WISCONSIN
USDA FOODS
ORDERING SYSTEM INSTRUCTIONS

School Year 2022-23
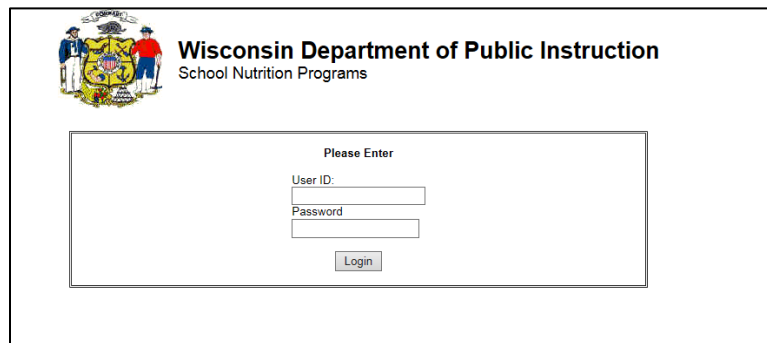

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I. Entering the WI USDA Foods Ordering System

1. Go to the USDA Foods Ordering System (https://wi.cnpus.com/fdp/login.aspx).

2. Enter your School Food Authority's (SFA) User ID and Password and click Login button.

3. **Welcome and Message Board:** Once you have entered the system, a Welcome and message board will be displayed. The message board may change on a weekly/monthly basis as necessary. Be sure to read the information displayed on this page.

   If you participate in NSLP and are expecting a USDA Foods delivery next month, be sure to click on the "Product Cancellations, Delays and Updates" link to review the status of specific USDA Foods products for the monthly orders.

   Click on the "Continue" button that is located below the message board information.

4. **Program Year Selection**: Select the program year by clicking on the desired program year. Program year is listed by the fiscal year. For example, if the desired school year is for the 2022-2023 school year, click on program year 2023.

5. **Program Selection:** If your agency participates in more than one type of USDA Foods Program [i.e. National School Lunch Program (NSLP), The Emergency Food Assistance Program (TEFAP), or the Summer Food Service Program (SFSP)], the system will default to the most recently used program. Be sure that under the Program section the system indicates the desired program.

6. If the system has defaulted to a different program, click on the word "Program" (located towards the upper right-hand corner of the *Wisconsin USDA Foods Ordering System* page).

7. This will be a list of USDA Foods Program(s) that your agency currently participates in. Click on the initials of the desired program. For example, the desired program is the National School Lunch Program. Click on the initials "NSLP." The system will now change to the desired program.

FDP Program Selection	
Program	Program Description
NSLP	NSLP
SFSP	SFSP
TEFAP	TEFAP
CACFP	CACFP

II. Contract Application and Delivery Location Forms

1. **School Food Authority Summary:** Once you have selected the desired program year, the School Food Authority Summary screen will display. Your school specific information can be found on this summary screen. The summary screen is set up in a tabular format. Each of the tabs contains school specific information. (The tab choices as listed below are: Applications, Entitlement, Surveys, Allocations, Inventory, Orders, and Invoicing).

2. To start participating in the USDA Foods Program, your agency must first review and enter information on the School Food Authority Contract Form and the Delivery Location Form. If your agency does not verify and submit the information contained on the School Food Authority Contract Form and Delivery Location Form, your agency will not be able to order and receive USDA Foods.

3. **Applications Tab:** To review and update the School Food Authority Contract Form, click on the "Edit" button on the right.

4. Review and update the information listed on the "School Food Authority Contract Form." Be sure to keep contact information updated throughout the school year whenever necessary.

   Primary and Alternate Contacts: The Primary contact will receive emails from the DPI USDA Foods Team, and the Alternate will be contacted when the Primary contact cannot be reached. Be sure to list at least two different staff.

```
FDP                                          Wisconsin Department of Public Instruction
School Food Authority Contract Form                              Program: NSLP
Test Agency                                              2019-2020 Program Year
(139999)                                                    Pending Submission
                                                                 Revision 0
↓ Bottom of Form

Mailing Address                    Street Address (if different than Mailing Address)

(1) Addr1:   PO Box 7841                    (6) Addr1:
(2) Addr2:                                  (7) Addr2:
(3) City:    Madison                        (8) City:
(4) State:   WI ∨   (5) Zip Code: 53707-7841 (9) State:   WI ∨   (10) Zip Code:

FDP Primary Contact                         FDP Alternate Contact (if Applicable)
              First    MI    Last                         First    MI    Last
(11) Name: Mr. ∨ Test       Personnel       (18) Name: Mr. ∨ Test       Personnel
(12) Title:  Test Administrator             (19) Title:  Test Administrator
(13) E-mail: test_personnel@test.com        (20) E-mail: test_personnel@test.com
(14) Phone: (999) 999-9999   (15) Ext.:     (21) Phone: (999) 999-9999   (22) Ext.:
(16) Fax:   (999) 999-9999   (17) Ext.:     (23) Fax:   (999) 999-9999   (24) Ext.:

Food Safety Coordinator                     Food Safety Coordinator Backup
              First    MI    Last                         First    MI    Last
(25) Name: Mr. ∨ Test       Personnel       (32) Name: Mr. ∨ Test       Personnel
(26) Title:  Test Administrator             (33) Title:  Test Administrator
(27) E-mail: test_personnel@test.com        (34) E-mail: test_personnel@test.com
(28) Phone: (999) 999-9999   (29) Ext.:     (35) Phone: (999) 999-9999   (36) Ext.:
(30) Fax:   (999) 999-9999   (31) Ext.:     (37) Fax:   (999) 999-9999   (38) Ext.:

Program Information
```

5. **Under Program Details:** In line (41) you will need to designate the delivery method (State versus Commercial Distributor). If you will use the State distributor, click "State".



```
Program Details

(41) Approved Delivery Drop Type:        ● State  ○ Distributor
(42) Distributor:                        [                    ∨ ]
(43) If you participate in a purchasing co-                      If your Co-
     operative, please select yours from the [          ∨ ]     operative is not
     drop down list:                                            listed, please
                                                                contact the State.
     ☐ Check if your SFA is Lead SFA for your Co-op.
```

If you have a signed contract with a commercial distributor for delivery of USDA Foods, you will select the "Distributor" button.


```
Program Details

(41) Approved Delivery Drop Type:        ○ State  ● Distributor
(42) Distributor:                        [                    ∨ ]
```

For commercial distribution only: If you selected the "Distributor" button, the "DPI and SFA Agreement for Commercial Distribution", describing the requirements of using a commercial distributor, will pop up for your review. Scroll to the bottom of the Agreement and click "Accept". Use the drop down box in line (42) to select contracted distributor. If the distributor is not listed in the drop down box of line (42), you will need to contact DPI at dpifns@dpi.wi.gov to have the distributor added to the drop down box.

Deadline for selecting a commercial distributor: The deadline for procuring and contracting with a commercial distributor for a school year is March 29 of the previous school year. Lines (41) and (42) will be grayed out to prevent changes to the delivery method. Be sure to refer to the Commercial Distribution webpage for program requirements on using a commercial distributor for delivery of USDA Foods.
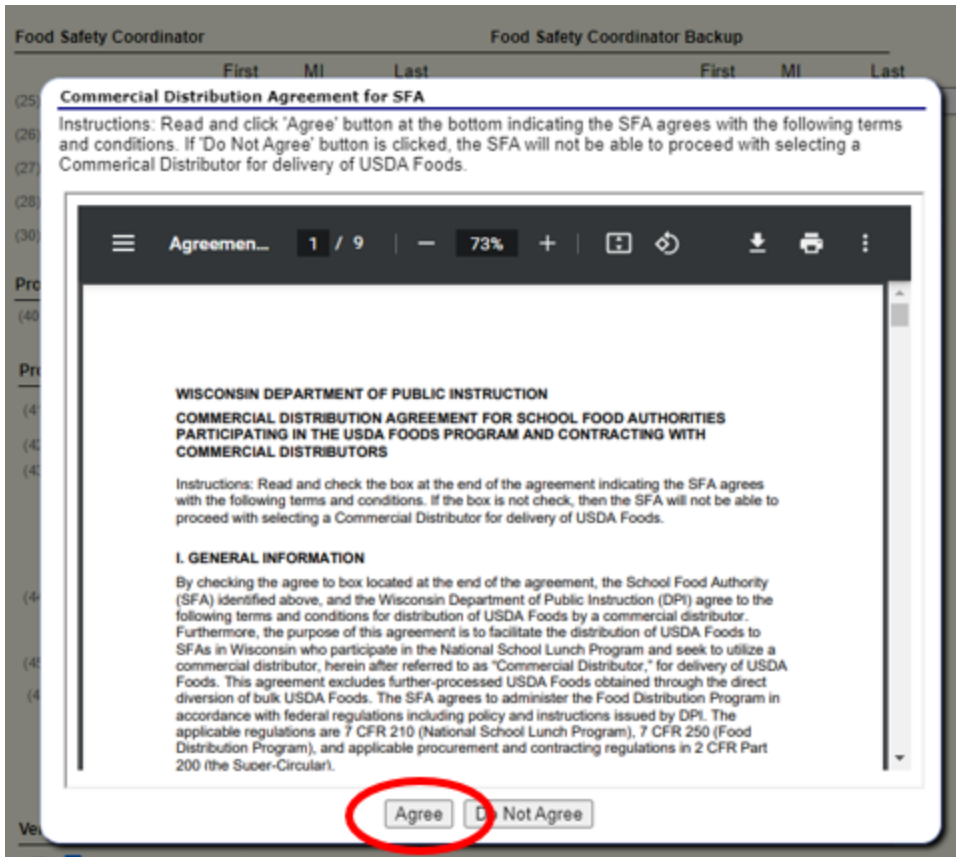
6. Line (43) Co-operatives – Ignore. DPI does not use Co-op information.

7. Line (44) Click "Yes", if another SFA prepares your meals under a joint agreement and select the name of the SFA from the dropdown.

