Electronic Disqualified Recipient System

eDRS

User's Guide

USDA
United States Department of Agriculture
Food and Nutrition Service

Table of Contents

Table of Figures

1 Introduction

This document provides a guide for using the Electronic Disqualified Recipient System (eDRS). It details how to use the functionality provided by the system and will be updated periodically to reflect any changed system or program requirements. This document is organized into the following sections:

- Preparing to Use eDRS

- Accessing eDRS

- Performing Online Queries

- Performing Ad Hoc Queries

- Conducting Secondary Verification

- Searching Profiles/Contacts

- Adding, Modifying, or Deleting Disqualifications

- Approving Disqualifications

- Generating Reports

- Accessing Help

- Logging Out

eDRS provides authorized users with a single, user-friendly and web-based interface for accessing the most up-to-date and comprehensive data on disqualified member of a household receiving nutrition supplemental nutrition assistance program benefits. This system centralizes and improves upon the earlier Disqualified Recipient System (DRS), which was deployed in 1991 as the first available national database system to support the collection and management of data on disqualified member of a household receiving nutrition supplemental nutrition assistance program benefits throughout the United States. The DRS was decommissioned in March of 2007. With the new eDRS system, users can conveniently and securely access information from their own personal computers (PCs) and can perform all necessary functions related to disqualification data through one website.

The long-term vision for eDRS is that it will be the single, most comprehensive and timely resource for Supplemental Nutrition Assistance Program disqualification record keeping. Users of eDRS will span all 52 states and territories, Food and Nutrition Service (FNS) Headquarters, and the seven regional offices that administer the Supplemental Nutrition Assistance Program.

This user guide is designed to help the following four types of "Business Users" access and use eDRS to fulfill their unique job responsibilities related to tracking disqualified member of a household receiving nutrition supplemental nutrition assistance program benefits.

- *Fraud Investigators* – Responsible for investigating alleged fraud cases and, upon confirmation of fraud, assigning disqualification penalties.

- *Supplemental Nutrition Assistance Program Eligibility Workers* – Responsible for processing Supplemental Nutrition Assistance Program applications and ensuring that individuals with active disqualification penalties are not granted benefits.

- *Locality Contacts* – Responsible for verifying prior fraud infractions in a given jurisdiction when an individual has been identified as committing fraud in another jurisdiction.

- *Quality Control (QC) Reviewers* – Responsible for conducting periodic quality control reviews of State Supplemental Nutrition Assistance Program eligibility determinations, which includes crosschecking to ensure current Supplemental Nutrition Assistance Program members were not in disqualification status as of the review date.

A separate Administrator's Guide was created to support those users who will be responsible for administering and maintaining the eDRS.

2 Preparing to Use eDRS

This chapter describes the configuration required to run the eDRS application and how to configure your browser in order to best utilize the system.

2.1 Minimum PC Configuration

The following represents the minimum PC configuration requirements for running the eDRS application:

- Hard Disk: 1 GB free space (Recommended)

- RAM: 64 MB

- Default Monitor Resolution: 800 x 600 and higher

- Default Client Operating System: Win 9X/NT/2000/XP - 32-bit machine

- Speed: 56.6 Kbps (Recommended)

- Browser: 128 bit cipher strength, including:

    - Netscape 6.0 (or greater)
    - Internet Explorer (IE) 5.0 (or greater)

2.2   Configuring Your Browser

The following browsers can be used to access eDRS:

- Netscape 6.0 (or greater)

- Internet Explorer (IE) 5.0 (or greater)

To configure the Netscape browser:

1. Launch your browser.

2. Select **Preferences** from the Edit menu as shown in Figure 1. This displays the Preferences screen shown in Figure 2. .

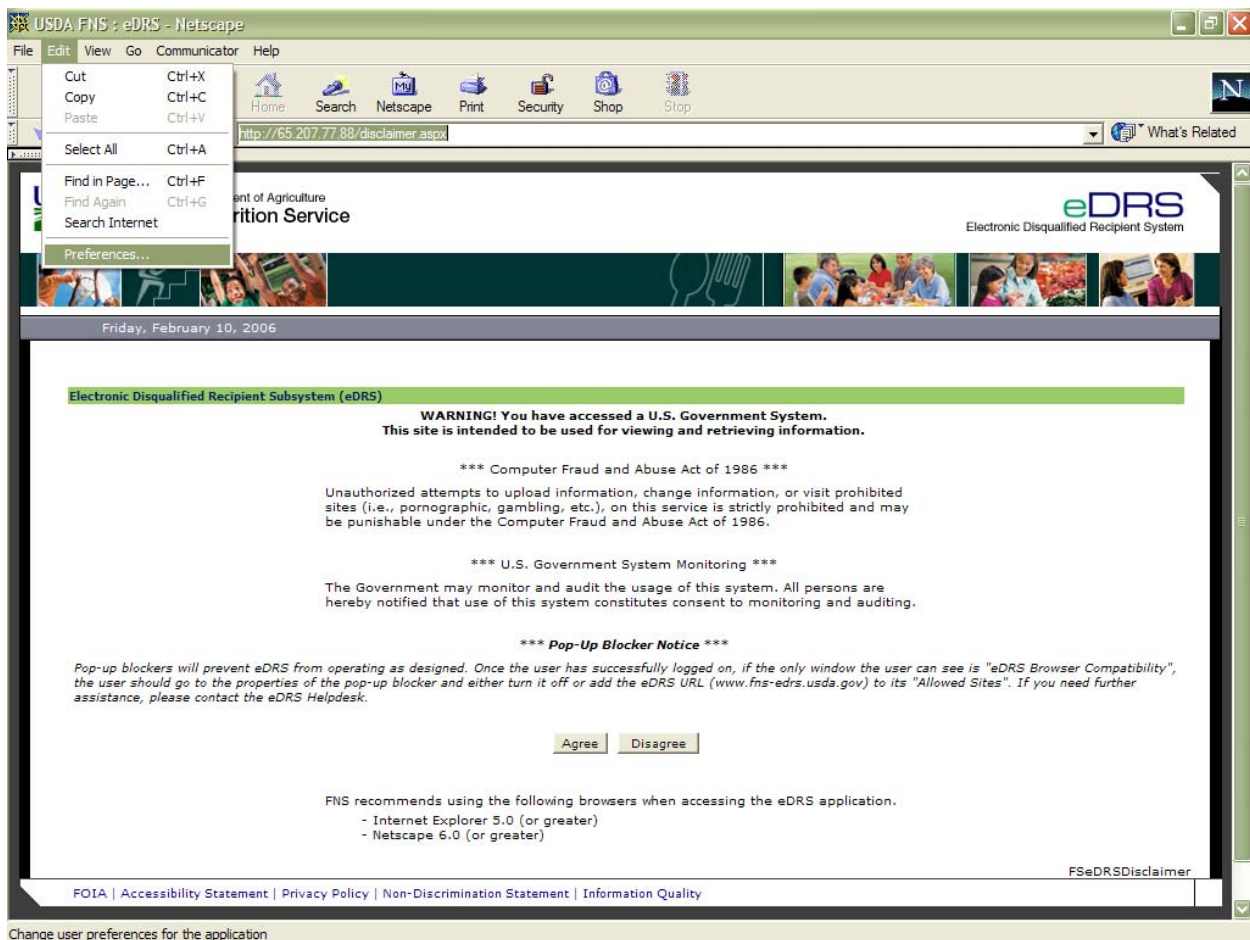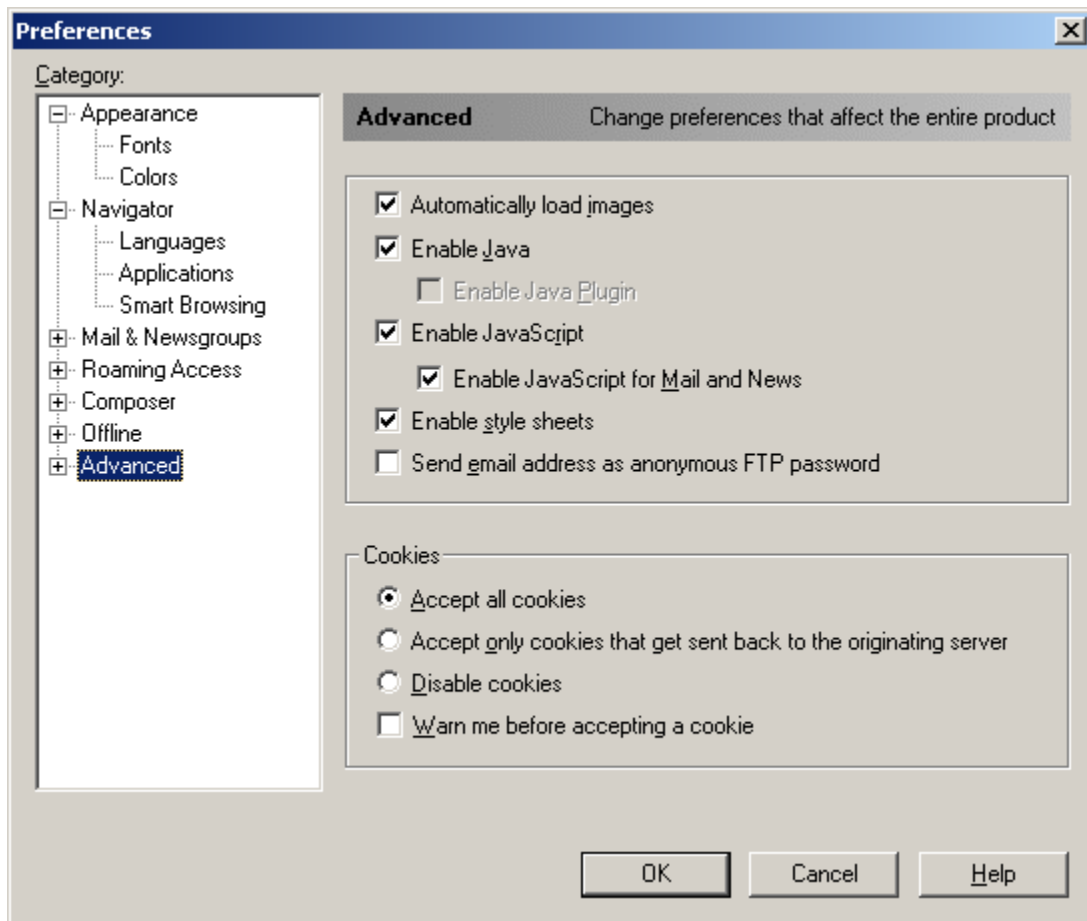**Figure 1. Netscape Browser Configuration**

Figure 2. Netscape Browser Preferences Screen

3. Click the **Advanced** tab.

4. Ensure that the following options are selected in the Advanced window:

   − Automatically load images

   − Enable Java

   − Enable JavaScript

   − Enable JavaScript for Mail and News

   − Enable style sheets

   − Accept all cookies

5. Click the OK button.

To configure the Internet Explorer browser:

1. Launch your browser.

2. Select **Internet Options** from the Tools Menu as shown in Figure 2. This displays the Internet Options screen, shown in Figure 3.

