

eFORMAT Parent Portal User Guide Electronic Free or Reduced Meal Application Tracking

Welcome to the eFORMAT Parent Portal. In just a few steps, you can create a Free and Reduced Meal application for your family members. Listed below are the steps you will need to complete to create a Parent Portal account and the steps needed to create an application.

Step 1

- To create a parent user account, click on "New User Registration".



Step 2

- Click on the arrow by "I am a" and select "Parent".
- Click "Next".

Step 3

- Enter your first and last name.
- Enter your email address, if any.
- Enter your student's Student ID number.
- Enter your student's first and last name.
- Click "Finish"

NOTE: You must enter your student's Student ID, first name, and last name exactly as it is recorded in the Student Information System to successfully create a login account.

Step 4

- Enter a user ID for your account.
- Enter a password which meets all the following requirements:
 - The password must contain a number
 - The password must contain a lowercase letter
 - The password must contain an uppercase letter
 - The password must be between 8 and 20 characters long

NOTE: As the requirements for passwords may vary, please follow the password rules for your district.

- Enter a security question that can be used to verify your identity if you need to reset your password in the future. For example, the name of your first car or where you grew up.
- Click "Continue" when all required fields have been entered.

Step 5

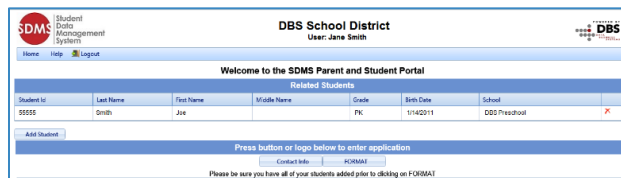
- You will now see the site's login screen.

- Enter your user ID that you created in Step 4.
- Enter your password that you created in Step 4.
- Click “Log In”.

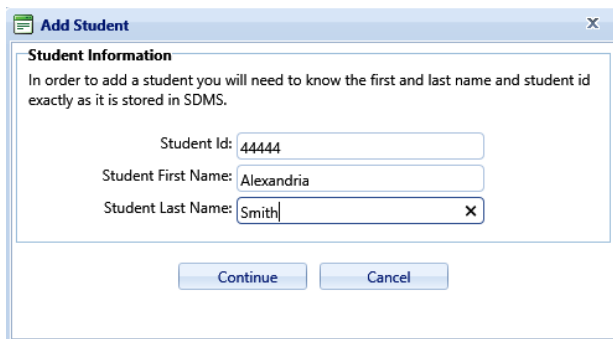


Step 6

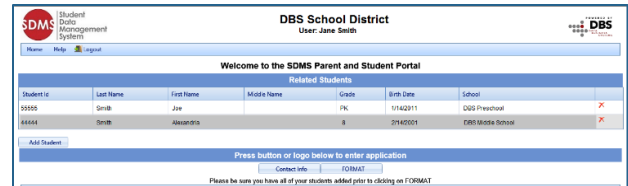
- The Welcome screen you are viewing now lists the students that are related to you in SDMS. The child listed as part of the enrollment process is listed.
- It is important to be sure all your family members are listed on this screen. If they are not listed here, you will not be able to include them in the application.



- To add additional family members, click the “Add Student” button.
- If you do not need to add additional family members, proceed to Step 7.
- In the pop-up screen, enter the student's Student ID, first name, and last name.
- Click “Continue”.

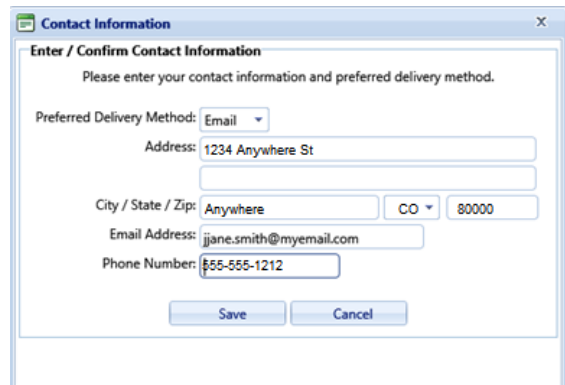


- The student will now appear in the list.