   If you prepare your own meals, select "No", and select your SFA's name from the dropdown.

8. Line (45) **for Direct Diversion Participants only** - IMPORTANT FOR ANNUAL ORDER - Direct Diversion - If you are participating in Direct Diversion Program next year, and you will be taking the Direct Diversion Annual Order, check box 45.

   If you click the Direct Diversion box, you will get a pop up screen with the "DPI and SFA Agreement for Direct Diversion". Read the agreement (or print and read).

Click "Agree".

9. Line (47) Check on the box to certify the information on the form is correct.

10. Next, click on the "Submit" button to update the School Food Authority Contract Form.

    Please note: If you forget to check the box in line (47), the form **will not** be submitted and will remain in "Pending Submission" status. In "Pending Submission" status, your agency will be unable to order or receive any USDA Foods.

11. After you have submitted the School Food Authority Contract Form, you will see a message that indicates whether your form has been successfully submitted. Read the message to ensure that the form was submitted successfully. At the bottom of the message screen, it will state "Click here to go to Sponsor Summary." Click on the word "here" to go back to the "School Food Authority Summary" screen.

12. **Pending Approval and Approved Contract Status:** After you have submitted the School Food Authority Contract Form, your contract status will change to "Pending Approval." This means that the form is "Pending "Approval" by DPI. **Please note:** the form will remain in "Pending Approval" status until DPI is able to verify that your agency has a valid National School Lunch Contract for the applicable school year that your agency has submitted a School Food Authority Contract Form for. Once the form has been approved by DPI, the status will change to "Approved." **Please note**: Since DPI will not be able to "Approve" the School Food Authority Contract Forms right away, your agency **will be** able to make additional changes to your School Food Authority Contract Form when it is in "Pending Approval" status. In addition, once your agency has submitted this form, your

agency will be able to complete the annual USDA Foods order. You **do not** need to wait for DPI to approve this form. After the first initial approval of your School Food Authority Contract Form, the "Revise" button will replace the "Edit" button that was displayed prior to being "Approved."

13. **Uncertified Status:** Prior to your agency receiving actual USDA Foods deliveries for the specified program year, DPI will verify that your agency has an approved National School Lunch Program (NSLP) contract. If the USDA Foods Section has approved your application in the *Wisconsin USDA Foods Ordering System*, but your agency does not yet have an approved NSLP contract for the specified year; the status for the School Food Authority Contract Form will be listed as "Uncertified."

If your School Food Authority Contract Form remains listed as "Uncertified" when DPI begins to create monthly orders for the specified program year, DPI will manually verify your NSLP participation for the specified year. Therefore, for the months of September and October, your agency will be allowed to receive orders in an "Uncertified" status.

However, if your agency does not have an approved NSLP contract on file by the end of October and still remains in "Uncertified" status, your agency will not receive USDA Foods orders for the remainder of the specified program year.

14. **Delivery Location Form:** Next, you will need to verify the information on the Delivery Location Form. To verify the delivery location information, click on the "Edit/Revise" button that is located to the right.

15. Review and update the information listed on the SFA Delivery Location Form. After the information has been reviewed and updated, click on the "Submit" button at the bottom of the form. **Please note:** after the first initial approval of your School Delivery Location Form, the "Revise" button will replace the "Edit" button that was displayed prior to being initially "Approved."

16. After you have submitted the Delivery Location Form, you will be taken back to a message indicating whether your form has been successfully submitted. Read the message to ensure that the form was submitted successfully. At the bottom of the message screen, it will state "Click here to go to Sponsor Summary." Click on the word "here" to go back to the School Food Authority Summary Screen.

III. Annual Order Survey

A. General Information

All agencies that have submitted "Pending Approval" contracts must place an annual order (called a Survey in this system) for the following school year.

If an agency signs up to participate in the USDA Foods Program after the annual order period, that agency will not be able to place an annual order for the first program year. For the first program year, this agency will be able to receive fair-share or surplus USDA Foods that become available through USDA during the school year.

B. Placing the Annual Order Survey

1. In order to place your annual order (called a Survey in this system), your agency must first review and complete any necessary changes to the School Food Authority Contract Form and the Delivery Location Form. For instructions on updating the School Food Authority Contract Form and the Delivery Location Form, please refer to the instructions under **Contract Application and Delivery Location Forms** section II above.

   Please note: In order to be able to place your annual order, the School Food Authority Contract

Form and the Delivery Location Form must be submitted ("Pending Approval" status; neither of these forms need to be in "Approved" status). If your agency has not completed both of these forms, the "Survey" tab will display a "Must have a Valid Contract" message until these two forms are submitted.

2. Now that the School Food Authority Contract Form and the Delivery Location Form have been reviewed and updated, your agency may place your annual order. Click on the "Survey" tab that is located on the School Food Authority Summary Screen.

3. Once you have accessed the "Survey" tab, there will be two surveys listed: State Processing Survey and Direct Diversion Processing Survey.

4. Both surveys give SFAs the option to order from Direct Delivery Brown Box USDA Foods and DoD Fresh Produce.

   The "State Processing Survey" is for SFAs NOT participating in Direct Diversion.

   The "Direct Diversion Processing Survey" is for SFAs that have planned and have accepted processor and commercial distributor contracts and agreements to participate in direct diversion of bulk USDA Foods for further processing into finished end products. If your SFA plans to take the Direct Diversion Survey, review the application tab. If the "Sponsor Group" doesn't indicate Direct Diversion processing, call DPI at 608-267-4599 or 608-267-4598 to be added to the survey group.

5. If your agency selects the "Direct Diversion Processing Survey," you will not have access to the state processed products that are obtained by DPI through the state procurement process.

6. To select the desired annual order survey, click on the "Edit" link that is located to the right of the Survey Name Section (under the "Action" column).

   Please note: If more than one order survey is offered to participating agencies within the same Program Year, it will not be necessary to select a survey for surveys occurring after the initial order survey (since your agency has already designated participation in either the state-

processing program survey or the direct diversion processing survey). In addition, after the first survey has been selected, participating agencies will be unable to switch survey types (state processing versus direct diversion processing) for the remainder of the Program Year.

Your agency will now see the annual order screen that is specific to your agency. The top of the screen will list entitlement data specific to your agency. As you begin to enter and save your annual order survey data, the entitlement specific data will update to reflect these requests.

Please note: If your SFA has planned to participate in Direct Diversion, but it is not listed on the Summary Table, you will not have access to the Direct Diversion survey. If your agency selects the wrong survey, you will need to contact DPI at dpisnusdafoods@dpi.wi.gov for assistance.

6. Below the entitlement data at the top of the screen, the first entry area is for the Department of Defense Fresh Produce Program (DoD). DoD has a minimum delivery order requirement. The required minimum entitlement dollar commitment is shown as the "Minimum Ent. Commitment" under the DoD Program section. If your agency opts to participate in DoD, the system will require an entitlement commitment that is equal to or greater than the minimum.

7. For agencies that want to participate in the DoD Fresh Produce Program, enter a dollar commitment in the "Enter $ Commitment for DoD" box.

8. In the "Extra $ Commitment for DoD", schools can enter any desired additional entitlement DoD commitment. After the close of the annual order survey and as product truck loads are balanced, it is possible that DPI may need to adjust down some of your USDA Foods order requests. If DPI adjusts down other USDA Foods order requests, this may free up additional entitlement dollars for your agency to spend on DoD. If this occurs, DPI will use the amounts indicated in the "Extra $ Commitment for DoD" to distributed additional entitlement dollars to your agency. The "Extra $ Commitment for DoD" will not be subtracted from your agency's total entitlement allotment unless DPI is able to allocate extra entitlement after the close of the annual order survey.

9. Once you have entered your desired DoD commitment information, click on the "Submit" button that is located at the bottom of the screen.

10. If your agency clicks on "Submit," you will be taken back to the "Survey" tab. To re-access the survey entry screen, click on the "Edit" button.

Below the DoD Fresh Fruit and Vegetable Program section, the remainder of the survey entry screen is divided up by "Product Category."

On this screen, you will see the following columns for each "Product Category":

Product Category
USDA groups foods into product categories. These categories are grouped by USDA based on procurement and spending availability.

Cap Percent
For some of the USDA Foods, there may be limitations on the amount of product available for USDA to purchase. Therefore, USDA sometimes establishes entitlement spending caps on these products. These USDA spending caps are based on broad product categories. If there is a zero listed in this column for a "Product Category," there is no USDA assigned spending cap.

Cap Value
If there is a spending cap percentage, this is the entitlement dollar maximum allowed for your agency to spend in this product category (i.e. the percent listed in the Cap Percent column times your agency's total available yearly entitlement). **Please note:** the cap value includes all types (End Products and Raw Products combined) of commitments within that "Product Category." If there is a zero listed in this column, there is no USDA assigned spending cap percentage or value.

Entitlement
As your agency enters and submits product requests on the annual order survey, the entitlement column will update to reflect total entitlement spent by "Product Category."

To begin entering product requests on the annual order survey, click on the links located to the left of the desired "Product Category."

Depending on the "Product Category", the following two links may be available:

End Products
Regardless of which survey has been selected, the "End Products" link will contain the Direct Delivery Brown Box USDA Foods. For agencies that have selected the "Direct Diversion Processing Survey," the end product screen will contain only the Direct Delivery Brown Box USDA Foods. However, for agencies that have selected the "State Processing Survey," the screen will also contain the 12 core state-processed products.

Raw Products
The raw products screen will contain commitment information for diverting bulk USDA Foods to selected processors. For agencies that have selected the "Direct Diversion Processing Survey," there will be a "Raw Product" link for all product categories that have been approved for direct diversion processing. For agencies that have selected the "State Processing Survey," there will only be one "Raw Product" link. This "Raw Product" link will be listed for the Cheese "Product Category"

and will be for commitments to the Cheese Processing Program. In prior years' surveys, the Cheese Processing Program was listed as a separate heading on the survey entry screen. However, with the new survey, it is listed under this "Raw Product" link for the Cheese "Product Category."

