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.

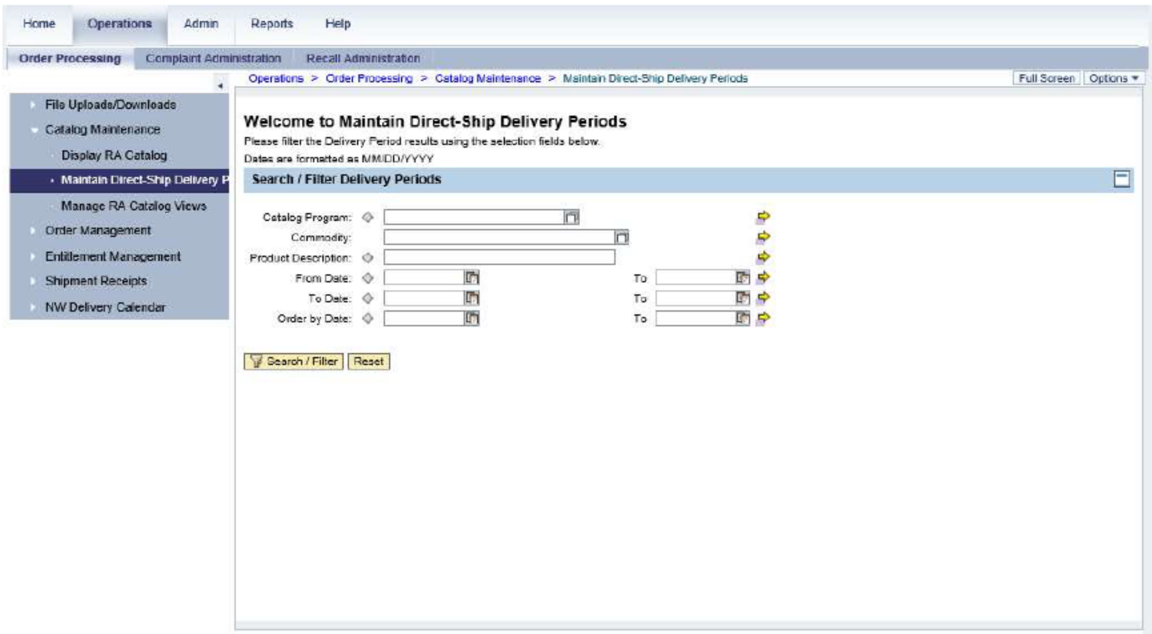
Tips and Tricks

- 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

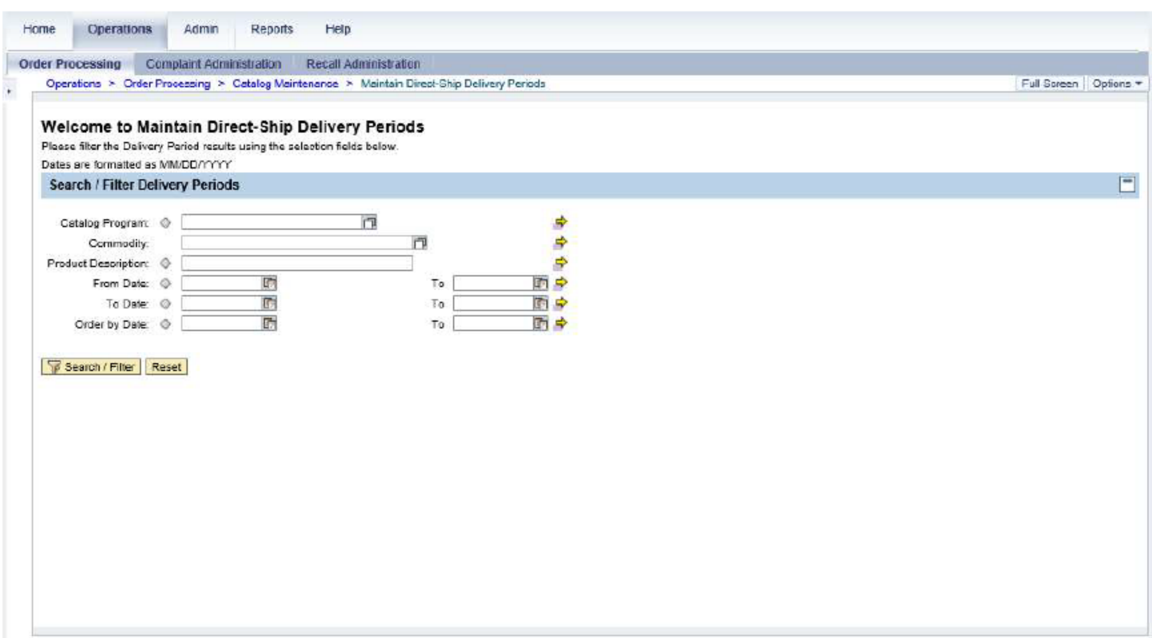
1. Start the transaction using the following Portal path: **Operations** tab ➔ **Order Processing** tab ➔ **Catalog Maintenance** folder ➔ **Maintain Direct-Ship Delivery Periods** link.

Image: Maintain Direct-Ship Delivery Periods Screen



2. Click (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



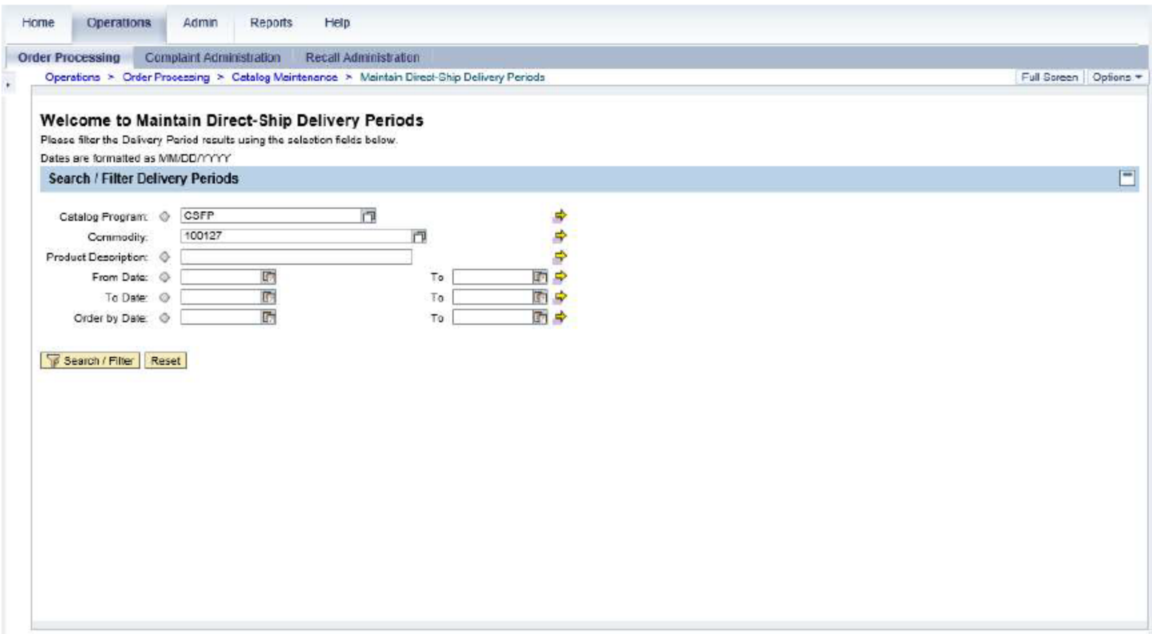
3. As required, complete/review the following fields:

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	O	Information used to characterize a material.
From Date	O	Beginning date. (Note) Users can enter a single date or a range of dates. Enter end date of range in the 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC**To** field.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC
To Date	O	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 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC**To** field.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC
Order by Date	O	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 1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC**To**

Field	R/O/C	Description
		field.1EA42E9629D548D187FD88222DE5565B61DAE25139534354BB63324476A7D0BC

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

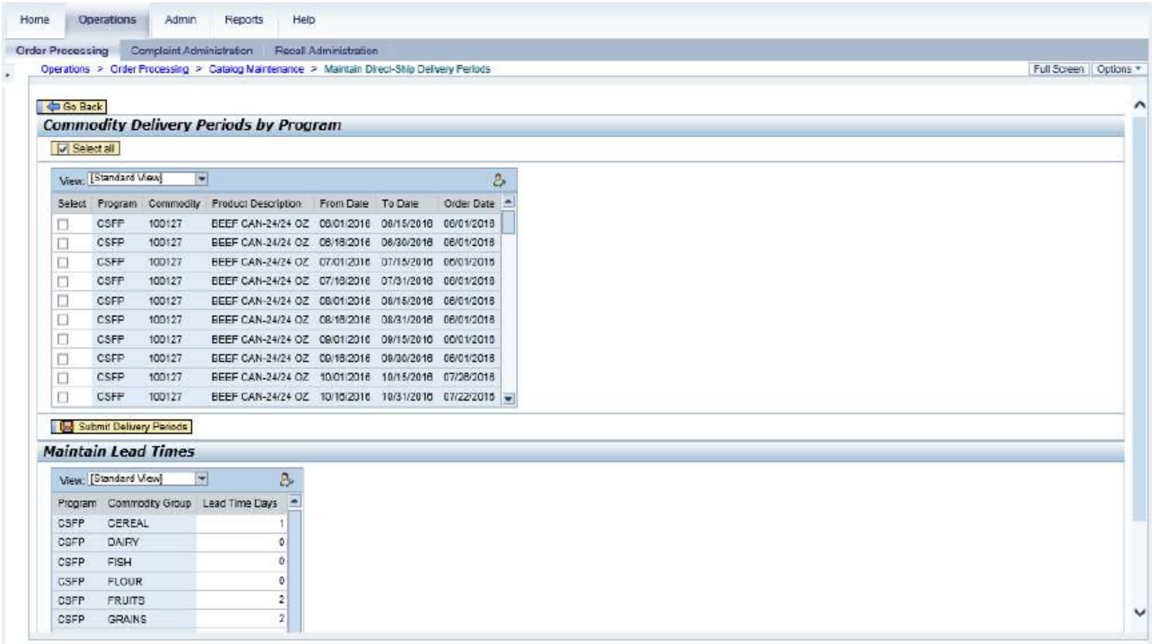
Image: Maintain Direct-Ship Delivery Periods Screen



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

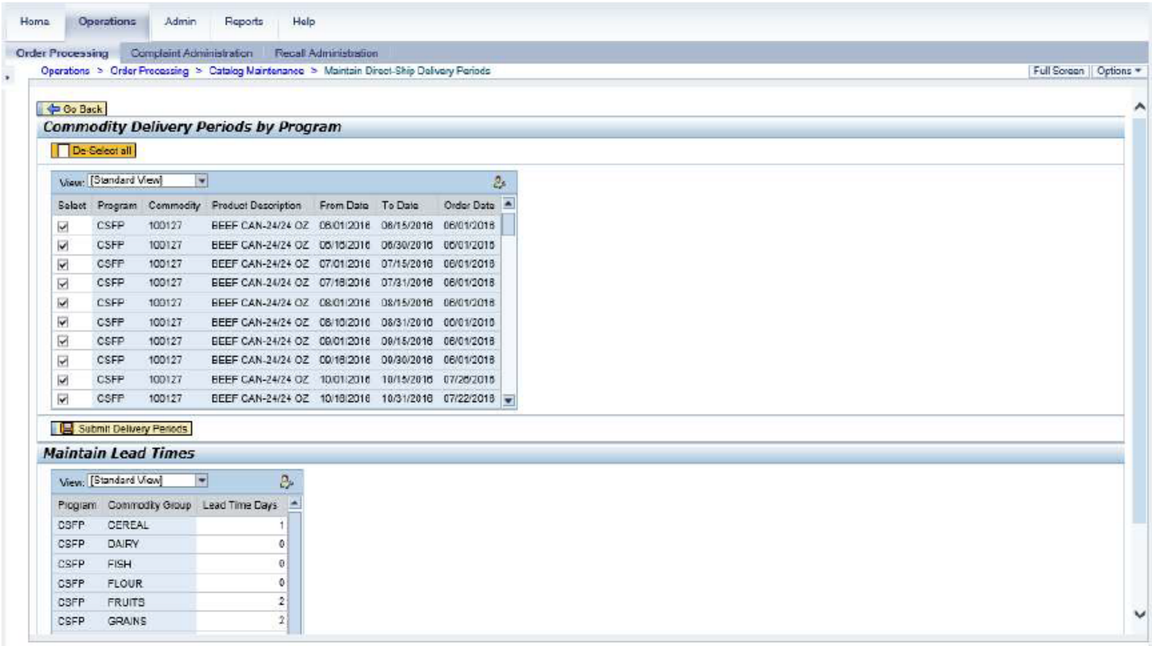


5. In the *Commodity Delivery Periods by Program* section, perform one or more of the following:

If	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 (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.

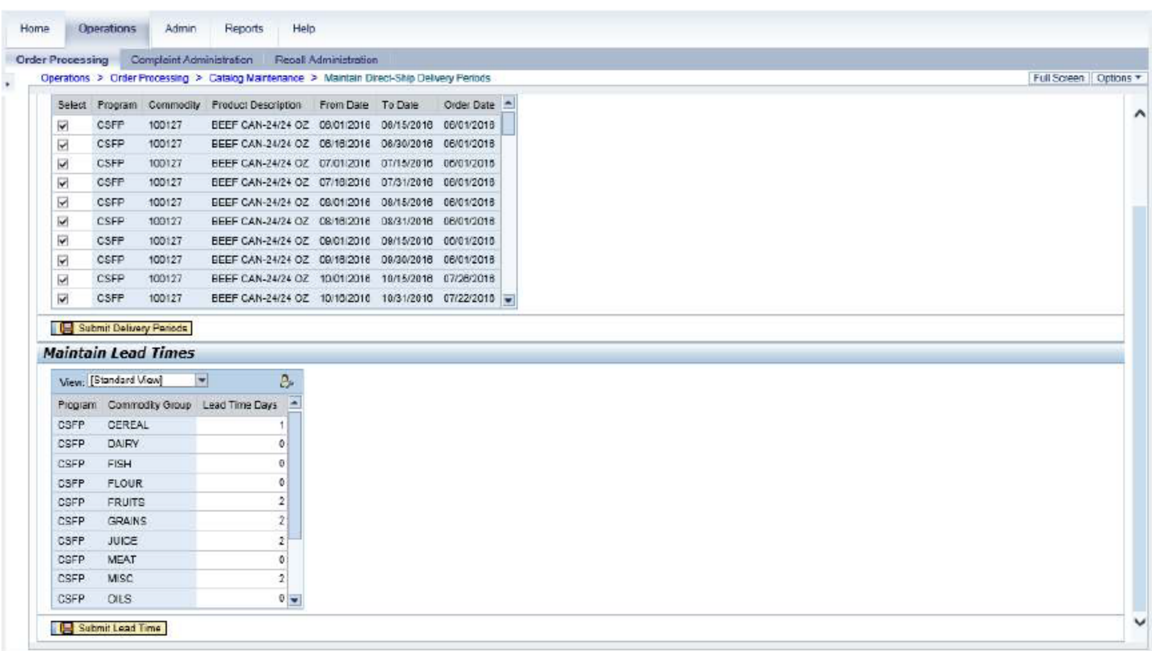
Image: Maintain Direct-Ship Delivery Periods Screen



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

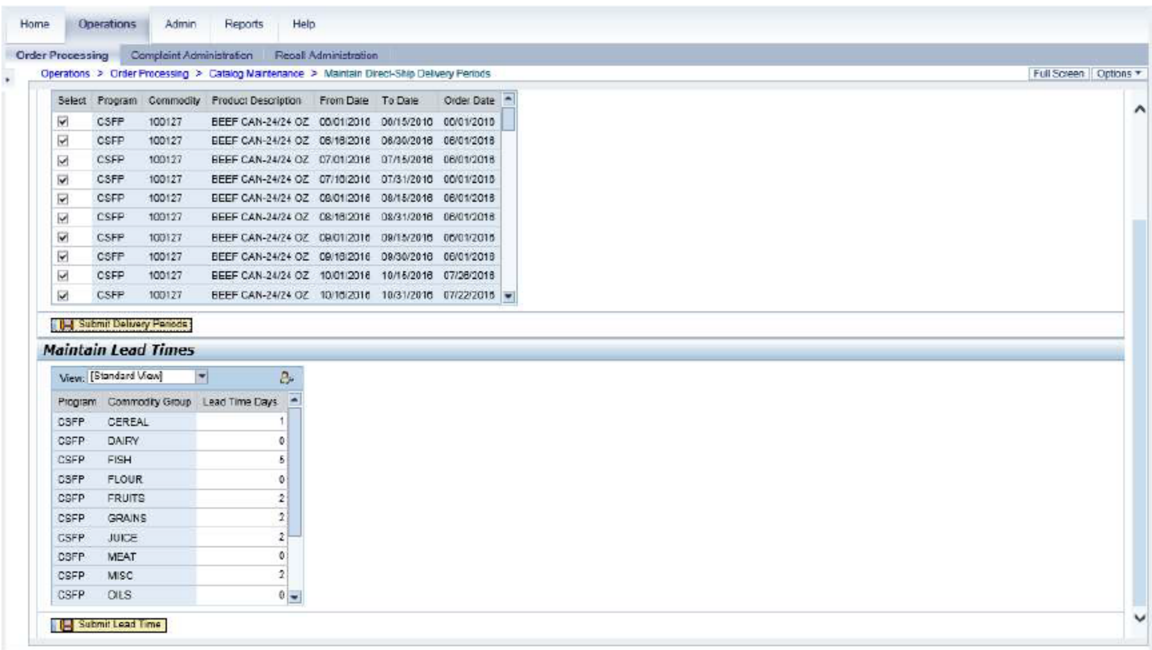


7. In the **Maintain Lead Times** section enter the number of **Lead Time Days** for the appropriate **Commodity Group**. In this example, a lead time of 5 days was entered for the FISH.

