FORMAT TIPS

Entering Applications: When using a District file

- With each NEW application click on "Applications"

- Put your cursor in the open box below "lookup" and type in the First student's **last name** on the application and click "search"

- If the student appears in the lookup results, you can see that he/she already has an application on file

- If you receive a message "no results found", click on "search data available to import" key

- Find your student and click on their name

- To let the system automatically generate a family #, hit "import"

- A message appears click "ok" to allow system to generate family # or cancel to manually assign yourself

- Once you have the student on the screen click on the "save" key

- Look at the tabs on the top of the screen Family, Member, Student you are currently on the "student" tab we need to work from left to right so click on the "family" tab, if a message appears click "ok" to save

- On the "family" tab verify the information is correct. Make any changes. Two fields that you need to check and make changes to are, Household size and language

- Manually enter the household size and change the language to "English", then click "save"

- Click on "member" tab

- Now on this tab you **must** enter, THE SIGNER and/or anyone that is listed with income.

- Complete all the fields that you have information for, if this member has income click "save", next click "income" key. A box will pop up where the income may be added. Fill in the fields for each income as listed on the actual application. Click "save". If you have more that one source listed for the member you are working on, simply keep adding all sources. When done with this member's income click "close"

- To add another member click on the "new" key and enter their information. Follow the previous step to enter income. If they do not give a ssn make sure to check the box next to "no SSN".

- If you have a student that is listed with income, you can enter their income from the student tab. This is the best way to do

- Next click on "student" tab. The student you pulled up first should be displayed. Make any necessary changes to their information. Be sure to enter a signer, to do this click on the down arrow and find the member that signed the app. Click on their name. Change the app date, if needed. The **app date** will always default to today's date. Clicks "save" when finished.

- Now the student's information will show approval type and current status. (student snapshot in upper right corner)
- "History" key will show everything that occurred with the student's app. The most current letter will be on top. This will be the letter to be generated/printed. If a letter was already sent it will have a batch number displayed (batch number's are assigned as the letter sent followed by the date sent).
- To add another student to **this family application, stay on the student tab**; click the "new" key and lookup the next student**. (REPEAT for each additional student)**
- Find the student, click on their name, DO NOT HIT THE IMPORT KEY, instead click on "use current family #" key.
- Verify all info is correct, check that signer name is correct, SAVE. You will see all students on the "student snapshot" displayed.

ALL Homeless, Runaway, Migrant students must be checked as Direct Cert.

ALL foster students must only have one person in household size. If you enter a member as the signer, they must be marked as inactive. To inactivate, uncheck the active box on the member tab.

Special statuses include F- foster
                                    E-emancipated
                                    I-institutionalized

- If you need to change a student to another application, click on applications, to get a fresh screen. Tab through the family number, and enter the family information (address, phone, household size, language) Program will automatically assign the next available number. SAVE, look at family number assigned, you will need this number to change the student to this family number.
- Next, click on student tab and search for student
- Click on student's name, you must be on the student tab. When the student is displayed on screen, **manually** change family number. This will be the number from the application you created previously.