C. End Product Link Entry

1. To begin entering "End Products" requests, click on the "End Products" link for the desired "Product Category." This will take you to the "Survey End Products" screen.

   At the top of this screen, you will see entitlement specific data for your agency and for this particular "Product Category." If there is a product category cap for this "Product Category," the entitlement value of this cap will be listed under the "Product Category Cap" row.

   Your agency may now begin to enter desired cases by delivery month for each USDA Food in the "cases" row of each USDA Food. **Please note:** the months listed for each product indicate the months the product will be delivered to your agency. It does not necessarily indicate what month your agency will be serving the product.

   Since this is an annual order, each agency should try to request all of your available entitlement allotment. Also, since DPI will have to balance USDA Foods requests to equal full truck loads, your agency may not receive exactly what is requested on the annual order. Therefore, each agency will be allowed to request up to 105% of your annual entitlement allotment.

   Product Availability
   Not all USDA Foods are available year round. If a USDA Food is not available for a particular month, the entry box for this month will be grayed out and will not allow data entry.

   Processing Fee
   For products that are processed through the State processing program, a processing fee will apply. The processing fee, if any, will be listed under the "Proc Fee" section of each USDA Foods product. If your agency has selected the "Direct Diversion Processing Survey," the "Proc Fee" column is not applicable.

2. The entry boxes are automatically pre-filled with zeros. In order to automatically eliminate the zero, use the tab key to move from one entry box to the next. If you click on the entry box using your mouse, the zero may remain and will become part of your entry.

3. In addition to the "cases" row for each USDA Food, there is an "Extra" row. Based on total yearly entitlement, there may be product that your agency is unable to order. If there are additional products that your agency would like to request, you can enter these in the "Extra" rows. However, the purpose of the "Extra" rows is to assist DPI in balancing truck loads for each product. There is no guarantee that your agency will receive products requested through the "Extra" rows. Case numbers entered in the "Extra" rows will not affect your total entitlement requested on the annual order. Entitlement dollars for agencies entering cases in the "Extra" rows will only be committed if DPI uses an "Extra" request during the truck load balancing process.

4. To save and submit your "Product Category" end product requests, your agency must click on the "Submit" button that is located at the bottom of the form. Your agency does not necessarily have to enter the entire annual order at one time. You may review and/or change the annual USDA Foods order as many times as desired during the annual ordering period. **However, once the annual ordering period is over adjustments <u>cannot</u> be made to the annual order.**
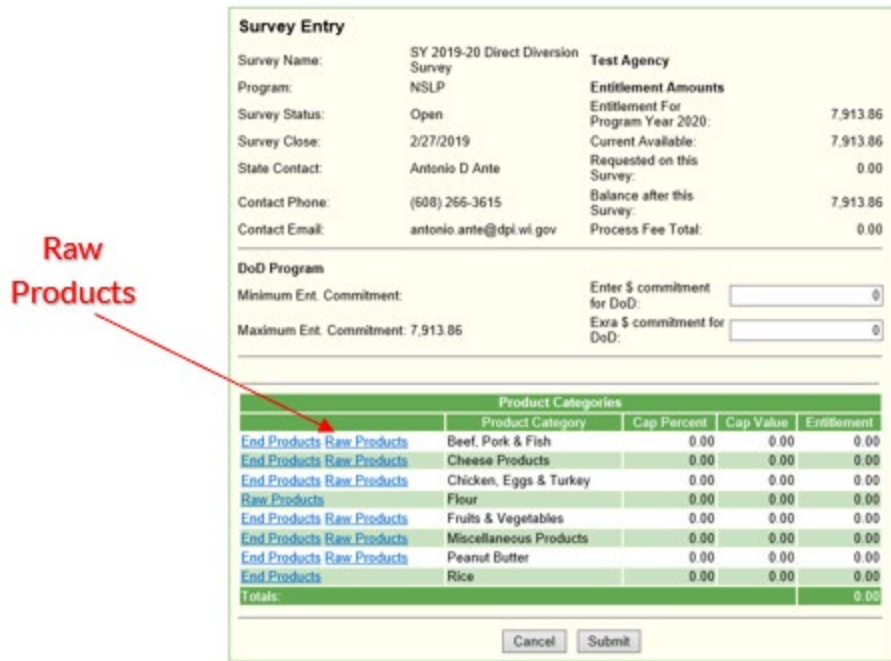
   Once you have submitted end product requests for a particular "Product Category," your agency will be taken back to the initial survey entry screen. Any requests made in the "Product Category" will now be reflected under the "Entitlement" column for that particular "Product Category."

5. To enter requests for all other "End Product" USDA Foods, follow the "End Product" steps listed above.

D. Raw Products Entry Link

1. To enter requests for bulk USDA Foods commitments to selected processors, click on the "Raw Products" link for the desired "Product Category." For agencies using the "State Processing" survey, your agency will only need to access the "Raw Products" link (under the Cheese "Product Category") if your agency wishes to participate in the Cheese Processing Program. For agencies using the "Direct Diversion Processing Survey," all bulk USDA Foods commitments to selected processors will be under the "Raw Products" links.
2. Once you have selected a specified "Raw Products" link, your agency will be taken to the "Select A Raw Product" screen. All raw USDA Foods associated with this particular "Product Category" will be listed here. These raw USDA Foods are in bulk format and must be directly shipped (by DPI) to a processor for further processing.

3. The following columns will be listed on the "Select A Raw Product" screen:

Code
This is the USDA material identification code assigned to the raw product.

Raw Product for Processing
This is the product description for the raw product.

Unit
There are two types of USDA Foods units: pounds or cases. Please reference this column when making your raw product commitments to selected processor(s). Commitments to processors are based on the unit listed in this column.

USDA Value
This is the entitlement value that will be subtracted from your yearly entitlement allotment. The value listed is per unit type (i.e. pounds or cases) listed in the "Unit" column.

Total Units
As you enter raw product commitments, the total units requested for this raw product will be reflected in this column.

Entitlement
As your agency enters and submits raw product requests on the annual order survey, the entitlement column will update and reflect total entitlement spent by "Raw Product for Processing."

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4. To begin entry of a desired "Raw Product for Processing," click on the "Select" link located to the left of the "Code" column.

5. You will now be taken to the "Survey Raw Products" screen. All eligible processors associated with the selected raw product will be listed on this screen.

6. The following two columns will be listed on this screen:

Column 1 – (labeled "Pounds")
The first column is for entering the desired raw product commitment(s) for the selected processor(s). This column will be listed as either pounds or cases, depending on the applicable unit type.

Column 2 – (labeled "Extra")
In addition to Column 1 for each raw USDA Food, there is an "Extra" column. Based on total entitlement and entitlement product category caps, your agency may be unable to request all desired raw USDA Foods commitments. If there are additional raw products that your agency would like to request, you can enter these in the "Extra" column. However, the purpose of the "Extra" column is to assist DPI in balancing truck loads by processor for each raw USDA Food. There is no guarantee that your agency will receive the raw USDA Foods requested through the "Extra" column. Commitments entered in the "Extra" column will not affect your total entitlement requested on the annual order. Entitlement dollars for agencies entering cases in the "Extra" column will only be committed if DPI uses an "Extra" request during the truck load balancing process.

7. Enter desired raw product commitments for each selected processor in Column 1. The entry boxes are automatically pre-filled with zeros. In order to automatically eliminate the zero, you must use the tab key to move from one entry box to the next. If you click on the entry box using your mouse, the zero will remain and will become part of your entry.

8. Agencies can commit raw USDA Foods to as many eligible processors as desired. In order for DPI to directly ship raw USDA Foods to a processor, participating agencies' commitments must equal a minimum of 1/2 truck load state-wide to each processor. In addition, the commitments must be shipped in truck load increments. Therefore, DPI may need to prorate agencies' commitments up or down to make truck loads.

It is possible that one or more processors may not receive sufficient commitments to equal the minimum required 1/2 truck load. Therefore, it is recommended that agencies enter raw product commitments in the "Extra" column, where feasible. Also, where feasible, agencies may want to commit raw product to multiple processors in the "Extra" column.

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9. Once your agency has entered all desired raw USDA Foods commitments for the raw product, click on the "Submit" button at the bottom of the screen.

10. Your agency will now be taken back to the "Select A Raw Product" screen.

11. Any requests made in the "Raw Product" screen will now be reflected under the "Total Units" and the "Entitlement" columns for that particular "Raw Product."

12. If there is more than one raw product for processing in this "Product Category," repeat the entry steps outlined above.

13. Once you have entered all desired raw product requests for this "Product Category," click on the "Previous Page" button that is located at the bottom of the "Select A Raw Product" screen.

Survey Entry

Survey Name:	SY 2019-20 Direct Diversion Survey	**Test Agency**	
Program:	NSLP	**Entitlement Amounts**	
Survey Status:	Open	Entitlement For Program Year 2020:	7,913.86
Survey Close:	2/27/2019	Current Available:	7,913.86
State Contact:	Antonio D Ante	Requested on this Survey:	686.00
Contact Phone:	(608) 266-3615	Balance after this Survey:	7,227.86
Contact Email:	antonio.ante@dpi.wi.gov	Process Fee Total:	0.00

DoD Program

Minimum Ent. Commitment:	Enter $ commitment for DoD:	0
Maximum Ent. Commitment: 7,913.86	Exra $ commitment for DoD:	0

	Code	Raw Product for Processing	Unit	Usda Value	Total Units	Entitlement
		Select A Raw Product				
Select	100154	BEEF BLK COARSE (A594)	Pounds	2.32	200	464.00
Select	100156d	BEEF SPECIAL	Pounds	3.23	0	0.00
Select	100193	BONELESS PICNIC (A632)	Pounds	1.11	100	111.00
Select	110601	FISH, ALASKAN POLLOCK	Pounds	1.11	100	111.00
Raw Products Total:						686.00

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14. You now will be taken back to the initial survey entry screen.

15. Any requests made in the "Product Category" will now be reflected under the "Entitlement" column for that particular "Product Category."

