | | | III (| 1 E |] | + | 100% |

20. Click 🔲 (the Save icon) to save the file locally once all data has been entered.



(Note) In this example, the 2019 data was updated for use in 2020. The user updated the **Program year**, **Ent Meal count** and **DOD Fresh** columns.

21. Click (the **Close** button) to close the data file and return to the *NSLP Entitlement Budget for RA* screen.



(Note) If necessary, close the BI-IP Integrated Planning: File Download screen.



Image: SDA Entitlement Budgeting for NSLP Screen

| | -oacoate oa | ve Undo | Upload | Download | Maintain N | ew Record | | | | | | |
|----------------|--------------------------|-------------------------------|-----------------------|-------------|-----------------------------------|------------------------------|--------------------|----------------------------------------|----------------------------|------------------------------------------|--------------------------|----------------------|
| | | | | | | Meal Rate** | FNS Meal Rate A | dian | | | | |
| BP SDA # | Entitlement Pro | gram** | | | Program year | <u>د</u> \$ | | s | | | | |
| TX Dept. of | NSLP NATIO | NAL SCHOO | L LUNCH P | ROGRAM | 2020 | 0.2755 | 0.0 | 000 | | | | |
| | Meal Counts en Actual | 60% of _m Kosher | Meal Esti Increase | mated | Total Neal Count ^{®®} | Meal S Value** | Entitlement Adj.#* | Entitlement _{es} Sub-Total | Cash/GLOC Pre-Yr Actual | Cash/CLOC meals Avg.Count for SDA Adj | Meal Count ^{ex} | Previous Carry-Dy |
| BP SDA** | EA | EA | | EA | EA | 3 | 3 | 1 | 3 3 | EA | EA | |
| TX Dept. of | (b) (4) | | | | | | | | | | | |
| - | | Meal Cour | nt Initial / | Allocated E | int. Amt. Adju: | tment between RA | s DOD Fresh F | inal Commodity | Entitement | | | 50 - 63 |
| | | 1 | EA | | | | S 9 | | | | | |
| Entitlement to | SDA by FNS | | \ / | | | | | | | | | |
| Enstlement to | RAbySDA | | | 4 | | | | | | | | |
| SDA Entitiem | nent Unallocated | | | . • / | | | | | | | | |
| | | Mea | d Count#* | Ent Ant S | Distributed per M | leal Count ^{er} Adj | ustment between R/ | As# DOD Fre | sh** Final Comm | odity Entitlement#** | | |
| | | | | | | | | | | | | |

22. Click Upload (the Upload button) to upload RA Entitlements from a data file.

(Note) This file may be created as a new file or by downloading a previous year's entitlement and updating the information (Steps 12-21).



(Note) The upload files must reflect the following:

- Each entry must have a BP ID, program, year
- RA must be under the SDA
- RA must have the instance program assigned (via Organization Maintenance)

Data information, including data structures, elements, and definitions, as well as sample files for uploading entitlements are available from FNS.



(Note) When uploading entitlements from a file, WBSCM creates new row entries if nothing exists in the **Program Year** for an RA. If the file upload is a change to an existing entry for the **Program Year**, the existing entry is updated to reflect the changes from the file.

(Note) Existing entitlements can be changed for an inactive RA, but no new entitlements can be created.



Image: BI-Integrated Planning: File Upload Screen

| File Selecti | on | |
|------------------|-------------------------------------|----------|
| inter the file r | ame or "browse" to select the file. | |
| ile Name: N | o file chosen | <u>↑</u> |
| 0.0 | | |
| | | |
| | | |
| | | |

- 23. Click 1 (the Browse button) to locate the data file with the current year entitlement.
- 24. Locate and select the appropriate file to be uploaded. In this example, the file named SAP_BEX_FILE_DO.....txt is selected.

Image: BI-Integrated Planning: File Upload Screen

| | | Ø1 |
|--------------------|-------------------------------------|----------|
| SAP | BI-Integrated Planning: File Upload | |
| File Selection | | - |
| Enter the file nam | e or "browse" to select the file. | |
| File Name: SAP | BEX_FILE_DOtxt | <u>1</u> |
| Upload Save | Undo | |
| uptoad Save | | |
| | | |
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Upload 25. Click (the Upload button).



