Virtual Gateway's My Account Page (MAP) Reference Guide Summary

By law, all LEAs participating in the National School Nutrition Program must utilize the direct certification process. Massachusetts requires all LEAs to conduct all direct certifications using the Executive Office of Health and Human Services (EOHHS) Virtual Gateway's My Account Page (MAP). MAP gives users the option to check for direct certification eligibility by either (1) manually entering student names or (2) uploading student names into a predefined enrollment template.

Direct Certification is the process under which LEAs certify children who are members of households receiving assistance from SNAP, TANF/TAFDC or FDPIR, as eligible for free meals without further application. Direct certification is based on information provided by the state agencies administering the SNAP, TANF/TAFDC and FDPIR programs.

Note that the Medicaid Program cannot be used as a source for direct certification.

This job aid provides users with the guidance needed to successfully upload and save a direct certification report.

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Logon to Virtual Gateway

In order to use the Virtual Gateway's My Account Page (MAP), users must log on to the Virtual Gateway (www.mass.gov/vg), from the Virtual Gateway's website, click the link Logon to Virtual Gateway, after logging on to the Virtual Gateway, and select the My Account Page (MAP) business service.

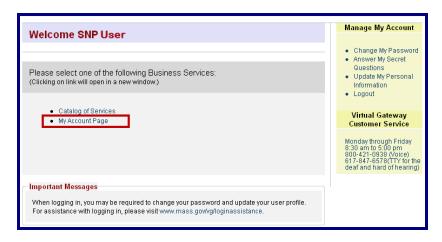
Note: See the Logon Assistance Job Aid for more information on accessing the Virtual Gateway.

Using File Upload Direct Certification

The File Upload Direct Certification provides functionality to (1) download a predefined Enrollment Template, (2) enter data into the Enrollment Template, (3) locate your saved enrollment template, and (4) upload your district's student records to see which student's are directly certified for free meals.

After the student enrollment records are uploaded, MAP performs a match process using the Department of Transitional Assistance (DTA) SNAP records. Once the Match Report is complete, you can view the results under the Match History Results tab. The Match Report provides you with a listing of students which have been identified as directly certified for free meals. The Match Report displays Exact Matches, Partial Matches and No Matches.

1. From the Virtual Gateway Business Service page, click the [My Account Page] link.



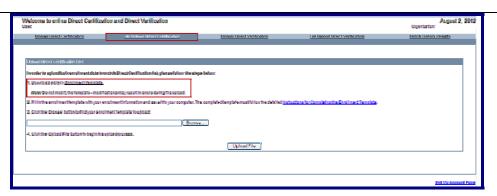
This takes you to the Online Direct Certification and Direct Verification Screen.

A) Click the [File Upload Direct Certification] tab.

Step 1: Download a Predefined Blank Enrollment Template

To begin the upload process, you must first download a blank Enrollment Template.

A. Click on the [Download Enrollment Template] link



The File Download box appears

B. Click [Save]

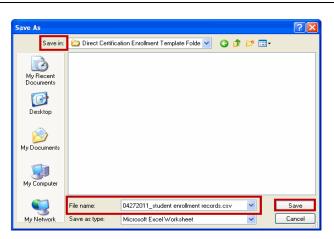


The Save As box appears.

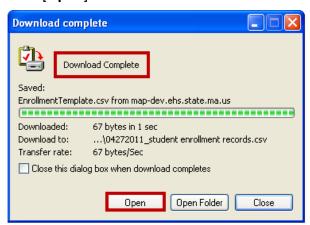
- C. Within the **Save As** box, use the Save In drop down menu to navigate to the location where you want to save the Enrollment Template. Next, type in a filename remembering to use the .csv file extension*.
 - * The File Upload feature will only accept the .CSV file extension. If you save with the .XLS extension, the file will reject when uploading.

Suggested naming conventions:

mmddyyyy.csv mmddyyyyelementaryschool.csv mmddyyyya_h.csv



- D. Once the Save in, File name, and Save as Type are complete, click the [Save] button. The Download Complete box appears.
- E. Click the [Open] button.



The Enrollment Template opens ready for data entry.

