Electronic Disqualified Recipient System

eDRS

Administrator's Guide

USDA United States Department of Agriculture
Food and Nutrition Service

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1 Introduction

This document provides a guide for administering and 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 changes to system or program requirements. This document is organized into several sections:

- Preparing to Use eDRS
- Accessing eDRS
- Maintaining eDRS
- Generating Reports
- Accessing Help and Submitting Feedback
- Logging Out

The Electronic Disqualified Recipient System (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 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 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 online system.

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 (HQ), and the seven regional offices that administer the Supplemental Nutrition Assistance Program (SNAP).

In each region/state, there are five types of "Administrative User" that are necessary to support the administration of the system. These include:

- *eDRS Regional Coordinator (RC)* – This role provides regional program oversight for states and has access to online query, FNS Contact Administration, Information Profile, and State Contact Administration. Also, the Regional Coordinator has access to all reports for the states within their region.
- *Regional Security Officer (RSO)* – This role provides regional security oversight that has access to FNS Contact Administration, Information Profile, and State Contact Administration. In addition, the RSO has access to Administrative, SNAP, Records to be Deleted by State, and Security Reports for the states within their region.
- *State Administrator (SA)* – The SA responsibilities include providing oversight for state submissions to eDRS and include maintaining the information profile which lists the states technical information, assigning locality contacts, and state contact administration. The SA can access functionality such as online query and secondary verification. Additionally, the SA can view all reports for their state.

- *Systems Monitor* – The Systems Monitor role is for a State Supplemental Nutrition Assistance Program user from a State that uses eDRS for query purposes. This role allows users to use online query, secondary verification, information profile, and state contact administration functionality. Also, the Systems Monitor has access to all the reports in the system and access is restricted to State Administrative staff.
- *Non-Participating State Administrator* - This role provides Non-Participating (batch) States the ability to manage (add, modify, delete) state and locality contacts online and view a limited number of reports.

There are two additional types of "Administrative Users" who support eDRS at the national FNS Headquarters:

- *National Coordinator (FNS Headquarters)* – The eDRS National Coordinator provides national oversight to the eDRS program and has responsibility for adding, modifying, and deleting FNS SNAP and IT/Security contacts, and maintaining roles. Additionally, the National Coordinator has access to all reports including: Administrative, Disqualification, SNAP, Secondary Verification, Records to be deleted by State, and Security Reports.
- *FNS Security Officer* – The FNS Security Officer provides Federal IT and Security oversight to eDRS. This user reviews and approves non-state requests for eDRS user accounts (i.e., FNS HQ users) and has access to functionality such as user role management, reports, and searching profiles and contacts.

A separate User's Guide was created to support the "Business Users" of the system.

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

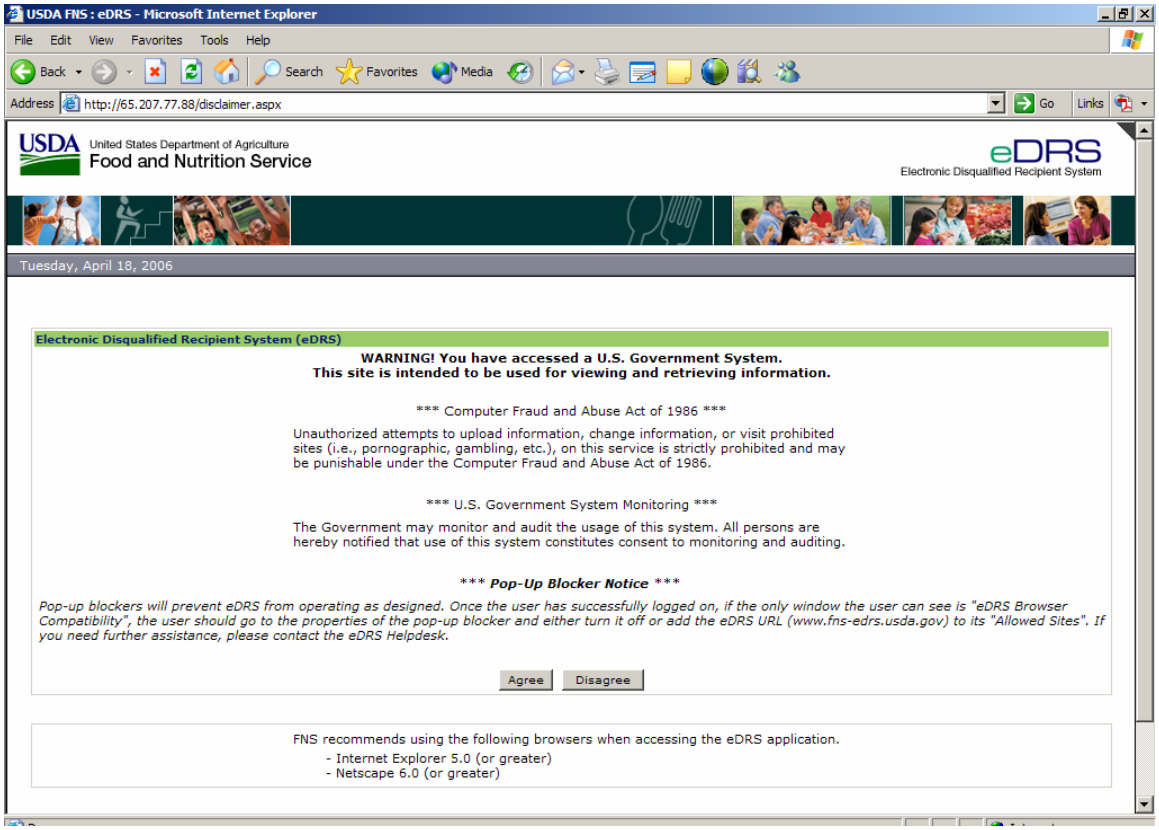
The following browsers can be used to access eDRS:

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

To configure the Netscape browser:

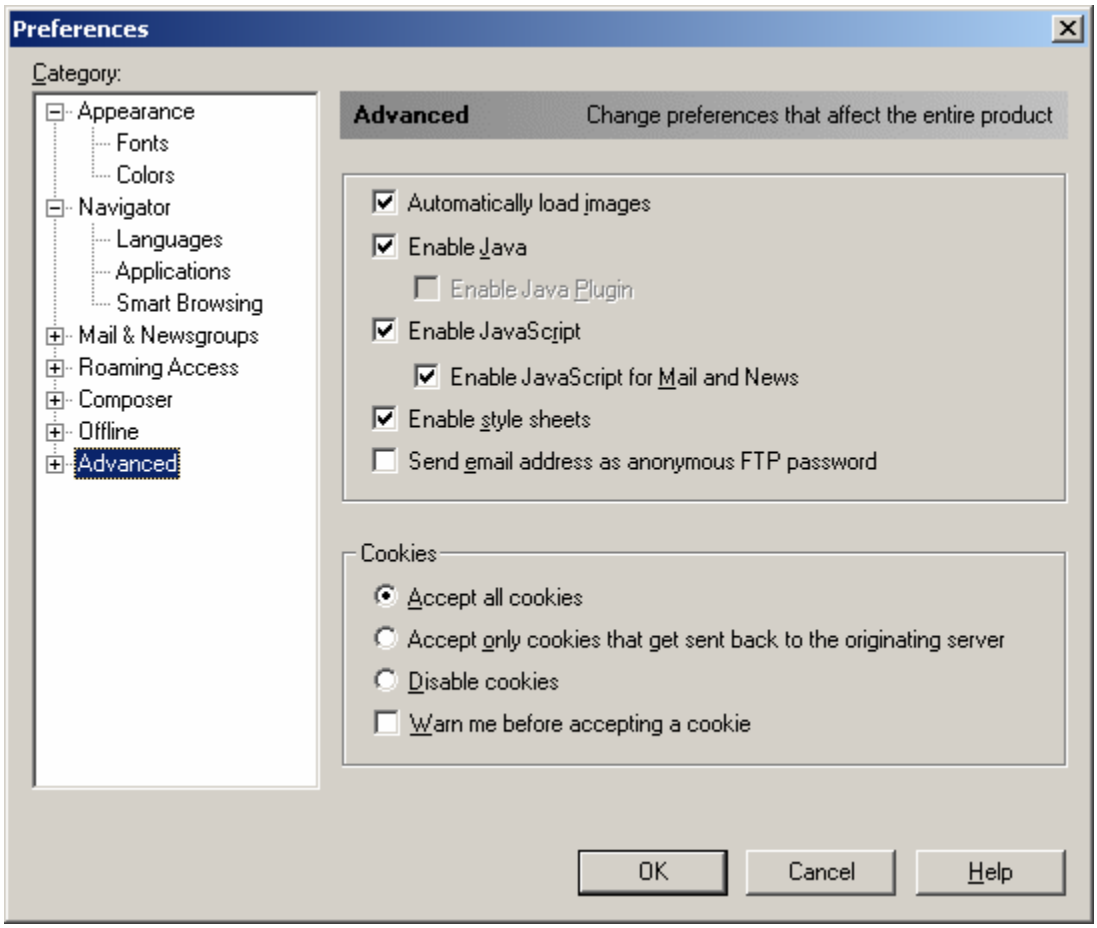
1. Launch your browser.
2. Select **Preferences** from the Edit menu as shown in Figure 1.

Figure 1. Netscape Browser Configuration



This displays the Preferences screen, shown in Figure 2.

Figure 2. Netscape Browser Preferences Screen

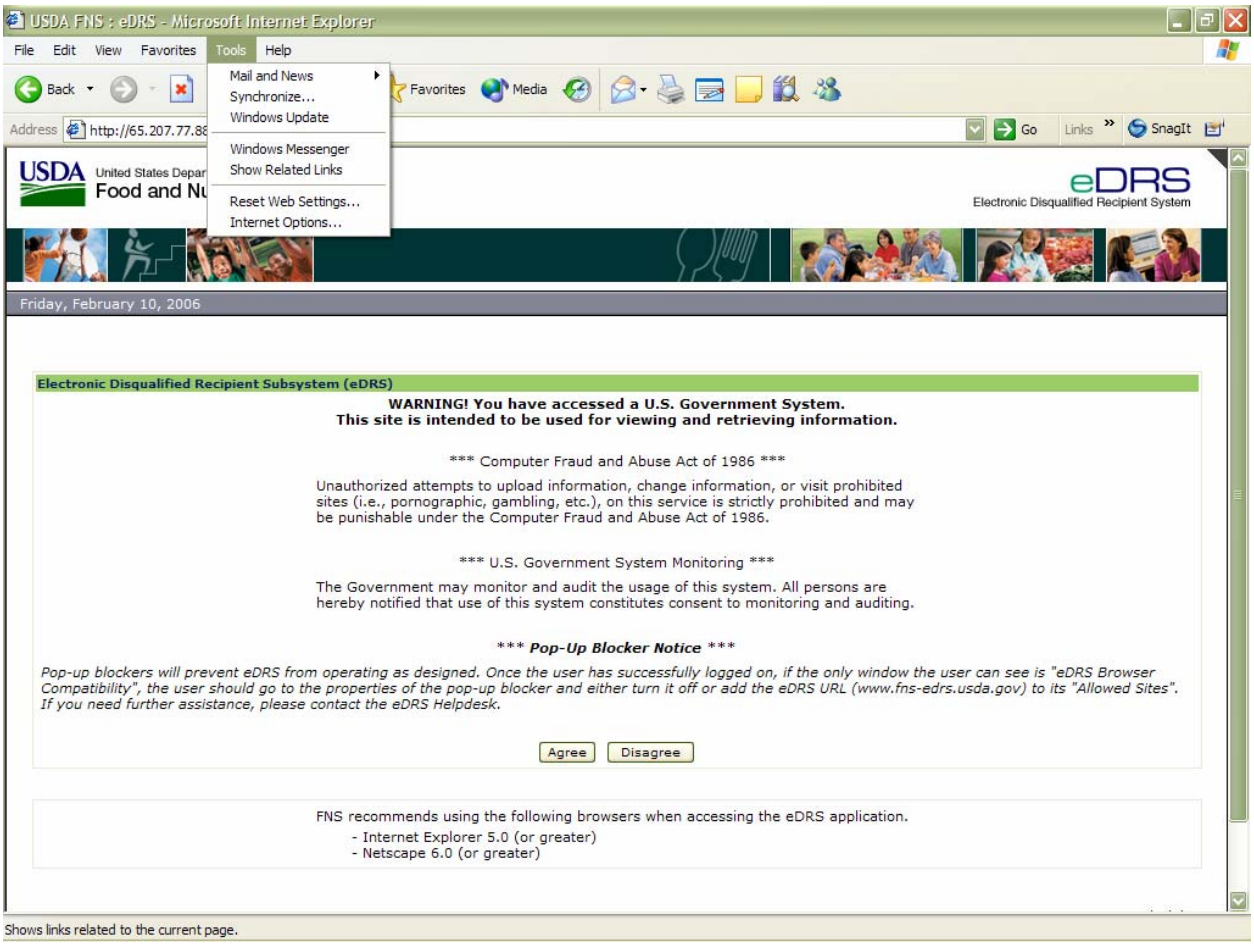


3. Click the **Advanced** tab.
4. Ensure that the following options are checked in the Advanced window:
   - Automatically load images
   - Enable Java
   - Enable JavaScript
   - Enable JavaScript for Mail and News
   - Enable style sheets
   - Accept all cookies
5. Click the **OK** button.

To configure the Internet Explorer browser:

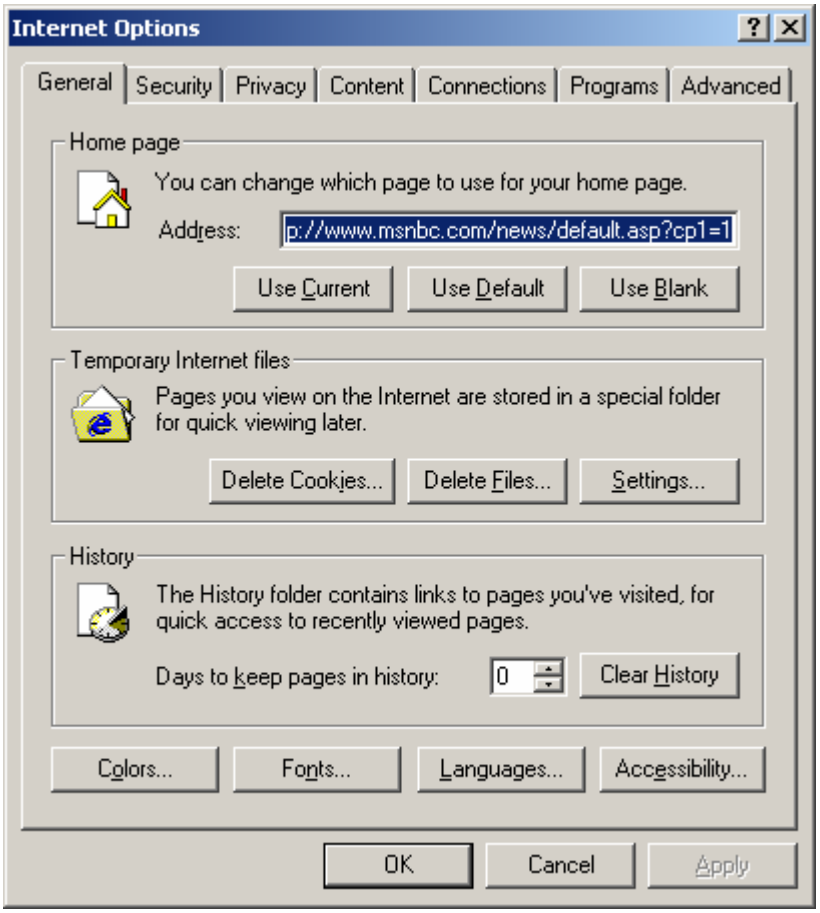
1. Launch your browser.
2. Select **Internet Options** from the **Tools** Menu as shown in Figure 3.

Figure 3. Internet Explorer Browser Configuration



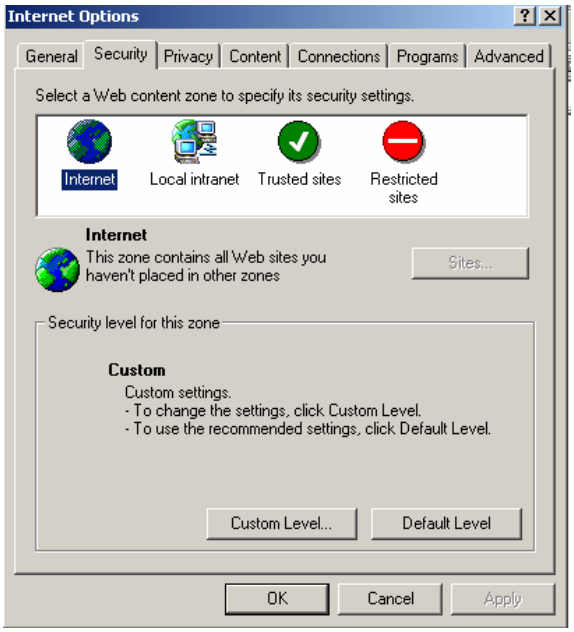
This displays the Internet Options screen, shown in Figure 4.

Figure 4. Internet Explorer Browser Internet Options Screen



3. Click the **Security** tab. This displays the screen shown in Figure 5.

Figure 5. Internet Explorer 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

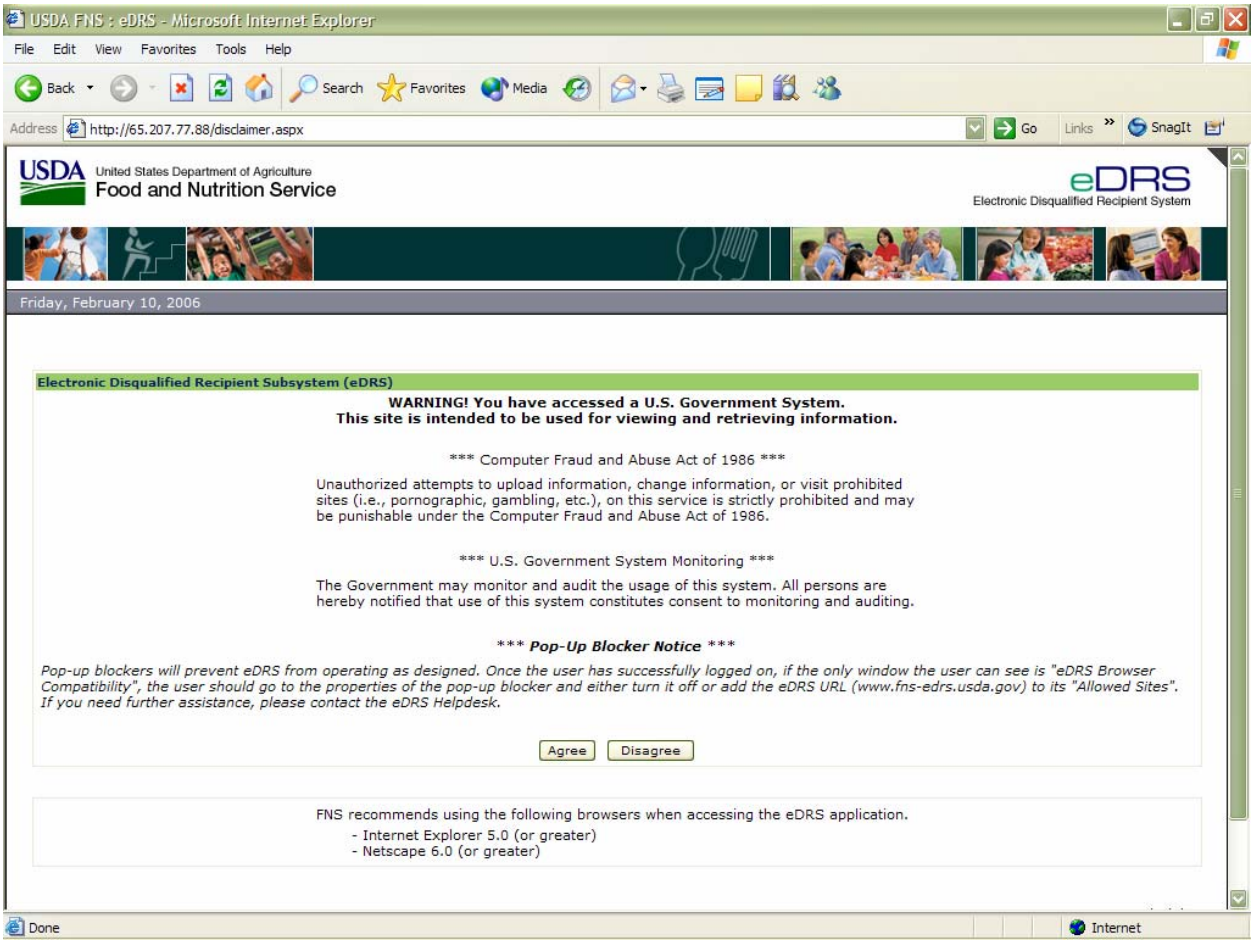
This chapter explains accessing eDRS, requesting a username and password, and logging into the eDRS application.

3.1 Logging in to 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 screen shown in Figure 6 will appear.

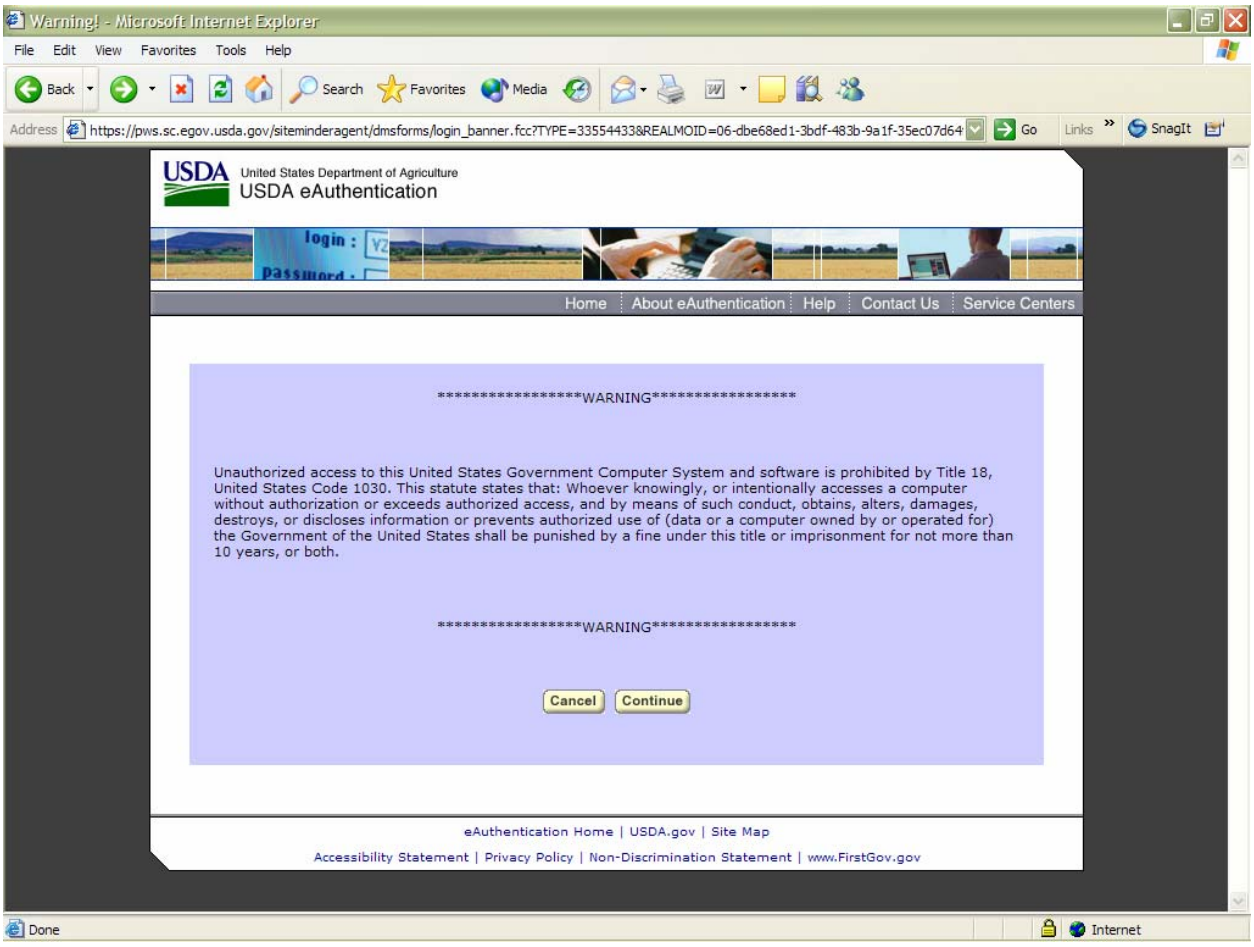
Figure 6. eDRS Terms and Conditions Screen



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 7. If you are already logged into eAuthentication your browser will go directly to the eDRS welcome screen seen in Figure 9.

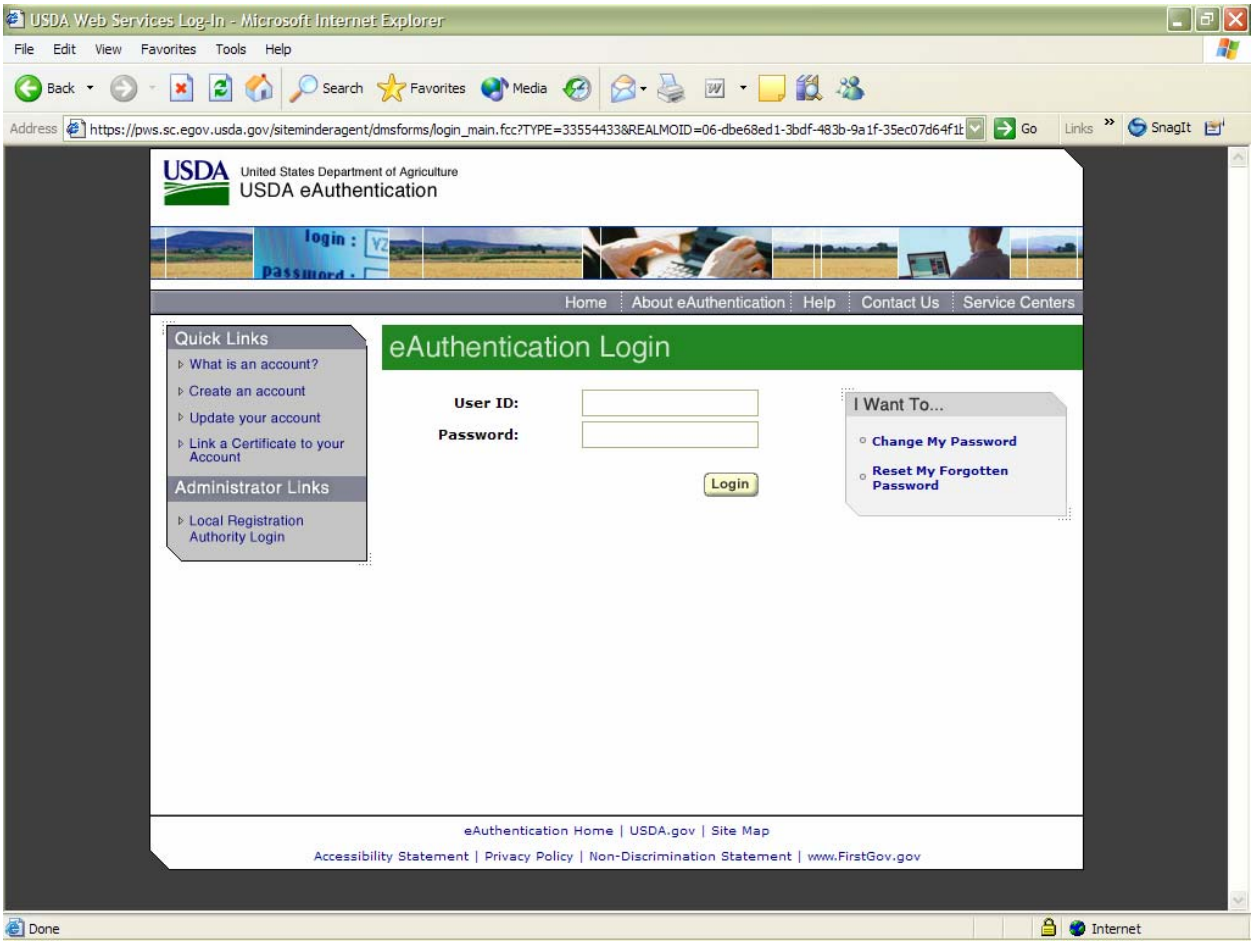
Note: Pop-up blockers will prevent eDRS from operating as designed. Once the user has successfully logged on, if the only window the user can see is "eDRS Browser Compatibility," the user should go to the properties of the pop-up blocker and either turn it off or add the eDRS URL (https://www.fns-edrs.usda.gov)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

Figure 7. eAuthentication Access Screen



3. After selecting **Continue**, the eAuthentication Login screen will appear as shown in Figure 8.

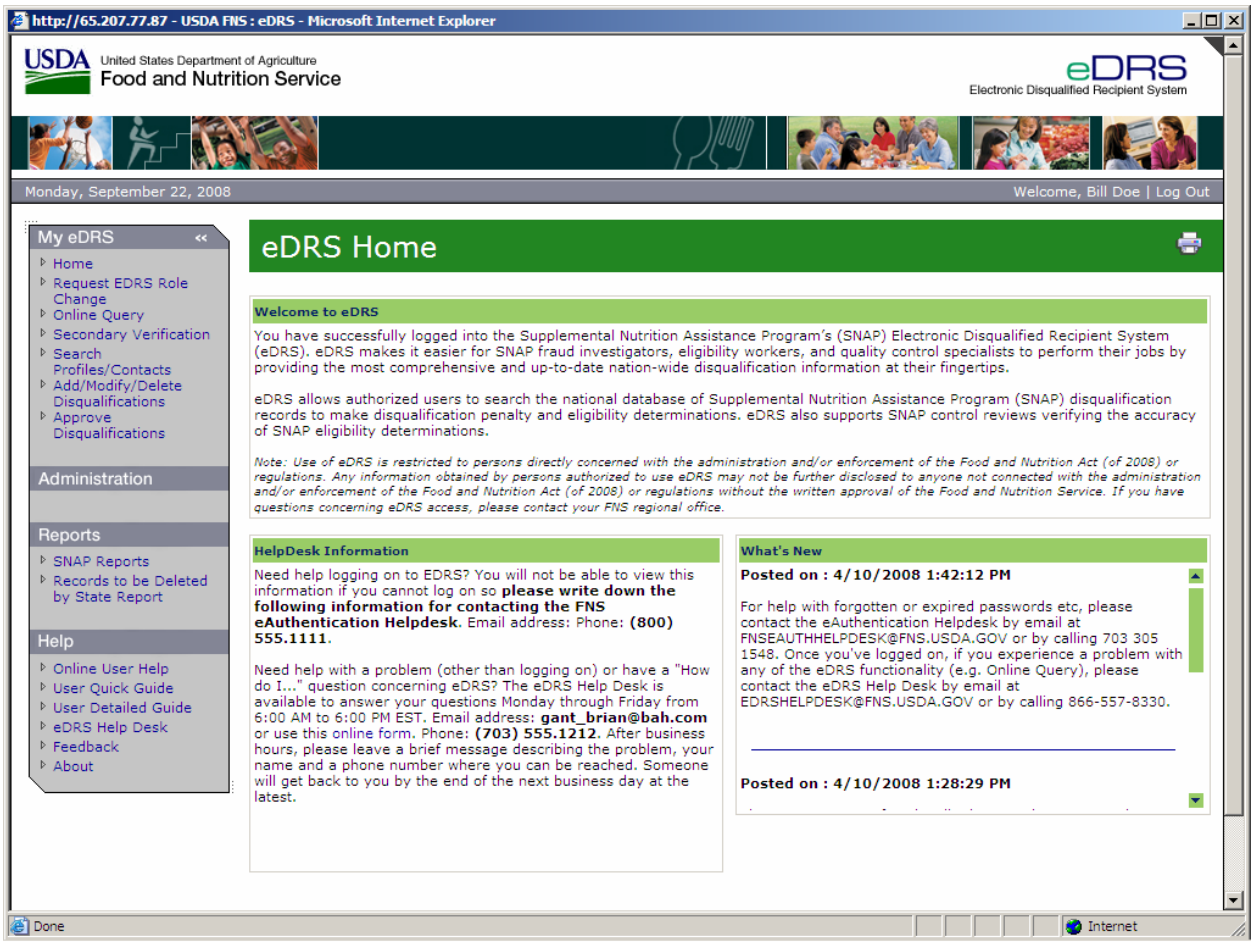
Figure 8. eAuthentication Login Screen



4. After successfully logging into eAuthentication, the eDRS Home Page displays as shown in Figure 9.

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

Figure 9. 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 on 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, locate the user's account, and activate it.

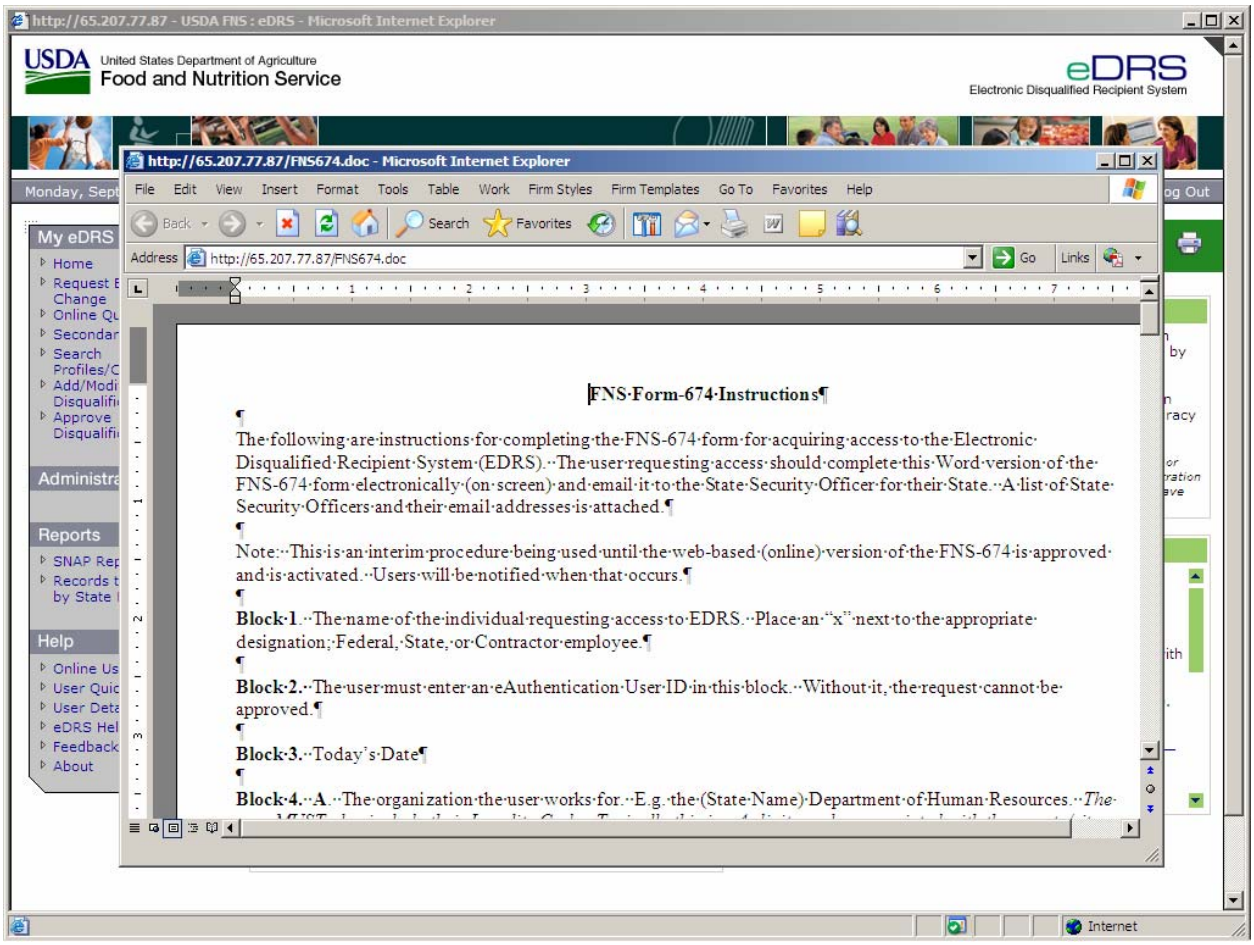
To request an eDRS Account:

1. Follow the instructions from Section 3.1 to Access eDRS. Once you have logged on to eAuthentication, you will receive an error message stating you will not have access to 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 Authorizing Official for approval. Your eDRS account will be created by the Regional Security Officer 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 10.

Figure 10. FNS Form-674 Instructions Window



3. Follow the form's instructions and complete all required information. Indicate on the form the rights and/or privileges you need to access.
4. Provide completed form to your State Security Officer (SSO) for approval and signature.
5. Once approved by your SSO your signed form needs to be forwarded to your Regional Authorizing Official for approval. Your eDRS account will be created by the Regional Security Officer and you will be notified once it has been activated.

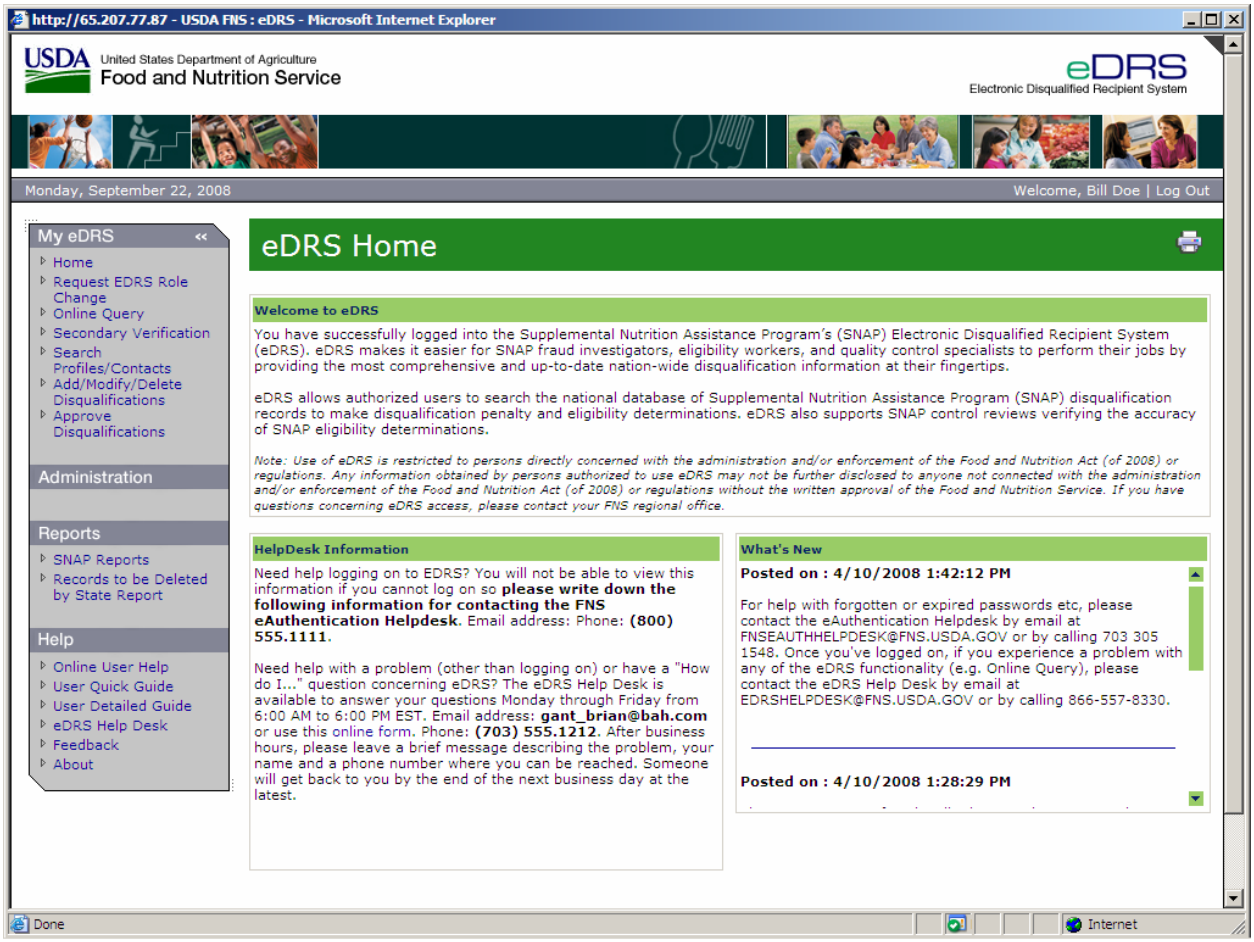
4 Maintaining eDRS

This chapter explains the different functions that are performed by the five main types of eDRS Administrators: National Coordinator, FNS Security Officer, Regional Security Officer (RSO), Regional Coordinator (RC) and State Administrator (SA) to maintain the eDRS application activities performed by the users. The functions include managing contacts, maintaining the Information Profile, and managing roles.

To perform administrative functions:

1. Log into the application, as explained in Section 3.1; logging in will bring you to the eDRS Home Page Screen, shown in Figure 11.