(Note) The user located and selected the appropriate file to upload.

26. Review the upload details.

(Note) Review the messages at the top of this screen. If error messages appear, the upload did not occur. Correct the issue and return to Step 22 to attempt the upload again.

Image: BI-Integrated Planning: File Upload Screen

| i۸ | 7 | | BI-Integrated | Planning: File Down | All 🥑 3 | ti ti | × |
|------|---------------------|----------------------|------------------|---------------------|------------------------------|----------------------|---|
| | | | | | USDA: ENT DOWNLOAD N | SLP SDA executed | > |
| File | Preview | | | | ③ 15 records read, 0 generat | ed,11 changed, 0 del | |
| View | [Standard View] 🗸 🗸 | Print Version Export | ~ | | ② FIL_SDOWN CACF execution | ed without errors | > |
| | Entitlement Program | Program year | Business Partner | Ent Meal count | Entitlement between | DoD- Fresh | |
| | NSLP | 2020 | 4001181 | (h) (1) | 0.00 | 0.00 | |
| | NSLP | 2020 | 4001987 | (D) (4) | 0.00 | 0.00 | |
| | NSLP | 2020 | 4001994 | | 0.00 | 500.00 | |
| | NSLP | 2020 | 4002423 | | 0.00 | 0.00 | |
| | NSLP | 2020 | 4003287 | | 0.00 | 943,56 | |
| | NSLP | 2020 | 4003684 | | 0.00 | 0.00 | |
| | NSLP | 2020 | 4003944 | | 0.00 | 0.00 | |
| | NSLP | 2020 | 4004092 | | 0.00 | 0.00 | |
| | NSLP | 2020 | 4004105 | | 0.00 | 0.00 | |
| | NSLP | 2020 | 4004630 | | 0.00 | 0.00 | |
| | NSLP | 2020 | 4005487 | | 0.00 | 0.00 | |
| | NSLP | 2020 | 4005942 | | 0.00 | 0.00 | |

Save 27. Click (the Save button).



Image: BI-Integrated Planning: File Upload Screen

| SAP n | All ⊘ 3 | x |
|--------------|---------------------------------------|----------|
| | USDA: ENT DOWNLOAD NSLP SDA executed | > |
| File Sele | | |
| Enter the fi | IL_SDOWN CACF executed without errors | > |
| File Name: | No file chosen | <u>↑</u> |
| ما الانتقا | 11) [| |

28. Click × (the Close button).

Image: NSLP Entitlement Budget for RA Screen

| | | and in the local division of the local divis | Uplead Downlos | Ad Maintain 1 | New Report | | | | | | |
|------------------|--------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|-----------------------------------|--------------------|--------------------|--------------------------|-------------------------------|------------------------------------------|--------------|----------------------|
| | | | | | Meal Rate** | FNS Meal Rate A | ci en | | | | |
| BP SDA # | ntitlement Progr | ram#= | | Program yea | ar 4 S | | \$ | | | | |
| D: Dept. of N | ISLP NATION | AL SCHOOL | LUNCH PROGRA | M 2020 | 0.2765 | 0.0 | 000 | | | | |
| M A | Aeal Counts _{ex.} Actual | 80% of m Kosher | Meal Estimated an Increase | Total Meal Count ^{®®} | Meal S Value## | Entitlement Adj 💷 | Entitlement Sub-Total | Cash/CLOC Pre-Yr Actual ** | Cash/CLOC meals Avg. Gount for SDA Ad | Meal Count®1 | Previous Carry-Ov |
| BP SDA# | EA | EA. | EA | EA | \$ | S | 5 | \$ | EA | EA | |
| TX Dept. of | b) (4) | | | | | | | | | | |
| | | Meal Count | t Initial Allocated | d Ent. Amt. Adju | ustment between RA | s DOD Fresh F | inal Commodity En | titement | | | 10 - 02 |
| | | E | A | | | 5 5 | | | | | |
| Entitlement to S | 5DA by FN5 | (h) | | | | | | | | | |
| Ensitiement to R | RA by SDA | |) (4 | | | | | | | | |
| SDA Entitlemen | nt Unallocated | | | | | | | | | | |
| | | Meal | Count ^a Ent Am | t Distributed per | Meal Count®" Adj | ustment between R/ | Aser DOD Fresh | ** Final Commo | odity Entitlement#** | | |
| | | | | | | | | | | | |

29. Click Re-Calculate (the Re-Calculate button) to display the updated data.



Image: SDA Entitlement Budgeting for NSLP Screen



- **30.** Click Save (the Save button) to save the changes.
- **31.** The transaction is complete.