Step 2: Enter Data into the Enrollment Template

Once a blank Enrollment Template has been downloaded, student enrollment data* must be loaded. Enrollment data can either be typed directly into the blank template or you can use the copy/paste functionality from a file saved within an LEA's internal computer system.

*Districts will need to supply student data to input into the enrollment template.

For assistance in completing the Enrollment Template select the link in Step 2 Instructions for Completing Enrollment Template.



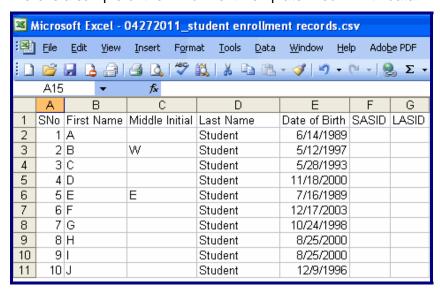
A. From within the blank Enrollment Template, fill in student enrollment data by typing or using copy/paste functions from within the school's business software (i.e. Microsoft Excel).

The following column headings are part of the Enrollment Template and cannot be modified:

- * SNo (Serial Number: 1, 2, 3, etc ...)
- * First Name (20 characters or less)
- Middle Initial (Optional)
- * Last Name (20 characters or less)
- * Date of Birth (Note: Must in the following format: mm/dd/yyyy)
- SASID (Optional Not part of SNAP/TANF/TAFDC match process)
- LASID (Optional Not part of SNAP/TANF/TAFDC match process)

For the purpose of this reference guide, we have indicated the required fields with an asterisk symbol (*). Fields not denoted with an asterisk are optional fields.

Here is a sample of the Enrollment Template filled in with data:



Important Reminders:

- You cannot change the names of the column headings or add additional fields on the enrollment template. This will cause the file to reject during the upload process.
- Please note that the maximum allowable file size is 3 MB and the maximum allowable row count is 15000 per file upload.
- A. Once the data is entered into the Enrollment Template, save the file. Remember that a completed enrollment template **must be saved in the .csv file format** in order to be successfully uploaded into MAP.

The following dialog box will appear since you are saving the file in .csv format. Select [Yes] to retain the .csv file format.

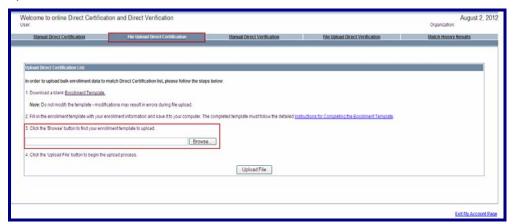


B. Follow Step 2: A-B as outlined above for each template that you need to create. Based on the size of your school district, you may have more than one file to create and upload.

Please note that you will need to return to MAP and select the File Upload Direct Certification tab to begin the upload the process.

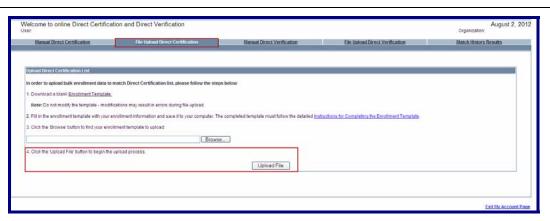
Step 3: Browse to Locate Your Completed Enrollment Template

A. Click the click [**Browse**] button and locate your completed enrollment template that needs to be uploaded.

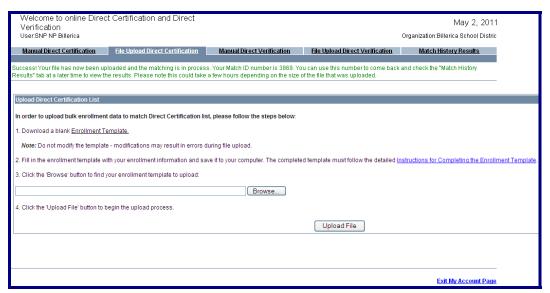


Step 4: Upload the Enrollment Data

A. Click [Upload File] to begin the upload process.



The following message will appear once the Match Process has been successfully uploaded: "Success! Your file has now been uploaded and the matching is in process. Your Match ID number is xxxx. You can use this number to come back and check the "Match History Results" tab at a later time to view the results. Please note this could take a few hours depending on the size of the file that was uploaded."



