Step by Step Instruction:
How to Create a Surplus Catalog Requisition

Professional Standards Learning Code 1170
Length: 15 minutes

***Revised** August 2022*

"How to Create a Surplus Catalog 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.

Step by Step Instruction:
How to Create a Surplus Catalog Requisition

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 from excess inventory for use through out the school year.
- The following slides provide guidance on how to create a Surplus Catalog Requisition.

Step by Step Instruction:
How to Create a Surplus Catalog Requisition

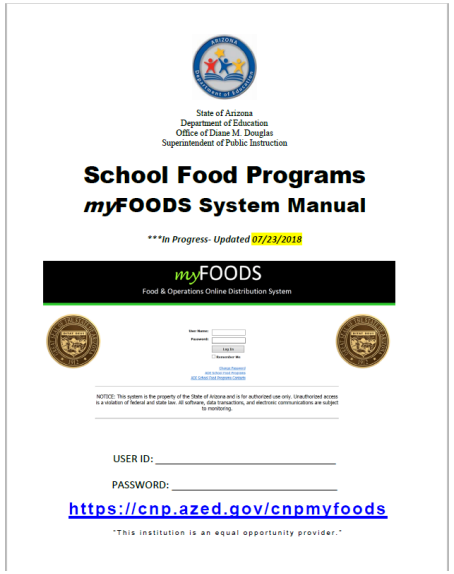
Objectives

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

- understand how to read the Surplus Catalog;
- create and place a requisition; and
- review the shipment.

Step by Step Instruction:

How to Create a Surplus Catalog Requisition



State of Arizona
Department of Education
Office of Diane M. Douglas
Superintendent of Public Instruction

School Food Programs
***myFOODS* System Manual**

****In Progress- Updated 07/23/2018*

*my*FOODS
Food & Operations Online Distribution System

NOTICE: This system is the property of the State of Arizona and is for authorized use only. Unauthorized access is a violation of federal and state law. All software, data transactions, and electronic communications are subject to monitoring.

USER ID: _____

PASSWORD: _____

https://cnp.azed.gov/cnpmyfoods

"This institution is an equal opportunity provider."

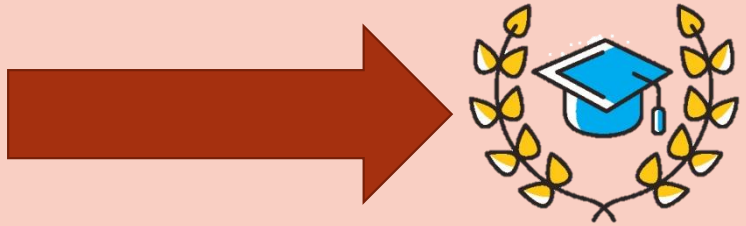
The instruction within this How-To-Guide is based on the myFOODs system manual.

- Section: Product Catalogs (pages 6, 8-9)

It is recommended to review the myFOODs system manual in addition to completing this How-To-Guide for complete understanding of requesting materials throughout the 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.



Step by Step Instruction:

How to Create a Surplus Catalog Requisition

Definitions

Surplus Catalog: A list of available materials (USDA Foods) in which an RA can request cases. The surplus catalog allows the USDA Foods Program to properly manage physical inventory levels.

Surplus Catalog Requisition: An RA request submitted through myFOODS to request a case(s) of USDA Foods.

Surplus: Excess inventory that was ordered to assist with purchasing full truck loads or an RA declined materials from the Available Materials list in myFOODS.