RESULT

Entitlement for the selected program year has been updated for one or more RAs. This may have included manually entering values in WBSCM or uploading a data file to update multiple line items.



PROCESS OVERVIEW

Purpose

Users with the WBSCM Recall Contact role follow this procedure to update recall contact information. Recall contacts receive a notification when a commodity is put on hold or recalled. When a recall occurs, a user with the FNS Recall Specialist Notification role administers a recall notification that is sent to the recall contact user. The notification is delivered according to the Recall Contact's notification preferences, which may include:

- Email
- Telephone
- SMS (text message)
- Mobile Phone

Recall Contacts must have a minimum of two contact methods. The notification will initially be delivered through the Recall Contact's first notification preference. If no confirmation is received, the notification will be delivered through the second notification preference.

Access to the recall communication fields in the user profile only appear for those users with the Recall Contact role. Other users will not see these fields displayed in their user profile.

User Administrators (User Admins) can update general contact information through the **Manage Users** transaction; however, they cannot update recall contact information, which is only accessible to a Recall Contact through the **Maintain User Profile** transaction.

Process Trigger

Perform this procedure to review or update recall communication methods. Users must update their own profiles. This process is intended for the WBSCM user whose profile needs to be managed.

Prerequisites

- The WBSCM user must exist in the system.
- The user must have been assigned a USDA or SDA Recall Contact role.

Portal Path

Follow the Portal path below to complete this transaction:

• Select Admin tab → Manage Users folder → Maintain User Profile link.

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
 - Required (R) a mandatory field necessary to complete the transaction
 - **Optional (O)** a non-mandatory field not required to complete the transaction
 - Conditional (C) a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Portal Basic Navigation course for tips on creating favorites, performing searches, etc.



PROCEDURE

1. Start the transaction using the Portal path Admin tab → Manage Users folder → Maintain User Profile link.

Image: Maintain User Profile Screen

| Home | Operations | Finance | Admin Ro | oorts Help | |
|----------|------------------|---------|------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|--------------------|
| Manage U | aera Master | Data | | | |
| | | | Admin > Manage | Users > Maintain User Profile | Full Screen Option |
| - Maint | ain User Profile | | Welcome to All required fields a Dates are formatted | Maintain User Profile emarked with a red asterisk (*) as MMIDD/YYYY | |
| | | | My Profile Deta | ils | |
| | | | Name | | |
| | | | Title: [* First Name:] * Last Name: [| ahn | |
| | | | Address | | |
| | | | Street1: City: | 123 Main Street House Number. | |
| | | | Region or State. Country: | Virginia Postal Code: 12345 | |
| | | | Communicatio | | |
| | | | Method | Value (Number / E-mail Address) | |
| | | | Email address | jehn.dee@emeil.com | |
| | | | | | |
| | | | Recall Commu | ication | |
| | | | NOTE: If applies Method | ble, enter phone number extensions using format, e.g. 123-456-7990EXT100. Value (Number / E-mail Address) Recall Contact Preference | |
| | | | Email address | john.doe@email.com Preferred Method#1 💌 👕 | |
| | | | Telephone | 703-555-1234 Preferred Method #2 | |
| | | | | | |

2. Click 🔍 (the Hide Navigator arrow) to minimize the Portal menu. Note this can be done on any transaction in WBSCM.



(Note) Only users with the Recall Contact role are able to see and edit fields in the *Recall Communication* section.



(Note) This document describes the use of the *Recall Communication* fields. To review and edit other parts of the user profile, use the <u>Maintain User Profile</u> work instruction.