A. Repeat the Steps 3 and 4 for each enrollment template that you need to upload.

Refer to Key to Understanding Direct Certification and Direct Verification Error Messages and Known System Issues for VG SNP Manual Direct Certification and Direct Verification reference guides for guidance on understanding error messages when uploading a file.

Using Manual Direct Certification

Manual Certification allows you to directly enter student data, rather than uploading through the Enrollment Template.

From the Welcome to Online Direct Certification and Direct Verification page:

Department of Elementary and Secondary Education (DESE)

1. Click the [Manual Direct Certification] tab.



This takes you to the Search Direct Certification List screen where you can directly enter your district's student enrollment data to determine which student's are directly certified for free meals. You can check the eligibility of up to ten (10) students at time.

The column headings are the same as you saw when using the File Upload Direct Certification Enrollment Template. Note that the required fields on the Manual Direct Certification page are denoted with an asterisk (*) symbol.

- Row # (Note that 10 is the maximum per page)
- First Name*
- Middle Initial (Optional)
- Last Name*
- Date of Birth* (Note: Must in the following format: mm/dd/yyyy)
- SASID (Optional Not part of SNAP/TANF/TAFDC match process)
- LASID (Optional Not part of SNAP/TANF/TAFDC match process)
- 2. Enter search criteria using student data. Use the following steps:
 - A. Type [First Name].
 - B. Type [Middle Initial], if provided.
 - C. Type [Last Name]
 - D. Type [Date of Birth]. (Using the following format: mm/dd/yyyy)
 - E. Type [Statewide Student Identification Code (SASID)], if provided.
 - F. Type [Locally Assisted Student Identifier (LASID)], if provided
- 3. Once all students are entered, click [Search]



MAP begins a match process using the Department of Transitional Assistance (DTA) SNAP records. Once the Match Report is complete, the results are available either directly below the Search the Direct Certification List or under the Match History Results tab. The Match Report provides a listing of students which have been identified as directly certified for free meals. The Match Report will display Exact Matches, Partial Matches and No Matches.

Once the Manual Direct Certification process is complete, the Match Results will display at the bottom of the page. Here is a sample of what the Match Results look like when running a Manual Direct Certification.

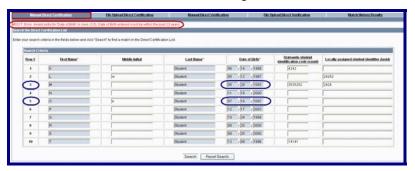


Refer to Key to Understanding Direct Certification and Direct Verification Error Messages and Known System Issues for VG SNP Manual Direct Certification and Direct Verification reference guides for guidance on understanding error messages when uploading a file.

Important: There will be times when you receive error messages surrounding the data that you input. Here is an example of an error message that you may encounter.

"Error Message: M0317: Error. Invalid entry for 'Date of Birth' in rows (3,5). Date of Birth entered must be within the past 22 years."

In this example, the student names and data associated with rows 3 and 5 have a date of birth that makes the student older than 22 and not eligible for the School Nutrition Program.



To correct this error and allow the Match Processing to continue, verify the data entered on those rows and correct the date of birth, if entered incorrectly, or remove if the date of birth was entered correctly since those students are no longer eligible to participate in this program.

Once the corrections are made, click [Search] to start the match process again.

Refer to Key to Understanding Direct Certification and Direct Verification Error Messages and Known System Issues for VG SNP Manual Direct Certification and Direct Verification reference guides for guidance on understanding error messages when uploading a file.

Searching and Viewing Match History Results

The Match History Results tab allows you to search for and view both manually entered and uploaded enrollment data for both Direct Certification and Direct Verification.

The results remain under this tab for 18 months and are then archived. It is recommended that you save the results to your local computer for review and audit purposes. If you need to retrieve Match History Results greater than 18 months, contact the Department of Elementary and Secondary Education for assistance.

