Step by Step Instruction:

How to Create a Brown Box Catalog Requisition

Professional Standards Learning Code 1170 Length: 15 minutes



"How to Create a Brown Box Requisition" is intended for the School Food Authorities in the state of Arizona. All regulations are specific to operating the USDA Foods Program under the direction of the Arizona Department of Education.

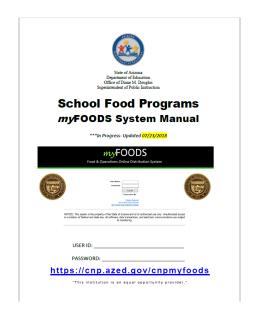
Intended Audience and Content

- This *How-To-Guide* is intended for Recipient Agencies (RAs) operating the USDA Foods in Schools Program who would like to request USDA Foods for use the following school uear.
- The following slides provide guidance on how to create a Brown Box Catalog Requisition and the follow-up steps.

Objectives

At the end of this training, attendees should be able to:

- understand how to read the Brown Box Catalog;
- create and place a requisition; and
- complete follow-up steps.



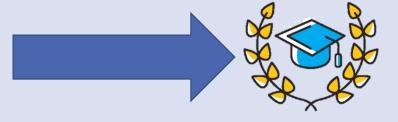
The instruction within this How-To-Guide is based on the <u>myFOODs</u> <u>system manual</u>.

Section: Product Catalogs (pages 6-7)

It is recommended to review the myFOODs system manual in addition to completing this How-To-Guide for complete understanding of important dates and requesting materials for the upcoming school year.

Comprehension Check

- Throughout this guide there will be comprehension quiz questions to test your knowledge and help you apply what you're learning.
- Be sure to review these quiz questions and the answers, available within the guide.
- This icon will indicate a comprehension quiz question, and the background of the slides will be a lighter color like you see on this slide.



Definitions

Brown Box Catalog: A list of available materials (USDA Foods) in which an RA can request cases up to their entitlement limit.

Brown Box Catalog Requisition: A request submitted through myFOODS to purchase cases of USDA Foods on behalf of the RA using the RA's available entitlement.

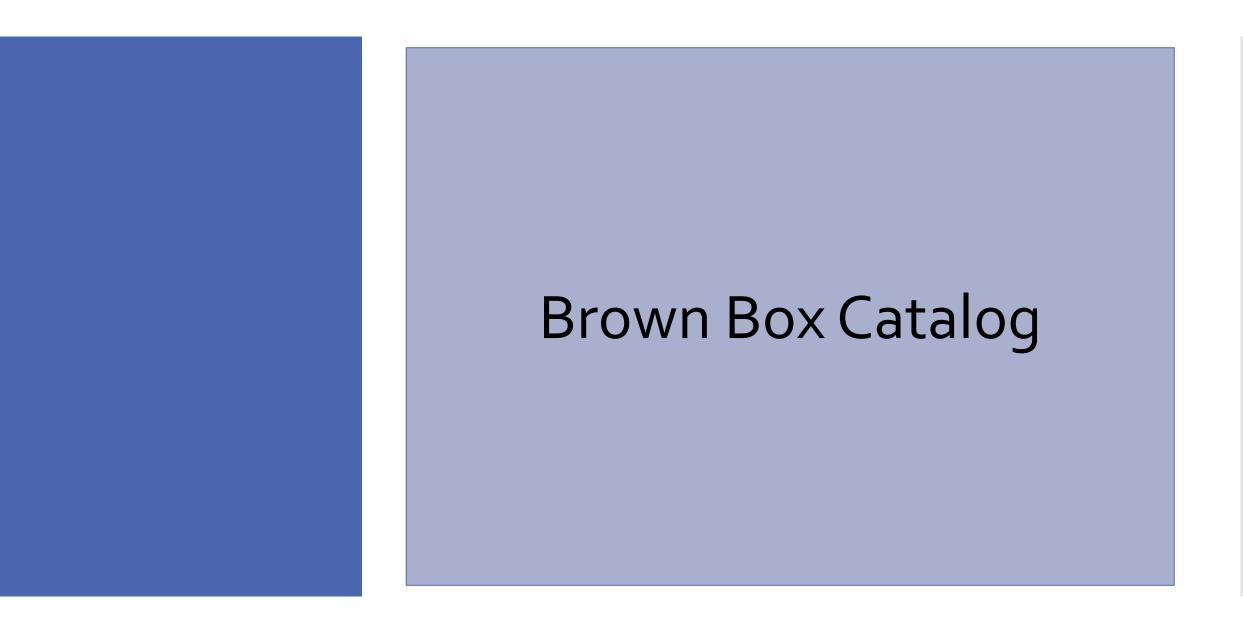
USDA Shipping Period: A date range in which an RA would like materials to be available in the Available Materials List, requested from the Catalog.