Image: Maintain User Profile Screen

| Address Address Address Streett 123 Main Street City Springfeld Region or State Virginia Country USA | Fui Soreen Opp |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| Inte: Inte: First Name: John Address Doe Address Street: I23 Main Street: House Number City: Springheld Region or State: Virginia Country: USA | |
| | |
| | |
| Address Street1: 123 Main Street City: Springfield Region or State: Virginia Postal Code 12346 Country: USA Communication Communication | |
| Street: 123 Main Street House Number City Springtield Region or State: Virginia Posial Code 12345 Country USA Communication Communication | |
| City: Springfield Region or State: Virginia T Posial Code 12345 Country: USA T Cemmunication | |
| Region or State: Virginia Postal Code 12346 Country: USA T Communication | |
| Country: USA T | |
| Communication | |
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| | |
| Mathead Value / Neuropean / Franci / Franci / Franci / Franci | |
| methodo value (Number / E-mail Address) | |
| | |
| | |
| | |
| | |
| Recall Communication | |
| | |
| NOTE: If applicable, enter phone number extensions using format, e.g. 123-456-7890EXT100. | |
| Method Value (Number / E-mail Address) recail Contact Preference | |
| Ensil address john.doe Gemail.com Preferred Method #1 | |
| TOO EEE 4024 | |
| | |
| | |

3. Perform one of the following:

| - | |
|-----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|
| lf | Then |
| The user needs to add a new recall communication method | In the Method field, choose the type of communication from the available list of options |
| | Enter the value in the Value (Number / E- mail Address) field. |
| | 3. Select the Recall Contact Preference . |
| The user needs to edit the value of an existing recall communication method | Click in the Value (Number / E-mail Address) field for the existing |
| | communication method. |
| | 2. Type the new value. |
| | 3. Select the Recall Contact Preference . |
| The user needs to change or delete an existing recall communication method | Click ⁽¹⁾ (the Trash Can icon) to clear saved fields. |
| | (Note) To add a new recall communication method to replace the one removed, see steps above. |
| The user does not need to make any changes to recall communication methods | Go to Step 4. |



| · · · | - | , |
|-------|---|---|
| 1 | - | |

(Note) Available recall communication methods are **Email Address**, **Mobile Phone**, **SMS** (Text Message), and **Telephone**.

(Note) It is critical that the user regularly maintain their recall contact information to ensure that recall notifications are received immediately when a material has been placed on hold or recalled.

At a minimum, a Recall Contact must select at least two recall communication methods.

The Recall Preferences allow Recall Contacts to determine the order of the method in which recalls are communicated. **Preferred Method #1** is the communication method that is used first when products are recalled. If confirmation of receipt isn't received, the notification will be distributed via the next preferred method.

Image: Maintain User Profile Screen

| Inte: L * First Name: J | ohn | | | | | | |
|------------------------------------------------------------------------------------------------------|-------------|----------------------------------------------------------------------------------------------------------------|---------------------------------------|---------------------------------|--------------------------------------------------------------------|----|------|
| * Last Name: D | oe | | 3 | | | | |
| Address | | | | | | | |
| Street1. | 123 Mair | 1 Street | | House Numbe | HC. | | |
| City. | Springfie | ld | | | | | |
| Region or State | Virginia | * | | Postal Cod | e 12345 | | |
| Country: | USA | | | - | | | |
| Communication | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Method | Vali | Je (Number / E-mail Address |) | 12 | | | |
| Method Emeiliscores | Vali joh | n doe@emeil.com |) | | | | |
| Method Email sodress | Vali | ie (Number / E-mail Address n doe@email.com | | î | | | |
| Method Email sodress | Vali | re (Number / E-mail Address n doe@emeil.com |) | | | | |
| Method Email address | Vali | Je (Number / E-mail Address n doe@emeil.com |) | 1 1 1 1 1 | | | |
| Method Email address Recall Commun | Vali joh | Je (Number / E-mail Address n dce@emeil.com | | 1 1 1 1 1 1 1 | | | |
| Method Email scoress Recall Commun | Vali joh | phone number extensions u |) sing format, e.g. 123 | -458-7890EXT100 | | | |
| Method Email address Recall Commun NOTE: If applica Method | Vali joh | phone number extensions u Value Number F. Email Ac |) sing format, e.g. 123 dress } | -458-7890EXT100 Rt | ecali Contact Preferen | ce | |
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| Method Email address Recall Commun NOTE: If applica Method Email address Telephone | Vali joh | phone number extensions u Value Number extensions u Value Number / E-mail Ad]ohn doa generations |) sing format, e.g. 123 dress } | -458-7890EXT100 R | ecall Contact Preferen referred Method #1 referred Method #3 | | |

4. Click Update (the Update button).

(Note) A message that the data was saved successfully is displayed.