(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



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 RA Entitlement Budgeting by Program Job Aid 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

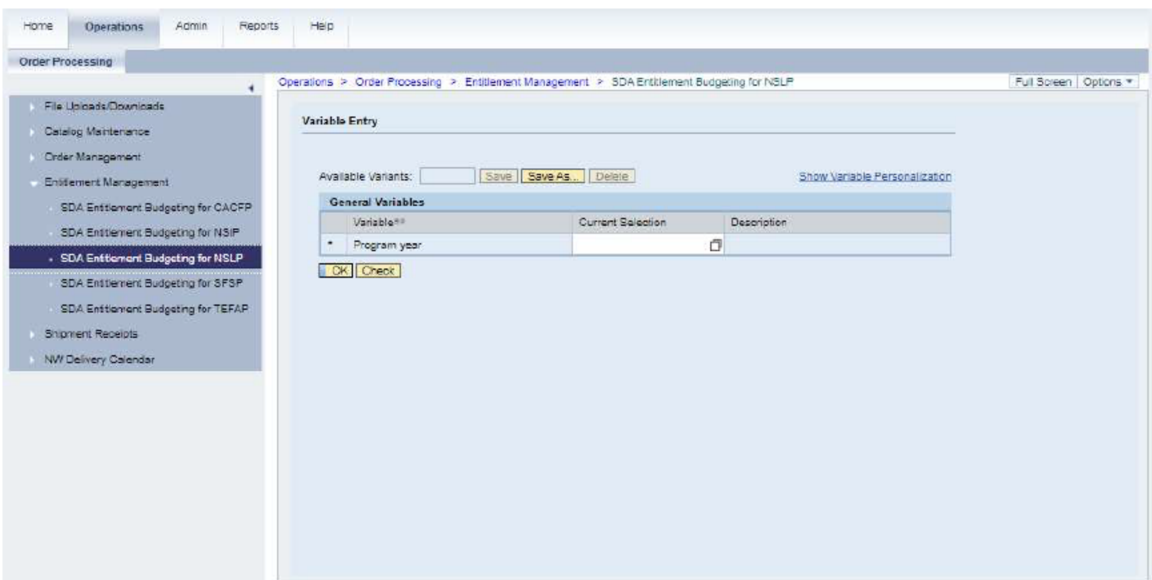
1. Start the transaction using the following Portal path: **Operations** tab ➔ **Order Processing** tab ➔ **Entitlement Management** folder.

2. Perform one of the following:

If	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.**

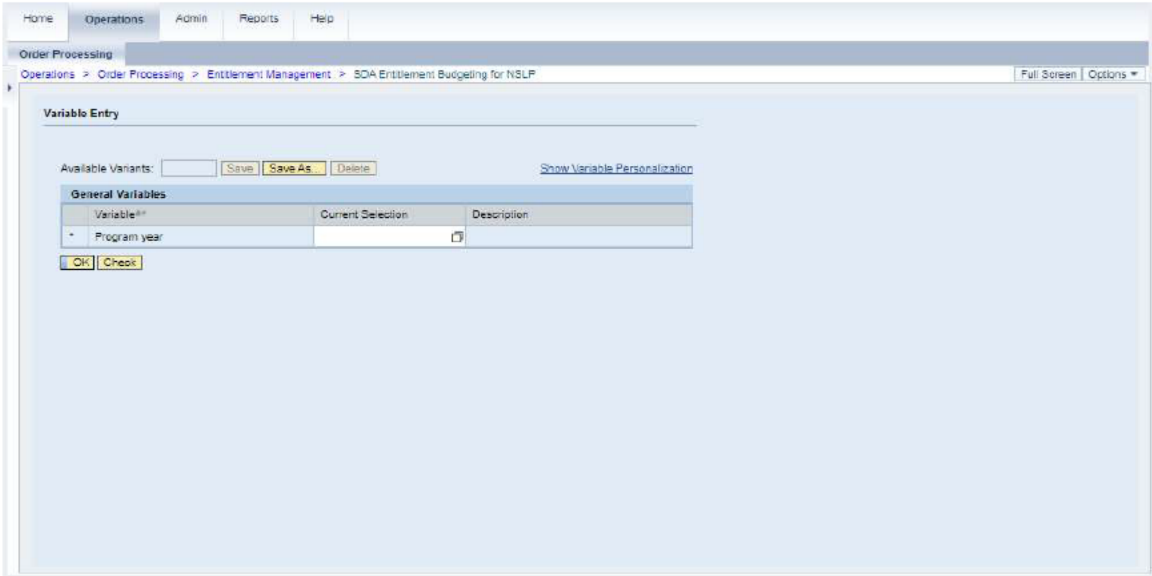
(Note) This work instruction uses NSLP as an example; however, the steps provided apply to all programs. Use the RA Entitlement Budgeting by Program job aid for a list of field definitions and portal paths for each of these programs.

Image: SDA Entitlement Budgeting for NSLP Screen



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



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

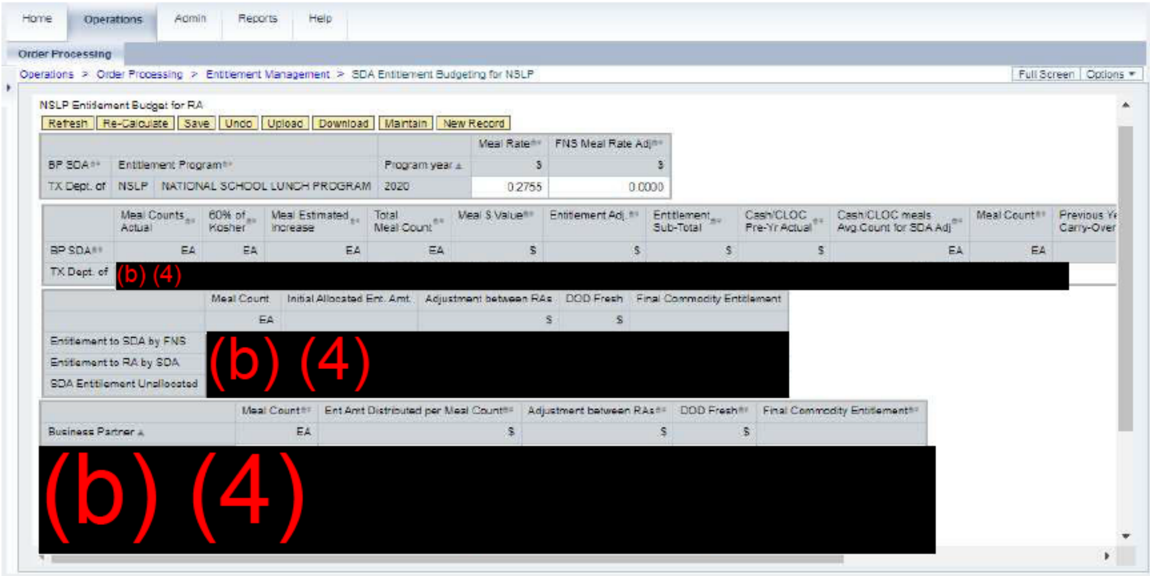
Field	R/O/C	Description
Program year	R	Year when the customer will be able to use the funds allocated for the specific program. **Example:** 2020

(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.

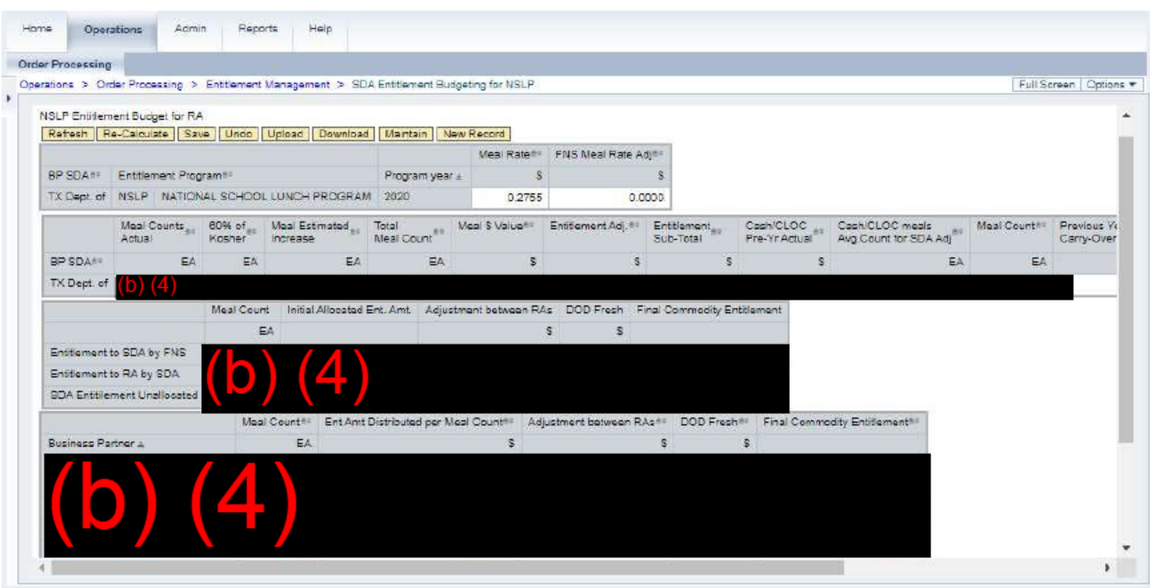
Image: SDA Entitlement Budgeting for NSLP Screen



7. Perform one of the following:

If	Then
The user needs to return to the search screen	Click Refresh (the **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

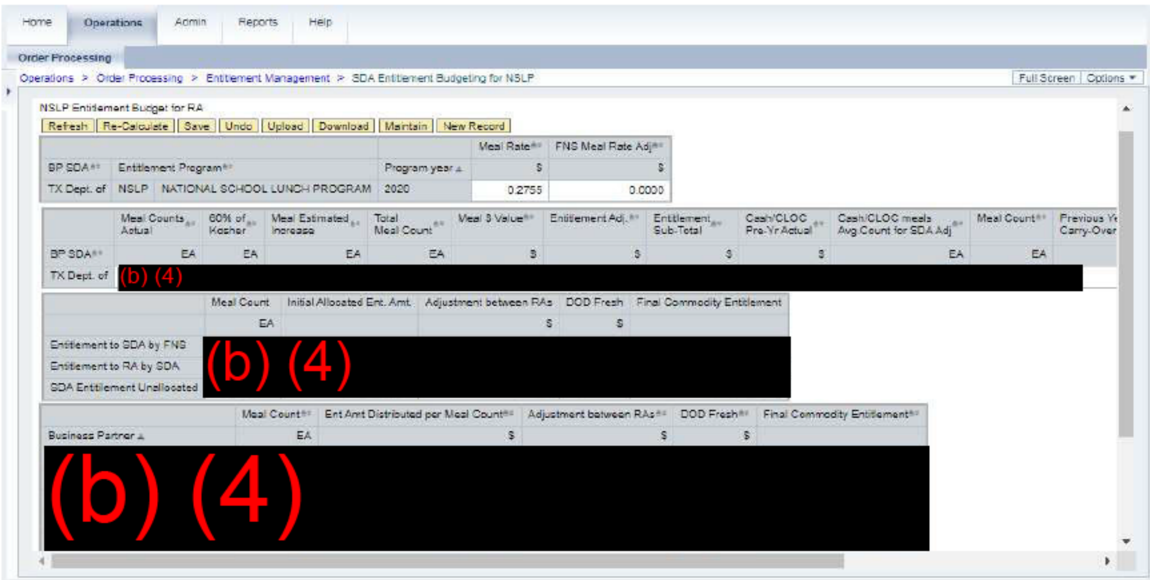


8. Click Maintain (the **Maintain** button) to enable edit mode to enter entitlement details.

(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).

(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



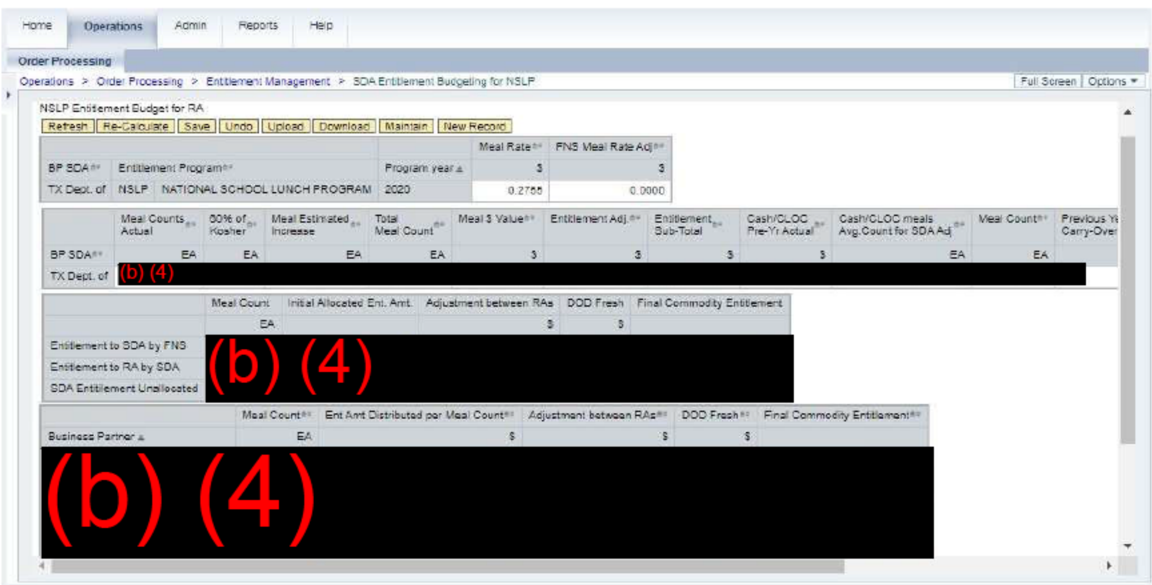
9. As required, complete/review the following fields:

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	O	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	O	The amount of the entitlement that has been allocated to spend on the USDA DoD Fresh program. **Example:** 2250.00 (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



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.

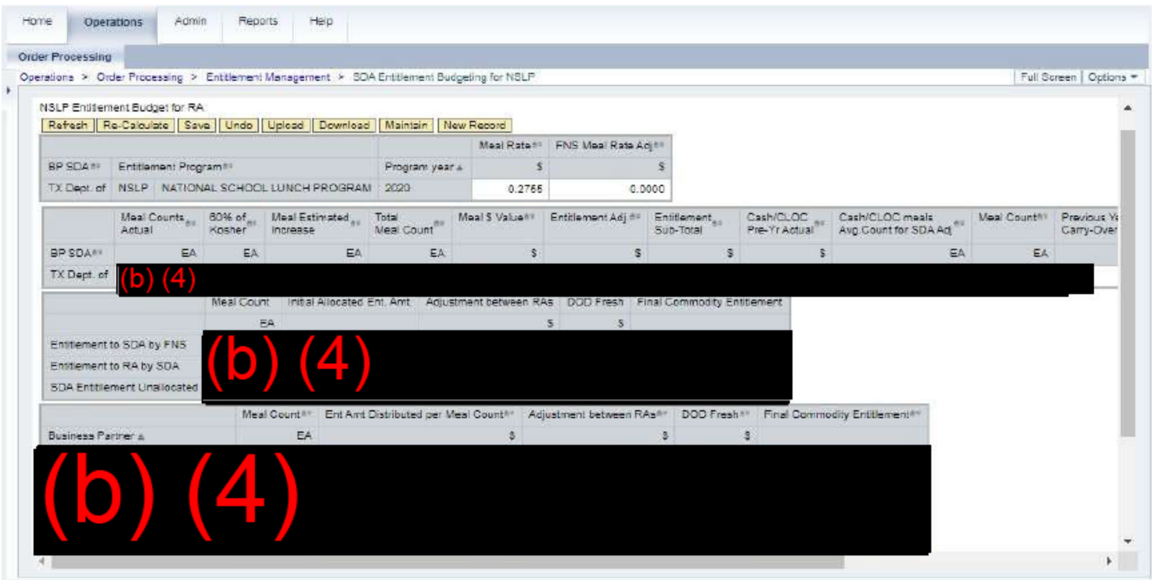
(Note) Depending on the number of **Business Partners** listed, it may be necessary to navigate to the last page of records to view the totals.