School Year: The operating period for Child Nutrition Programswhich is July 1-June 30.

The Step by Step Instruction will review:

Brown Box Catalog	Slides 8-11
Selecting Materials	Slides 12-18
Placing a Requisition	Slides 19-26
Follow-up Steps	Slides 27-30
Questions and Answers	Slides 31-32

The following slides will only cover how-to instructions for Placing a Brown Box Catalog Requisition. Please refer back to the <u>ADE Online Training Library</u> for other myFOODs system processes.

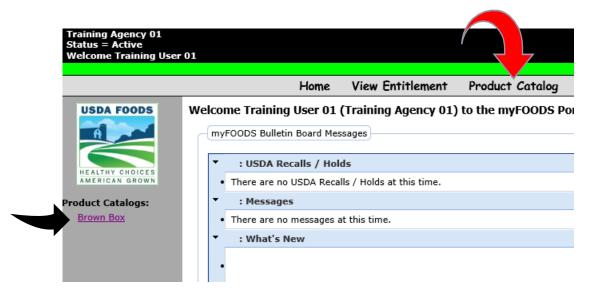


Brown Box Catalog

Brown Box Catalog

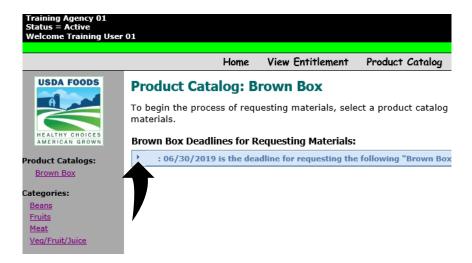
- An RA requests materials from the catalog to be received and used in the next school year
- Catalog is available February March
- ADE processes requisitions in March and orders are placed with USDA in April
- ADE will announce completed/purchased requisitions in April/May
- View 209 Report USDA Foods allocated and received

Brown Box Catalog

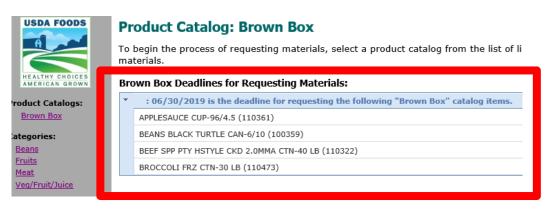


- 1. Click Product Catalog (red arrow).
- 2. If a catalog is available, the link will be on the left side of the screen (black arrow).
- 3. Click Brown Box.

Brown Box Catalog



- 4. A number of Categories display- you may click each category to view all the materials available in that category.
- 5. OR you may click the blue band to expand and display all of the materials available in list form (not by category).



Comprehension Check

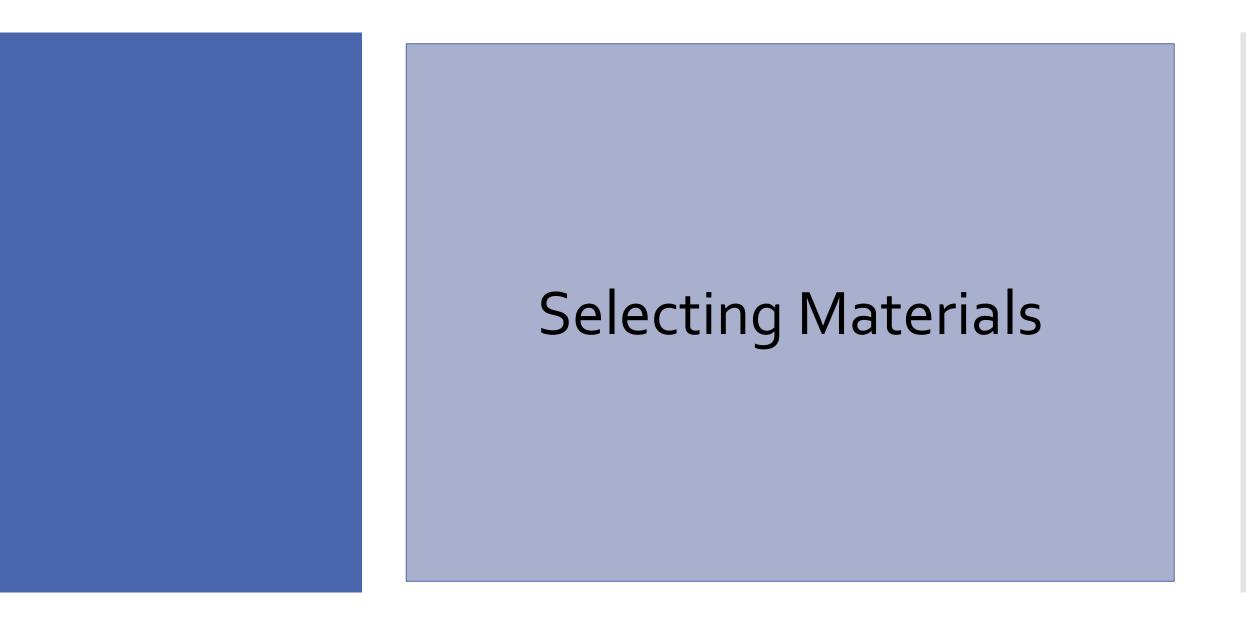
True or False: Placing a Brown Box Catalog requisition is a way to obtain USDA Foods for the current school year.