From the Welcome to online Direct Certification and Direct Verification page:

Conducting a Search

1. Click the [Match History Results] tab.

The Search Criteria screen appears



The Search Criteria Screen allows you to search for results using any combination of the following fields:

- Date From (format: mm/dd/yyyy)
- Date To (format: mm/dd/yyyy)
- Match ID (ID is listed on the Manual Direct Certification, File Upload Direct Certification, Manual Direct Verification, and File Upload Direct Verification pages after successful submission of data.)
- Manual/File (Indicates how data was submitted)
- Certification/Verification (Indicates which type of results you wish to view)

Note: The search, viewing and saving processes on the Match History Results page works the same for both Direct Certification and Direct Verification results.

A. Enter Search Criteria

Example One: Search by a Submitted Date Range

- 1. Click in the [From:] field
 - a. Type in [Month] (format MM) field
 - b. Type in [Day] (format DD) field
 - c. Type in [Year] (format YYYY) field
- 2. Click in the [To:] field
 - a. Type in [Month] (format MM) field
 - b. Type in [Day] (format DD) field
 - c. Type in [Year] (format YYYY) field
- 3. Select [Manual or File] from menu options
- 4. Select [Certification or Verification] from menu options



Example Two: To search by a Match ID

1. Type in [Match ID].

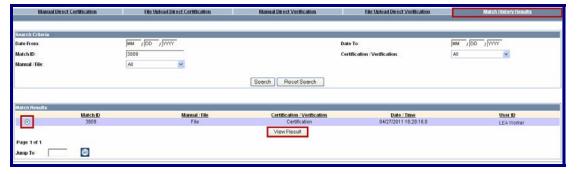


Complete search criteria and click [Search].

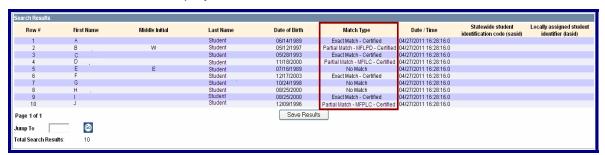
Viewing Search Results

Once the search is complete, the results are viewed using the following steps:

- 1. From the Match Results screen, select the radio button under Match Results
- 2. Click [View Results]



The Search Results will displays.



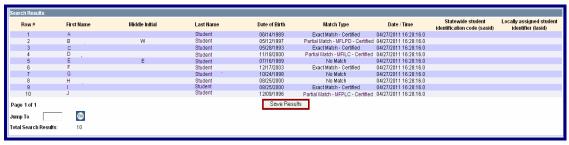
Refer to **Key to Understanding Direct Certification and Direct Verification Match History Results** in this job aid for guidance on understanding the Match Type results.

Saving Match History Results

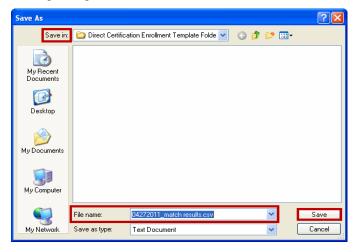
The results remain under this tab for 18 months and are then archived. It is recommended that you save the results to your local computer for review and audit purposes. If you need to retrieve Match History Results greater than 18 months, contact your ESE Reviewer at the Department of Elementary and Secondary Education for assistance.

To save the results to your local computer/network:

1. From the Search Results screen, click [Save Results]



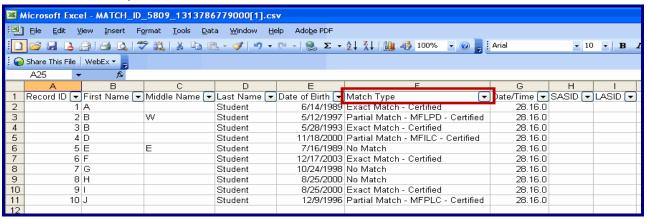
- 2. Click [Save] from the File Download box
- 3. Within the **Save As** dialog box, use the Save In drop down menu to navigate to the location where you want to save the results. Next, type in a filename remembering to use the .csv file extension.
- 4. Click [Save]



Here is a sample of a saved Match Results file:

	А	В	С	D	Е	F	G	Н	
1	Record ID	First Name	Middle Name	Last Name	Date of Birth	Match Type	Date/Time	SASID	LASID
2	1	Α		Student	6/14/1989	Exact Match - Certified	28:16.0		
3	2	В	W	Student	5/12/1997	Partial Match - MFLPD - Certified	28:16.0		
4	3	С		Student	5/28/1993	Exact Match - Certified	28:16.0		
5	4	D		Student	11/18/2000	Partial Match - MFILC - Certified	28:16.0		
6	5	Е	E	Student	7/16/1989	No Match	28:16.0		
7	6	F		Student	12/17/2003	Exact Match - Certified	28:16.0		
8	7	G		Student	10/24/1998	No Match	28:16.0		
9	8	Н		Student	8/25/2000	No Match	28:16.0		
10	9			Student	8/25/2000	Exact Match - Certified	28:16.0		
11	10	J		Student	12/9/1996	Partial Match - MFPLC - Certified	28:16.0		
40									

Once the results are in Excel you can sort, filter and format just as you would any other spreadsheet. A suggestion is turn on the *Auto Filter* functionality from within Excel in order to filter the results. The filtered results can be saved as separate files for later use.



Additional Learning Opportunities

- 403 Using My Account Page (MAP) for Direct Certification and Direct Verification CBT To take online course, log into <u>PACE</u>.
- **Bookmark our Site**: www.mass.gov/vg/snp for a complete listing of Virtual Gateway School Nutrition Reference Guides.

Questions or Need Assistance when logged into the Virtual Gateway?

Call Virtual Gateway Customer Service
1-800-421-0938 (617-984-6578 - TTY for the deaf and hard of hearing)
8:30 am to 5:00 pm Monday through Friday

Department of Elementary and Secondary Education (DESE)

Questions or Need Assistance with Training for the School Nutrition Program?

Call Department of Elementary and Secondary Education PACE Site Administrator 1-781-338-6113 or 1-781-338-6110 8:30 am to 4:00 pm Monday through Friday

Key to Understanding Direct Certification and Direct Verification Match History Results

Direct Certification Outcomes (SNAP / TAFDC Match)					
#	Possible Outcomes				
1	Exact Match – Certified				
2	Partial Match - MFILC - Certified				
3	 3 Partial Match - MFLPD – Certified 4 Partial Match - MFPLC – Certified 				
4					
5	No Match *				

Possible Outcomes:

Exact Match: Exact match on all data provided

MFILC condition: Match on First Initial, Last Name and DOB

MFLPD condition: Match on First Name, Last Name and Partial DOB

(2 out of 3 Date fields should match)

MFPLC condition: Match on First Name, Partial Last Name (first 4 letters) and DOB

No Match *: No match found based on data provided

NOTE: If a duplicate match was found for Direct Certification or as part of the SNAP / TAFDC match during Direct Verification, then we will follow the normal process for matching (as if they weren't a duplicate) and display the Match Type accordingly from the values above.

^{*} Since no match was found against SNAP / TAFDC data, this would go further for Medicaid Match and the possible outcomes are as shown under the Direct Verification Outcomes (Medicaid Match).