Figure 2. Internet Explorer Browser Configuration
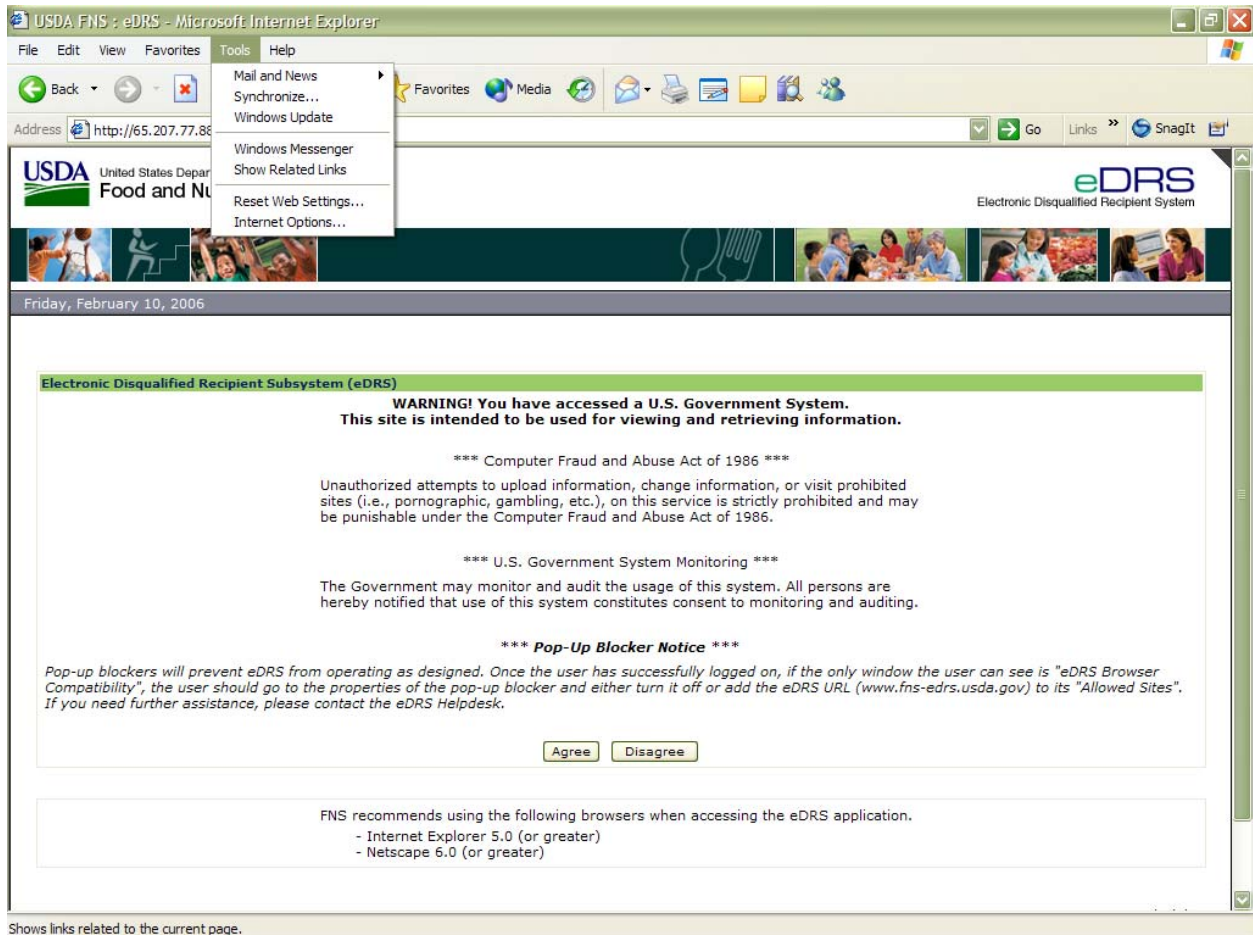
Figure 3. Internet Explorer 5.0 Browser Internet Options Screen
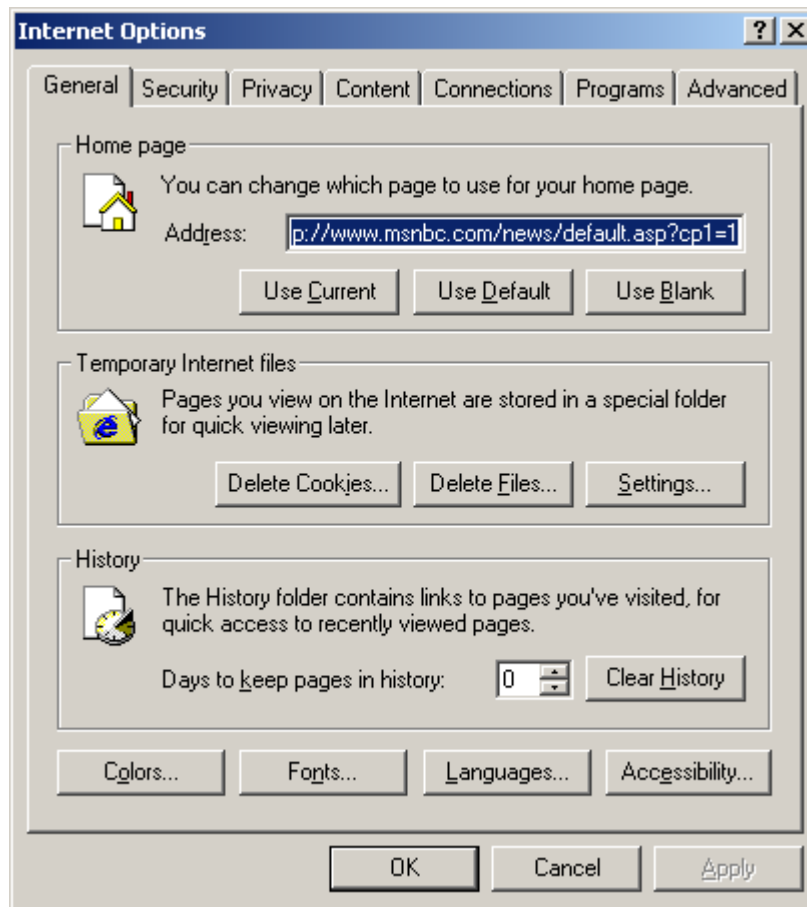
3.   Click the **Security** tab. This displays the screen shown in Figure 4.

Figure 4. Internet Explorer 5.0 Browser Internet Options Security Screen
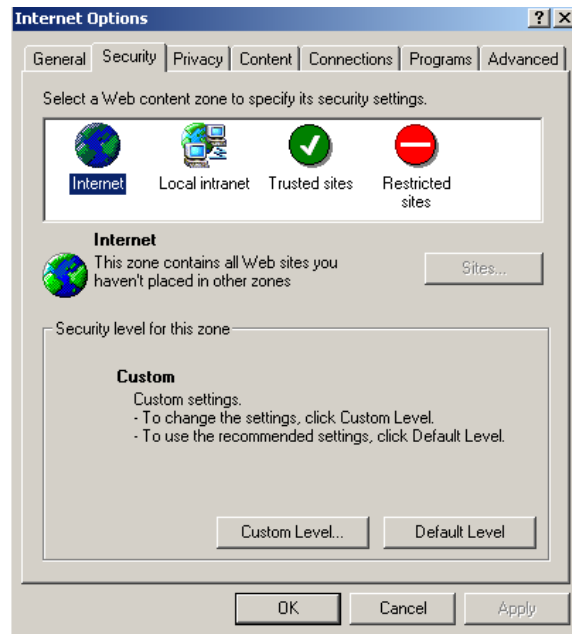
4. FNS users will have a custom security level established and will be unable to modify the Security level for this zone.

5. Click the **Default Level** button and then click **OK** to close the Internet Options screen.

3 Accessing eDRS

This chapter explains accessing eDRS, requesting a username and password, and logging into the eDRS application**.**

3.1   Logging into eDRS

To login to eDRS:

1. Open your browser and type https://www.fns-edrs.usda.gov/ in the address bar. The eDRS Terms and Conditions, shown in Figure 5, is the first screen displayed.

Figure 5. Terms and Conditions Screen
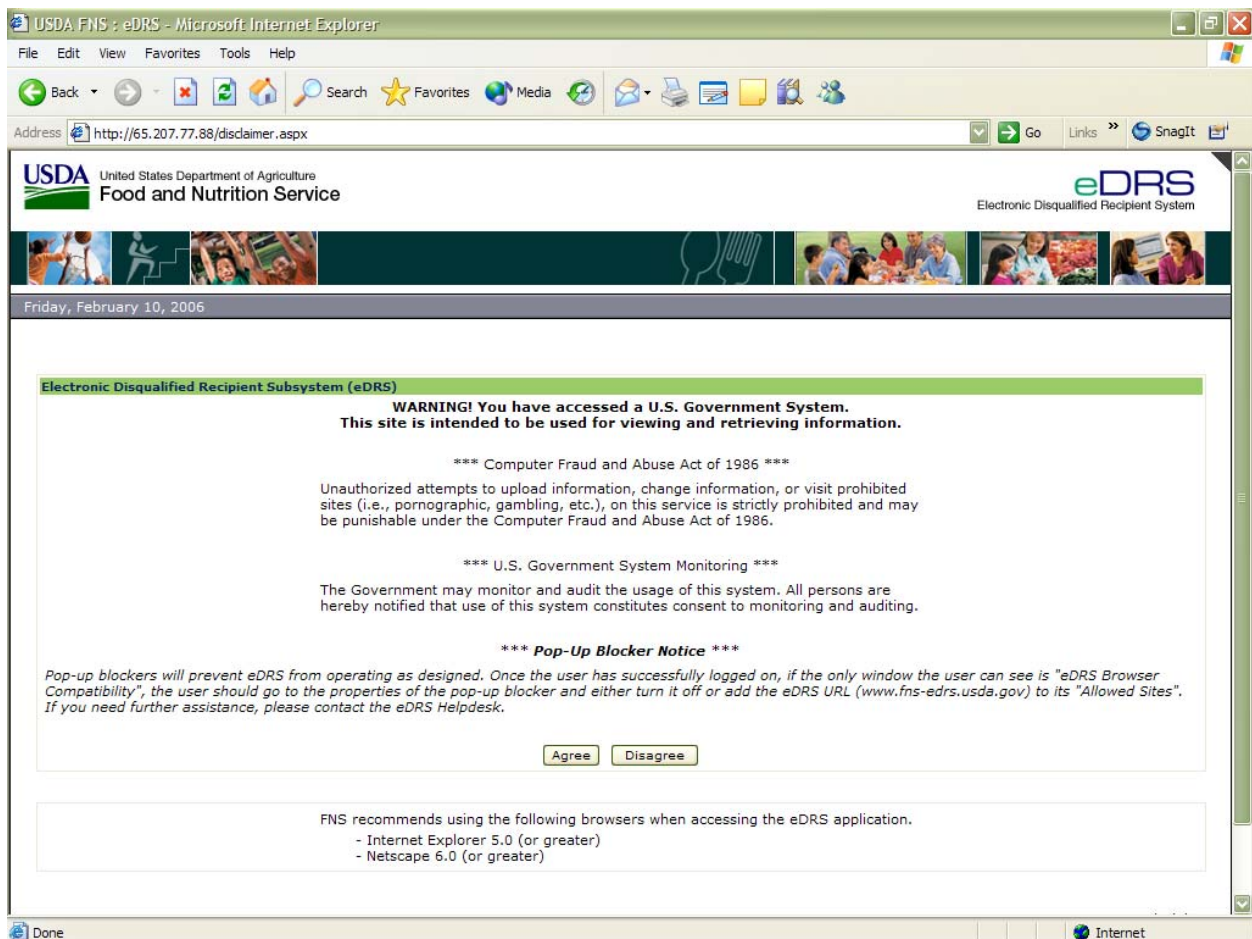
2. Click the **Agree** button to indicate you understand and consent to the terms of usage. You will be taken to the eAuthentication Disclaimer screen, shown in Figure 6. If you are already logged into eAuthentication, your browser will go directly to the eDRS welcome screen seen in Figure 8.

Note: Pop-up blockers will prevent eDRS from operating as designed. Once the user has successfully logged on, if the only window the user can see is "eDRS Browser Compatibility," the user should go to the properties of the pop-up blocker and either turn it off or add the eDRS URL (https://www.fns-edrs.usda.gov) to its "Allowed Sites." If you need further assistance, please contact the eDRS Helpdesk.

Figure 6. eAuthentication Disclaimer Screen
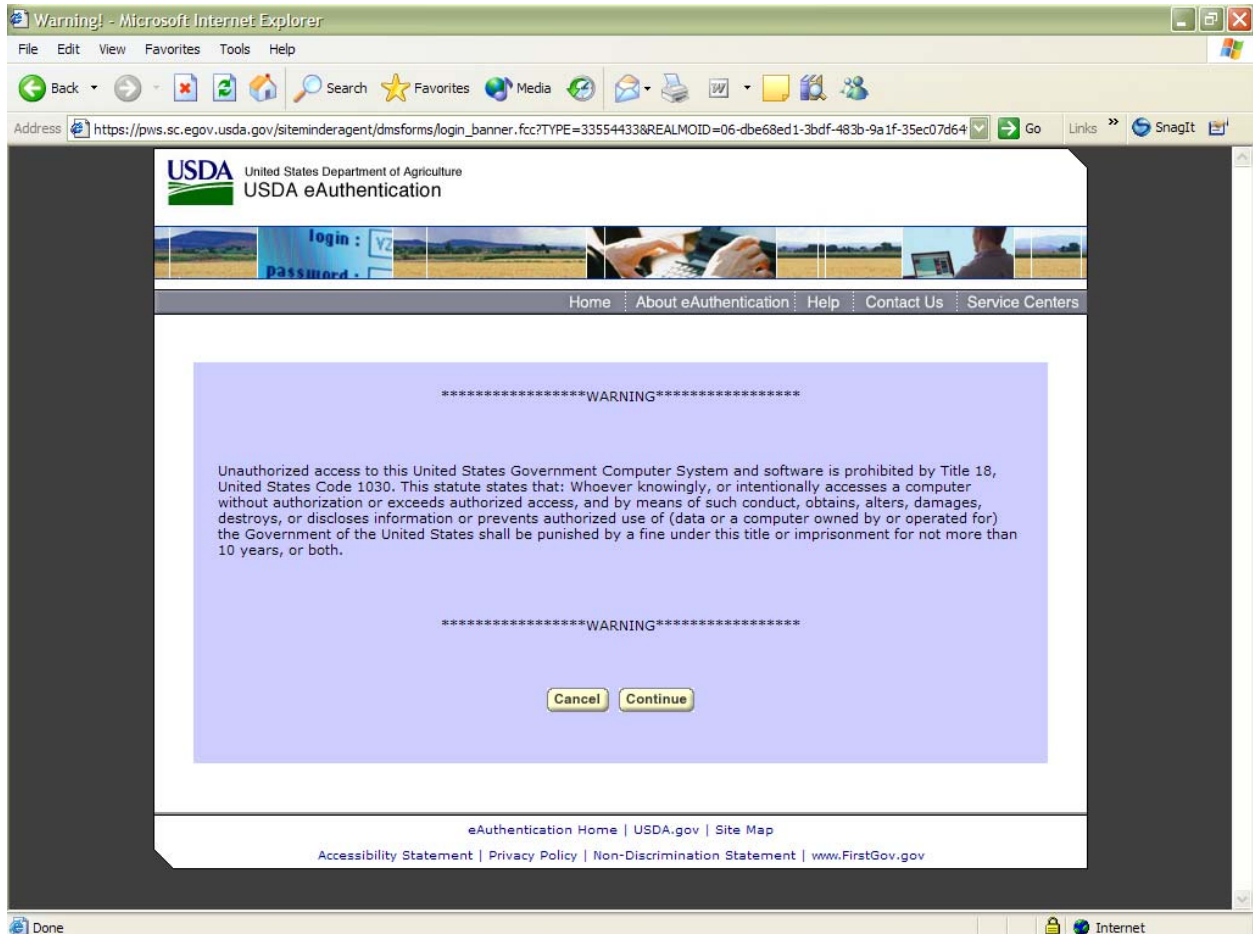
3. After selecting **Continue**, the eAuthentication Login screen displays, as shown in Figure 7.

