



FORMS

This routine will reset your students for the new school year and allow you to process new applications.

1. Login to F.O.R.M.S.
2. Select Database
3. Select “New School Year”
4. Select **Yes** to proceed (If you receive a second prompt, Select **No**, “You do not want to start with a blank database.”)

NOTE: *This routine may take several minutes to complete and will accomplish the following:*

- *Deletes applications without a student assigned*
- *Resets verifying official’s signature as unsigned*
- *Reset Approval Denial Letters*
- *Clears out polling information*

5. Select Database
6. Select “Flush Invalid Records”- *Clears out any Households with a 0 id.*
7. Select “Launch FSS Admin” and then login
8. Select your district on the District tab
9. Select the Options Tab or FORMS Settings depending on your version.
10. Change the start and end dates for “**FORMS** Application Dates”.
 - The end date should be set first. The end date should be the 30th school day, unless otherwise specified by the Department of Education
 - The start date for FORMS should be July 1st or the beginning of your fiscal year.

**Any application with a signed date prior to the start date, will be considered a Carryover.*

11. Import the new income guidelines into the FORMS package. Use the instructions appropriate to your version of FSS.

Advantage version

- a. This file may be obtained by going to our download page at <http://download.foodserve.com>.
- b. Select FORMS Eligibility Guidelines and save the file on your desktop.
- c. Go to Database—Import Income Guidelines, search the file saved on your desktop and select import.
- d. Go to the Income Guidelines in FORMS and check to make sure they updated. If not, call us for assistance.

SQL version 4.0.1.14 or higher:

- a. Select Database—Download/Import Income Guidelines. A message will appear notifying you of the success of the download.
- b. Select OK to close the message box then Select **Import** when the **Import Income Guidelines** box pops up.
- c. You will receive a message notifying you that the import was successful.



d. If the download fails and the income guidelines were not updated; follow the steps above (A-D)

12. In the FORMS package, you are now ready to enter the Direct Cert. Students.

You can import the direct cert list by state assigned ID or social security numbers. Please call for assistance.

Manually Entering Direct Certs:

1. Log into FORMS and select Data Entry or Application Entry
2. Select Direct Cert Entry or Certification Entry, to display the direct cert entry window which already has All Schools selected.
3. Click on the search button, top right, to bring up a list of all students, in alphabetical order.
 - If a student on the list was previously direct certified, you must uncheck the Certified box and **recheck it**. You will see a check mark appear in the *Modified column.(SQL Version)*
 - If the student on the list already has a household ID, click the box in the Certified column.
 - If the student does not have a household ID, click the box in the Certified column.

****Students that are on the direct cert list do not have to have an application on file. If they submit one, please file it; do not enter it in FORMS.***

4. When you have completed this list, select Save. This will assign all students selected, a -1 householdID and the present signed date.

**** You may receive a message that says you are about to remove students from a household, are you sure you want to reassign them Click Yes to ALL.***

5. **Do not do anything with the students who were direct cert last year but are not on this year's list. Their status will expire at the cut off date unless they submit an application. Be sure to enter the applications for the carry over direct cert students.**
6. Print Direct Cert Approval denial letters. Close Application entry and Click on Reports→Direct Cert Approval/Denial Letters or Click Reports→Approval Denial Letters. Select Direct Certification then Execute.
7. To Import Direct Cert students, follow the procedure as instructed in the Import Direct Cert Document. This document can do located on download.foodserve.com.