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

11. Perform one of the following:

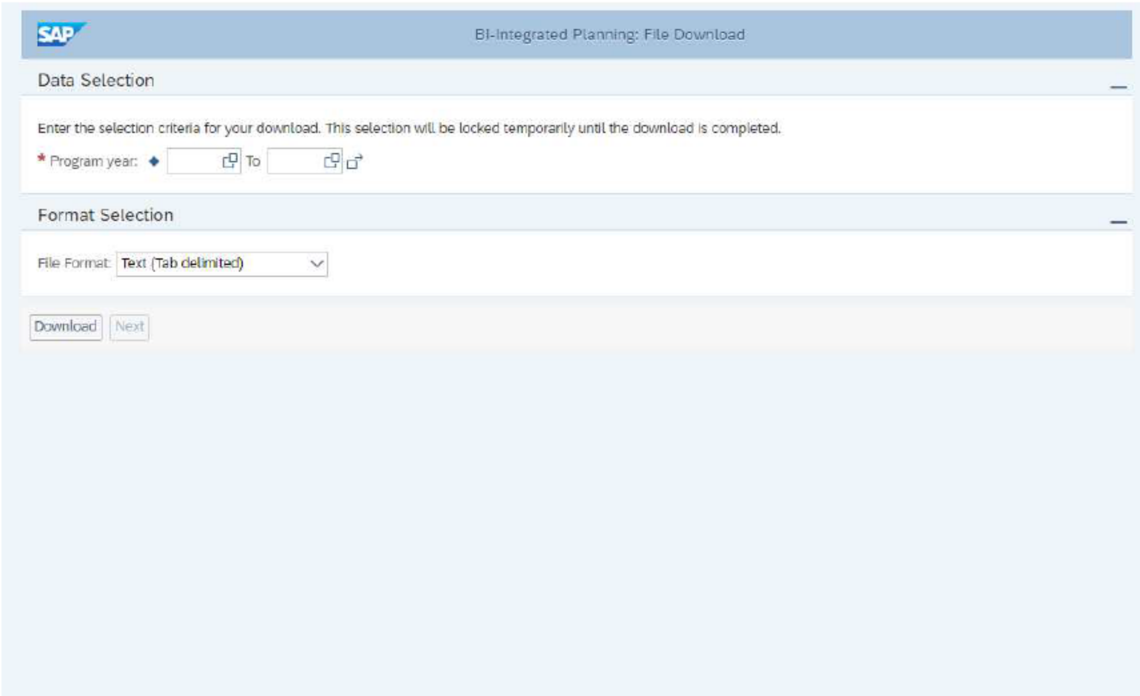
If	Then
The user needs to reverse changes made during re-calculation	Click Undo (the **Undo** button).
The user needs to save changes made using the re-calculation option	Click Save (the **Save** button).
The user is finished maintaining entitlements	Go to Step 31.

Image: SDA Entitlement Budgeting for NSLP Screen



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

Image: BI-Integrated Planning: File Download Screen



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

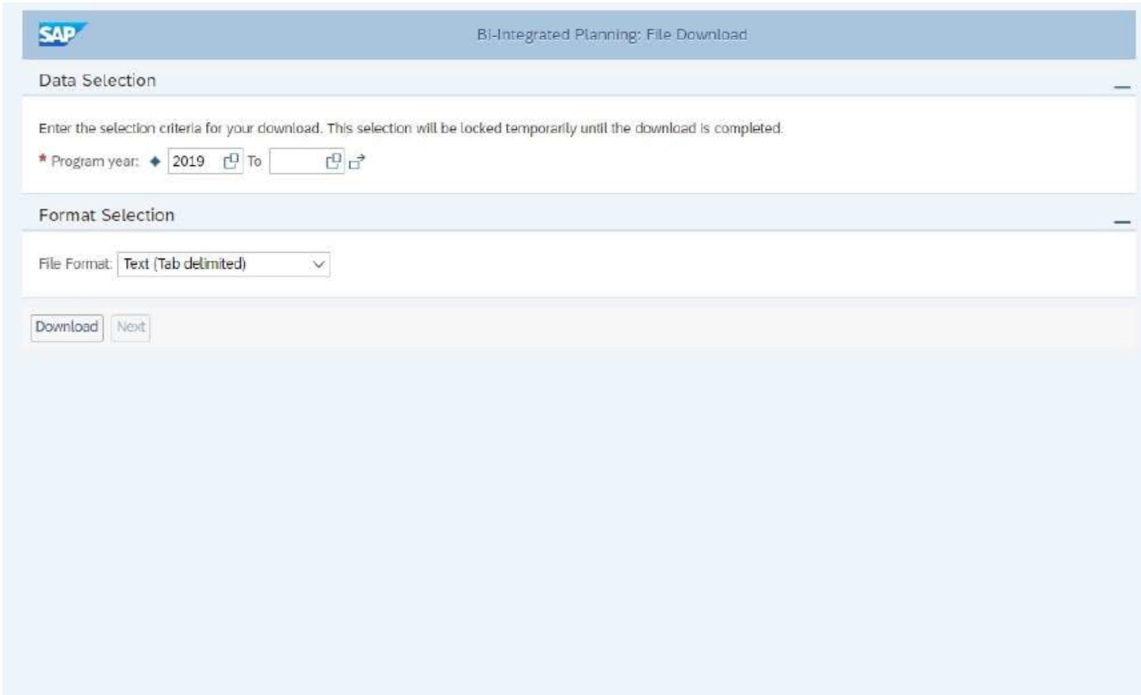
Field	R/O/C	Description
* Program Year	R	Year when the customer will be able to use the funds allocated for the specific program. **Example:** 2019 (Note) In this example, the year 2019 was used to update year 2020.

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**

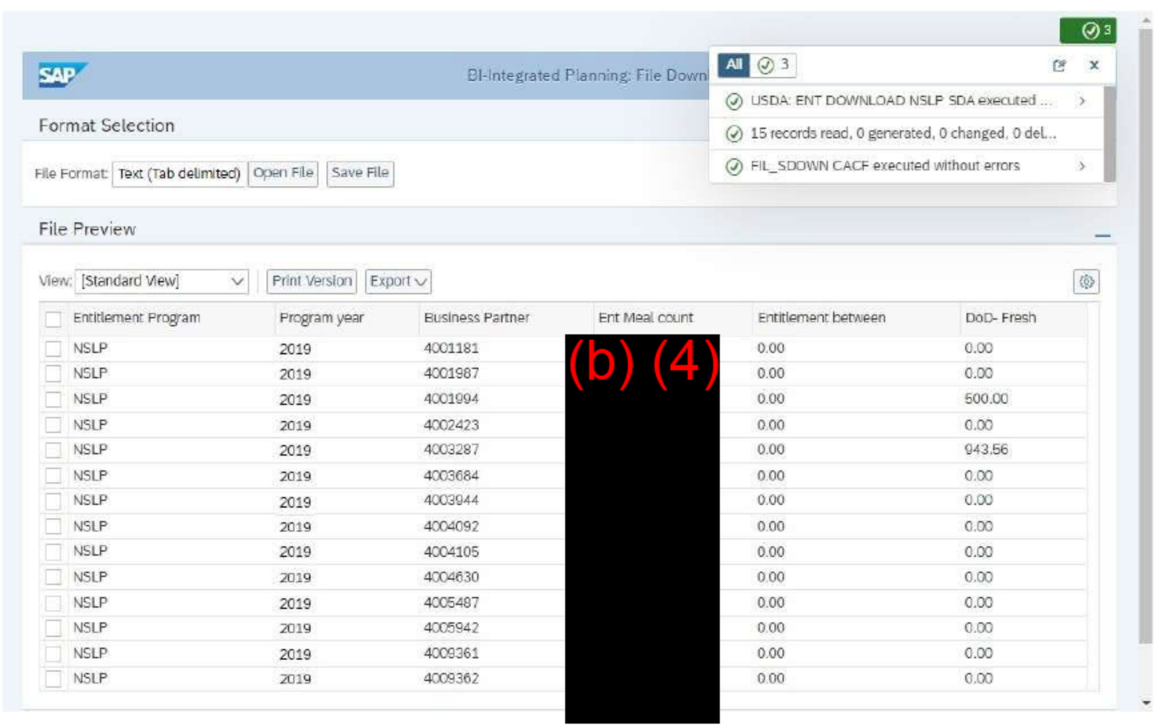
Image: BI-Integrated Planning: File Download Screen



15. Click Download (the **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

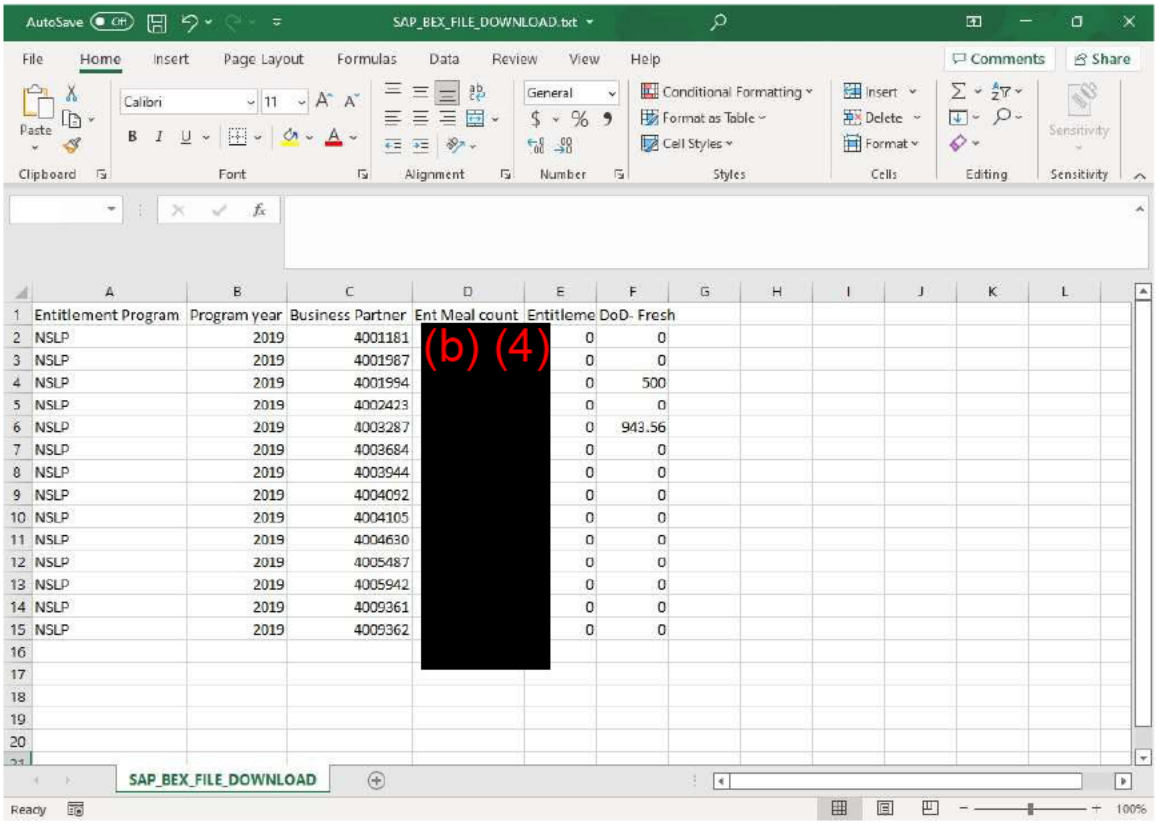


17. Click Save File (the **Save File** button).

(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



	Entitlement Program	Program year	Business Partner	Ent Meal count	Entitleme	DoD- Fresh
2	NSLP	2019	4001181	(b) (4) [redacted]	0	0
3	NSLP	2019	4001987	[redacted]	0	0
4	NSLP	2019	4001994	[redacted]	0	500
5	NSLP	2019	4002423	[redacted]	0	0
6	NSLP	2019	4003287	[redacted]	0	943.56
7	NSLP	2019	4003684	[redacted]	0	0
8	NSLP	2019	4003944	[redacted]	0	0
9	NSLP	2019	4004092	[redacted]	0	0
10	NSLP	2019	4004105	[redacted]	0	0
11	NSLP	2019	4004630	[redacted]	0	0
12	NSLP	2019	4005487	[redacted]	0	0
13	NSLP	2019	4005942	[redacted]	0	0
14	NSLP	2019	4009361	[redacted]	0	0
15	NSLP	2019	4009362	[redacted]	0	0

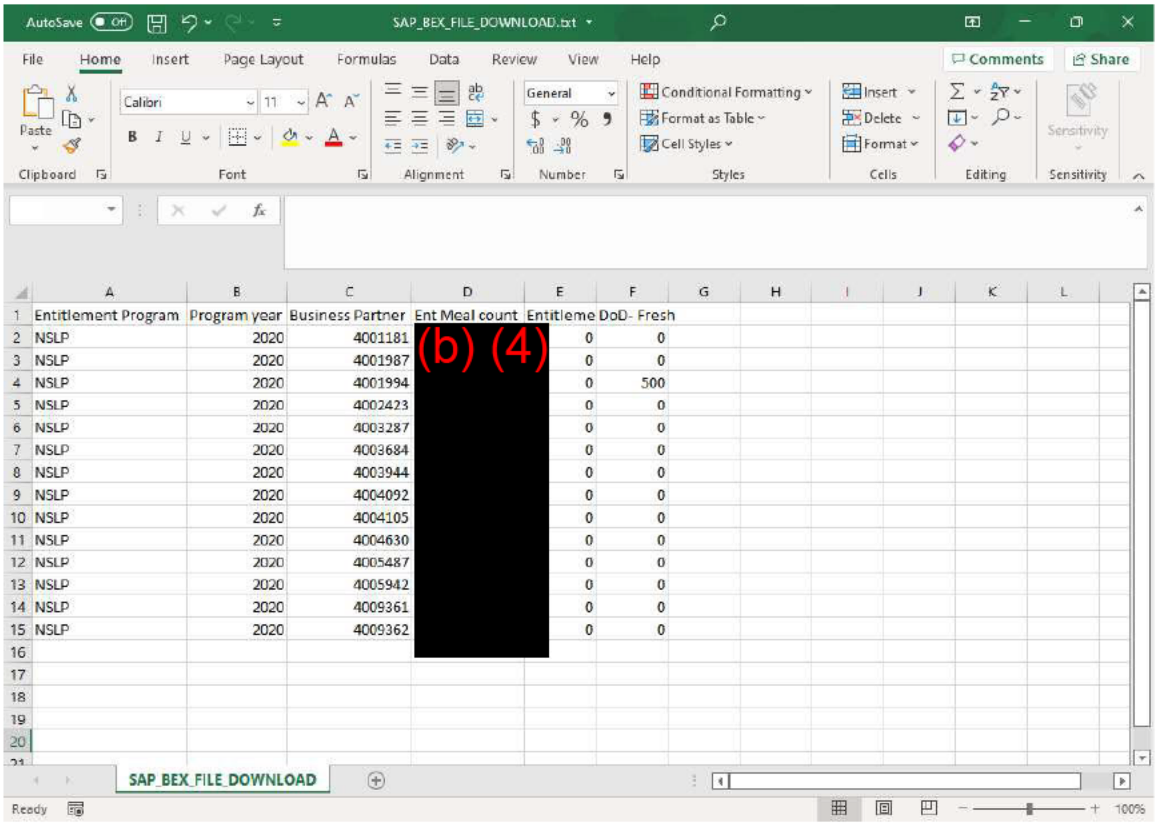
19. As required, complete/review the following fields:

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	O	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	O	The number of meals expected to be consumed during the entitlement budget period. **Example:** 42,000.00
Entitlement Between	O	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	O	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



	A	B	C	D	E	F
1	Entitlement Program	Program year	Business Partner	Ent Meal count	Entitleme	DoD- Fresh
2	NSLP	2020	4001181	(b) (4) [redacted]	0	0
3	NSLP	2020	4001987	[redacted]	0	0
4	NSLP	2020	4001994	[redacted]	0	500
5	NSLP	2020	4002423	[redacted]	0	0
6	NSLP	2020	4003287	[redacted]	0	0
7	NSLP	2020	4003684	[redacted]	0	0
8	NSLP	2020	4003944	[redacted]	0	0
9	NSLP	2020	4004092	[redacted]	0	0
10	NSLP	2020	4004105	[redacted]	0	0
11	NSLP	2020	4004630	[redacted]	0	0
12	NSLP	2020	4005487	[redacted]	0	0
13	NSLP	2020	4005942	[redacted]	0	0
14	NSLP	2020	4009361	[redacted]	0	0
15	NSLP	2020	4009362	[redacted]	0	0

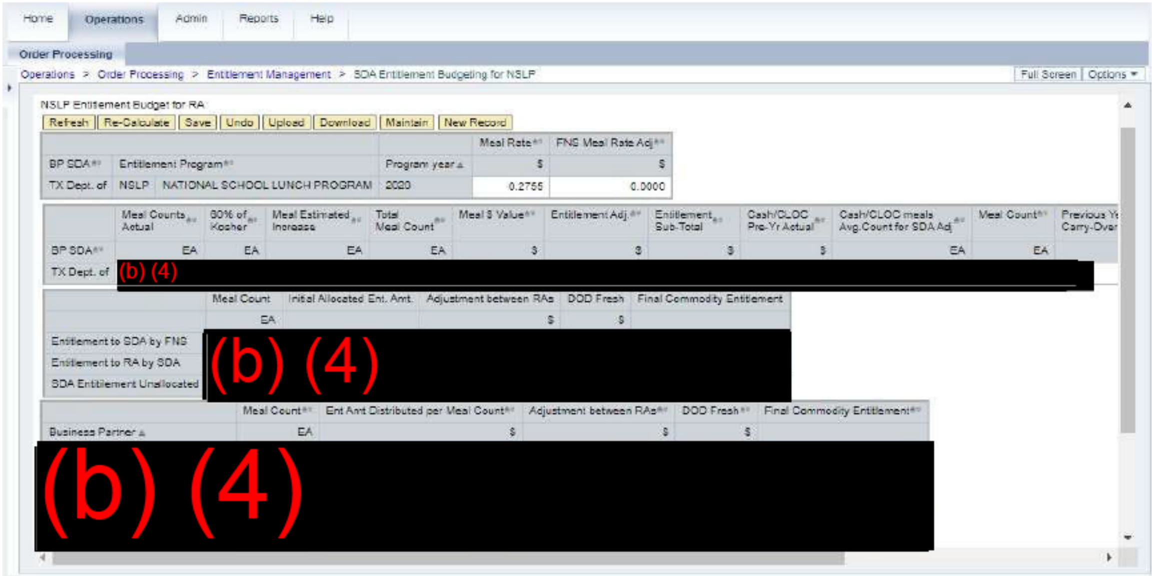
20. Click (the **Save** icon) to save the file locally once all data has been entered.