Image: Maintain User Profile Screen

| ge overe more and | ta | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|--------------------------------------------|----------------------|
| ulmin > Manage Users | > Maintain User Profile | | Full Screen Option |
| Data was saved aucces | stuly | | |
| Velcome to Mainta I required fields are marke stes are formatted as VMV | ain User Profile d with a reid asterisk (*) | | |
| Wy Profile Details | 1054 Ball | | 8 |
| Nama | | | |
| | 1020 | | |
| Title: | | | |
| * First Name: John | | | |
| - Lask Wallie. Due | | | |
| Address | | | |
| Street 1: 123 Ma | in Street | House Number. | |
| City: Springt | ield | | |
| Region or State: Virginia | 8 | Postal Code: 12345 | |
| Country: USA | × | | |
| Communication | | | |
| Method Va | lue (Number / E-mail Address) | | |
| Emell address | hn.doe@email.com | | |
| | | U | |
| - | | 0 | |
| X | | 6 | |
| Recall Communication | | | |
| | | | |
| NOTE: If applicable, ent | Volue (Mumber extensions using format, e.g. 123-450 | Produckt 100. Recall Contact Proference | |
| Email address | ichn doe@ensil.com | Preferred Method #1 | |
| SMS (Telef Massage) | 703-555-7878 | Prefamed Mathod #2 | |
| the second s | | | |

5. The transaction is complete.



RESULT

The recall communication information has been updated, including method, contact information, and the order of preference.



PROCESS OVERVIEW

Purpose

A Recipient Agency (RA) is a domestic customer organization that can create domestic requisitions in WBSCM. RA organizations are created and maintained by State Distributing Agency (SDA) Org Admins. SDA Org Admins use this transaction to modify an existing RA Organization in the WBSCM system. Some attributes can also be maintained by the RA Org Admin.

Note: An SDA cannot delete an RA. Contact the WBSCM Service Desk for assistance to delete an RA from WBSCM.

Process Trigger

Use this transaction to alter information for an existing RA Organization in the WBSCM system.

Prerequisites

The RA Organization must already exist in the WBSCM system before its information can be changed.

Portal Path

Follow the Portal path below to complete this transaction:

• Select Admin tab → Organization Maintenance folder → Maintain Organization link → Update RA Organization link to go to the Update RA Organization screen.

Tips and Tricks

- The R/O/C acronyms in the field tables represent Required, Optional, or Conditional field entries.
 - Required (R) a mandatory field necessary to complete the transaction
 - Optional (O) a non-mandatory field not required to complete the transaction
 - Conditional (C) a field that may be required if certain conditions are met, typically linked to completion of a mandatory field
- Refer to the WBSCM Help site, *Frequently Referenced Training Materials* section for basic navigation training and tips on creating favorites, performing searches, etc.



PROCEDURE

1. Start the transaction using the Portal path: Admin tab → Organization Maintenance folder → Maintain Organization link.

Image: Maintain Organization Screen



2. Click (the **Hide Navigator** button) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.



Image: Maintain Organization Screen

| ige Users Mester Deta Organization Maintenance | |
|----------------------------------------------------------|----------------|
| Admin > Organization Maintenance > Maintain Organization | Full Screen Dp |
| Nelcome to the Maintain Organization Application | |
| Update my Organization | |
| Create RA Organization | |
| Undate RA Croenization | |
| Greate Co-op Organization | |
| Update Co-op Organization | |
| Nasa Assign/Un-assign Ship-To | |
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3. Click Update RA Organization (the Update RA Organization button).

Image: Select Sub-Organization Screen





4. Click 💌 (the RA drop-down).



(Note) SDA Org Admins are able to choose from the RAs within their organization hierarchy.