16. To enter requests for all other "Raw Product" USDA Foods, follow the "Raw Product" steps listed above.

17. After your agency has entered all desired "Raw Product" and "End Product" requests, you will be on the initial survey entry screen. To exit the initial survey entry screen, click on either the "Cancel" button or the "Submit" button at the bottom of the initial survey entry screen.

Cancel or Submit

E. Survey Tab Differences

The "Edit" and "View" links have different functionalities.

Edit
The edit link is for entering/modifying product requests during the annual order period. After the close of the annual order period, the "Edit" link will no longer be displayed.

View
As product requests are entered, the view link can display both yearly and monthly totals for grand total spent and grand total requested by "Product Category."

Please note: You will not be able to print the entire annual order survey on one print out sheet. In order to print copies of annual order totals, this can be achieved by two methods: either by accessing the "Edit" link (only available during the annual order period) and individually printing each request under each "Product Category," or by accessing the "View" link and pulling up the order by month to print monthly totals.

1. To access yearly and monthly totals for grand total spent and grand total requested by "Product Category," click on the "View" link that is listed on the "Survey" tab.

FDP   Wisconsin Department of Public Instruction

Survey Results

Test Agency (139999)   Program Year: 2020   Survey Name: SY 2019-20 State Processing Survey   Month: All

Program	Start Date	End Date	Status	DoD	DoD Extra	DoD Adj
NSLP	2/11/2019	2/27/2019	Open	$1,000.00	$400.00	$1,000.00

UNPFV	UNPFV Extra	UNPFV Adj
$0.00	$0.00	$0.00

Product Code	Product Desc	Ent Value	Processing Fee	Total Requested	Total Extra	Adj	Fill	Bal
Category: Beef, Pork & Fish								
100158	BEEF 40 (A608)	$4,835.70	$0.00	45	4	45	0	45
100187	HAM CKD FRZ SLC (A726)	$0.00	$0.00	0	0	0	0	0
100188	HAM CKD FZ CUBE (A727)	$0.00	$0.00	0	0	0	0	0
110851	FISH AK POLL STCKS	$611.52	$0.00	7	0	7	0	7
C418	BEEF CRUMBLES, AT	$1,197.28	$381.12	16	2	16	0	16
C600	PORK TACO FILLING	$0.00	$0.00	0	0	0	0	0
C615	PORK BBQ, CP5406	$0.00	$0.00	0	0	0	0	0
Category: Cheese Products								
100012	CHED RD FT SHD Y 6/5 (B027)	$61.07	$0.00	1	0	1	0	1
100021	MOZZ LMPS SD 30 (B037)	$0.00	$0.00	0	0	0	0	0
C710	MOZ PIZZA STICKS	$19.73	$13.89	1	0	1	0	1
C712	CHEESE SLICES	$0.00	$0.00	0	0	0	0	0
C722	CHEESE QUESADILLAS	$0.00	$0.00	0	0	0	0	0
Category: Chicken, Eggs & Turkey								
100101	CHIX DICED (A517)	$0.00	$0.00	0	0	0	0	0
100125	TURKEY ROASTS (A537)	$0.00	$0.00	0	0	0	0	0
110462	CHICKEN STRIPS FRZ	$0.00	$0.00	0	0	0	0	0
110911	TURKEY HAM SLCD	$0.00	$0.00	0	0	0	0	0
110921	CHICKEN FILLTS UNBR	$0.00	$0.00	0	0	0	0	0
110931	EGG PTTY, RND, FRZ	$100.00	$0.00	2	0	2	0	2

2. The "Survey Results" screen can be used to pull up grand totals for the entire survey year or to pull up monthly totals. Each time that you access the "Survey Results" screen, the system automatically defaults to the yearly survey grand totals.

3. To select a particular month's individual totals, you will need to use the "Month" drop down box (located at the top of the "Survey Results" screen) and change the drop down to the desired month's totals. Once you have selected a particular month, the totals listed will only include requests for the designated month.

4. Underneath the words "Survey Results" and your school's name, the following information will be listed: Survey Start Date, Survey End Date, Survey Status, DoD, DoD Extra, and DoD Adj.

Survey Start Date
This is the first day that agencies may start to enter orders on the annual order survey.

Survey End Date
This is the last day that agencies may enter orders on the annual order survey.

Survey Status
There are three potential listings for survey status:

"Open" status indicates that it is the annual order period and orders may be placed/modifications can still be made to the order.
"Balance" status indicates that the annual order period is closed. However, DPI is balancing all orders to equal truck load quantities. Therefore, the numbers the totals that are listed when the system is in this status **are not final** and may not include all adjustments that DPI may need to make for truck load balancing purposes.

"Fill" status indicates that all balancing has been completed by DPI and that totals listed reflect what DPI has ordered from USDA on behalf of your agency. Once the status has been changed to "Fill," the status will remain in the "Fill" status throughout the school year.

DoD
If your agency has entered an entitlement dollar commitment to the Department of Defense (DoD) Fresh Produce Program, the requested amount will be displayed under "DoD."

DoD Extra
If your agency has requested additional dollars for the DoD program, this amount will be displayed under "DoD Extra."

DoD Adj
After the survey is closed and DPI has balanced all DoD requests at a state-level, the DoD adjusted amount will be listed under "DoD Adj." This reflects the final amount that your agency will be able to spend toward the DoD Fresh Produce Program.

5. The "Survey Results" screen will display the following columns:

Product Code
This is the USDA material identification code assigned to the selected USDA Food.

Product Desc.
This is the product description for the selected USDA Food.

Ent. Value
This is the total entitlement value for the total requested per each USDA Food listed.

Processing Fee
For products that are processed through the state processing program, a processing fee will apply. The processing fee, if any, will be listed under the "Processing Fee" section of each USDA Food. The amount listed is a grand total processing fee for the total requested per each USDA Food listed. If your agency has selected the "Direct Diversion Processing Survey," the "Processing Fee" column is not applicable.

Total Requested
The total requested column will reflect the grand total requested for each USDA Food. **Please note:** if your agency is using the "Direct Diversion Processing Survey" or committing product for the Cheese Processing Program under the "State Processing Survey," this column will contain quantities of both total pounds and total cases requested.

Total Extra
For each USDA Food, the total extra column will reflect the grand total requested of product through the "Extra" rows/columns of the annual order survey. **Please note:** if your agency is using the "Direct Diversion Processing Survey" or committing product for the Cheese Processing Program under the "State Processing Survey," this column will contain quantities of both total extra pounds and total extra cases requested.

Please note: The Total Requested and Total Extra columns serve as historical records once the survey is in "fill" status. These columns are only used during the DPI balancing process.

Adj
Adjusted (Adj) – This is the total number of cases/pounds that was ordered for your agency by DPI. This adjustment reflects any adjustment that DPI may have made to balance out truck load ordering. It also would include any extra cases/pounds that DPI was able to order through the balancing process. The adjusted column is the column that DPI will use to fill and create orders, once product arrives from USDA.

Fill
Fill – As product begins to be delivered into the DPI contracted warehouses and DPI creates orders, the Fill column reflects the total number of cases/pounds that have been filled and satisfied into orders. Please note: if product is delayed by USDA and/or a processor and DPI is unable to fill that order for a particular month, the survey results screen will indicate which product that your agency is still owed. If and when this product comes in, DPI will fill any outstanding balances on future orders.

Bal
Balance (Bal) – This column reflects the total number of cases/pounds that have not been filled and satisfied into orders.

Totals
The last row of the screen displays the grand total of each column listed. In the grand total sections, the abbreviation **"cs"** stands for **cases** and the abbreviation **"pnd"** stands for **pounds**.

F. Raw Products Links

1. For raw products (used for the "Cheese Processing Program" and/or the "Direct Diversion Processing Program,") the amounts listed on the yearly breakdown are grand total commitments for that USDA Food (Please note: the commitments for raw products are also listed in the monthly totals for the month of January). They do not list the individual commitments to each processor.

2. To view the individual USDA Food commitments to each processor, you will need to click on the desired material identification code. (For example, to see the individual commitment to 100154, bulk beef, click on the number "100154").

3. Once you have clicked on the desired raw USDA Food, you will be taken to a screen that displays the individual processor commitments for this USDA Food.

3. Underneath the "Survey Start Date" and the "Survey End Date" information, the following data will be displayed:

Product Code
This is the material identification code of the raw product that has been selected.

Product Desc.
This is the product description for the selected USDA Food.

Unit Type
This is the unit of the requested commitments. The unit listed will be either pounds or cases.

Pack Size
This is the packaging per unit type for the selected USDA Food.

4. Below this information, the following columns will be displayed:

Processor Name
This indicates the potential processor for the applicable commitment.

Total Requested
The total requested column will reflect the grand total requested for each processor by unit type.

Total Extra
For each USDA Food, the total extra column will reflect the grand total requested for each processor through the "Extra" rows/columns of the annual order survey.
Please note: The Total Requested and Total Extra columns serve as historical records once the survey is in "fill" status. These columns are only used during the DPI balancing process.

Adj
Adjusted (Adj) – This is the total number of cases/pounds that was ordered for your agency by DPI. This adjustment reflects any adjustment that DPI may have made to balance out truck load ordering. It also would include any extra cases/pounds that DPI was able to order through the balancing process.

Fill
Fill – After DPI has ordered the bulk USDA Foods to be delivered into the processors' warehouses, DPI will begin to fill and invoice administrative fees for bulk USDA Foods diverted to processors for further processing. The Fill column reflects the total number of cases/pounds that have been filled/invoiced for your agency.

Bal
Balance (Bal) – This column reflects the total number of cases/pounds that have not been filled/invoiced for your agency.

To exit the "Raw Product" link screen, click on the "< Back" button that is located at the bottom of the screen.
To exit the Survey Results "View" screen, click on the "Cancel" button that is located at the bottom of the screen.