Comprehension Check

False. The Brown Box Catalog Requisition process is a request for materials the following school year.

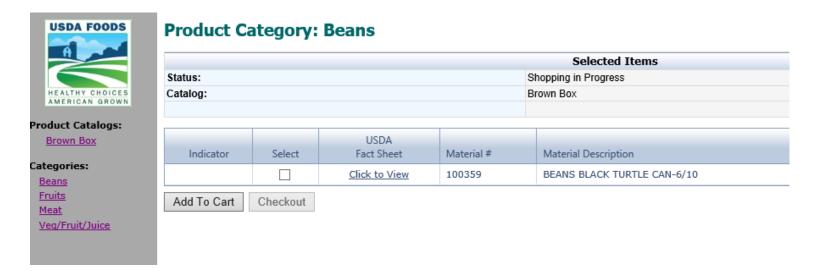




Selecting Materials

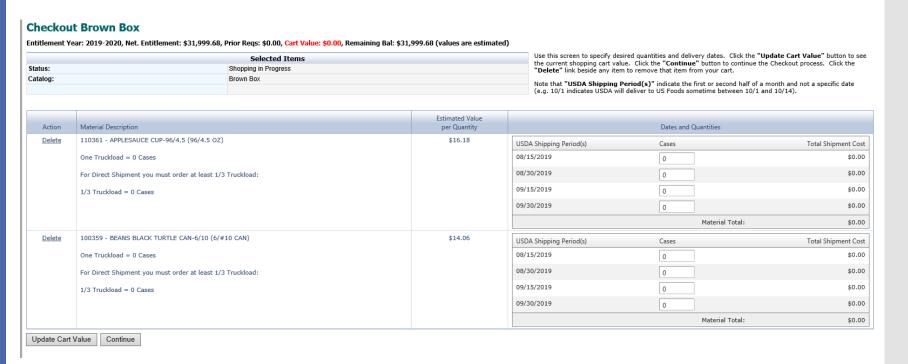
- An RA can only request materials from one catalog at a time
- The requisition(s) from one catalog must be completed before requesting materials from a different catalog
- Create requisitions for USDA Shipping periods in which you want to begin scheduling the materials for shipment
- Create requisitions for similar USDA Shipping Periods to meet minimum case requirements when scheduling shipments

- 1. Click on the Category of the material you are requesting.
- 2. Select the material you want and click Add To Cart.



- 3. Once a material has been added to the cart, you may click on other categories and add additional materials to the cart. You will be creating *minimal* requisitions using this process.
- 4. OR you may checkout with the one material in your cart. You will be creating *multiple* requisitions using this process.

- 5. Click Checkout.
- 6. Note the materials listed. If a material appears in the Checkout screen that you do not want, click Delete next to that material.



7. Note the USDA Shipping Periods -

8/15/2019 =this request will arrive at US Foods the first half of month (8/1 - 8/15) and be available to schedule a shipment.

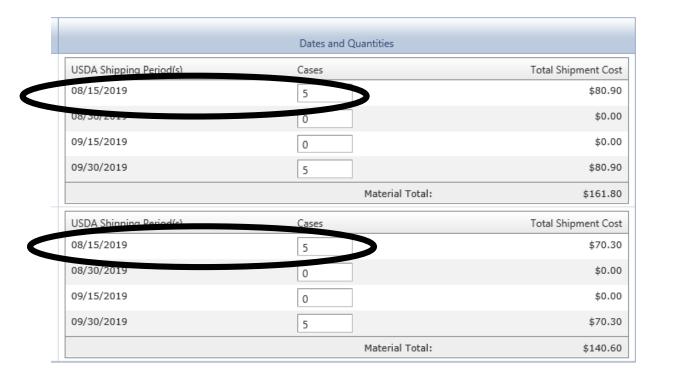
8/30/2019 = this request will arrive at US Foods the second half of month (8/15 - 8/30) and be available to schedule a shipment.