If the user is an **RA Org Admin**, their own organization's profile will display, and they do have the option to select other RAs.



(Note) WBSCM defaults to display active RAs in the drop-down when Active (the Active radio button) is selected. If the user needs to display inactive RAs, click Inactive (the Inactive radio button) prior to clicking in (the RA drop-down).

Image: Select Sub-Organization Screen



5. Select the appropriate RA from the list. In this example, WEST TEXAS FOOD BANK / ODESSA TX (4005487) (the WEST TEXAS FOOD BANK / ODESSA TX (4005487)) is selected.



(Note) Only one RA can be modified at a time.

(Note) The available RAs are listed in alphabetical order by name. Use the vertical scrollbar to search through the list, or type the first letter of the name to select from RA organizations that start with that letter.



Image: Select Sub-Organization Screen

| ce Users Master Data Organization Maintenance | |
|-----------------------------------------------------------------------------------------------------------------|----------------|
| Admin > Organization Maintenance > Naintain Organization | Full Screen Dp |
| | |
| Select Sub-Organization | |
| Select the appropriate radio button to display a list of active or inactive sub-organization(s) to oboose from. | |
| Active C Inactive | |
| RA: WEST TEXAS FOOD BANK / ODESSA TX (4005487) | |
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6. Click Next (the Next button).

7. Perform one of the following:

| lf | Then |
|-------------------------------------------------------------------|----------------|
| The user needs to update an existing RA organization | Go to Step 8. |
| The user needs to activate/inactivate an existing RA organization | Go to Step 20. |
| The user needs to submit the updates | Go to Step 24. |



Image: Update RA Organization (Address) Screen

| Admin > Organiza | tion Maintenance > Naintain Organization | | Full Screen |
|------------------------------------------------------------------------|---------------------------------------------------------------------------|-----------------------------------|-------------|
| Update RA Org Back Address | nization - Organization ID: 4005487 Relatorship Programs Niscellaneous | Status | |
| All required field | are marked with a red asterisk (*). | | |
| * Nam Additional Nam | e: West Texas Food Bank | | |
| Address | | | |
| * Street Addres Street Addres Street Addres * Cil * Counts | s t: 1003 Easl Second Street s 2: | T | |
| ≠ Stat + Count | e Texas V Odessa | * Postal Code: 79781 * Zone: 5 | |
| | | | |
| Submit | | | |
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8. As required, complete/review the following fields:

| Field | R/O/C | Description |
|-------------------|-------|------------------------------------------------------------------------------------------------------------------------------|
| Name: | R | Person or business partner's name. Example: West Texas Region RA Food Bank |
| Additional Name: | 0 | A free text field to enter an additional name or name of recipient. |
| Street Address 1: | R | A free text field in which to enter the street address of the user or organization. Example: 123 Main Street |
| Street Address 2: | 0 | A free text field in which to enter the street address of the user or organization. |



| Field | R/O/C | Description |
|-------------------|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Street Address 3: | 0 | A free text field in which to enter the street address of the user or organization. |
| City: | R | City where the user or company is located. Example: Odessa |
| Country: | R | Country code that represents country name. Example: USA (Note) The Country Image (Drop-down button) displays a list of countries. |
| State: | R | The abbreviation or name of United States territory, district or state. Example: Texas (Note) The State I (Drop-down button) displays a list of states and territories. |
| Postal Code: | R | A ZIP code. Example: 79765 |
| County: | R | Region or geographical area. Example: Odessa |
| Zone: | R | Identifying number assigned to an RA by their SDA. Example: 5 |



Image: Update RA Organization (Address) Screen



9. Click Relationship (the Relationship tab) to review and modify relationships between the RA and the Business Partners.

Image: Update RA Organization (Relationship) Screen

| Available Business Partners | |
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| Ausign b | |
| It/ Business Partner (Name/City State, BP Number) | |
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10. Click 💽 (the Business Partner Relation drop-down).



(Note) Business Partner types include:

- Has Plant Each RA is associated with an SDA. The SDA can have one or more National Warehouse Plants assigned to it. The plant(s) assigned to the SDA are listed under the Available Business Partners section, from which the user may select when assigning a plant to their RA.
- Has Ship-To Each RA can have one or more Ship-To locations where the RA will ٠ receive ordered materials.