IV. Allocations

A. General Information
1. All products that have been allocated to your agency will be listed under the "Allocations" tab. This includes products your agency has been allocated based on your annual order, as well as additional products allocated to your agency on a fair-share basis. The fair-share products are items that your agency has not yet requested, and your agency **must** order these products to receive them. Typically the fair-share products will be bonus USDA Foods. To access the USDA Foods allocated to your agency, click on the "Allocations" tab. It is the 4th tab from the left and located below the "School Food Authority Summary" title.

2. All allocations created in the system will continue to be displayed in the system permanently. The most recent allocations will be at the top of the allocation list.

3. For every allocation that your agency has received, the following categories will be listed:

   - Alloc Id – (Allocation Identification) For every allocation, the system will assign an identification code. The identification code contains both an alphabetic and numeric sequence. The alphabetic portion of the identification code will indicate the type of allocation. The numeric portion is a computer assigned code. There are 3 categories of allocations represented by the alphabetic portion of the code:
     Alloc = This represents an allocation that is a result of a fair-share allocation.
     SVY = This represents an allocation that is a result of the annual USDA Foods order placed by your agency.
     Surp = This represents an allocation as a result of your agency placing a surplus request.

- Alloc Date – (Allocation Date) This is the first date that your agency will be able to place an order for the product that has been allocated. This date is only applicable for the fair-share allocations (Alloc). Typically, this date will be the 3rd of the month prior to the month that you are requesting product for (i.e. August 3rd for September Delivery).

- Accept Date – This is the last date that your agency will be able to place an order for the product that has been allocated. This date is only applicable for the fair-share allocations. Typically, this date will be the 10th of the month prior to the month that you are requesting product for (i.e. August 10th for September Delivery). After the Accept date has ended, the system will not allow any agency to edit the allocation.

- Accepted – This column indicates the status of the allocation. "Yes" status indicates that your agency **has** accessed the system, accepted/adjusted the allocation amounts, and clicked on the "Accept" button at the bottom of the screen. "No" status indicates that your agency **has not yet** accepted/adjusted the allocation amounts. Please note: If your agency accesses the system and just views an allocation, **you will not** receive the allocation. You must click on the "Accept" button to actually receive the allocation.

- Expire Date – This is the date by which the State will complete your allocation requests into delivery orders. Typically, this will be the 15th of the month prior to the month that you are requesting product for (i.e. August 15th for September Delivery).

- Avail Qty (Available Quantity) – The total number of cases allocated to your agency. **Please note:** after the allocation has been used to create an "Order" in the system, this amount will be zero.

B. Survey Allocations (SVY)

1. For this type of allocation, no modifications are required or allowable. The system will create the allocation, based on your annual USDA Foods order requests. The amounts and products may vary from your original annual order for one or more of the following reasons: slight adjustments made by DPI to balance state-wide orders into truck loads, cancellation of a product by DPI as a result of state-wide orders being less than a truck load shipment, and/or product shipment is delayed by USDA.

2. To view the survey allocation, click on "View" under the Action column for the desired allocation. Each survey allocation listed typically represents one delivery month.

C. Fair-share Allocations (Alloc)

1. The fair-share allocations are products that your agency has not yet ordered. These are products that DPI has ordered and received at the warehouse(s) and are being offered out to agencies on a fair-share basis. **Please note:** you will only receive these products, if your agency orders them. If your agency does not access the system and follow the below listed steps to "Accept" the fair-share products, your agency **will not** receive the products(s) that have been allocated to your agency. Please see above for description of the order categories and time frames.

2. To view and/or order the fair-share allocation, please complete one of the following actions:

- View – Click on "View" under the Action column for the desired allocation. If you click on "View," your agency can only view the allocation. You will not be able to edit the allocation in view mode.
- Edit – Click on "Edit" under the Action column for the desired allocation. If you click on "Edit," your agency will be able to request product for the allocation.

3. Fair-share allocations may or may not be available each month. Therefore, your agency will need to access the system from the 3-10th of each month to check for fair-share allocation availability.

4. During the allocation period (between the Alloc date and the Accept Date) when your agency can request products, you will see both the "View" and the "Edit" options. However, after the allocation period has ended, you will only see the "View" option. At this point, no modifications can be made to this allocation.

5. To request product during the allocation period, click on "Edit" that is located under the Action category for that particular allocation.

6. Your agency will now see the products and amounts that are available to your agency to order for this allocation. The following categories will be listed:

- ENT Value (Entitlement Value) – This is the amount/case that USDA paid to purchase this particular product. For every case that your agency requests, this value will be subtracted from your agency's total entitlement allotment. Each agency is given a yearly entitlement allotment that is based on your agency's prior year's total reimbursable NSLP meals served multiplied by the federal assistance rate, which is determined by USDA, based on Food index calculations. If the product is a bonus USDA Food, the entitlement value will be listed, but will not be subtracted from your agency's total entitlement allotment.

- Alloc Qty (Allocated Quantity) –Based on what has been received in the warehouse, this is the amount of product that your agency has been allocated.

- Accept Qty (Accept Quantity) – This is the amount of product, that your agency would like to receive. **Please note:** when requesting amounts, your agency **can not** exceed the number that is listed in the Alloc Qty. Your agency may request none, less, or all of the Alloc Qty, but cannot exceed the Alloc Qty. If your agency would like to request any additional amounts of available quantities, this will need to be done through a surplus request, which is covered later in the instructions.

- Handling Fee Per Case – This is the amount/case that your agency pays for the administration, storage, and delivery (if using the state-contracted delivery system) of USDA Foods.

- Proc Fee (Processing Fee) – If this product is the result of a bulk USDA Food being processed into a finished end product through a state processing contract, a processing fee/case will also be charged.

- Total Fees – Based on the number of cases requested, this is the sum total of the Handling Fees and the Processing Fees.

FDP
Allocation Form

Wisconsin Department of Public Instruction

	Allocation Id:	Alloc31930
	ProgramYear:	2019
	Program:	NSLP

Allocation Date	Last Acceptance Date	Expiration Date
1/3/2019	1/10/2019	1/15/2019

Important! In order to receive allocated products listed on this form you should first make any changes in the Accept Qty column then click the 'NextPage' button and click the 'Accept' button on the next page. If you do not proceed to the next page and click the Accept button, you will not receive any of products listed.
You can only reduce the product quantities. If there are any products you do not wish to receive change the Accept Qty to zero.

Handling Fees & Processing Fees

Code	Description	ENT Value	Alloc Qty	Accept Qty	Avail Qty	Handling Fee Per Case	Process Fee Per Case	Total Fees
Entitlement Commodities								
100348	CORN FRZ (A130) Size: 30 LB CTN Storage: Freezer	15.32	5	5	5	0.79	0.00	3.95
	Total Commodities	76.60		5				3.95
No Charge Commodities								
100224	PEARS SLC (A433) Size: 6/#10 CAN Storage: Dry	26.38	4	4	4	1.14	0.00	4.56
	Total No Charge	105.52		4				4.56
	Total All Commodities	$182.12		9				$8.51

[Next Page >] [Cancel]

7. Listed under the Alloc Qty column for each USDA Food is the amount of cases that your agency has been allocated. The system automatically pre-fills the quantity that your agency has been allocated into the Accept Qty column. If you want none or less than the amount than has been allocated to your agency, fill in the amount desired for each product in the Accept Qty column. To change the desired amount to less than your agency has been allocated, use the tab button. This will highlight the figure that has been pre-filled and you may now enter the desired amount. If you want none of the product, enter a zero.

   Please note: you may not exceed the amount that your agency has been allocated. If your agency desires any available additional products, this must be done through a surplus request. The surplus request will be covered later in the instructions.

8. After your agency has entered the desired case numbers for all of the allocated product, click on the "Next Page >" button that is located at the bottom of the screen. **IMPORTANT:** If you select the cancel button (that is located at the bottom of the screen) or exit out of this screen prior to selecting the "Next Button," your order **will not** be submitted and your agency **will not** receive the desired products.

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FDP   Wisconsin Department of Public Instruction

Allocation Form

Allocation Id: Alloc31930
ProgramYear: 2019
Program: NSLP

Allocation Date	Last Acceptance Date	Expiration Date
1/3/2019	1/10/2019	1/15/2019

Important! In order to receive allocated products listed on this form you should first make any changes in the Accept Qty column then click the 'NextPage' button and click the 'Accept' button on the next page. If you do not proceed to the next page and click the Accept button, you will not receive any of products listed. You can only reduce the product quantities. If there are any products you do not wish to receive change the Accept Qty to zero.

Code	Description	ENT Value	Alloc Qty	Accept Qty	Avail Qty	Handling Fee Per Case	Process Fee Per Case	Total Fees
Entitlement Commodities								
100348	CORN FRZ (A130) Size: 30 LB CTN Storage: Freezer	15.32	5	5	5	0.79	0.00	3.95
	Total Commodities	76.60		5				3.95
No Charge Commodities								
100224	PEARS SLC (A433) Size: 6/#10 CAN Storage: Dry	26.38	4	4	4	1.14	0.00	4.56
	Total No Charge	105.52		4				4.56
	Total All Commodities	$182.12		9				$8.51

[< Prev Page] [Cancel] [Accept]

Accept →

9. Once you have clicked on the "Next Page >" button, your agency will be taken to the summary page of all requested products. Review all of the numbers in the "Accept Qty" column to ensure the accuracy of all numbers requested.

If you find an error on the numbers that are reflected on this page, click on the "< Prev Page" (Previous Page) button that is located at the bottom of the screen and you will be taken back to the prior page. In order to see the "< Prev Page" button, you may have to use the scroll button that is located on the right-hand side of the screen; and scroll down to the bottom of the page.

If your agency requests less or none of the amounts that have been allocated to you, the amounts refused will automatically become available in surplus as soon as your agency has clicked on the "Accept" button. At this point, any agency in your same warehouse region will have access to the amounts that your agency has refused through the surplus request screen.

10 Once you have confirmed the accuracy of the numbers, click on the "Accept" button that is located at the bottom of the screen. (In order to see the "Accept" button, you may have to use the scroll button that is located on the right-hand side of the screen; and scroll down to the bottom of the page.) When your allocation has been processed, you will be taken back to the School Food Authority Summary Screen. If you want to ensure that your order has been updated, go back into the allocation tab and click on the "View" button that is located on the far right side of where the allocation is listed.