(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



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:

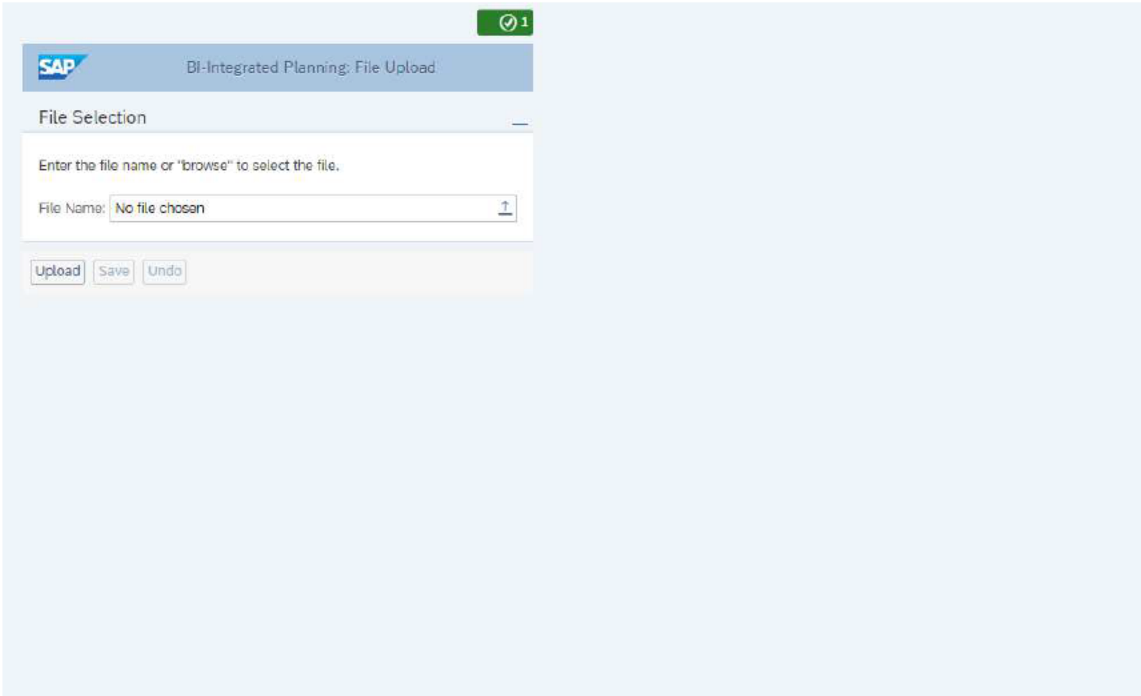
- Each entry must have a BP ID, program, year
- RA must be under the SDA
- RA must have the instance program assigned (via Organization Maintenance)

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.

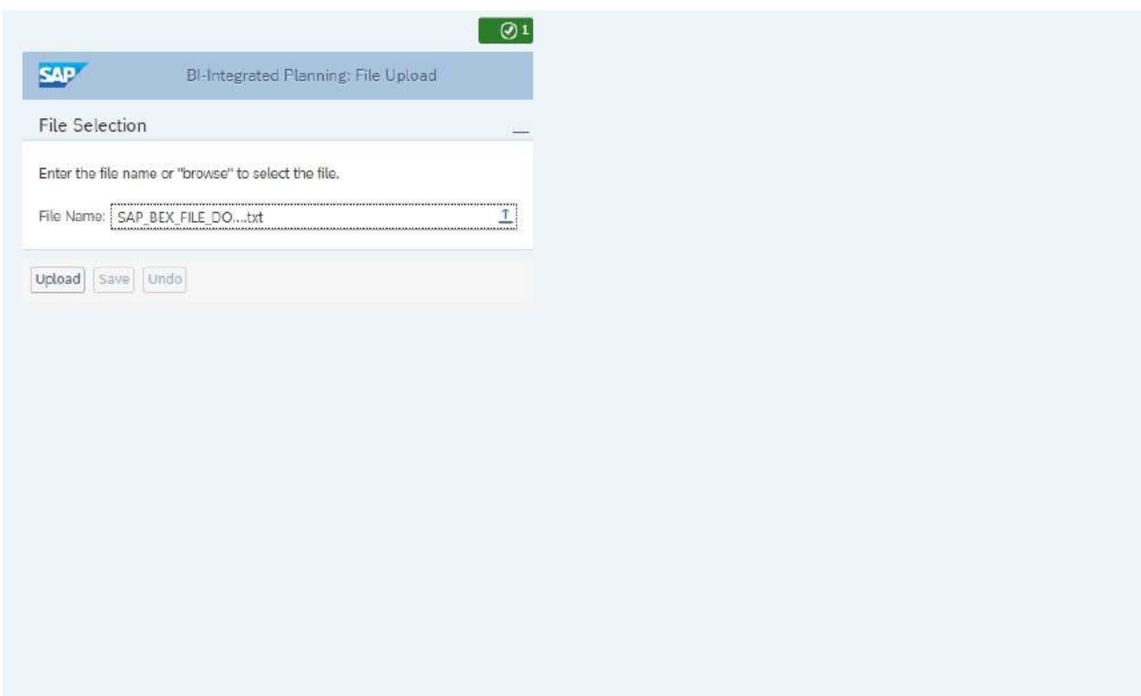
Image: BI-Integrated Planning: File Upload Screen



23. Click (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



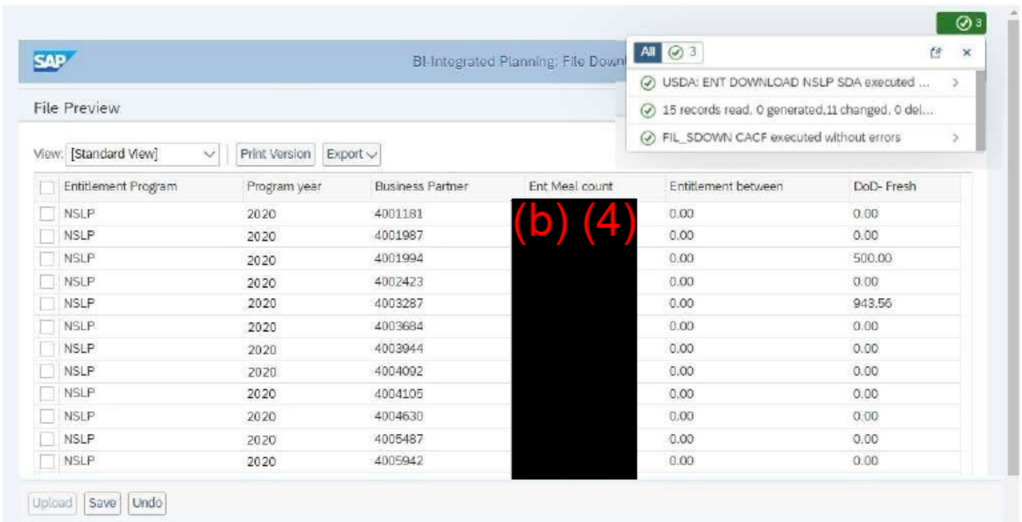
25. Click Upload (the **Upload** button).

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

26. Review the upload details.

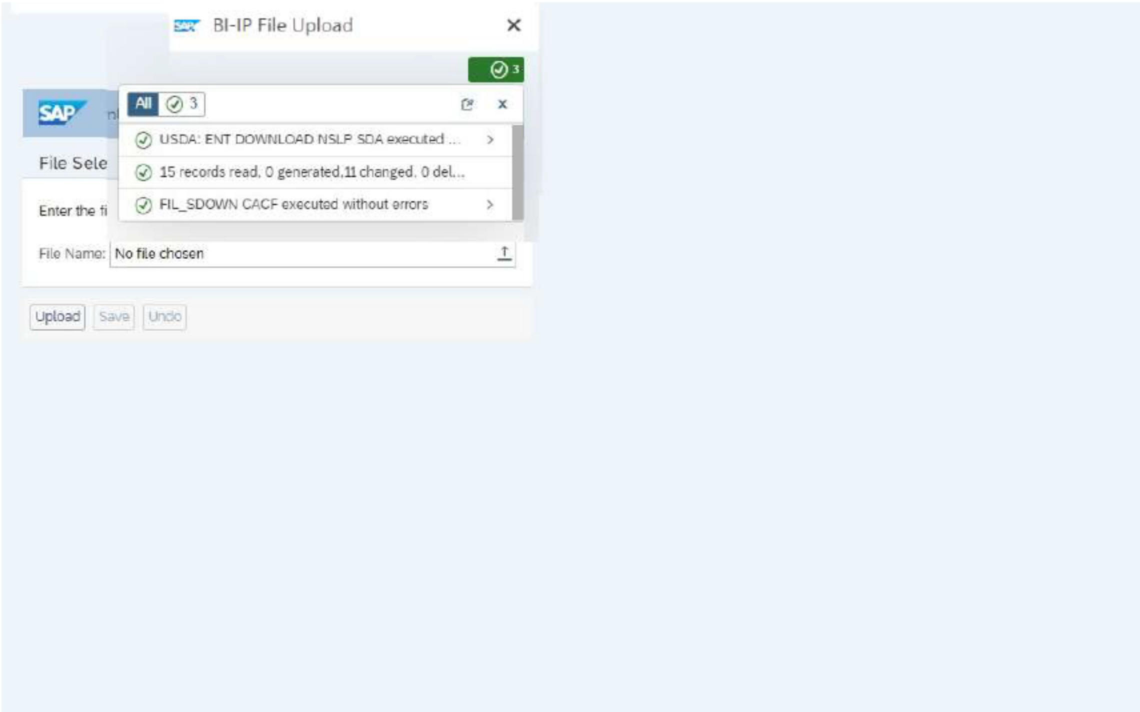
(Note) Review the messages at the top of this screen. If error messages appear, the upload did not occur. Correct the issue and return to Step 22 to attempt the upload again.

Image: BI-Integrated Planning: File Upload Screen



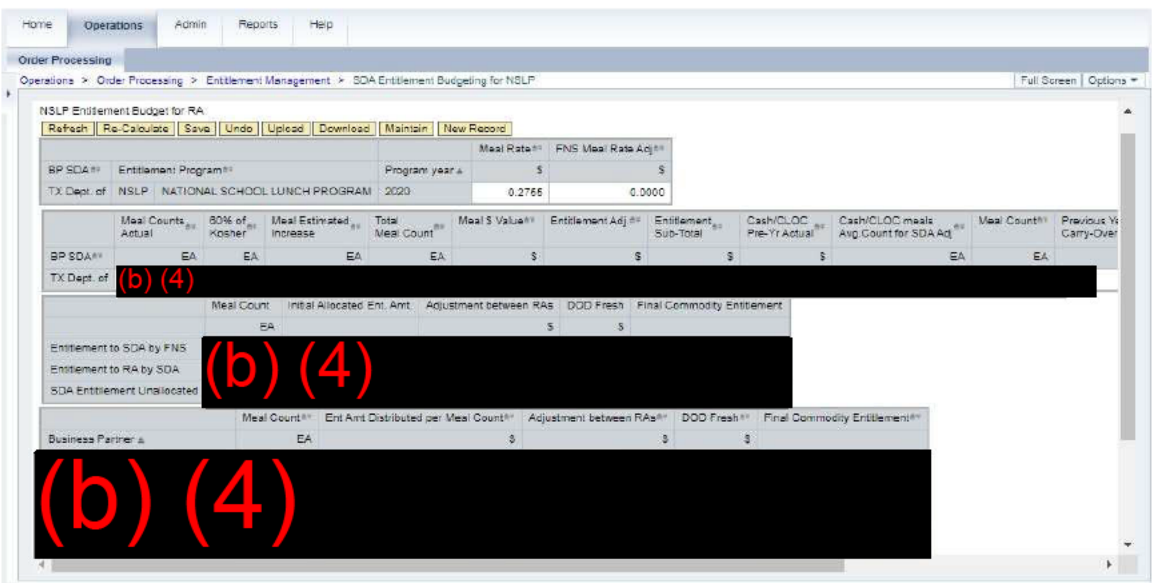
27. Click Save (the **Save** button).

Image: BI-Integrated Planning: File Upload Screen



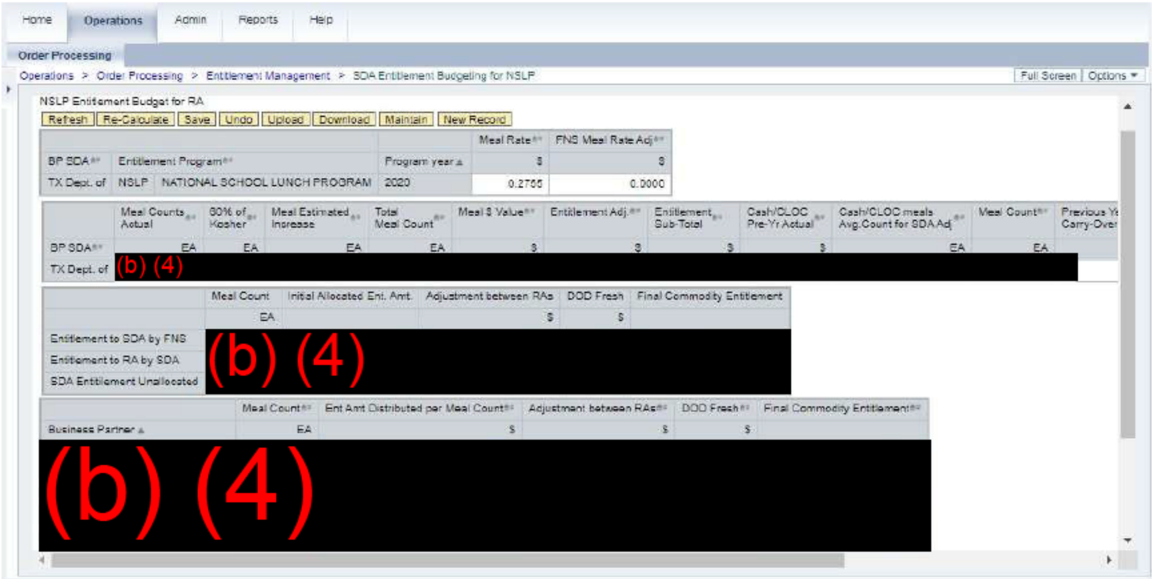
28. Click ✕ (the **Close** button).

Image: NSLP Entitlement Budget for RA Screen



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.