Image: Update RA Organization (Relationship) Screen

| fome Operations Admin Reports Help | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|---------------|
| insge Users Master Data Organization Maintenance | | |
| Admin > Organization Maintenance > Maintain Organization | | Full Screen D |
| Update RA Organization - Organization ID: 4005437 Address Relationship Programs Nilscellaneous Address Partner Relation: Has Plant Has Shart Has Shart Kassigned Business Partner (Name/Caty State, BP Number) (b) (4) | Status Available Business Partners | |
| Submt | | |
| | | |

11. Click the appropriate relationship type to select Business Partner(s) to assign/unassign to the RA. In this example, Has Ship-To (the Has Ship-To option) is selected.



(Note) The Business Partners are listed in alphabetical order. Use the vertical scrollbar to find the appropriate Business Partners. To select multiple business partners:

- - If the business partners are listed in consecutive rows, hold down the Shift key • and click the first and last select buttons.
 - If the business partners are listed in non-consecutive rows, hold down the Ctrl key ٠ while clicking each select button.

The multiple selection also applies to the Programs tab.



(Note) To filter the list of Business Partners click on the column Business Partner



(Name/City State, BP Number) field. Select (User-Defined Filter...) (the User-Defined Filter...) (the User-Defined Filter...) and enter required criteria. Use * (the Asterisk symbol) at the beginning and end of a search term (e.g., *Craven* or *5001716*) to search for a Business Partner that contains the term. The asterisk searches part of a word as well (e.g., *Califor*). See also the <u>Wildcard and Matchcode Searches</u> job aid. Select the (AII) option to remove the filter.

| Image: Update | RA Organization | (Relationship) Screen |
|---------------|-----------------|-----------------------|
|---------------|-----------------|-----------------------|

| Manage Users Master Data Organization Maintenance Atm > Organization Maintenance > Maintenance > Maintenance Update: RA Organization ID: 4005437 Calless Poorens Miscelaneous Status Relationship Programs Miscelaneous Status Rusiness Partner Relation: [Fas:Ship-To + Assigned Business Partner (Name/Chy State, BP Number) Business Partner (Name/Chy State, BP Number) Business Partner (Name/Chy State, BP Number) Massign Maintenance - Maintenan | Namese Users Materia Data Profile Advice Statute Advice Statute Advice Statute Advice | Home Operations Admin Reports Help | |
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| | Submit | Ubdate RA Organization ID: 4005487 Program Niscellaneous Status Activess Relationship Programs Niscellaneous Status Assigned Business Partner Relations Statuers Available Business Partners Image: City State. BP Number) (b) (4) (Assign Relations Partner (Name/City State. BP Number) Image: City State. BP Number) | |
| | | | |

12. Click (the Select button) to assign a Business Partner under the Available Business Partners section. In this example, the Business Partner (b) (4) is selected.



Image: Update RA Organization (Relationship) Screen



13. Click **Assign** (the **Assign** button) to assign the selected Business Partner to the RA. The Business Partner is moved to the *Assigned Business Partner* section.



(Note) To unassign Business Partner(s), click (the **Select** button) to select from the Assigned Business Partners section, and then click (the **Unassign**) (the **Unassign** button).



Image: Update RA Organization (Relationship) Screen



14. Click Programs (the Programs tab) to assign/unassign programs to the RA.



(Note) Only programs that have been assigned to the user's SDA by FNS will display.



Image: Update RA Organization (Programs) Screen

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| Soup Kitchen and Food Banks | | Summer Food Service Program | |
| Commodity Supplemental Food Pr | A Anning I | Commodity Supplemental Food Pr | |
| Child and Adult Care Food Prog | Upassion b | Charitable Institutions | |
| | Criscogri (| Trade Mtigation - TEFAP | |
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15. Click (the **Select** button) to select the Program under the *Available Programs* section. In this example, the **Summer Food Service Program** is selected.

Image: Update RA Organization (Programs) Screen





16. Click **Assign** (the **Assign** button) to assign the selected program to the RA. The program is moved to the *Assigned Programs* section.