Figure 7. eAuthentication Login Screen
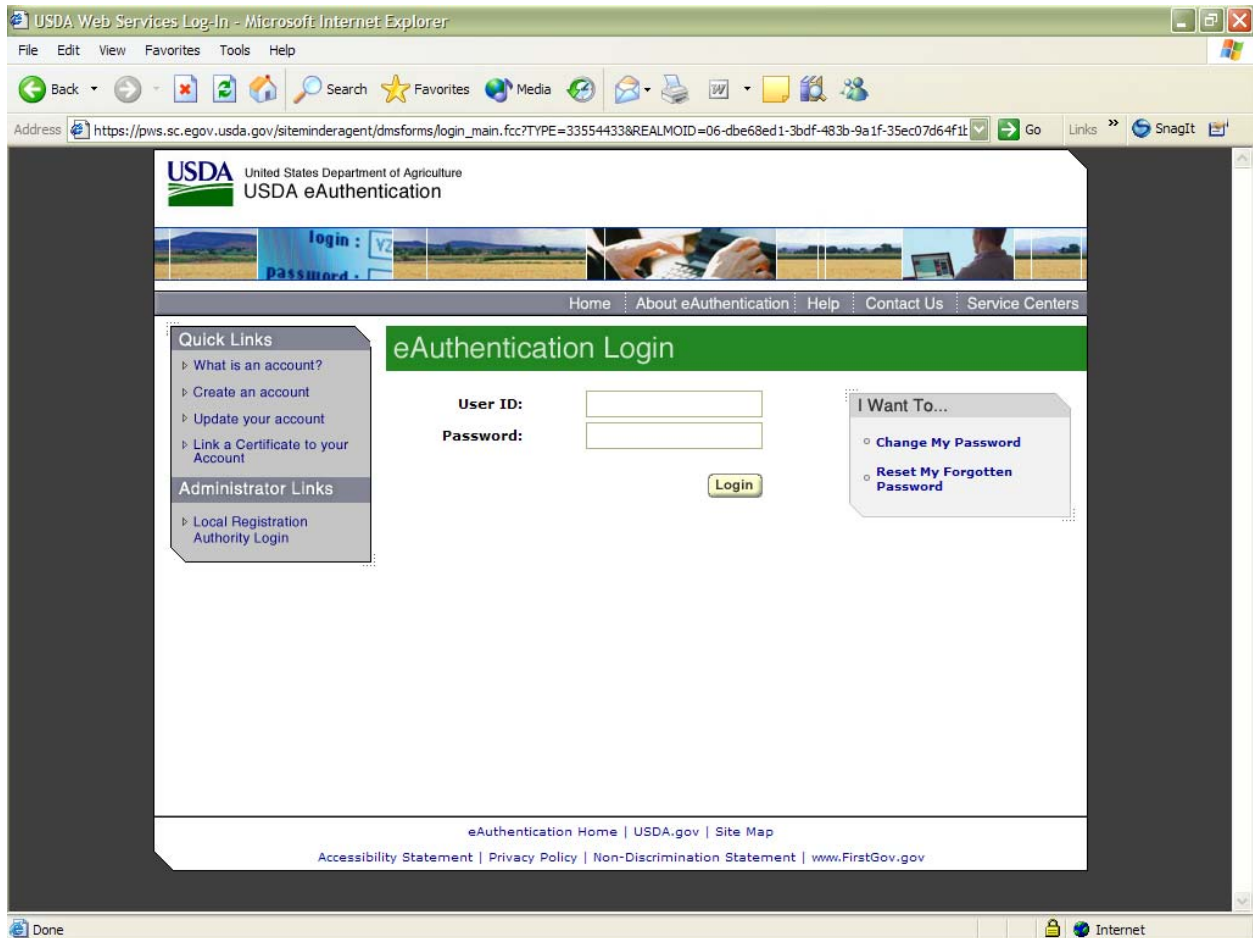
4. After successfully logging into eAuthentication, the eDRS Home Page is displayed as shown in Figure 8.

Note: If you do not have a valid user account, you must complete FNS Form 674 to request access to the system.

Figure 8. eDRS Home Page Screen
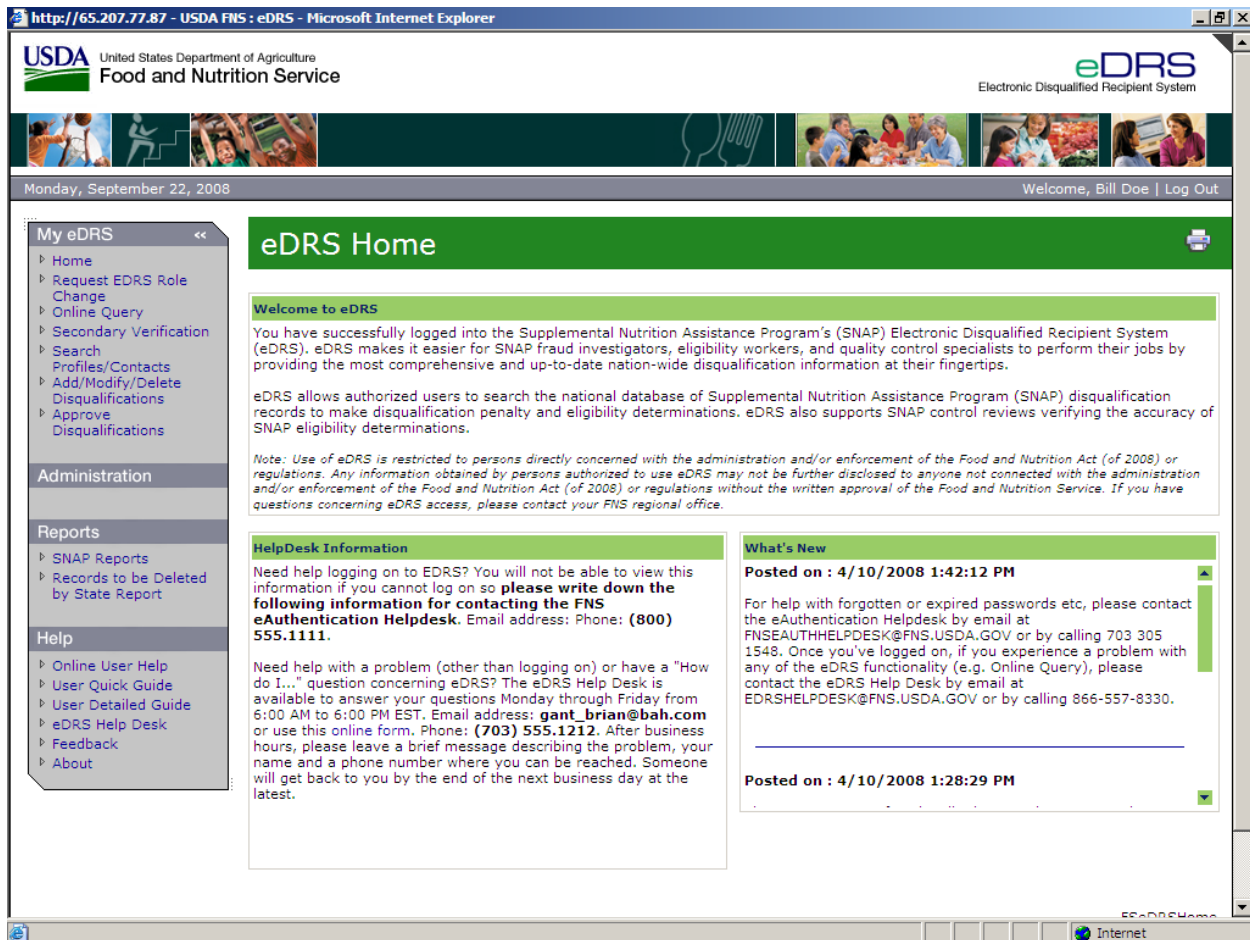
The eDRS home page is divided into four main sections: Menu Options, Welcome, Help Desk Information, and What's new.

- The "Menu Options" displayed in the left menu bar are based on the access that you have been granted in the system. This menu appears on every page within the eDRS application.

- The "Welcome to eDRS" section provides an overview of the system.

- The "Help Desk Information" is available in the bottom left-hand corner of the Home page and includes contact information and hours of availability.

- The "What's New" section in the right-hand corner of the page will inform the user of changes to the system or related policies.

Note: My eDRS menu bar is collapsible by clicking on the arrow '«' and expandable by clicking on 'menu'.

3.2   Requesting a User Account

USDA is centralizing user account management and access controls through the eAuthentication and Central Security Administrative Management System (CSAMS) initiatives. eDRS users must now have an eAuthentication account that will be used as the login ID for eDRS. eDRS privileges are granted through the CSAMS process rather through eDRS's online request process. A user must first get an eAuthentication ID before requesting access to eDRS. The following paragraphs describe how to request an eAuthentication ID and access to eDRS.

To request an eAuthentication ID:

1. Go to www.eauth.egov.usda.gov and click on the **Create An Account Page.** *Note: eDRS requires level II access.*

2. Follow the instructions for USDA employees or for Non-Federal Employees for creating accounts.

3. Once you have created the account online, you must visit a Local Registration Authority (LRA) and bring a government issued photo ID such as;

    - State Driver's Licenses
    - Military identification cards
    - State employee identification cards
    - US passports

4. The LRA will compare the user to the picture ID, then log on and locate the user's account and activate it.

To request an eDRS Account:

1. Follow the instructions from Section 3.1 to Access eDRS.

2. Click on the link for **FNS -674,** the Computer Access Request Form.

3. Follow the form's instructions and complete all required information.

4. Provide completed form to your State Security Officer for approval and signature.

5. Once approved by your State Security Officer your signed form needs to be forwarded to your Regional Security Officer for activation. Your eDRS account will be created and you will be notified once it has been activated.

To request additional rights and privileges:

1. Follow the instructions from Section 3.1 to access eDRS.

2. Click on the link on the left menu bar under My eDRS for **Request eDRS Role Change.** The link will take you to the FNS Form 674, the Computer Access Request Form, as shown in Figure 9.

Figure 9. FNS Form 674 Instructions Window
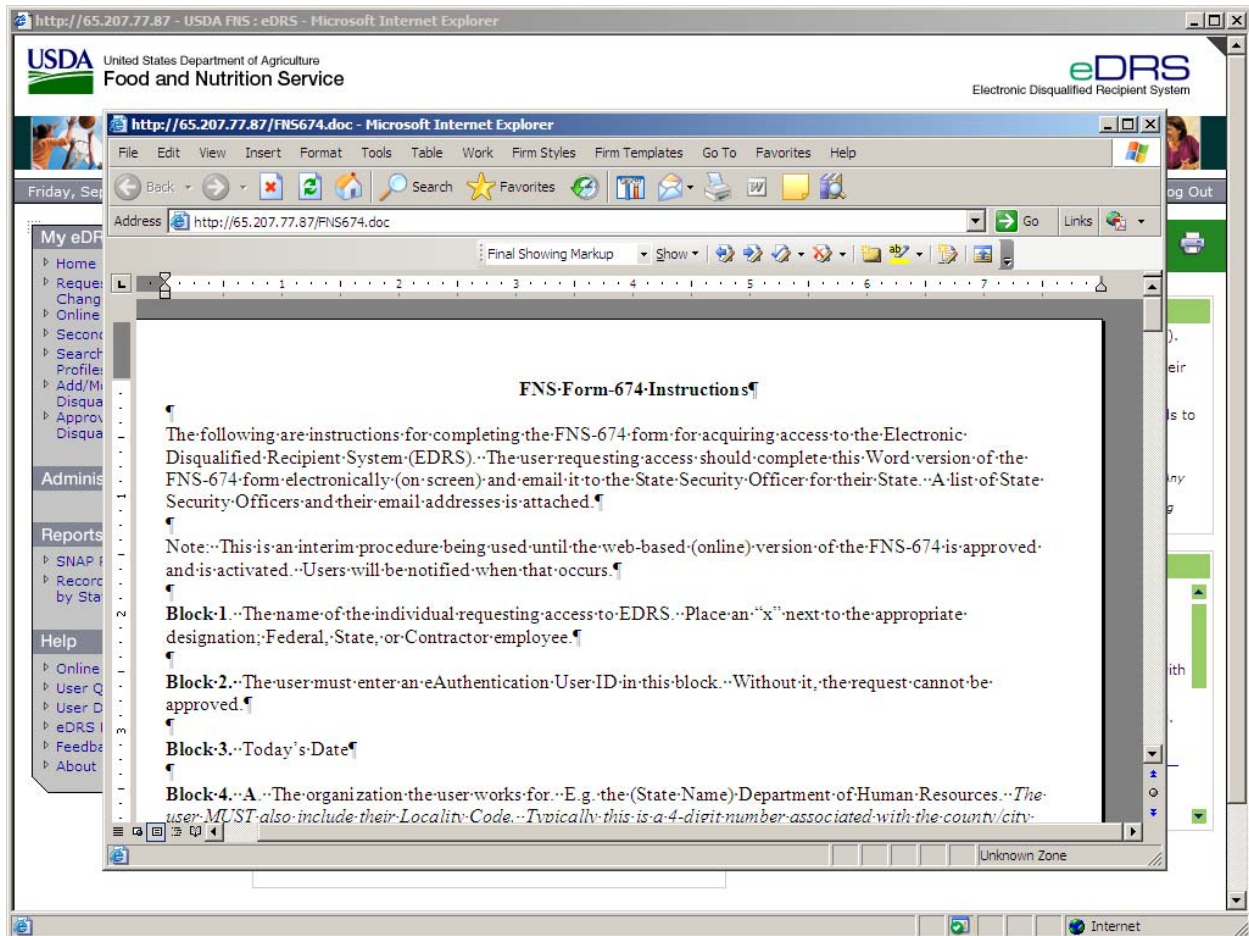
3. Follow the form's instructions and complete all required information. Indicate on the form what rights and/or privileges you need to access.

