

## Food Service Directors User Role for EdFusion

### Overview

Vermont Agency of Education Child Nutrition Programs has been working with AOE's Data Team to create a new Food Service Directors User Role for EdFusion. This user role will allow Food Service Directors to run the Direct Certification for Free and Reduced Lunch reporting group.

We hope this new user role will improve ease of access to the Direct Cert information for Food Service Directors and simultaneously improve communication between Food Service Directors and Data Managers within an SU/SD.

### Background

The DC #03 Unofficial Enrollment is the enrollment list that Data Managers upload monthly in EdFusion from which the Direct Certification reporting group gets matched. **The Direct Certification for Free and Reduced Lunch Report will only be as accurate as the most recently uploaded DC #03 Unofficial Enrollment.** Only Data Managers have the ability to upload an updated DC # 03 Unofficial Enrollment. Food Service Directors should communicate with the Data Manager in their SU/SD in order to be sure that the enrollment is up to date monthly, and when any new student enrolls. AOE Child Nutrition Programs and Data Team will continue to communicate to Business Managers, Food Service Directors, and Data Managers through their respective ListServes about when the monthly Direct Certification information has been updated. If you are unsure who the Data Manager is in your SU/SD is, please contact your administrative office.

### Access for New Users

Food Service Directors must connect with Data Managers in their SU/SD in order to request user access to this new Food Service Director User Roll in EdFusion. Data Managers will then contact the AOE SLDS Support Group to request access on behalf of the Food Service Director.

Once the request is received, SLDS Support Group will send Food Service Directors an email with login information to access EdFusion.

When users receive the email with their username and temporary password, they should navigate to the [EdFusion login page](#) in order to change their password and begin accessing the site.

### Create a Direct Certification Reporting Group

Before running a report be sure to remember: **the Direct Certification for Free and Reduced Lunch Report will only be as accurate as the most recently uploaded DC #03 Unofficial**



**Enrollment.** Check with your data manager that the DC #03 is up to date before running this report. Additionally, a quick edit check could be performed by comparing your total monthly enrollment number against the number of students listed in the Direct Certification for Free and Reduced Lunch Report. For example, if you know that there are 1,705 students currently enrolled in your SU/SD but the report only shows you 1,696 students this may be an indicator the DC #03 is not up-to-date.

**To create a reporting group:**

1. From the landing page, hover over the “Insight” tab in the top left corner.
2. Select “Reporting Group” from the options that appear.
3. You will not be able to customize the first row, entitled “Selection Criteria.” This is preselected to *Source: Analysis Data Mart, Reporting Group: Direct Certification for Free and Reduced Lunch*, and *Columns: all selected*. Under “Filter Criteria” choose the most current year as your School Year and select your LEA ID as the Submitting Org.
4. Underneath the “Information” section, and to the right, click “Create.”
5. Wait a few moments for the request to process before scrolling down to “Export History” to view the report.
6. Click “Download” to view the file of the reporting group.

**Reading the Direct Certification List**

Once you run the Direct Certification for Free and Reduced Lunch reporting group and export the file to excel, you will be looking at a list of *every student who is currently enrolled in your SU/SD* along with their identifying information and relevant Direct Certification information. Put another way, this is a list of Directly Certified children *and* not-Directly Certified children.

**Column Headers**

Column headers of the report are defined below:

SY	School Year; school year 2021-2022 is denoted as ‘2022’
ENRORGID	School ID Number
ORGNAME	School Name
ADMINID	LEA ID Number
LCLSTUNUM	School/LEA’s Internal Student ID Number
PERMNUMBER	State-Issued Student ID Number
FNAME	Student First Name
MNAME	Middle Name
LNAME	Last Name
POSTNAME	Post Name
DOB	Date of Birth
GRADE	Grade; KF = Kindergarten, PK = Pre-K, AW = Adult Without Diploma, EE = Essential Early Education (Pre-K)

DCERT_TANF_RUFA_REACHUP	YES or NO, Directly Certified through ReachUp (known nationally as TANF, previously referred to as RUFA)
DCERT_SNAP_3SQUARESVT	YES or NO, Directly Certified through 3SquaresVT (known nationally as SNAP)
DCERT_OTHER	This column is blank. It is currently a placeholder for a possible future Direct Certification Reporting Group category.
DCERT_STATEPLACEDFOSTER	Every student should be listed as "NO" in this column, at this time. We are working on adding State Place Foster as a Direct Certification Reporting Group, but it is not yet live.