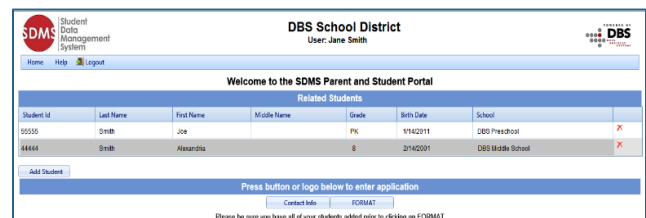
Step 7

- Click on the “Contact Info” button.
- You are required to enter your contact information on this screen before you can complete an application.
- The address information is required.
- An email address is required if you prefer to receive electronic correspondence instead of regular mail.
- Click “Save” when all information has been entered.



Step 8

- You will be returned to the Welcome screen and are ready to enter an application.
- Click on the “FORMAT” button.



- Click the button next to “Create New Application”.
- Click “Continue”.

Step 9

- In this step, you will see all patrons who are part of your family.
- Checking the box next to the name will add them to the new application you are creating.
- Click “Next”.

Step 10

- In this screen, you will see your name listed, as well as additional guardians or members of your family that were included on prior applications.
- Your name is checked by default.
- You will need to check any additional members you would like to be included on the application.
- Click “Next”.

Step 11

- This screen contains required information for each student and member.
- If the student receives any type of assistance, use the drop to choose the type or choose “None of These”.
- For the assistance type, you must enter your case number.
- All fields must have a response to proceed to the next screen.
- You will be required to fill out the information for each member listed on the left side of the screen.
- Click “Next” to proceed through each student’s screen.

- The member screen requires a response to assistance type and income.
- If a member receives any type of assistance, use the drop-down to choose the type or choose “None of These”.
- If you choose “Yes” for the assistance type, you must enter your case number.
- If any member has income, click “Yes” by “Earns Income”.
- You must enter the amount and frequency for at least one income category.
- You must choose how frequently you receive the income: weekly, every two weeks, monthly, or annually if that option is available.
- All fields must have a response to proceed to the next screen
- Click “Finish” when all information for all members has been entered.

Step 12

- The screen displays the required statements associated with your application process.
- The contents of the screen are listed below for your convenience.
- Read the entire disclosure and click "Continue" when finished.

Step 13

- The next screen contains detailed information on how to correctly report benefits and income, along with a detailed definition of each benefit/income type.
- The contents of the screen are listed below for your convenience.
- Click "Continue".

Step 14

- In this screen, your students are listed and show the Free and Reduced options that you selected in the members' screens in Step 11.
- If you wish to change any information, click on the Pencil icon next to the appropriate student's name.

- In this screen, you can edit your student's information.
- Make any desired changes.
- Click "Update" to save your changes.
- If you need to edit another student, click on the Pencil icon and repeat these steps.

- If you need to add an additional student to the application, click the "Add Available Student" button.

- The pop-up box will list any student that is a family member or was included on a previous application.

- Click the checkbox next to the student's name to be added to the application and click "Add Selected".
- The newly added student will now appear in the list.
- Click "Continue" when all changes are complete.

Step 15

- On this screen, your members are listed.
- To edit an existing member, click the Pencil icon.
- Repeat the steps you followed in Step 14, being sure to click "Update" when all changes are complete.

- If you need to add an additional member, click the “Add Application Member” button.

- On the edit screen, enter the first and last name of the member.
- Enter all required information including choosing the assistance type.
- Enter income information if you choose “Yes” by “Earns Income”.
- Enter the amount and frequency of the income.
- Click “Insert” to add the member to the application.

- You will now see the newly added member in the list of application members.
- Click “Continue”.

Step 16

- If all students and guardians have been added to the application, you are now ready to electronically sign the application.

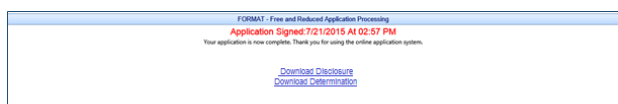
- You will need to enter the last 4 digits of your Social Security Number or click the checkbox “No SSN/Not Applicable”.
- Choose the language, English or Spanish, you prefer to receive correspondence in that will be generated from this application.
- You will enter the password you specified for when you registered for your account.
- When all information has been entered, click “Sign Application” to complete the process.

Step 17

- If your school district uses disclosure choices, you are given the opportunity to select them in this screen.
- By checking Opt-In beside a program, you are allowing meal status information to be disclosed to that program.
- You can check Opt-In in the title bar to select all programs at once.
- To use these same disclosure choices for all students on the application, check the box highlighted in red below.
- Click “Save” when completed.