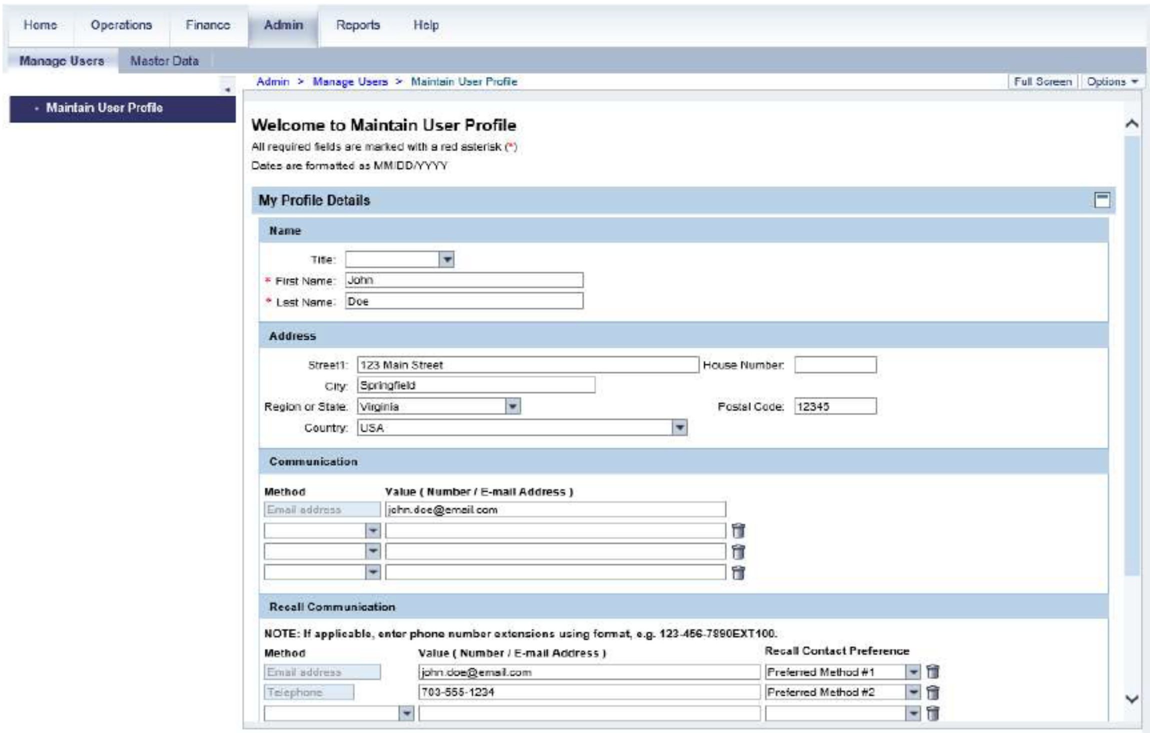
Tips and Tricks

- 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

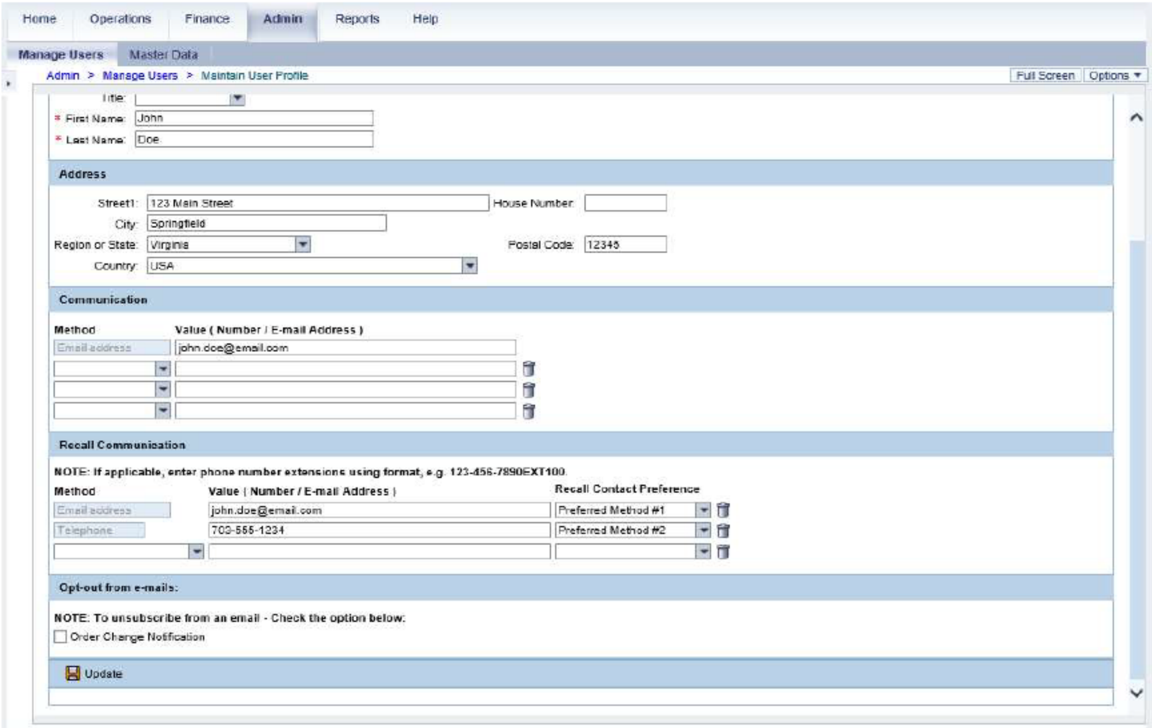


2. Click (the **Hide Navigator** arrow) to minimize the Portal menu. Note this can be done on any transaction in WBSCM.

(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 **Maintain User Profile** work instruction.

Image: Maintain User Profile Screen



3. Perform one of the following:

If	Then
The user needs to add a new recall communication method	1. In the **Method** field, choose the type of communication from the available list of options 2. 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	1. 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 (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.

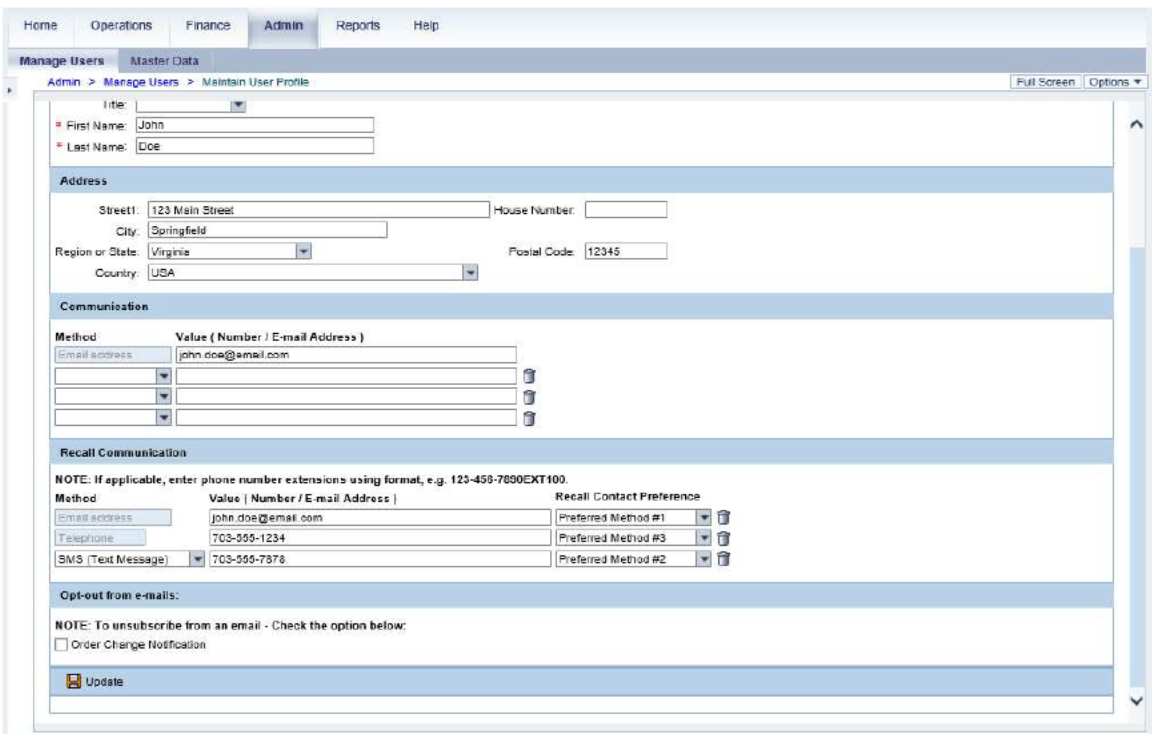
(Note) Available recall communication methods are **Email Address, Mobile Phone, SMS (Text Message),** and **Telephone.**

(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.

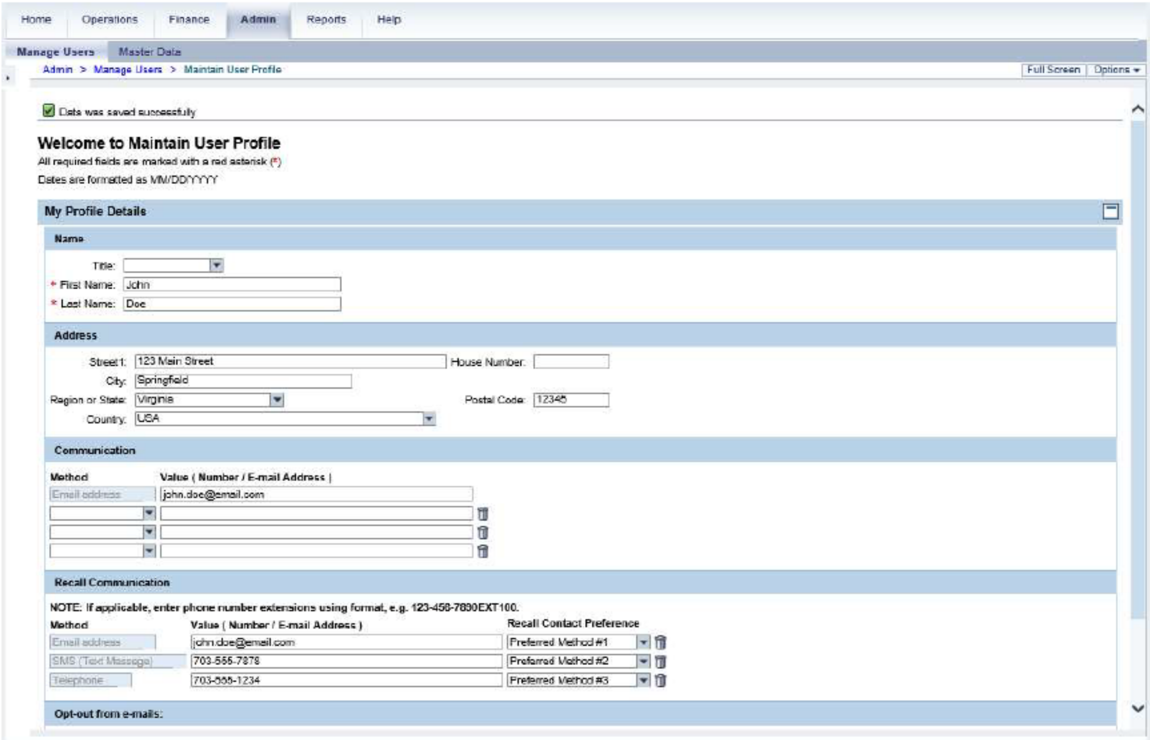
Image: Maintain User Profile Screen



4. Click Update (the **Update** button).

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

Image: Maintain User Profile Screen



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.

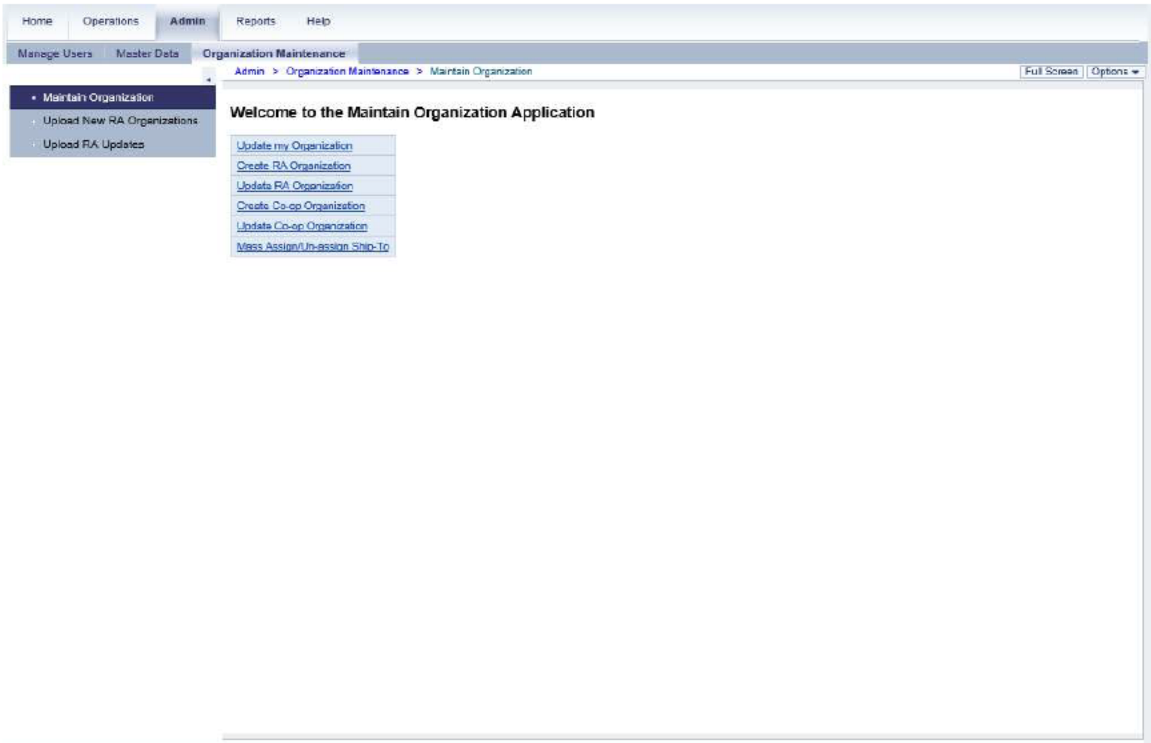
Tips and Tricks

- 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

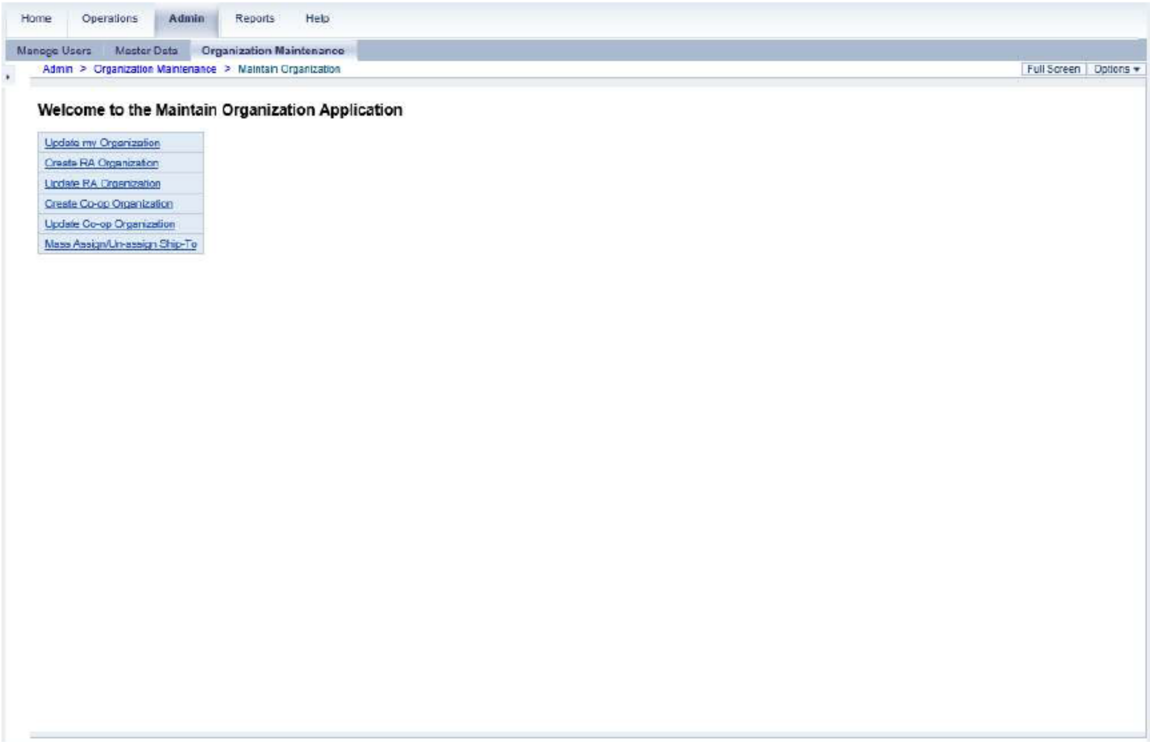
1. Start the transaction using the Portal path: **Admin** tab → **Organization Maintenance** folder → **Maintain Organization** link.

Image: Maintain Organization Screen



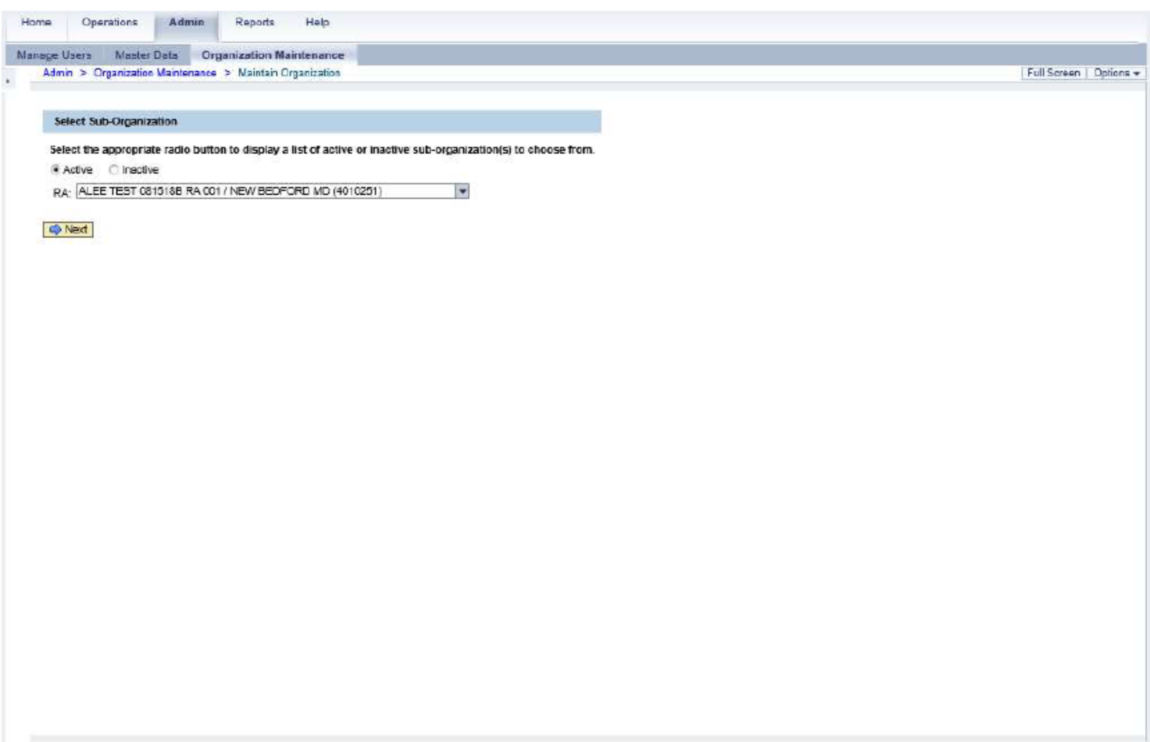
2. Click ◂ (the **Hide Navigator** button) to minimize the Portal menu. Note that this can be done with any transaction in WBSCM.