## Formatting the File

When you first open your downloaded file in excel it will look similar to the below screenshot. Some columns may show the symbol '#' where the column is not wide enough to display all of the data (circled in red, below). Where that is the case, you must expand the column to see the full set of data.

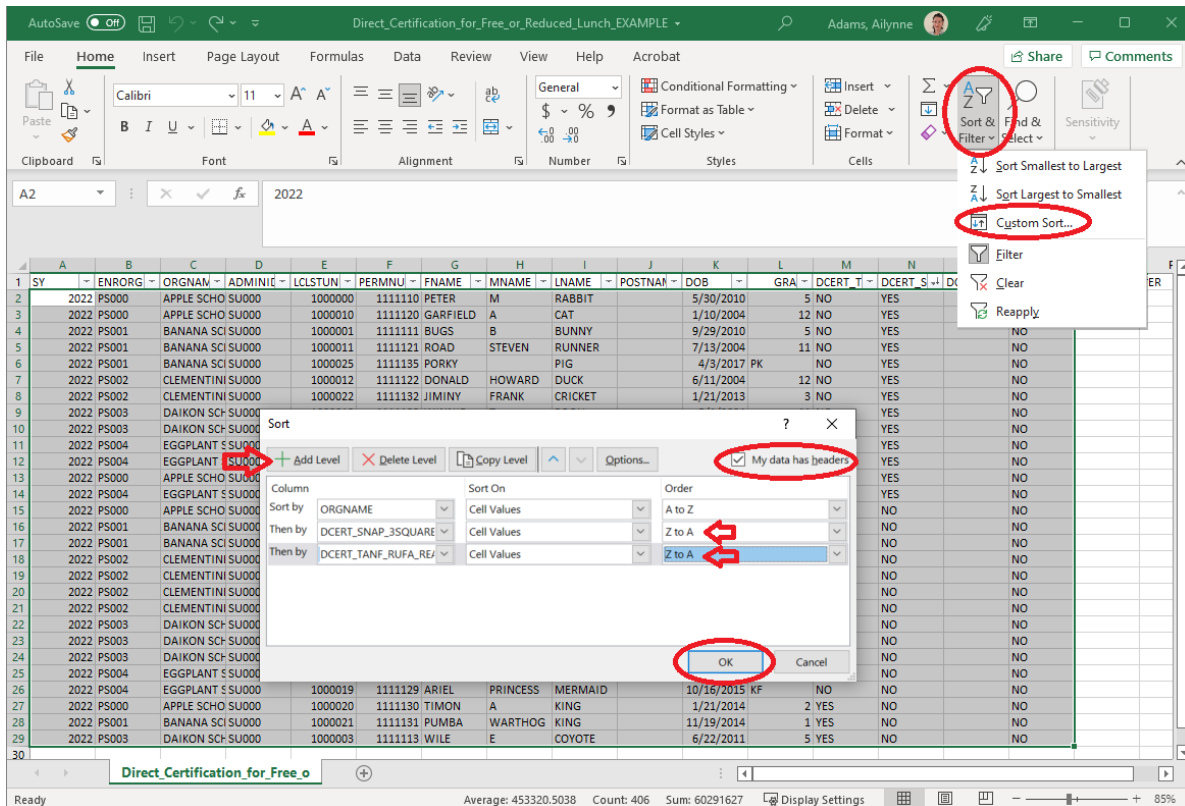
Since this is a list of every single student currently enrolled in your SU/SD, you must sort the list if you want to view only the students who are directly certified (have a YES in either the ReachUp or 3SquaresVT columns).