4. Provide completed form to your supervisor for approval and signature.

5. Once approved by your State Security Officer, your signed form needs to be forwarded to your Regional Security Officer for activation. Your eDRS account will be updated and you will be notified when it is complete.

4 Performing Online Queries

Users will perform online queries to determine eligibility of those requesting benefits or to assess a penalty determination. An Online Query allows you to access a disqualification record on an individual through submitting a query by social security number (SSN) or name. This section will be expanded as additional functionality is added to eDRS.

> **To perform an online query:**
>
> 1. Go to the eDRS Home page screen, as shown in Figure 10.

Figure 10. eDRS Home Page Screen

2. Click **Online Query** in the menu bar to display the Online Query screen, as shown in Figure 11.

    From the Online Query screen, you can:

    –   Create and submit a single query
    –   Create and submit a group of queries (batch)

Figure 11. Online Query Screen

The Recipient Query screen contains the following buttons:

–   The **Submit Single** button is used to submit a single query
–   The **Add to Batch** button is used to add another query criterion to the list (batch query)
–   The **Clear** button is used to clear all the fields

4.1   Submitting Single Queries

1. From the Online Query screen, select the Query Purpose from the **Query Purpose** drop down list, as shown in Figure 12. There are four possible choices for Query Purpose: Eligibility Determination, Penalty Determination, Quality Control, and Administration. NOTE: If the query purpose is "Eligibility", the query will only return records for recipients whose disqualifications are in an active status.

Figure 12. Online Query, Query Purpose Screen

2. Select the search criteria from the **Search Criteria** drop down list, as shown in Figure 13. There are four possible choices for Search Criteria: SSN; Last Name; Last Name and First Name; Last Name, First Name and Middle Initial.

Figure 13. Online Query, Search Criteria Screen

3. Enter criteria data in the appropriate fields based on the parameters selected in the **Search Criteria** drop down list, as shown in Figure 14 (those parameters not chosen will be grayed out so you may not enter any information in those fields).

Figure 14. Online Query. Last Name Screen

4. Click the **Submit Single** button to submit the query.

5. The results based on the selection criteria are displayed. The query results shown in Figure 15 are for a search by last name and first name.

**Figure 15. Online Query, Results by Last Name and First Name Screen**

The records will be displayed in two different ways depending on the individual's disqualification status:

> Regular Type = The participant is not currently in disqualified status, but has served at least one in the past.
>
> **Bolded Type** = The participant is currently in disqualified status.

The Disqualification Status column also displays whether or not the participant is in disqualified status. The column will have a "Y" in it if they are in disqualified status, and an "N" in it if they are not in disqualified status.

6. If the number of hits for your query exceeds the maximum number allowable (i.e., 5,000) or does not contain the minimum number allowable (i.e., 1) you will be prompted to refine your query by a pop-up message, as shown in Figure 16 and Figure 17.

Figure 16. Error Message, Query Exceeds Maximum Number Allowable
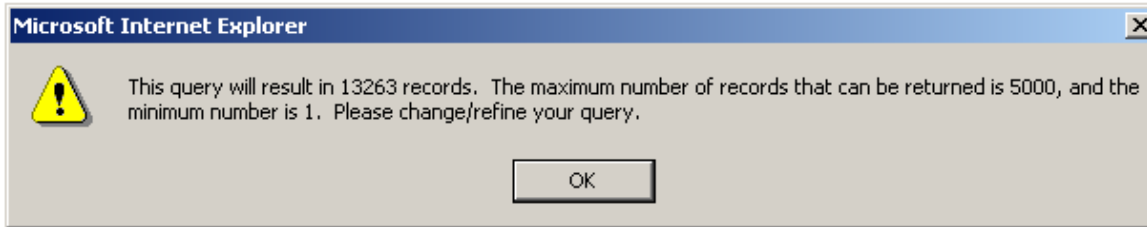
Figure 17. Error Message, Zero Results or No Match
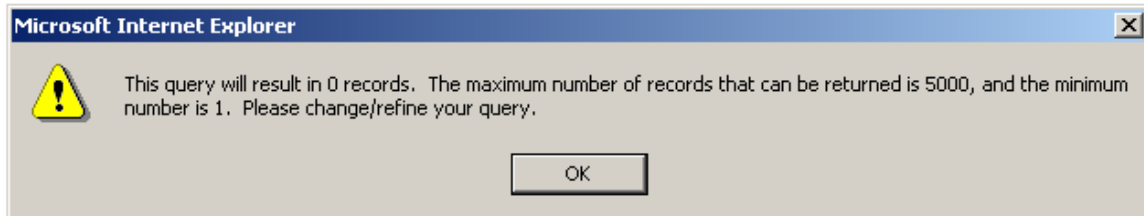
You will then be required to go back and change/refine your search criteria to decrease the number of records returned.

7. To go to a different page of the query results:

    –   Click the **Next >** to move forward one page or **< Previous** to go back one page.

    –   Enter page number in **Jump to Page** box and click **Go >**.

8. To view a different number of records per page if you have large number of results, click on the **Records per page** drop down list to choose the number of records you would like to view per page, as shown in Figure 19 (the system automatically defaults to 10 records per page).

9. To print the screen, click on the **View Printer Friendly Version** link. Once the printer friendly version has displayed, as shown in Figure 18, click the **Print** button at the top right of the screen. Click **Close** to return to the normal view.

Note: To avoid text being cutoff while printing, change the page layout to "Landscape" prior to printing.

Figure 18. Online Query Search Results, Printer Friendly Version Screen

Figure 19. Online Query Screen, Records per page Option Screen

10. To return to the Online Query screen, click the **Back** button at the bottom of the page, or click **Online Query** in the menu bar. Please note that clicking the **Back** button deletes all queries.

11. To view disqualification details from the Online Query Results screen, click on the SSN of the record you would like to view. The result will be the Online Query Disqualification Details screen, as shown in Figure 20.

Figure 20. Online Query, Disqualification Details

12. To print this screen, click the **Print Icon** on the top right of the screen.

13. To return to the Online Query Results screen, click the **Back** button at the bottom of the page.

4.2   Submitting Batch Queries

A user who wants to do multiple queries has the option of submitting a batch query instead of submitting each query individually. For a batch query, the user enters the selection criterion to build a "list" of queries and then submits the entire list. The user will have the opportunity to preview the list of queries prior to submission.

To submit a batch query:

1. Click **Online Query** in the menu to display the Online Query screen, as shown in Figure 21.

Figure 21. Online Query Screen

2. From the Online Query screen, select the query purpose from the **Query Purpose** drop down list, as shown in Figure 22. There are four possible choices for Query Purpose: Eligibility Determination, Penalty Determination, Quality Control, and Administration.

Figure 22. Online Query, Query Purpose Screen

3. Select the search criteria from the **Search Criteria** drop down list, as shown in Figure 23. There are four possible choices for Search Criteria: SSN; Last Name; Last Name and First Name; and Last Name, First Name and Middle Initial.

Figure 23. Online Query Screen, Search Criteria Screen

4. Enter criteria data in the appropriate fields based on the parameters selected in the **Search Criteria** drop down list, as shown in Figure 24 (those parameters not chosen will be grayed out so you may not enter any information in those fields).

Figure 24. Online Query, Search Criteria Screen

5. Click the **Add to Batch** button to add your query to the batch and enter another query. In the Query Criteria screen, the **Query Purpose** field will be grayed out with the same value that you chose for the first query and cannot be changed, as shown in Figure 25. To select a new query purpose and continue to build queries, click the **Clear** button.

Figure 25. Online Query, Query Criteria: Batch Queries (1) Screen

6. Select the search criteria for the second query from the **Search Criteria** drop down list.

7. Enter the criteria data in one or more of the remaining fields based on the search criteria chosen in the **Search Criteria** drop down list and click **Add to Batch.** The second query you entered will appear in the **Pending Queries** section, as shown in Figure 26.

Figure 26. Online Query, Query Criteria: Batch Queries (2) Screen

8. Repeat steps 6 through 7 as needed until all desired queries are added.

9. The list of queries you have added to the batch will appear under **Pending Queries** and will list the number of records found for each query. If a query is greater than the maximum allowable result (i.e., 5,000) or less than the minimum allowable result (i.e., 1), a Pop-up box will appear asking you to edit the query based on the size, as shown in Figure 27 and Figure 28. After receiving this error message, click the **OK** button. The **Submit Batch** button will be grayed out until you either edit or delete the record.

Figure 27. Error Message, Maximum Number of Records That Can Be Returned
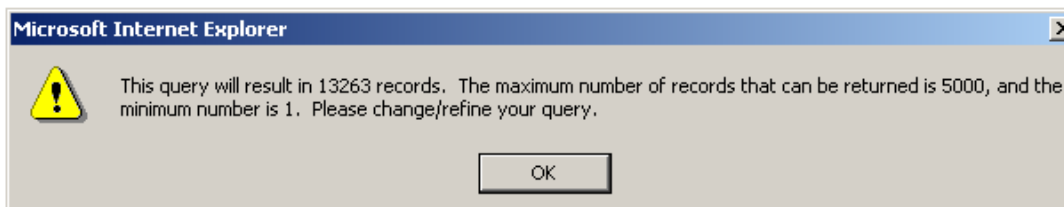
Figure 28. Error Message, Zero Results or No Match
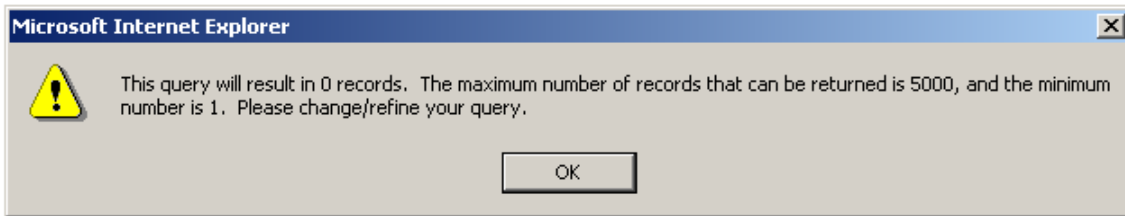
10. To edit a query, click the check box beside the entry you want to edit and click the **Edit** button. Please note you can edit only one query at a time.

11. To delete a query, click the check box beside the entry you want to delete and click the **Delete** button.

12. To submit the batch query, click the check box beside each entry you want to submit, or click the check box next to Submit All, and click the **Submit Batch** button to submit your batch. Your batch query results will display, as shown in Figure 29.

Figure 29. Query Results, Online Batch Screen

13. The records will be displayed in two different ways depending on the individual's disqualification status:

   Regular Type = The participant is not currently in disqualified status, but has served at least one in the past.

   Bolded Type = The participant is currently in disqualified status.

   The Disqualification Status column also displays whether or not the participant is in disqualified status. The column will have a "Y" in it if they are in disqualified status, and an "N" in it if they are not in disqualified status.

14. To go to a different page of the query results, you have two options:

   – Click the **Next >** to move forward one page or **< Previous** to go back one page.

   – Enter page number in **Jump to Page** box and click **Go >.**

15. To view a different number of records per page, click on the **Records per page** drop down list to choose the number of records you would like to view per page (the system automatically defaults to 10 records per page).

16. To return to the Online Query screen, either click the **Back** button at the bottom of the page, or click **Online Query** in the menu bar.

17. To print the screen, click on the **View Printer Friendly Version** link. Once the Printer Friendly Version has displayed, as shown in Figure 30, click the **Print** button at the top right of the screen. Click **Close** to return to normal view.

Note: To avoid text being cutoff while printing, change the page layout to "Landscape" prior to printing.

18. To view disqualification details, from the Online Query Results screen, click on the SSN of the record you would like to view. The result will be the Online Query, Disqualification Details screen, as shown in Figure 31.

Figure 30. Batch Query Search Results, Printer Friendly Version Screen

Figure 31. Online Query, Disqualification Details Screen

19. To print this screen, click the **Print Icon** in the top right corner of the screen.

20. To return to the Online Query Results screen, click the **Back** button at the bottom of the page.

5 Performing Ad Hoc Queries

Ad Hoc Query functionality provides a user with enhanced query and reporting capabilities by allowing the user to search by various recipient and disqualification criteria. Additionally, the user can narrow the search by location: national, regional, state, and locality. The user has the ability to search by entering single criteria or by multiple criterions. In Ad Hoc Queries, the user is able to search within a range of data or for a specific data set (i.e., a date range or a specific date).