USDA Shipping Period(s)	Cases	Total Shipment Cos
08/15/2019	0	\$0.0
08/30/2019	0	\$0.00
09/15/2019	0	\$0.0
09/30/2019	0	\$0.0
	Material Total:	\$0.0
USDA Shipping Period(s)	Cases	Total Shipment Cos
08/15/2019	0	\$0.0
08/30/2019	0	\$0.00
09/15/2019	0	\$0.0
09/30/2019	0	\$0.00

- 8. When entering quantities, make sure you are considering:
 - When the material is needed for your menu must enter quantity in the first half of the month under the USDA Shipping Period if you need it for the second half of month
 - Storage capabilities what is your max capacity to take dry, refrigerated, or frozen materials?

	Dates and Quantities	
USDA Shipping Period(s)	Cases	Total Shipment Cost
08/15/2019	5	\$80.90
08/30/2019	0	\$0.00
09/15/2019	0	\$0.00
09/30/2019	5	\$80.90
	Material Total:	\$161.80
USDA Shipping Period(s)	Cases	Total Shipment Cost
08/15/2019	5	\$70.30
08/30/2019	0	\$0.00
09/15/2019	0	\$0.00
09/30/2019	5	\$70.30
	Material Total:	\$140.60

- 9. When entering quantities, make sure you are considering:
 - Meeting minimum case requirements (when scheduling a shipment) when entering quantities for specific USDA Shipping Periods, make sure the total quantity for that period TOTAL your minimum case requirement (this can be found by clicking My Agency in myFOODS).



Comprehension Check

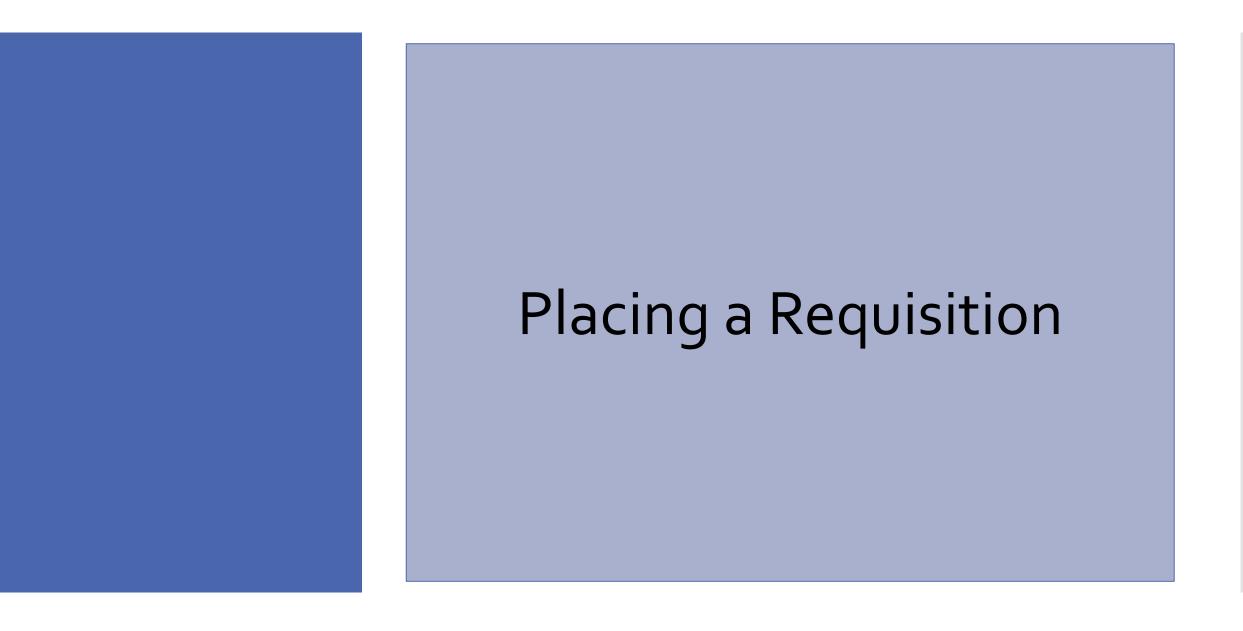
True or False: The USDA Shipping Period is a great way to ensure I can meet minimum case requirements when scheduling a shipment.