To sort the data, select the entire sheet using the triangle in the leftmost corner of the sheet. Then click the "Sort & Filter" button in the top ribbon and select "Filter." These buttons are circled in purple in the below screenshot. Selecting the Filter option will result in the addition of dropdown arrows on each of the column headers. Click the dropdown button to sort the column by any of the header categories.

The screenshot shows the Excel interface with the following data visible in the spreadsheet:

ENRORGID	ORNAME	ADMINID	LCLSTUNUM	PERMNUM	FNAME	MNAME	LNAME	POSTNAME	DOB	GRADE	DCERT_TAN	DCERT_SNA	DCERT_OTH	DCERT_STATEF
2022 PS000	APPLE SCHC SU000	1000000	1111110	PETER	M	RABBIT			5/30/2010	5	NO	YES		NO
2022 PS000	APPLE SCHC SU000	1000005	1111115	FELIX	THE	CAT			1/28/2003	12	NO	NO		NO
2022 PS000	APPLE SCHC SU000	1000010	1111120	GARFIELD	A	CAT			1/10/2004	12	NO	YES		NO
2022 PS000	APPLE SCHC SU000	1000015	1111125	YOGI	TED	BEAR			3/27/2004	12	YES	YES		NO
2022 PS000	APPLE SCHC SU000	1000020	1111130	TIMON	A	KING			1/21/2014	2	YES	NO		NO
2022 PS001	BANANA SC SU000	1000001	1111111	BUGS	B	BUNNY			9/29/2010	5	NO	YES		NO
2022 PS001	BANANA SC SU000	1000006	1111116	TOM	AND	JERRY			12/1/2004	11	NO	NO		NO
2022 PS001	BANANA SC SU000	1000011	1111121	ROAD	STEVEN	RUNNER			7/13/2004	11	NO	YES		NO
2022 PS001	BANANA SC SU000	1000016	1111126	DAFFY	D	DUCK			6/30/2014	2	NO	NO		NO
2022 PS001	BANANA SC SU000	1000021	1111131	PUMBA	WARHOG	KING			4/3/2017	1	YES	NO		NO
2022 PS001	BANANA SC SU000	1000025	1111135	PORKY		PIG			4/3/2017	PK	NO	YES		NO
2022 PS002	CLEMENTIN SU000	1000002	1111112	MICKY	DISNEY	MOUSE			#####	5	NO	NO		NO
2022 PS002	CLEMENTIN SU000	1000007	1111117	JERRY	N	TOM			2/14/2004	12	NO	NO		NO
2022 PS002	CLEMENTIN SU000	1000012	1111122	DONALD	HOWARD	DUCK			6/11/2004	12	NO	YES		NO
2022 PS002	CLEMENTIN SU000	1000017	1111127	SIMBA	LION	KING			#####	1	NO	NO		NO
2022 PS002	CLEMENTIN SU000	1000022	1111132	JIMINY	FRANK	CRICKET			1/21/2013	3	NO	YES		NO
2022 PS002	CLEMENTIN SU000	1000026	1111136	WOODY	THE	WOODPECKER			7/20/2017	EE	NO	NO		NO
2022 PS003	DAIKON SCI SU000	1000003	1111113	WILE	E	COYOTE			6/22/2011	5	YES	NO		NO
2022 PS003	DAIKON SCI SU000	1000008	1111118	SCOOBY	DOOBY	DOO			8/27/2004	12	NO	NO		NO
2022 PS003	DAIKON SCI SU000	1000013	1111123	WINNIE	T	POOH			5/1/2004	11	NO	YES		NO
2022 PS003	DAIKON SCI SU000	1000018	1111128	NALA	QUEEN	KING			8/30/2016	KF	NO	NO		NO
2022 PS003	DAIKON SCI SU000	1000023	1111133	MINNIE	M	MOUSE			4/23/2016	KF	NO	YES		NO
2022 PS003	DAIKON SCI SU000	1000027	1111137	GOOFOY	A	DOG			8/8/2001	AW	NO	NO		NO
2022 PS004	EGGPLANT SU000	1000004	1111114	PINK		PANTHER			2/1/2012	4	YES	YES		NO