Figure 11. eDRS Home Page Screen



2. Under Administration, one (or more) of the following menu items will appear based on your role within eDRS:
   - **FNS Contact Administration**: Allows designated users to add, modify or delete FNS regional and headquarters contact information
   - **State Contact Administration**: Allows designated users to add, modify or delete state contact information

- **Locality Contact Administration**: Allows designated users to add, modify or delete locality contact information
- **Information Profile**: Allows designated users to add, modify, or delete state technical information
- **Approval Management:** Allows designated users to manage the online approval process
- **Role Administration**: Allows designated users to manage user roles
- **What's New Administration**: Allows designated users to add, modify and delete content in the What's New section of the eDRS home page

4.1 Performing FNS Contact Administration

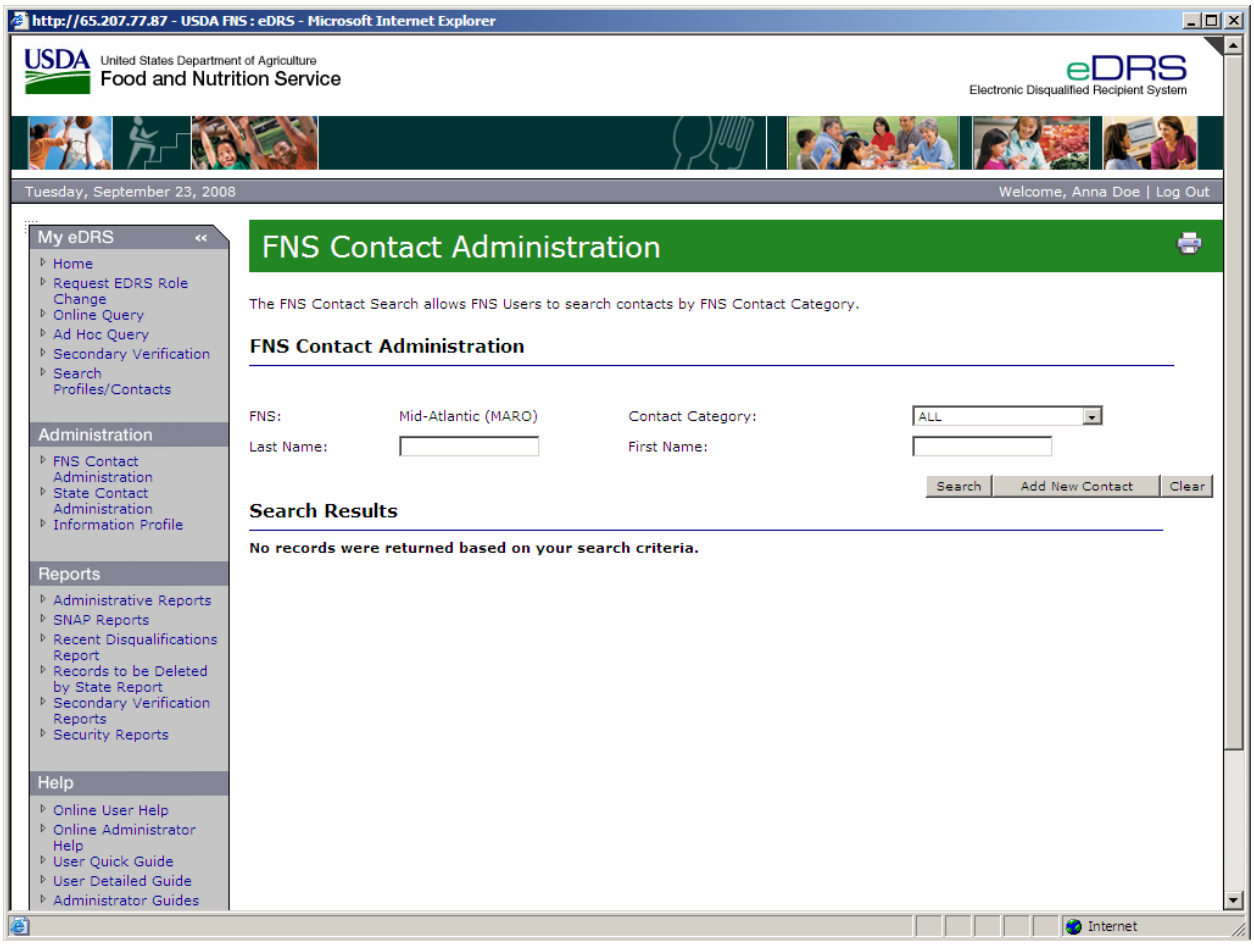
The FNS Contact Administration function allows the user to search, add, modify and delete FNS contacts. There are two FNS Contact Types: SNAP which represents the program contacts and IT and Security which represents FNS IT and Security Officer contacts. Only designated FNS users have access to the FNS Contact Administration screens.

Note: FNS contacts may or may not be users of eDRS.

To add an existing user as a FNS contact:

1. Click **FNS Contact Administration** under Administration on the left menu bar, as shown in Figure 12. The FNS Contact Administration page defaults to the FNS location to which your user profile is related. The search results display the FNS contacts for your location.

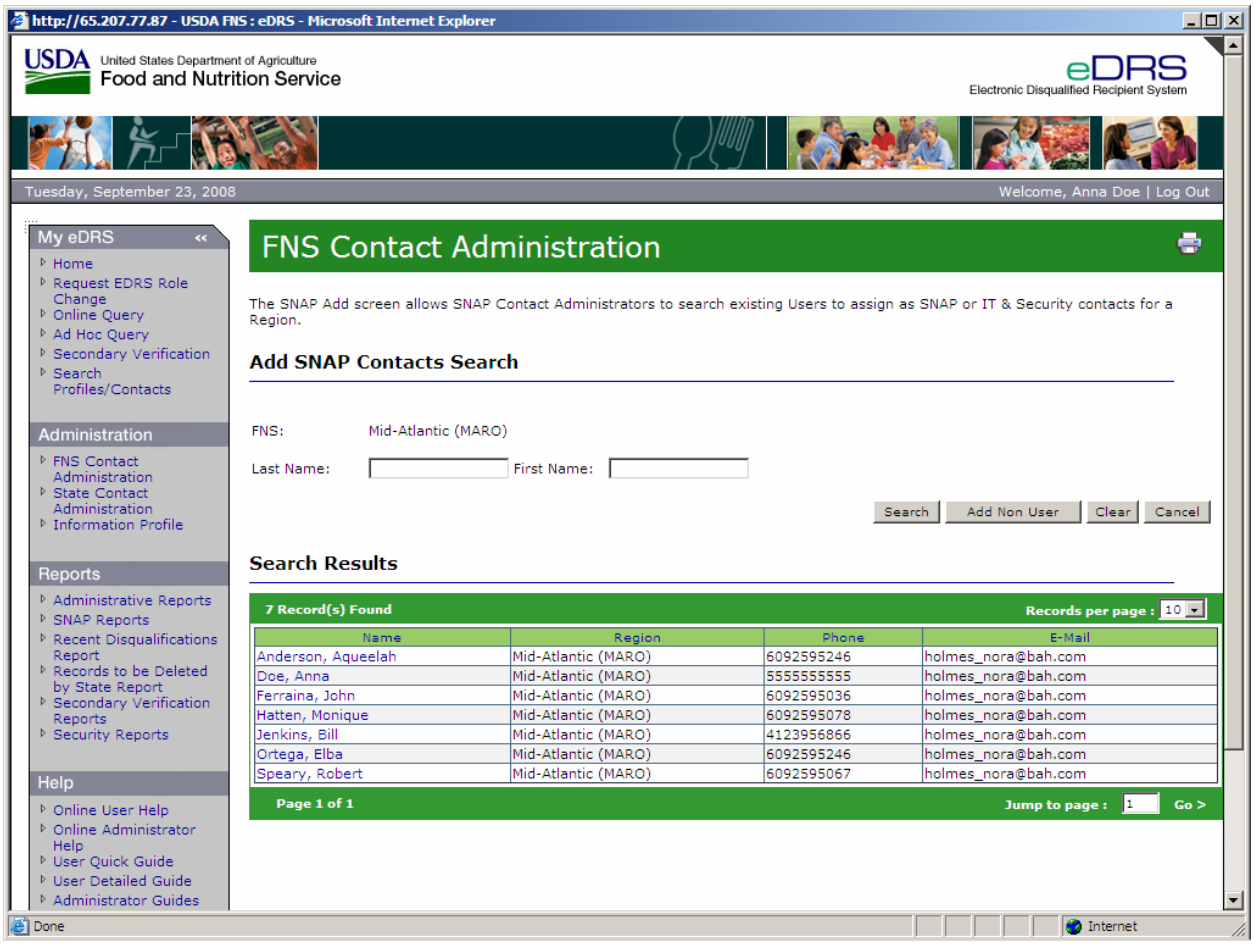
Figure 12. FNS Contact Administration Screen



2. Click the **Add New Contact** button on the FNS Contact Administration Screen. The Add FNS Contacts Search Screen will appear as shown in Figure 13.

Note: The FNS Contact Administration Screen Defaults search results to FNS Contacts for your region.

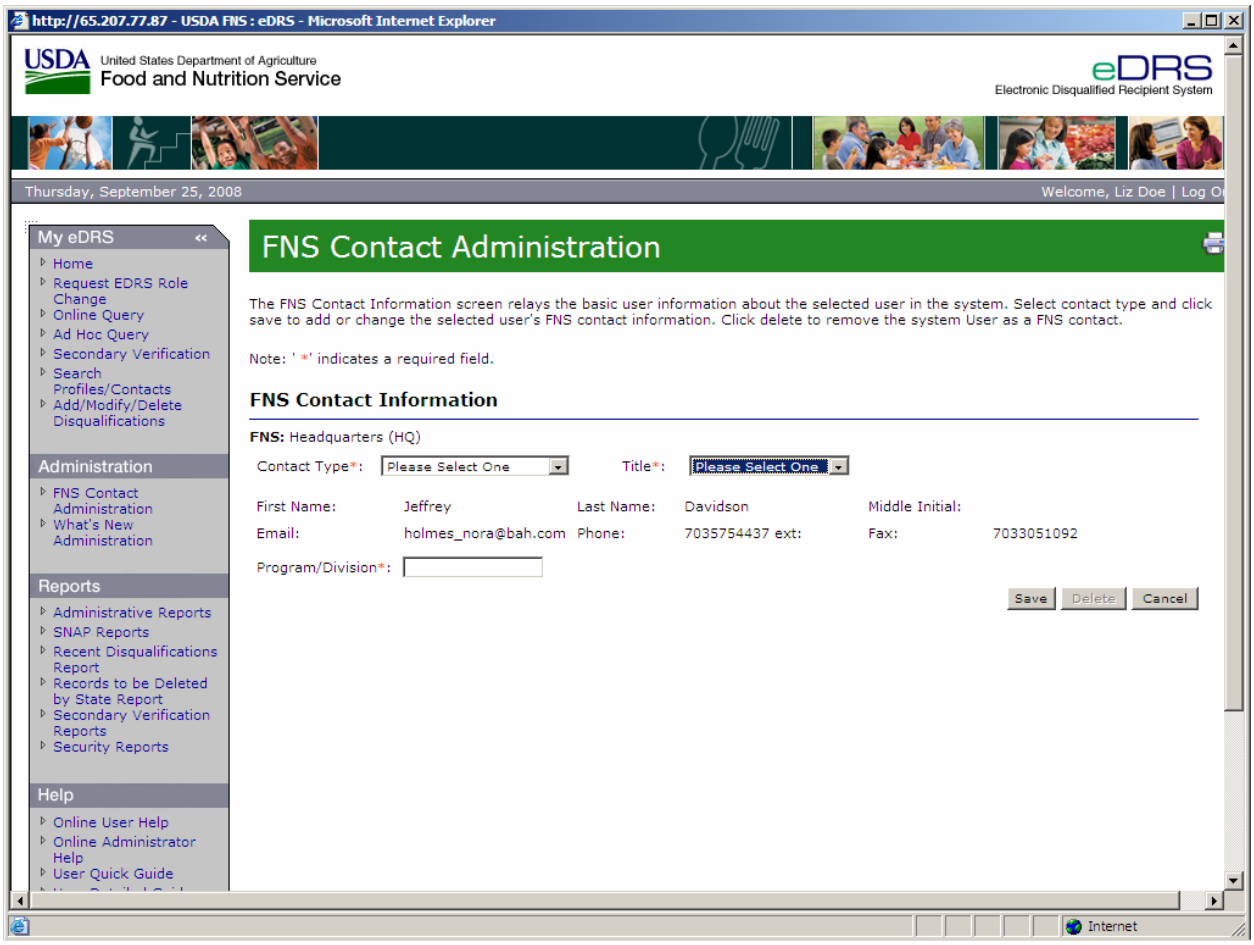
Figure 13. Add FNS Contacts Search Screen



Note: The Search results will default to all users from the region associated with your user account.

3. Click on a name displayed in the search results to add the user as a FNS Contact. Alternatively, type in the **Last Name** and **First Name** and click **Search** to find a user and then click on the name. The FNS Contact Information Screen will be displayed as shown in Figure 14.

Figure 14. FNS Contact Information Screen



4. Select the **Contact Type (SNAP or IT and Security)** from the drop down list.
5. Select the **Title** from the drop down list. The title options change depending upon the contact type you select. For example, if you select SNAP Contact Type, National Coordinator and Other will appear in the Title field. If you select IT and Security in the Contact Type, FNS Security Officer and Other will appear. If you select **Other** in the Title field, enter the Title into the field at the right.
6. Enter **Program/Division** name into the Program/Division Field.
7. All other fields are populated based on the user's account information and cannot be modified here.
8. Click **Save** to add the user as an FNS contact or click **Cancel** to return to the previous screen.

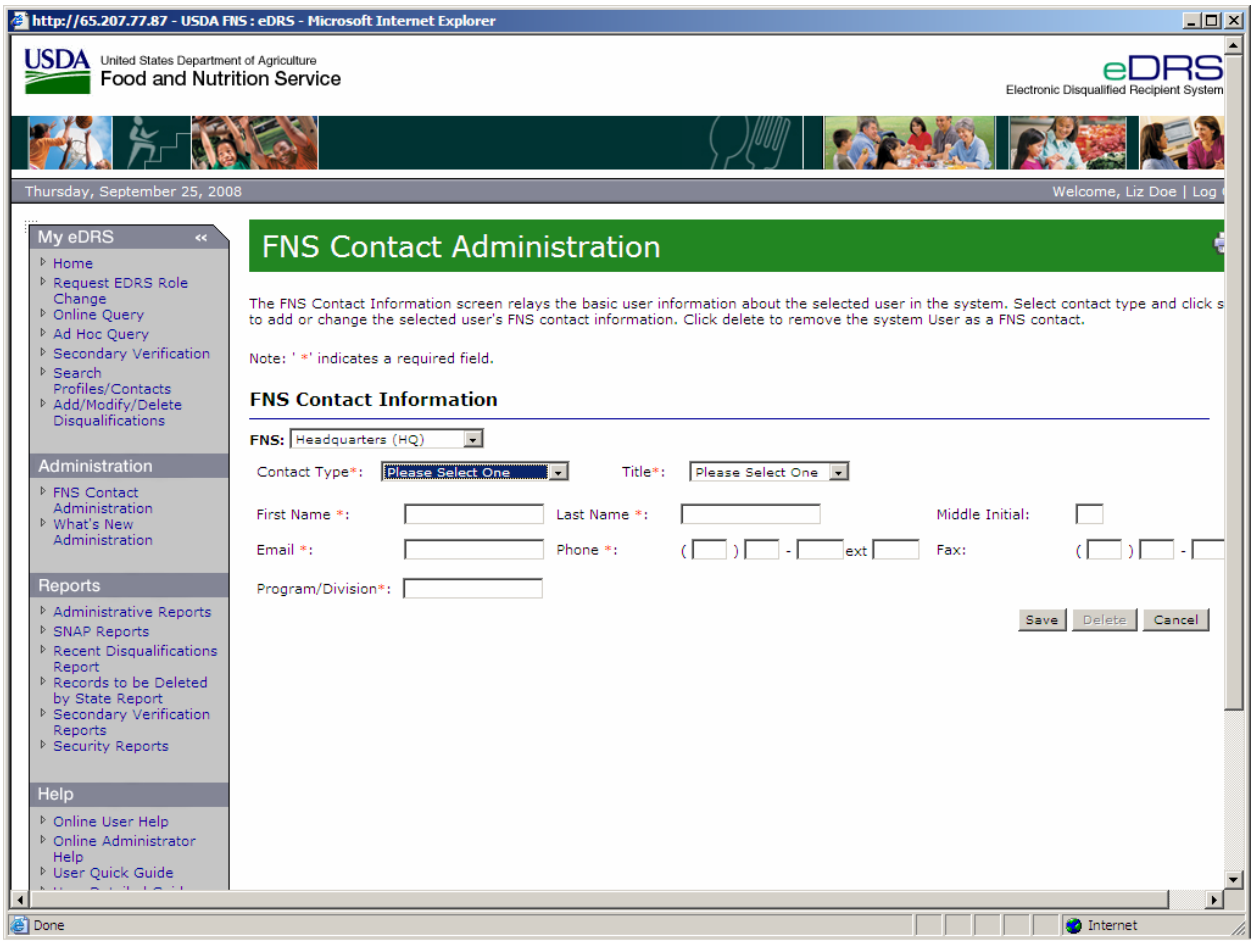
*Note: All * fields are required fields.*

9. If you click Save, you will be returned to the FNS Contact Administration screen where you will be able to view the contact you entered.

To add a FNS Contact that is not a user of the system:

1. Follow steps 1 and 2 from above, the Add FNS Contact Search screen will appear.
2. Click on the **Add Non User** button and the FNS Contact Information Screen will appear as shown in Figure 15.

Figure 15. FNS Contact Information Screen



3. Select the **Contact Type** (**SNAP** or **IT and Security**) from the drop down list.
4. Select the **Title** from the drop down list. The title options change depending upon the contact type you select. For example, if you select SNAP contact type, National Coordinator and Other will appear in the Title field. If you select IT and Security in the Contact Type, FNS Security Officer and Other will appear. If you select **Other** in the Title field, enter the Title into the field at the right.
5. Enter the first name in the **First Name** field.
6. Enter the last name in the **Last Name** field.
7. Enter the middle initial in the **Middle Initial** field (Optional).
8. Enter the e-mail in the **E-Mail** field.
9. Enter the phone number in the **Phone** field.
10. Enter the fax number in the **Fax** field (Optional).
11. Enter the organization in the **Agency** field.

12. Enter **Program/Division** name into the Program/Division field.
13. Click **Save** to add the user as an FNS contact or click **Cancel** to return to the previous screen.

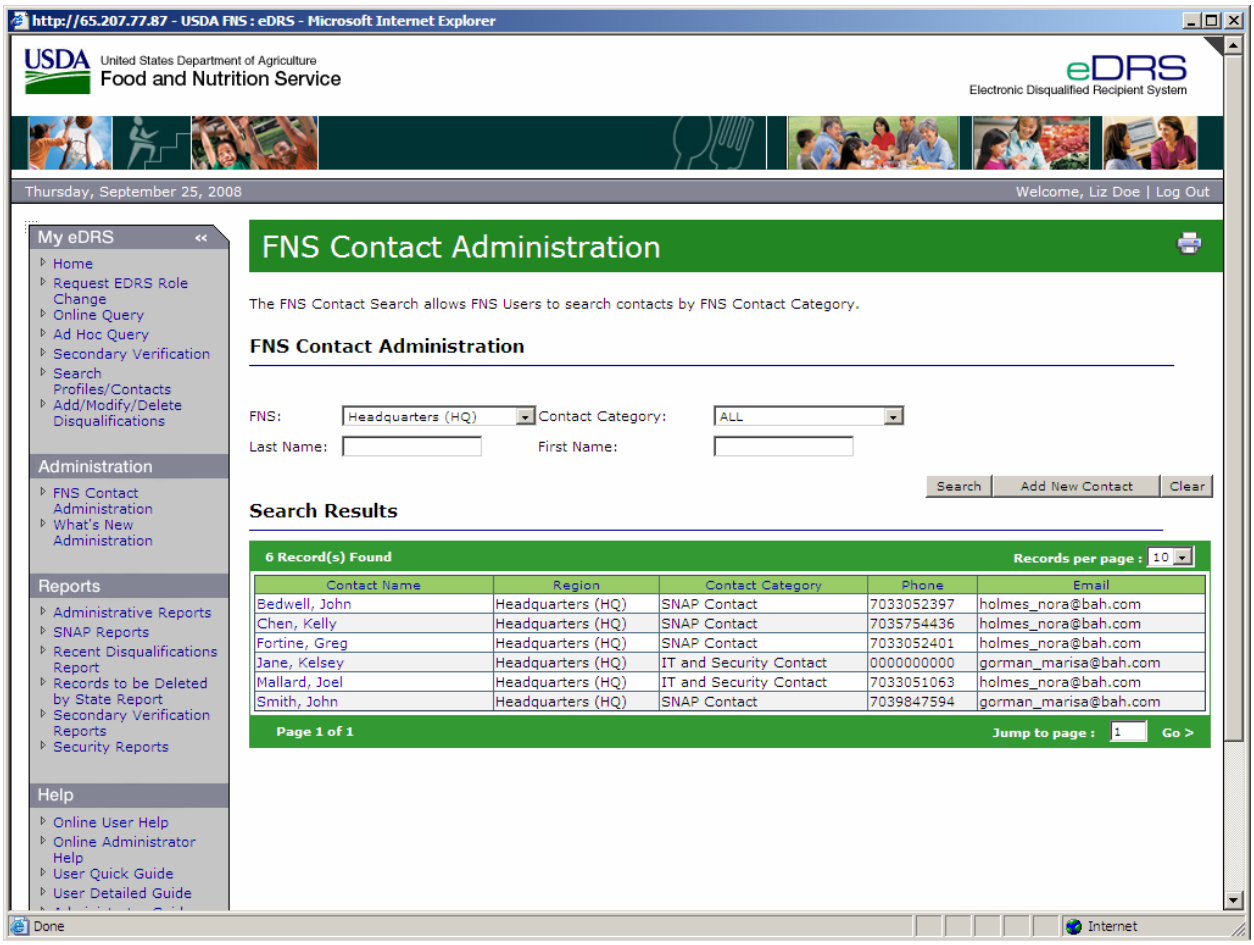
*Note: All * fields are required fields.*

14. If you click Save, you will be returned to the FNS Contact Administration screen where you will be able to view the contact you entered.

To Modify or Delete a FNS Contact:

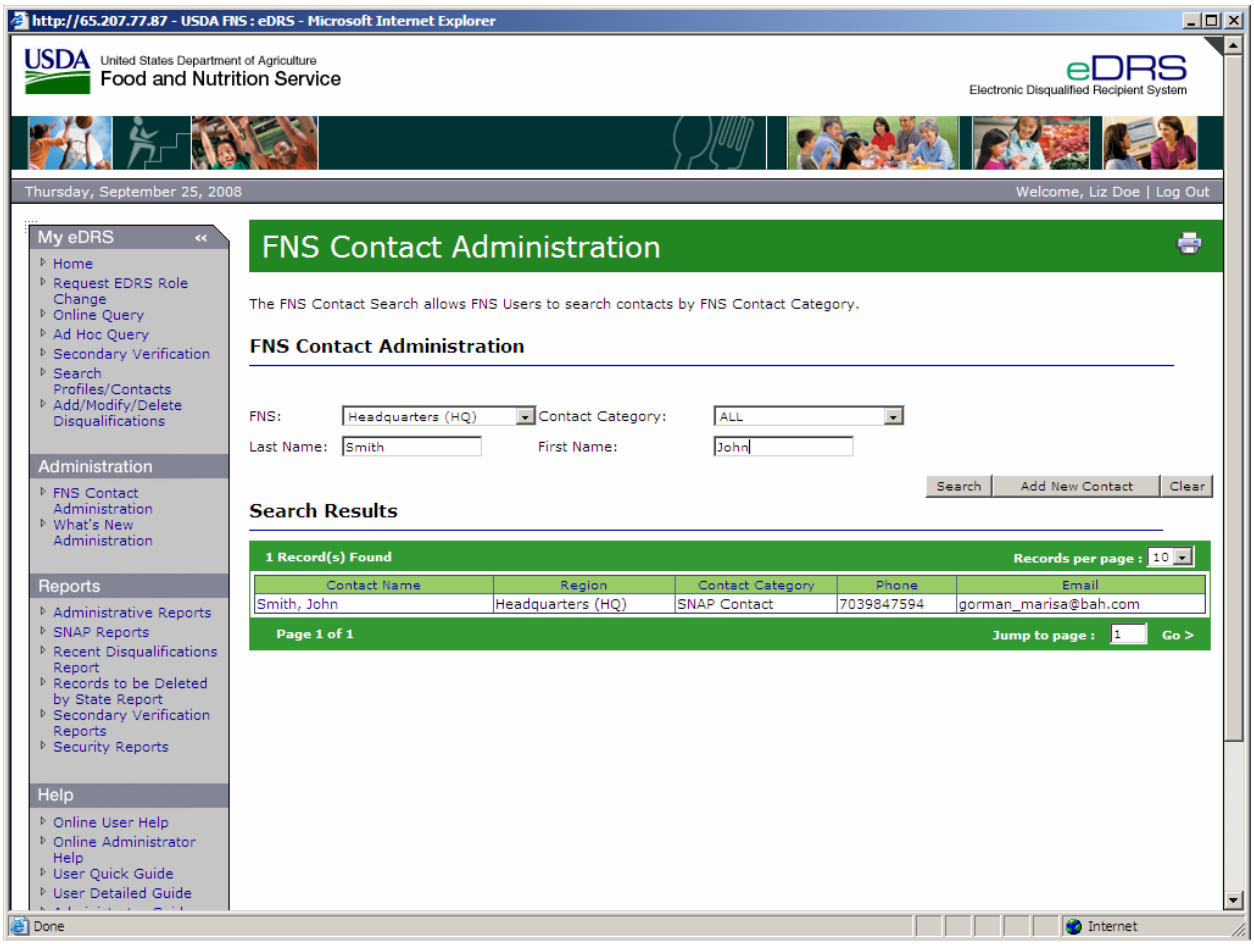
1. Click **FNS Contact Administration** under Administration on the left menu bar, as shown in Figure 16. The State Contact Administration page defaults to the state or region to which your user profile is related. In the Search Results section of the page, contacts that have been assigned will appear; if none have been assigned, this section will be blank.

Figure 16. FNS Contact Administration Screen



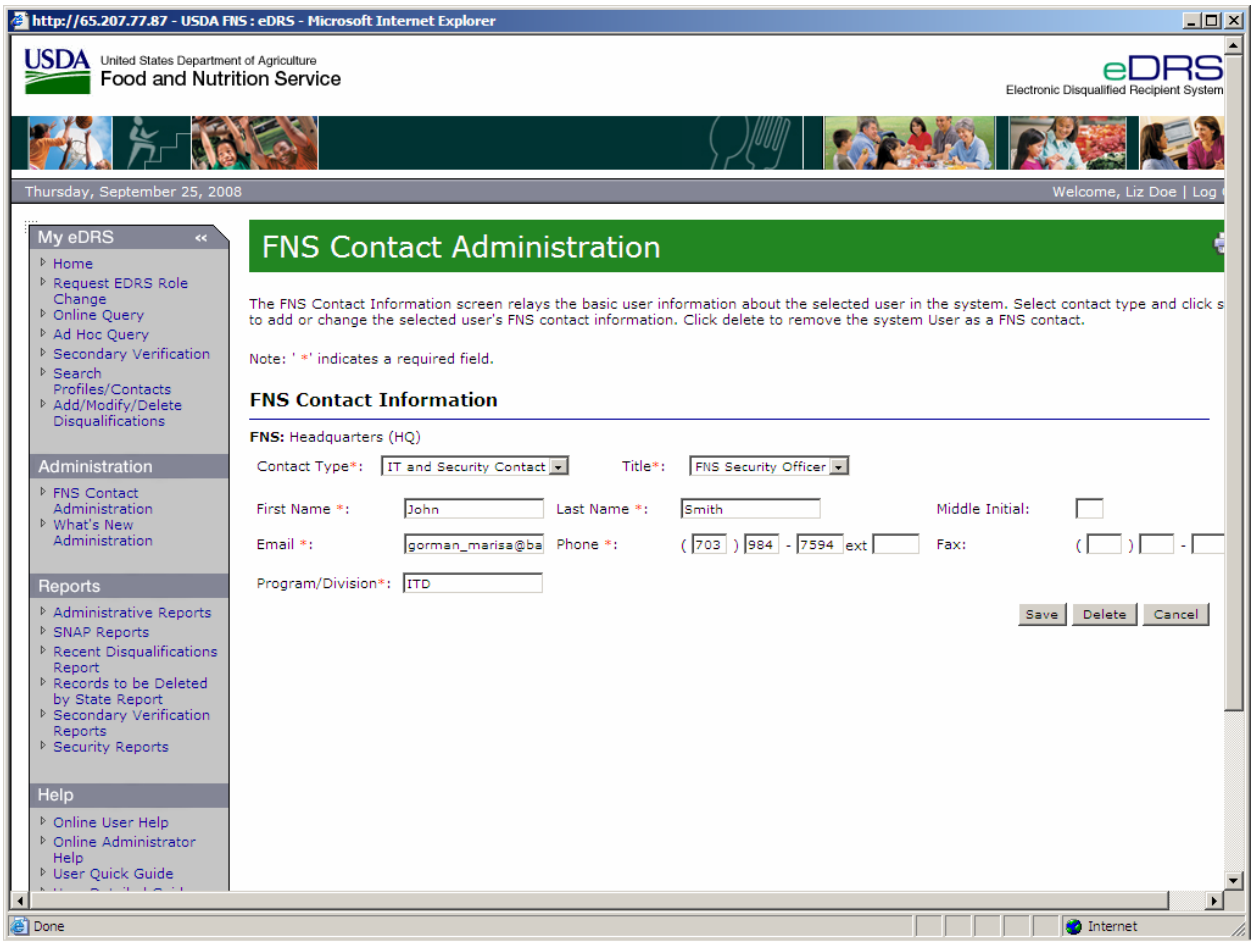
2. To find a contact that you want to modify or delete, find them in the search results section, or to search for a contact within your specific region, select the **Contact Category**.
3. Enter the First Name and/or Last Name.
4. Click **Search** to find the contact as shown in Figure 17.

Figure 17. FNS Contact Administration, Search Results Screen



5. Click on the name of the contact to view the Contact Information as shown in Figure 18.

Figure 18. FNS Contact Information, Modify or Delete Screen



6. To modify the contact information make the changes to the fields and click **Save**. For users of the system only Contact Type, Title, and Program Division may be modified. For Contacts who are not users of the system, all fields may be modified.
7. To delete a contact click **Delete.** Deleting a contact only deletes the contact category associated with the contact name; it does not delete the contact information. If the person being deleted is not a user of the system, their contact information is removed from the system.

4.2 Performing State Contact Administration

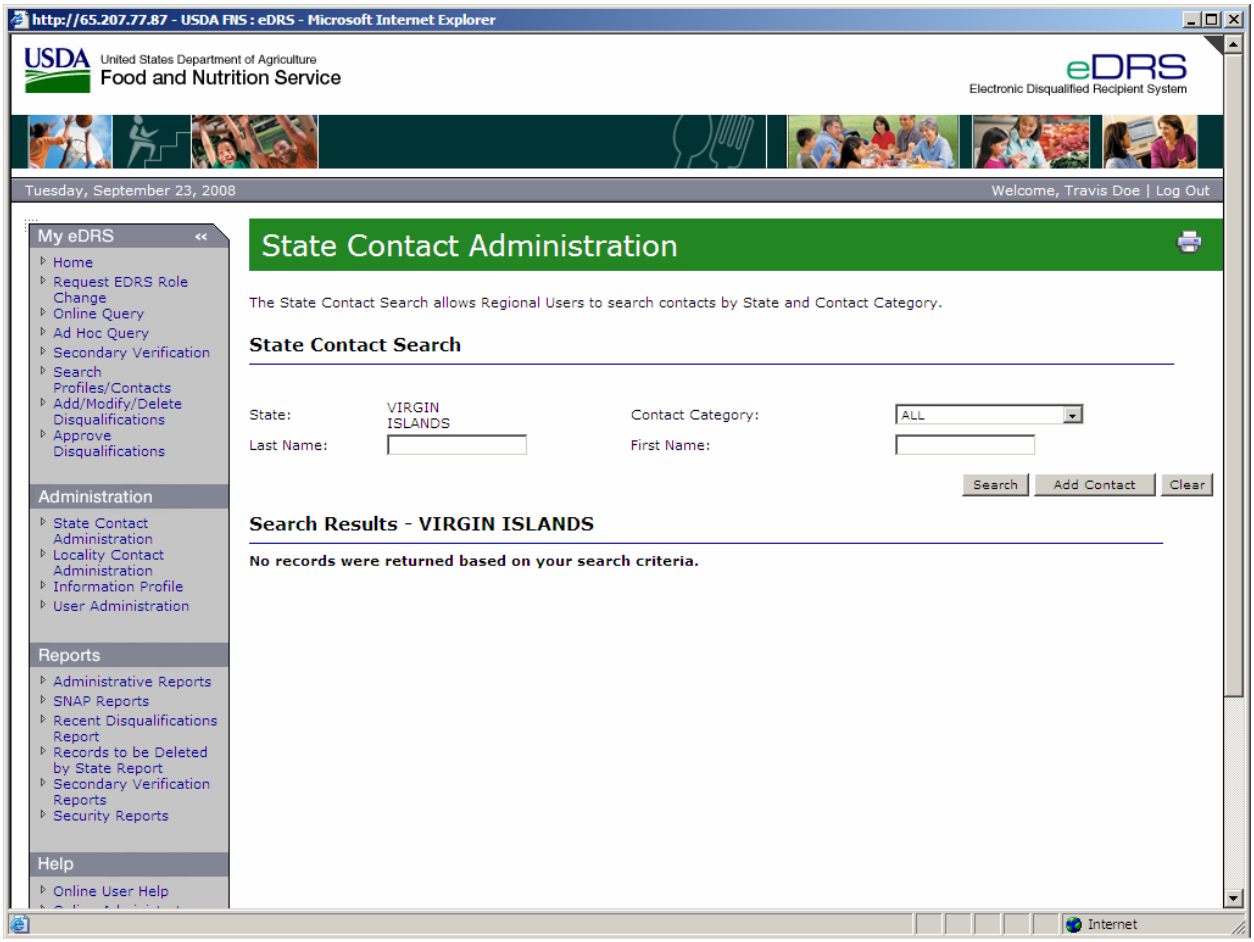
The State Contact Administration function allows the user to search, add, modify, and delete state contacts. A state contact may include a Supplemental Nutrition Assistance Program Staff who has oversight of the program ensuring compliance with FNS regulations. State contacts may also be IT or Security contacts that have responsibility over the state users or state submission data. Only users with Regional Coordinator and State Administrator roles have access to the State Contact Administration screens.

Note: State contacts may or may not be users of eDRS.

To add an existing user as a state contact:

1. Select **State Contact Administration** on the left menu bar to view the State Contact Search screen as shown in Figure 19. The State Contact Administration page defaults to the state to which your user profile is related.

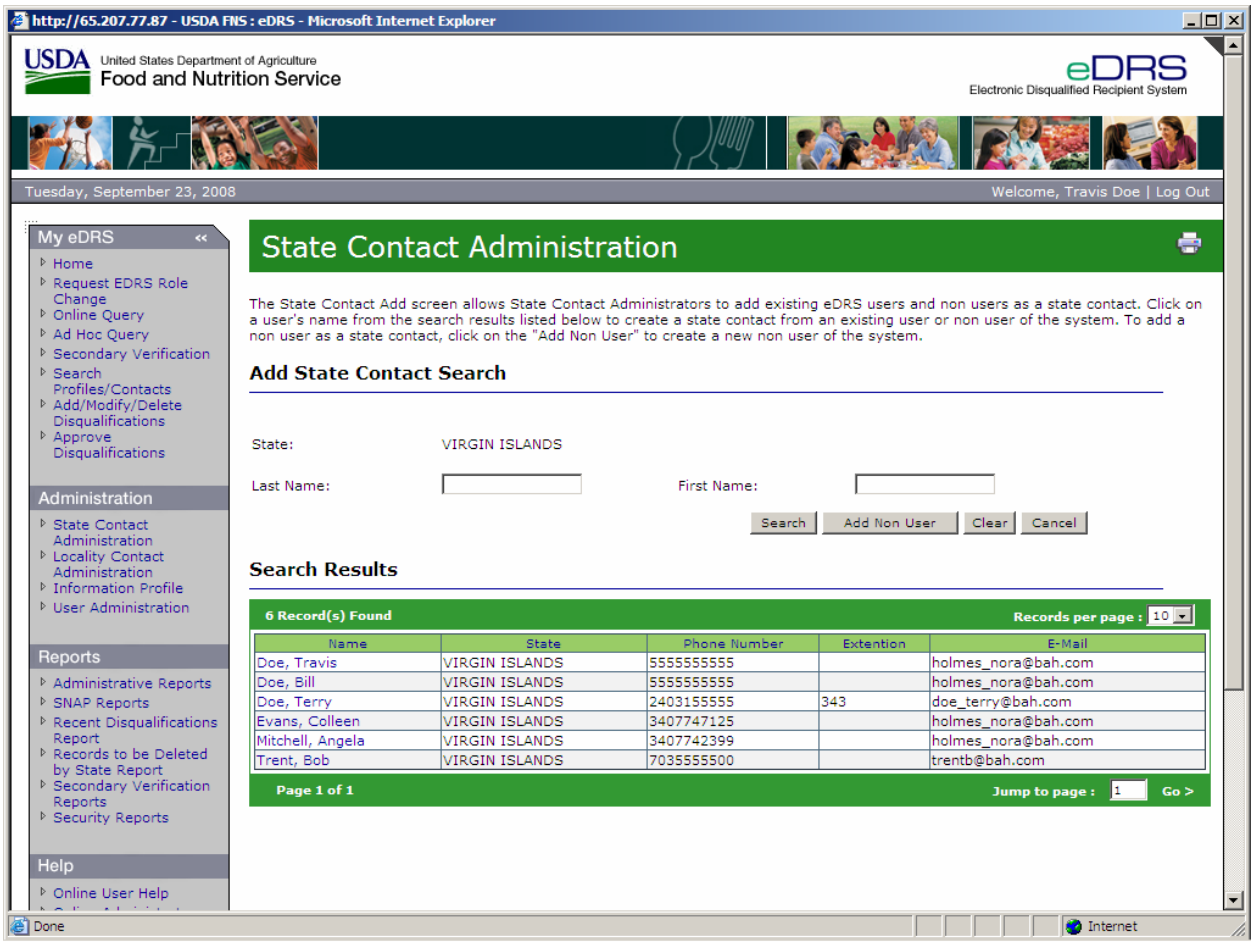
Figure 19. State Contact Search Screen



2. Click **Add Contact** button on the State Contact Administration Screen - the Add State Contact Search Screen will display as shown in Figure 20.

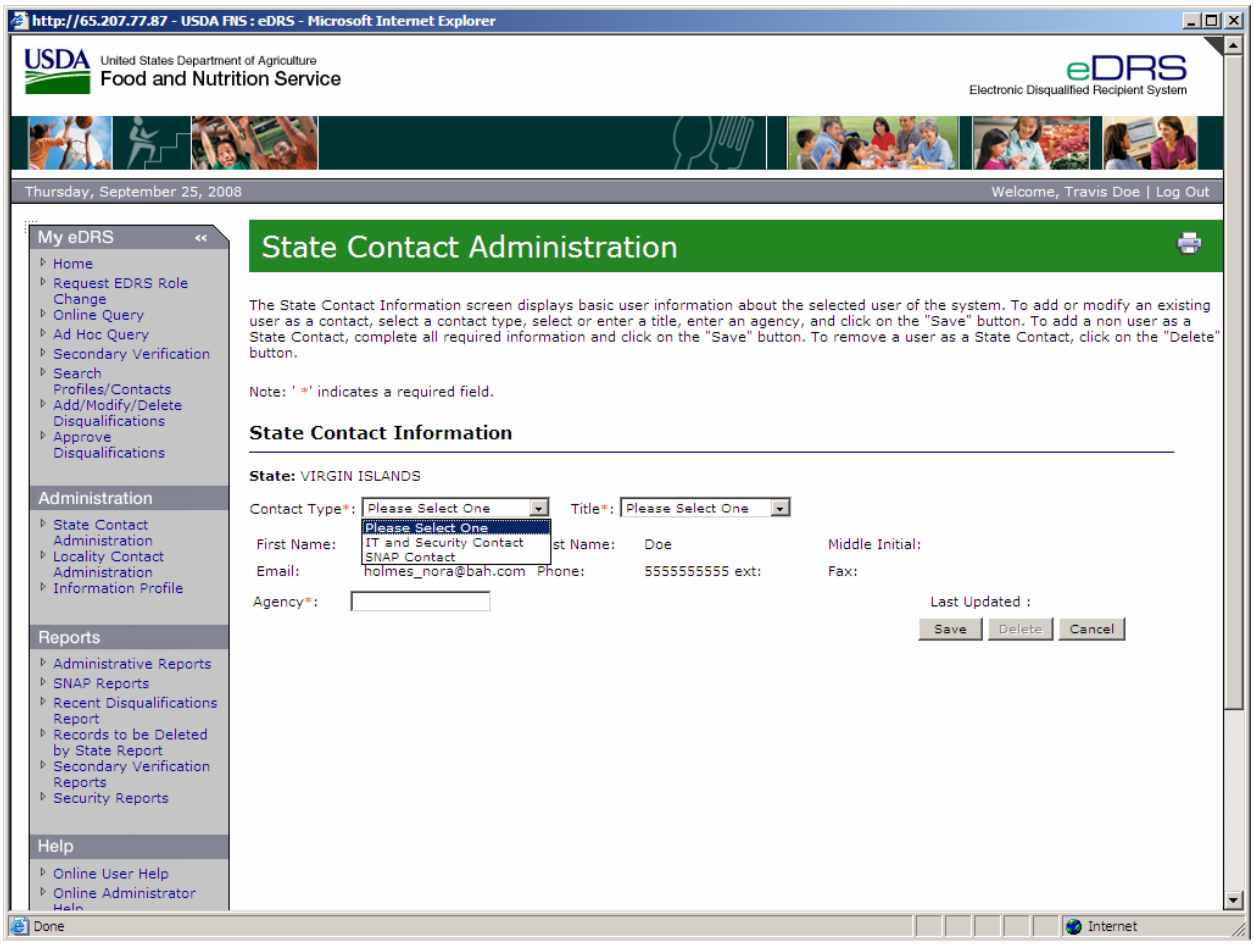
Note: For state users, the search results default to all users from the state associated with your user account. For Regional users, the search results default to all users from the first state within your region.

Figure 20. Add State Contact Search Screen



3. Search for a name by entering the user's name and clicking Search, or click on a name in the default search results to add as a State Contact. The State Contact Information Screen will display as shown in Figure 21.

Figure 21. State Contact Information Screen



4. Select the **Contact Type** from the drop down list.
5. If the SNAP contact type was selected, enter the **Title** into the Title field. If IT and Security Contact Type was selected, select the **Title** from drop down list. If you select Other, enter the **Title** into the field at the right.
6. Enter the **Agency** name into the agency field.
7. All other fields are populated from the user's account and cannot be modified here.
8. Click the **Save** button to save the user as a contact.