Key to Understanding Direct Certification and Direct Verification Error Messages

Functionality	Scenario	Expected Error Message
Manual Direct Certification Manual Direct Verification	When 'Search' button is clicked under 'Manual Direct Certification' or 'Manual Direct Verification' tab without entering any information on the page.	M0330: Error. Please enter First Name, Last Name and Date of Birth for at least 1 row in order to proceed.
Manual Direct Certification Manual Direct Verification	When invalid data (eg. alphabetic character) is entered for 'Statewide student identification code (sasid)' OR 'Locally assigned student identifier (lasid)' under 'Manual Direct Certification' or 'Manual Direct Verification'.	M0315: Error. Invalid entry for '~' in rows (~). Please enter a numeric value.
Manual Direct Certification Manual Direct Verification	When invalid data (eg. numeric character) is entered for 'Middle Initial' under 'Manual Direct Certification' or 'Manual Direct Verification'.	M0316: Error. Invalid entry for '~' in rows (~, ~, ~). Please enter alphabetic characters only.
Manual Direct Certification Manual Direct Verification	When DOB > 22 years is enter under 'Manual Direct Certification' or 'Manual Direct Verification'.	M0317: Error. Invalid entry for '~' in rows (~, ~, ~). Date of Birth entered must be within the past 22 years.
Manual Direct Certification Manual Direct Verification	When invalid data is entered in the mandatory fields (such as First Name, Last Name etc.) under 'Manual Direct Certification' or 'Manual Direct Verification'.	M0314: Error. The following rows have incomplete or incorrect data (~, ~). Please remember each row must contain a First Name, Last Name and Date of Birth. Names can only contain letters and the following characters (hyphen, space, apostrophe). Date of Birth should be in the format MM/DD/YYYY.
File Upload Direct Certification File Upload Direct Verification	When the 'Upload File' button is clicked under 'File Upload Direct Certification' or 'File Upload Direct Verification' without choosing the file to upload.	M0318: Error. Please select a file for upload by clicking the 'Browse' button.
File Upload Direct Certification	When a Direct Certification file containing errors in the mandatory fields (such as First Name, Last Name etc.) is uploaded, this error message indicates the row numbers with the incorrect data.	M0331: Error. An error occurred while processing your file. The following rows in the file have incomplete or incorrect data (~). Please remember each row must contain a Serial Number, First Name, Last Name and Date of Birth. Names can only contain letters and the following characters (hyphen, space, apostrophe). Date of Birth should be in the format MM/DD/YYYY and should be in the past 22 years.
File Upload Direct Certification File Upload Direct Verification	When a Direct Certification or Direct Verification file containing errors in the non- mandatory fields (such as Middle Initial, Statewide student identification code (sasid) etc.) is uploaded, this error message indicates the row numbers with the incorrect data.	M0334: Error. An error occurred while processing your file. The following rows in the file have incomplete or incorrect data (~, ~). Middle Initial can only contain alphabetic character. Lasid and Sasid can only contain numeric values. Sasid should not exceed 10 digits and Lasid should not exceed 32 digits.

Functionality	Scenario	Expected Error Message
File Upload Direct Verification	When a Direct Verification file containing errors in the mandatory fields (such as First Name, Last Name etc.) is uploaded, this error message indicates the row numbers with the incorrect data.	M0329: Error. An error occurred while processing your file. The following rows in the file have incomplete or incorrect data (~). Please remember each row must contain a Serial number, First Name, Last Name, Date of Birth and Program Status. Names can only contain letters and the following characters (hyphen, space, apostrophe). Date of Birth should be in the format MM/DD/YYYY and should be either 'F' for free or 'R' for reduced.
File Upload Direct Certification	When the Direct Certification file being uploaded is not in the expected format.	M0333: Please upload a file in CSV format using the Enrollment Template for filling your enrollment data. Please ensure that the file size does not exceed 3 MB and the row count does not exceed 15000 rows.
File Upload Direct Verification	When the Direct Verification file being uploaded is not in the expected format.	M0333: Please upload a file in CSV format using the Enrollment Template for filling your enrollment data. Please ensure that the file size does not exceed 1 MB and the row count does not exceed 5000 rows.
Match History Results	When 'View Results' button under 'Match Results' section is clicked without choosing a record.	M0319: Error. Please choose the record you want to view the results for.
Match History Results	When invalid data (eg. alphabetic character) is entered for 'Match ID' under 'Search Criteria' section.	M0009: Error. Invalid entry for 'Match ID'. Please enter a numeric value.
Match History Results	When invalid data (eg. alphabetic character) is entered for Date fields under 'Search Criteria' section.	M0013: Error. Invalid entry for '~'. Please enter a numeric date in the following format: MM/DD/YYYY.
Match History Results	When only one of the dates are entered under 'Search Criteria' section.	M0226: Error. 'Date To' is a required field if 'Date From' value is entered.
Match History Results	When the page number mentioned in the 'Jump To' box is more than the last page value. This is applicable to the 'Jump to' field under both 'Match Results' and 'Search Results' sections. Eg. Page 1 to 5 is returned, but Jump To = Page 7, then on clicking 'Go' button, this error message is shown.	M0337: Error. Please enter a numeric value for the page number which should be less than or equal to the highest page number.