To sort by multiple levels (e.g. Sort first by School, then within each School sort further by 3SquaresVT and again by ReachUp) select the “Sort & Filter” button in the upper ribbon, choose “Custom Sort.” Be sure “My data has headers” is selected in the upper right corner of the pop-out window before selecting your “Column,” “Sort on,” and “Order.” Click the green plus sign in the upper left corner of the pop-out window to “Add Level,” and when you’re finished click “OK.” Sort the 3SquaresVT and ReachUp columns in reverse alphabetical order (Z to A) to list the “YES” students first. See screenshot below as an example of how to sort your Direct Cert list. Key items are indicated.



## Interpreting the Data

The most important headers in this reporting group are those which indicate if a student is Directly Certified for free school meals, DCERT\_TANF\_RUFA\_REACHUP and DCERT\_SNAP\_3SQUARESVT. A “YES” in *either* of these columns indicates that the student in that row is Directly Certified. If a student has a “YES” in *both* the ReachUp and 3SquaresVT columns on the report, the 3SquaresVT classification takes precedence in categorizing the student in your eligibility lists or Point of Sale (POS) system.

## Data Background and Limitations

The Direct Certification list matches student ID numbers with enrollment data for ReachUp and 3SquaresVT that the VT Department for Children and Families (DCF) shares with the Agency of Education for use in determining Direct Certification. This data is not a complete list of all directly certified children. The definition of Direct Certification includes determinations of eligibility for free meals where the determining information comes directly from a state agency or other authority. Ways that children can be Directly Certified, in addition to being listed in

the Direct Cert Report, include if the child is homeless, enrolled in the Migrant Education Program, in state-placed foster, or runaway.

## **Protecting Personal Identifiable Information (PII)**

The information in the Direct Certification list is on a need-to-know basis and should never be shared with anyone that is not directly involved in the eligibility determination for school meals. This list should not be shared with inquiring parents, school staff, or any other inquiring part who is not a determining official or school food service program administrator. Take care not to email the Direct Cert list and save and view it only from your work computer.

## **Forgot Password Process**

Users who have login credentials for EdFusion must follow these steps to set a new password:

1. Go to the EdFusion login page.
2. Enter your username as it was initially established in the email from AOE SLDS Support Group.
3. Click on the "Forgot Password" link.
4. Enter your username and click "Retrieve Credentials."
5. A one-time temporary password will be sent to the email address associated with your account. Copy the password exactly as it appears in the email, without any additional spaces at the beginning or end.
6. Return to the EdFusion login page and follow the prompts to reset your password, pasting in the temporary password from your email and creating a new password.
7. You will then have an opportunity to review your security questions and either click "Update" to change your answers, or "Go Home" to navigate to the landing page.

## **Forgot Login Process**

8. Go to the EdFusion login page.
9. Click on the "Forgot Login" link.
10. Enter the email associated with your EdFusion account and click "Retrieve Credentials."
11. Your Username will be emailed to you, as well as a link to reset your Password.  
Please be sure to check your SPAM folder just in case the Password reset email was filtered out by your SPAM filter.

## **Accessing Help**

In the event you are unable to complete either of the Forgot Password or Forgot Login processes, or if you need technical assistance with EdFusion please contact the AOE SLDS Support Group at [AOE.SLDSSupportGroup@vermont.gov](mailto:AOE.SLDSSupportGroup@vermont.gov).