FDP   Wisconsin Department of Public Instruction

Allocation Form

Allocation Id: Alloc31930
ProgramYear: 2019
Program: NSLP

Allocation Date	Last Acceptance Date	Expiration Date
1/3/2019	1/10/2019	1/15/2019

Code	Description	ENT Value	Alloc Qty	Accept Qty	Avail Qty	Handling Fee Per Case	Process Fee Per Case	Total Fees
Entitlement Commodities								
100348	CORN FRZ (A130) Size: 30 LB CTN Storage: Freezer	15.32	5	5	5	0.79	0.00	3.95
	Total Commodities	76.60		5				3.95
No Charge Commodities								
100224	PEARS SLC (A433) Size: 6/#10 CAN Storage: Dry	26.38	4	4	4	1.14	0.00	4.56
	Total No Charge	105.52		4				4.56
	Total All Commodities	$182.12		9				$8.51

[Cancel]

11. During the allocation period (between the Alloc date and the Accept Date), your agency can modify the allocation request as many times as desired. Since refused product automatically becomes available in surplus as soon as your agency clicks on the "Accept" button, the system **will only** allow modifications that are a **decrease** in the amount of product requested. Once the Accept Date has passed, no further modifications will be possible.

D. **Surplus Requests**

1. If your agency would like to request any available surplus products and amounts, click on the "Allocations" tab that is located on the School Food Authority Summary Screen.

2. Listed below and to the far right of the various tab options is an "Add Surplus" button, click on this button.

   Please note: access to the surplus screen will only be available from the **1st to the 10th** of each month. Therefore, your agency will only see and have access to the "Add Surplus" button from the 1st to the 10th of each month. If you are accessing the allocations tab outside of the 1-10th time frame, the following message will replace the "Add Surplus" button: **Surplus requests only available between the 1st and 10th.** DPI will process surplus requests to be part of the following month's order (i.e. an agency places a surplus request on September 7th. When DPI processes October orders, this surplus request becomes part of the agency's October Order).

3. This screen will list all surplus USDA Foods and amounts that are available out of the warehouse facility (Central Storage and Warehouse – Eau Claire or Madison Central Storage and Warehouse) that services your agency.

On this page the following categories are listed:

- ENT Value (Entitlement Value) – This is the amount/case that USDA paid to purchase this product. For every case that your agency requests, this value will be subtracted from your agency's total entitlement allotment. Each agency is given a yearly entitlement allotment that is based on your agency's prior year's total reimbursable NSLP meals served multiplied by the federal assistance rate, which is determined by USDA, based on Food index calculations. If the product is a bonus USDA Foods, the entitlement value will be listed, but will not be subtracted from your agency's total entitlement allotment.

- Surplus Qty (Surplus Quantity) –Based on the warehouse facility that services your agency, this is the total amount of product that is in surplus. Please note: this is the total available for this warehouse facility and not a percentage that is available to just your agency.

- Request Qty (Request Quantity) – This is the amount of product, that your agency would like to receive. **Please note:** when requesting amounts, your agency can not exceed the number that is listed in the Surplus Qty.

- Handling Fee Per Case – This is the amount/case that your agency pays for the administration, storage, and delivery (if using the state-contracted delivery system) of USDA Foods.

- Proc Fee (Processing Fee) – If this product is the result of a bulk USDA Food being processed into a finished end product through a state processing contract, a processing fee/case will also be charged.

- Total Fees – Based on the number of cases requested this is the total of the Handling Fees and the Processing Fees.

4. For any desired product, enter the desired amount in the Request Qty column. To enter the desired amount, use the tab button. This will highlight the zero that has been pre-filled and you may now enter the desired amount.

    IMPORTANT: In this surplus screen, the amount available of each product is the total amount available out of that warehouse facility. If your agency has the entitlement allotment dollars available, the system **will allow** you to take the entire surplus amount available. Therefore, please only request amounts that are reasonable for the size and servicing scope of your agency.

5. There are three different types of products available through the surplus screen.

    Entitlement USDA Foods = The entitlement value/case listed **will be** subtracted from your available yearly entitlement allotment. **Please note:** in order to request entitlement surplus USDA Foods, your agency must have remaining entitlement dollars.

    If your agency does not have sufficient entitlement dollars and your agency requests entitlement product, you will receive an error message and the system will not process the surplus request.

    Bonus USDA Foods = These are products that based on agricultural surplus, were labeled as bonus USDA Foods. The entitlement value/case listed **will not** be subtracted from your available yearly entitlement allotment.

    Entitlement No Charge USDA Foods = These are products that were originally received into the state as an entitlement USDA Food, but the state has determined that the product will be available at **no** entitlement charge. Therefore, the entitlement value/case listed **will not** be subtracted from your yearly available entitlement allotment.

    Please note: Regardless of USDA Foods type (entitlement, bonus or entitlement no charge USDA Foods), applicable handling fees for these products will be assessed when ordered.

7. Once you have completed the desired amounts, click on the "Next Page >" button that is located at the bottom of the screen. **IMPORTANT:** If you select the cancel button (that is located at the bottom of the screen) or exit out of this screen prior to selecting the "Next Button", your order **will not** be submitted and your agency **will not** receive the desired products.

8. Once you have clicked on the "Next Page >" button, your agency will be taken to the summary page of all requested products. Review all of the numbers in the "Accept Qty" column to ensure the accuracy of all numbers requested.

    If you find an error on the numbers that are reflected on this page, click on the "< Prev Page" (Previous Page) button that is located at the bottom of the screen and you will be taken back to the prior page. In order to see the "< Prev Page" button, you may have to use the scroll button that is located on the right-hand side of the screen; and scroll down to the bottom of the page.

IMPORTANT: Surplus requests **can not** be modified once submitted. So please ensure that the surplus request is accurate prior to submission. If you want to print a copy of the surplus request, click on the print button that is located at the top of the web page tool bar.

9. Once you have confirmed the accuracy of the numbers, click on the "Submit" button that is located at the bottom of the screen. (In order to see the "Submit" button, you may have to use the scroll button that is located on the right-hand side of the screen, and scroll down to the bottom of the page.) When your order has been processed, you will be taken back to the School Food Authority Summary Screen. If you want to ensure that your order has been updated, go back into the allocation tab and click on the "View" button that is located on the far right side of where the allocation is listed.

IMPORTANT: If your agency does not have sufficient entitlement dollars for the quantity requested, you will receive an error message. In order to "Submit" the surplus request, your agency will need to decrease the request to an amount that is within the available entitlement allotment that your agency has.

10. Under the allocation tab, all surplus requests begin with "Surp" under the Alloc Id (Allocation Id) column.

11. Once DPI has processed your allocation requests, your agency can view the delivery order (Typically this will completed after the 15th of the month prior to the month that you are requesting product for). All open allocations (including survey allocations, fair-share allocations and surplus requests) will be processed into one order for that particular delivery month.

    Please note: The products and quantities available through the surplus request will change as other agencies place fair-share allocation requests. Therefore, if your agency desires specific amounts of surplus items, you may want to view the surplus request screen multiple times.

V. Orders

A. General Information

1. Orders can be viewed by accessing the "Order" tab that is listed on the School Food Authority Summary Screen.

2. The following categories will be listed under the "Order" tab:

    - Order Id – For every order, the system will automatically assign an identification code.

    - Location Nbr – (Location Number) For every delivery location that is created, the system automatically assigns a number identification code to that delivery location.

    - Location Name – This is the name of your agency, as listed in this system.

    - Delivery Period – This indicates the month of delivery (i.e. Sep, 2022 is for September 2022 orders).

    - Order Status – This indicates "Invoiced" when an invoice has been created based on this order.

    - Verified Date – This indicates whether or not your agency has accessed the system to verify delivery receipt of the order. This column is only applicable to agencies using the state-contracted once per month delivery system.

3. To view a particular "Order," click on the "View" button that is located on the far right side of the desired order name. To print a copy of the order, click on the print button that is located at the top of the web page tool bar.

4. If your agency prepares meals (Prep school) for another agency(ies) [Joint school(s)], the "View" button will **only** reflect the individual order for your agency. To access the cumulative (combined order) order for your agency including Joint school order(s), click on the "Joint" button that is located on the far right side of the desired order name. If you want to print a copy of the "Joint" order, click on the print button that is located at the top of the web tool bar.

5. If you are a Prep school and you want to print a copy of the individual order for each Joint school, you will need to log into the system using the Joint agency's userid and password and follow the directions described in #1 above.

In addition, the procedures for handling the delivery orders will vary according to the delivery method selected by your agency (i.e. state delivery system or commercial distribution). Both sets of procedures are listed below. Please follow the instructions for the applicable delivery system.

B. **State Delivery System**

The following instructions apply to agencies that will be receiving deliveries through the State-contracted delivery system (currently Midwest Perishables, Inc. is providing this service).

1. Once DPI has processed the allocations into orders, your agency will need to print a copy of the order from the system to be used and signed by the trucking company when receiving in your USDA Foods order. To print a copy of the order, click on the "View" button that is located on the far right side of the desired order and then click on the print button that is located at the top of the web page tool bar.