Image: Maintain Organization Screen



3. Click Update RA Organization (the **Update RA Organization** button).

Image: Select Sub-Organization Screen



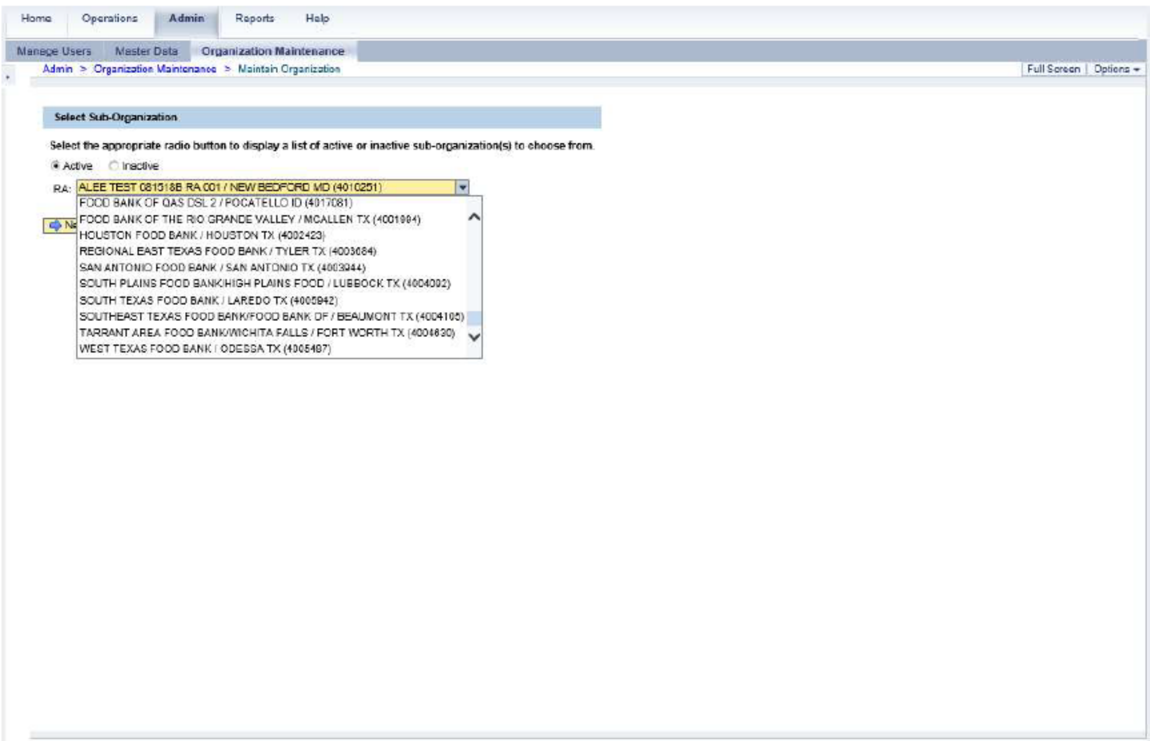
4. Click (the **RA** drop-down).

(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 (the **RA** drop-down).

Image: Select Sub-Organization Screen

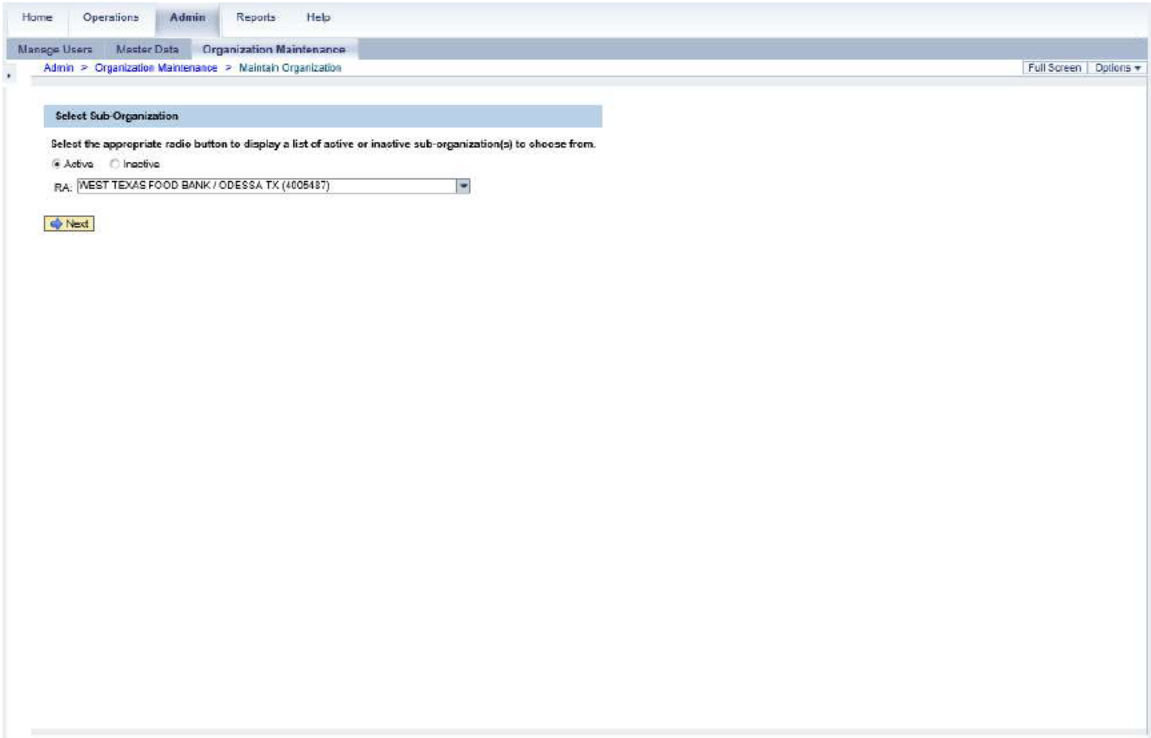


5. Select the appropriate RA from the list. In this example, WEST TEXAS FOOD BANK / ODESSA TX (4005487) (the **WEST TEXAS FOOD BANK / ODESSA TX (4005487)**) is selected.

(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

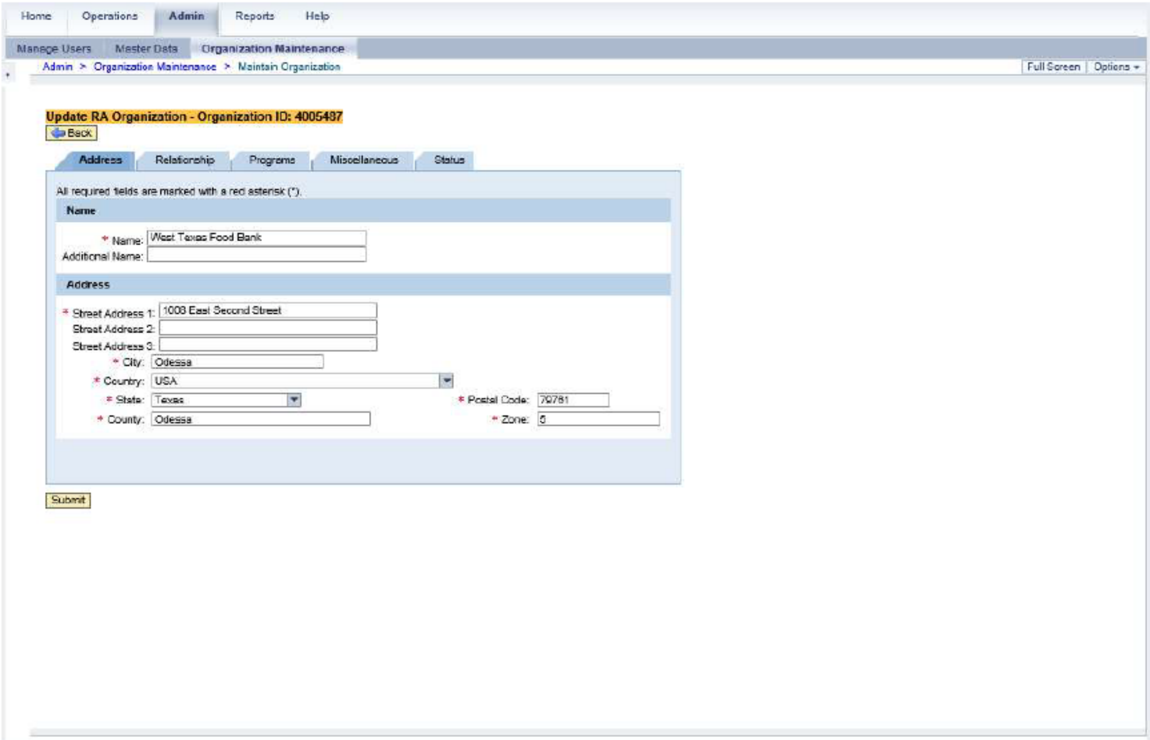


6. Click Next (the **Next** button).

7. Perform one of the following:

If	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

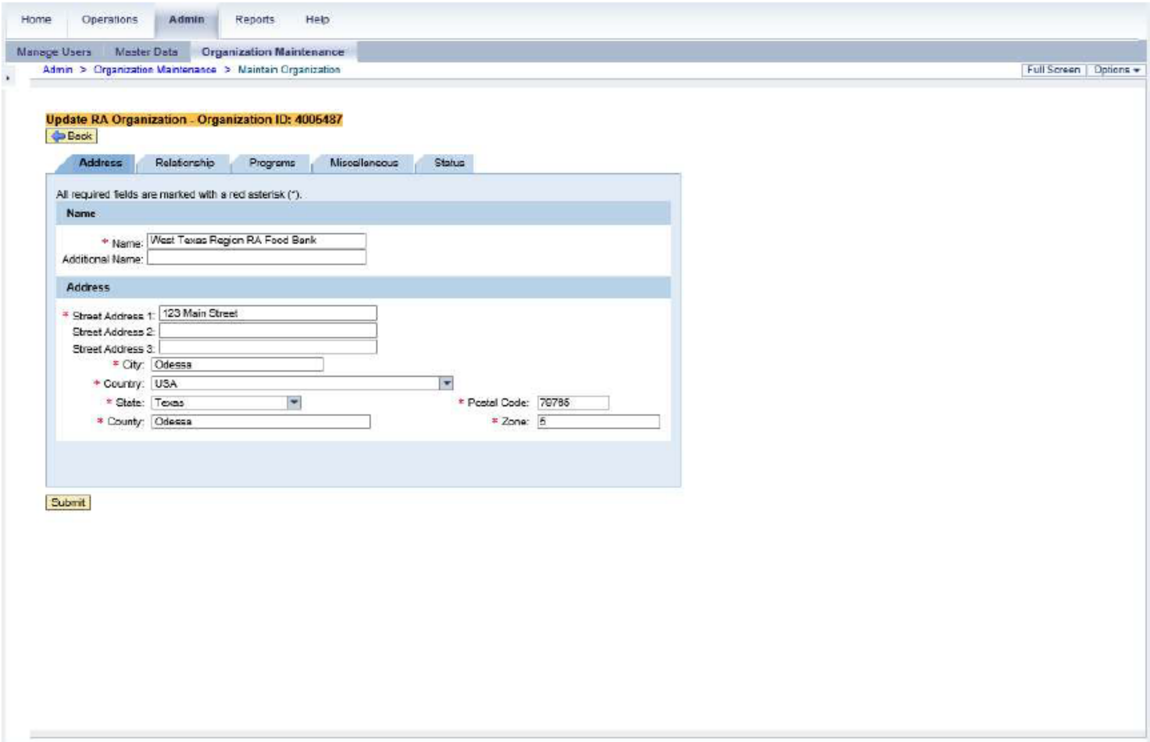


8. As required, complete/review the following fields:

Field	R/O/C	Description
Name:	R	Person or business partner's name. **Example:** West Texas Region RA Food Bank
Additional Name:	O	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:	O	A free text field in which to enter the street address of the user or organization.

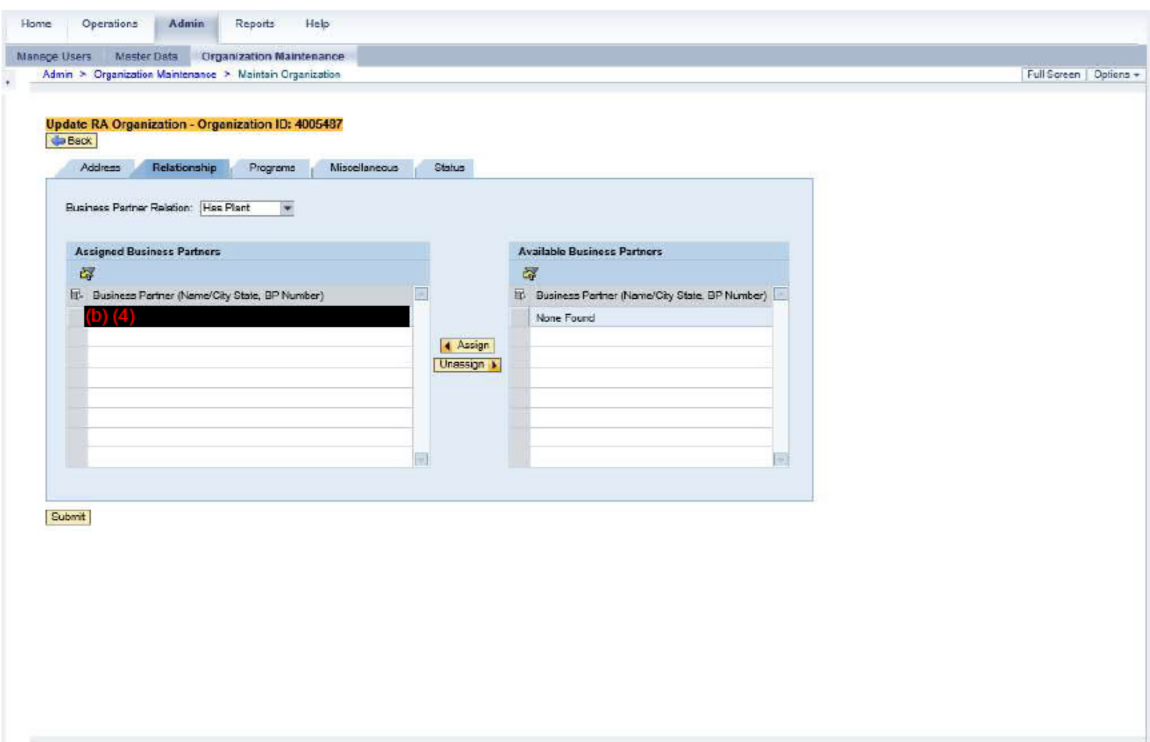
Field	R/O/C	Description
Street Address 3:	O	A free text field in which to enter the street address of the user or organization.
City:	R	City where the user or company is located. **Example:** Odessa
Country:	R	Country code that represents country name. **Example:** USA (Note) The Country (**Drop-down** button) displays a list of countries.
State:	R	The abbreviation or name of United States territory, district or state. **Example:** Texas (Note) The State (**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

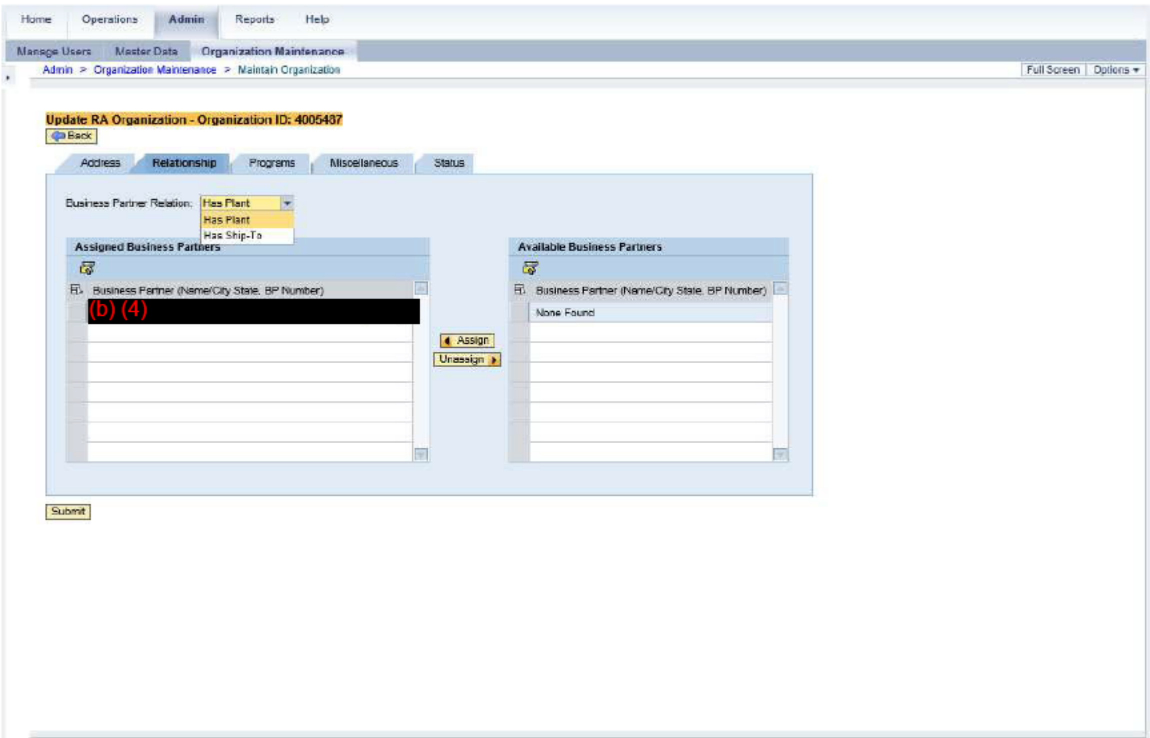


10. Click (the **Business Partner Relation** drop-down).

(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 receive ordered materials.