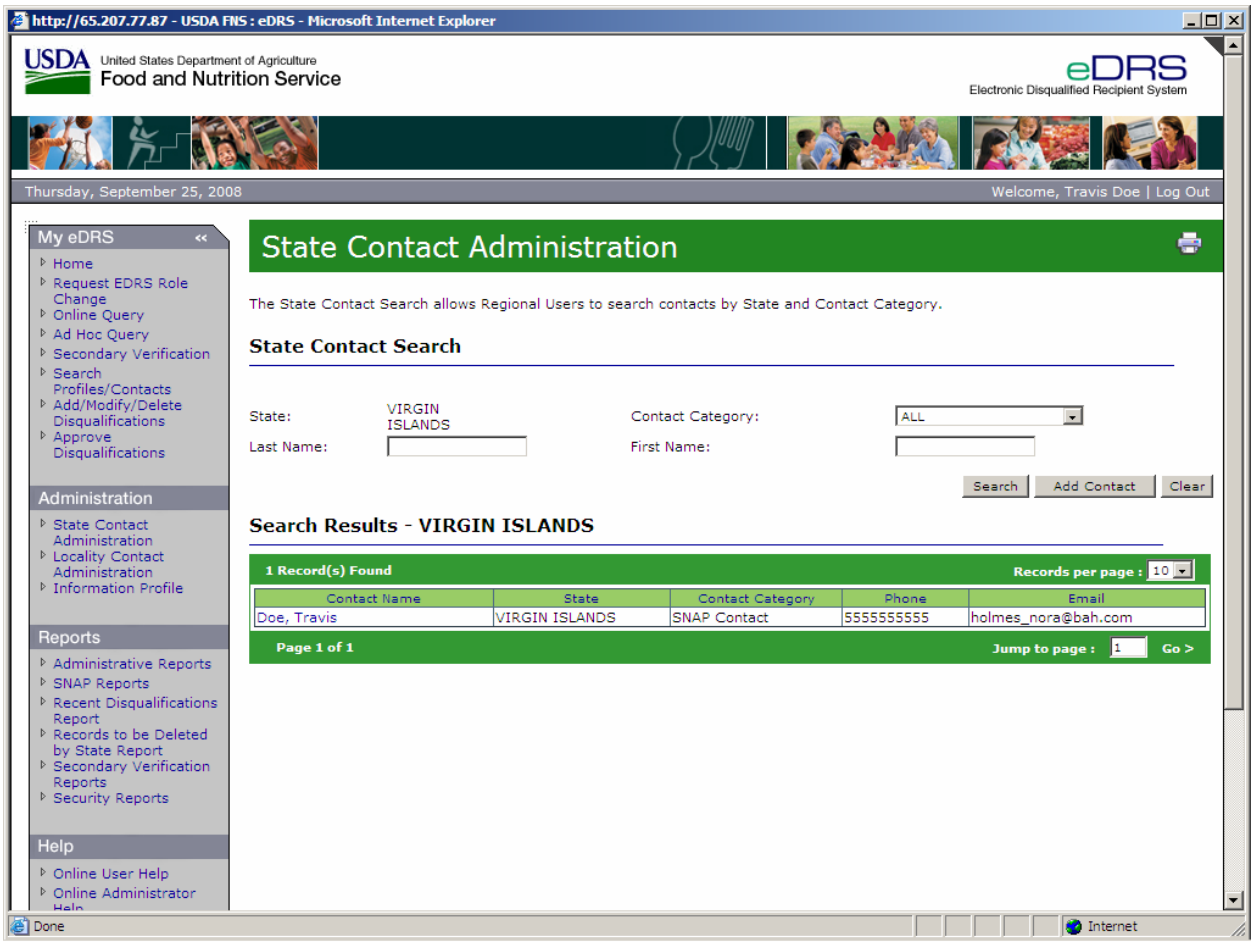
*Note: All * fields are required fields.*

9. The system will return you to the State Contact Search Screen where you will be able to see the result of your changes.

To add a new state contact to the system, that is not a user of the system:

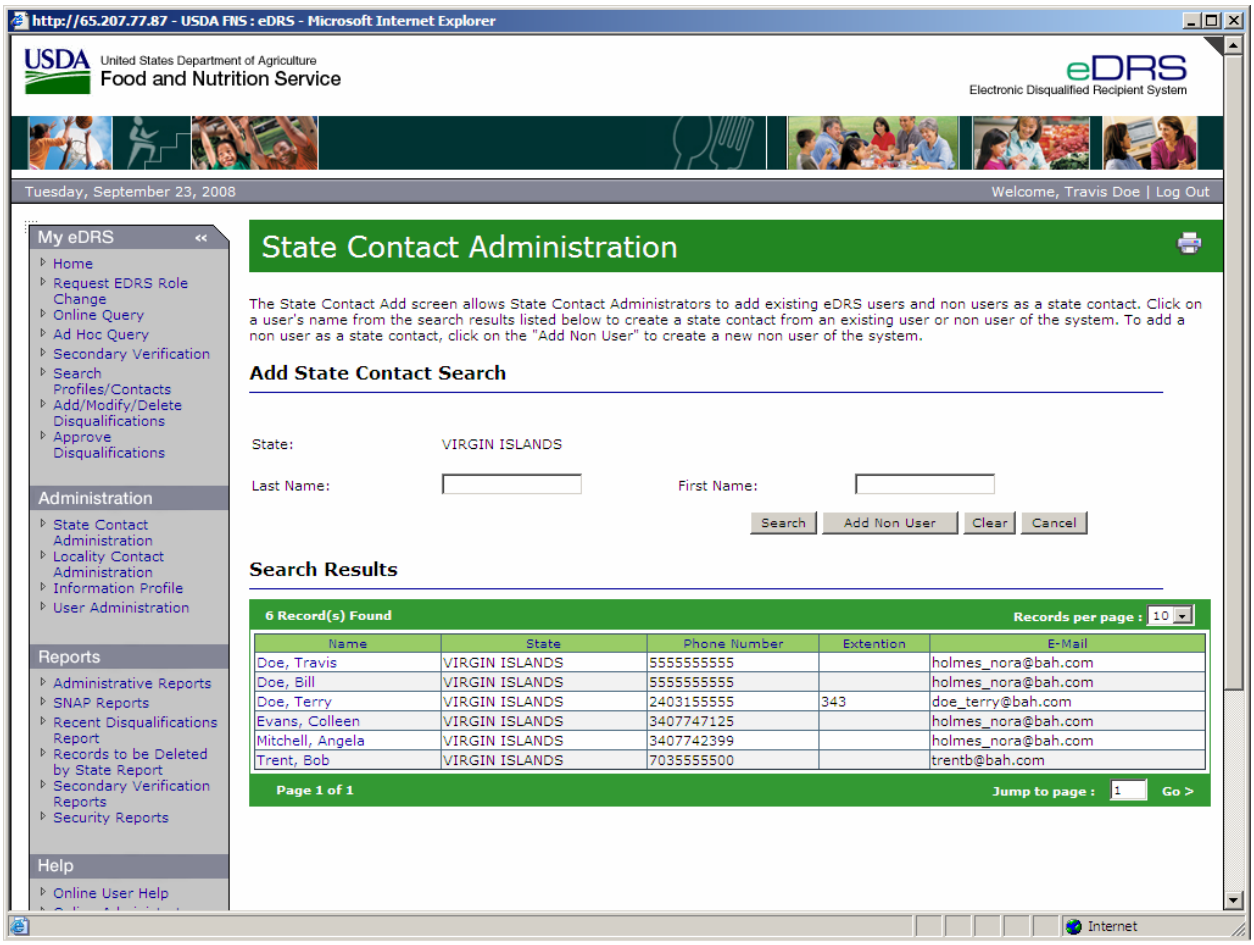
1. Select **State Contact Administration** on the left menu bar to view the State Contact Search screen as shown in Figure 22. The State Contact Search screen will default to the state to which your user profile is related.

Figure 22. State Contact Search Screen



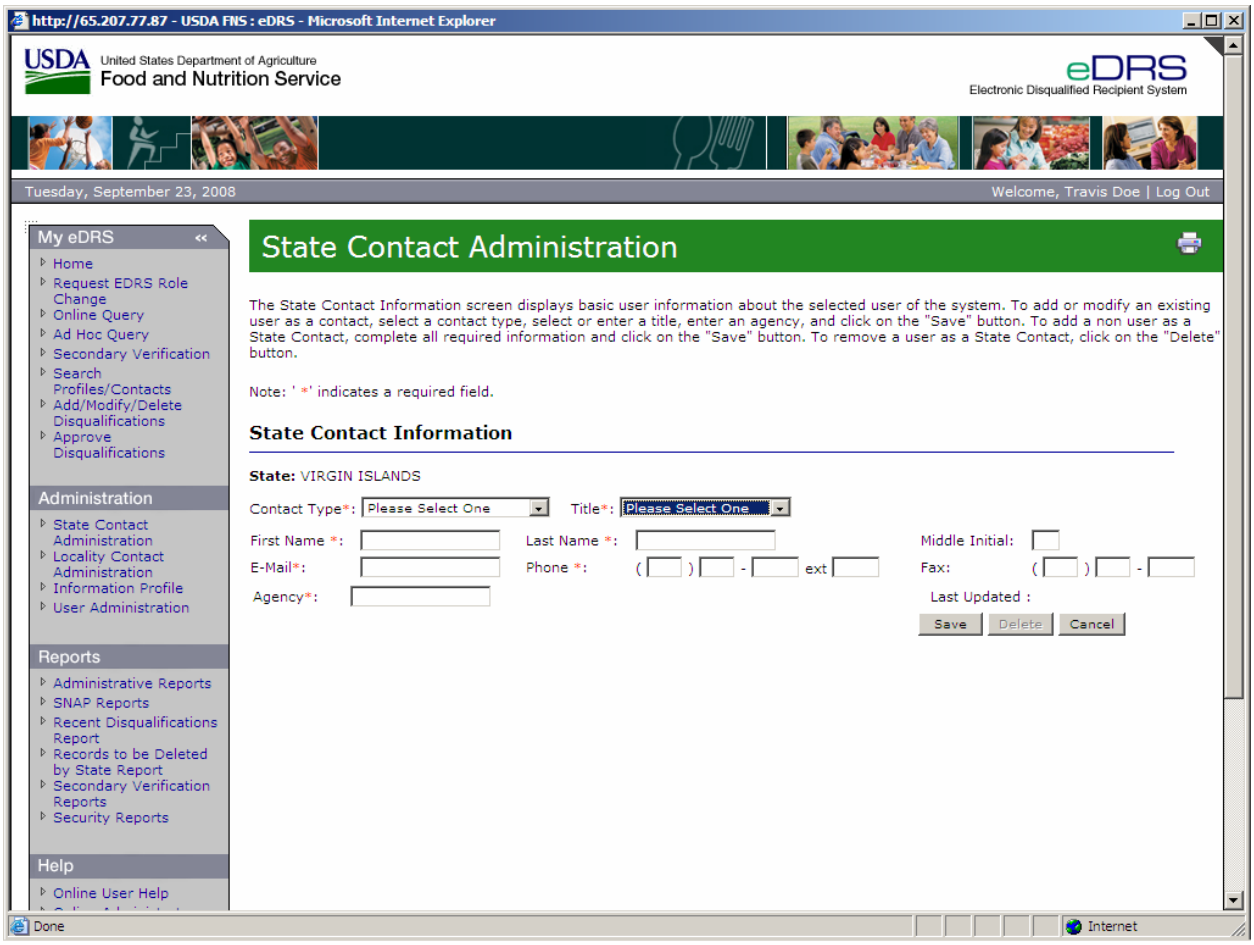
2. Click **Add Contact** button on the State Contact Administration Screen and the Add a State Contact Search screen will appear as shown in Figure 23.

Figure 23. Add State Contact Search Screen



3. Click on the **Add Non User** button and the State Contact Information screen will appear as shown in Figure 24.

Figure 24. State Contact Information, Add a Non User Screen



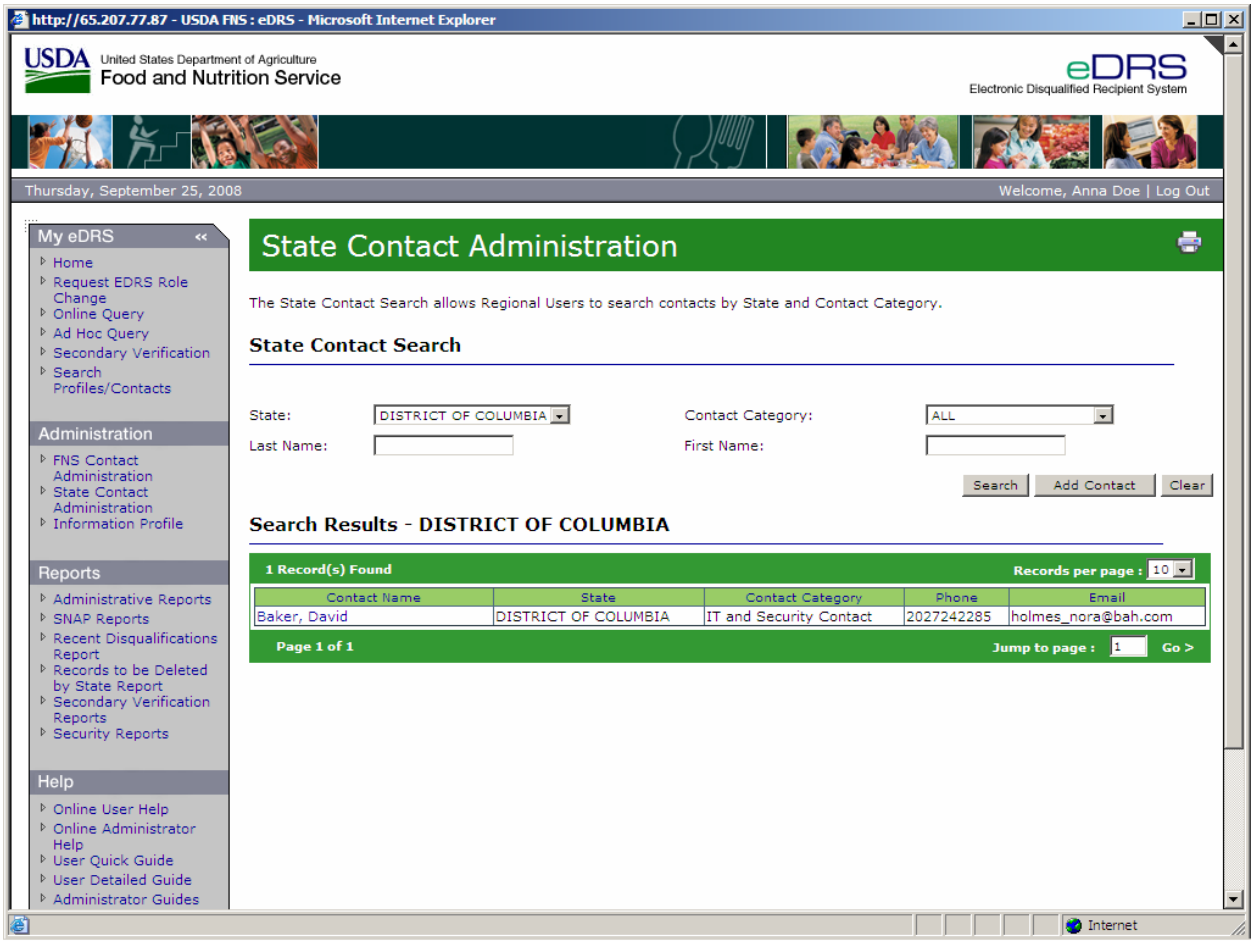
4. Select the **Contact Type** from the drop down list.
5. If the SNAP contact type was selected, enter the **Title** into the Title field. If IT and Security Contact Type was selected, select the **Title** from drop down list. If you select Other, enter the **Title** into the field at the right.
6. Enter the first name in the **First Name** field.
7. Enter the last name in the **Last Name** field.
8. Enter the middle initial in the **Middle Initial** field (Optional).
9. Enter the e-mail in the **E-Mail** field.
10. Enter the phone number in the **Phone** field.
11. Enter the fax number in the **Fax** field.
12. Enter the organization in the **Agency** field.
13. Click the **Save** button to save the contact information and return to the State Contact Administration screen to view your changes.

*Note: All * fields are required fields.*

To modify or delete a State Contact in the system:

1. Click **State Contact Administration** under Administration on the left menu bar as shown in Figure 25. The State Contact Search screen defaults to the state or region to which your user profile is related.

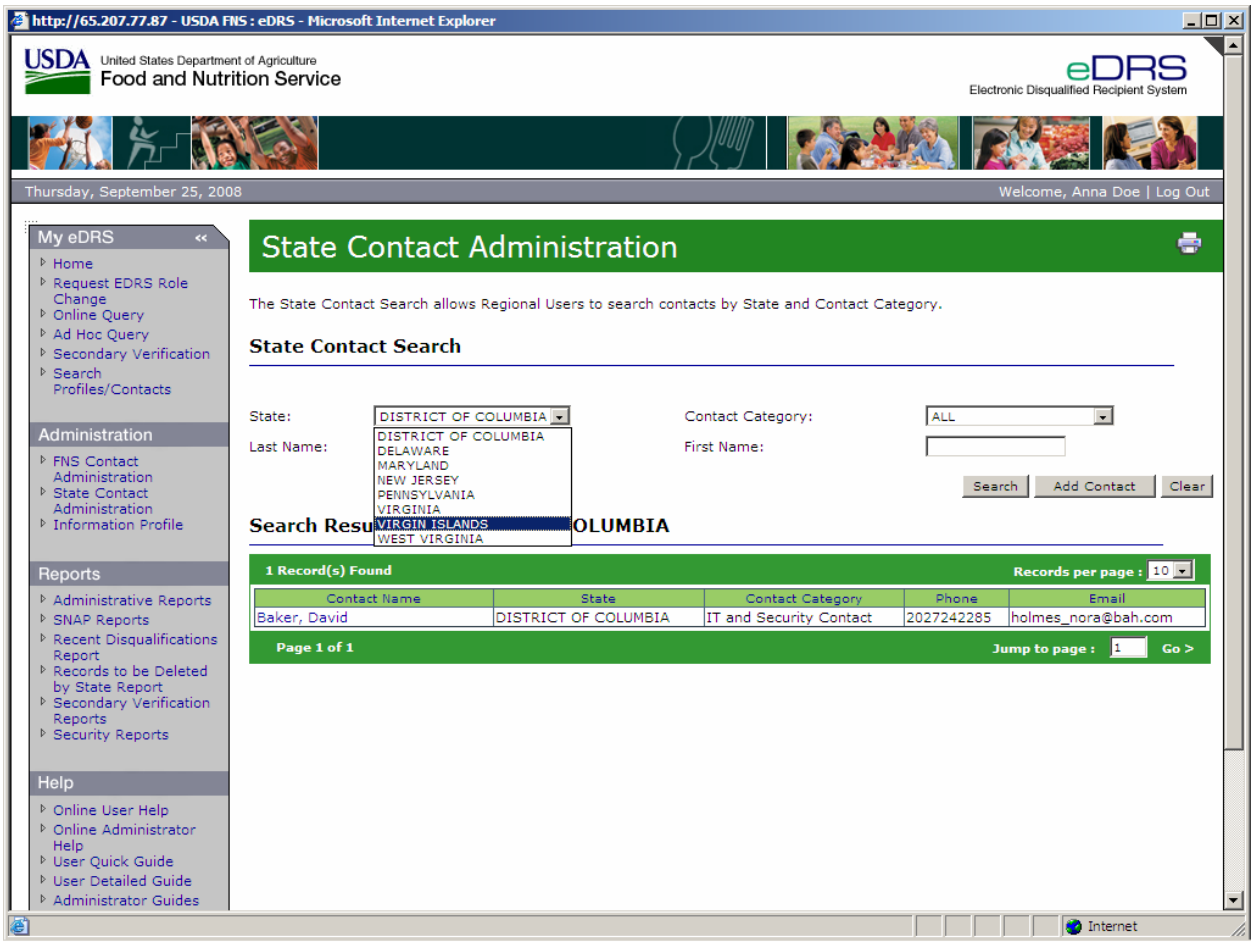
Figure 25. State Contact Search Screen



2. To search for a contact from a specific state, select the state from the drop down list in Figure 26.

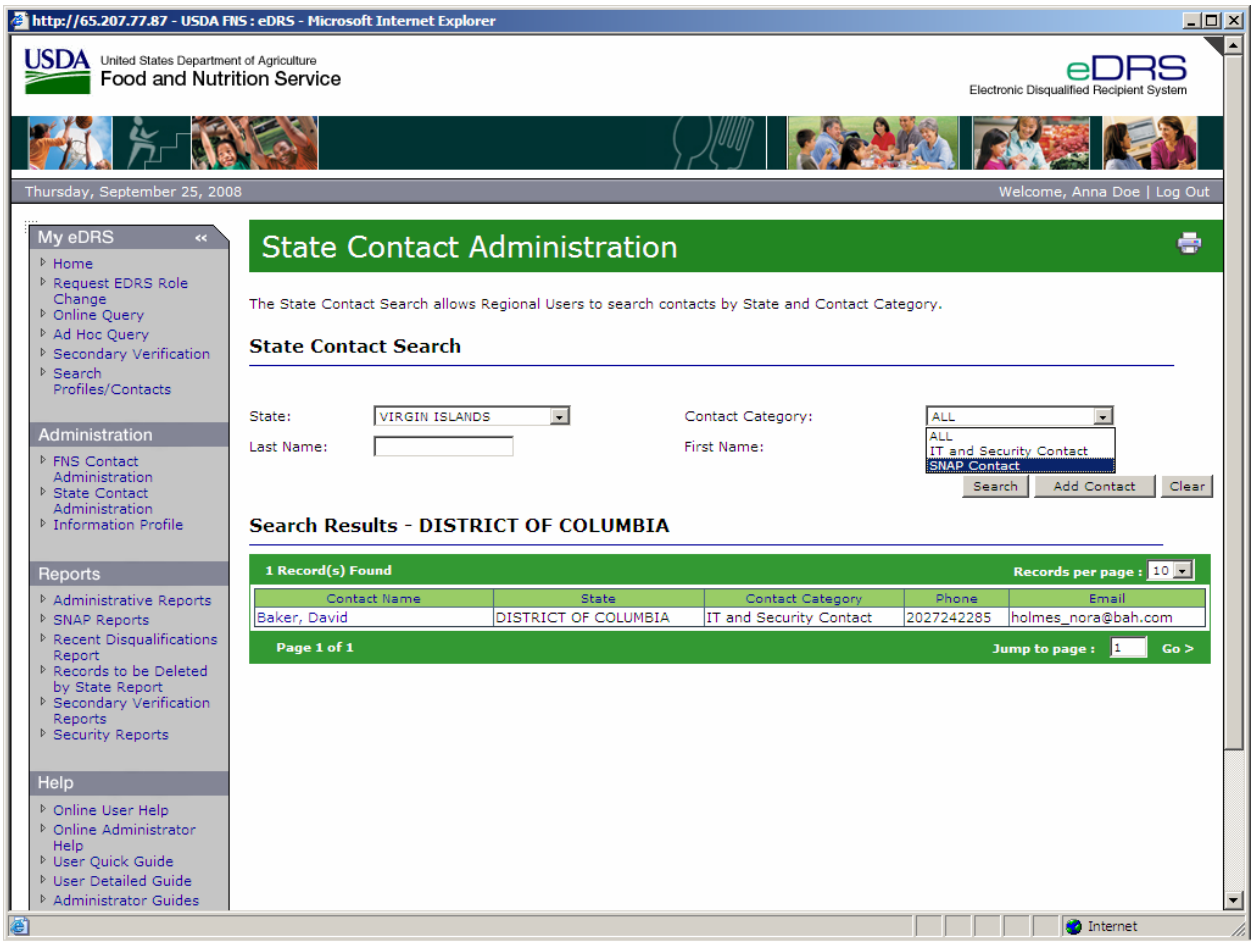
Note: The State drop down menu will default to the state to which your user name is related. Regional users can select from the all other states in their region.

Figure 26. State Contact Search, State Selection Screen



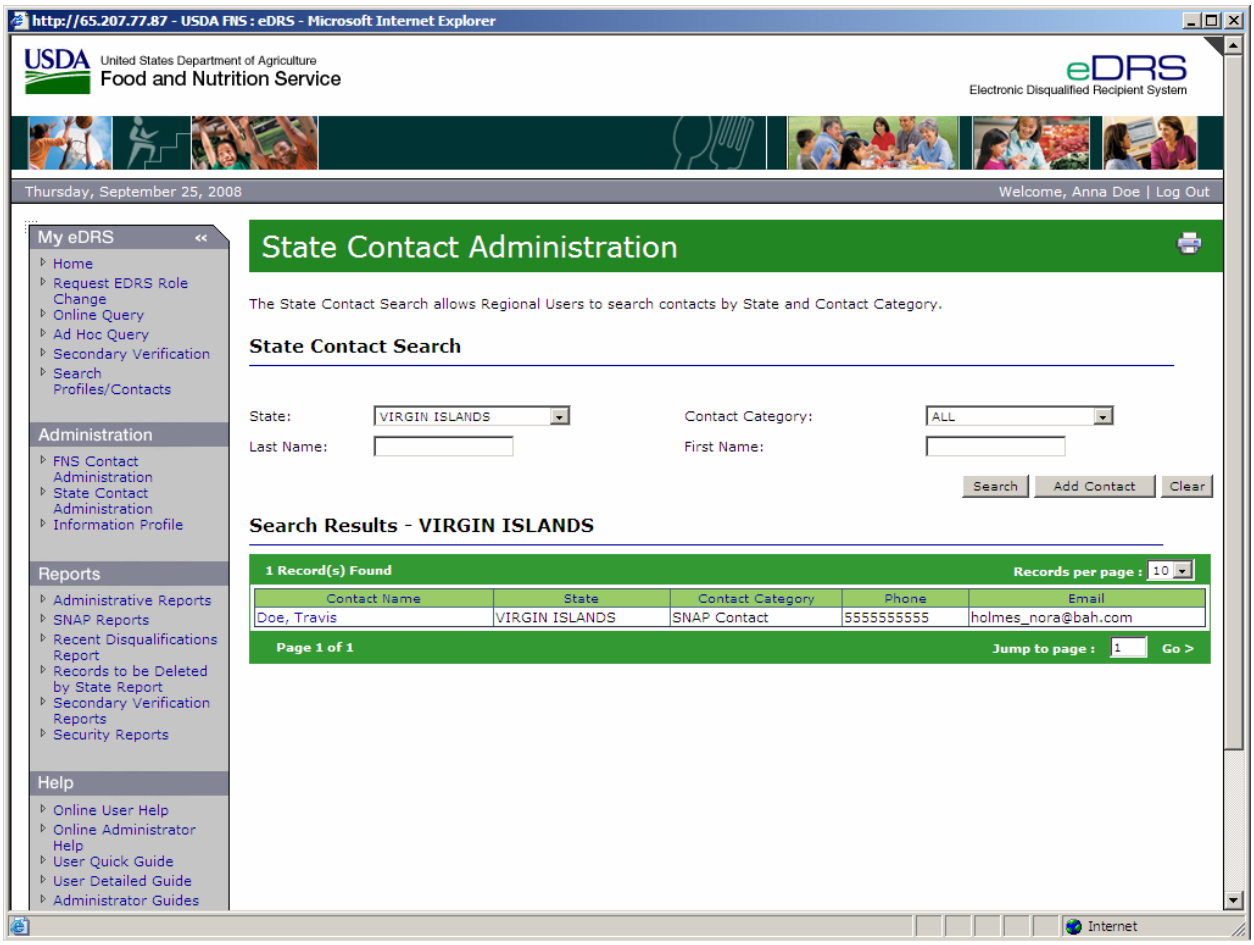
3. To narrow the search results, you can enter a last name and/or first name into the fields provided, and/or select a **Contact Category** as shown in Figure 27.

Figure 27. State Contact Search, Results Narrowed Screen



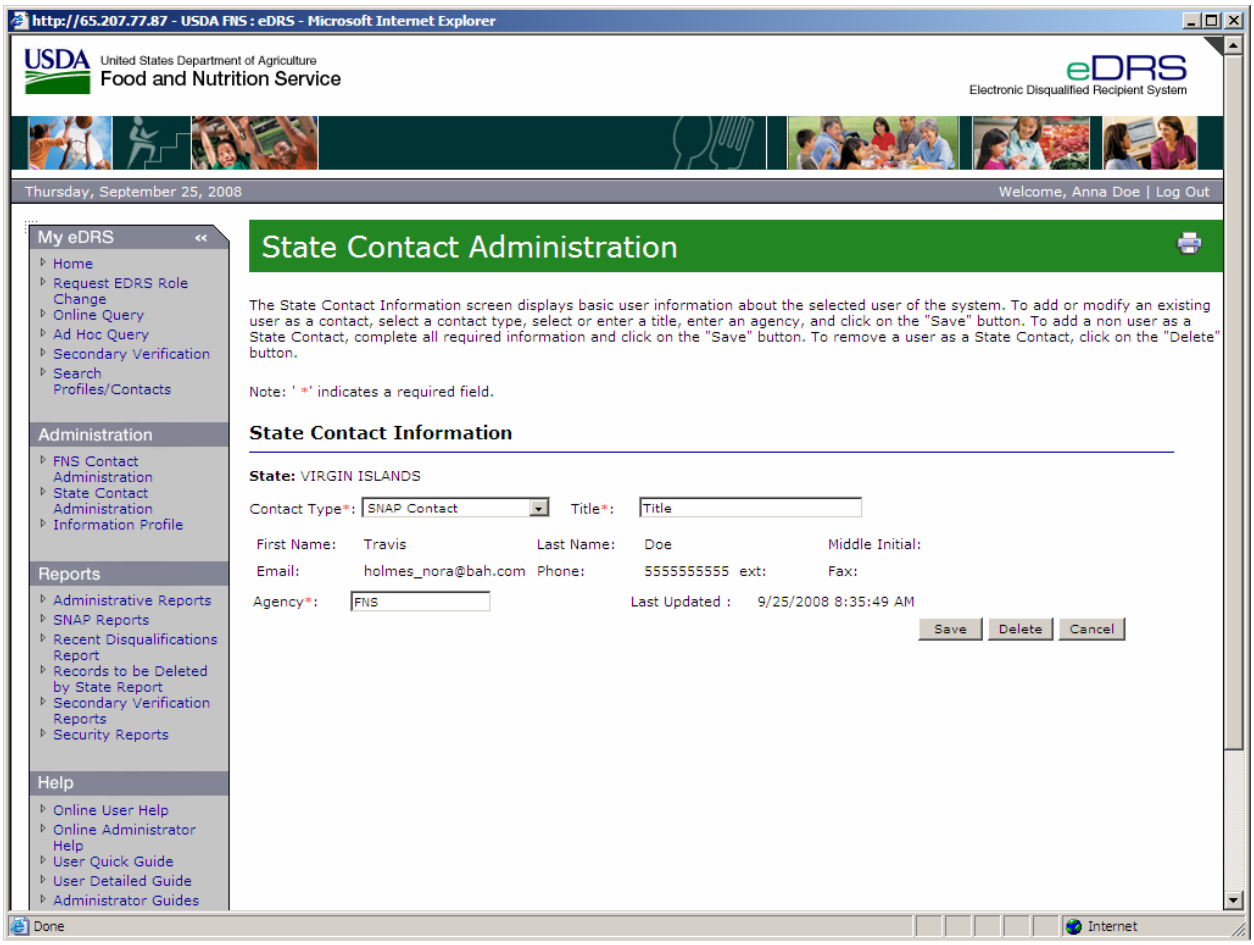
4. Click **Search** to view the results as displayed in Figure 28.

Figure 28. State Contact Search Results Screen



5. To modify or delete a contact as a **State Contact**, click on the contact name to view the State Contact Information Screen as shown in Figure 29.

Figure 29. State Contact Information Screen



6. To modify the **Contact Type** or **Title** select the change from the drop down list. To Modify the **Agency**, enter in the changes and click **Save.** For contacts that are users of the system only the Contact Type, Title, and Agency may be modified. For contacts that are not users of the system, all fields can be modified.
7. To Delete a contact, click **Delete**. Deleting a contact only deletes the contact category associated with the contact name; it does not delete the contact information. If the person being deleted is not a user of the system, their contact information is removed from the system.

4.3 Performing Locality Contact Administration

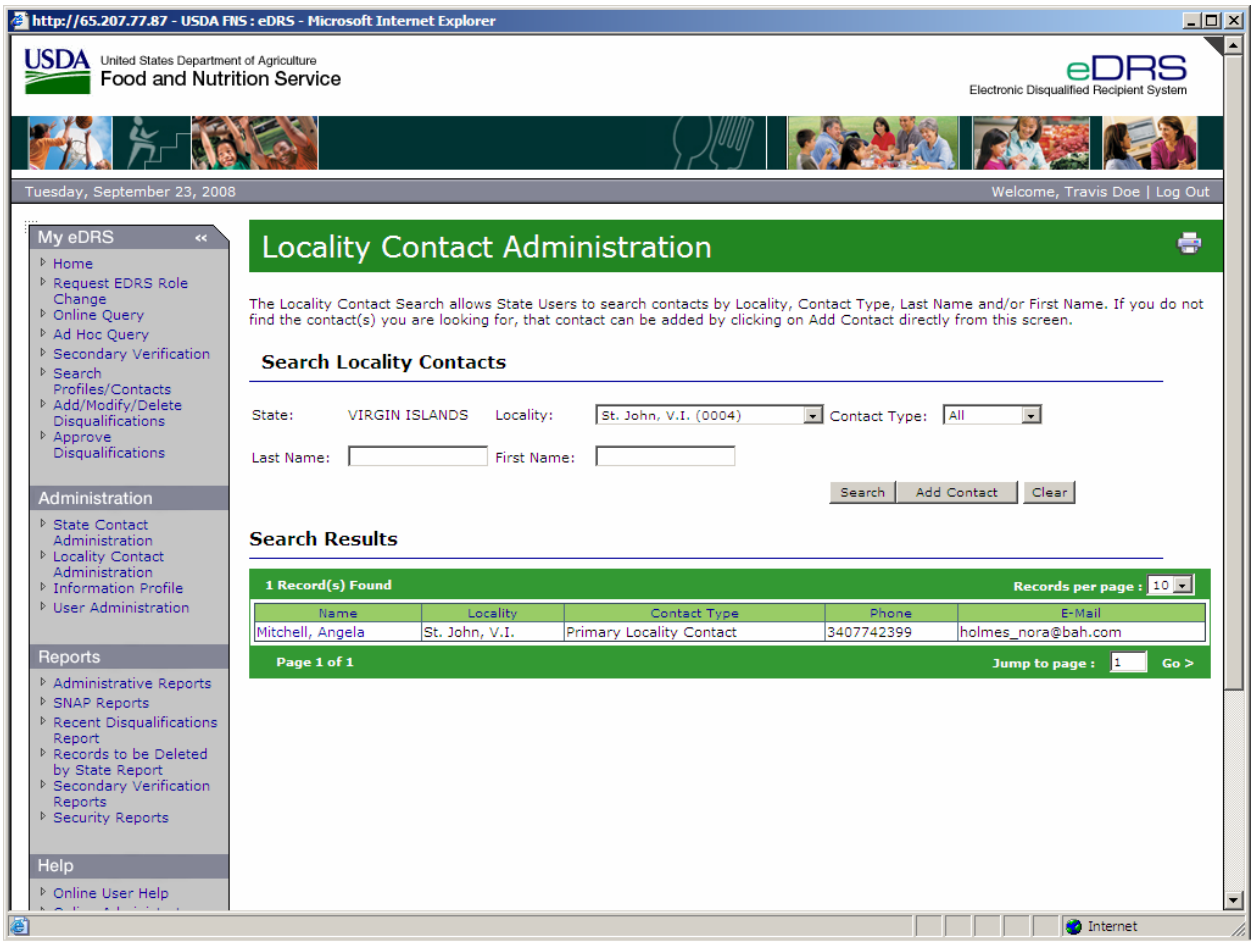
The Locality Contact Administration function allows the user to search, modify, and delete locality contacts (whether the contact is primary or secondary). Only state users have access to the Locality Contact Administration screens.

Note: Locality contacts may or may not be users of eDRS. However, Locality Contacts information for those who are not users of the system cannot be manually added to eDRS. Non-user information is provided with the states data submission and therefore cannot be modified within eDRS.

To add an existing user as a locality contact:

1. Select **Locality Contact Administration** under Administration on the left menu bar to view the Locality Contact Administration screen as shown Figure 30.

Figure 30. Locality Contact Administration Search Screen

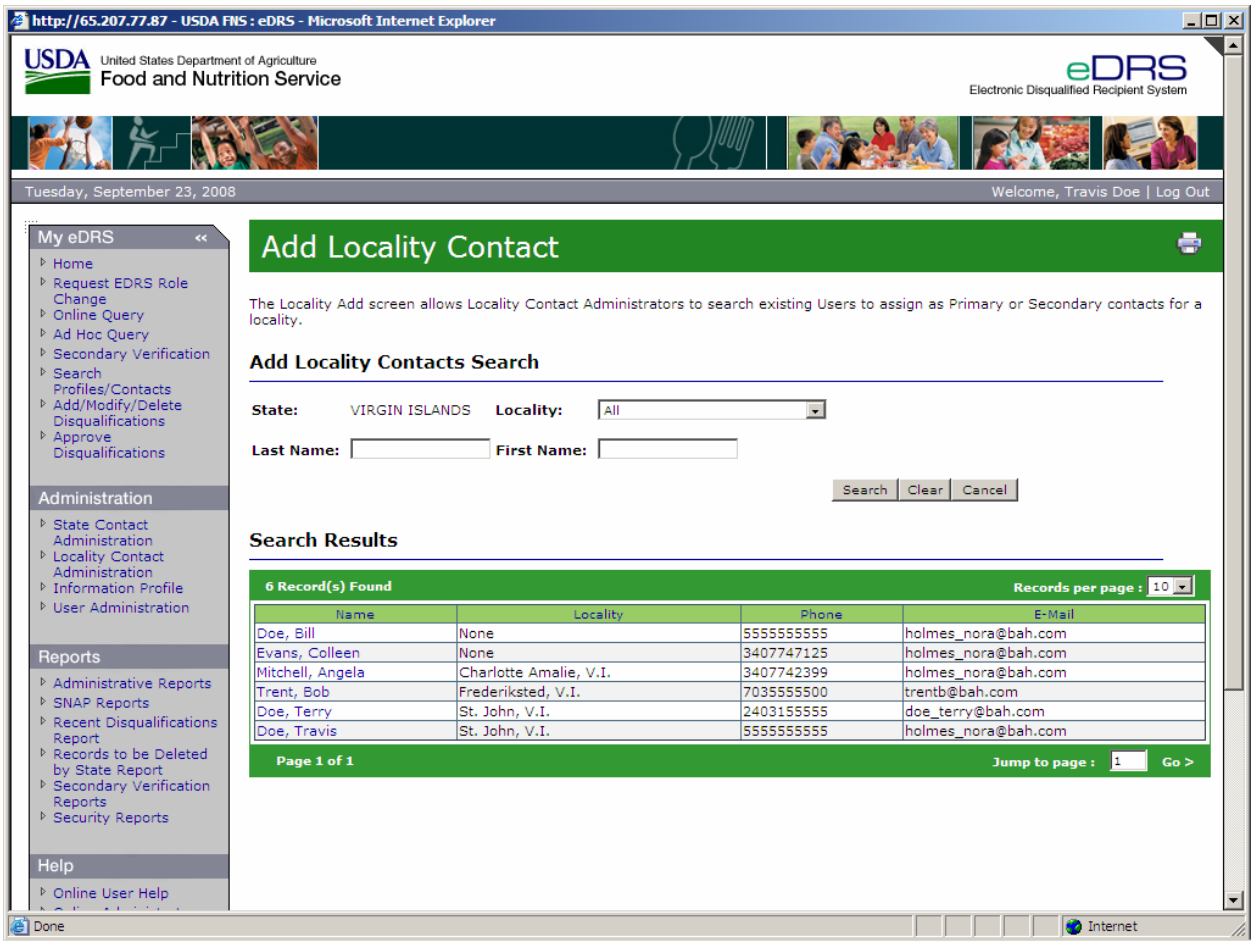


Note: As a default, the system displays the locality contacts from the state or locality associated with the user's login.

2. Click **Add Contact** button on the Locality Contact Administration Screen. The Add Locality Contacts Search Screen will appear as shown in Figure 31.

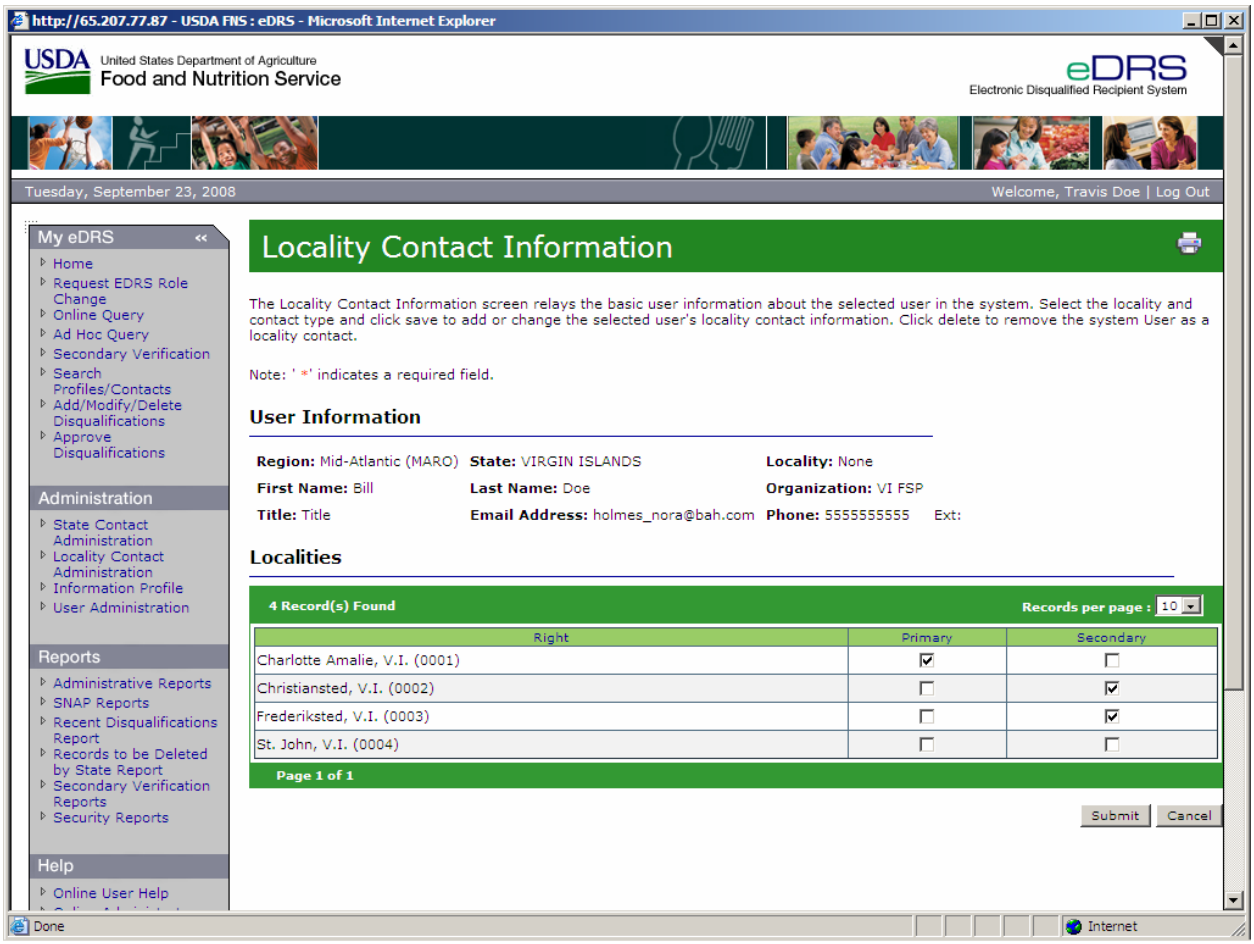
Note: *As a default, the system displays the users from the state or locality associated with the user's login.*

Figure 31. Add Locality Contacts Search Results Screen



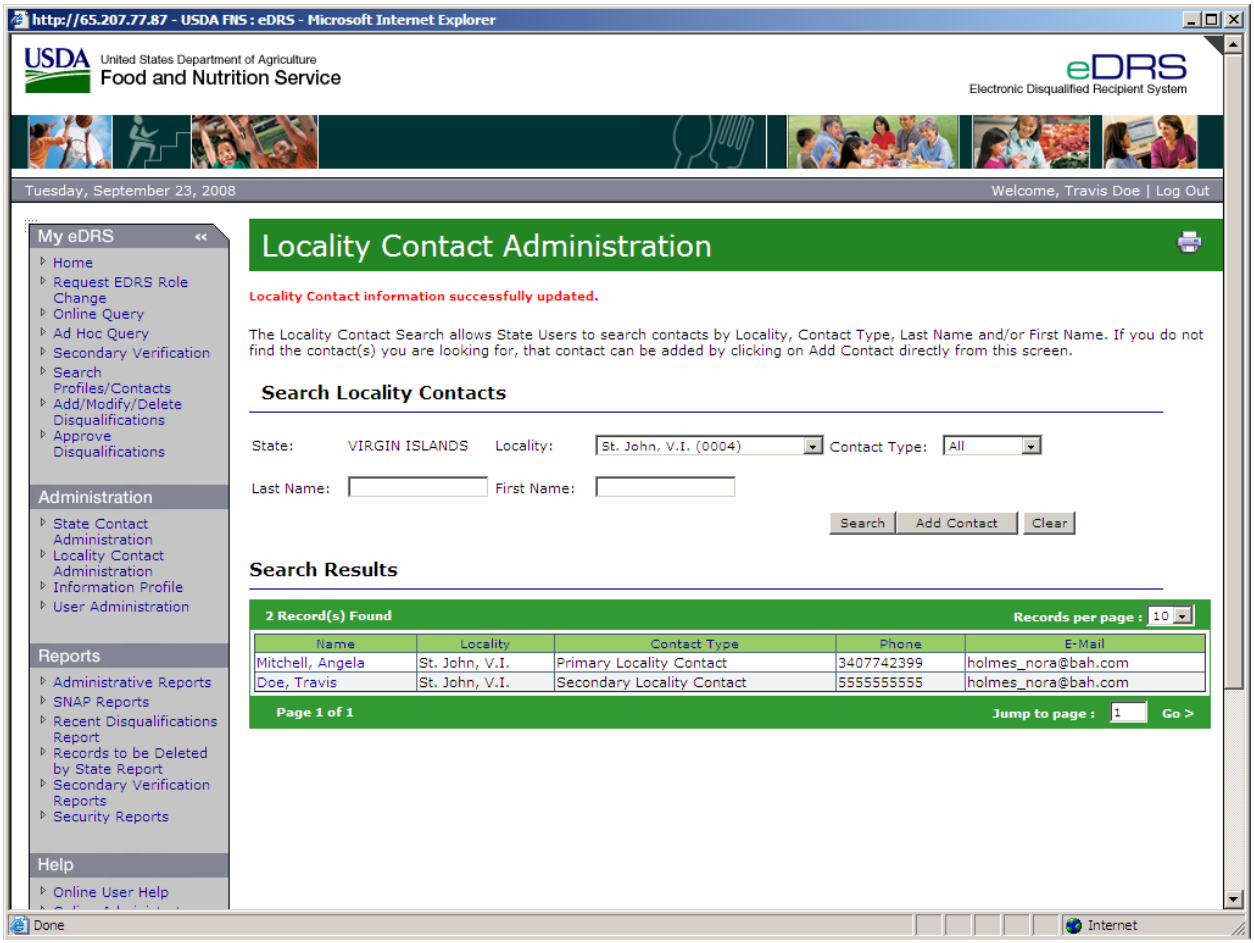
Search for a contact by entering first and/or last name and clicking **Search**, or click on the name of a user from the Search Results list. The Add Locality Contact Screen will appear as shown in Figure 32.