Comprehension Check

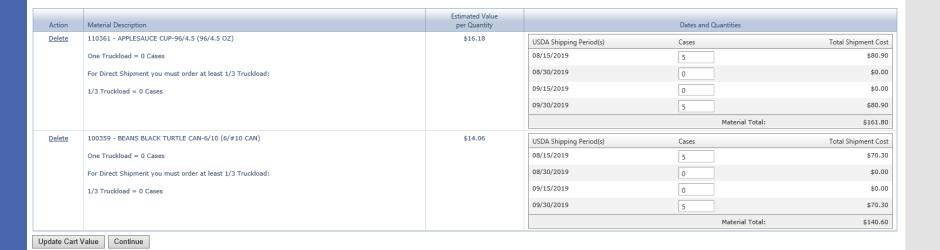
True. The USDA Shipping Period is a time frame in which physical inventory of USDA Foods will be delivered to the warehouse. If I select multiple materials for the same USDA Shipping Period, they will all be delivered to the warehouse within 2 weeks of each other.



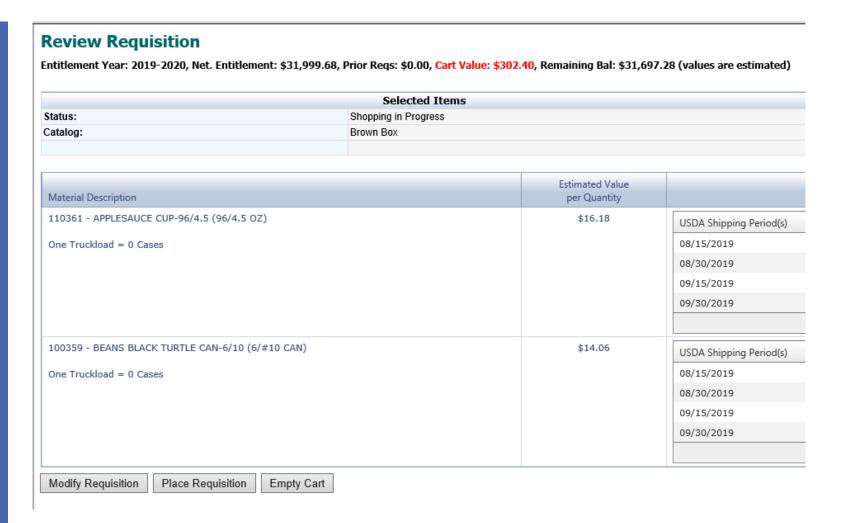


Placing a Requisition

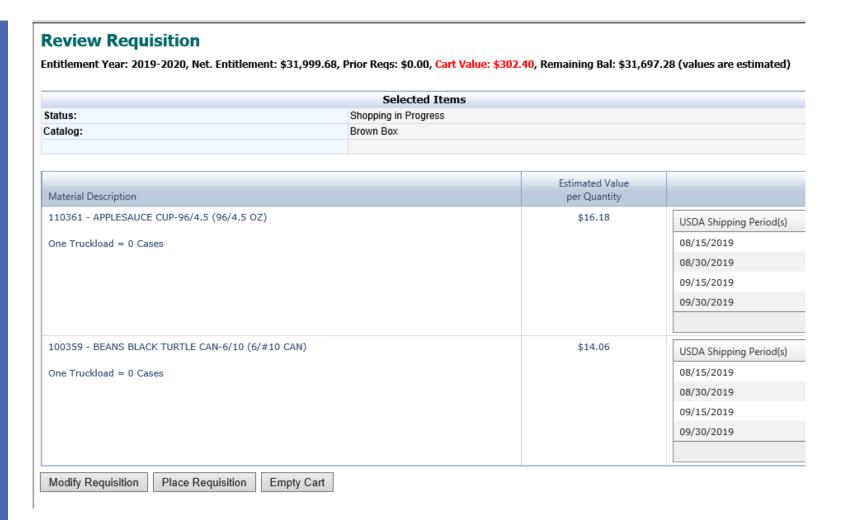
- An RA may leave materials in the cart and proceed with placing the requisition later (materials left in cart will not be purchased)
- A placed requisition may be deleted or edited up until the deadline
- When editing a placed requisition, you may only change or delete quantities, you may not add additional materials to the requisition
- An RA may place as many requisitions as necessary