To perform an Ad Hoc Query:

1. Click **Ad Hoc Query** on the left menu bar under My eDRS to display the Ad Hoc Query screen, as shown in Figure 32.

Figure 32. Ad Hoc Query, Criteria Selection Screen

2. Select the **Location Criteria** you wish to search, as shown in Figure 33. You have the option to:

    −   Search without selecting location criteria. To perform a search without narrowing the results by location, do not select any location criteria.

    −   Perform a National Search. Click the box next to "National Search." Note that by selecting National Search the system will search by all regions, states and localities.

    −   Perform a search by region, state or locality. Select one or more regions. Once a region is selected, the states within the region will appear in the State drop down box. If multiple regions are selected, all the states within the selected regions will appear in the drop down. If desired, select one or more states. If one state is selected, the localities will appear in the Locality dropdown box. If more than one state is selected, localities cannot be selected.

Figure 33. Ad Hoc Query, Criteria Selection: Location Criteria Screen
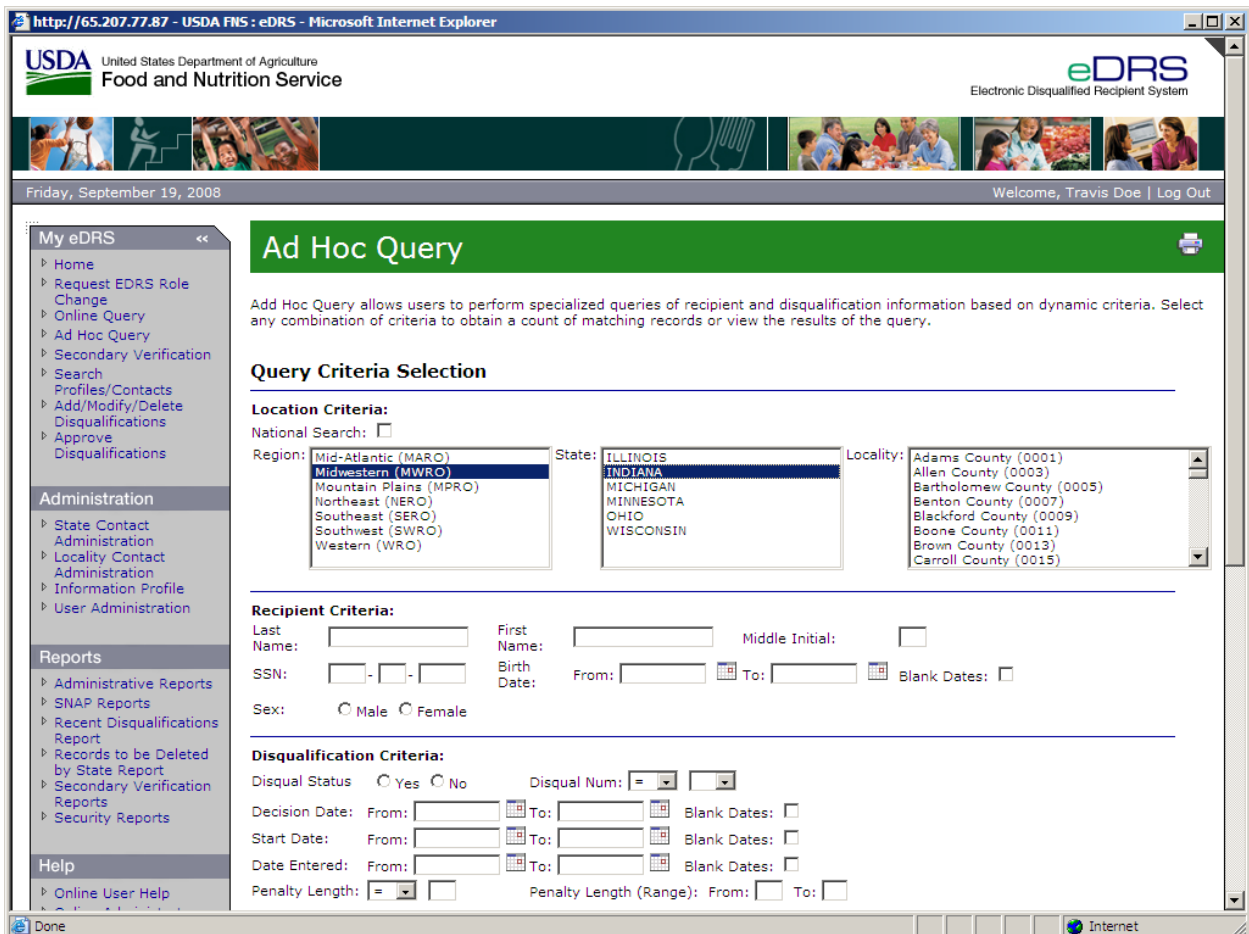
3. In the Recipient Criteria section, enter data into the fields you wish to search. You may choose to enter none or any of the following criteria: **Last Name, First Name, Middle Initial, Social Security Number (SSN), Birth Date,** and **Sex,** as shown in Figure 34. For birth date data, you may enter a date range to search. If you enter data only in the "From" box for birth date, the system will search from the date entered to the present day.

Note: You may choose not to enter criteria or enter specific data in any combination. To perform an Ad Hoc Query it is not a requirement to search using recipient criteria.

Figure 34. Ad Hoc Query, Criteria Selection: Recipient Criteria Screen
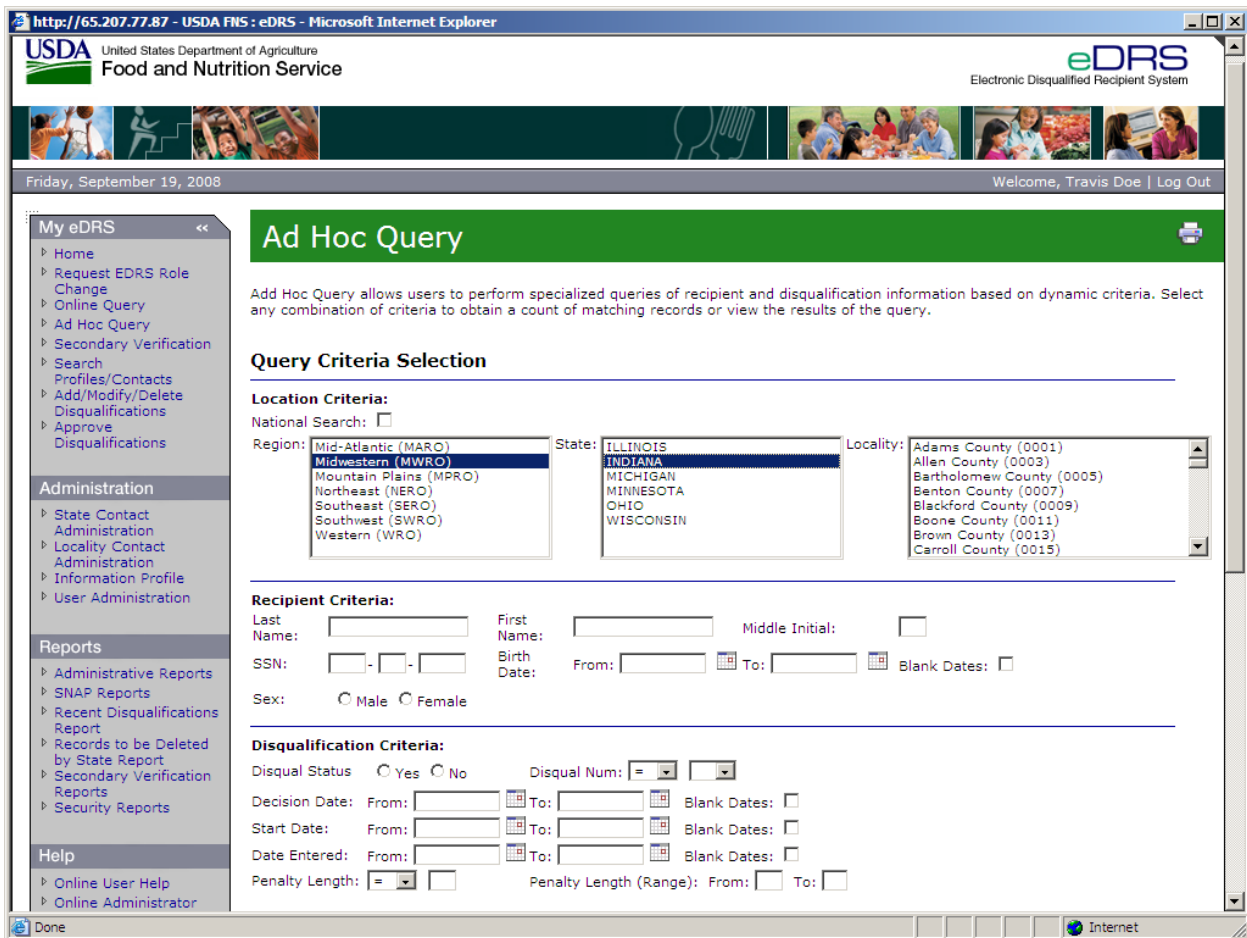
4. In the Disqualification Criteria section, enter the disqualification data into the fields you wish to search. You may choose to enter none or any of the following criteria: **Disqualification Status, Disqualification Number, Decision Date, Start Date, Date Entered, Penalty Length and Penalty Length Range,** as shown in Figure 35.

For disqualification number and penalty length, you have the ability to choose the kind of search operation for the criteria. If you enter this kind of criteria, choose one of the following: equal to, greater than, less than, greater than and equal to, or less than and equal to. The system defaults in both cases to "equal to." For the decision date and start date fields, if you enter data into the "From" box only, the system will search from the date entered to the present day.

Note: You may choose not to enter criteria or enter specific data in any combination. To perform an Ad Hoc Query it is not a requirement to search using disqualification criteria.

Figure 35. Ad Hoc Query, Criteria Selection: Disqualification Criteria Screen

5. Click **Get Count** for the system to display the number of records that meet your criteria, as shown in Figure 36.

Figure 36. Ad Hoc Query, Criteria Selection Get Count Screen

*Note: Once you have selected **Get Count**, you can display results or modify the search criterion. You do not have to display a record count prior to displaying the results. To Clear the selected criterion, click **Clear All**.*

*Note: If when you select **Get Count** the resulting count is higher than 5,000 you should refine your search to more accurately display the records.*

6. Click **Display Results** for the system to display the records that match your search criteria as shown in Figure 37. *Note: above the records display the system indicates the criteria used to conduct the search.*

Figure 37. Ad Hoc Query, Criteria Selection: Display Results Screen

Note: As in Online Query, if your search returns a record count less than 0 or greater than 5,000, you will receive a pop-up box requesting you to refine your search before viewing any disqualification records.

7. To modify your search criteria, click **Back** on the bottom right corner under the results to go back and re-enter your search criteria. At this time, you may enter additional search criteria or clear the screen by clicking **Clear All.**

8. To print the screen, click on the **View Printer Friendly Version** link. Once the printer friendly version has displayed, click the **Print** button at the top right of the screen. Click **Close** to return to normal view.

Note: To avoid text being cutoff while printing, change the page layout to "Landscape" prior to printing.

6 Conducting Secondary Verification

The Secondary Verification functionality provides users an electronic way to request verification of a previous disqualification and to track that request. A user can request the secondary verification from the disqualification details and can track the state of the request through an inbox. The Locality Contacts (Primary and Secondary) receive this request and are asked to provide documentation to verify the disqualification status of an individual. Locality Contacts provide documentation of the disqualification by sending information to the Requestor (external to the eDRS system), if verified. The status of the request will be captured in the Secondary Verification inbox and outbox of the locality contact and requestor.

To request Secondary Verification:

1. Conduct query in the Online Query section as seen in Section 4 of this document.

2. Select the record that you would like to request a secondary verification for by clicking on the **SSN** field for that record. The result of this selection will be the Disqualification Details screen, as shown seen in Figure 38.

Figure 38. Disqualification Details Screen

3. Click the **Request Secondary Verification** button.

4. The "*Secondary Verification Successfully Created*" message will display, as shown in Figure 39.

Figure 39. Secondary Verification Successfully Created Message Screen

5. If a Locality Contact has not been assigned in the system *"The locality contact information is missing. Notification has been sent to the FNS Regional Coordinator"* as shown in Figure 40.

Figure 40. The Locality Contact Information is Missing Screen

6. If the state associated with the record is not an eDRS participant a message will display as shown in Figure 41 stating: "*The Locality Contact is not a user of the system. Secondary Verification will need to be requested by telephone. Please refer to contact information provided with this record or to the Profiles link on the left toolbar for Locality Contact Information.*"

Figure 41. Non-User Locality Contacts Screen

To view Secondary Verification Requests as a Requestor:

1. Click **Secondary Verification** in the left menu. Select the **Requestor** in the drop down menu on the upper right hand of the Secondary Verification screen. The Requestor selection will show records that have been requested for verification, as shown in Figure 42.

Figure 42. Secondary Verification, Request Screen

2. Select the **Verification Tracking number** for the request that you would like to view. This shows the status of the request. The status changes from **New** to **Reviewed** when the Locality Contact views the request for the first time. The status changes again when the Locality Contact manually changes the status to **Documentation does not exist** or **Documentation Sent**.

3. The Requestor updates the status and closes the request by selecting **Closed with response** or **Closed documentation does not exist** from the Status drop down list, as shown in Figure 43. If the request remains open for more than 60 days without any action taken on the disqualification record, the system will automatically change the status to **Closed by system**. However, the Requestor at any time may close a request by selecting Closed by Requestor, as shown in Figure 44.