Figure 32. Add Locality Contact Screen



3. Select one Locality or multiple **Localities** from the multi-select list by clicking in the box(es) in the **Primary or Secondary column**.
4. To exit out of this screen without saving the changes, click **Cancel.**
5. Click **Submit** to save the Locality Contact information. The Search Locality Contacts screen will display confirming that the locality contact information has been successfully added as shown Figure 33.

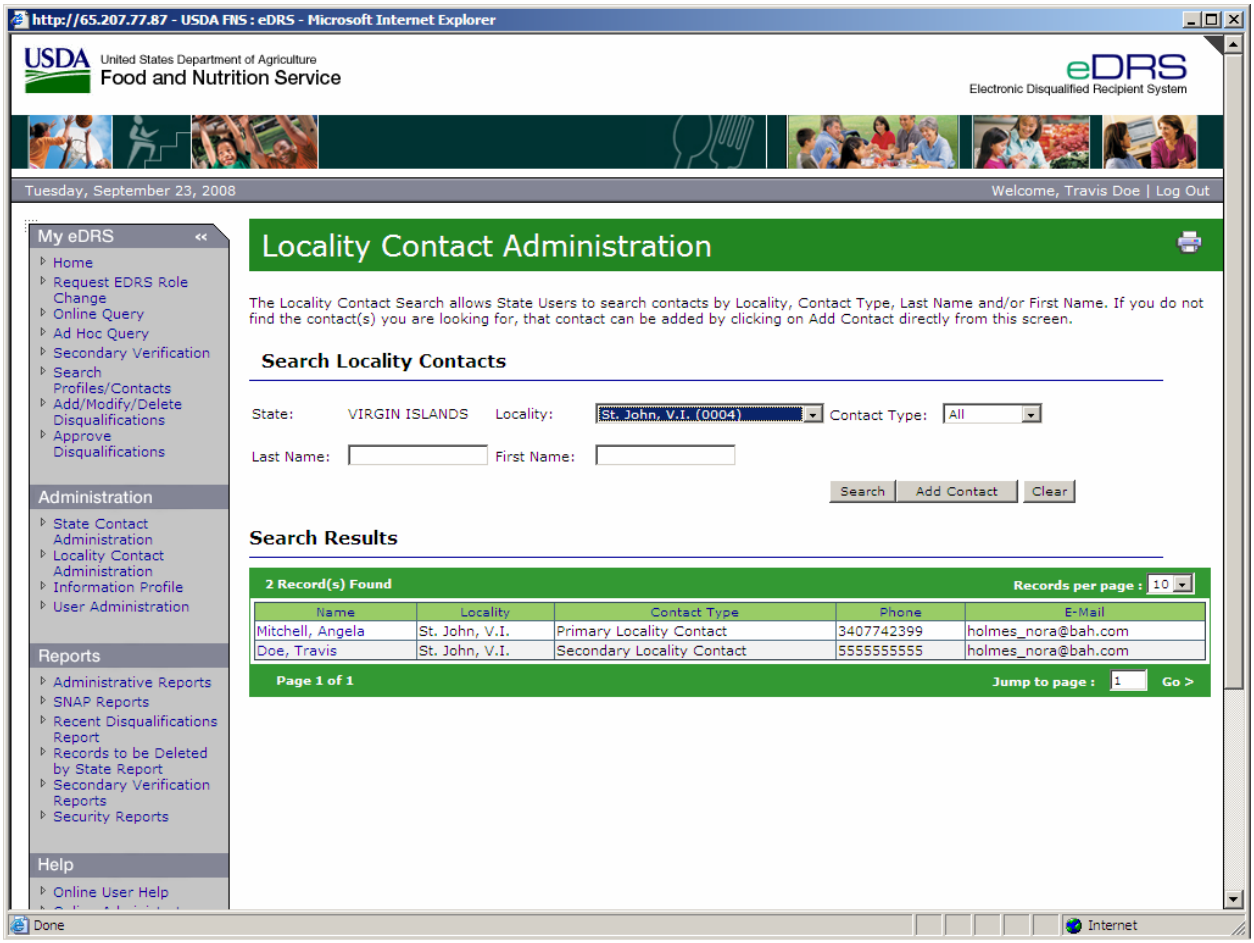
Figure 33. Search Locality Contacts Screen



To modify or delete a Locality Contact in the system:

1. Click **Locality Contact Administration** under Administration on the left menu bar. The Locality Contact Administration page defaults to the Locality Contacts Search screen as shown in Figure 34.

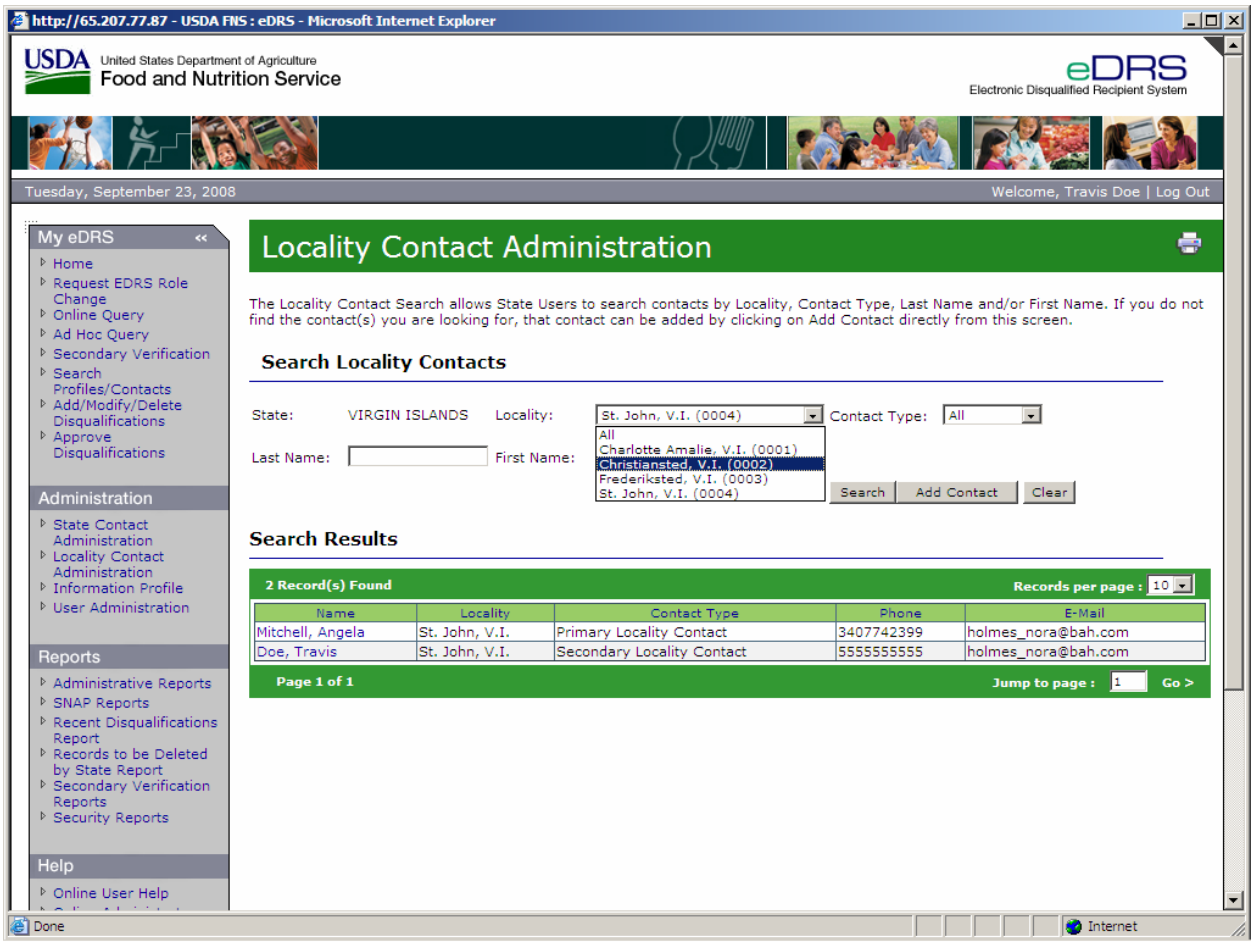
Figure 34. Locality Contact Administration Screen



2. To search for a contact from a specific locality, select the **Locality** and **Contact type** from the drop down list and click on the **Search** button as shown in Figure 35.

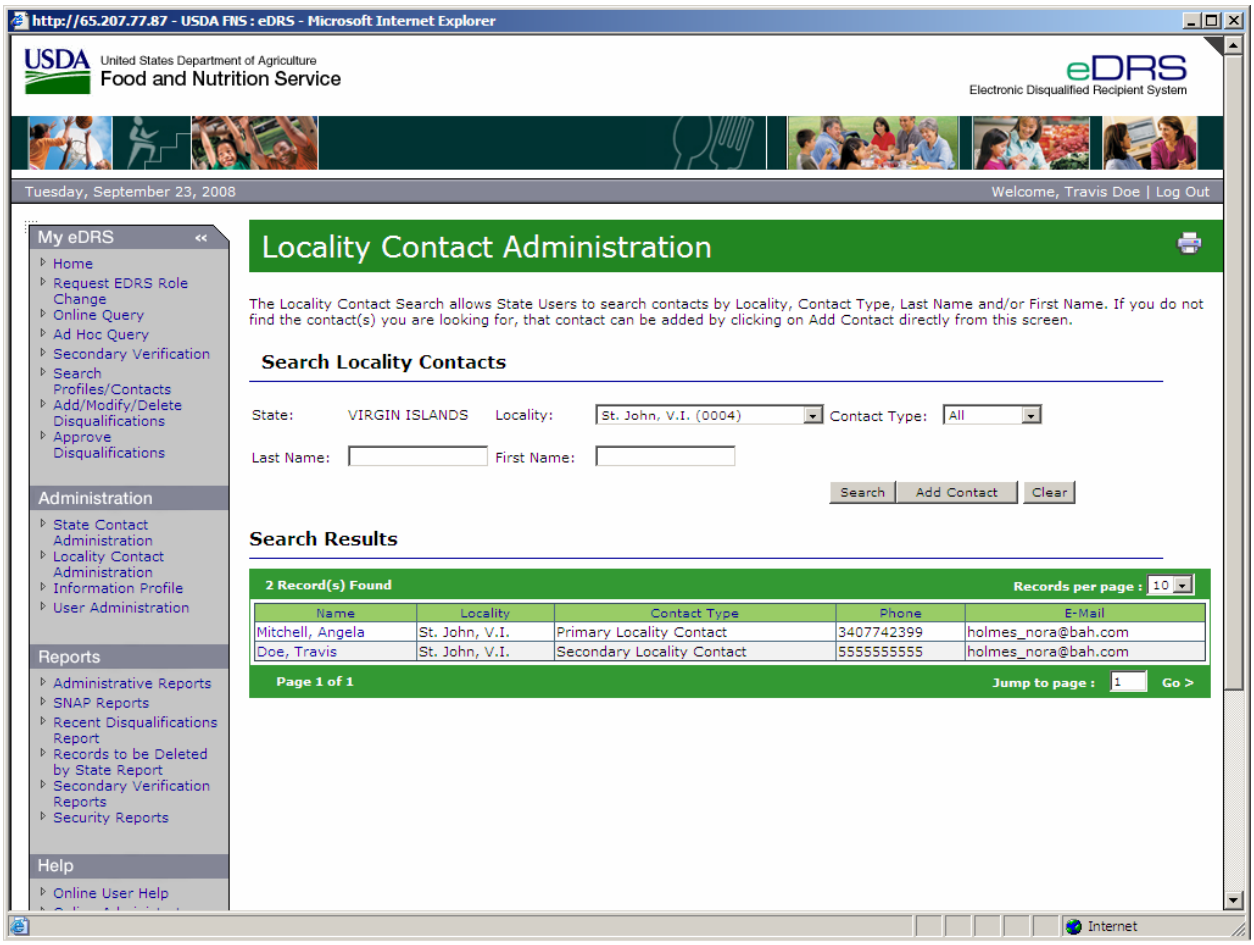
Note: The Locality drop down menu will default to the Locality to which your user name is related. State users can select from the all other localities in their state.

Figure 35. Search Locality Contacts Screen



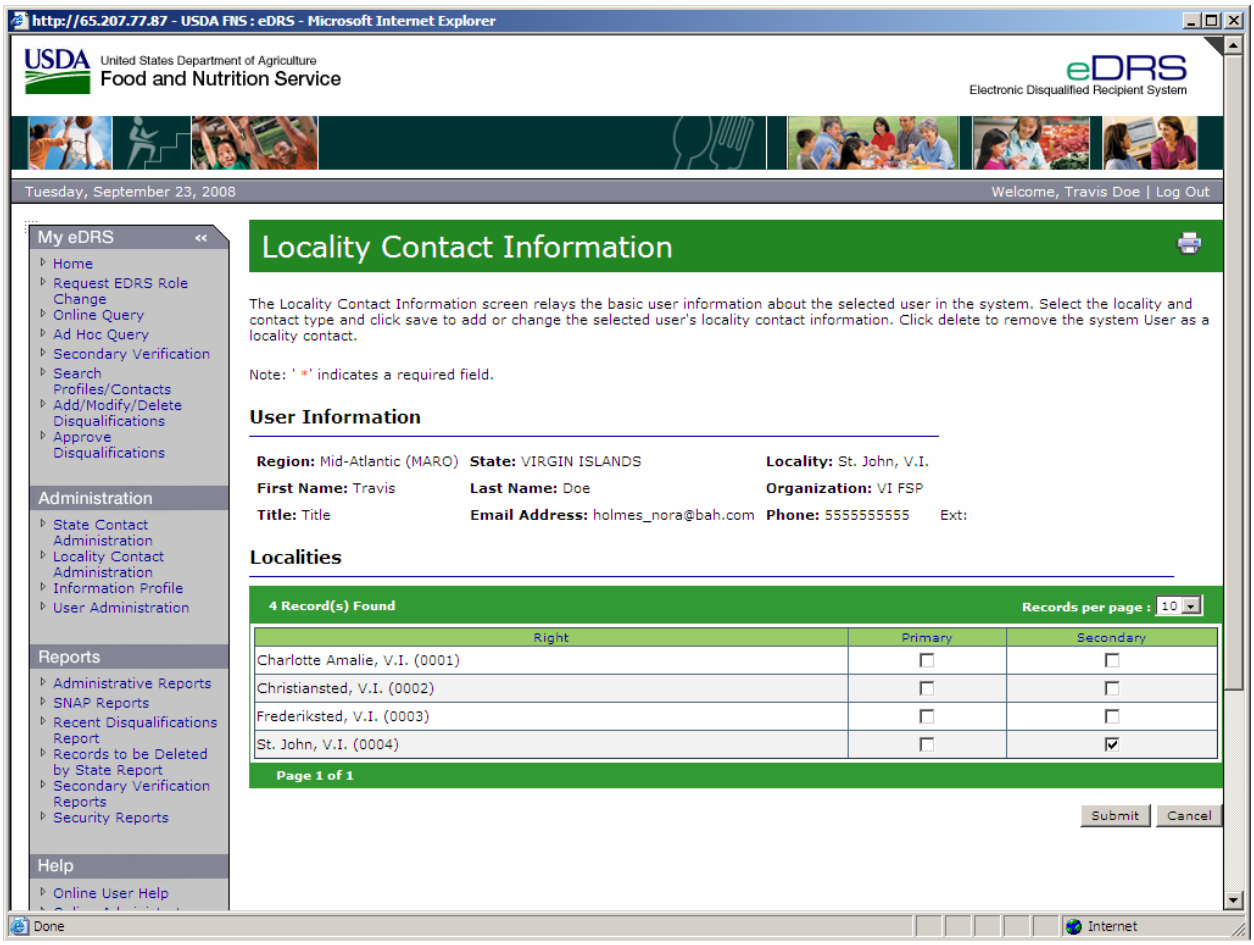
3. To narrow the search, enter the **Last Name** and/or **First Name** and click the **Search** button**.** The search results are shown in Figure 36.

Figure 36. Search Results Screen



4. To view the **Locality Contact User Information**, click on the name of the locality contact as shown in Figure 37.

Figure 37. Locality Contact User Information



5. To change the Locality Contact, select Locality/Localities from the multi-select list by clicking in the box(es) in the **Primary** or **Secondary** column and click **Submit**.

Note: User information cannot be modified from this screen; the only change that can be made is to the Contact Type for a Locality Contact. However, Locality Contact information from non-participating states cannot be modified at all, as it is obtained through batch data transmission.

6. To remove a contact name as a Locality Contact, uncheck box(es) and click **Submit**. The Search Locality Contact screen will display confirming that the locality contact information has been removed.

Note: Removing a contact only removes the contact category associated with the contact name; it does not delete the user information.

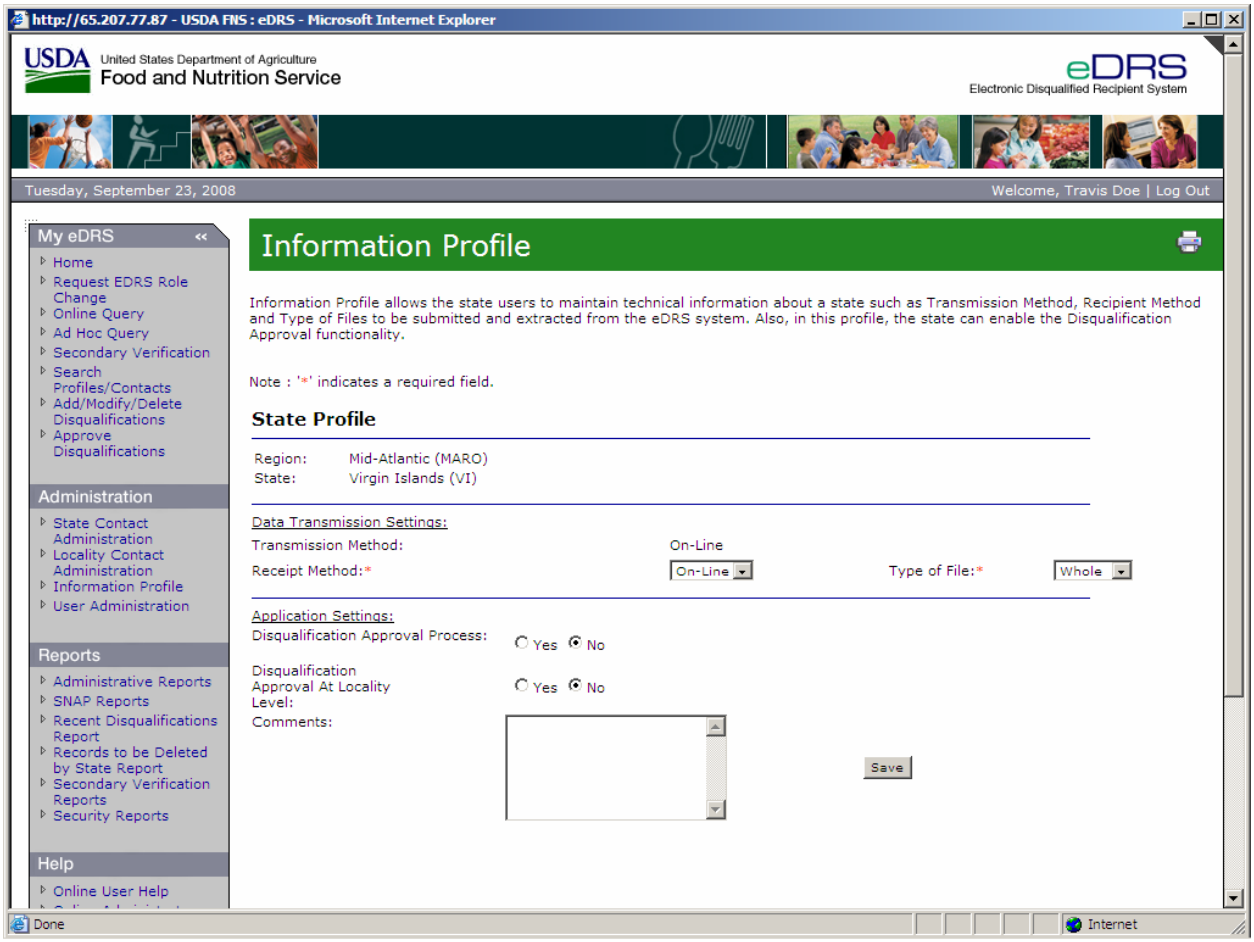
4.4 Maintaining the Information Profile

Information Profile allows the state users to maintain technical information about a state such as Transmission Method, Receipt Method, Type of Files to be submitted and extracted from the eDRS system, Online Contact Management, the level at which Disqualification Approval Process will be conducted, and State Contacts.

To modify the Information Profile for a state submitting records online:

1. Click **Information Profile** under **Administration** on the left menu bar as shown in Figure 38. The State Profile page defaults to the state or region to which your user profile is related.

Figure 38. State Profile, Online Submission Screen



The Data Transmission Settings can be modified in the State Profile; these settings include the Transmission Method, Receipt Method and Type of File. These settings are for information purposes only and do not modify the states profile in the system. Also a state can modify the Application settings. These settings default to "No" and if changed to "Yes" will activate specific functionality.

2. The **Transmission Method** will automatically be populated as shown in Figure 38.
3. Select **Batch** or **Online** for **Receipt Method**.
4. Select **Match**, **None**, **Update** or **Whole** from the **Type of File** drop down list.
5. If your state is using eDRS to submit disqualifications, the **Disqualification Approval Process** can be selected. This will activate the Approval Process functionality requiring all approvals to be routed to a user for approval prior to being saved in eDRS.

Note: The option to participate in the online Approval Process defaults to "No."

6. If your state is using the eDRS Disqualification Approval Process, the user may choose to

have approvals assigned at the Locality level.

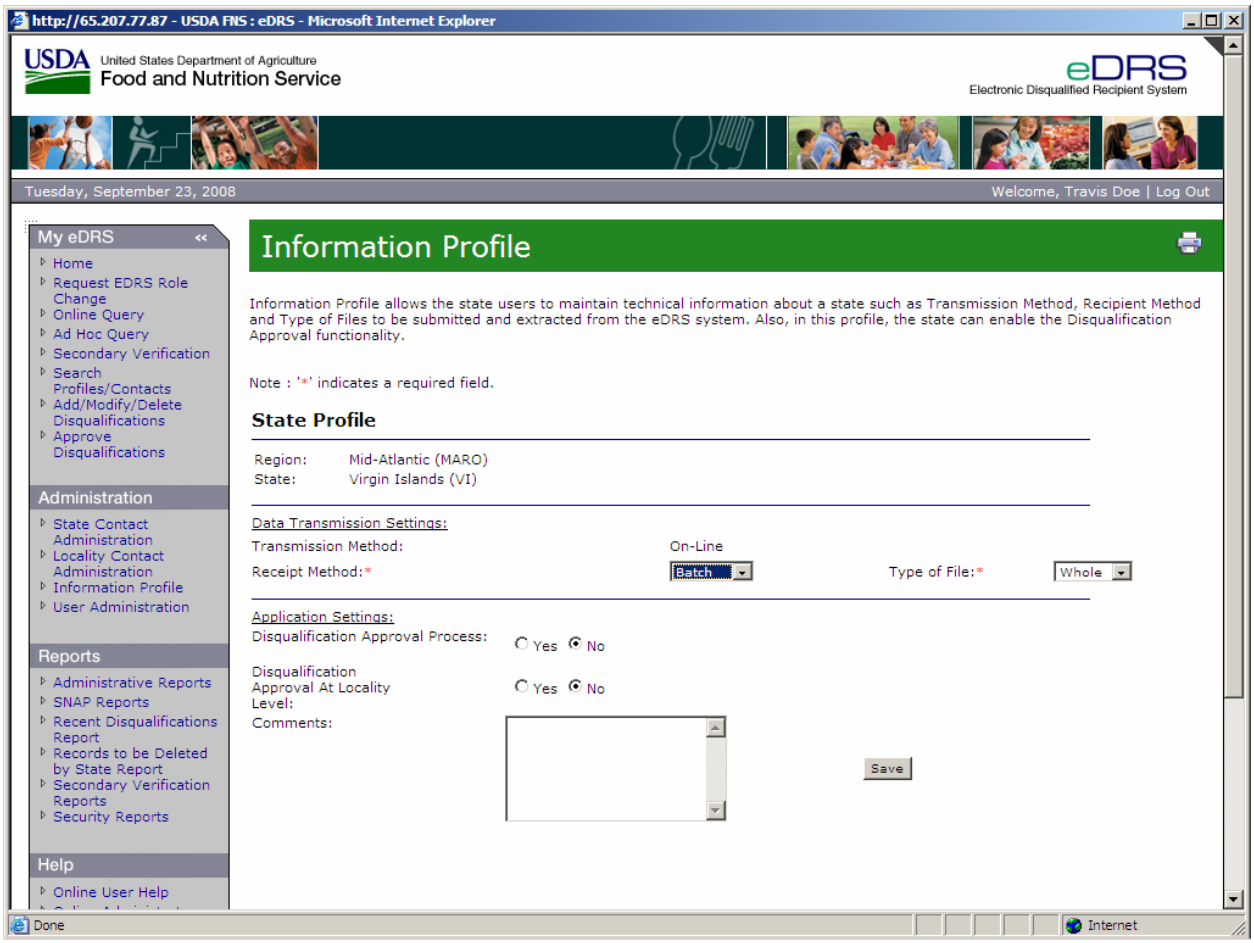
Note: The "Approve Disqualifications at the Locality Level" defaults to "No".

7. Enter any additional comments about your state profile in the **Comment** field.
8. Click the **Save** button to update the profile.

To modify the Information Profile for a state submitting batch records:

1. Click **Information Profile** under **Administration** on the left menu bar as shown in Figure 39. The State Profile page defaults to the state or region to which your user profile is related.

Figure 39. State Profile, For a Batch Submission Screen



The Data Transmission Settings can be modified in the State Profile; these settings include the Transmission Method, Receipt Method and Type of File. These settings are for information purposes only and do not modify the states profile in the system. Also a state can modify the Application settings. These settings default to "No" and if changed to "Yes" will activate specific functionality.

2. The **Transmission Method** will automatically be populated as shown in Figure 39.
3. Select **Batch** or **Online** for **Receipt Method**.
4. Select **Match**, **None**, **Update** or **Whole** from the **Type of File** drop down list.

5. The **Date of Last Data Transmission** and **Date File Retrieved** fields will be populated automatically by the system and are unable to be edited.
6. Select **Online Contact Management** by clicking the radio button **Yes** or **No**. By selecting **Yes**, this will enable a Batch state to manage contact information online rather than sending this information through batch data transmission. This will enable the state to participate in the automated request and tracking of secondary verifications. Once the setting is set to **Yes**, it cannot be changed back to **No**.
7. Enter any additional comments about your state profile in the **Comment** field.
8. Click the **Save** button to update the profile.

4.5 Administering Roles

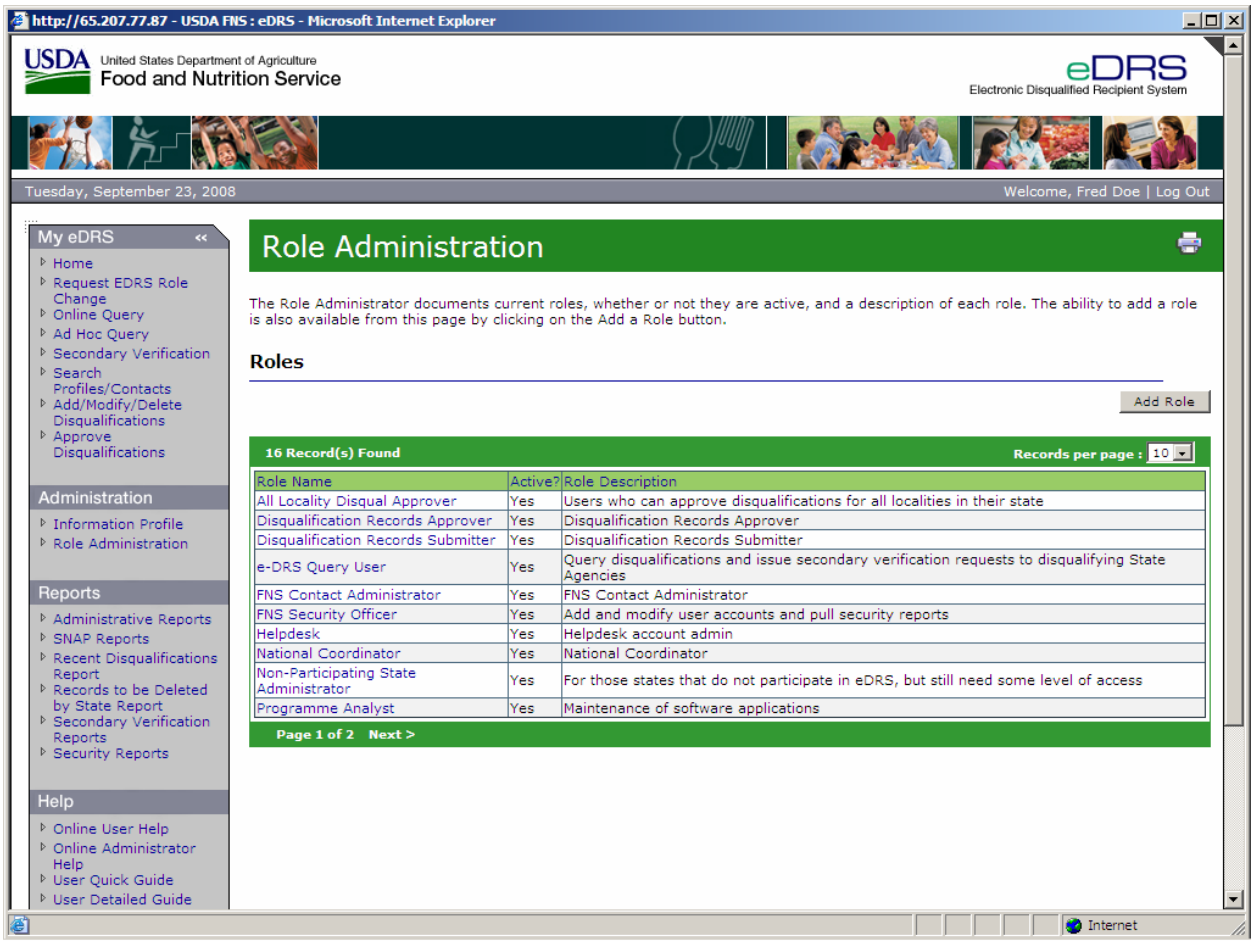
Role administration functionality allows administrators to create new roles, assign rights to roles, and modify current roles. eDRS functionality is bundled into roles. Users are then assigned roles when given access to eDRS. (User access is provided through the CSAMS process). The Role Administration function allows administrators to perform the following functions:

- *Create new roles* – This function allows administrators to create entirely new roles within the system. This task will most likely be performed infrequently. However, should the need arise for a new role within the system, an administrator can create one from the Role Administration link.
- *Assign rights to roles* – This function enables the administrator to assign rights. Rights are the functions a user can perform within the system. Roles are a combination of rights that one type of user or "role" can perform within the system. This task will be performed infrequently, as it is rare that the rights assigned to user roles will change.
- *Modify current roles* – This function allows an administrator to change the name or description of a role, or make the role active/inactive. This task will be performed infrequently; however, the system allows for flexibility in making changes as needed.

To create new roles in the application:

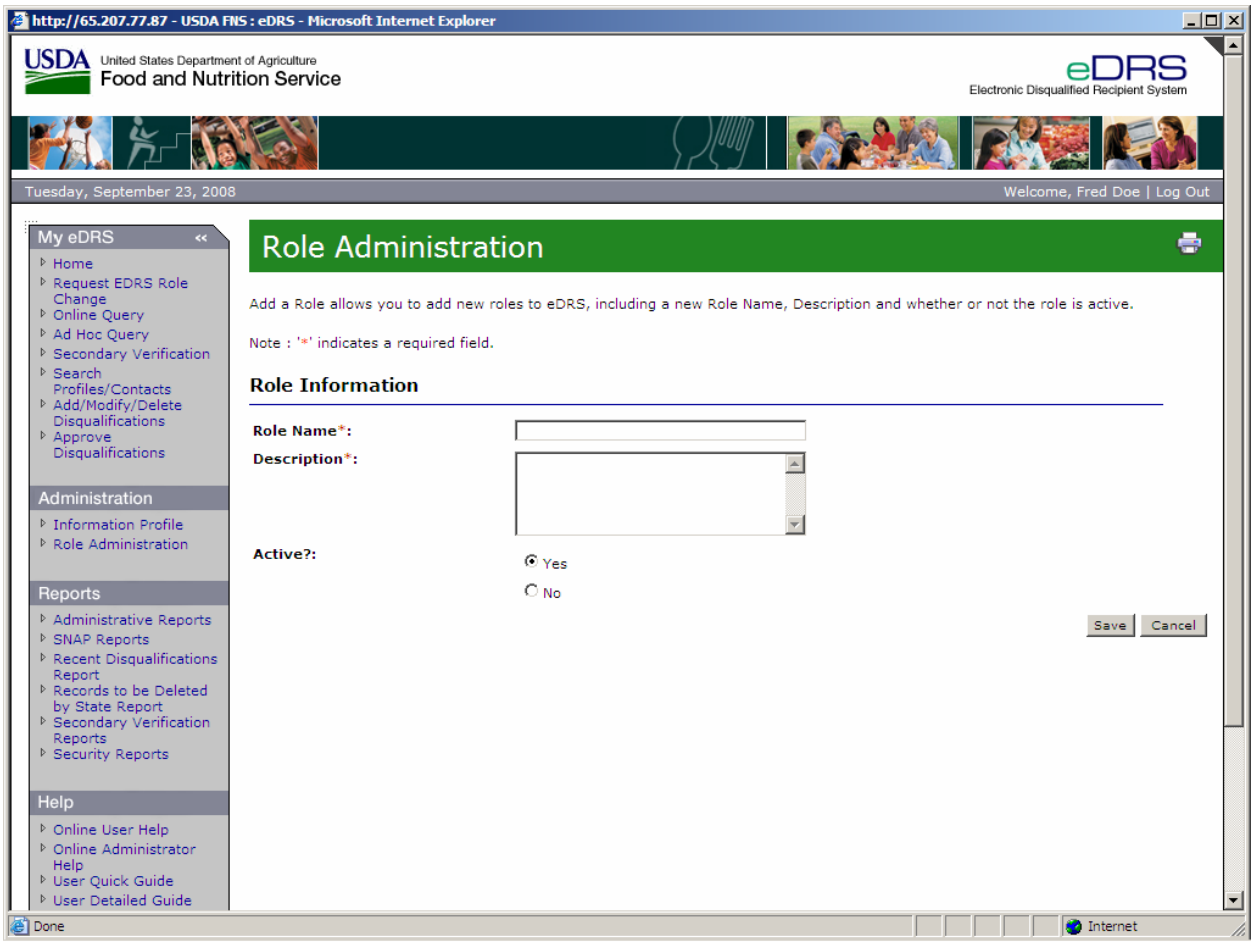
1. Click on **Role Administration** on the left menu bar. The Role Administration screen will appear, as shown in Figure 40.

Figure 40. Role Administration Screen



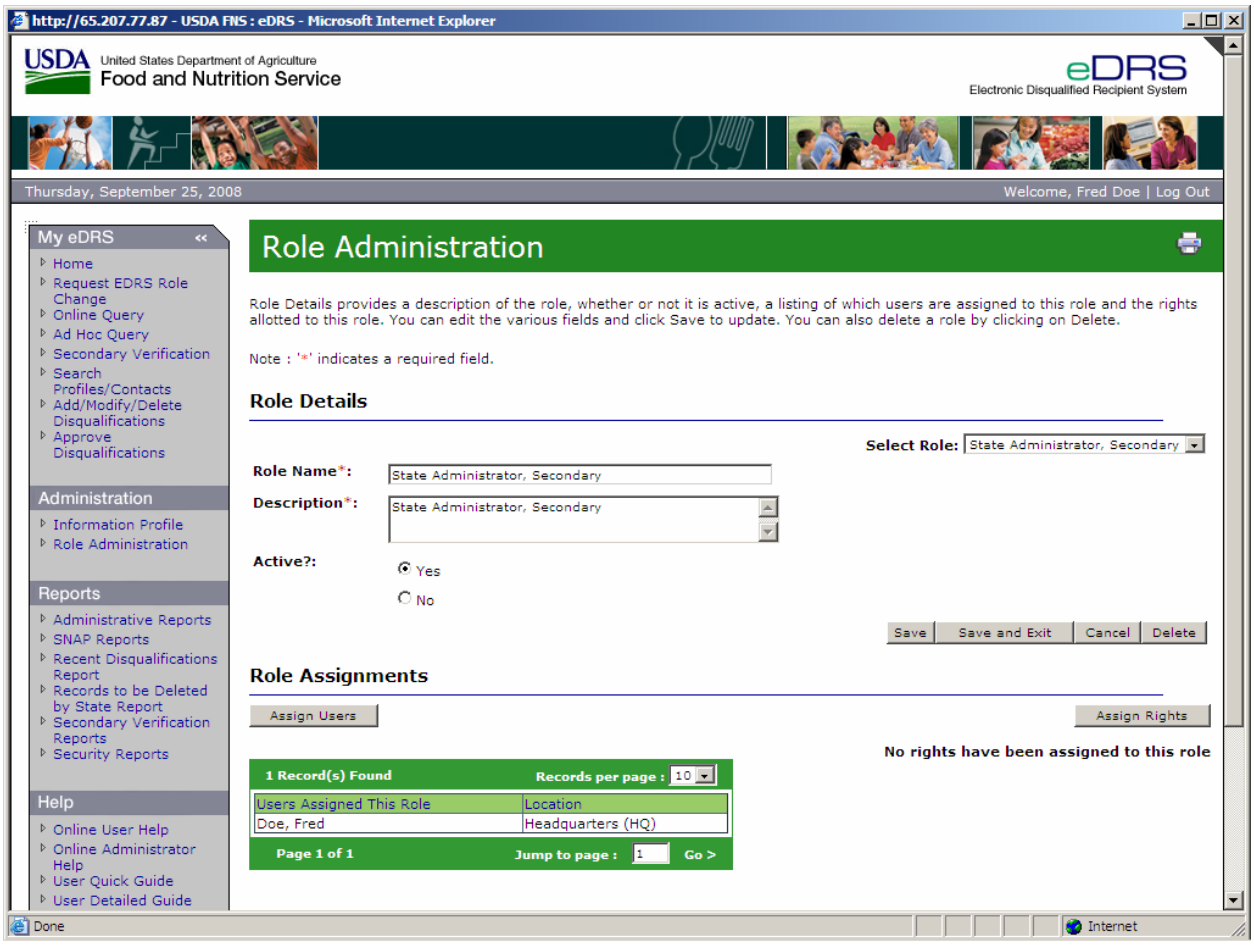
2. Click on **Add Role** and the Role Administration Role Information Screen will appear, as shown in Figure 41.