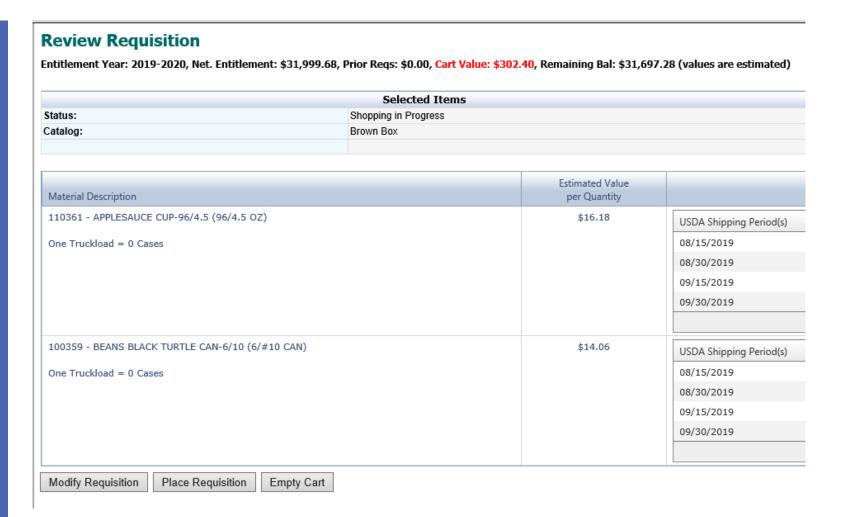
- 1. An RA may update the cart value at any time.
- 2. Deleting a material can be completed on this page.
- 3. Click Continue.



4. Note the entitlement values at the top of this page. If the remaining balance was negative, this requisition could not be placed.



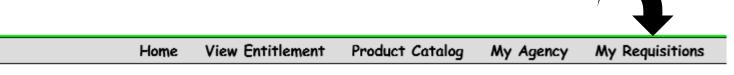
5. Click Modify Requisition if you would like to increase/decrease the quantity.



6. Click Place Requisition.



- 7. An email was sent to the user whom is logged in and placed the requisition.
- 8. Click My Requisitions in the toolbar.



My Requisitions

Using My Requisitions, you can view the status of requisitions within the system.

	Count	Requisition Status
F	8	Submitted
F	0	Processed

My Requisitions

Using My Requisitions, you can view the status of requisitions within the system.

	Count			Requisitio	Requisition Status				
4	8			Submitte	Submitted				
	View Edit req2 Br View Closed req13 S View Edit req24 Br View Closed req26 S View Edit req28 Br View Closed req33 S View Edit req43 Br		Catalog	Estimated Value	Created On	Created By			
			Brown Box	\$277.00	4/4/2019 10:11:09 AM	Training User 01			
			Surplus	\$266.60	4/4/2019 10:45:53 AM	Training User 01			
			Brown Box	\$277.00	5/8/2019 10:37:13 AM	Training User 01			
			Surplus	\$919.80	5/8/2019 10:48:46 AM	Training User 01			
			Brown Box	\$277.00	5/15/2019 11:47:40 AM	Training User 01			
			Surplus	\$331.20	5/15/2019 12:16:46 PM	Training User 01			
			Brown Box	\$138.50	5/29/2019 11:46:32 AM	Training User 01			
			Brown Box	\$302.40	6/20/2019 11:04:14 AM	Training User 01			
0			Processed	i					

- 9. Click the expand/collapse arrow.
- 10. An RA may Edit a requisition here.
- 11. Click Edit an RA may delete a material or change quantities.

Comprehension Check

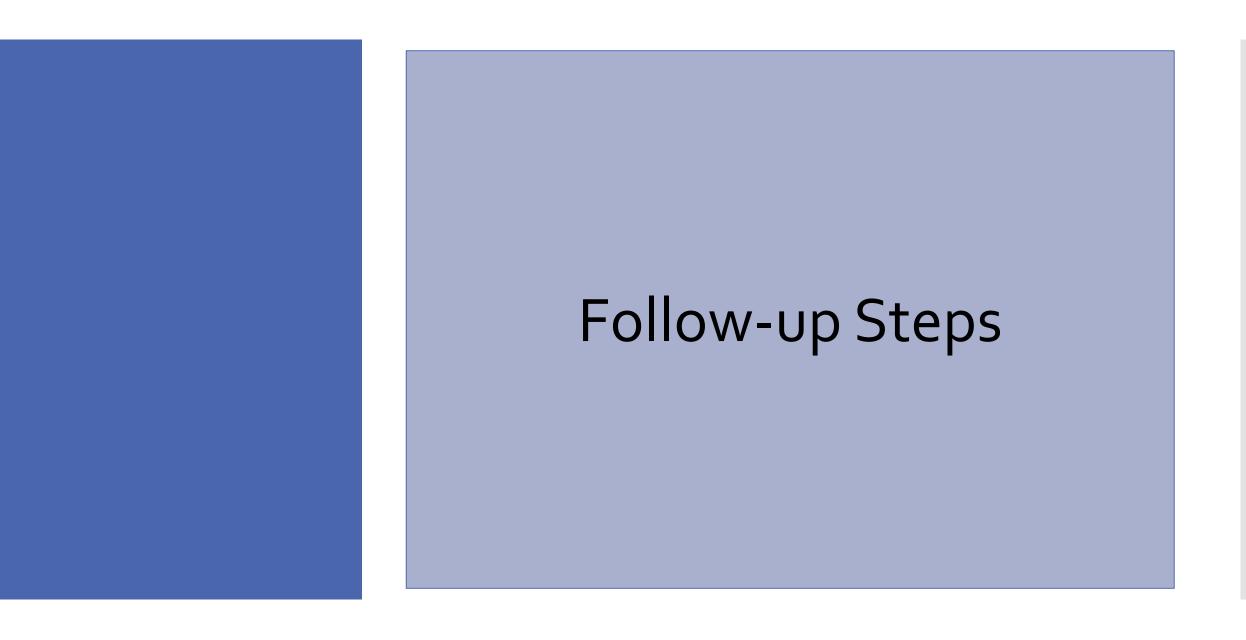
True or False: Once a Brown Box Catalog requisition is placed, I can no longer delete, modify, or edit the requisition as the USDA Foods Program has already processed my request.