Figure 43. Secondary Verification, Tracking Details Screen

Figure 44. Secondary Verification, Tracking Details: Closed by Requestor Screen

To view Secondary Verification Requests as a Locality Contact:

1. Click **Secondary Verification** in the left menu bar under My eDRS. Select the **Locality Contact** in the drop down menu on the upper right hand of the Secondary Verification screen. The Locality Contact selection will show records to be verified, as shown in Figure 45.

NOTE: The Locality Contact receives requests and provides the disqualification documentation on an individual. The Requestor initiates the secondary verification process by submitting the request.

Figure 45. Secondary Verification, Locality Contact Screen

2. Select the **Verification Tracking Number** for the request that you would like to view. The Verification Tracking Details will be displayed, as shown in Figure 46.

Figure 46. Verification Tracking Details Screen

Note: When a Locality Contact clicks on the Verification Tracking Number for the first time the status will change from New to Reviewed. If the Locality Contact has not reviewed the request within seven (7) days an email reminder will be sent to both Locality Contact and the Requestor. Subsequent emails reminders will be sent every seven days for the first 28 days with the message; "Note: After 60 days the system will automatically close the request if no action is taken."

3. Once the request is reviewed and action has been taken, the Locality Contact updates the status of the Verification in the Update Status field, as shown in Figure 46. The status can be set to **Documentation Does Not Exist** (if the record cannot be verified) or **Documentation Sent** (if the disqualification documentation has been sent to the requestor.)

4. Select **Save** to record the status update.

Note: If the request is verified, the Locality Contact will send documentation to the Requestor (external to the system.)

7 Searching Profiles/Contacts

The Search Profiles/Contacts function allows you to access contact information by searching in the FNS, State, and/or Locality profiles. Additionally, for each state an information profile is presented that provides technical details about the states transmission method with FNS.

To Perform a Contact Search:

1. From the eDRS Home page screen, click **Search Profiles/Contacts** in the menu bar to display the Search Profiles/Contacts screen, as shown in Figure 47.

Figure 47. Search Profiles/Contacts Screen

2. From the Search Profiles/Contacts screen, you can search contacts by FNS headquarters or region, state and/or locality.

To Search by FNS:

Searching by FNS will display all contacts associated to headquarters or region. The results list SNAP and IT and Security contact types. For each contact, information such as Name, Title, Phone, E-mail and Program/Division are provided.

1. Select **FNS Headquarters and/or Region(s)** from the Region drop down list, as shown in Figure 48.

Figure 48. Search Profiles/Contacts, FNS Region Selected Screen

2. Click on **Search**; the Regional Profile Results will be displayed, as shown in Figure 49.

Figure 49. Regional Profile Results Screen

3. To Print, click the **Print Icon** or to avoid text from being cut off on the printed document click the **View Printer Friendly Version**. This will launch another window with the search results. Click on the word **Print** in the right hand corner of the screen.

4. To return to the Search Contacts page, click on **Back** on the Regional Profile Results screen or **Search Profiles/Contacts** on the left toolbar.

To Search by State:

State contacts displays all state contact types associated with that state. State contact types include SNAP and IT and Security Contacts types.

1. Click the **Search Profiles/Contacts** or the **Back** from the Regional Profile screen.

2. Select **Region(s)** from the FNS drop down list and select **State(s)** from the State drop down list, as shown in Figure 50. When one region is selected, only the states within that region will display in the state drop down list. When more than one region is selected, states associated with the selected regions will display in the state drop down list.

Figure 50. Search by State Screen

3. Click on **Search**; the results of the search will be displayed, as shown in Figure 51.

Figure 51. State Profile Results Screen

4. To Print, click the **Print Icon** or to avoid text from being cut off on the printed document click the **View Printer Friendly Version**. This will launch another window with the search results. Click on the word **Print** in the right hand corner of the screen.

5. To return to the Search Contacts page, click on **Back** on the State Profile screen or **Search Profiles/Contacts** on the left toolbar.

To Search by Locality:

Searching for Locality Contacts provides contact information for the primary and secondary locality contacts.

1. Click the **Search Profiles/Contacts** or the **Back** button from the Regional Profile screen.

2. Select a **Region** from the FNS drop down list; select a **State** from the State drop down list. When a State is selected, all the Localities within that State will display in the Locality drop down list. If more than one state is selected a locality cannot be selected.

3. Select one or more **Localities** from the Locality drop down list, as shown in Figure 52.

Figure 52. Search by Region, State, and Locality Screen

4. Click on **Search** to display the contacts, as shown in Figure 53.

Figure 53. Locality Profile Results Screen

5. To Print, click the **Print Icon** or to avoid text from being cut off on the printed document click the **View Printer Friendly Version**. This will launch another window with the search results. Click on the word **Print** in the right hand corner of the screen.

6. To return to the Search Contacts page, click on **Back** on the Locality Profile screen or **Search Profiles/Contacts** on the left toolbar.

8 Adding, Modifying, and Deleting Disqualifications

Users have the capability to add, modify or delete disqualification records directly to eDRS. This functionality allows a user to enter recipient and disqualification information directly from a PC. States can elect whether or not to use the approval process for submission of new disqualification records. Additional functionality includes the capability to modify or delete a record as long as the user is from the state that has taken the last action on the record.

8.1   Adding Disqualifications

To Add a Disqualification without an Approval Process:

1. Click **Add/Modify/Delete Disqualifications** under My eDRS in the left menu bar, as shown in Figure 54.

Figure 54. Add/Modify/Delete Disqualifications, Recipient Search Screen

2. Enter the **Last Name**, **First Name**, **Middle Initial**, and **SSN** and click **Search**. The system will search for recipients that are already in the system. If the recipient is not in the system, go to Step 3 below. If the recipient is in the system, click on the SSN of the recipient and then go to Step 5 below.

3. Click the **Add** button, and the Recipient Details screen displays, as shown in Figure 55.

Figure 55. Recipient Details Screen

4. Complete the required Recipient Details fields, **First Name, Last Name, SSN, Birth Date,** and **Sex**.

5. Click **Add Disqualification** button.

Note: Mandatory fields are marked with an asterisk (*). Recipient Information will not be saved until the disqualification details are saved.

6. Enter Disqualification Details including **Disqualification Number, Decision Date, State Reference Number, Start Date, Location, Offense Code, and Penalty Length** as shown in Figure 56. When the Offense Code is entered, the recommended Penalty Length will appear as a reference**.**

Figure 56. Disqualification Details Screen

7. Click the **Save** button to submit the disqualification. A pop-up will display to confirm you want to save the record.

8.   Click **OK** if you want to continue or click **Cancel** if you do not want to save the disqualification record, as shown in Figure 57.

Figure 57. Disqualification Submission Confirmation

9. The Recipients Details Screen will display, display as shown in Figure 58. The user can view the newly submitted disqualification record**.**

Figure 58. Recipient Details Screen

10. To add another disqualification to this record click **Add Disqualification Record**.

11. To modify the recipient details, make the changes and click **Save**. You will receive a message that says: "Recipient record successfully updated."

12. To return to the Recipient Search page click **Cancel.**

To Add a Disqualification with an Approval Process:

1. Click **Add/Modify/Delete Disqualifications** under My eDRS in the left menu bar. The Recipient Search screen will display, as shown in Figure 59.

Figure 59. Recipient Search Screen

2. Enter the **Last Name**, **First Name**, **Middle Initial**, and **SSN** and click **Search**. The system will search for recipients that are already in the system. If the recipient is not in the system, go to Step 3 below. If the recipient is in the system, click on the name of the recipient and then go to Step 5 below.

3. Click the **Add** button and the Recipient Details screen displays, as shown in Figure 60.

Figure 60. Recipient Details Screen

4. Complete the required Recipient Details fields, **First Name, Last Name, SSN, Birth Date and Sex.**

5. Click the **Add Disqualification** button. This will take you to a screen where the disqualification details can be entered.

6. Enter Disqualification Details including: **Disqualification Number, Decision Date, State Reference Number, Start Date, Location, Offense Code**, and **Penalty Length,** as shown in Figure 61.

Figure 61. Disqualification Details Request Approval Screen

7. Click the **Request Approval** button to submit the disqualification. The "Disqualification Successfully Submitted" message will display to confirm your submission, as shown in Figure 62. The disqualification record will be routed to a user with approval authority.

Figure 62. Record Submission Message Screen
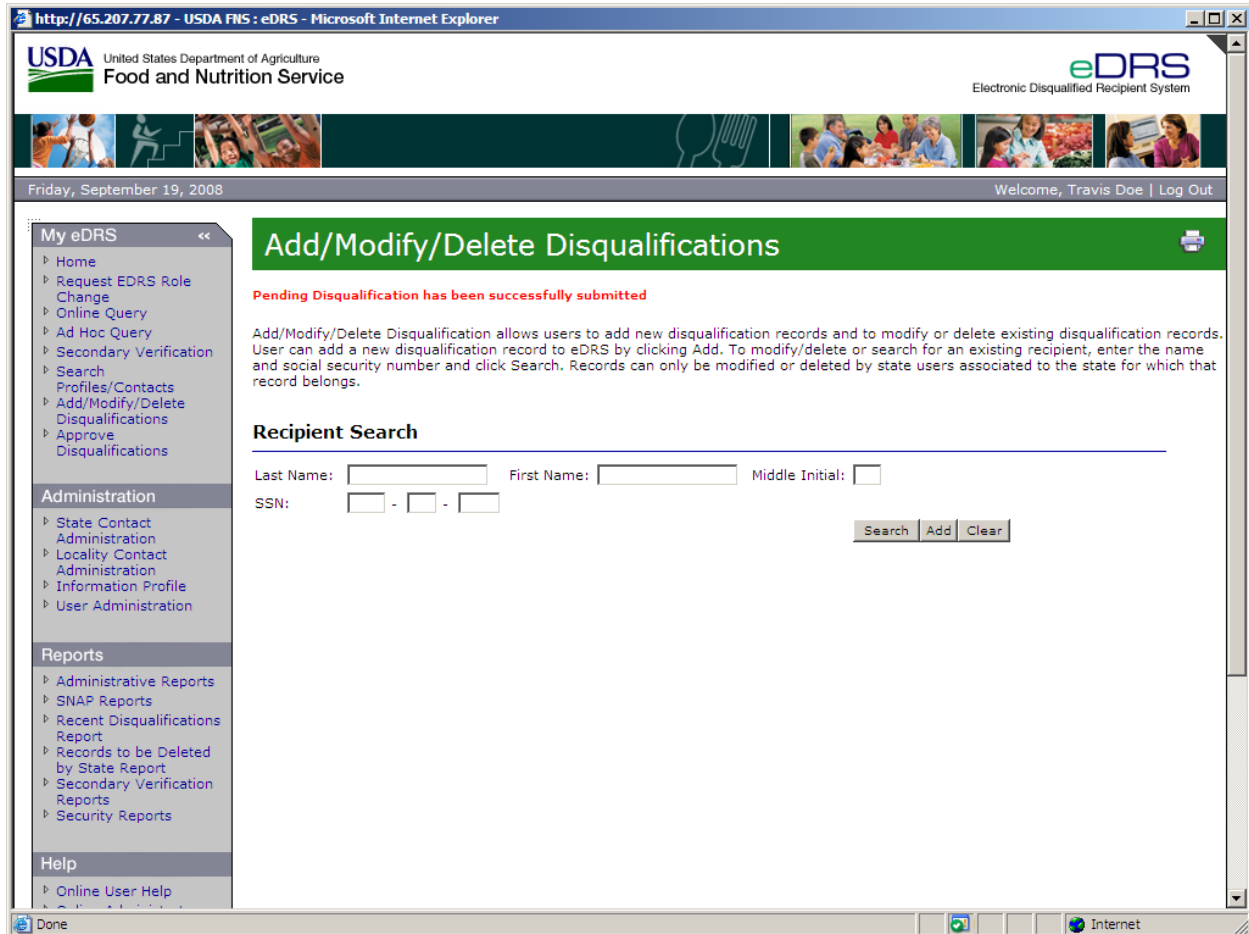
8. Once you have returned to the recipient search screen, you can enter additional disqualifications by following steps 1-7 above.

8.2   Modifying or Deleting Disqualifications

Disqualification records can be modified or deleted by state users. To modify or delete a disqualification record, the system requires that the user be from the state that owns the record. The state that submits the last disqualification record is considered the owner of the recipient's record. Modifying or deleting records works like adding new disqualification records. If a state has elected to use the approval process, modified or deleted records will be routed to the appropriate approvers.

To Modify Disqualification:

1. Click **Add/Modify/Delete Disqualifications** under My eDRS in the left menu bar, as shown in Figure 63.

Figure 63. Add/Modify/Delete Disqualifications Screen

2. Enter the Last Name and/or social security number and click the **Search** button. The search results will display, as shown in Figure 64. Records can only be modified by state users associated to the state for which that record belongs.

Figure 64. Disqualification Record Selection Screen

3. Select the Disqualification Record that you would like to modify by clicking on the **Social Security Number.** The disqualification record will display, as shown in Figure 65.

Figure 65. Recipient Disqualifications Selection Screen

4. Update the Recipient Details fields as necessary.

5. Click the **Save** button to store changes. A message will be displayed confirming the changes, as shown in Figure 66.