Figure 41. Role Information, Add Role Screen



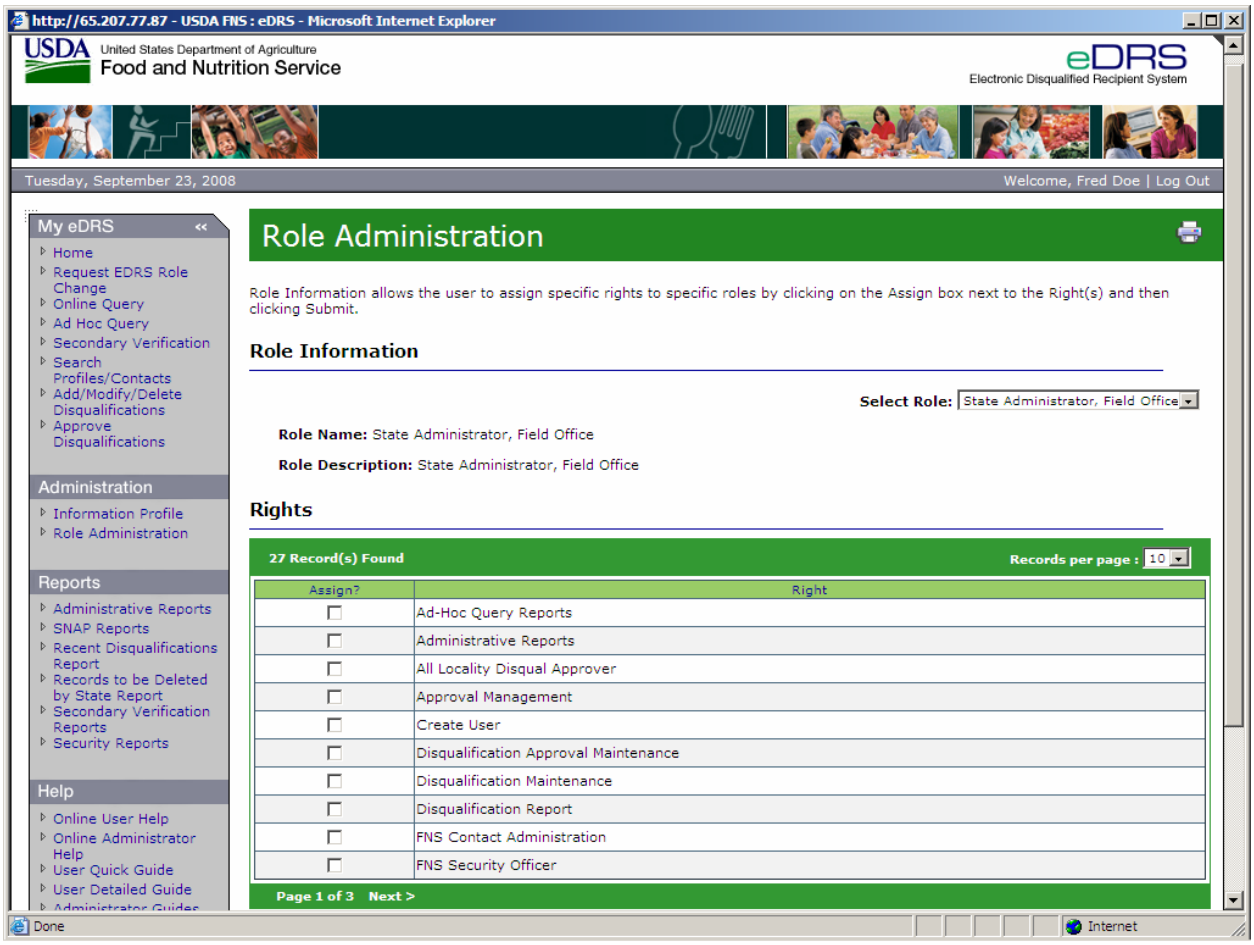
3. Enter role name in the **Role Name** field for the new role.
4. Enter the description of the role in the **Description** field.
5. Indicate whether or not the role is active by clicking the **Yes** or **No** radio button.
6. Click the **Save** button to save the new role. This will take you to the Role Details page as shown in Figure 42 where you will need to assign rights to the new role.

Figure 42. Role Details, Add New Role Screen



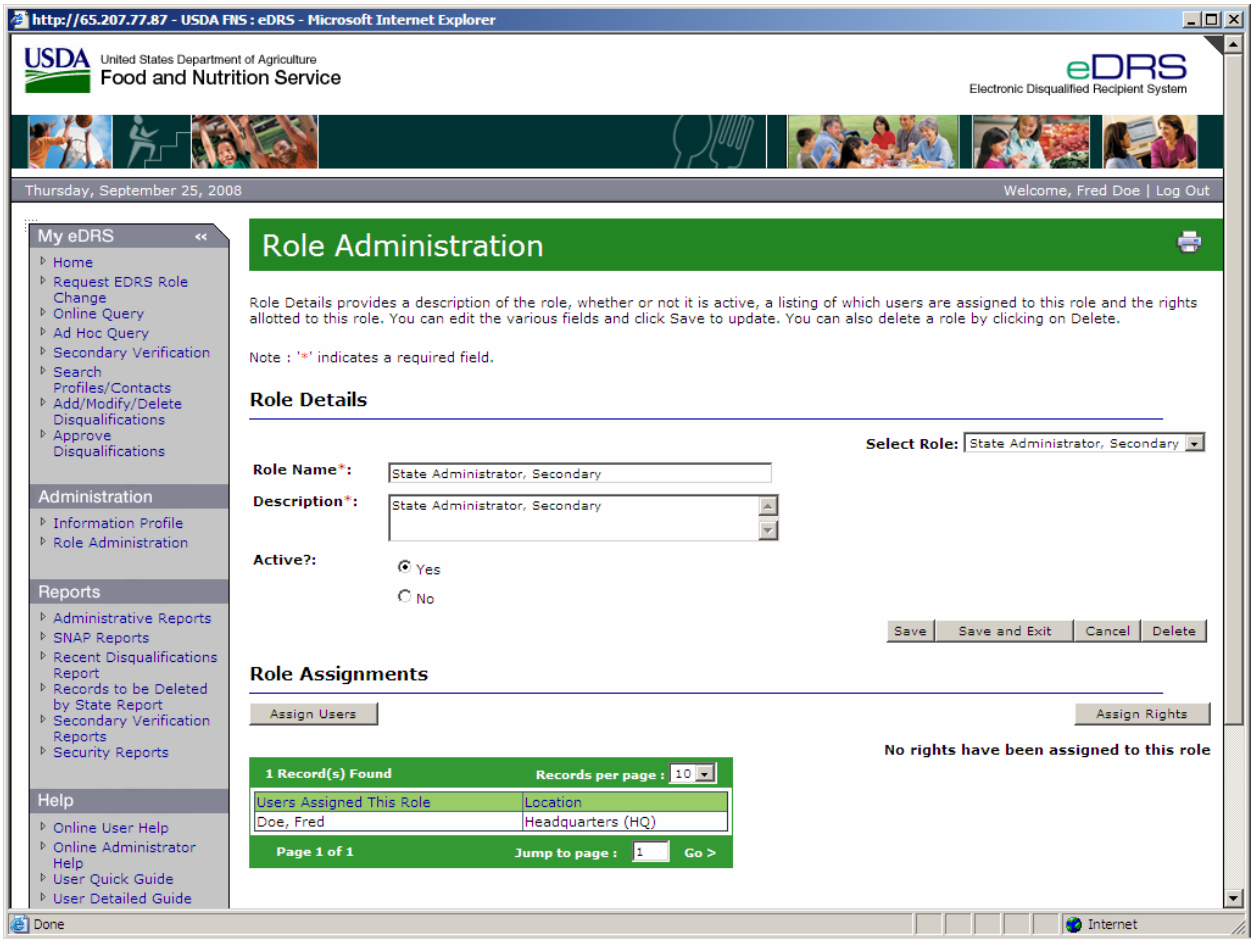
7. Click the **Assign Rights** button to assign rights to that particular role. This will display the Role Information Screen as shown in Figure 43.

Figure 43. Role Information, Assign Rights Screen



8. Assign the desired rights to the role by clicking on the checkbox next to each right. Click the **Submit** button to return to the Role Details screen as shown in Figure 44.

Figure 44. Role Details, Rights Assigned Screen

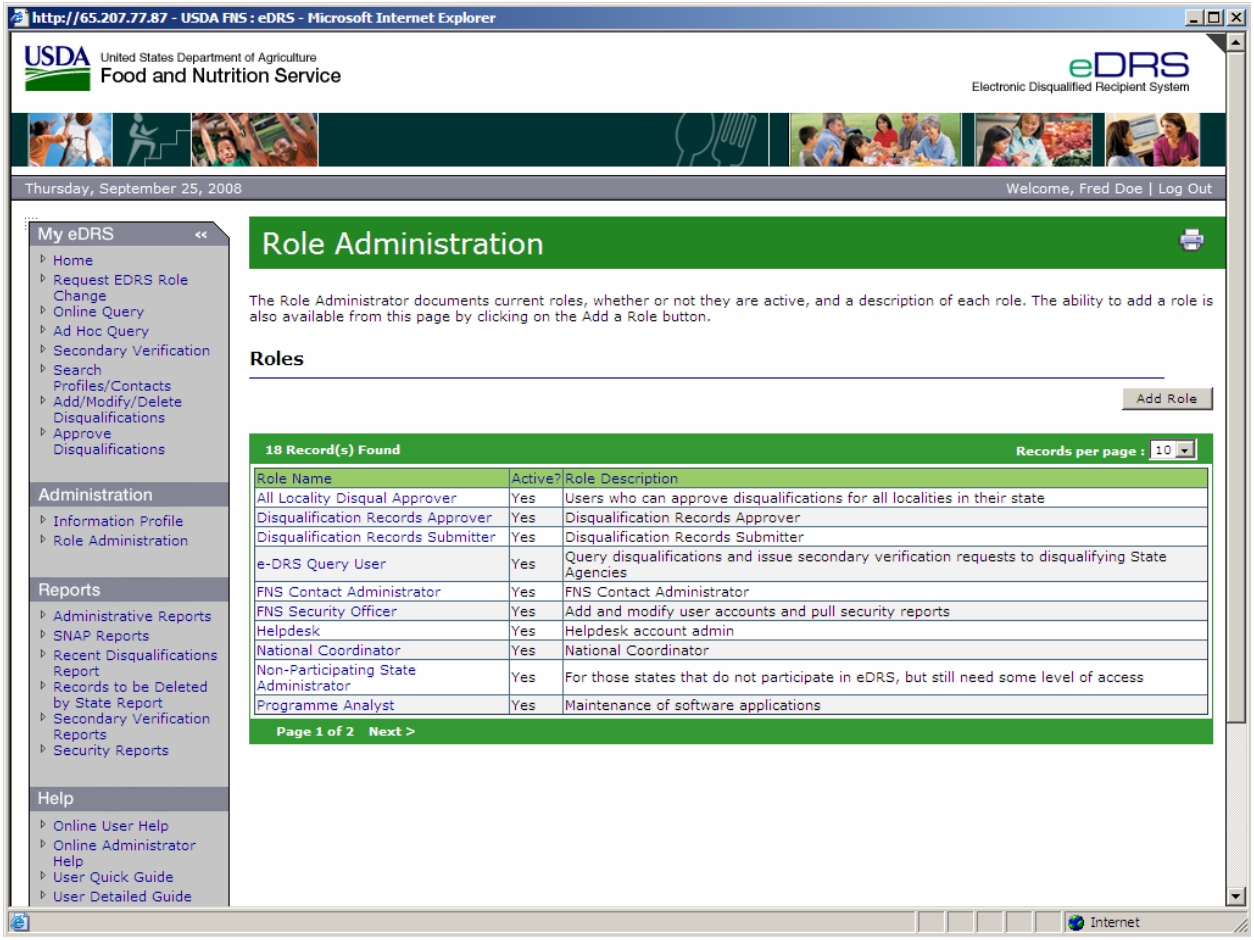


9. Click **Save** to save your changes and continue work in Role Administration. To save and exit, click **Save and Exit**. To cancel the new role, click the **Cancel** button.

To assign rights to an existing role:

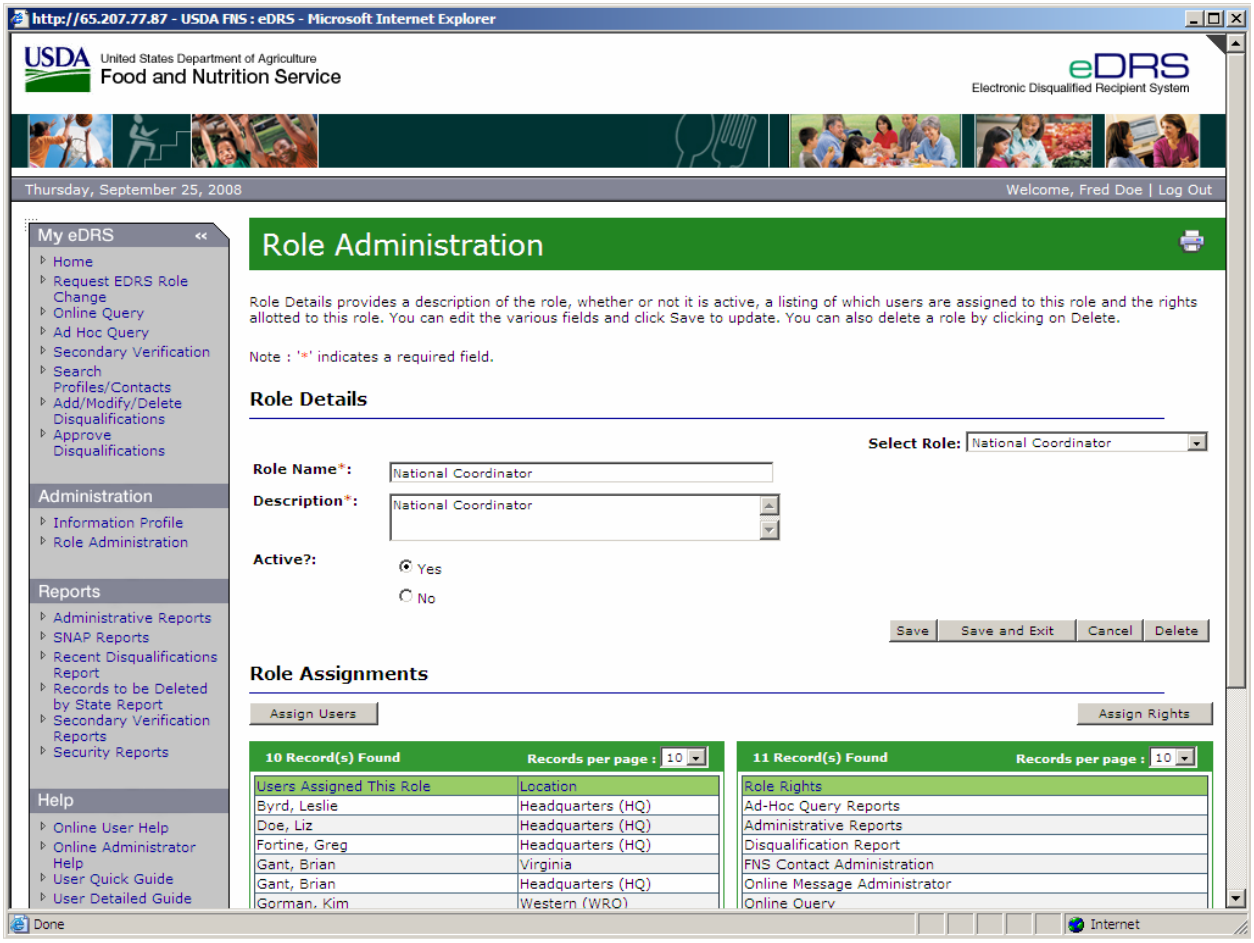
1. Click on **Role Administration** on the left menu bar. The Role Administration screen will appear as shown in Figure 45.

Figure 45. Role Administration Screen



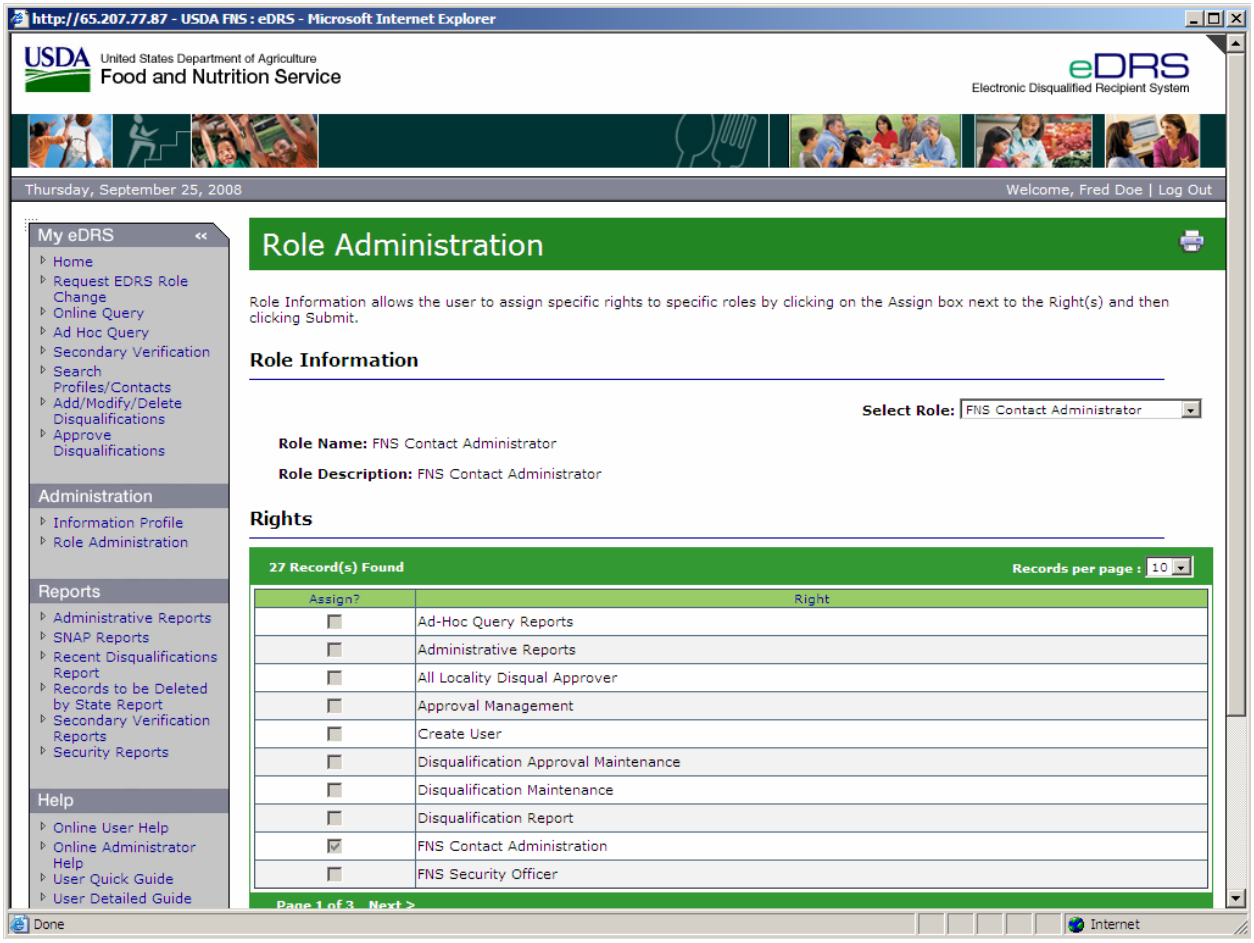
2. Click on the **Role Name** to which you would like to assign rights, for example, State Administrator. This will take you to the Role Details Screen as shown in Figure 46.

Figure 46. Role Details Screen



3. Click the **Assign Rights** button to assign rights to that particular role. This will display the Role Information Screen as shown in Figure 47.

Figure 47. Role Information, Assign Rights Screen

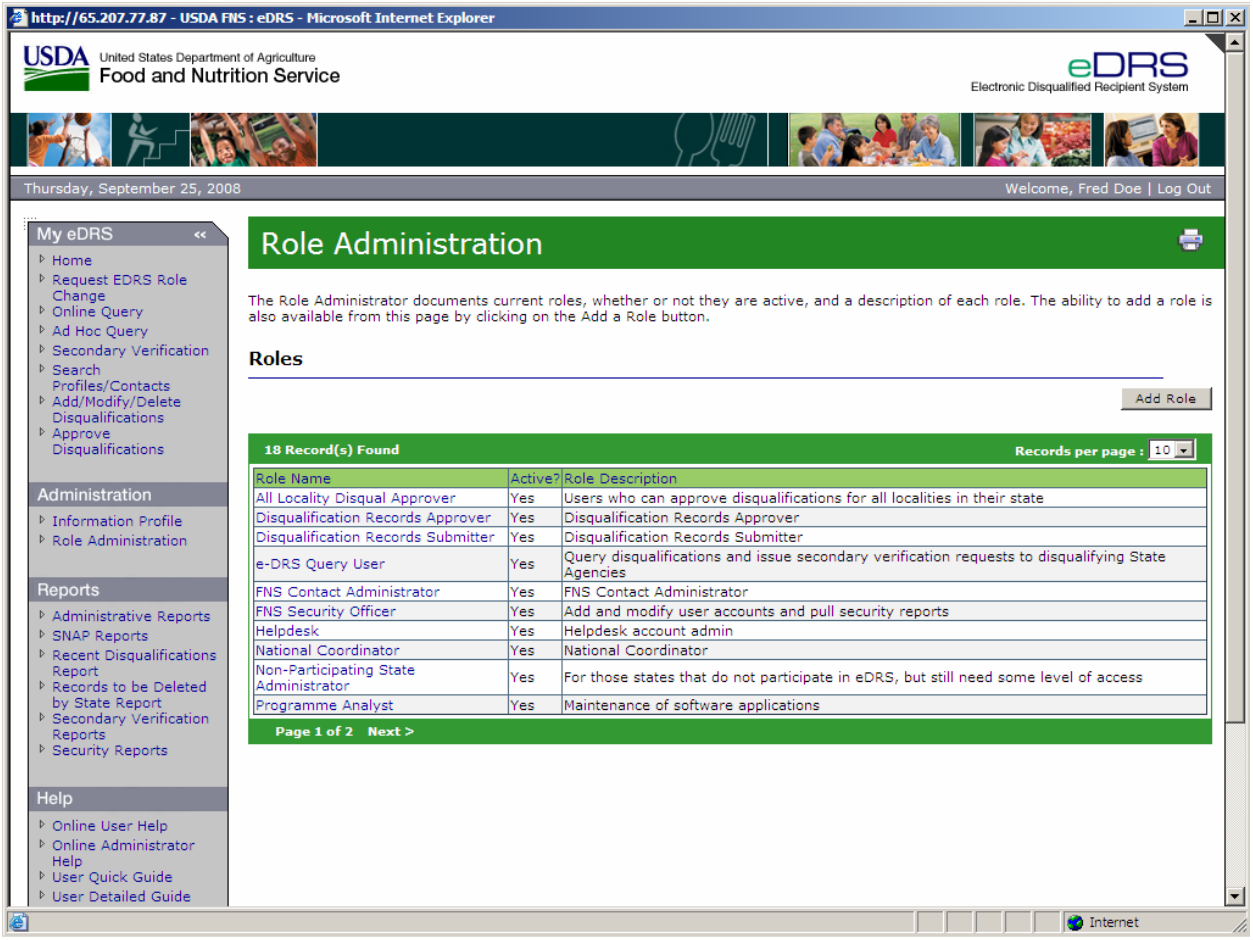


4. Assign (or un-assign) the desired rights to the role by clicking on the checkbox next to each right. Click the **Submit** button.
5. To cancel any changes made, click the **Cancel** button.

To modify a current role:

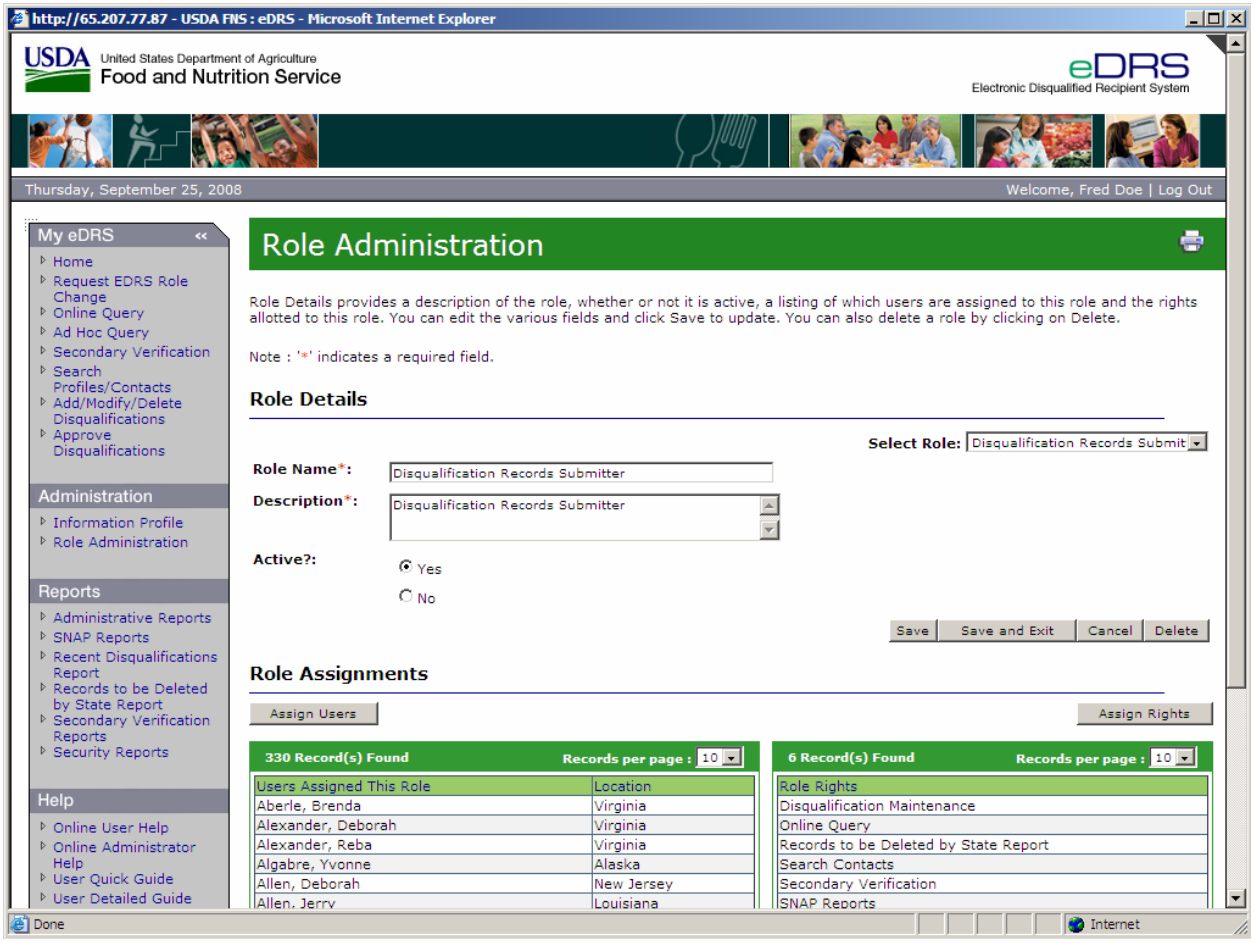
1. Click on **Role Administration** on the left menu bar. The Role Administration screen will appear, as shown in Figure 48.

Figure 48. Role Administration Screen



2. Click on the **Role Name** to view the Role Details, for example, FNS Security Officer, as shown in Figure 49.

Figure 49. Role Details Screen



3. Make the desired changes in the Role Details screen. For example, you can edit the **Role Name**, edit the **Description**, make it Active or Not Active by clicking the **Yes** and **No** radio buttons, and/or modify the rights assigned to the role. Click **Save** to save your changes and remain on the Role Details screen, or click **Save and Exit** to save your changes and return to the Role Administration screen.
4. To cancel any changes made, click the **Cancel** button.

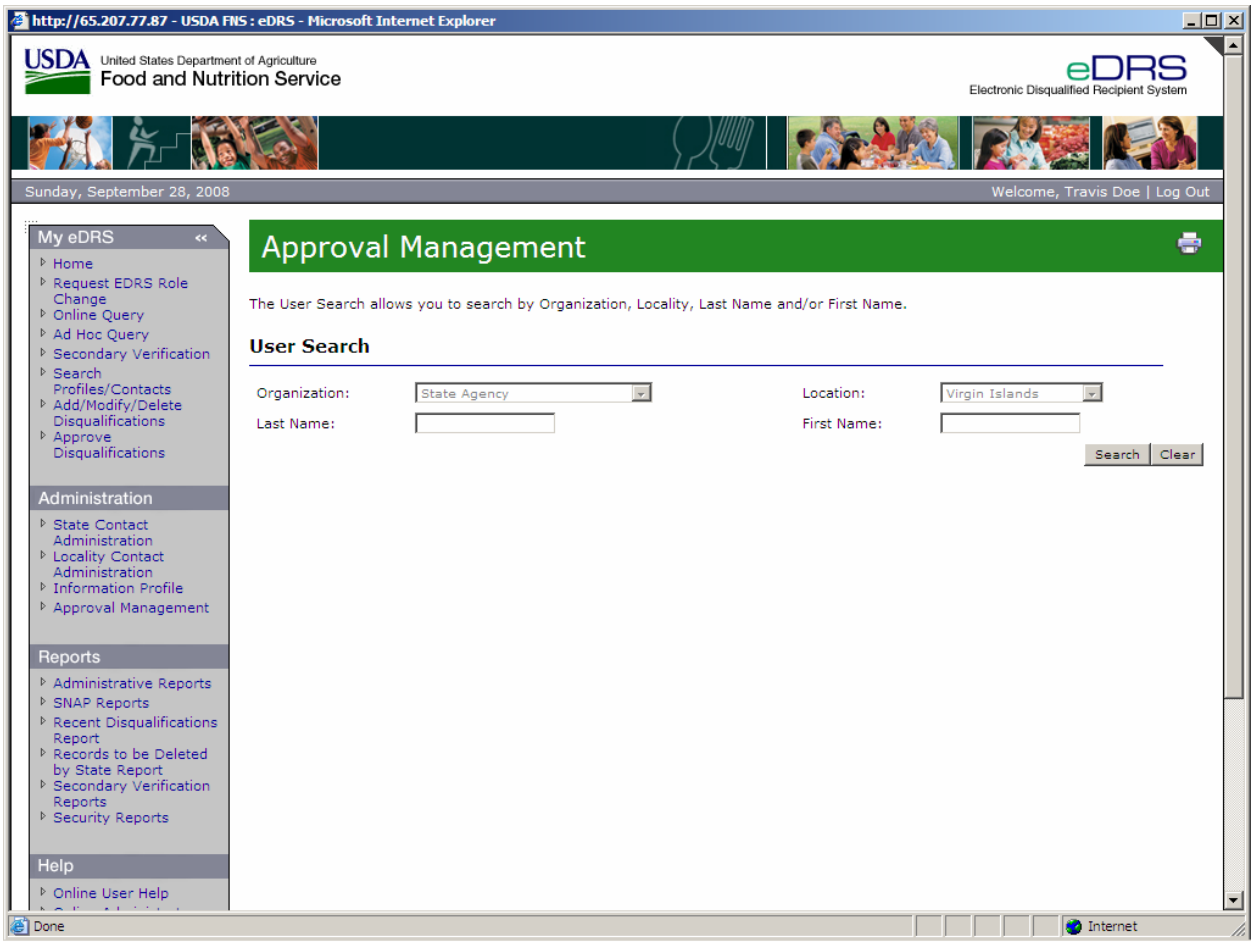
4.6 Approval Management

Approval Management allows users to assign users to approve disqualifications at the locality level. A user can be assigned one or more localities to approve, and more than one user can be assigned to a locality. This functionality is only applicable if a state has chosen "Yes" for the Disqualification Approval at the Locality Level in the information profile.

To assign an Approver:

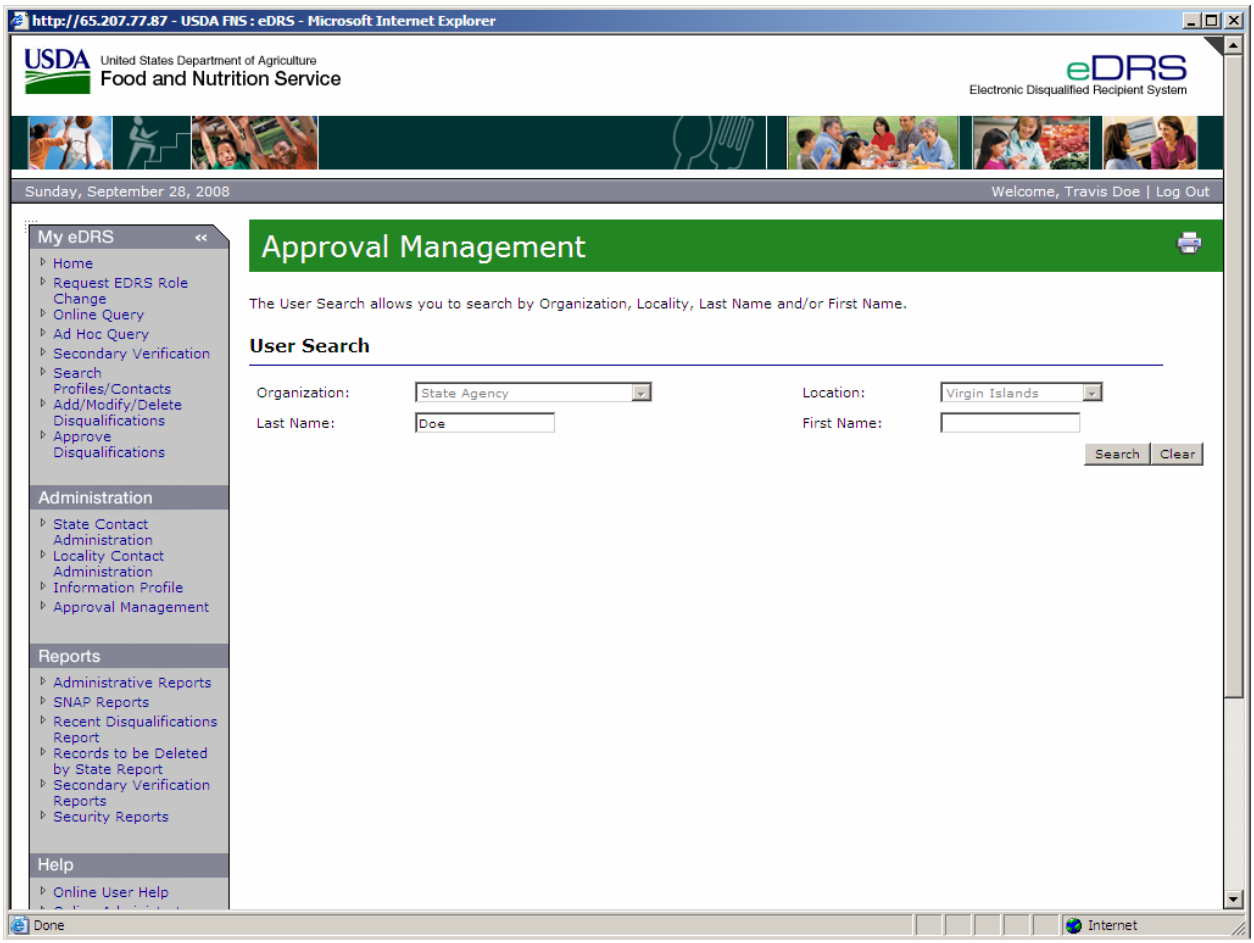
1. Click on **Approval Management** on the left menu bar under Administration as shown in Figure 50.

Figure 50. Approval Management Screen



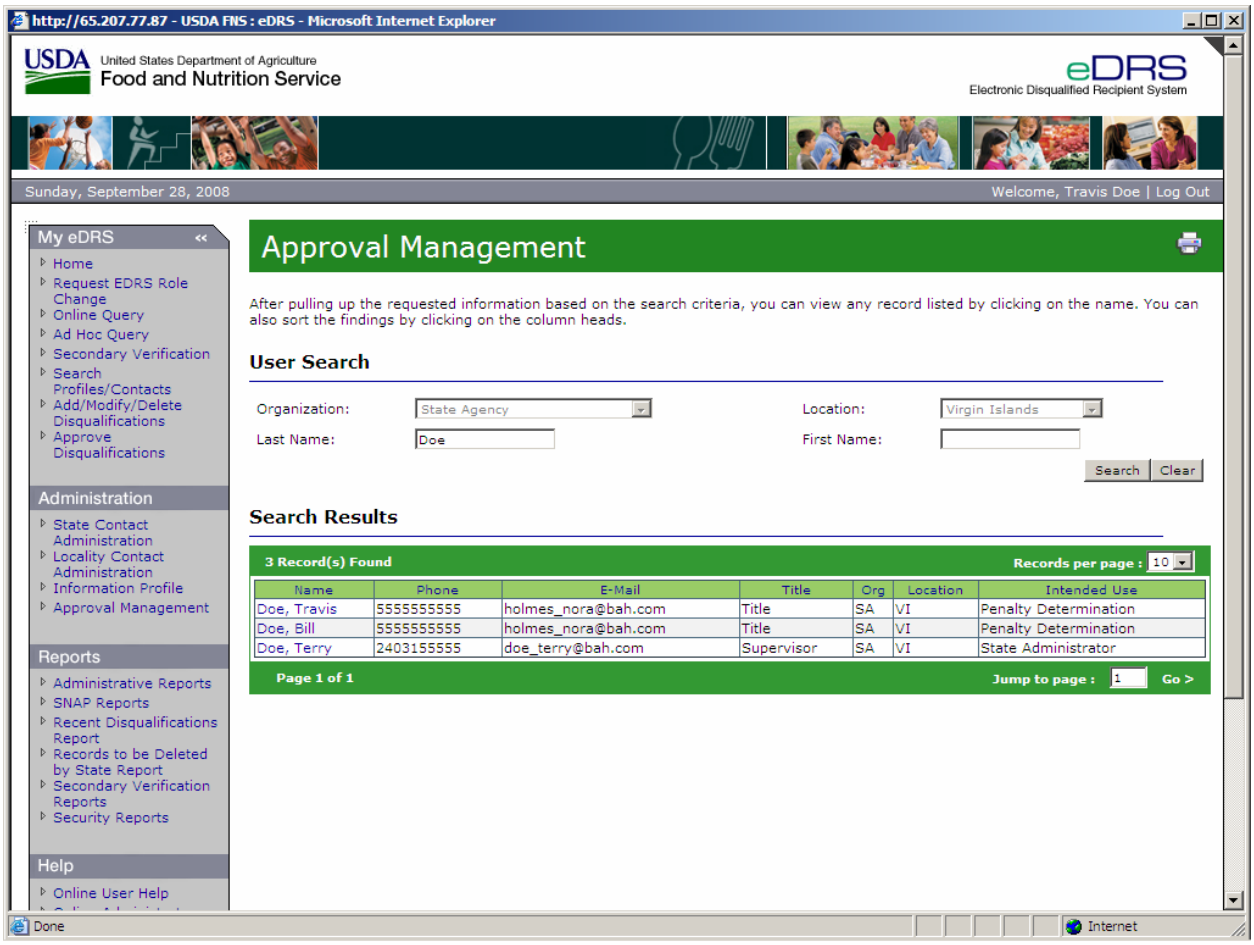
2. Enter the name of the person you would like to assign as an Approver and click **Search** as shown in Figure 51. You may narrow your search results by selecting an organization and/or locality. The figure below is for a search using Last Name only.

Figure 51. Approval Management, User Search Screen



3. The search results will return all users that met the entered search criteria.
4. From the Search Results screen shown in Figure 52, click the **Name** of the person you wish to assign as an approver as shown.