Image: Update RA Organization (Relationship) Screen



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:

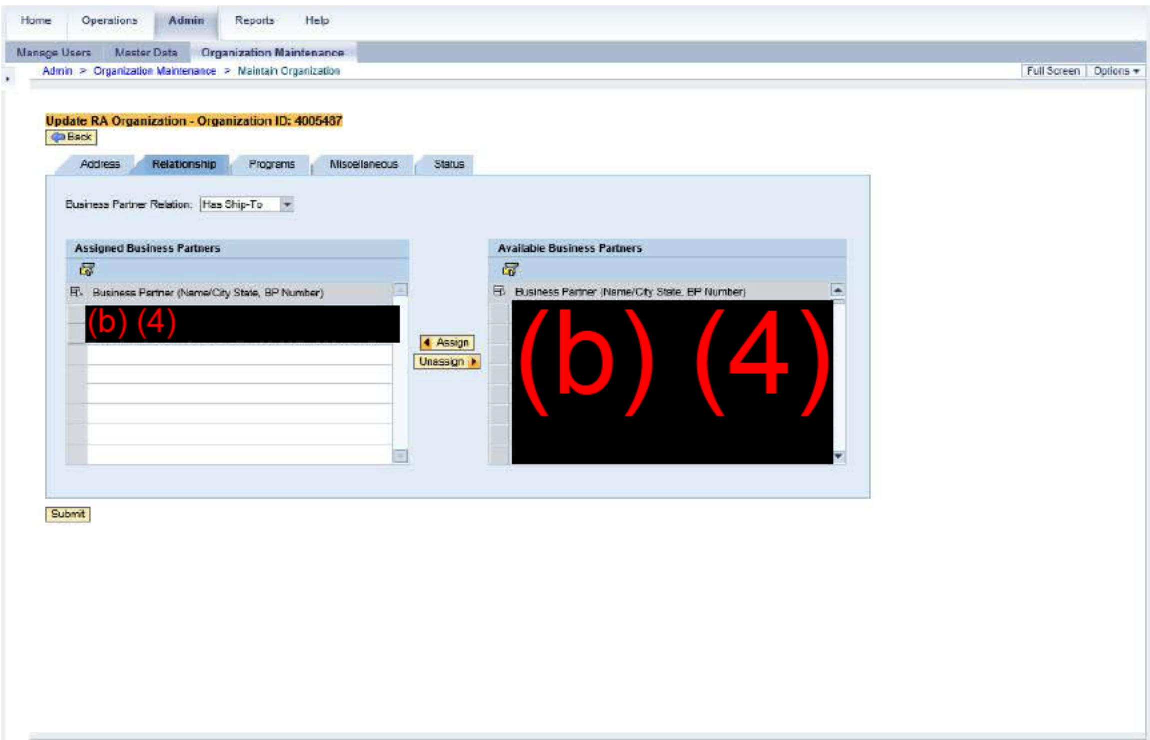
- If the business partners are listed in consecutive rows, hold down the **Shift** key and click the first and last select buttons.
- If the business partners are listed in non-consecutive rows, hold down the Ctrl key while clicking each select button.

The multiple selection also applies to the **Programs** tab.

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

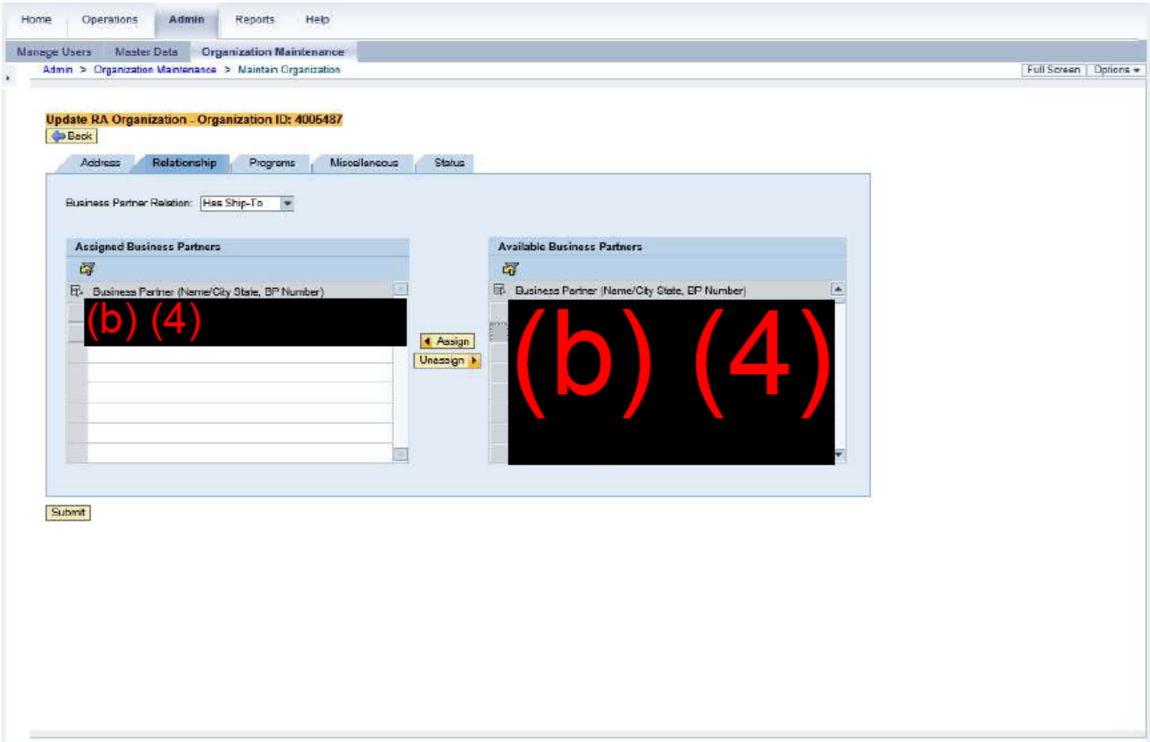
(Name/City State, BP Number) field. Select (User-Defined Filter...) (the **User-Defined Filter...** option) and enter required criteria. Use * (the **Asterisk** symbol) at the beginning and end of a search term (e.g., *Craven* or *5001716*) to search for a Business Partner that contains the term. The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

Image: Update RA Organization (Relationship) Screen



12. Click (the **Select** button) to assign a Business Partner under the *Available Business Partners* section. In this example, the Business Partner [redacted] is selected.

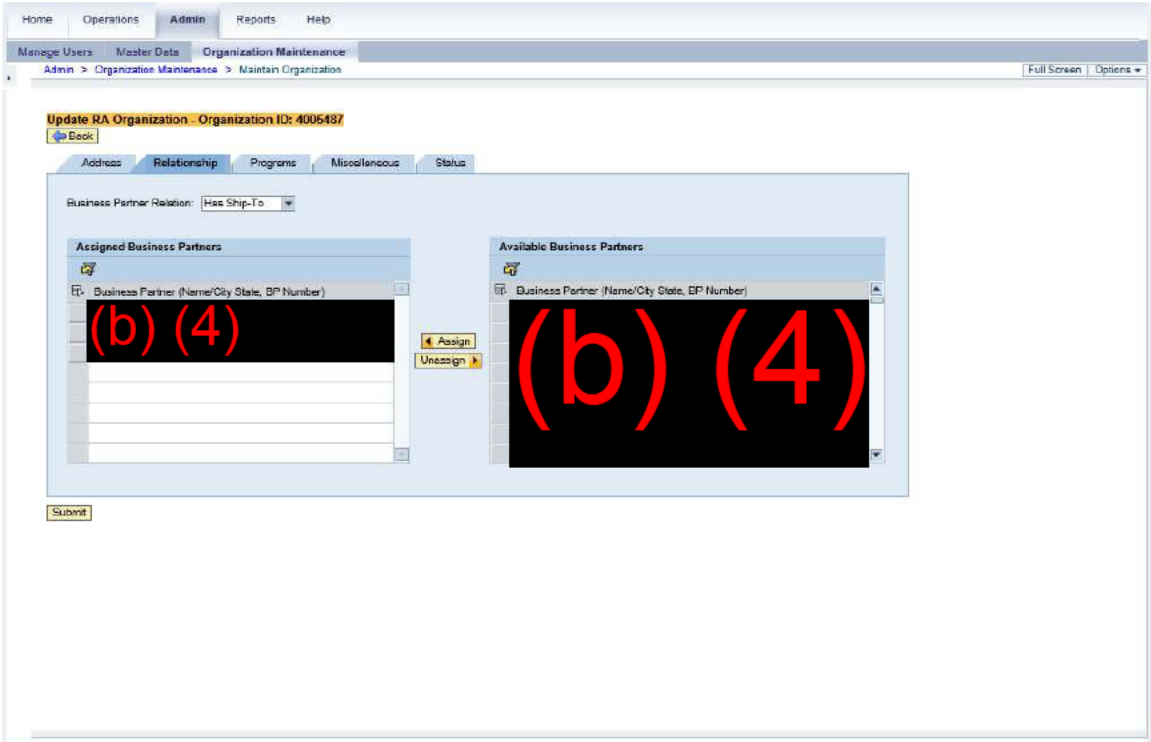
Image: Update RA Organization (Relationship) Screen



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 Unassign (the **Unassign** button).

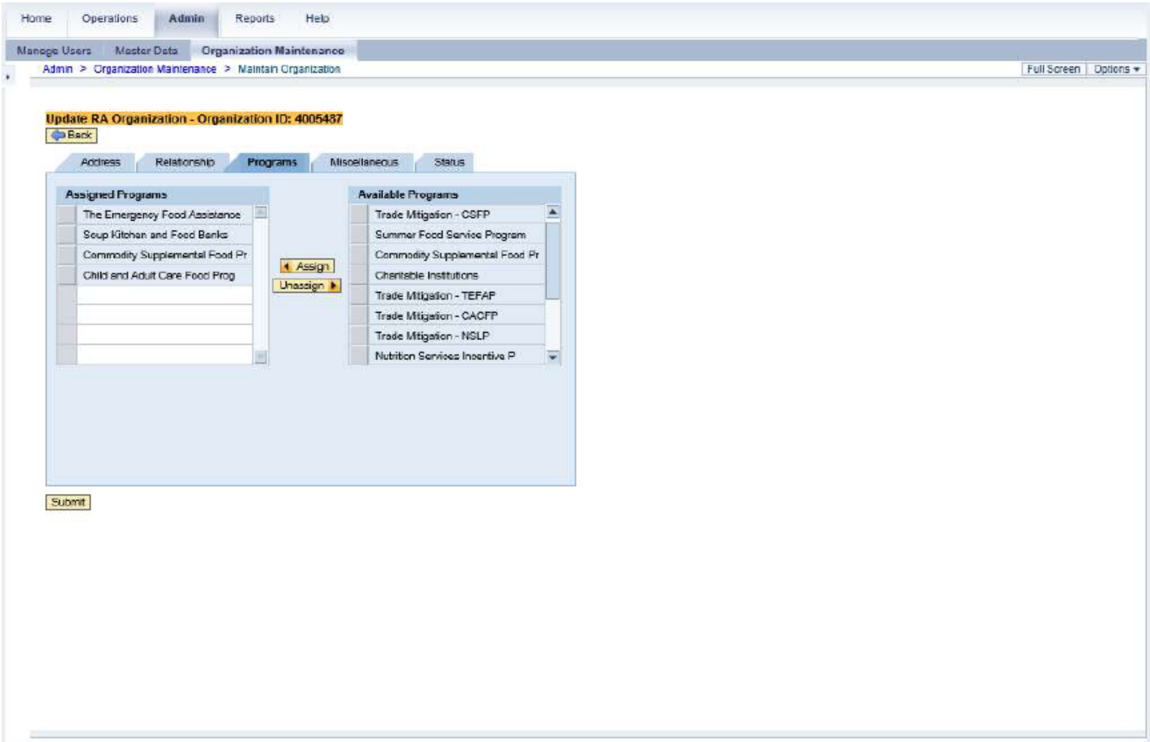
Image: Update RA Organization (Relationship) Screen



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

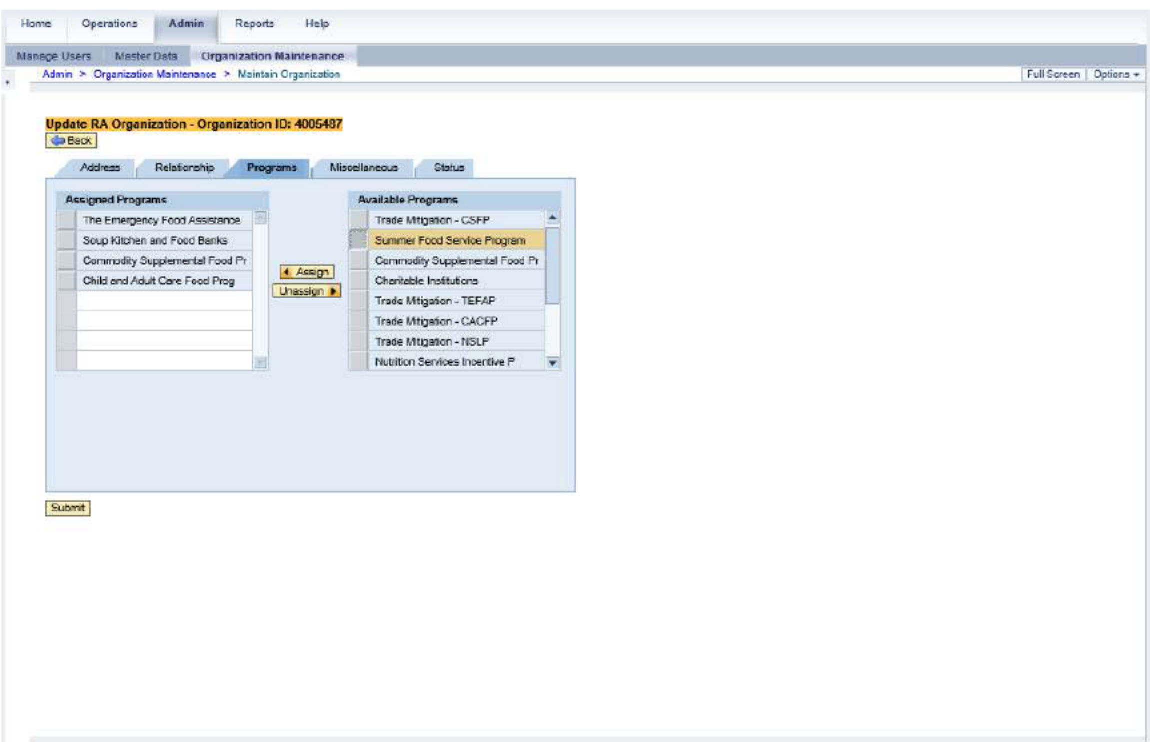
(Note) Only programs that have been assigned to the user's SDA by FNS will display.

Image: Update RA Organization (Programs) Screen



15. Click (the **Select** button) to select the Program under the *Available Programs* section. In this example, the **Summer Food Service Program** is selected.