(Note) To unassign programs, click (the **Select** button) to select the program from the *Assigned Programs* section, and then click (Unassign) (the **Unassign** button).

Image: Update RA Organization (Programs) Screen

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| pdate RA Organization - Organizatio | on ID: 4005487 | | |
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| Address Relationship Pr | ograms Mis | cellaneous Status | |
| Assumed Programs | - | Quailable Programs | |
| The Emergency Food Assistence | | Trade Mitpation - CSEP | |
| Soup Kitchen and Food Banks | | Summer Food Service Program | |
| Commodity Supplemental Food Pr | | Commodity Supplemental Food Pr | |
| Child and Adult Care Food Prog | 4 Assign | Charitable Institutions | |
| Summer Food Service Program | Unassign 🕨 | Trade Mitigation - TEFAP | |
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| | | Trade Mitigation - NSLP | |
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17. Click Miscellaneous (the Miscellaneous tab) to enter information, such as identifiers, for the RA.



Image: Update RA Organization (Miscellaneous) Screen

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| Update RA Organization - Organization ID: 4005487 | |
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| Submit | |

18. As required, complete/review the following fields:

| Field | R/O/C | Description | |
|-----------------------------------------|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| RA FIPS Code: | 0 | A unique code that is assigned to the recipient agency by the Federal government. Example: 239-723 | |
| ID number: (RA Identifier) | 0 | Identification number that SDAs use to identify the RAs in other systems. Example: 239-723 | |
| ID number: (Alternate RA Identifier) | 0 | Additional identification number that SDAs use to identify RAs in other systems. (Note) The ID Number field in the Alternate RA Identifier section is optional. This field is available for SDAs to enter an alternate ID for the RA, if necessary. In this example, the field is left blank. | |

19. Return to Step 7.



Image: Update RA Organization (Miscellaneous) Screen

| - offender under an and - manual offender | Full Screen |
|----------------------------------------------------|-------------|
| | |
| Update RA Organization - Organization ID: 4005487 | |
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| Address Relationship Programs Miscellaneous Status | |
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20. If necessary, click Status (the Status tab) to change the status of the RA.

Image: Update RA Organization (Status) Screen

| me Operations A | min Reports Help | |
|--------------------------------------------|-------------------------------------------------------------------------|------------------|
| nage Users Master Data | Organization Maintenance | |
| nin > Organization Mainten | nce > Maintain Organization | Full Screen Opti |
| Update RA Organizati Desk Address Re | In - Organization ID: 4005487 tionship Programs Miscellaneous Status | |
| Select the checkbox to | inactivate the organization. | |
| Inactivated On: | | |
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21. Click [] (the Inactive checkbox) to change the status of the RA.



(Note) If \square (the **Inactive** checkbox) is selected, deselecting will make the RA active. Also, the date from the **Inactivated On** field will be cleared automatically, as the organization is no longer inactive.

22. If necessary, enter any business reasons for active/inactive change in the **Comments** field. In this example, **Inactivated from 2/7** is entered.



(Note) When 🖾 (the **Inactive** checkbox) is checked, the **Inactivated On** field is auto-populated with the date the organization was inactivated. This field is not editable.

23. Return to Step 7.

Image: Update RA Organization (Status) Screen

| Adm > Organization Sorganization (D: 4005482 Bate Sate Sa | Be even in | aster Data Organization Maintenance | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|--------------------------------------------|--------|---------------|
| Update RA Organization - Organization ID: 4005487 Sata Image: Comments in activate the organization. Instruction Co: 02:07:02:02 Image: Comments in activate from 2/7 Comments in activate from 2/7 Image: Comments in activate from 2/7 Subort Subort | Admin > Organia | zation Maintenance > Maintain Organization | | Full Screen C |
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24. Click Submit (the Submit button) to update the RA record.

(Note) A confirmation message displays: "Business Partner XXXXXX updated successfully."



Image: Update RA Organization (Status) Screen



25. The transaction is complete.



RESULT

Updates to the RA organization were made in WBSCM, which may include changes to the address information, assigned national warehouse(s), ship-to location(s) and/or program(s), optional identifiers for the organization, as well as activation or inactivation of the RA organization.