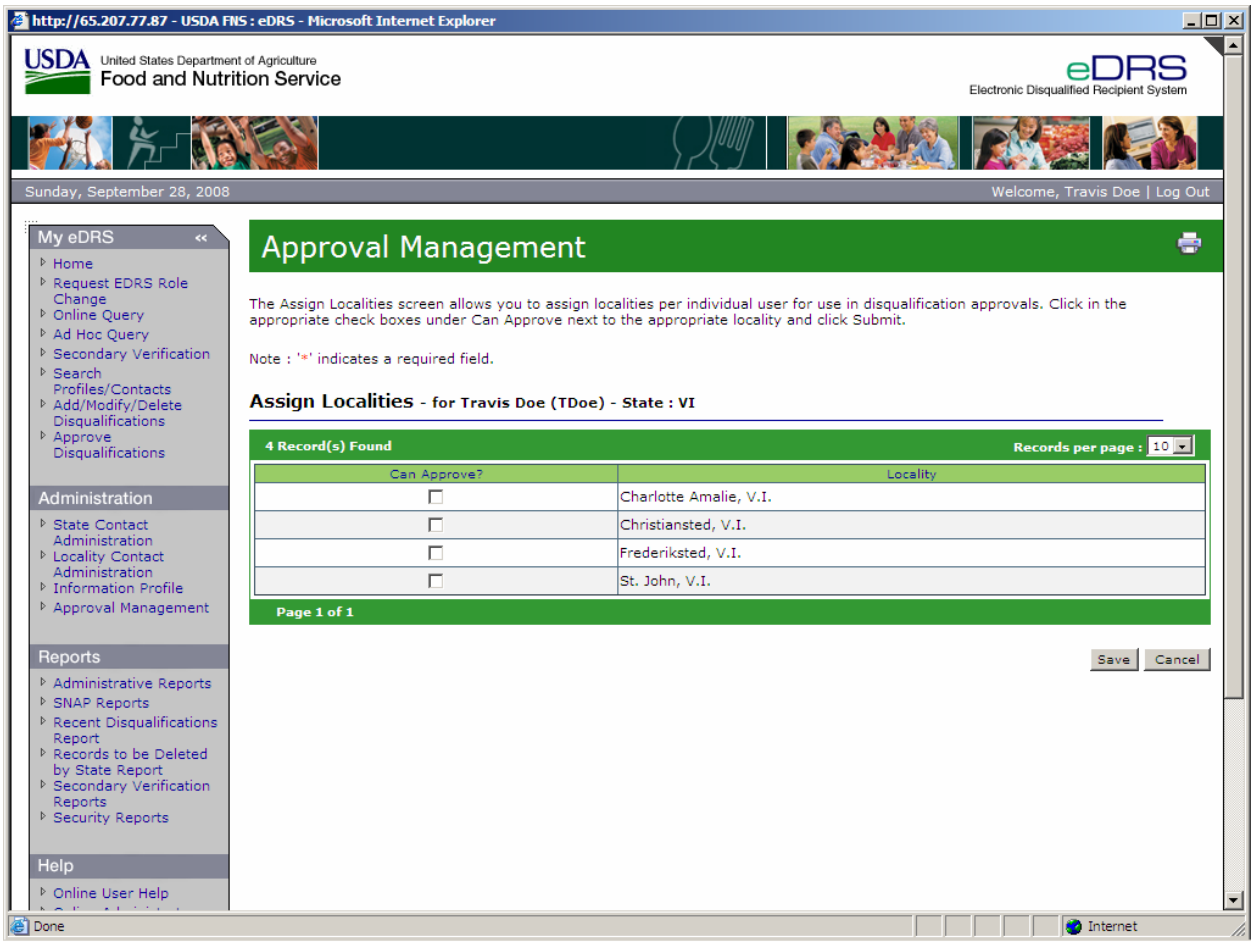
Figure 52. Approval Management, Search Results Screen



5. The Assign Localities Screen is shown as displayed in Figure 53.

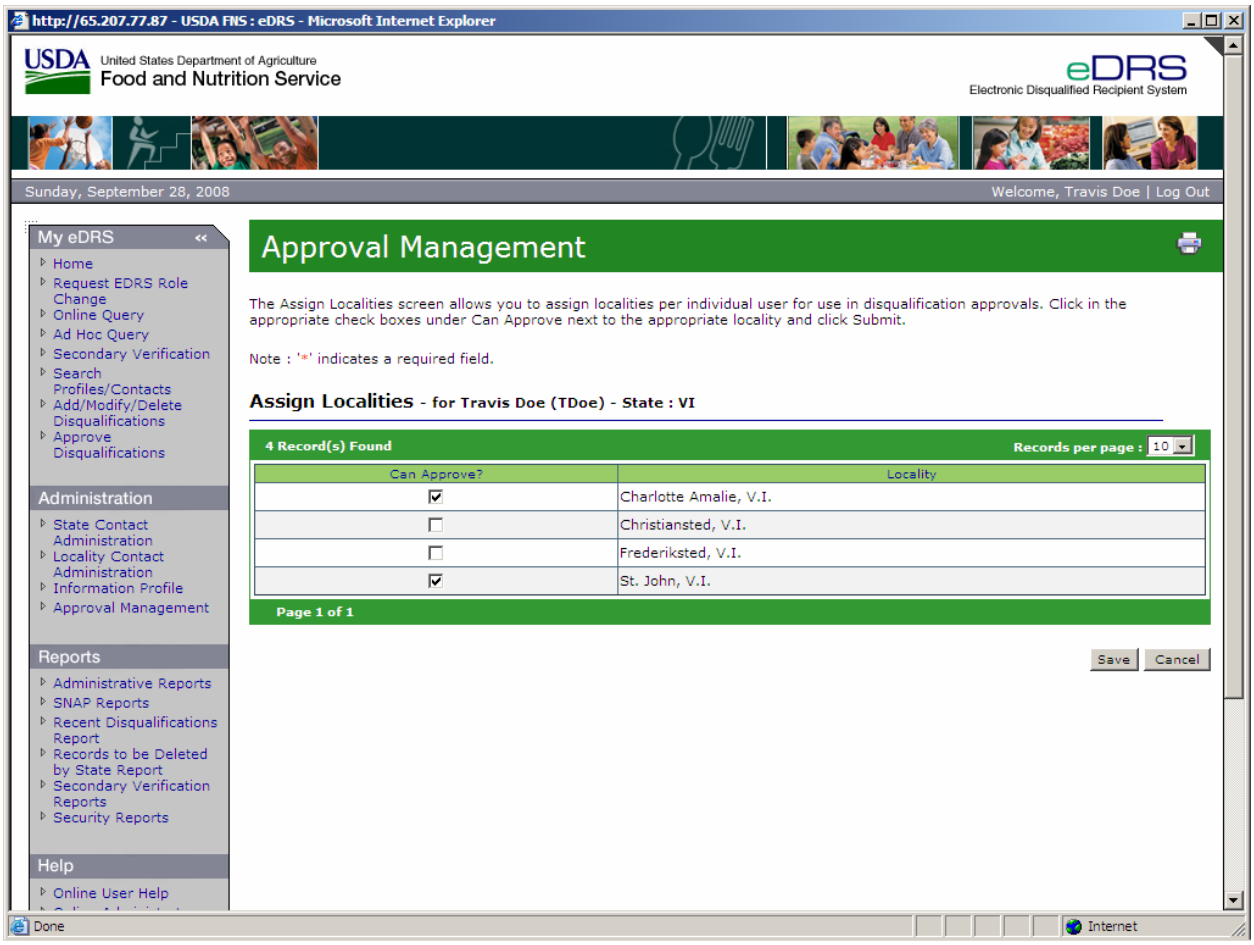
Note: While you are able to assign any user the ability to approve at the locality level, users must have been assigned the Disqualification Approver role to access disqualifications needing approval.

Figure 53. Approval Management, Assign Localities



6. To assign localities to the person, click the **Check Boxes** for each locality desired as shown in Figure 54.

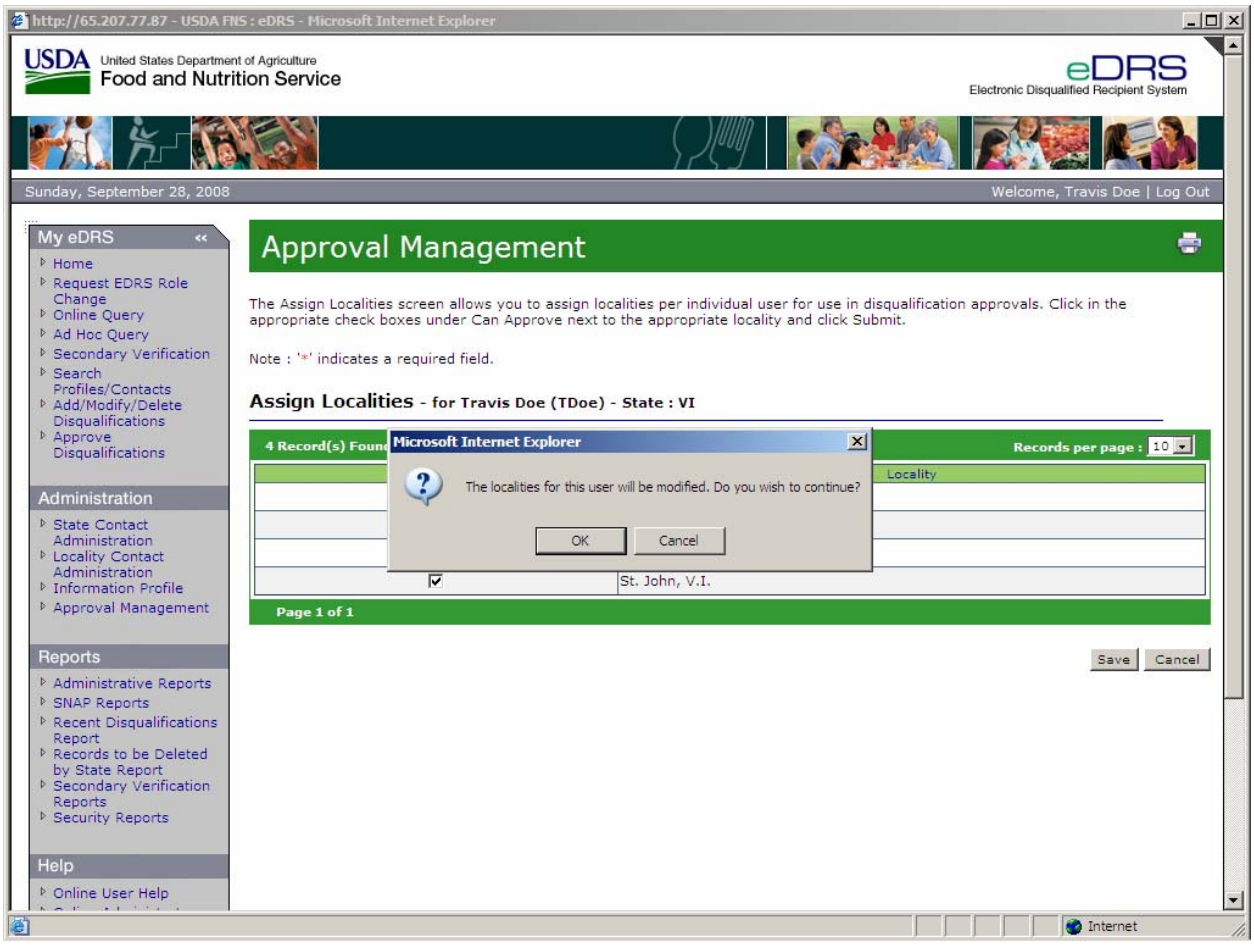
Figure 54. Approval Management, Select Localities Screen



7. When complete, click **Save.** A pop up box will appear asking: "The localities for this user will be modified. Do you wish to continue?" as shown in Figure 55.

Note: *This will only change locality information related to approving records. It does not change locality information associated with the user's account.*

Figure 55. Approval Management, Save Approval Assignment



8. Click **OK** to save and return to the Search Results screen. Click **Cancel** to return to the Assign Localities screen.

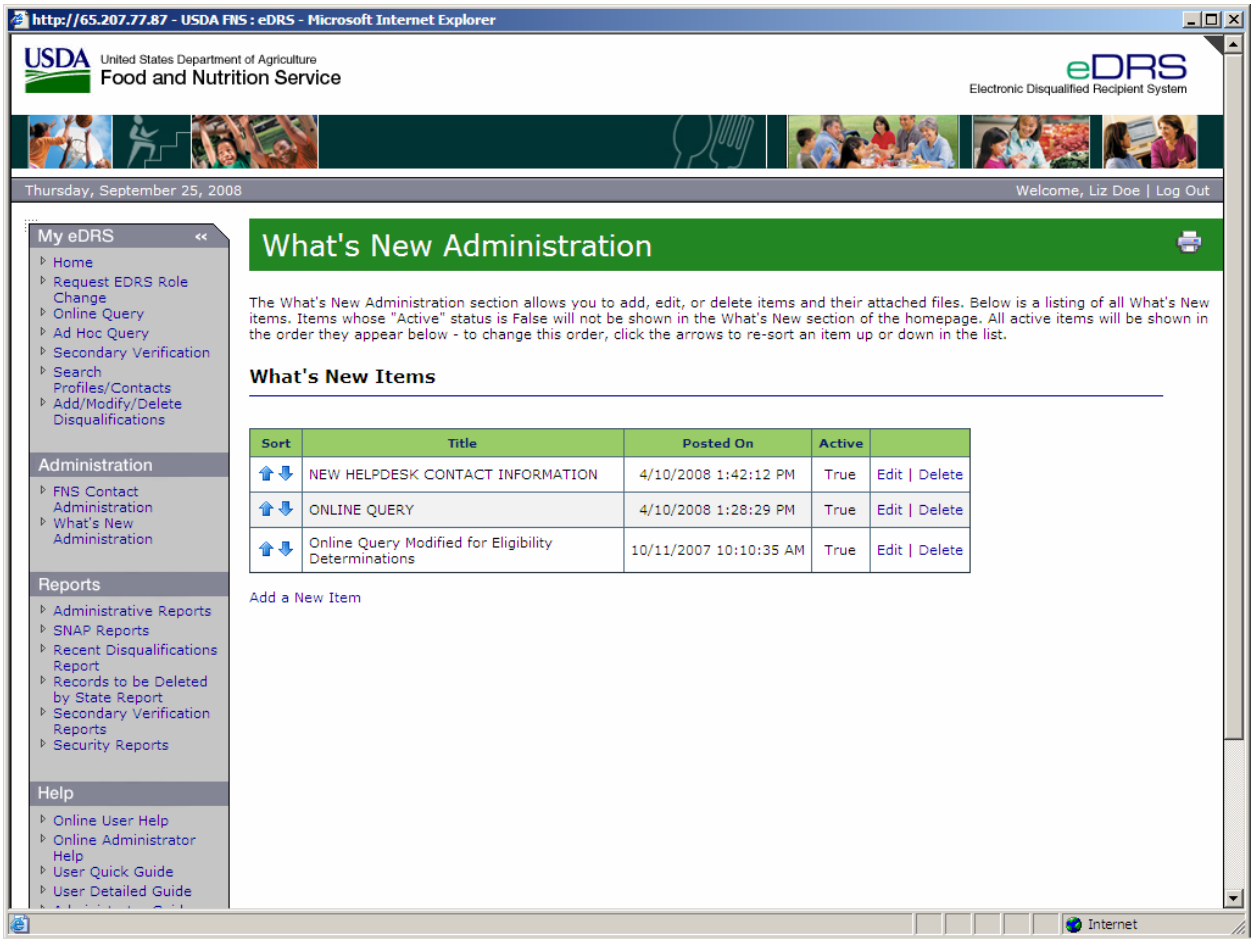
4.7 What's New

The What's New section, located on the lower right portion of the eDRS home page, is designed to communicate functionality updates, SNAP Policy updates or other useful information to eDRS users. This is a function of the National Coordinator. The eDRS National Coordinator will have the ability to attach documents that will be available to eDRS users in the What's New section.

To add new information in the What's New section:

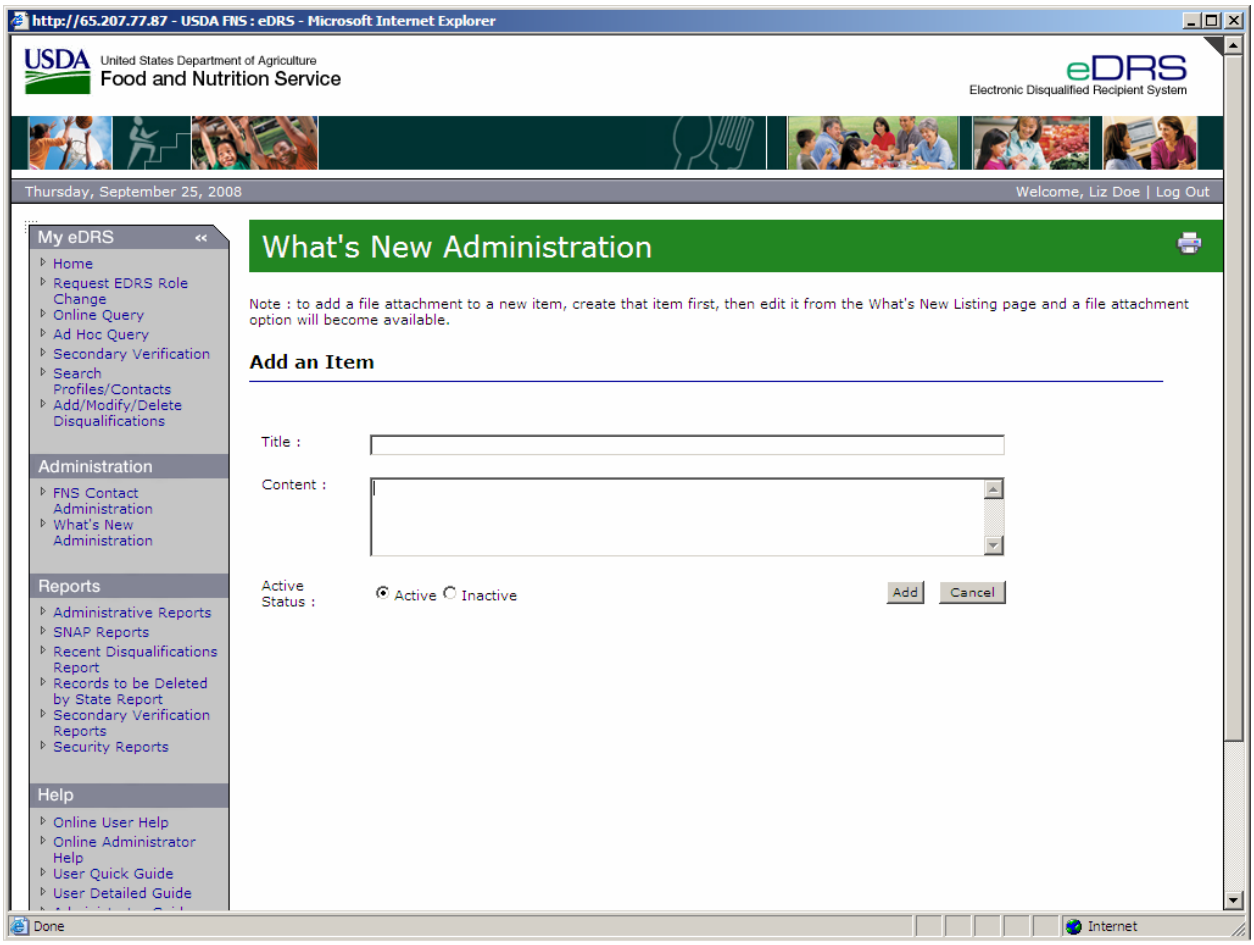
1. Click the **What's New Administration** link on the left menu bar under Administration to display the What's New Administration screen as shown in Figure 56.

Figure 56. What's New Administration Screen



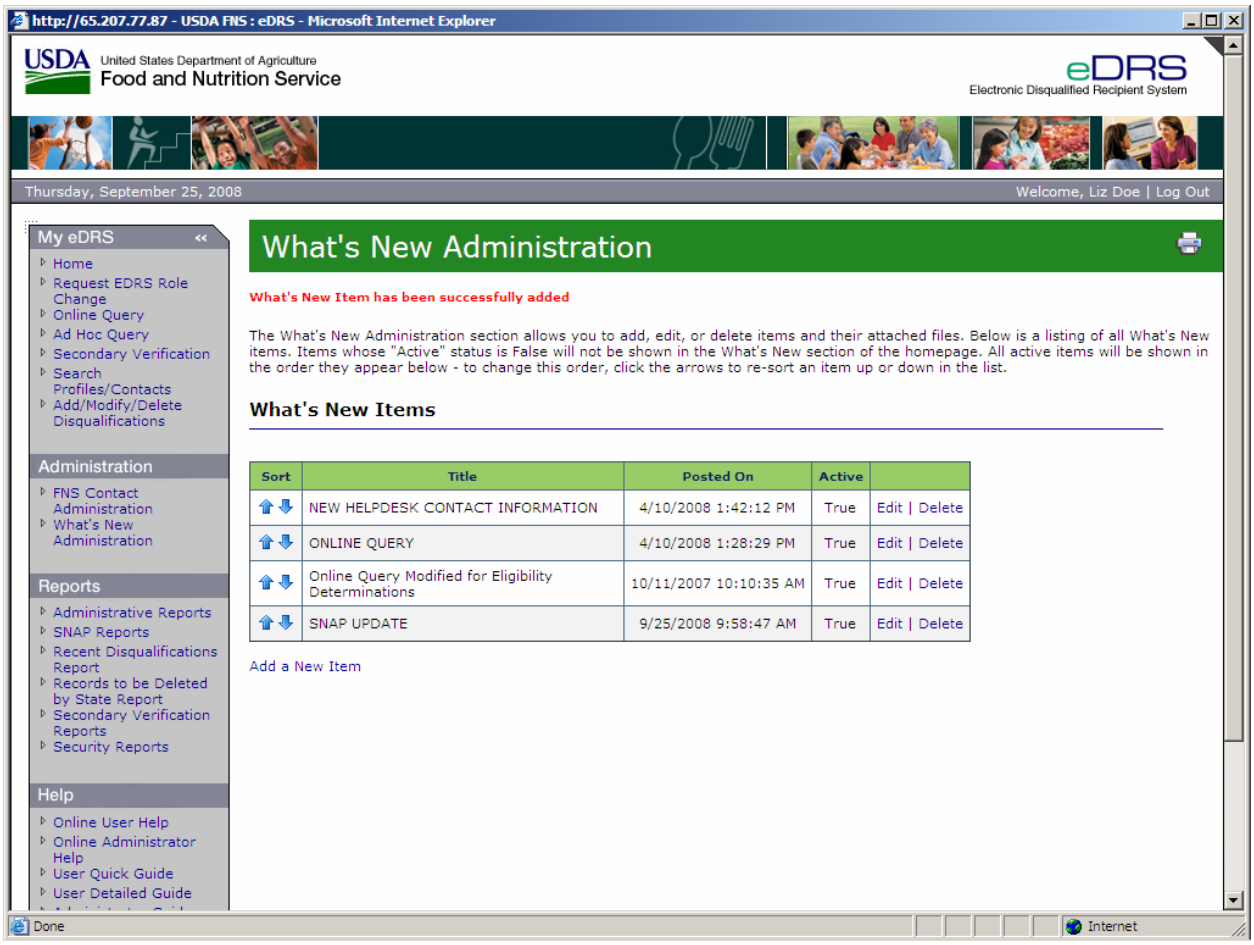
2. Click the **Add New Item** to display the What's New Content screen as shown in Figure 57.

Figure 57. What's New Administration, Content Screen



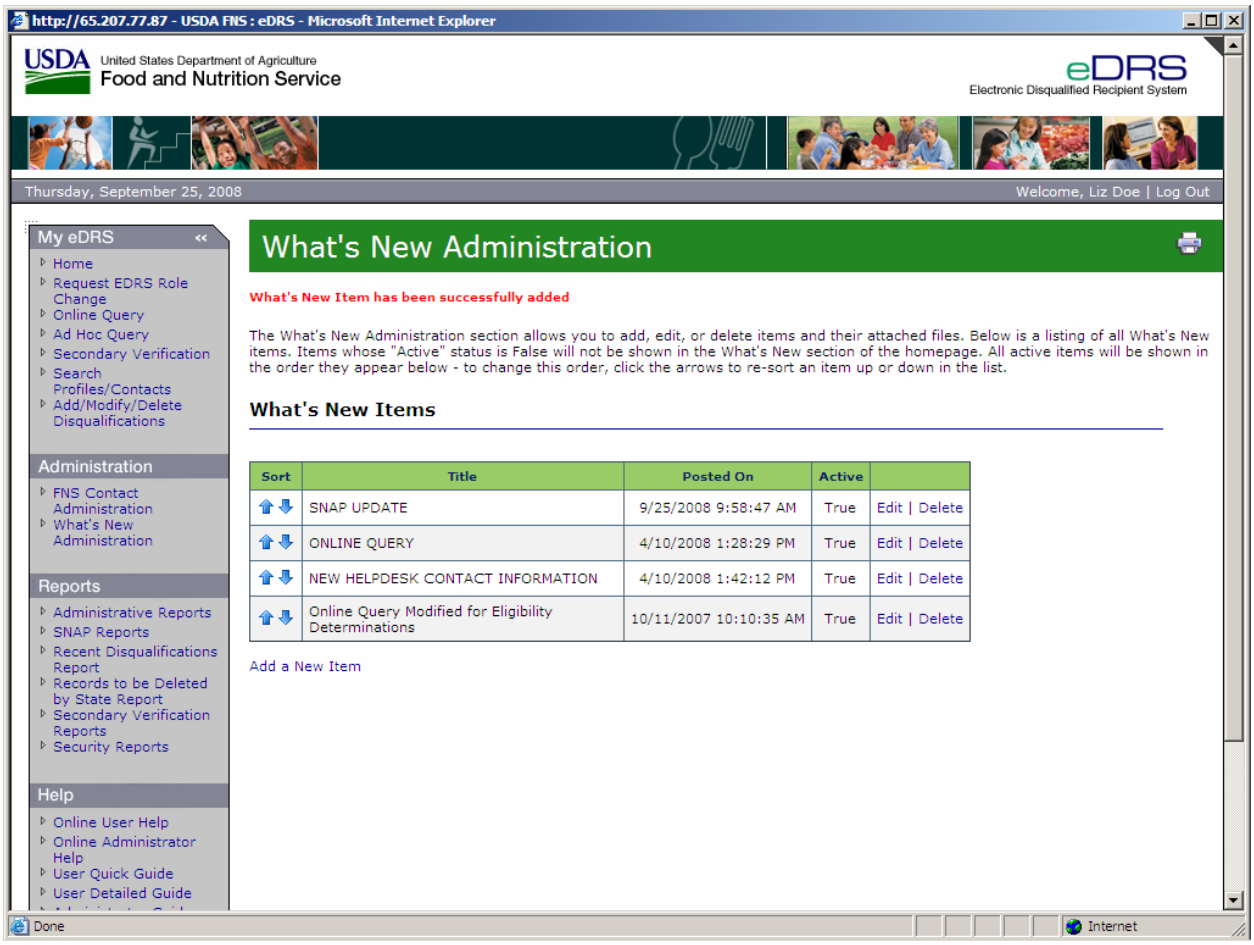
3. Enter a title into the title field.
4. Enter the content you wish displayed in the What's New section into the content field. The tool bar above the content field allows you to format the text in a manner similar to most word processing software. You may also enter a hyperlink in the text by clicking the "Create Link" icon.
5. If you want this content displayed immediately, next to Active Status, select **Active.** Select **Inactive** if you want the content to be stored in the system, but not visible to users.
6. Click **Add** to display the What's New Administration screen as shown in Figure 58. The title of the new item will appear at the bottom of the list and it will say TRUE if it is Active and visible to users, FALSE if it is not active and not visible to users.

Figure 58. What's New Administration Screen



7. The order of the list determines the order content will be displayed in the What's New section of the home page. To move a content item up or down, click the **arrow** in the Sort column to move the item up or down one level as shown in Figure 59. Repeat until the items are in the correct order.

Figure 59. What's New Administration, Change Order Screen



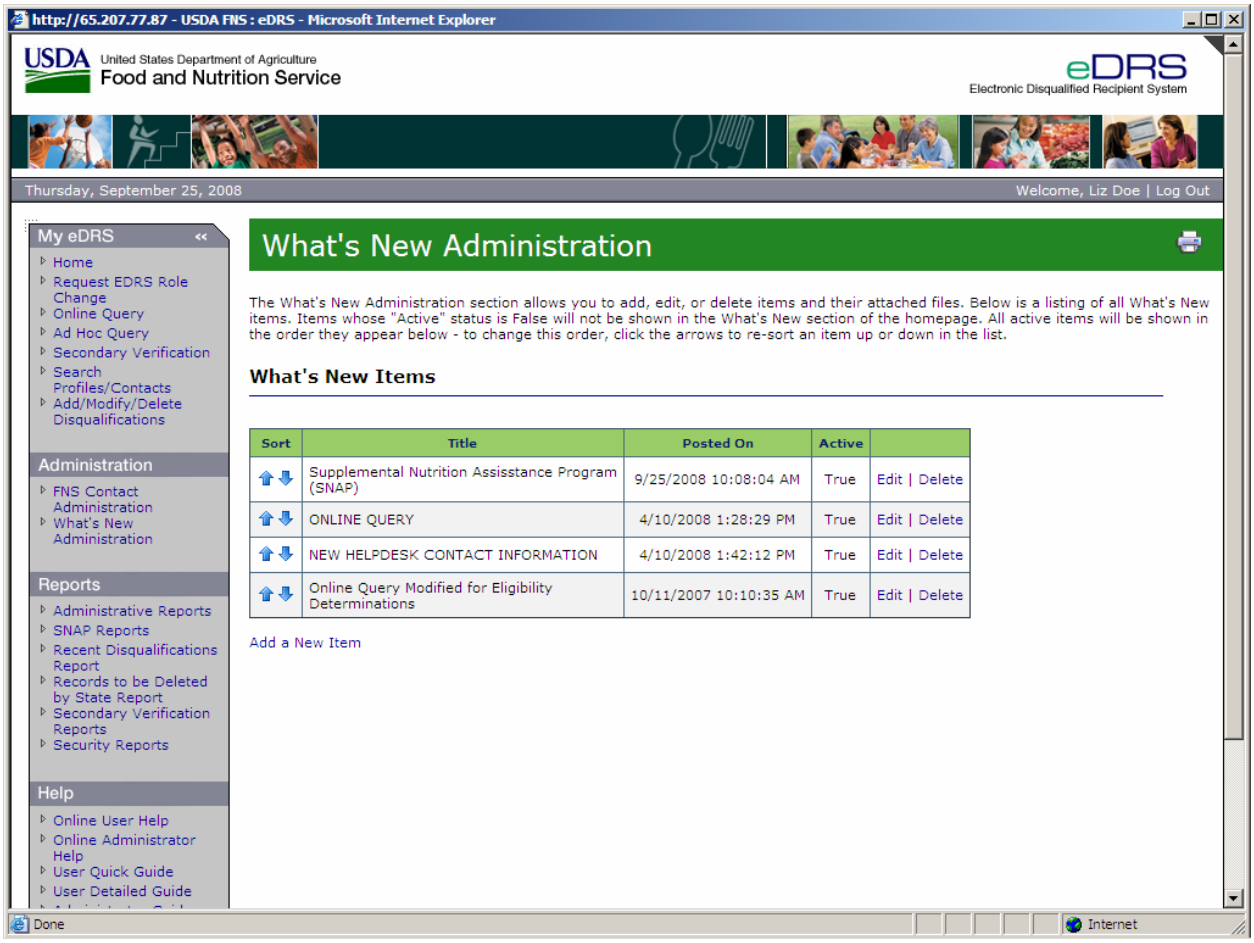
8. Click on the **Home** link in the menu bar to view the new posting on the eDRS home page.

Note: More than one item can be active and visible in the What's New section at any time.

To add or edit an attachment for the What's New section:

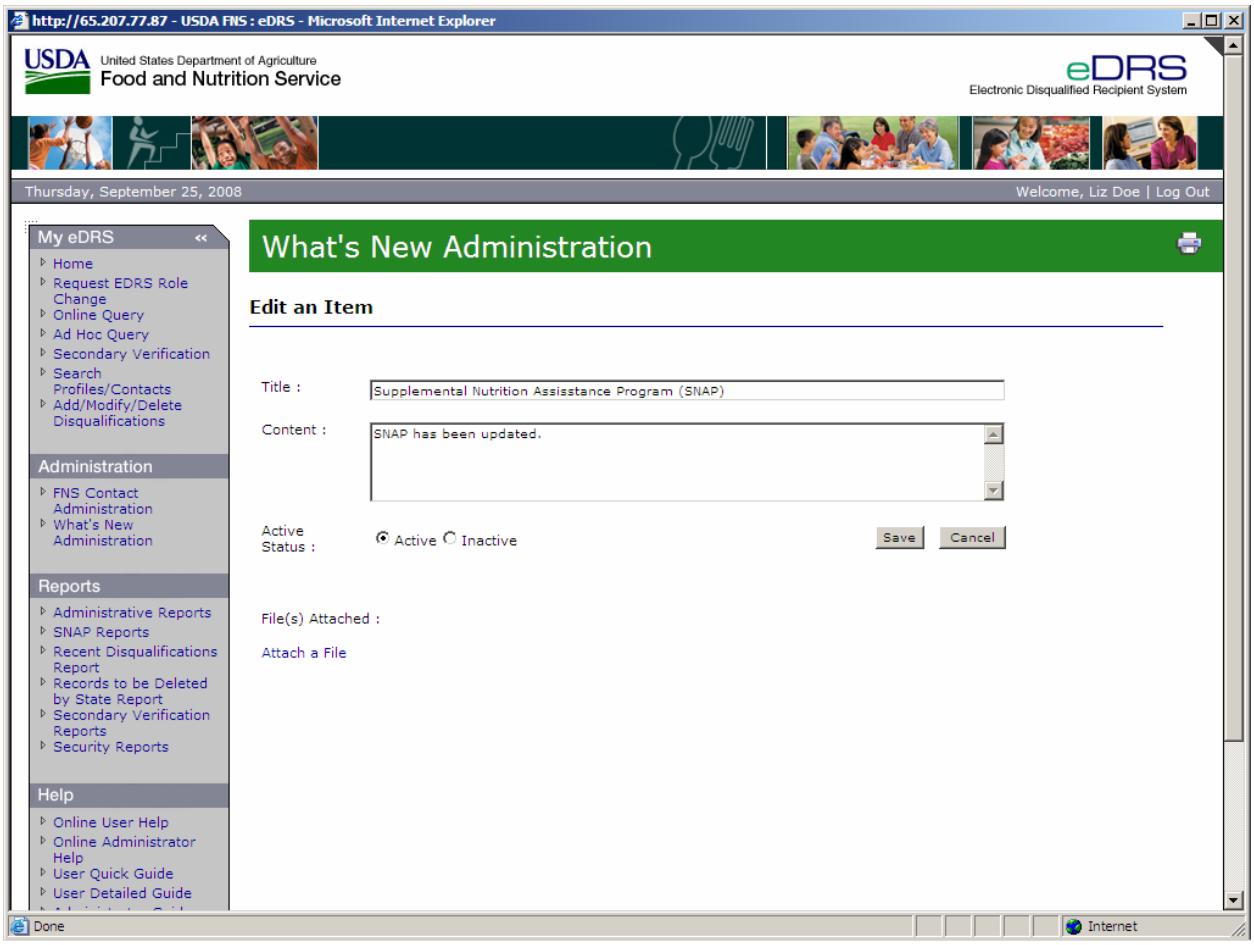
1. Click on the **What's New Administration** link on the left menu bar under Administration to display the What's New Administration screen as shown in Figure 60.

Figure 60. What's New Administration Screen



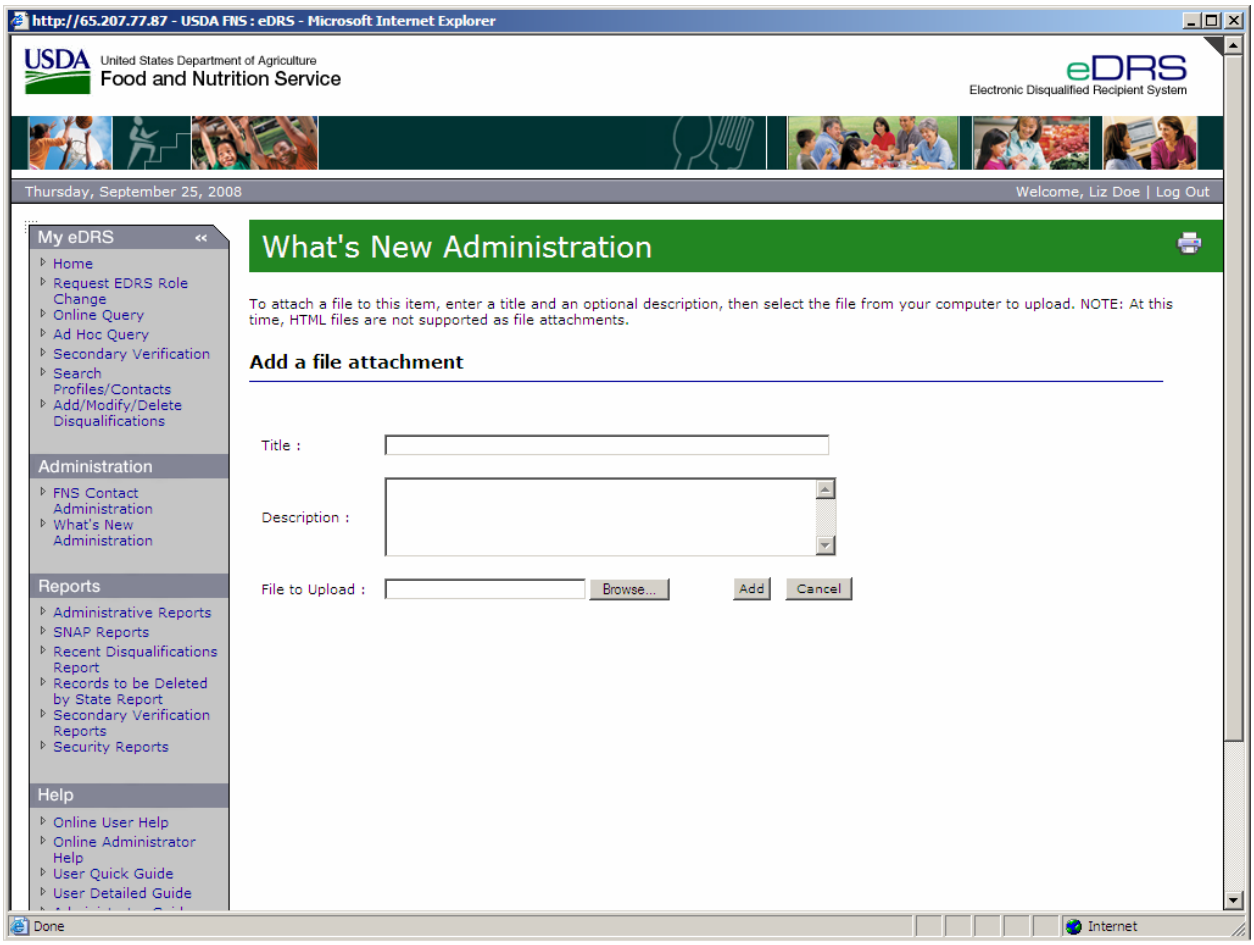
2. Click the **Edit** link next to the title of the content you wish to add an attachment to display the What's New Content screen as shown in Figure 61.

Figure 61. What's New Administration, Content Screen



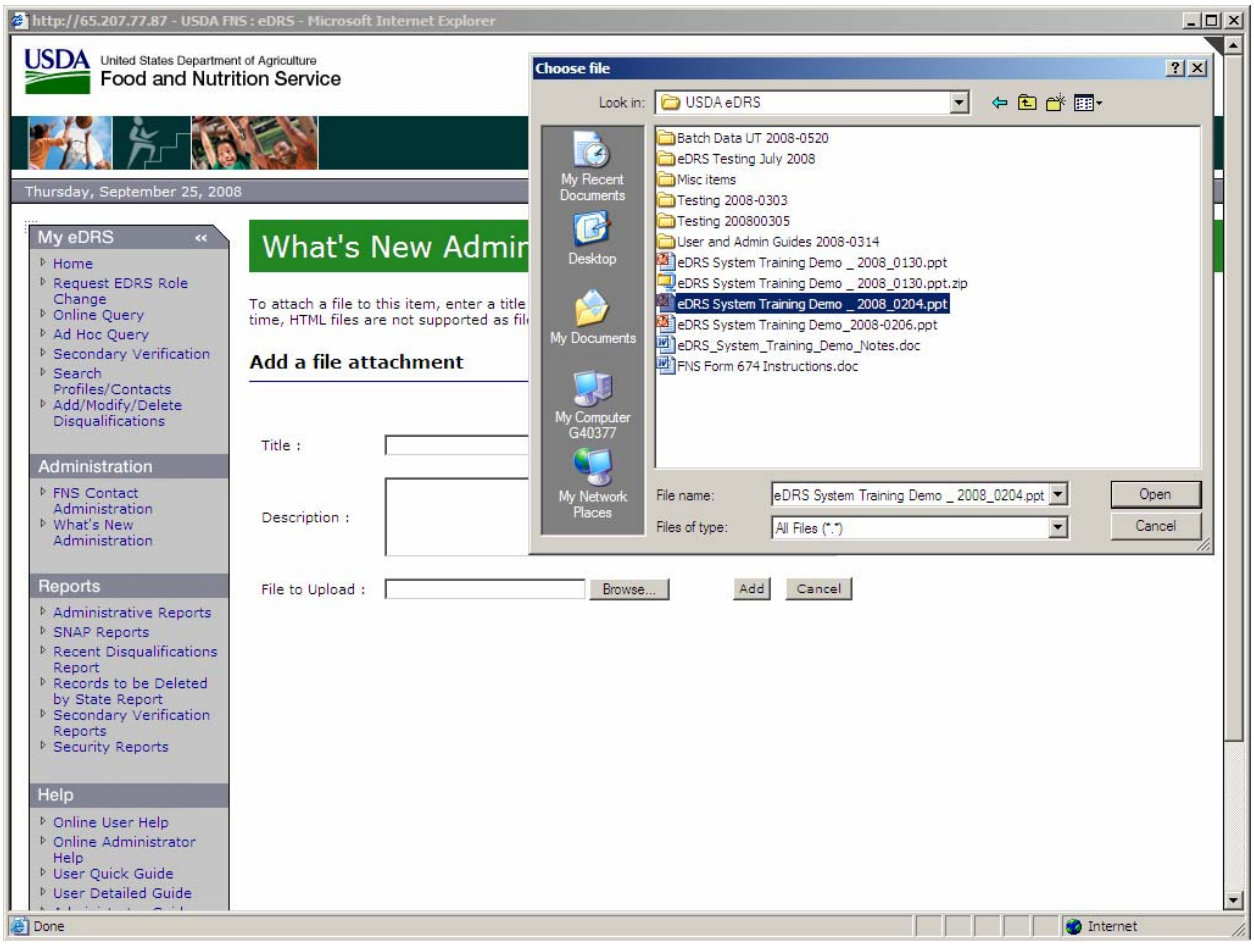
3. To add an attachment, Click **Attach a File** under "File(s) Attached" to display the File Description screen as shown in Figure 62.