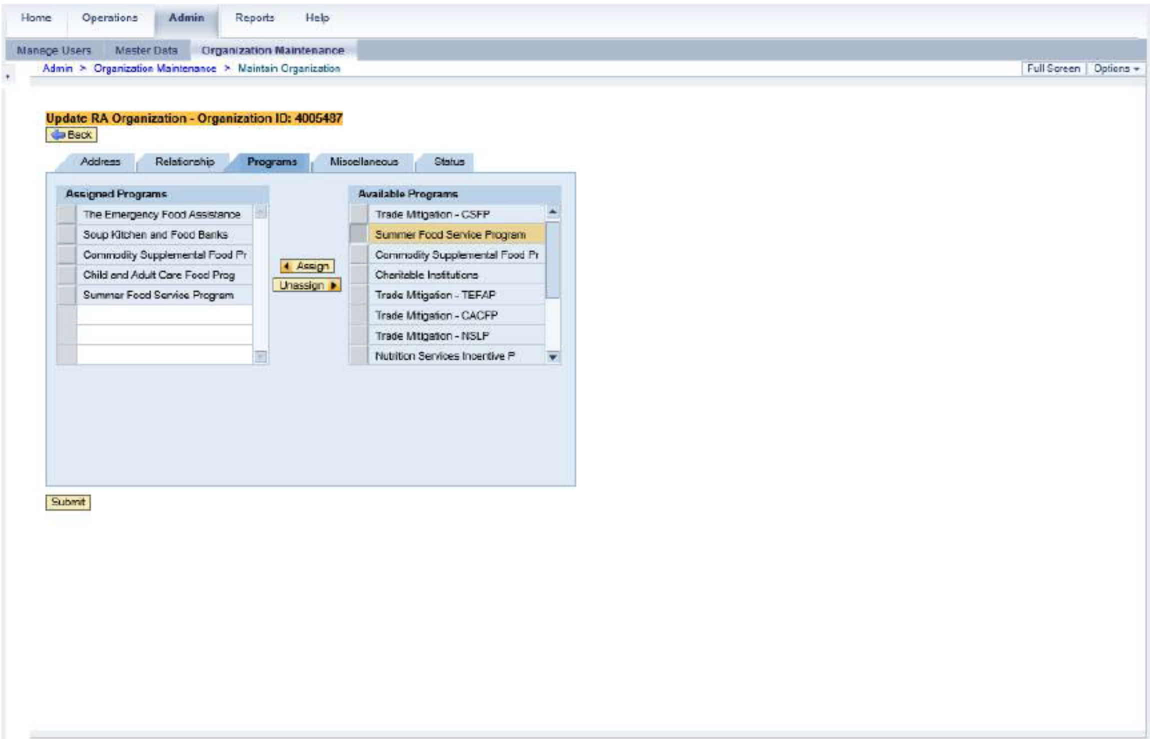
Image: Update RA Organization (Programs) Screen



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

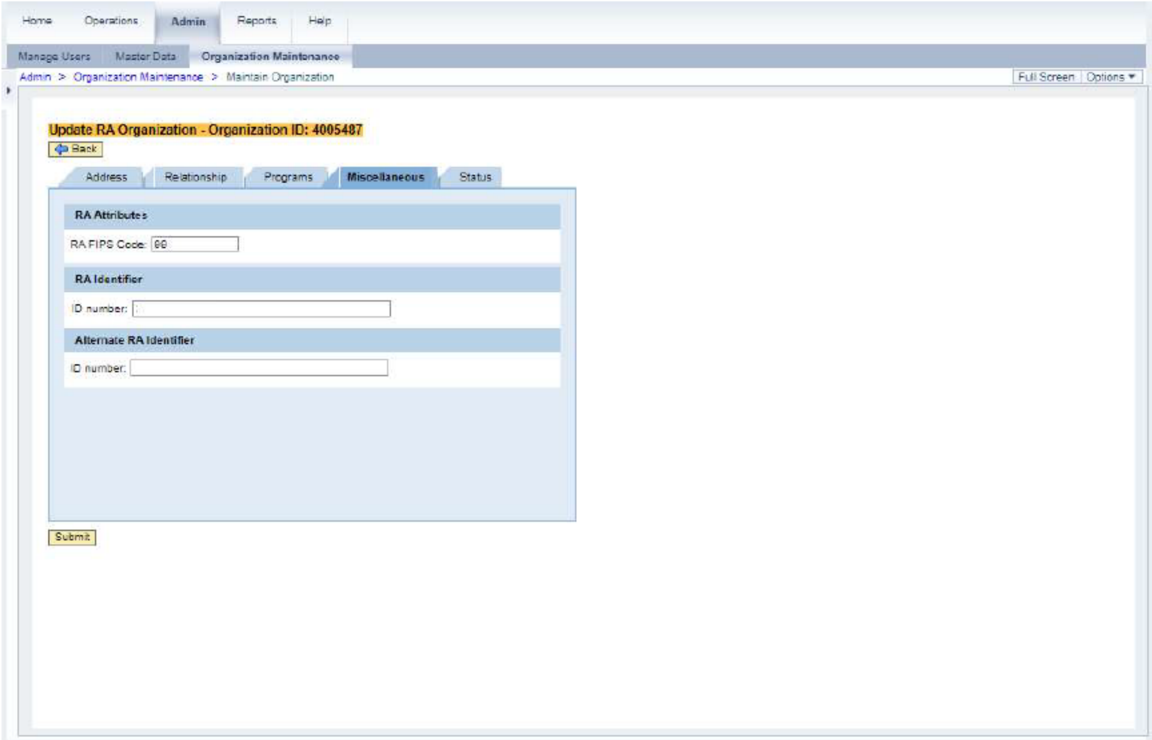
(Note) To unassign programs, click (the **Select** button) to select the program from the *Assigned Programs* section, and then click (the **Unassign** button).

Image: Update RA Organization (Programs) Screen



17. Click (the **Miscellaneous** tab) to enter information, such as identifiers, for the RA.

Image: Update RA Organization (Miscellaneous) Screen

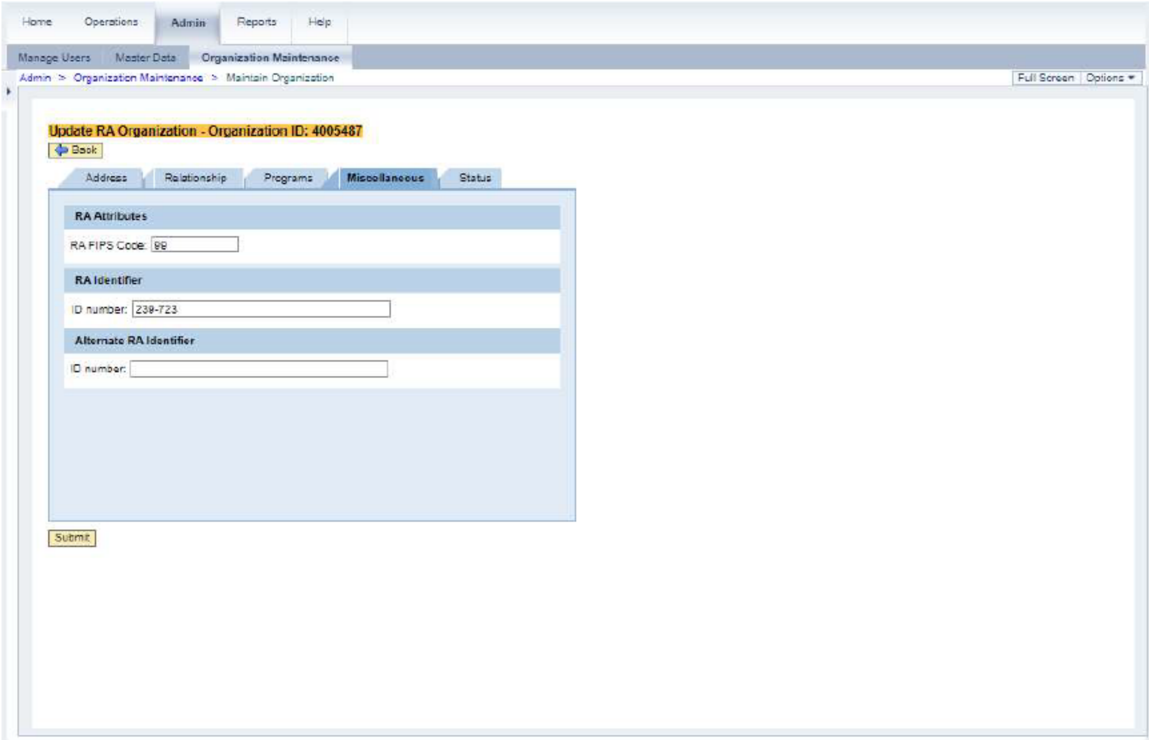


18. As required, complete/review the following fields:

Field	R/O/C	Description
RA FIPS Code:	O	A unique code that is assigned to the recipient agency by the Federal government. **Example:** 239-723
ID number: (RA Identifier)	O	Identification number that SDAs use to identify the RAs in other systems. **Example:** 239-723
ID number: (Alternate RA Identifier)	O	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.

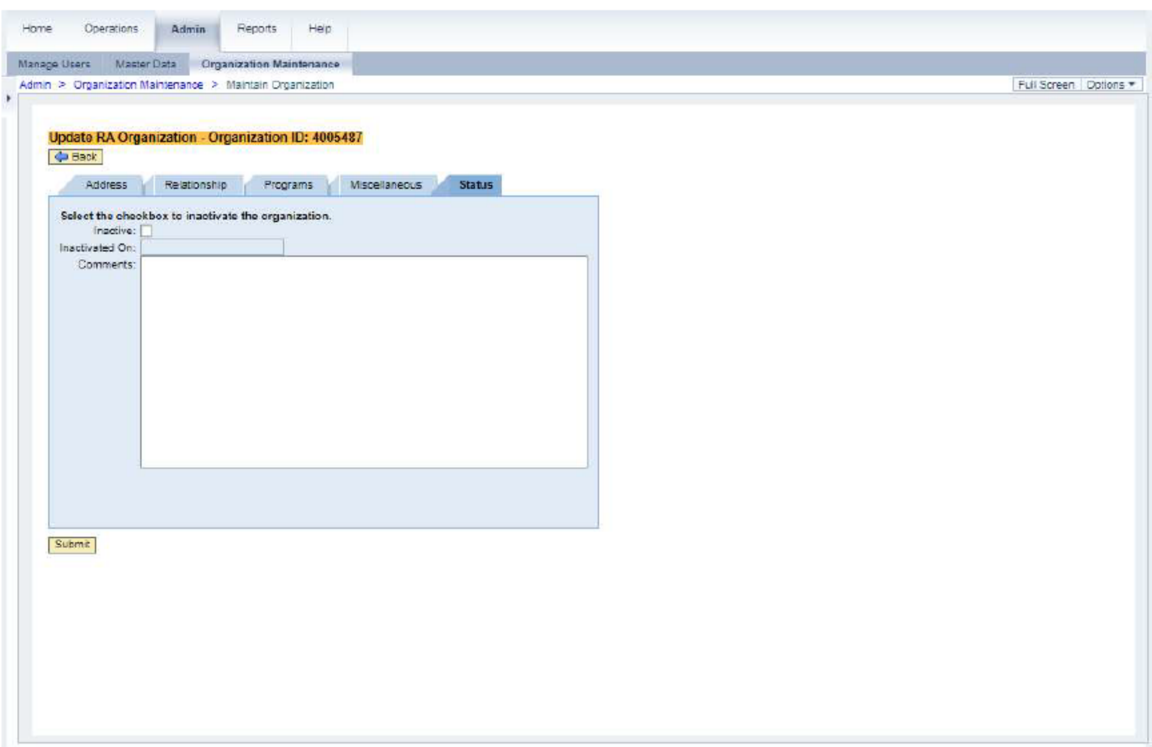
19. Return to Step 7.

Image: Update RA Organization (Miscellaneous) Screen



20. If necessary, click Status (the **Status** tab) to change the status of the RA.

Image: Update RA Organization (Status) Screen



21. Click ☐ (the **Inactive** checkbox) to change the status of the RA.

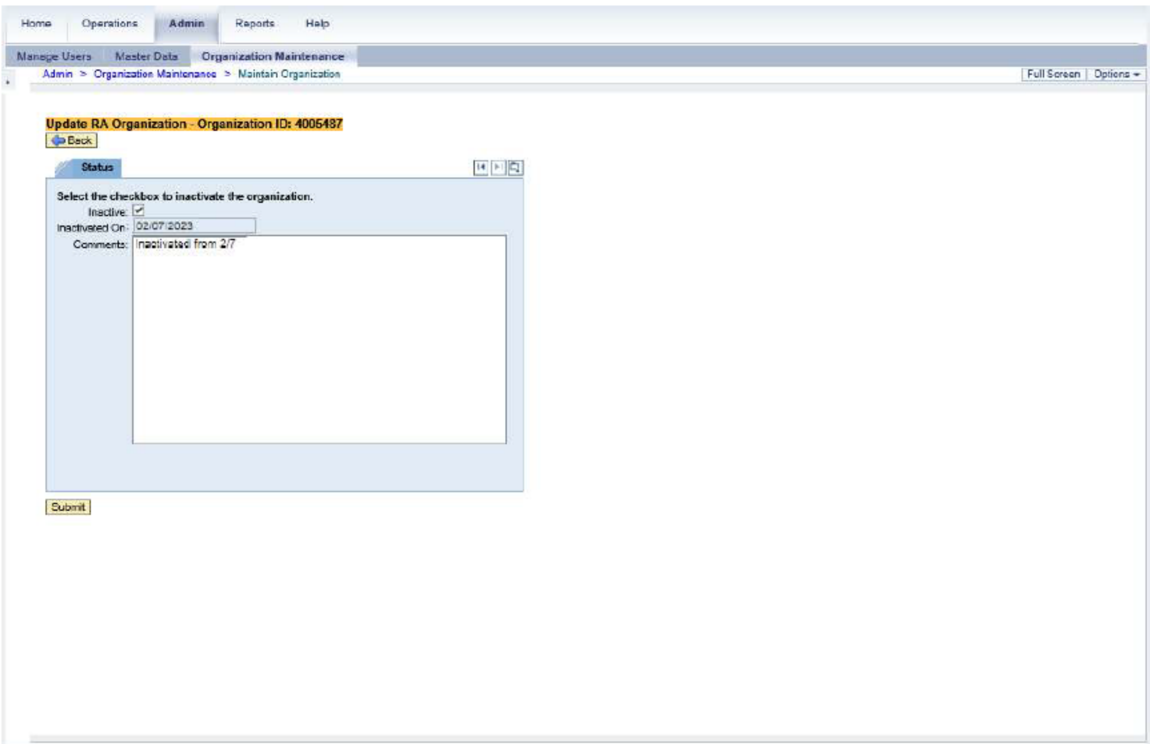
(Note) If ☐ (the **Inactive** checkbox) is selected, deselecting will make the RA active. Also, the date from the **Inactivated On** field will be cleared automatically, as the organization is no longer inactive.

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.

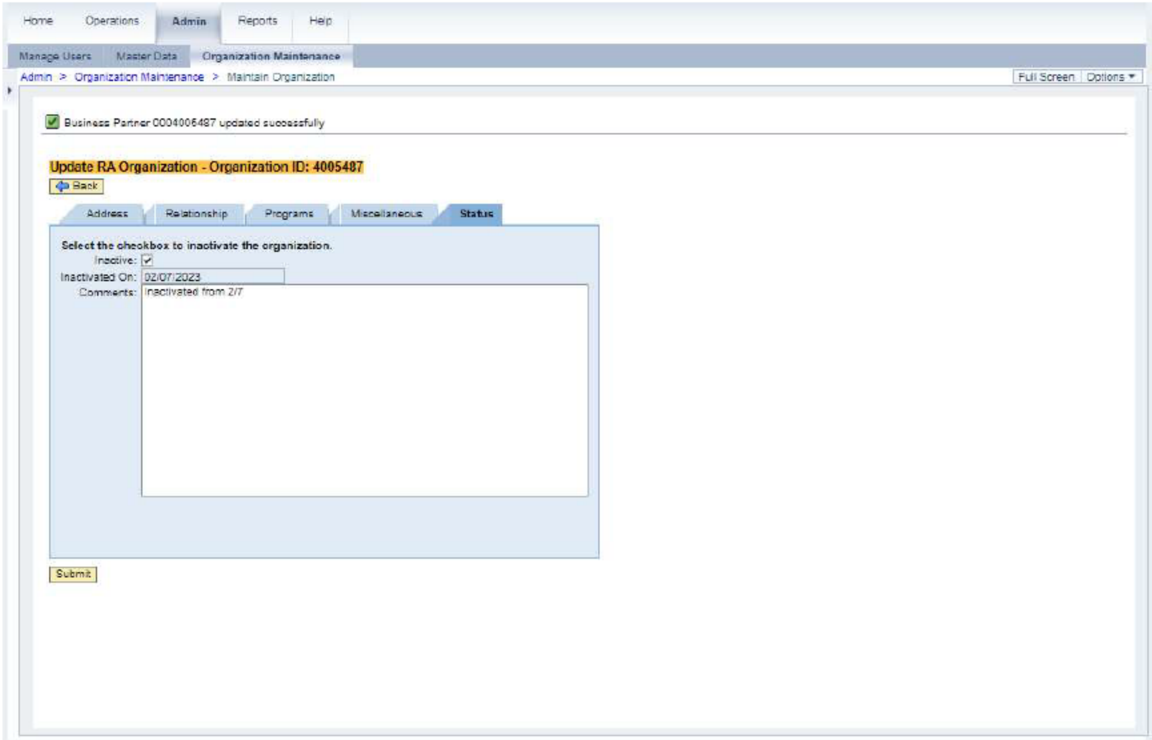
Image: Update RA Organization (Status) Screen



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.