Figure 66. Recipient Record Updated Screen

6. To modify the Disqualification Details, select the **Disqualification Number** for the record, as shown in Figure 67.

Figure 67. Modifying Disqualification Records without Approval Process Screen

7. Update the Disqualification Details as necessary. For a state not using the approval process follow steps 8 and 9. For a state using the approval process, go to step 10.

8. For a state that is not using the approval process, click the **Save** button to store changes. As shown in Figure 68, a pop-up box will appear asking you to confirm that you want to modify the disqualification record.

Figure 68. Disqualification Details Modification Confirmation

9. Click **OK** to save the modifications. Click **Cancel** if you do not want to save the modifications.

10. For a state using the approval process, click **Request Approval,** as shown in Figure 69.

Figure 69. Modifying Disqualification Records with Approval Process Screen

11. Once the request has been submitted the user will see a message saying "The pending recipient and disqualification have been successfully completed." Next, you may add, modify, or delete additional records at this time.

To Delete Disqualifications:

Disqualifications records may need to be deleted due to the following conditions:

- If the participant is over the age of 80, the states have the option to delete the disqualification record

- If there is a lack of official documentation related to the disqualification offense, states must delete the record.

Deleting disqualifications records works much like adding and modifying disqualification records. If a state has chosen to use the approval process, the deleted record will be routed to the appropriate approver prior to being deleted. The steps for deleting disqualification records are shown below.

1. Click **Add/Modify/Delete Disqualifications** under My eDRS in the left menu bar, as shown in Figure 70.

Figure 70. Add/Modify/Delete Disqualifications Screen

2. Enter the Last **Name** and/or **SSN** and click the **Search** button, as shown in Figure 71. Records can only be modified by state users associated to the state that submitted the most recent record.

Figure 71. Recipient Search Screen

3.　Select the record that you would like to delete by clicking on the **Social Security Number** as seen in Figure 72.

Figure 72. Disqualification Record Selection Screen

4. Select the Disqualification Number for the record that you would like to delete to view the disqualification details as shown in Figure 73.

Figure 73. Delete Disqualifications Screen

5. Click the **Delete** button to delete record. For states that have not chosen to use the approval process follow steps 6-8. For states that have chosen to use the approval process, go to step 9.

Note: All Disqualifications must be deleted before a Recipient record can be deleted.

6. A confirmation pop-up box will display stating: "Deleting this disqualification will delete this recipient from the system. Are you sure you want to continue?" as shown in Figure 74.

Figure 74. Deleting Disqualification message Screen

7. Click **OK** to delete disqualification, as shown in Figure 74.

8. Click **Cancel** if you do not want to delete the record.

9. For states that choose to use the approval process, as shown in Figure 75, a confirmation pop-up box will display stating "Are you sure you want to delete the Disqualification? Note: The deletion will be marked "pending" and will not take affect until it is approved."

Figure 75. Deleting a Disqualification with Approval Process Message Screen
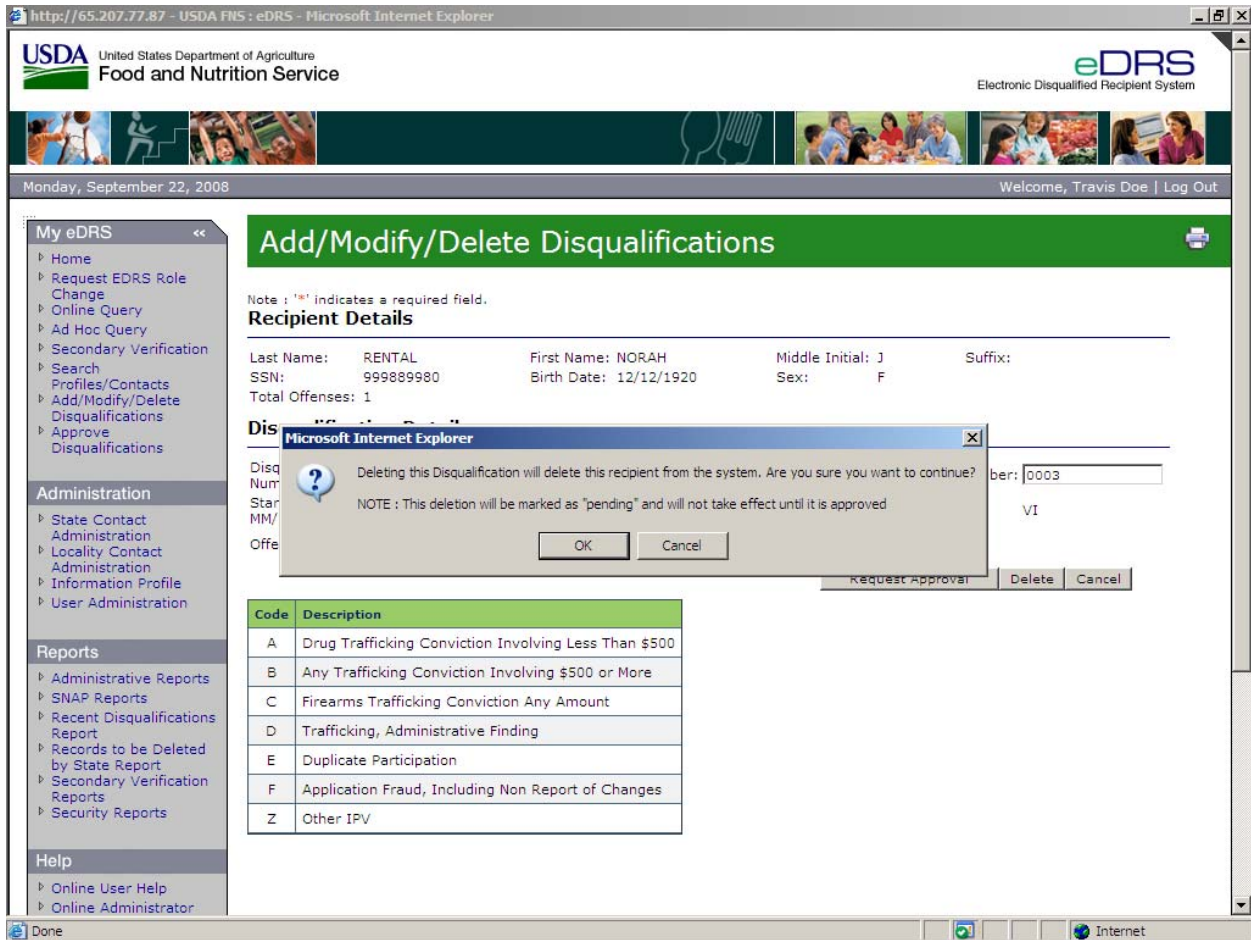
10. Click **OK** to delete disqualification.

11. Click **Cancel** if you do not want to delete the record.

9 Approving Disqualifications

Disqualification Approval allows state users to approve or disapprove disqualifications being added, edited or deleted from eDRS. In order to use this approval screen, states are required to enable the eDRS approval process in the Information Profile screen. Instructions for enabling the approval process and changing the level at which the approval process takes place (state or locality) can be found in the Administrator's Guide.

To approve disqualifications:

1. Click **Approve Disqualifications** under My eDRS in the left menu bar, as shown in Figure 76. You will see the pending disqualifications that are assigned to you.

Figure 76. Approve Disqualifications Screen

2. Select the Pending Disqualification to be approved by clicking on the **Social Security Number** for that record to display the Disqualification Approval Details Screen, as shown in Figure 77.

Figure 77. Disqualification Approval Details Screen

3. Review the Recipient and Disqualification Details for accuracy and modify as necessary.

4. Click the **Approve** or **Disapprove** button to update the status of the record**.**

5. After clicking the Approve button, the "Pending Disqualification Record has been successfully added" message will display, as shown in Figure 78.

Figure 78. Disqualification Record Successfully Added Screen

6. After selecting the Disapprove button, the "Pending Disqualification Record has been successfully deleted" message will display, as shown in Figure 79.

Figure 79. Disqualification Record Deleted Message Screen
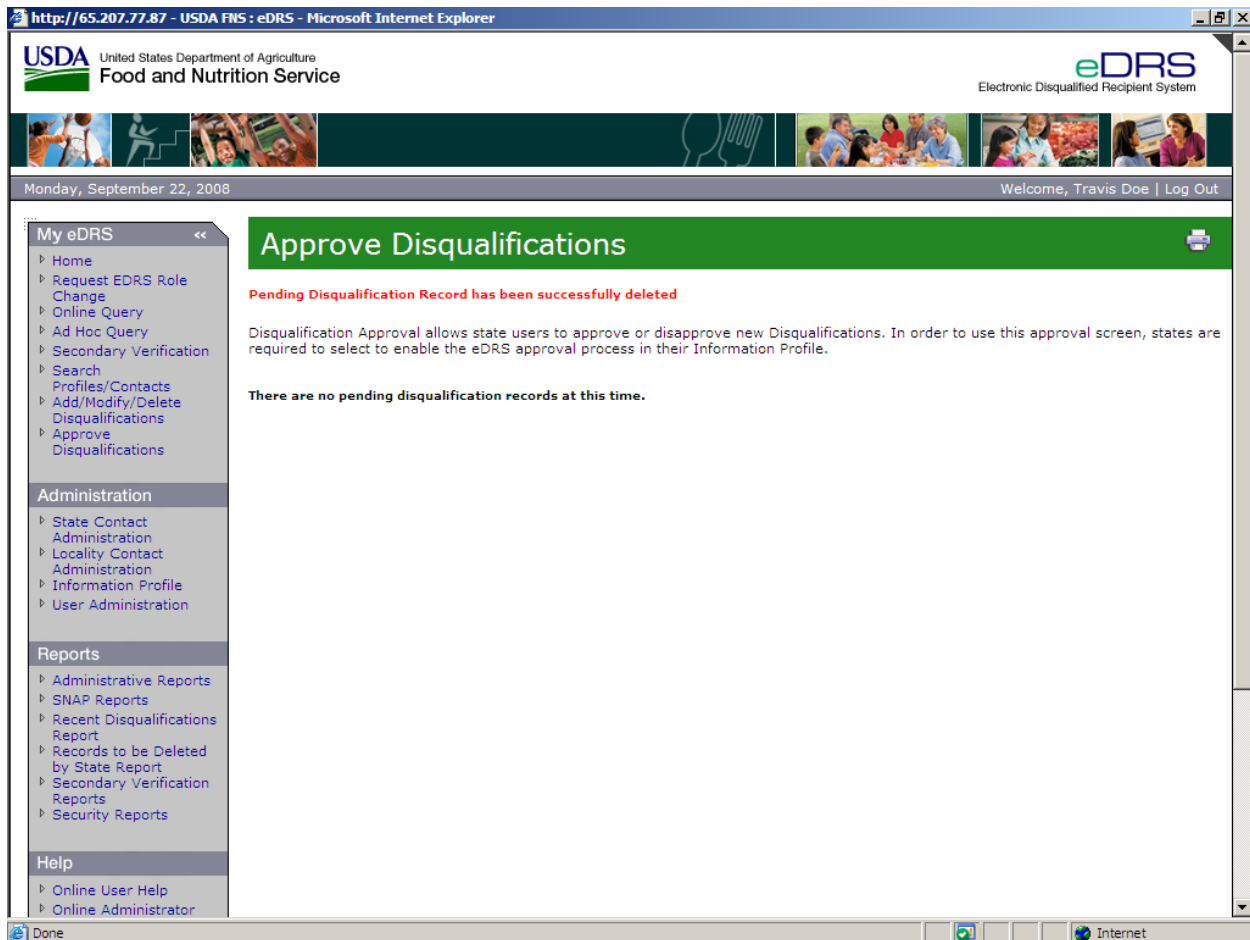
7. Once you have clicked approve or disapprove you will be returned to your inbox with pending disqualifications requiring approval.

10   Generating Reports

Users can review system activity and disqualification data through the use of reports. Reports allow them to monitor the system to ensure that it is actively being utilized, that system integrity and security is intact, and to monitor trends within the system. For example, if one region is not using the system, this will alert the Program Accountability Manager(s) that something is not working for a particular state or region. Reporting functionality allows FNS to make sure the system is being used properly and efficiently.

Note: Reports are available in three different formats, PDF, MS Word, and Excel. Excel is only available for SNAP Reports.

10.1 SNAP Reports

The SNAP Reports function allows the users to generate reports related to disqualification records. These reports can be used to verify state submission of information and to summarize disqualification information. The SNAP reports available are:

- Disqualifications Determination by Type of Offense – Lists number of disqualifications by offense type.

- Edit Error Summary Report – Provides a summary of errors found while uploading to eDRS and displays the number and type of error.

- Edit Error Detail Report – Provides details on disqualification records that had warnings or fatal errors while uploading to eDRS.

- Database Record Count Report – Provides the number of recipients by disqualification number.

- Fiscal Year Report – Provides a count of the number of decisions made during a fiscal year "as of" the requested date.

- Monthly Database Status Report Differences – Lists the number of disqualification records submitted for the selected range of time.

- Monthly Disqualification Input Data Report – Provides monthly trend of input data.

- Net Record Changes – Provides a count of the number of record changes for a specified timer period.

- Pending Disqualifications Report – Provides a list of disqualifications that are marked as Pending in eDRS.

- Six Month History of Database Adds –Provides six month trend of adds to the database from both online and batch states.

- Total Recipients per Number of Disqualifications – List the number of recipients by disqualification number.

- Total Disqualifications Determined – Provides a list of total disqualifications in eDRS.