Figure 62. What's New Administration, File Description Screen



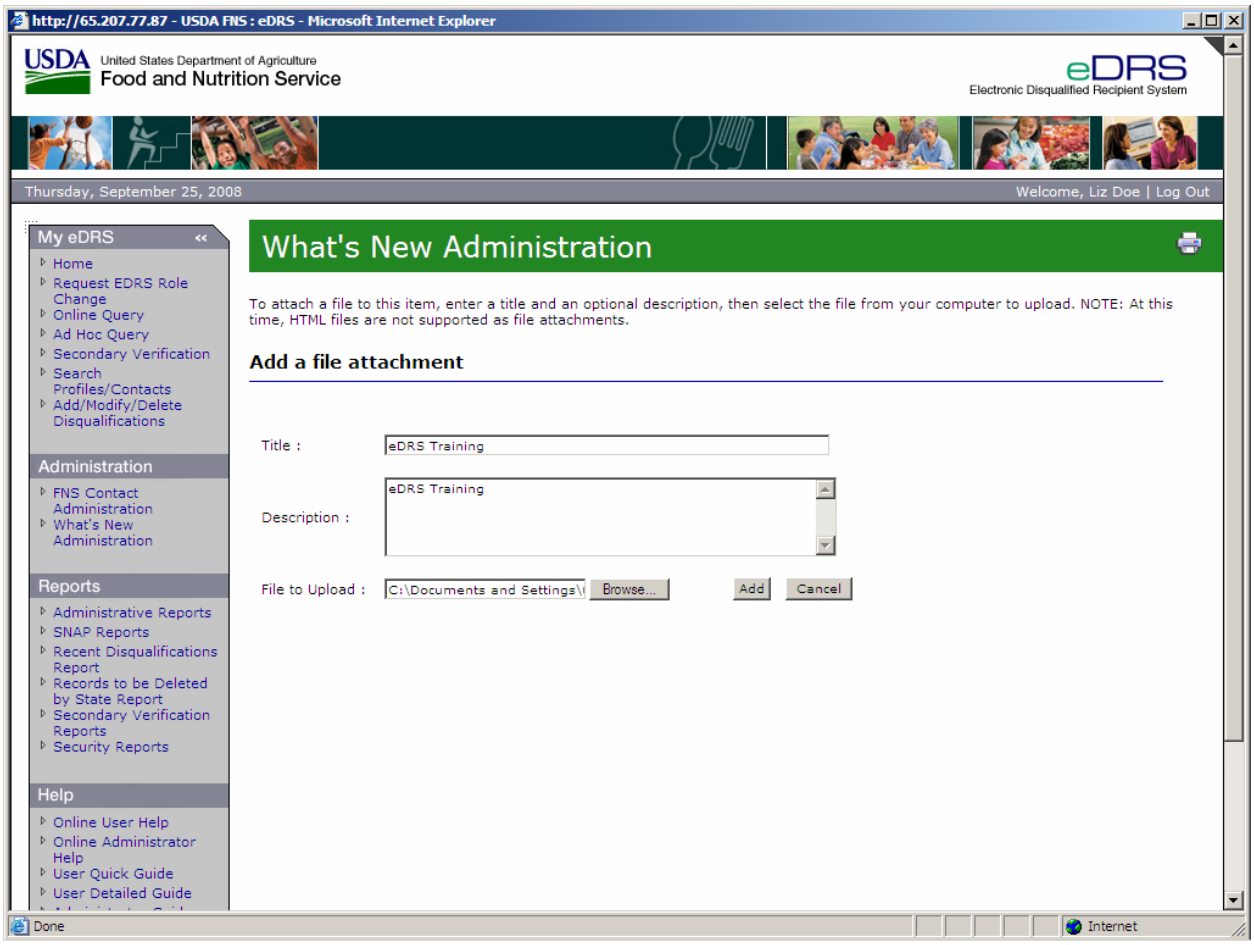
4. Enter a title for the document in the field provided. The title entered will be visible to users.
5. Enter a description for the document in the field provided.
6. If you know the file name and extension, enter it into the **File to Upload** field. If you do not know the filename and wish to search for it, click **Browse** to navigate to and select the file you wish to attach from your computer as shown in Figure 63**.**

Figure 63. What's New Administration, Attach File Screen



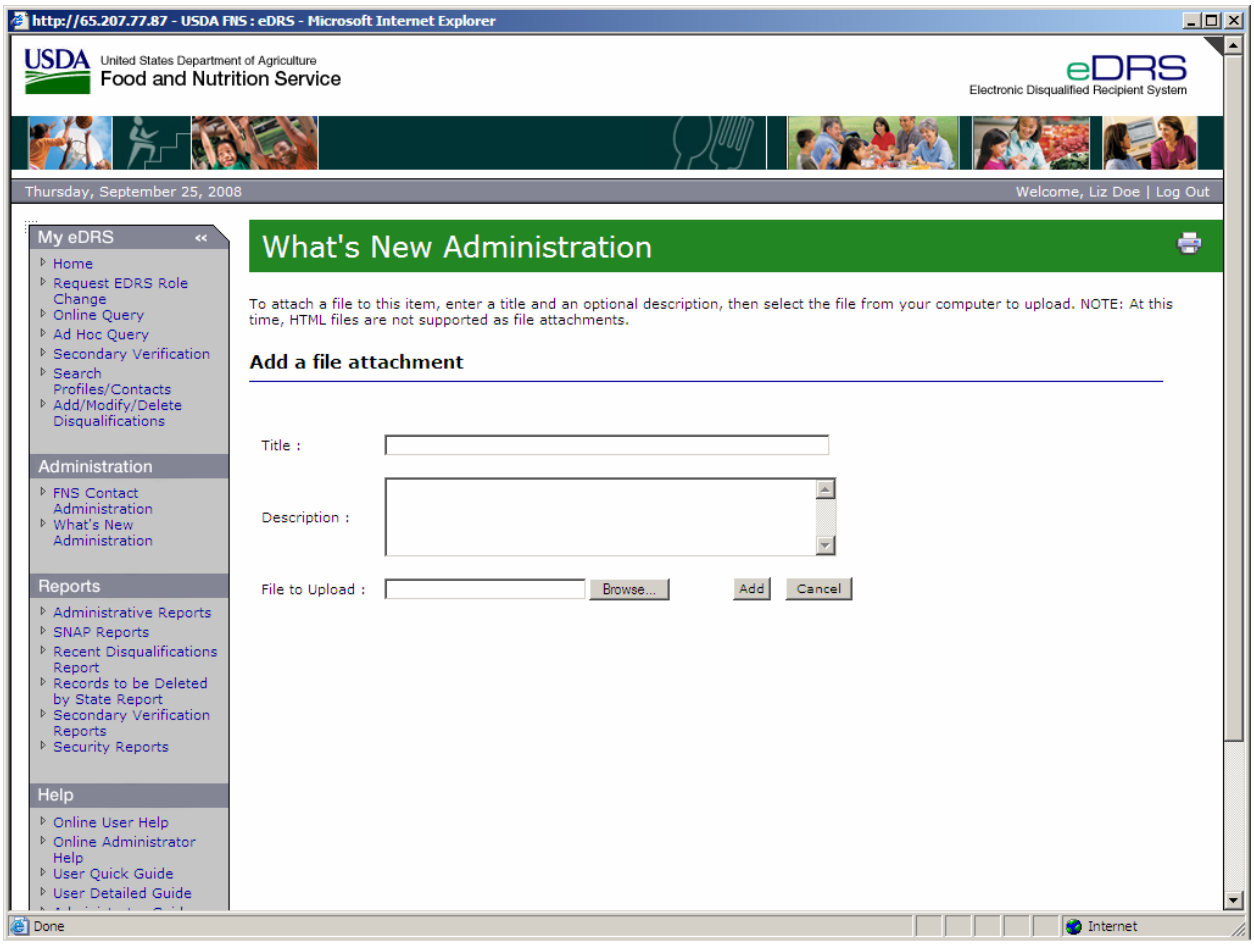
7. Click **Open** to display the File Description screen as shown in Figure 64.

Figure 64. What's New Administration, Attach File Screen (2)



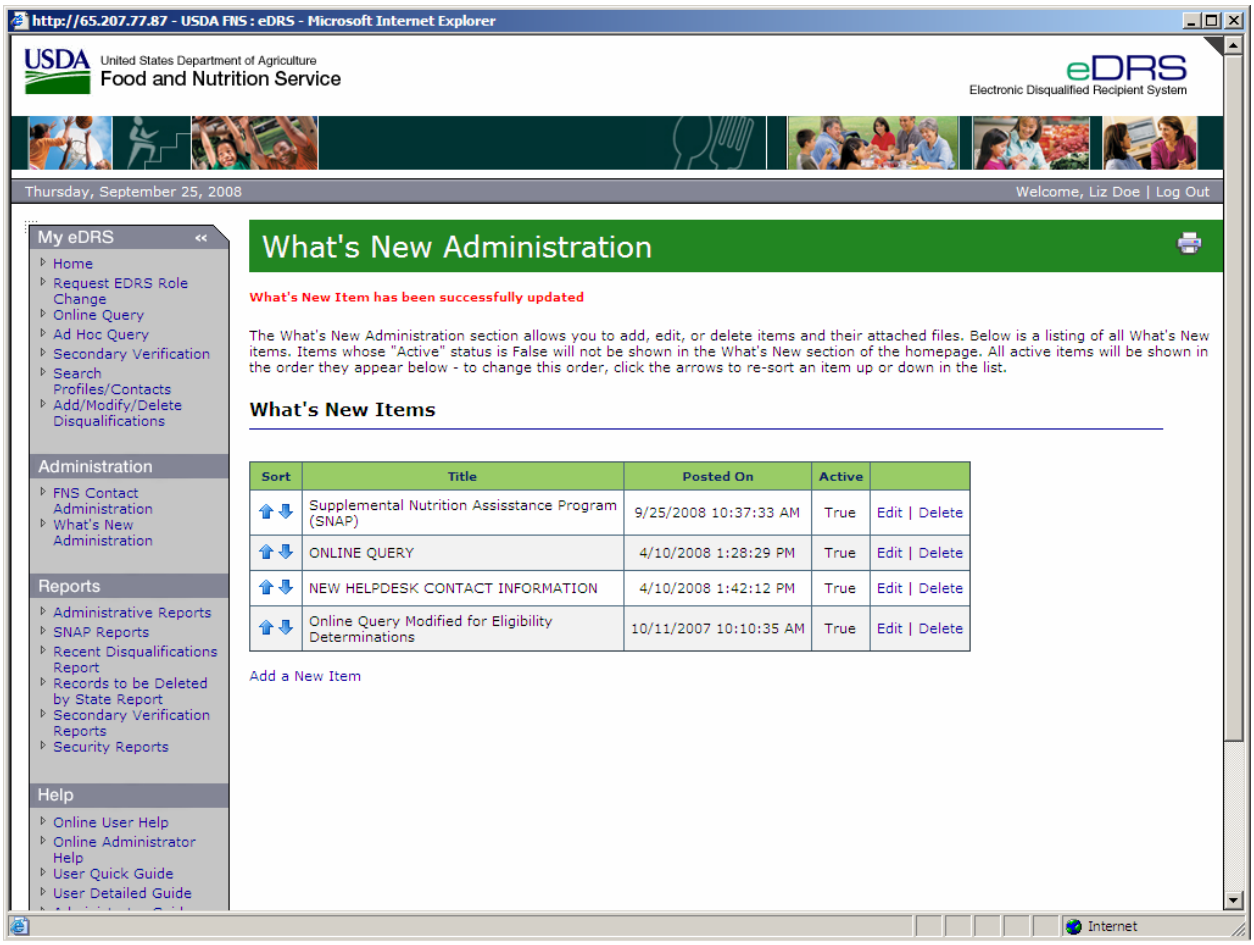
8. Click **Add** to display to the What's New Content screen, as shown in Figure 65. Notice that the file attached is listed under "File(s) Attached."

Figure 65. What's New Administration, Content Screen



9. To edit an attachment, click **Edit** next to the file you wish to edit. Complete Steps 4 and 5 above, and click **Save** to return to the What's New Administration Screen.
10. Click **Save** in the Content Description Screen to save the changes and display the What's New Administration Screen as shown in Figure 66. If your content is active, the attachment is now visible to users in the What's New section.

Figure 66. What's New Administration Screen

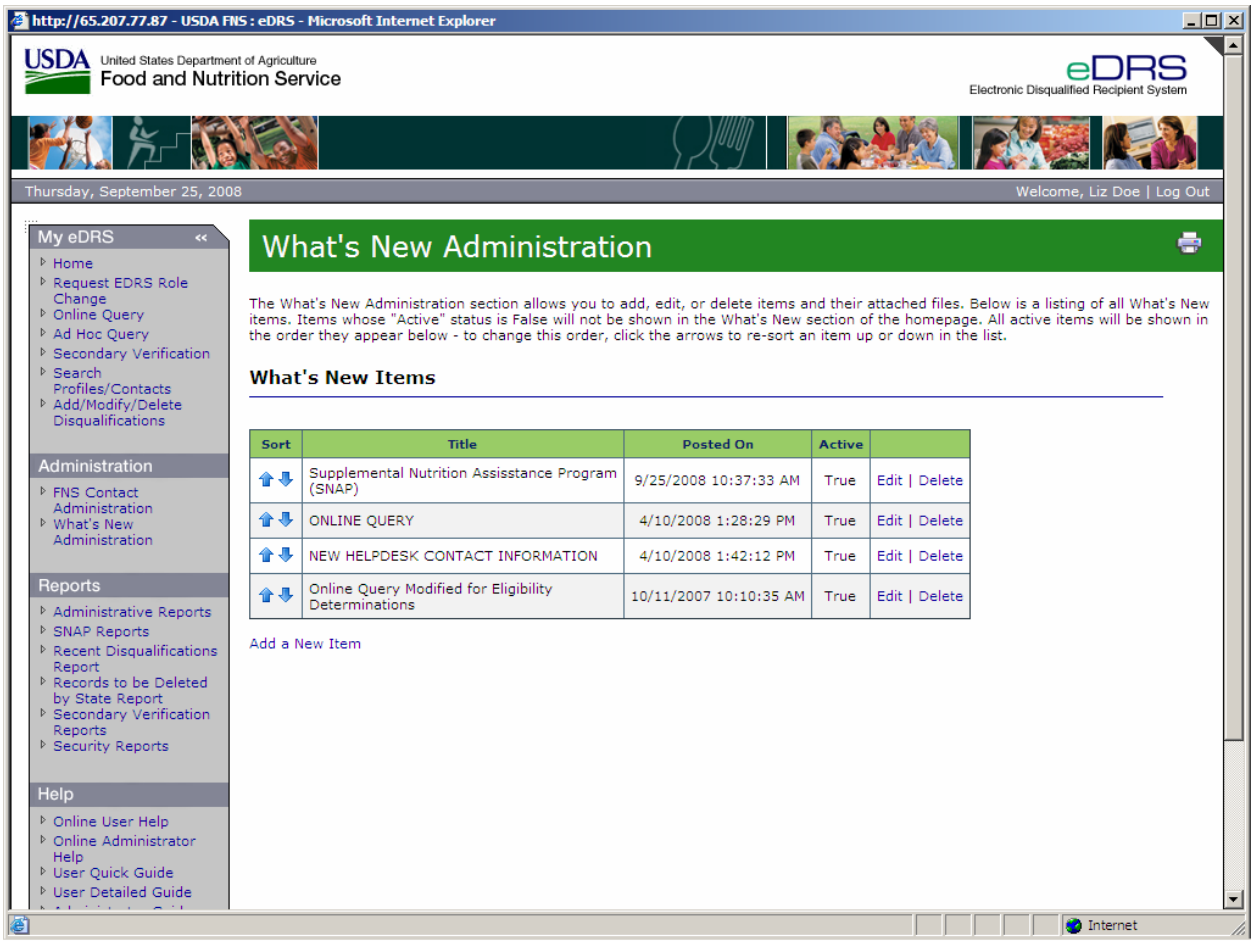


11. Click on **Home** link on the left menu bar to view the updated What's New section on the eDRS home page.

To delete or edit content in the What's New section:

1. Click on the **What's New Administration** link on the left menu bar under Administration to display the What's New Administration screen as shown in Figure 67.

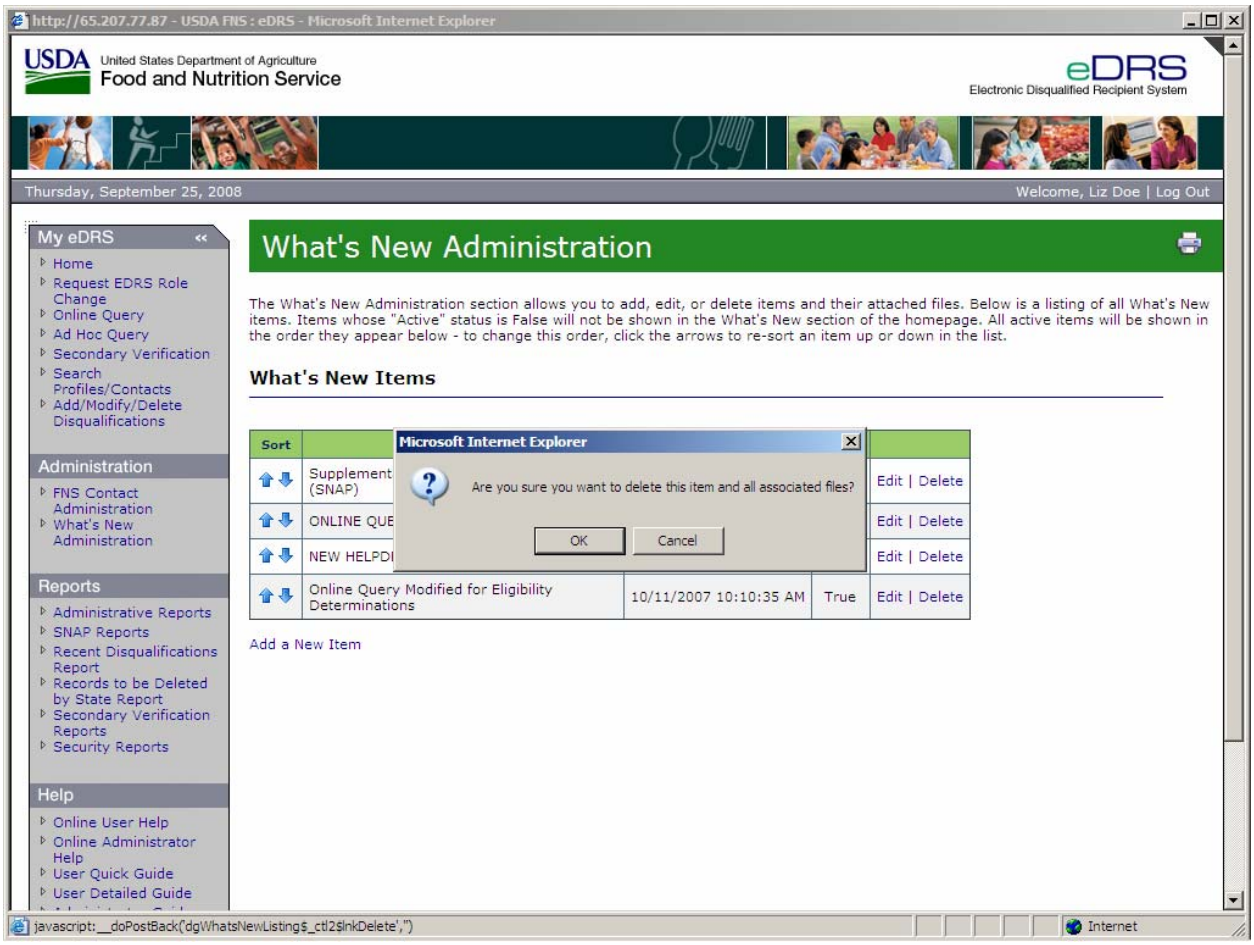
Figure 67. What's New Administration Screen



2. To delete content, click **Delete** next to the content item you wish to delete. A box will appear asking: "Are you sure you want to delete this item and all associated files?" as shown in Figure 68.

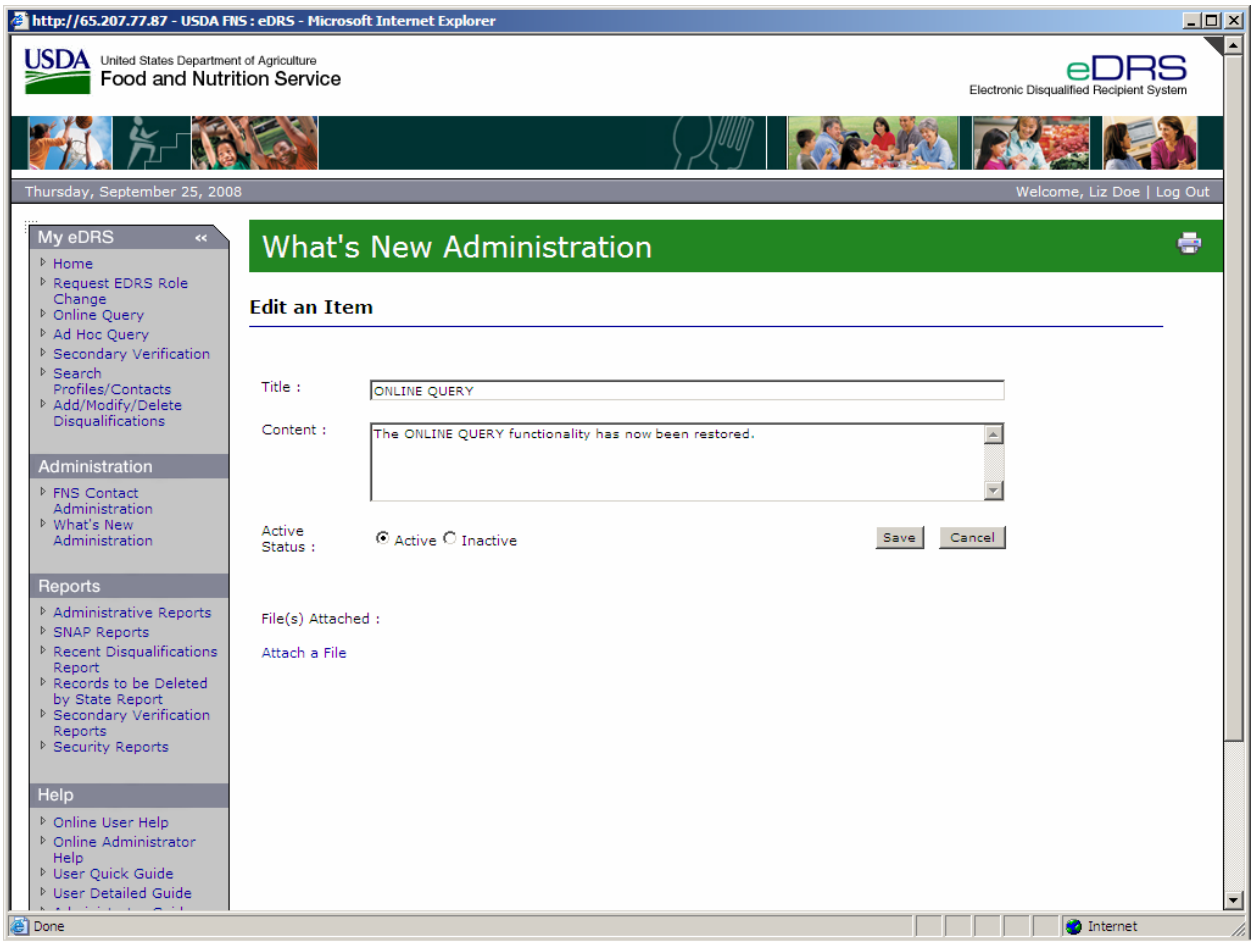
Note: This will delete the item from the system. If you wish only to remove content from a user's view, change the active state to "false" by way of the edit content screen.

Figure 68. What's New Administration, Delete Content Screen



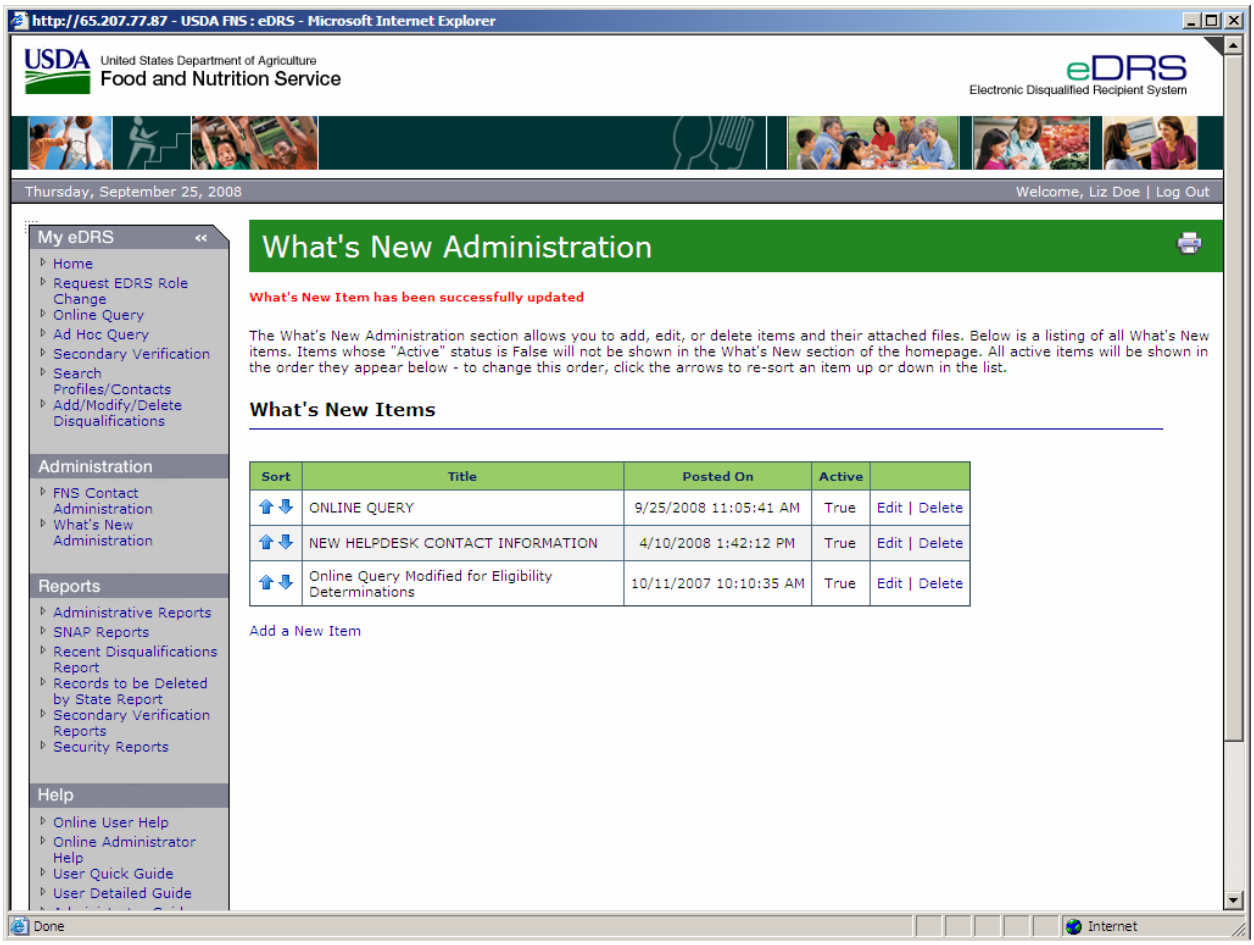
3. Select **OK** to delete the content. Select **Cancel** to cancel.
4. To edit content in the What's New section, click the **Edit** link next to the title of the content you wish to edit or update an attachment to display the What's New Content screen as shown in Figure 69.

Figure 69. What's New Administration, Edit Content Screen



5. Edit the title in the title field as necessary.
6. Edit the content in the content field as necessary.
7. If you want this content displayed immediately, next to Active Status, select **Active.** Select **Inactive** if you want the content to be stored in the system, but not visible to users.
8. Click **Save** to save the changes and view the What's New Administration screen as shown in Figure 70.

Figure 70. What's New Administration Screen

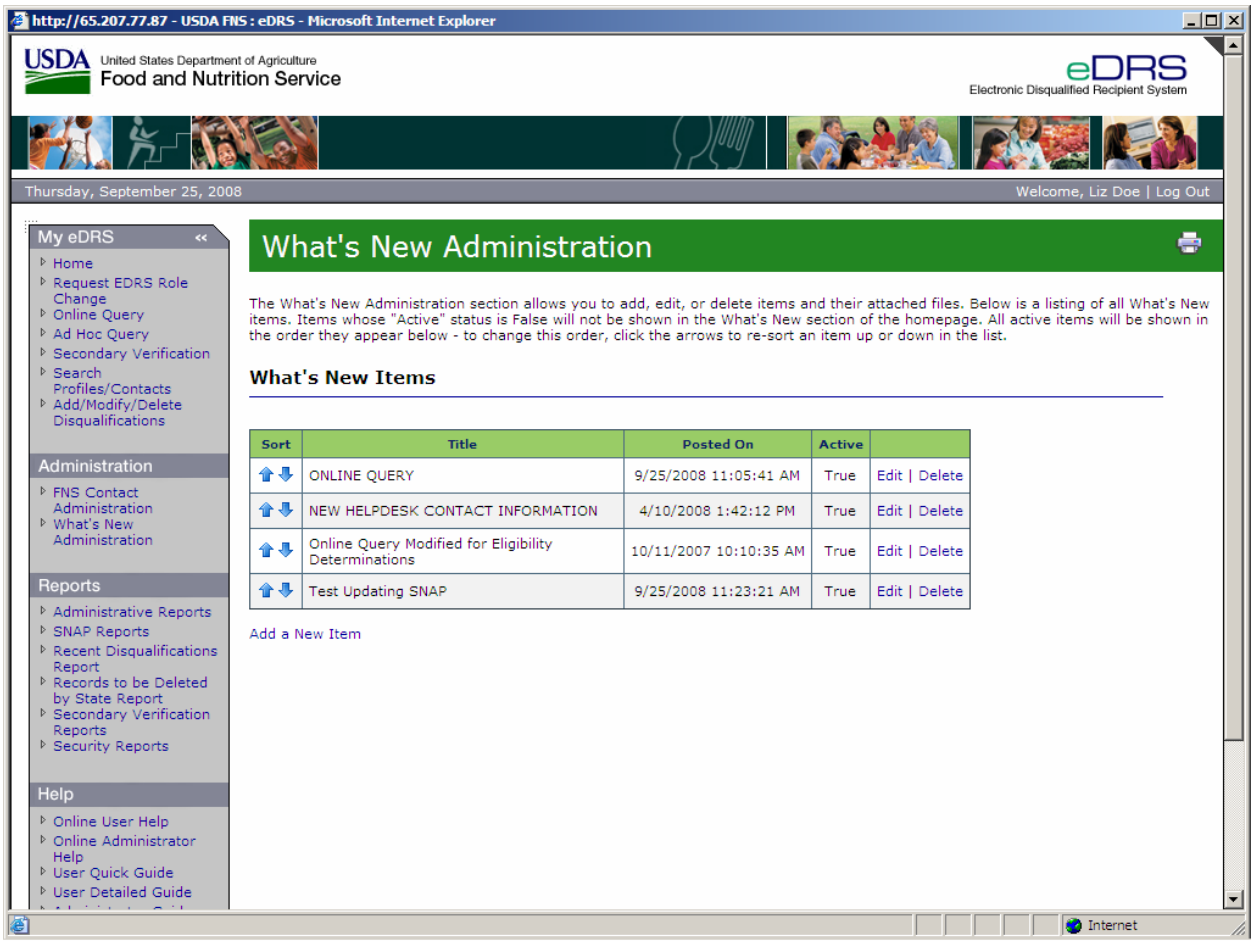


9. If the content is set to active, the changes are now visible to users in the What's New section.
10. Click on the **Home** link on the left menu bar to view your changes on the eDRS home page.

To delete an attachment from a What's New content item:

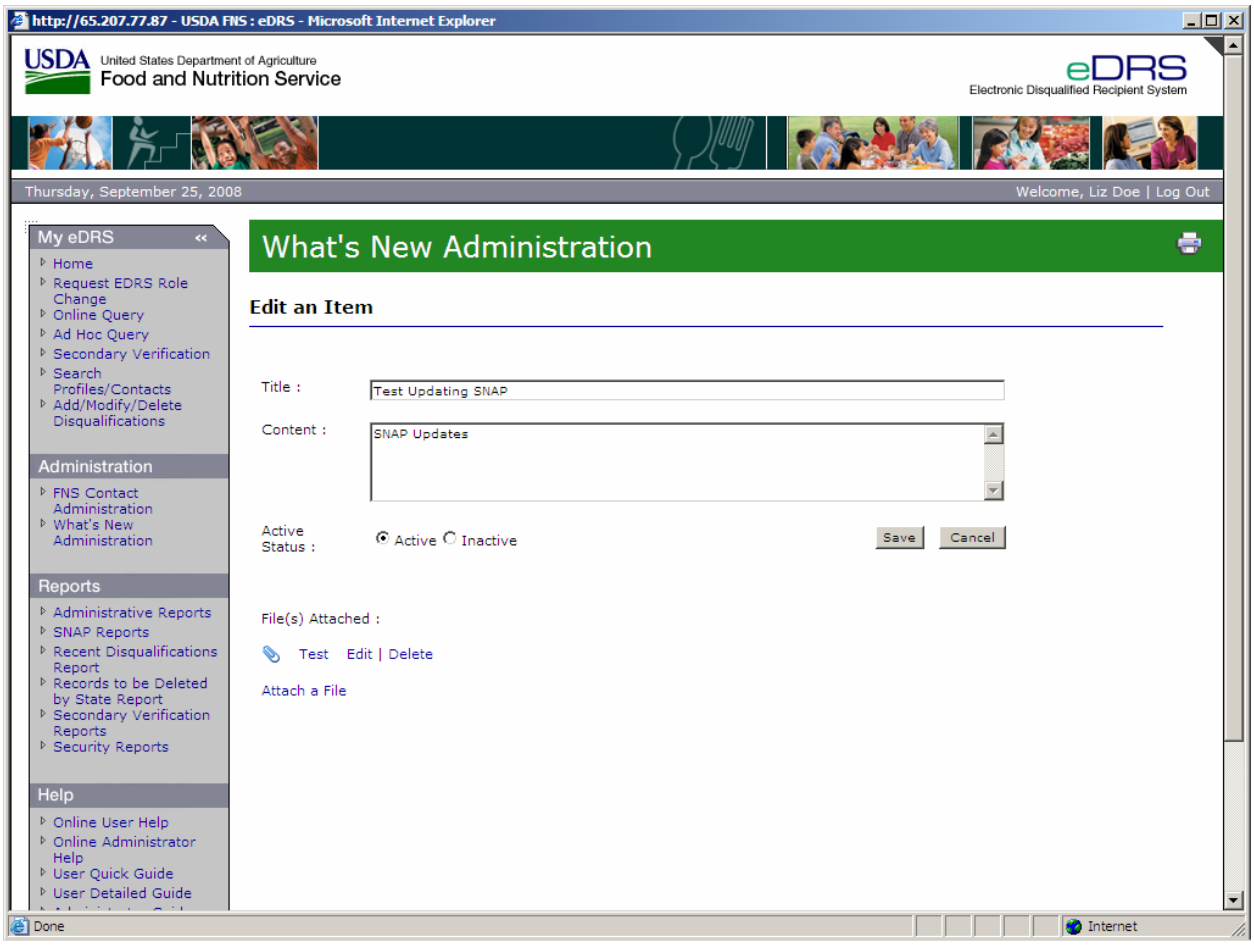
1. Click on the **What's New Administration** link on the left menu bar under Administration to display the What's New Administration screen as shown in Figure 71.

Figure 71. What's New Administration Screen



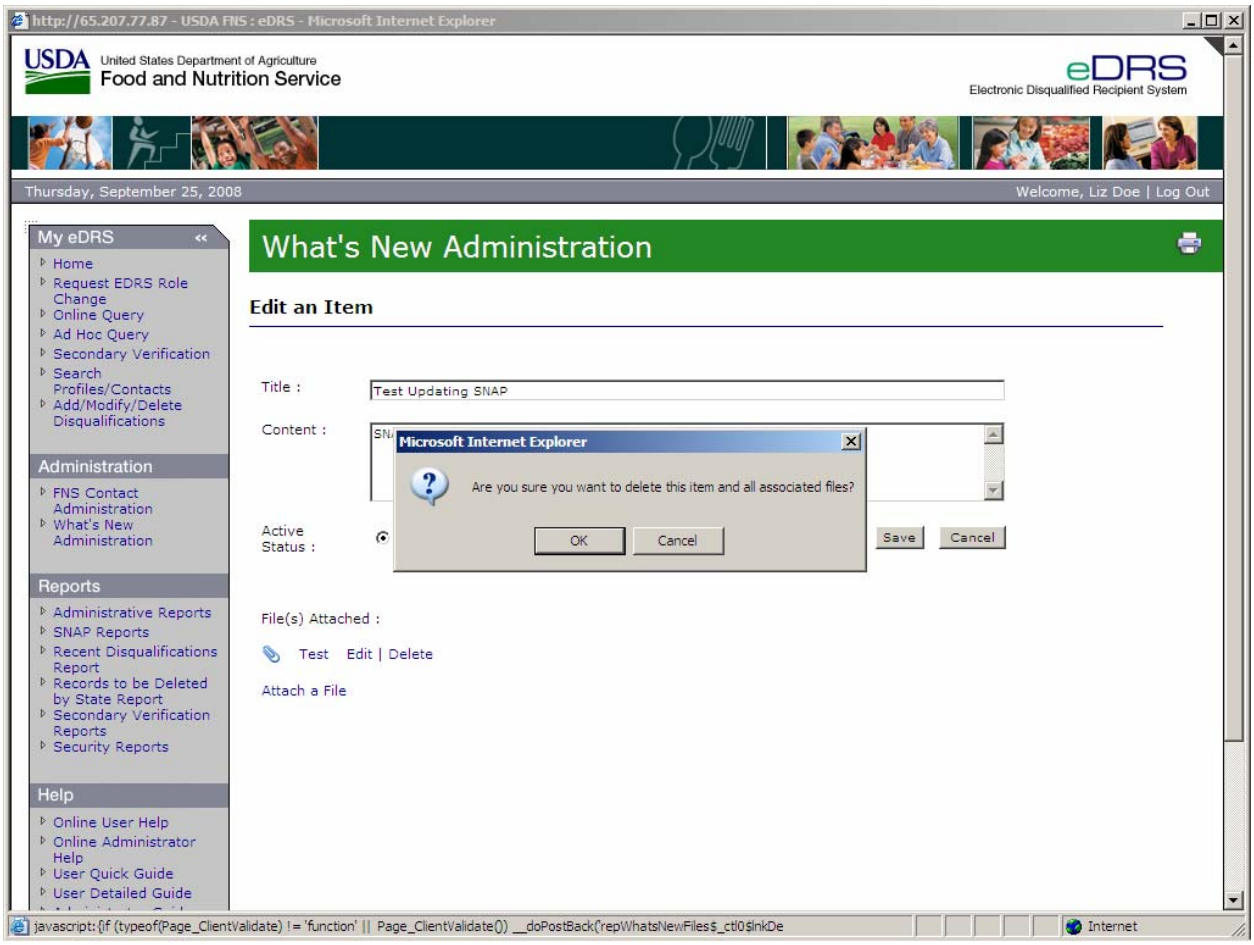
2. Click the **Edit** link next to the title of the content you wish to delete an attachment to display the What's New Content screen as shown in Figure 72.

Figure 72. What's New Administration, Content Screen



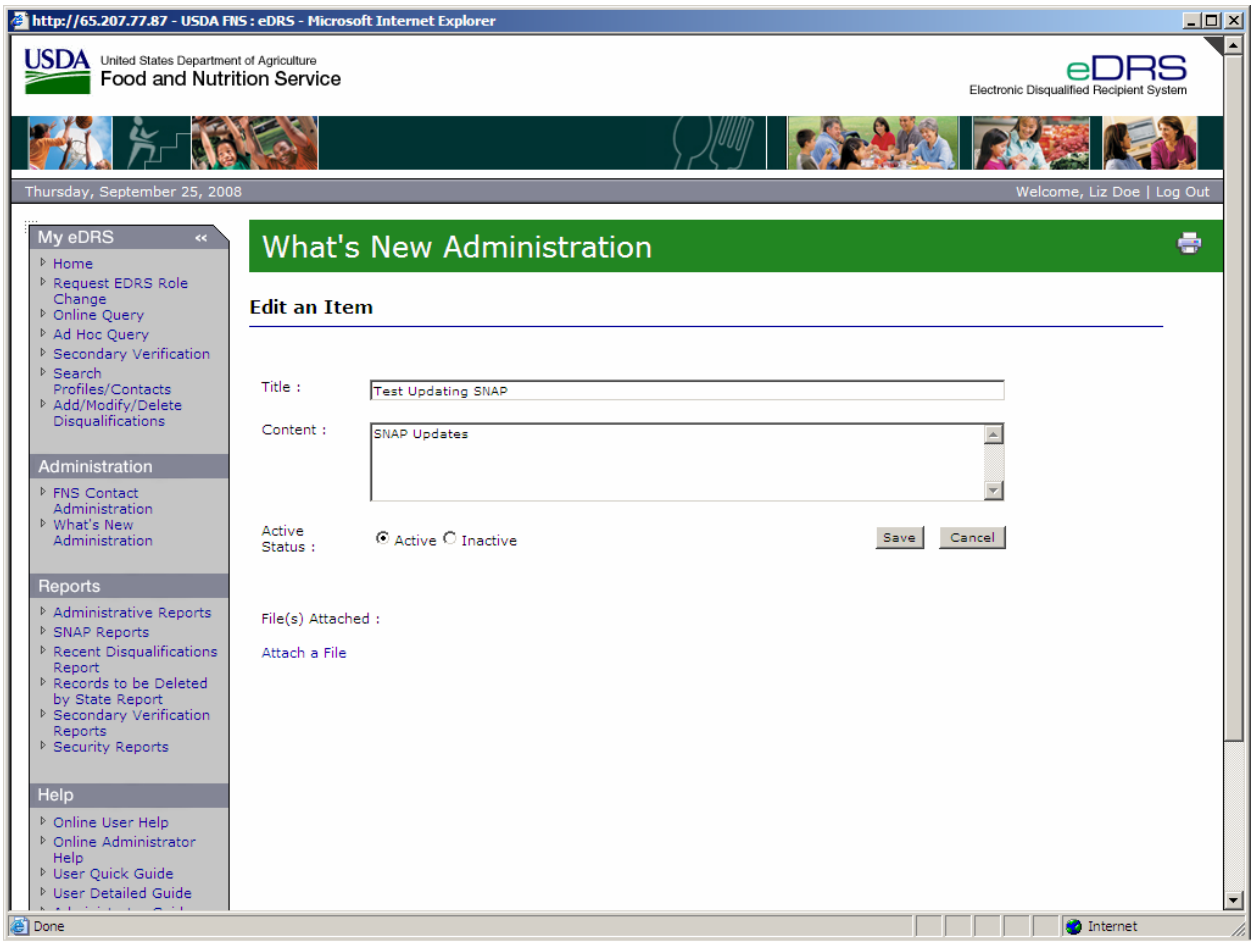
3. Under "File(s) Attached," next to the attached file you wish to delete click **Delete**. A box will appear asking: "Are you sure you want to delete this item and all associated files?" as shown in Figure 73.

Figure 73. What's New Administration, Delete Attachment Screen



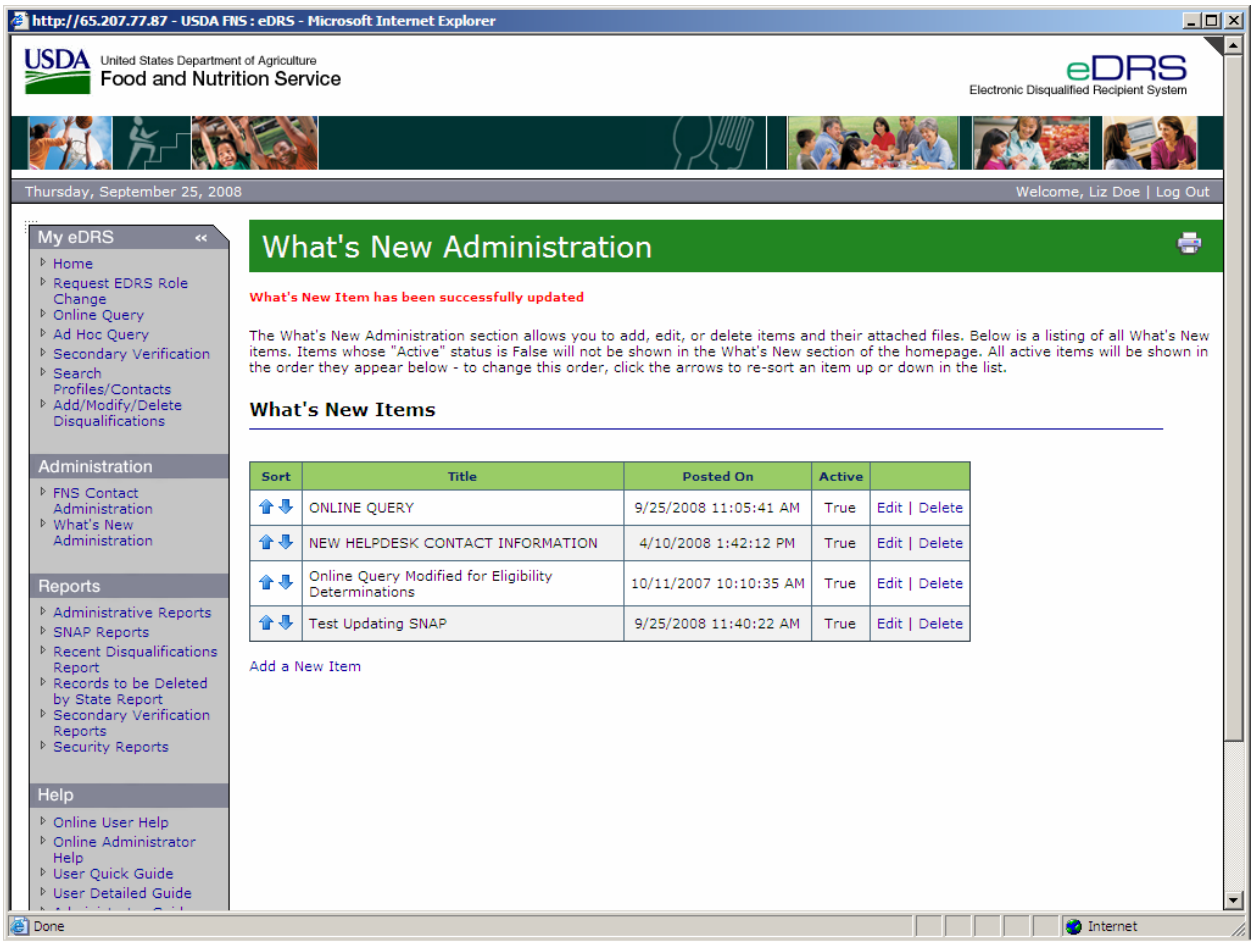
4. Click OK to delete the file. Click **Cancel** to cancel.
5. As shown in Figure 74 the Edit Content screen appears. Notice the file is no longer attached.