Step 18

- You will now see the Confirmation screen which shows that you have successfully signed your application.
- At this point, the application is complete.
- If your district uses Disclosure Choices, you can download the Disclosure Letter which will indicate what programs you chose to Opt-In for each student on the application by clicking the “Download Disclosure” link.
- You can download the Determination Letter which will indicate the students included on the application, the meal status for each student, and contact information if you have any questions or issues about your students’ benefits.

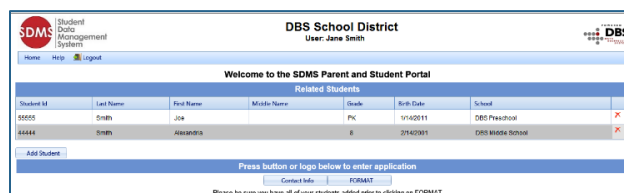


- You will be prompted to open or save each letter.



Step 19

- To return to the Welcome screen, click the “Home” button.

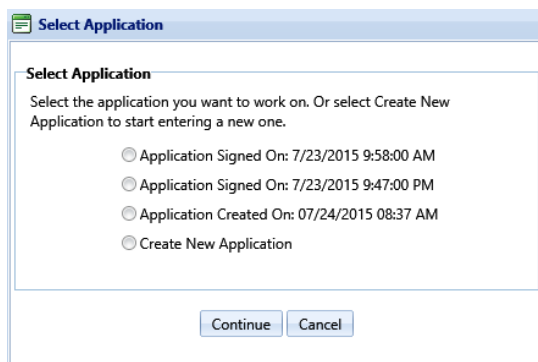


Step 20

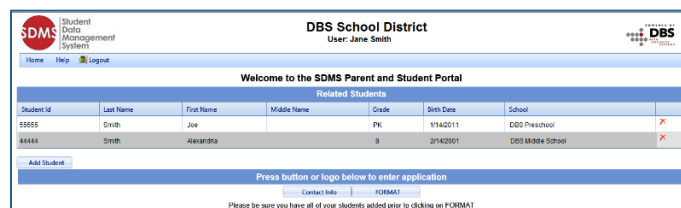
- If you want to create a new application or view the signed application you just completed, click on the FORMAT button.
- The screen will list all applications and give you the option to create a new application.
- If you choose to create a new application, check the button next to “Create New Application” and click “Continue”. Refer back to Step 9.
- If you choose to continue an application that you created, but did not sign, click the button next to “Application

Created....” and click “Continue”. Refer to Step 12.

- If you choose to review a signed application, check the button next to “Application Signed...” and click “Continue”. Proceed to Step 21.
- Click “Cancel” to exit the screen and return to the Welcome screen.



- Click “Logout” to end your session.



Step 21

- If the application has been signed, you will see the screen displayed below.



- This screen shows all students included on the application, their determination status, and income related data.
- You can print the application by clicking on “Print Application” in the upper right hand corner of the screen.
- You can also print the Determination letter by clicking on “Print

Determination” if you did not print it in Step 18.

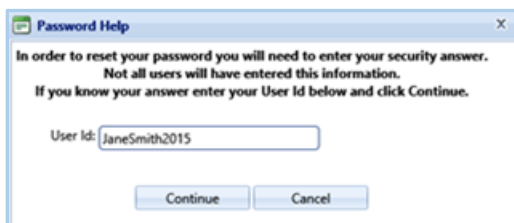
- You can decline the benefits provided on this application by clicking the “Decline Benefits” button. This will cause the application to be disregarded when determining the student’s meal status.
- You will be required to submit a new application to re-apply for benefits.

Password Recovery

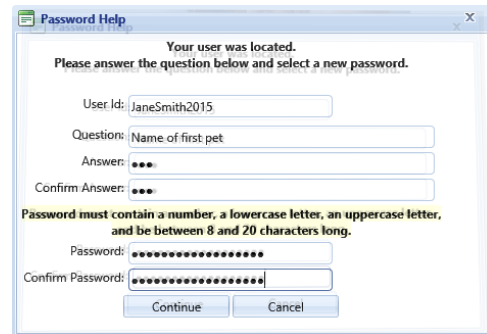
- If you forget your password, you can click “Password Recovery” from the main login screen to start the reset process.



- You will be prompted to enter your user ID you created in Step 4.



- Once your user name is confirmed in the system, the next screen prompts you to answer the security question you created in Step 4.
- You can then enter your new password.



- If you have entered the correct information, clicking “Continue” will take you back to the site’s login screen.
- Enter your user ID and newly created password to access the application Welcome screen.