Comprehension Check

False. An RA can delete requisitions and start over, or modify quantities on a submitted requisition. The Brown Box Catalog is available for a few weeks to ensure plenty of time to place requisitions. The USDA Foods Program will not process the requisition until the due date.

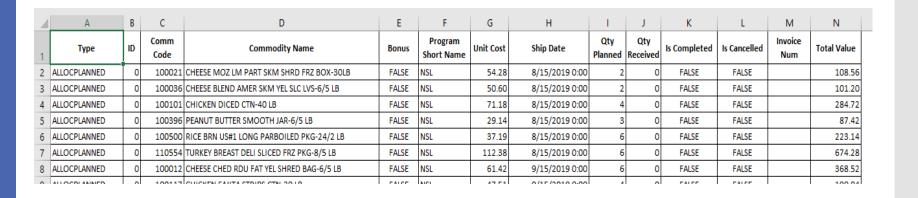




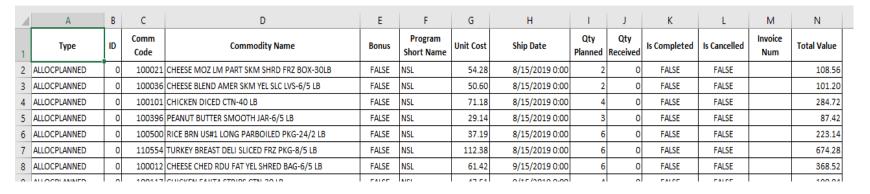


Follow-up Steps

If you completed a Brown Box Catalog requisition, upon ADE notification of completed Brown Box catalog purchases, review the "209 Report – USDA Foods Allocated and Received" found in myFOODS Reports. Select the upcoming fiscal year and click "Show Grid" (you may export the document to excel).



Follow-up Steps



The materials listed on the "209 Report – USDA Foods Allocated and Received" report will be displayed in the Available Materials list by July 1.

Click My Shipments.