- User Activity Reports – Provides reports on state user activity such as number of queries run, number of types of queries run, and number of query "hits" (i.e., successfully returning records).

- Data File Transmission Report – Provides a transaction log during the time period specified of all files pushed and pulled.

To run a SNAP report:

1. Click on **SNAP Reports** under Reports on the left menu bar. The SNAP Reports screen displays as shown in Figure 80.

Figure 80. SNAP Reports Screen

2. Select the Report Type in the **Report Type** drop down list, as show in Figure 81.

Figure 81. SNAP Reports Report Type Screen

3. Select the **Reg**i**on** for which you would like to run the report. Region is a required field for running this report. You can select All Regions by clicking on the **Select All Regions** box.

Note: Selecting a State can narrow the report's results.

4. Enter the **Start Date,** or, click on the calendar icon and select a start date for the data that will be included in the report. The start date is a required field for running some SNAP reports.

*Note: Some reports do not use the **Start Date** field. Some reports use only month/year dates.*

5. Enter the **End Date,** or, click on the calendar icon and select an end date for the data that will be included in the report. The end date is a required field for some SNAP reports.

*Note: Some reports do not use the **End Date** field. Some reports use only month/year dates.*

6. Select the **State** (if so desired) for which you would like to run the report.

7. Select the **File Type** (if so desired) in the **Select File Type** drop down list. File type allows the user to choose which format they would like to use to view the requested report. The three types are:

    –   PDF

    –   MS Word

    –   MS Excel

8. Click the **Submit** button to view the report.

9. To print report, select the **Print** icon form the MS Word, MS Excel, or PDF toolbar.

10. To clear the page and use new/different parameters, click the **Clear** button.

10.2 Recent Disqualifications Report

The Recent Disqualifications Report will display the recent disqualifications that have occurred for your state during a selected range of time.

> **To run a Recent Disqualifications Report:**

1. Click on **Recent Disqualifications Report** under Reports on the left menu bar. The Recent Disqualifications Report screen will display, as shown in Figure 82.

Figure 82. Recent Disqualifications Report Screen

2. Enter the **Start Date** or click on the calendar icon and select a start date for the data that will be included in the report. The start date is a required field for running this report.

3. Enter the **End Date,** or click on the calendar icon and select an end date for the data that will be included in the report. The end date is a required field for running this report.

4. Select the **State** (if so desired) for which you would like to run the report.

5. Select the **Locality** (if State is chosen and if so desired) for which you would like to run the report.

6. Select the **File Type** in the Select File Type drop down list. File type allows the user to choose which format they would like to use to view the requested report. The two types are:

    - PDF

    - MS Word

7. Click the **Submit** button to view the report.

8. To print the report, select the **Print** button on the top right side toolbar in the report.

Note: To ensure that text is not cut off, choose the landscape print layout.

9. To clear the page and use new/different parameters, click the **Clear** button.

10.3 Records to be Deleted by State

The Records to be Deleted by State function allows users to generate reports on view disqualifications records that will be deleted by State.   This report is of individuals in the eDRS database that are at least 80 years of age. Since State agencies must indefinitely retain documentation in support of the records in eDRS, FNS allows States to delete from their own records and from eDRS all records identified in this report.

To run Records to be Deleted by State Report:

1. Click on **Records to be Deleted by State Report** under Reports on the left menu bar. The Records to be Deleted by State Reports screen will display, as shown in Figure 83.

Figure 83. Records to be Deleted by State Report Screen

2. Select the **State** (if so desired) for which you would like to run the report.

3. Select the **File Type** in the select file type drop down list. The File Type allows the user to choose which format they would like to use to view the requested report. The two types are:

    – PDF
    – MS Word

4. Click the **Submit** button to view the report.

5. To print the report, select the **Print** icon from the PDF or MS Word toolbar.

6. To clear the page and use new/different parameters, click the **Clear** button.

10.4 Secondary Verification Report

The Secondary Verification Reports allow the users to generate reports related to secondary verification requests. These reports can be used to verify state submission of information and to summarize disqualification information.

To run a Secondary Verification Report:

1. Click on **Secondary Verification Reports** under Reports on the left menu bar. The Secondary Verification Reports screen will appear, as shown in Figure 84.

Figure 84. Secondary Verification Reports Screen

2. Select the report type in the **Report Type** drop down list, as shown in Figure 85.

Figure 85. Secondary Verification Report Type Screen

3. Enter the **Start Date** or click on the calendar icon and select a start date, for the data that will be included in the report. The start date is a required field for running this report.

4. Enter the **End Date** or click on the calendar icon and select an end date for the data that will be included in the report. The end date is a required field for running this report.

5. Select the **Display Request** for which you would like to run the report. Display Request is a required field for running this report.

6. Select the **State** (if so desired) for which you would like to run the report.

7. Select the **File Type** in the Select File Type drop down list. File type allows the user to choose which format they would like to use to view the requested report. The two types are:

    –   PDF
    –   MS Word

8. Click the **Submit** button to view the report.

9. To print the report, select the **Print** icon from MS Word or PDF toolbar.

10. To clear the page and use new/different parameters, click the **Clear** button.

11 Accessing Help and Submitting Feedback

This chapter explains how to obtain help while using eDRS. There are two methods through which to obtain help through eDRS:

- Online Help – Detailed help guides that can be accessed through the application to provide you with step-by-step instructions for each function performed within the system.

- eDRS Help Desk – Provides assistance for any issues or problems you may have with the system. You can contact them via e-mail, an online form, or by telephone.

You can also submit feedback about eDRS through online Feedback.

Note: All password related issues should be directed to the eAuthentication Help Desk at eAuthenticationHelpDesk@USDA.gov.

11.1 Online Help

Online Help is organized according to sections within eDRS and is broken down into subsections accordingly.

To use the Online Help functionality:

1. Click **Online User Help** in the menu bar to display the Help screen.

2. To view a topic within Online Help:

   - Click the topic on the help screen for which you wish to obtain help to display a screen for that topic

   - Click the plus (+) sign next to a topic to display a sub-menu for that topic and then click on one of the sub-topics. For example, click Online Query to display step-by-step instructions for the Online Query function.

11.2 eDRS Help Desk

To access the eDRS Help Desk information, go to the eDRS Home page and refer to the bottom left hand corner of the page under eDRS Help Desk, or click on eDRS Help Desk in the menu bar. The eDRS Help Desk provides you with three methods for communicating with the Help Desk:

1. Calling the Help Desk directly at (866) 557-8330, 6:00AM-6:00PM ET.

2. Submitting an Online Form through the link provided on the eDRS Home screen or on the eDRS Help Desk screen that can be accessed in the menu bar. The Online Form will display and will ask for the following information:

   - Name

   - E-Mail

   - Phone

   - Select your Problem Area – Select the appropriate radio button

   - Problem – Provide additional information based on the radio button chosen

   - Additional Information – Any additional information that may assist the Help Desk in determining the best way in which to resolve your problem(s)

Enter all required information and click the **Submit** button to submit the form to the Help Desk.

3. Sending an e-mail directly to the Help Desk at eDRSHelpDesk@fns.usda.gov describing your problem(s).

11.3 Feedback

Users have the option of submitting feedback to FNS regarding the eDRS application. This option is to allow users to provide any suggestions or comments they may want to share in terms of improving the system, changing the system, etc. They can access this option by clicking on **Feedback** in the menu bar. This will bring up an e-mail screen through your current e-mail where you can provide feedback, suggestions, concerns, etc.

Note: You may use this communication channel to submit comments about eDRS. However, if you need an answer to a specific question or have encountered a problem with using the system, please contact the Help Desk.
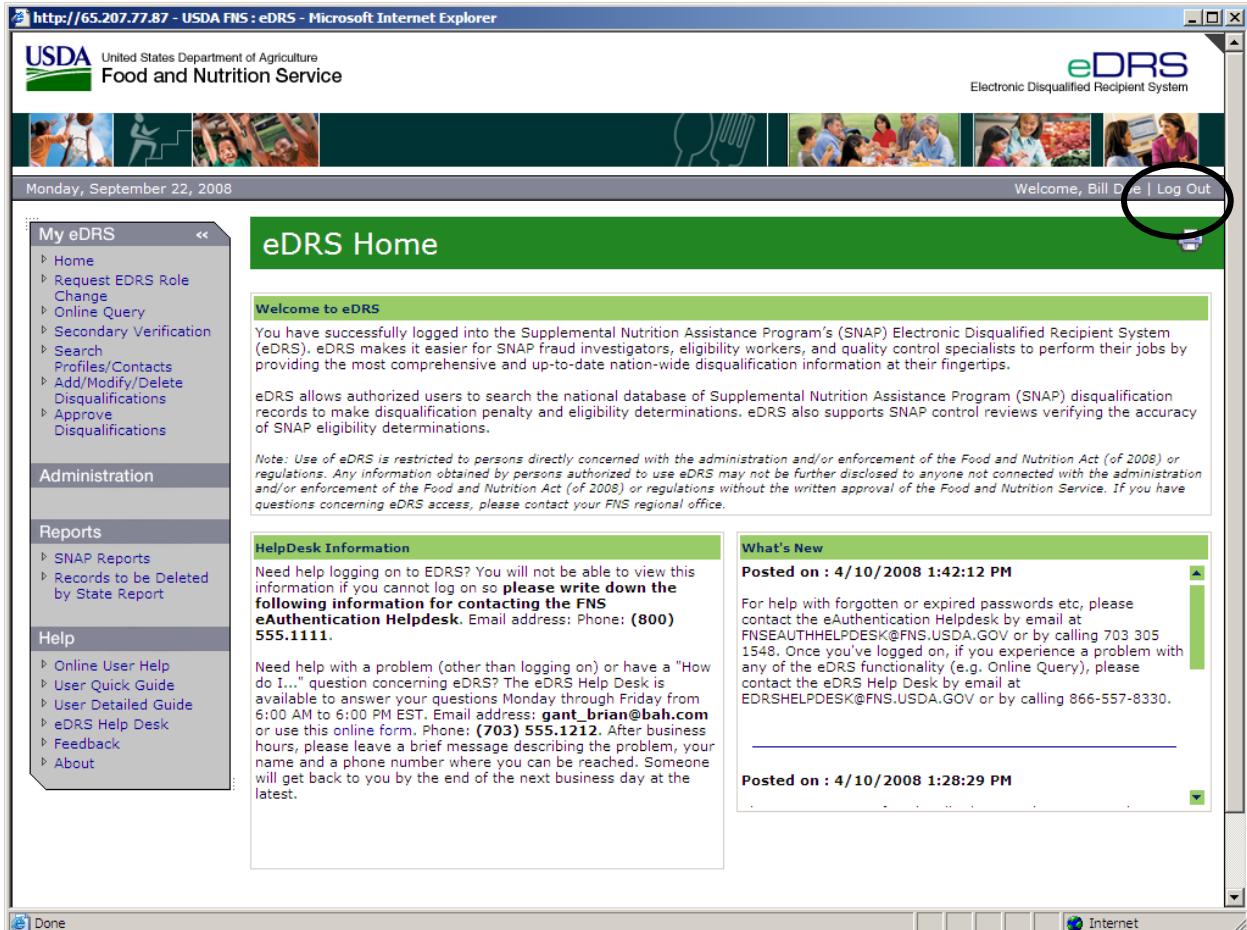
12 Logging Out

The Logout function allows you to log out of the eDRS application.

To log out of the application:

1. Click **Log Out** at the top right of the screen, as shown in Figure 86.

Figure 86. eDRS Home Page Screen, Logout

Upon logging out of eDRS, you will be taken back to the eDRS Usage Terms and Conditions screen. At that point you can close your browser completely.

13 Appendix A: Glossary

Decision Date	A hearing renders a decision the date official in an administrative disqualification hearing or a court of law or the date that the individual signed either a waiver of their right to an administrative disqualification hearing or a disqualification consents agreement.
Disqualification Number	The IPV descriptor used for penalty period determinations. Multiple records for the same person may have the same disqualification number.
DRS	Disqualified Recipient System
eDRS	Electronic Disqualified Recipient System
FNS	Food and Nutrition Service
FSO	FNS Security Officer
Headquarters	FNS National Headquarters in Alexandria, VA.
HTTP	Hyper Text Transport Protocol
HTTPS	Hyper Text Transport Protocol Secure
IE	Internet Explorer
IPV	Intentional Program Violations
Locality	A distinct portion of a State, often a county, with an individual identifier.
Locality Code	A unique numeric identifier for a Locality within a State. Either a FIPS code or a State-designated Locality Code may be used.
Locality Contact	The person designated to provide secondary verification of disqualification record matches found through DRS. The Computer Matching and Privacy Act of 1988 requires that all matches be verified through a secondary source.
PC	Personal Computer
Penalty Determination	An investigator to determine whether an IPV suspect has any prior disqualifications and, therefore, determine the appropriate penalty period can use data within DRS.

Penalty Length	The length in months of a penalty for an IPV. Penalty length is specified by the judge issuing the disqualification decision, and may range from zero months to permanent—recorded as "99" in DRS.
QA	Quality Assurance
QC	Quality Control. Option used by Quality Control workers to verify eligibility of a recipient as of the current QC review date.
Regional Office	The Regional FNS Office that administers a group of States.
Regions/States	The Regional FNS Office that administers a group of States. Currently there are seven (7) Regions.
SNAP	Supplemental Nutrition Assistance Program
SSN	Social Security Number
SSO	State Security Officer
Start Date	The date on which the penalty for disqualification begins.
USDA	United States Department of Agriculture