Figure 74. What's New Administration, Content Screen



6. Click **Save** to return to the What's New Administration screen as shown in Figure 75.

Figure 75. What's New Administration Screen



7. Click **Home** on the left menu bar to view the updated posting on the eDRS home page.

5 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 National Coordinator 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.

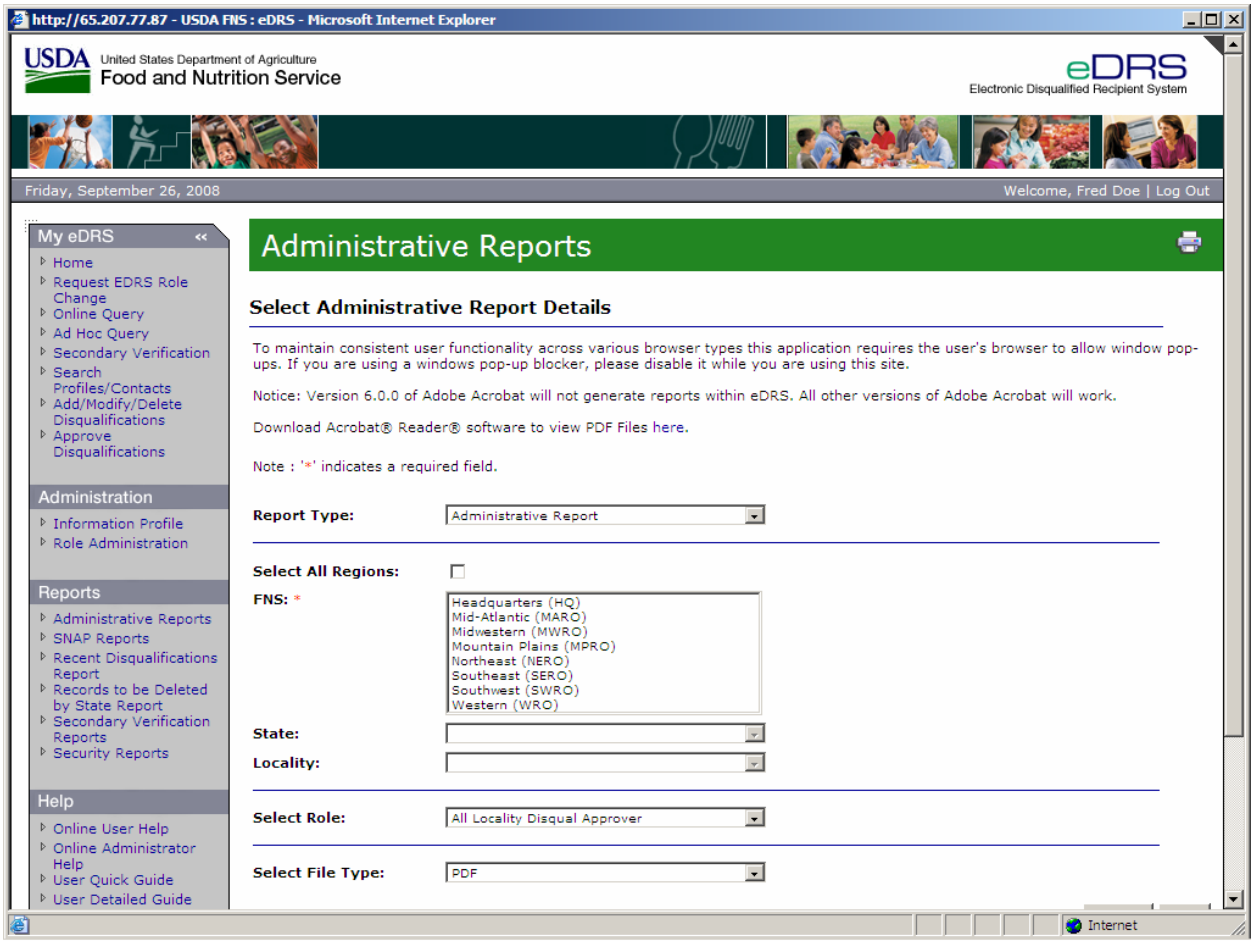
5.1 Administrative Reports

The Administrative Reports function allows users to generate reports on user administrative data (e.g., who logged on, when they last logged on, from what IP address they logged on, and their contact information).

To run an Administrative Report:

1. Click on **Administrative Reports** under Reports on the left menu bar. The Administrative Reports screen appears, as shown in Figure 76.

Figure 76. Administrative Reports Screen



2. Select the appropriate report type in the **Report Type** drop down list.
3. Select the **Region** for which you would like to run the report. Region 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 **User Role** (if desired) from the **Select Role** drop down list for which you would like to run the report.
7. Select the **File Type** from 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 report, select the **Print** icon from the PDF or MS Word toolbar.

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

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

5.2 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:

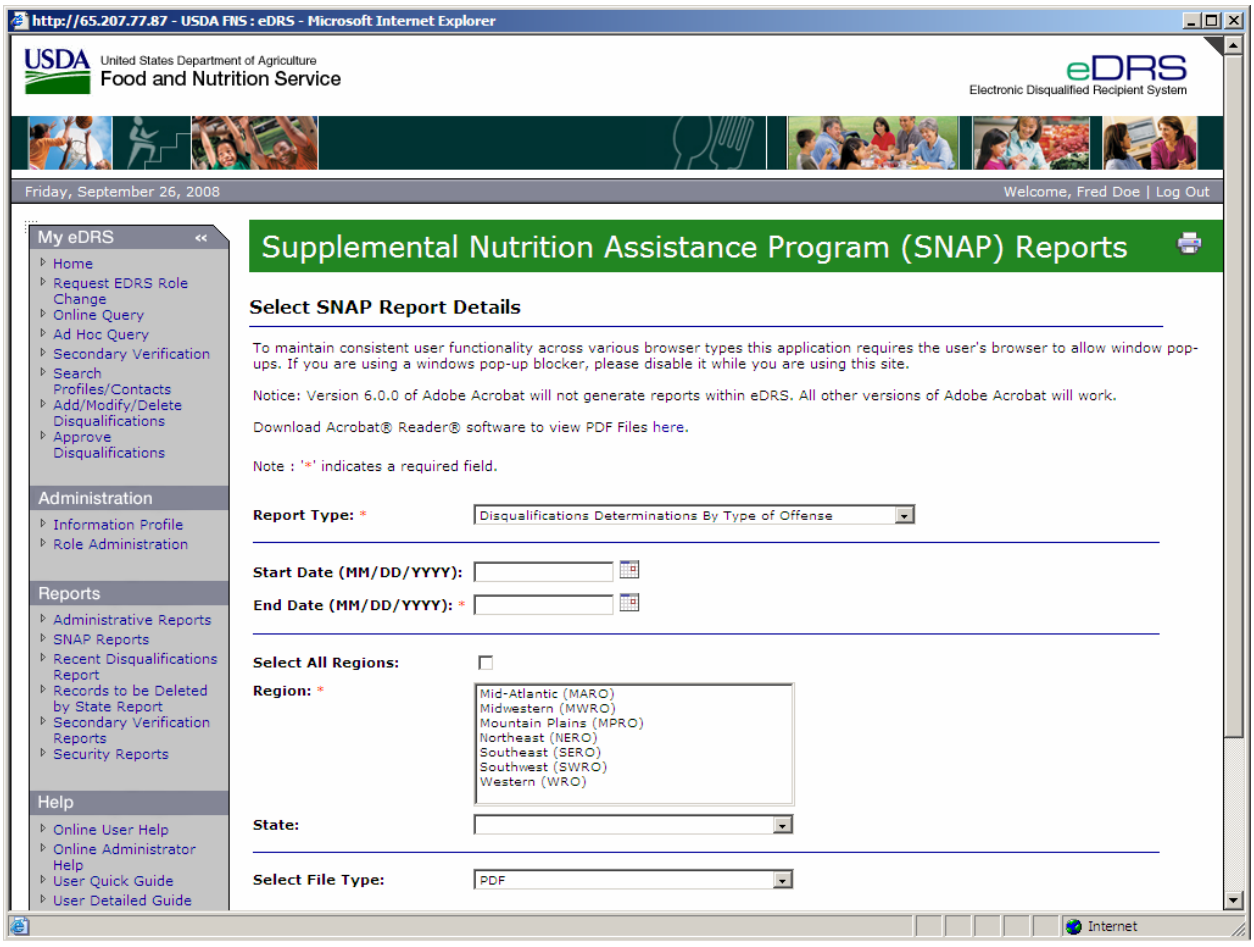
- Disqualifications Determination by Type of Offense – Lists number of disqualifications by offense type.
- Edit Error Summary Report – Provides a list of errors found in records and displays the number and type of error.
- Edit Error Detail Report – Provides details on disqualification records that had warnings or fatal errors while uploading into 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 date range.
- 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:

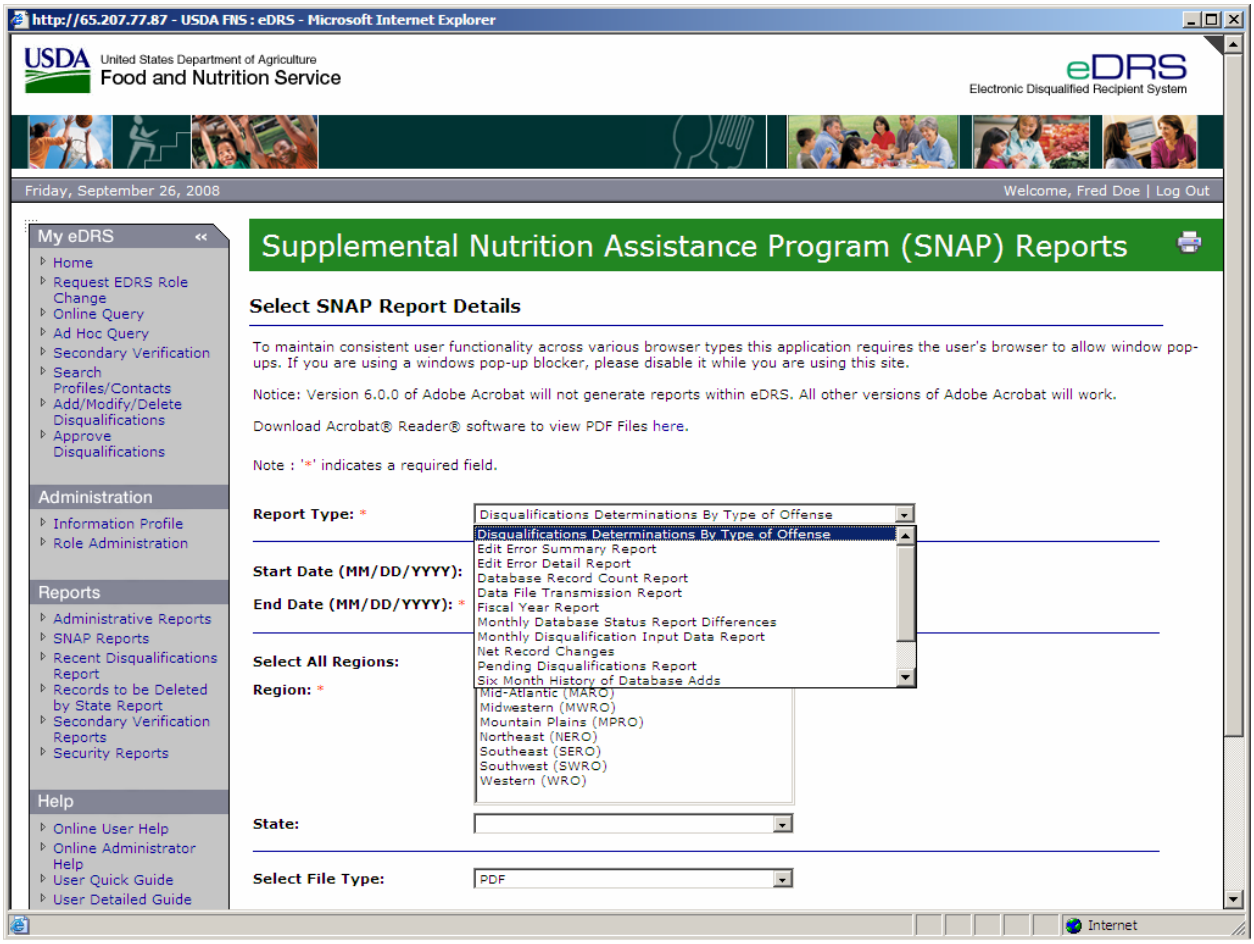
1. Click on **SNAP Reports** under Reports on the left menu bar. The SNAP Reports screen appears, as shown in Figure 77.

Figure 77. SNAP Reports Screen



2. Select the Report Type in the **Report Type** drop down list as demonstrated in Figure 78.

Figure 78. SNAP Reports, Report Types Screen



3. Select the **Region** 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 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 on the PDF, MS Word, or MS Excel toolbar.
10. To clear the page and use new/different parameters, click the **Clear** button.

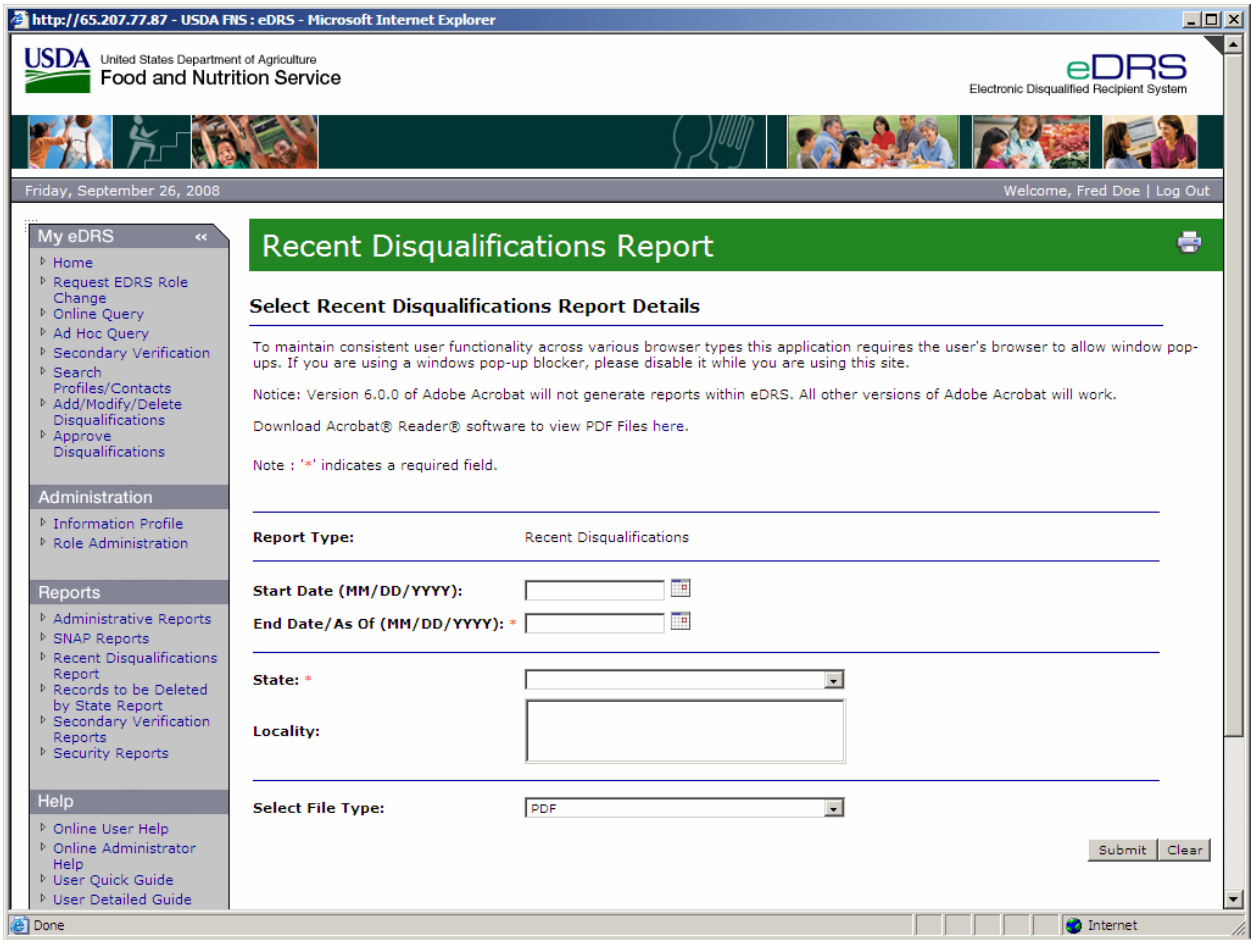
5.3 Recent Disqualification Reports

The Disqualification Report function allows users to generate reports on Recent Disqualifications submitted by states. The report provides a listing of the disqualifications records submitted within a period of time.

To run a Recent Disqualification Report:

1. Click on **Disqualification Reports** under Reports on the left menu bar; the Recent Disqualifications Report screen will appear as shown in Figure 79.

Figure 79. 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. 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
7. Click the **Submit** button to view the report.
8. To print the report, select the **Print** icon on the PDF or MS Word toolbar.
9. To clear the page and use new/different parameters, click the **Clear** button.

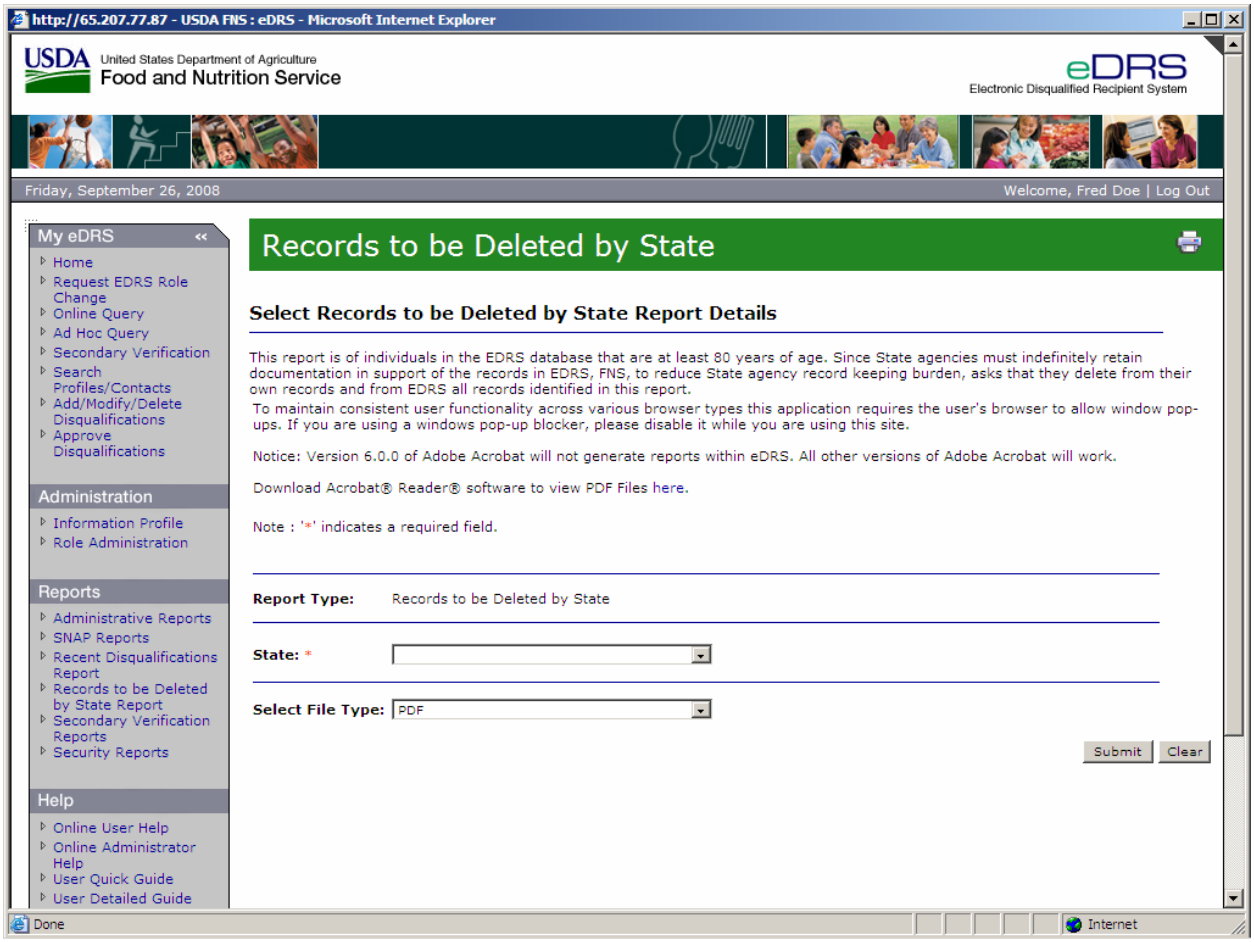
5.4 Records to be Deleted by State

The Records to be Deleted by State function allows users to generate reports and view disqualification records that will be deleted by State. This report displays individuals in the eDRS database that are 80 years of age or older. 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 a 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 Report Details screen displays, as shown in Figure 80.

Figure 80. Records to be Deleted by State Report Details 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 on the PDF or MS Word toolbar.

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

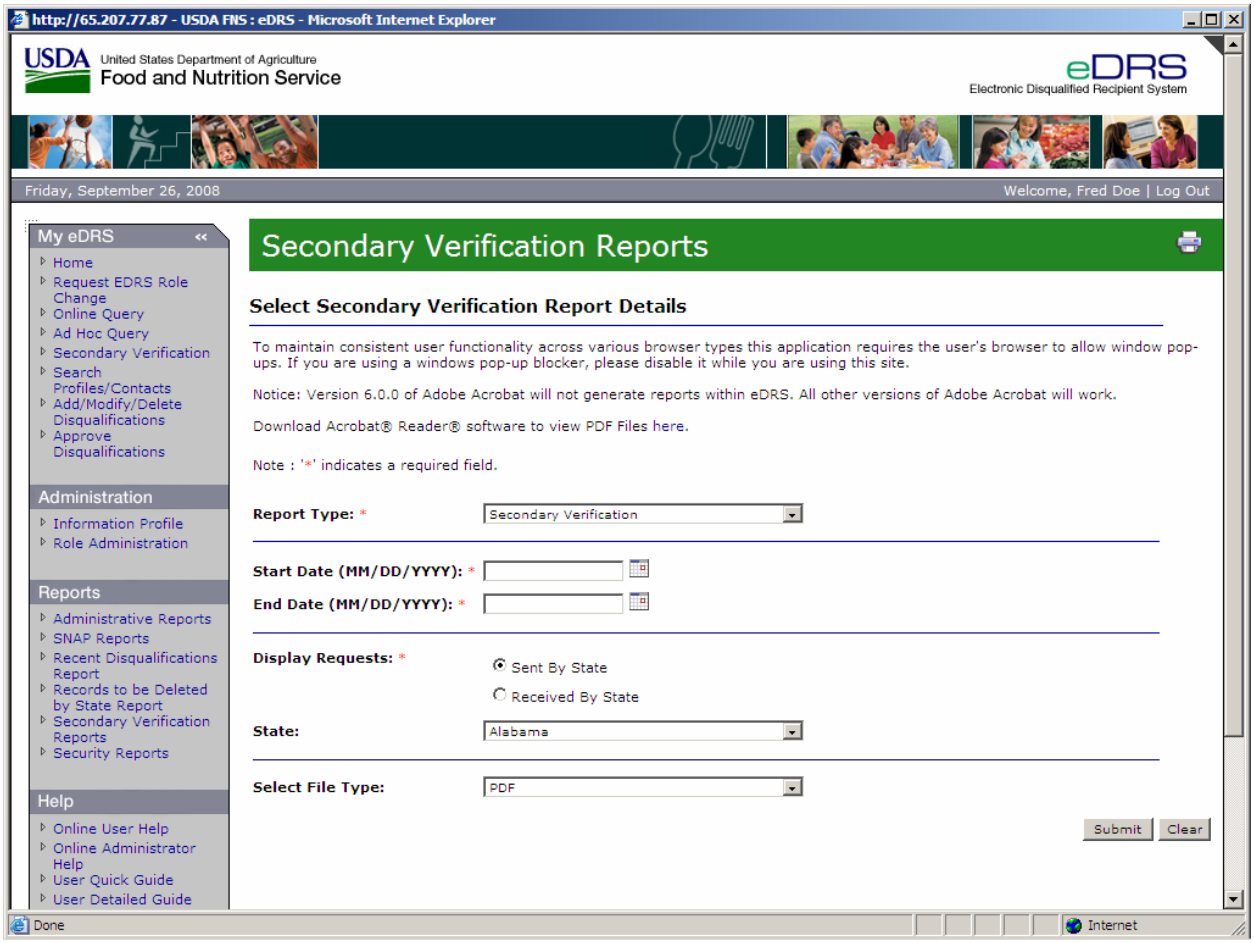
5.5 Secondary Verification Report

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:

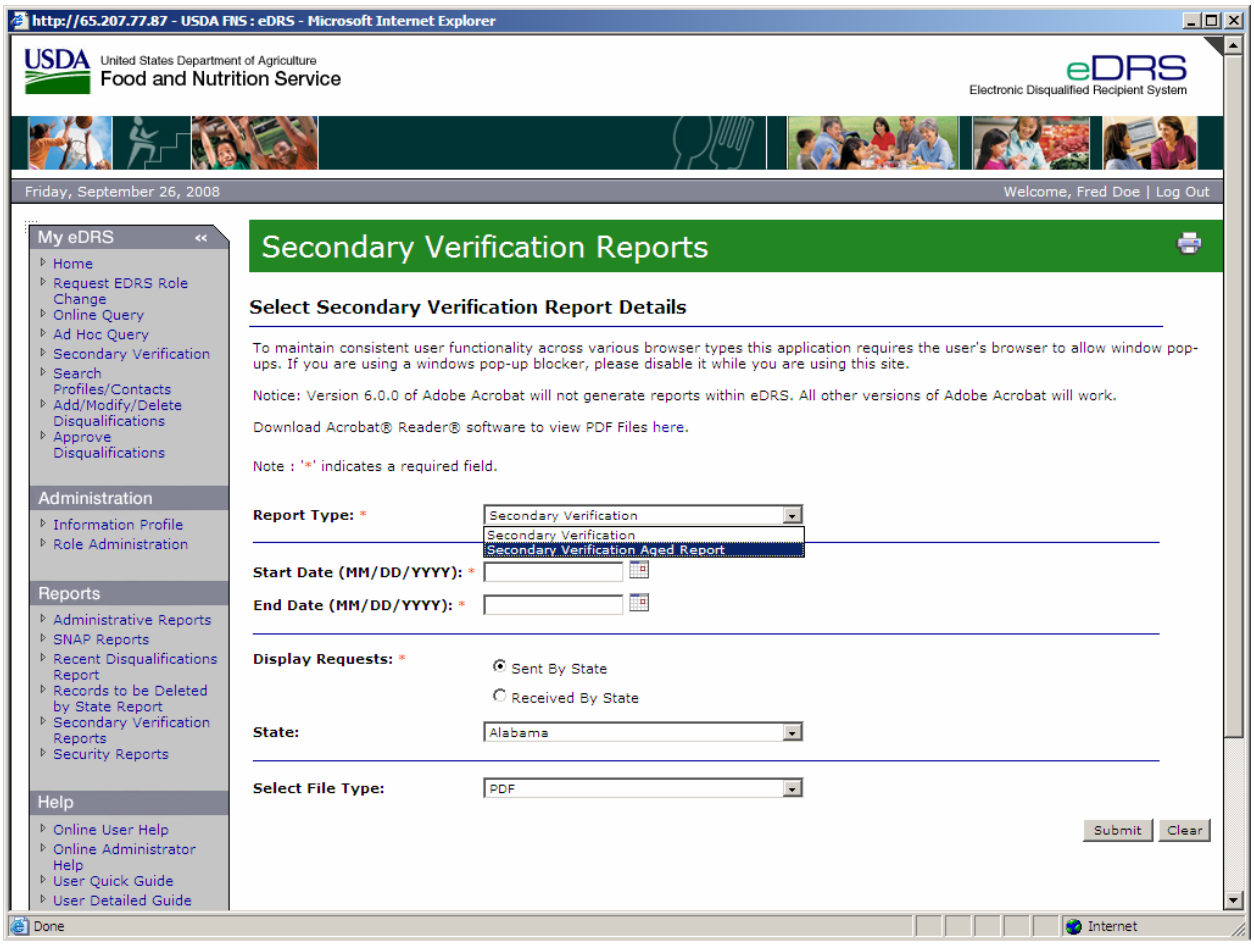
1. Click on **Secondary Verification Reports** under Reports on the left menu bar. The **Secondary Verification Reports** screen displays, as shown in Figure 81.

Figure 81. Secondary Verification Reports Screen



2. Select the report type in the **Report Type** drop down list as shown in Figure 82.

Figure 82. Secondary Verification Reports, 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 a 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 on the PDF or MS Word toolbar.
10. To clear the page and use new/different parameters, click the **Clear** button.

5.6 Security Reports

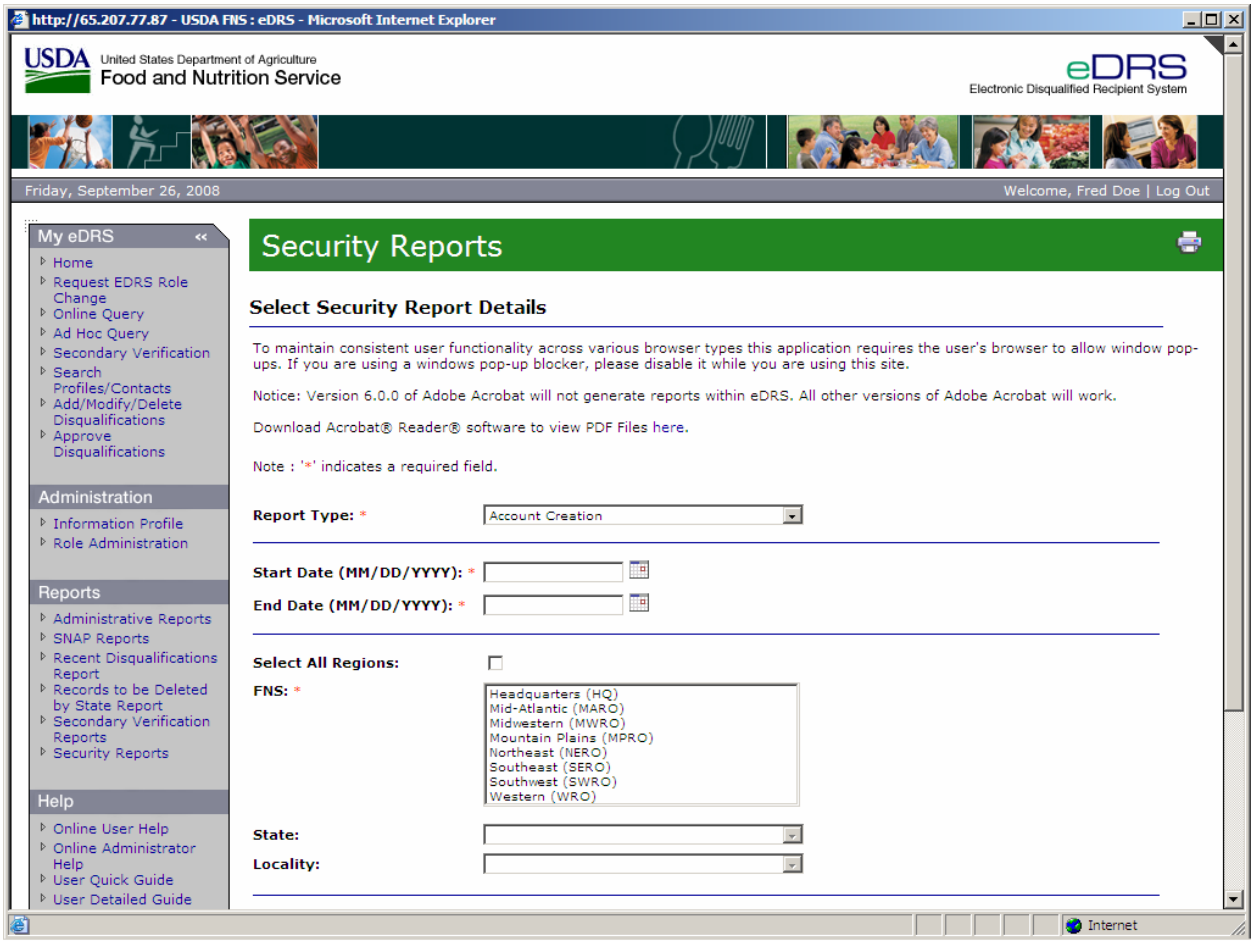
The Security Reports function allows the Administrators to generate reports on security-related user activity or to run a User Search Report. The reports available are:

- Account Creation – Account created during a specified time period
- Account Deactivation – Accounts deactivated during a specified time period
- Account Lockout – Accounts locked out during a specific time period
- Session Duration – Session duration of users during a specified time period
- User Account – User account activity during a specified time period
- User Inactivity – User account inactivity during a specified time period
- User Search – User searches within the system

To run a security report:

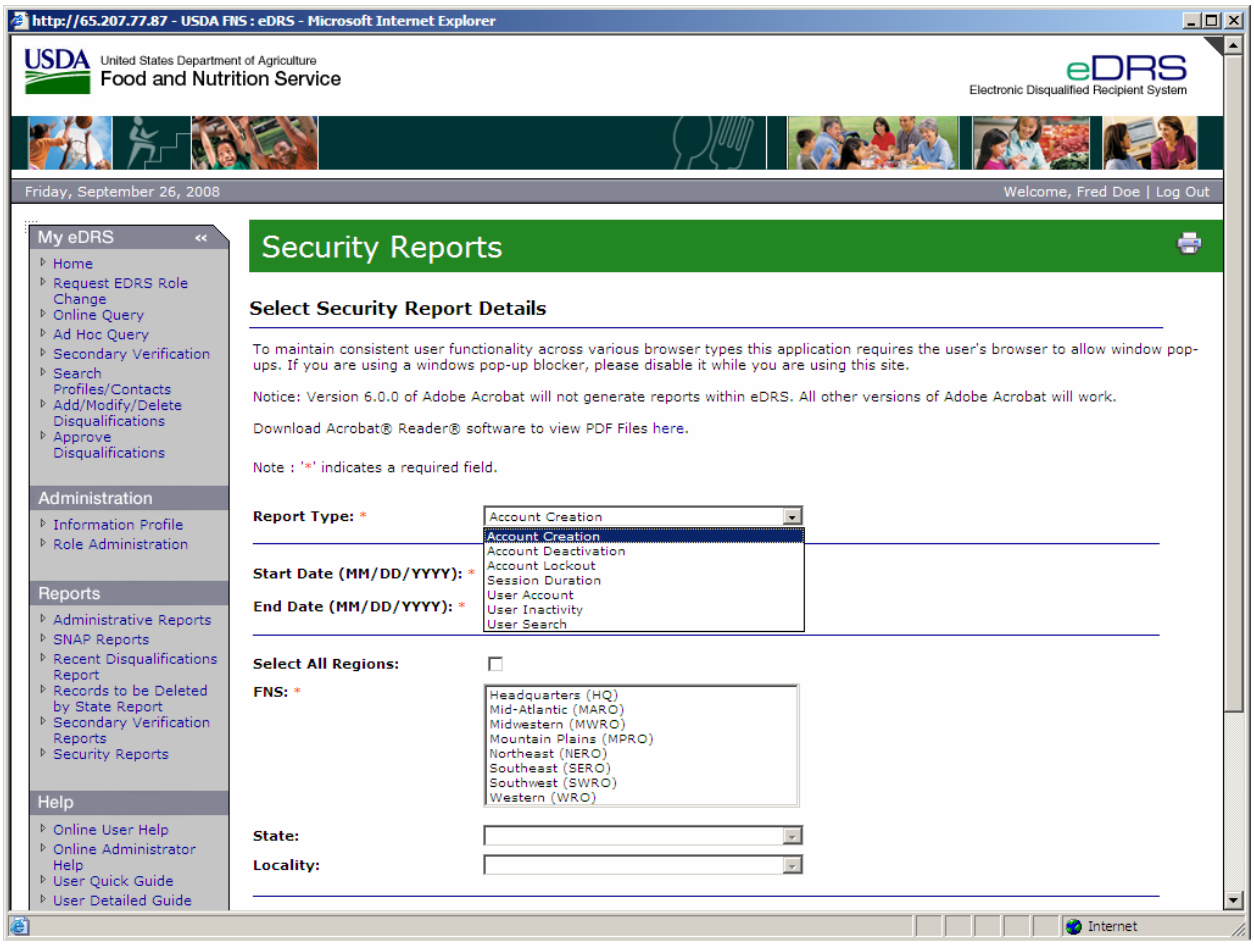
1. Click on **Security Reports** under Reports on the left menu bar. The Security Reports screen displays, as shown in Figure 83.

Figure 83. Security Reports Screen



2. Select the Report Type in the **Report Type** drop down list as shown in Figure 84.

Figure 84. Security Reports, Report Types 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 **Region** for which you would like to run the report. Region 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 **Locality** (if State is chosen and if so desired) for which you would like to run the report.
8. 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
9. Click the **Submit** button to view the report.
10. To print report, select the **Print** icon on the PDF or MS Word toolbar.
11. To clear the page and use new/different parameters, click the **Clear** button.

6 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.

6.1 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** or **Online Administrator 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.

6.2 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.

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

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 page or on the eDRS Help Desk screen that can be accessed in the menu bar. The Online Form will appear 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)

3. Enter all required information and click the Submit button to submit the form to the Help Desk.
4. Sending an e-mail directly to the Help Desk at eDRSHelpDesk@fns.usda.gov describing your problem(s).

6.3 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 or enhancing the system. 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.

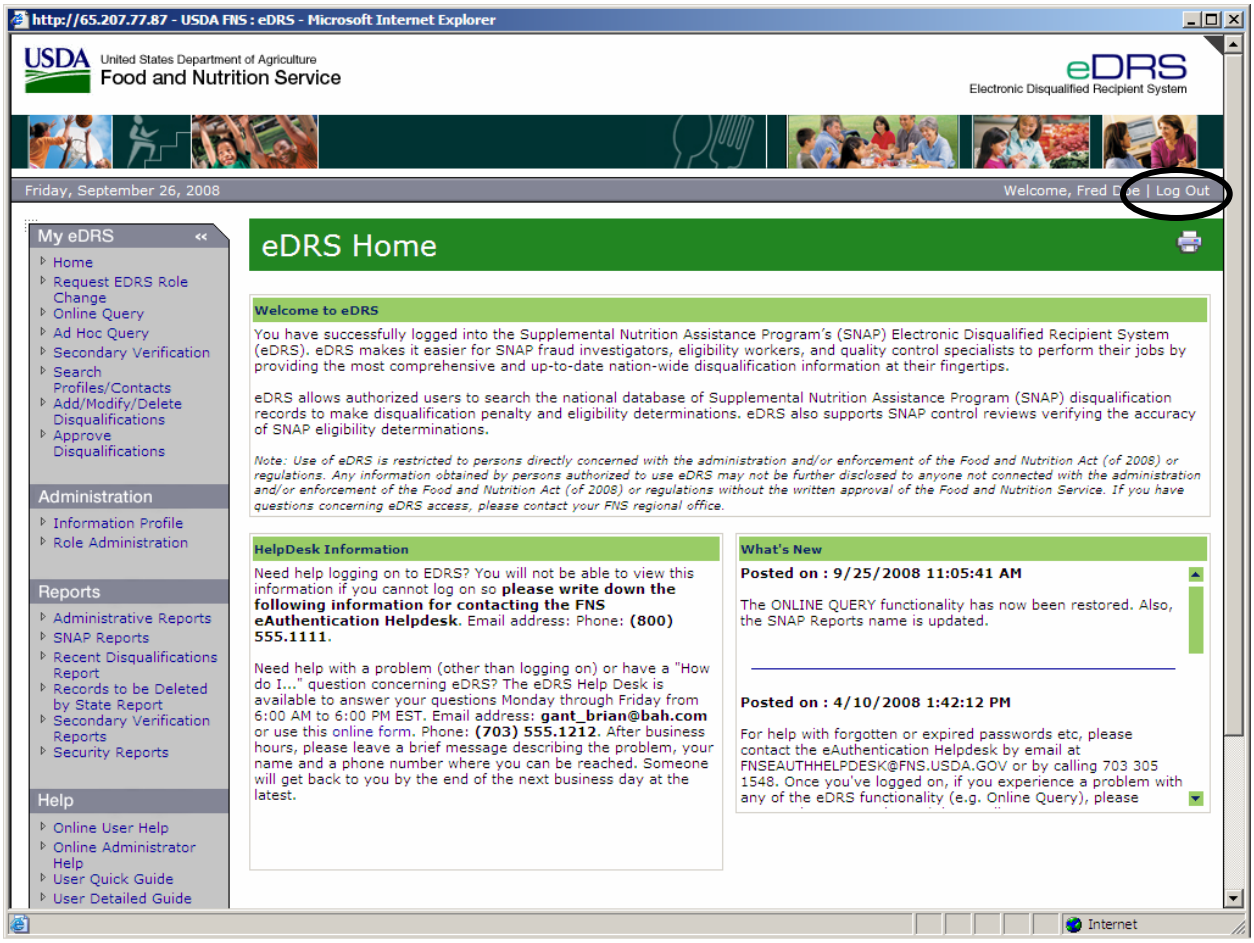
7 Logging Out

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

To log out of the application:

1. Click **Logout** at the top right of the screen, as shown in Figure 85.

Figure 85. eDRS Home Page, Logout Screen



2. 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.

APPENDIX A: GLOSSARY

CSAMS	Central Security Administrative Management System
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
HQ	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.
RC	Regional Coordinator
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.
RSO	Regional Security Officer
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