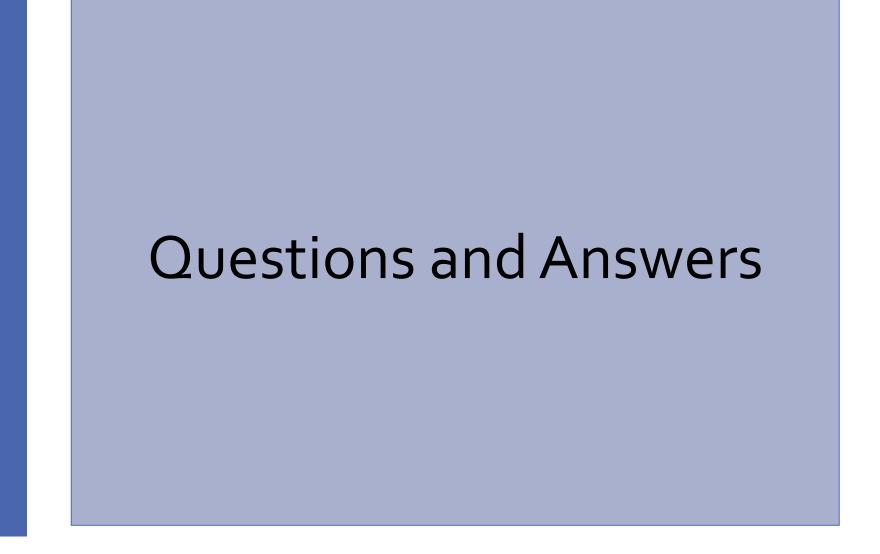


	Home View Entitl	lement Product Catalog	My Agency	My Requisitions	My Shipments	My Cart (0 Items in
Available Materials	Shipment Calendar	Shipment List				
Schedule Selecte	ed Items >>					
	Material					Program
	Cheese White Cheddar Re	educed Fat Shredded (100011)				NSL
	CHICKEN OVEN ROASTEE	D FRZ 8 PC CTN-30 LB (110080)				NSL
	CORN FRZ CTN-30 LB (100348)					
	Egg Patties Round Frozen	(110931)				NSL
	OIL VEGETABLE BTL-6/1	GAL (100439)				NSL
	PEANUT BUTTER SMOOTH	H PKG-100/1.1 OZ (110710)				NSL
	PEARS SLICES EX LT CAN	N-6/10 (100224)				NSL
	PORK HAM WATERAD FR	Z PKG 4/10 LB (100184)				NSL
	Spaghetti Sauce Meatless	s Can 6/10 (100336)				NSL
	SPAGHETTI SAUCE MEAT	TESS POUCH-6/106 OZ (110177)			NSI

Follow-up Steps



Remember, an RA cannot schedule shipments for materials in yellow. You must wait until the USDA Shipping Period and the physical truck to arrive. The materials will then be in white and an RA can schedule shipments.



Questions and Answers

Is it okay if an RA does not place requisitions for the following year?

 Yes, it is ok but the RA will only receive materials by placing Surplus Catalog requisitions throughout the year OR putting entitlement towards the DoD Fresh Produce program.

Once requisitions have been placed, can RA's make modifications?

• Yes, an RA may modify, delete, and create requisitions up until the due date (USDA Foods Program gives 3-6 weeks to place requisitions).

Once an RA has been notified that all requisition requests have been purchased with USDA, can an RA then change their requisition requests?

 No, once all materials are purchased on an RA's behalf, the RA must plan to schedule the materials for shipment once available in the Available Materials list. This can be found by clicking My Shipment in myFOODS.

Are Brown Box Catalog requisitions to request materials for the current year?

 No, the Brown Box Catalog requisition process is to request materials for the upcoming school year.

Technical Assistance

If you have any questions about Brown Box Catalog Requisitions, use:

The myFOODs System Manual at: https://www.azed.gov/sites/default/files/2019/05/
myFOODS%20Training%20Manual_2018%
20SY19.pdf?id=5cfoob231dcb250954d3c2ab

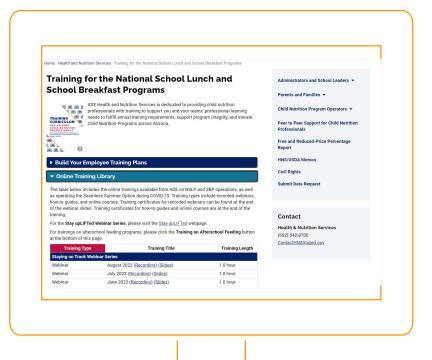
For other questions about Brown Box Catalog Requisitions, please contact your USDA Foods Program at <u>USDAFoods@azed.gov</u>.

End of Training

ADE Online Training Library

Online trainings are easy to use and available year round. Directors and staff are encouraged to complete these trainings as a way to review previously learned subjects, or as an introduction to a regulation.

Please take some time to browse through the <u>ADE Online Training</u> <u>Library</u> to review additional resources.



End of Training

Congratulations!

You have completed the **Step by Step Instruction: How to Create a Brown Box Catalog Requisition.**

In order to count this training towards your Professional Standards training hours, the training content must align with your job duties.

- Information to include when documenting this training for Professional Standards:
 - Training Title: Step by Step Instruction: How to Create a Brown Box Catalog Requisition
 - Learning Code: 1170
 - Key Area: 1000- Nutrition
 - Length: 15 minutes
- Please note, attendees must document the amount of training hours indicated on the training despite the amount of time it takes to complete it.



End of Training

Requesting a Training Certificate

Please click on the link below to complete a brief survey about this training. Once the survey is complete, you will be able to print your certificate of completion from Survey Monkey. *This will not appear in your Event Management System (EMS) account.

https://www.surveymonkey.com/r/OnlineHowToGuides

The information below is for your reference when completing the survey.

Training Title: **Step by Step Instruction: How to Create a Brown Box Catalog Requisition**

Professional Standards Learning Code: 1170

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: https://www.usda.gov/sites/default/files/documents/USDA-OASCR%20P-Complaint-Form-0508-0002-508-11-28-17Fax2Mail.pdf, from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

- 1. mail: U.S. Department of Agriculture Office of the Assistant Secretary for Civil Rights 1400 Independence Avenue, SW Washington, D.C. 20250-9410;
- 2. fax: (202) 690-7442; or
- 3. email: program.intake@usda.gov.

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