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SFA Order Receiving Form

			Order Number:	102570
			Order Type:	State
			Order Status:	Invoiced

Deliver To:		Contact:		Order Dates:
				Ordered: 11/14/2018
				Delivery Period: Dec, 2018

Code	Description	Pack Size	Ordered Qty		Received Qty
Storage Type: Freezer					
100101	CHIX DICED (A517)	40 LB CTN	9		9
100256	STRAWBERRY CUP 4.5 (A417)	96/4.5 OZ CUP	7		7
100277	ORANGE J SNGL (A299)	70/4 OZ CTN	5		5
110462	CHICKEN STRIPS, UNBREADED, FRZ	30 LB	10		10
110473	BROCCOLI, FROZEN	30 LB	1		1
110859	MIXED BERRY, FRZ, CUP, 96/4	96/4 OZ	10		10
110861	BUTTERNUT SQUASH, DICED, IQF	6/5 LB	1		1
110931	EGG PATTY, ROUND, FROZEN	25 LB	2		2
C418	BEEF CRUMBLES, ADVANCE-TYSON	8:5 LB	12		12
C520	CHICKEN FAJITA STRIPS, PILGRIMS PRD	30 LBS	9		9
C522	CHICKEN NUG, WHOLE GRAIN, TYSON	30.6 LB CASE	9		9
C560	CHICKEN PATTIES, WG, TYSON	30.6 LB CASE	10		10
C600	PORK TACO FILLING, JTM	6:5 LB BAGS	12		12
C720	MACARONI & CHEESE, JTM	6:5 LB POUCHES	12		12
C722	CHEESE QUESADILLAS, SCHWANS	1:96 4.4 oz	12		12
			Total Cases: Freezer		121

2. If your agency prepares meals (Prep school) for another agency(ies) [Joint school(s)], the "View" button will **only** reflect the individual order for your agency. To access the cumulative (combined order) order for your agency including Joint school order(s), click on the "Joint" button that is located on the far right side of the desired order name. If you want to print a copy of the "Joint" order, click on the print button that is located at the top of the web tool bar.

3. If you are a Prep school and you want to print a copy of the individual order for each Joint school, you will need to log into the system using the Joint agency's userid and password and follow the directions described in #1 above.

4. When your agency initially views the order, the Ordered Qty and the Received Qty will be identical. Also, initially when your agency views the order, the order will state, "Not Yet Verified" at the top of the page. "Not Yet Verified" refers to whether your agency has reported

delivery shortages. "Not Yet Verified" **does not** mean that modifications can be made to the existing order.

5. When receiving in your monthly order, use the amounts listed in the Received Quantity column located on the far right-hand side of the form.

6. If your agency has a shortage/overage/damage on a particular product(s), the school personnel checking in the monthly order should have the trucker adjust the quantity listed in the Received Quantity and initial next to the adjustment. This adjustment needs to be indicated on both the school's order receiving form and the trucker's order form. Your agency must retain a copy of the signed order form on file for proof of discrepancy.

7. Both the trucker and the school personnel must sign and date both copies of the order form. The signatures are located at the bottom of the order form.

8. If the trucking company can reconcile the discrepancy, they will contact your agency to resolve the discrepancy.

9. If your agency has experienced a shortage/overage/damage that could not be reconciled by the trucking company, you will need to follow the procedures listed below:

    a. The discrepancy must be entered into the system. In order to receive the appropriate adjustment for this discrepancy, your agency **must** enter adjustments into the system by the 7th of the month following the delivery month (i.e. October 7 for September deliveries). After this deadline, **no financial adjustments will be made** to your agency's account.

    b. To enter the adjustment, click on the order tab and then click on the "Discrep" (Discrepancy) button that is listed on the far-right hand side of the desired order.

        Please note: the "Discrep" button is only used to report a delivery discrepancy. Changes made through the "Discrep" screen **do not** allow your agency to change that month's USDA Foods order. Once an order has been created by DPI, no adjustments are allowed.

    c. The system automatically pre-fills the Received Qty column with the Ordered Qty column. The only time that your agency needs to enter data into this column is when there is a delivery discrepancy.

    d. To make an adjustment on a product, use the tab button to move to the Received Quantity field for the appropriate USDA Food. This will highlight the figure that has been pre-filled and you may now enter the adjusted amount.

    e. After your agency has entered the necessary adjustments, click on the "Next Page >" button that is located at the bottom of the screen. **IMPORTANT:** If you select the cancel button (that is located at the bottom of the screen) or exit out of this screen prior to selecting the "Next Button," your adjustment **will not** be submitted and your agency **will not** receive the desired adjustment.

    f. Once you have clicked on the "Next Page >" button, your agency will be taken to the summary page of all received products. Review all of the numbers in the "Received Qty" column to ensure the accuracy of all numbers received.

    g. If you find an error on the numbers that are reflected on this page, click on the "< Prev Page" (Previous Page) button that is located at the bottom of the screen and you will be taken back to the prior page. In order to see the "Prev Page" button, you may have to use the scroll button that is located on the right-hand side of the screen; and scroll down to the bottom of the page.

h. Once you have confirmed the accuracy of the numbers, click on the "Submit" button that is located at the bottom of the screen. (In order to see the "Submit" button, you may have to use the scroll button that is located on the right-hand side of the screen; and scroll down to the bottom of the page.) When your order has been processed, you will be taken back to the School Food Authority Summary Screen. If you want to ensure that your order has been updated, go back into the order tab and click on the "View" button that is located on the far right side of where the order is listed.

i. Based on the submitted adjustments, DPI will reconcile all discrepancies with the trucking company. If the trucking company disagrees with the discrepancy(ies), the trucking company will provide a proof of delivery document to DPI.

j. Once reconciled and eligible for adjustment, your agency will receive the appropriate adjustment to your account (This includes both entitlement and applicable handling fee adjustments).

10. If your agency does not experience a delivery shortage, your agency **does not** need to access the system to verify the amounts delivered. After the 7th of the month following the delivery month (i.e. October 7 for September deliveries), the system will automatically change the order to "Verified" if no delivery shortages have been reported.

C. Commercial Distribution System

The following instructions apply to all agencies who will be receiving deliveries through a commercial distributor.

1. Once DPI has processed the allocations into orders, your agency may want to print a copy of the order from the system to compare the monthly order with the actual amounts delivered by the distributor throughout the month. To print a copy of the order, click on the "View" button that is located on the far right side of the desired order and then click on the print button that is located at the top of the web page tool bar.

FDP			Wisconsin Department of Public Instruction	
SFA Order Receiving Form				
		Order Number:	102473	
		Order Type:	State	
		Order Status:	Invoiced	
Deliver To:		Contact:	Order Dates:	
			Ordered: 11/14/2018	
			Delivery Period: Dec, 2018	

Code	Description	Pack Size	Ordered Qty		Received Qty
Storage Type: Freezer					
100256	STRAWBERRY CUP 4.5 (A417)	96/4.5 OZ CUP	3		3
100348	CORN FRZ (A130)	30 LB CTN	4		4
100350	PEAS FRZ (A160)	30 LB CTN	2		2
100351	BEANS GREEN FRZ (A070)	30 LB CTN	3		3
100352	CARROTS 30 (A099)	30 LB CTN	2		2
110624	BLUEBERRIES, HIGHBUSH	30 LB CTN	2		2
110846	STRAWBERRY, WHOLE, UNSWT IQF	6/5 LB	8		8
110859	MIXED BERRY, FRZ, CUP, 96/4	96/4 OZ	16		16
			Total Cases: Freezer		40
Storage Type: Dry					
100219	PEACHES CLING SLC (A408)	6/#10 CAN	4		4
100220	PEACHES CLING DICE (A409)	6/#10 CAN	8		8
100224	PEARS SLC (A433)	6/#10 CAN	3		3
100225	PEARS DICE (A434)	6/#10 CAN	8		8
100307	BEANS GREEN 10 (A061)	6/#10 CAN	4		4
100362	BEANS REFRIED (A085)	6/#10 CAN	1		1
			Total Cases: Dry		28
			Total Cases All Commodities		68

2. If your agency prepares meals (Prep school) for another agency(ies) [Joint school(s)], the "View" button will **only** reflect the individual order for your agency. To access the cumulative (combined order) order for your agency including Joint school order(s), click on the "Joint" button that is located on the far right side of the desired order name. If you want to print a copy of the "Joint" order, click on the print button that is located at the top of the web tool bar.

3. If you are a Prep school and you want to print a copy of the individual order for each Joint school, you will need to log into the system using the Joint agency's userid and password and follow the directions described in #1 above.

4. For agencies using a commercial distributor, the Ordered Qty and the Received Qty will be identical.

5. If your agency has a shortage/overage/damage on a particular product(s), this discrepancy must be resolved between your agency and your distributor. Please refer to the details outlined in your contract with the distributor for specific instructions on handling discrepancies. DPI will not be involved in the resolution.

VI. Invoicing

A. General Information

When an "Order" is created in the system, the system will automatically generate an applicable "Invoice" for any handling charges as a result of the "Order."

Any costs accrued through the ordering of USDA Foods, can be accessed through the "Invoicing" tab.

For monthly orders, costs will be calculated on a monthly basis. Any applicable costs, such as administrative fees, storage fees, processing fees, and delivery fees will be automatically off-set and taken from the monthly National School Lunch Program (NSLP) federal reimbursement claim.

For direct diversion processing commitments (including the Cheese Processing Program), the costs will be calculated annually, typically in August, for the upcoming school year. Any applicable costs will be automatically off-set and taken from the monthly National School Lunch Program federal reimbursement claim. The reimbursement voucher will reflect the total amount of reimbursement claim less the assessed fees.

THEREFORE, *DO NOT* SUBMIT CHECK PAYMENT FOR ANY COSTS ASSOCIATED WITH THE RECEIPT OF USDA FOODS.

B. Accessing Invoices

1. To access any applicable handling charges, click on the "Invoicing" tab that is listed on the School Food Authority Summary Screen.

2. The following categories will be listed under the "Invoicing" tab:

   - Invoice Id - For every invoice, the system will automatically assign an identification code.

   - Delivery Period – The delivery period indicates the month in which the invoice costs were accrued (i.e. Sep, 2022 would be the invoice for the September 2022 order). If the invoice is for direct diversion processing (including commitments for the Cheese Processing Program), the delivery period will be the month that DPI invoiced the applicable administrative fees (typically will be in August).

   - Invoice Type – There are two types of invoices: order invoice and order adjustment. For every order that is created, the system will automatically generate an "order invoice" for all applicable handling charges. All DPI approved credit adjustments will be indicated as an "order adjustment."

   - Invoice Amount – This is the total amount due for this particular invoice.

   - Paid Amount – As your agency submits federal reimbursement claims, any applicable fees will be offset from the federal reimbursement claim. This column will reflect how much, if any, has been taken from a federal reimbursement claim.

3. To access details of a specific invoice, click on the "View" button that is located to the right of the desired invoice.

4. On the top right-hand corner of each invoice, the following information will be displayed:

  - Invoice Number – For every invoice created, the system automatically generates an identification number.

- Delivery Period - The delivery period indicates the month in which the invoice costs were accrued (i.e. Sep, 2022 would be the invoice for the September 2022 order). If the invoice is for direct diversion processing (including commitments for the Cheese Processing Program), the delivery period will be the month that DPI invoiced the applicable administrative fees (typically will be in August).

  - Invoice Type – There are two types of invoices: order invoice and order adjustment. For every order that is created, the system will automatically generate an "order invoice" for all applicable handling charges. All DPI approved credit adjustments will be indicated as an "order adjustment."

  - Invoice Status - This indicates the status of the invoice. An "Open" status indicates that payment through the federal reimbursement claim **has not** yet occurred. A "Paid" status indicates that payment through the federal reimbursement claim **has** occurred.

  - Reference Order: This refers to the corresponding "Order Id" listed under the Order Tab. The ""Reference Order" designates the order being invoiced for. If the invoice is for direct diversion processing, the reference order section will be blank.

5. In the middle of the invoice, the "Payment History" will be displayed. The "Payment History" indicates the amount(s) of the invoice that has been recovered from a federal reimbursement claim. If the invoice amount is greater than the federal reimbursement claim, the remaining balance will be recovered from the next submitted federal reimbursement claim. If this occurs, it will be reflected in this Payment History Section. The following columns are displayed in the Payment History Section:

  - Credited Date – This is the DPI processed date that applicable fees were offset from a federal reimbursement claim.

  - Voucher – This is the voucher number of the reimbursement check/electronic transmittal for which the applicable fees were offset from.

  - Claim Date – This is the federal reimbursement monthly claim date for which the applicable fees were offset from. (For example, if the applicable USDA Foods fees were offset from the September 2022 federal reimbursement claim, the claim date would be listed as "9/1/2022.")

  - Amount – This is the amount of the fees that were offset from the applicable federal reimbursement claim.

6. Every invoice will give detailed information on the handling fees associated with each USDA Food. For each USDA Food being invoiced, the following categories will be listed:

  a. Invoice Quantity – Indicates the total number of cases ordered and invoiced.

    - Admin Fees (Administrative Fees) – This is the amount that your agency pays for the Department of Public Instruction (DPI) to handle the allocation and distribution of USDA Foods. The figure displayed in this column is the **total administrative fee** for that particular USDA Food (i.e. 10 cases of 100307, green beans ordered multiplied times .46/case administrative fee = $4.60 displayed in the administrative column for 100307).

- Processing Fees - If this product is the result of a bulk USDA Food being processed into a finished end product through a state processing contract, a processing fee will also be charged. The figure displayed in this column is the **total processing fee** for that particular USDA Food (i.e. 20 cases of C308 ordered multiplied times $39.15/case processing fee = $783.00 displayed in the processing fees column for C308). If the product was ordered through direct diversion processing, this column will be zero and does not apply.

- Storage Fees – Once USDA Foods are delivered by USDA into the state of Wisconsin, DPI has to pay the state-contracted warehouse to store the products prior to delivery to schools. This is the amount that DPI pays the contracted warehouse to store the USDA Foods. The figure displayed in this column is the total storage fee for that particular USDA Food (i.e. 10 cases of 100219, peaches ordered multiplied times $1.136/case storage fee = $11.36 displayed in the storage fees column for 100219). If the product was ordered through direct diversion processing, this column will be zero and does not apply.

- Delivery Fees – This column applies only to agencies using the state-contracted delivery. DPI has to pay the contracted warehouse to delivery USDA Foods to agencies selecting this delivery option. This is the amount that DPI pays the contracted warehouse to deliver the USDA Foods. The figure displayed in this column is the total delivery fee for that particular USDA Food (i.e. 12 cases of 100225, pears ordered multiplied times $1.2926/case delivery fee - $15.51 displayed in the delivery fees column for 100225). If the product was ordered through direct diversion processing, this column will be zero and does not apply.

b. Total Fees – Based on the number of cases/pounds requested this is the total of the all applicable fees (Administrative Fees, Processing Fee, Storage Fees, and Delivery Fees).

FDP — Wisconsin Department of Public Instruction

SFA Invoice

Invoice Number:	110798
Delivery Period: Dec, 2018	
Invoice Type:	Order Invoice
Invoice Status:	Open
Reference Order:	102473

Mailing Address: Contact:

Payment History

Credited Date	Voucher	Claim Date	Amount

Invoice Items

Product Code	Description	Pack Size	Invoice Qty	Admin Fees	Processing Fees	Storage Fees	Delivery Fees	Total Fees
Allocation: 102473 11/14/2018								
100219	PEACHES CLING SLC (A408)	6/#10 CAN	4	1.84	0.00	2.70	0.00	4.54
100220	PEACHES CLING DICE (A409)	6/#10 CAN	8	3.68	0.00	5.41	0.00	9.09
100224	PEARS SLC (A433)	6/#10 CAN	3	1.38	0.00	2.03	0.00	3.41
100225	PEARS DICE (A434)	6/#10 CAN	8	3.68	0.00	5.41	0.00	9.09
100256	STRAWBERRY CUP 4.5 (A417)	96/4.5 OZ CUP	3	0.94	0.00	1.38	0.00	2.32
100307	BEANS GREEN 10 (A061)	6/#10 CAN	4	1.84	0.00	2.70	0.00	4.54
100348	CORN FRZ (A130)	30 LB CTN	4	1.28	0.00	1.88	0.00	3.16
100350	PEAS FRZ (A160)	30 LB CTN	2	0.64	0.00	0.94	0.00	1.58
100351	BEANS GREEN FRZ (A070)	30 LB CTN	3	0.96	0.00	1.41	0.00	2.37
100352	CARROTS 30 (A099)	30 LB CTN	2	0.64	0.00	0.94	0.00	1.58
100362	BEANS REFRIED (A085)	6/#10 CAN	1	0.49	0.00	0.72	0.00	1.21
110624	BLUEBERRIES, HIGHBUSH	30 LB CTN	2	0.64	0.00	0.94	0.00	1.58
110846	STRAWBERRY, WHOLE, UNSWT IQF	6/5 LB	8	2.56	0.00	3.76	0.00	6.32
110859	MIXED BERRY, FRZ, CUP, 96/4	96/4 OZ	16	4.45	0.00	6.54	0.00	10.99
	Total Allocation		68	25.02	0.00	36.76	0.00	61.78
	Total Invoice		68	25.02	0.00	36.76	0.00	61.78

7. At the bottom of each of the above listed columns, the total cumulative fee is also indicated. This includes the total invoice amount (exception: the grand total is not listed for invoices resulting from a direct diversion processing commitment).

8. To print a copy of the invoice, click on the print button that is located at the top of the web page tool bar.

VII. Annual Commodity Allocation and Receipt Summary (CARS) Report

It is each agency's responsibility to print out and maintain a copy of the CARS report for audit purposes. The summary covers the monthly USDA Food distributions your agency received during the specified school year. This summary shows the USDA Foods received by your agency, the value of the items, and the percentage of your entitlement received.

The amount next to the line, *"Total Value Received: Entitlement, Bonus, DoD, UNPFV and Raw Product:"* is the total value of USDA Foods your agency has received for the specified school year. This amount is what your agency may need for year-end reports.

To access a copy of the CARS report:

1. Below the web tool bar and above the School Food Authority Summary portion of the system in the left-hand corner (below the outline of the state of Wisconsin), the following words are listed: Summary, Allocations, Orders, Reports, and Resources.

2. Click on the word "Reports."

3. Click on the words "CARS Report." The CARS report will now be displayed.

4. In the top right-hand corner of the CARS report, the following school specific information will be listed :

    Program Year – This is the designated Program Year for the selected CARS Report.

    Yearly Entitlement – For the designated Program Year, this is the annual entitlement available in the USDA Food internet system. **Please note:** yearly entitlement is the entitlement that has been distributed in the *Wisconsin USDA Food Ordering System*. The yearly entitlement may be more or less than the USDA determined annual entitlement (USDA published meal rate times total number meals served in the prior school year). Therefore, the yearly entitlement may not be a true indicator of the USDA determined annual entitlement.

    Actual Entitlement – For the designated Program Year, this is the actual annual entitlement that your agency was entitled to and reflects the USDA published meal rate times the total number of meals served in the prior school year.

5. At the bottom of the CARS report, the following information will be listed:

    Total Value Received: Entitlement, Bonus, DoD, UNPFV and Raw Product – For the designated Program Year, this is the total value of USDA Foods received.

    Total Percent Offered - For the designated Program Year, this is the total percentage of annual entitlement that was made available to your agency for ordering.

    Total Percent Received – For the designated Program Year, this is the total percentage of the annual entitlement that was received by your agency. **Please note:** since the yearly entitlement distributed in the system may be more or less than the USDA determined annual entitlement,

the total percent received is based on the actual entitlement and not the yearly entitlement (USDA meal rate times total number meals served in the prior school year).

6. To print a copy of the CARS report, click on the "Print" button located on the web tool bar.

VIII. Exiting the System

To exit out of the system, click on the "Logoff" button that is located at the top of the page, in the far right-hand corner of the green tool bar section.

Nondiscrimination Statement for USDA Child Nutrition Programs

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: https://www.usda.gov/sites/default/files/documents/USDA-OASCR%20P-Complaint-Form-0508-0002-508-11-28-17Fax2Mail.pdf, from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

1. **mail:**
    U.S. Department of Agriculture
    Office of the Assistant Secretary for Civil Rights
    1400 Independence Avenue, SW
    Washington, D.C. 20250-9410; or
2. **fax:**
    (833) 256-1665 or (202) 690-7442; or
3. **email:**
    program.intake@usda.gov

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