Step by Step Instruction: *How to Create a Surplus Catalog Requisition*

The Step by Step Instruction will review:

Surplus Catalog	Slides 7-10
Selecting Materials	Slides 11-16
Placing a Requisition	Slides 17-20
Questions and Answers	Slides 21-22

The following slides will only cover how-to instructions for Placing a Surplus Catalog Requisition. ***Please refer back to the ADE Online Training Library for other myFOODs system processes.***

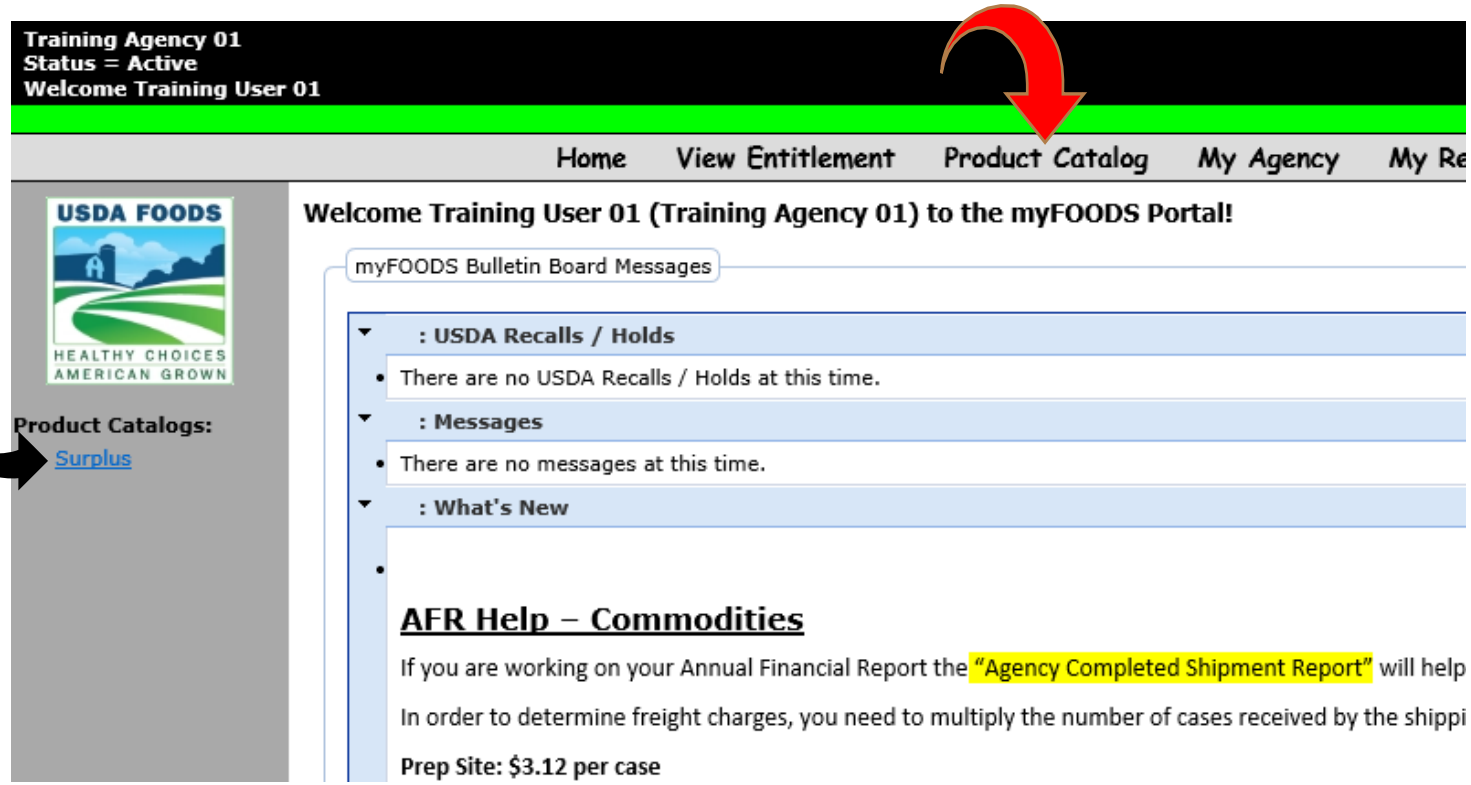
Surplus Catalog

Surplus Catalog

Surplus Catalog

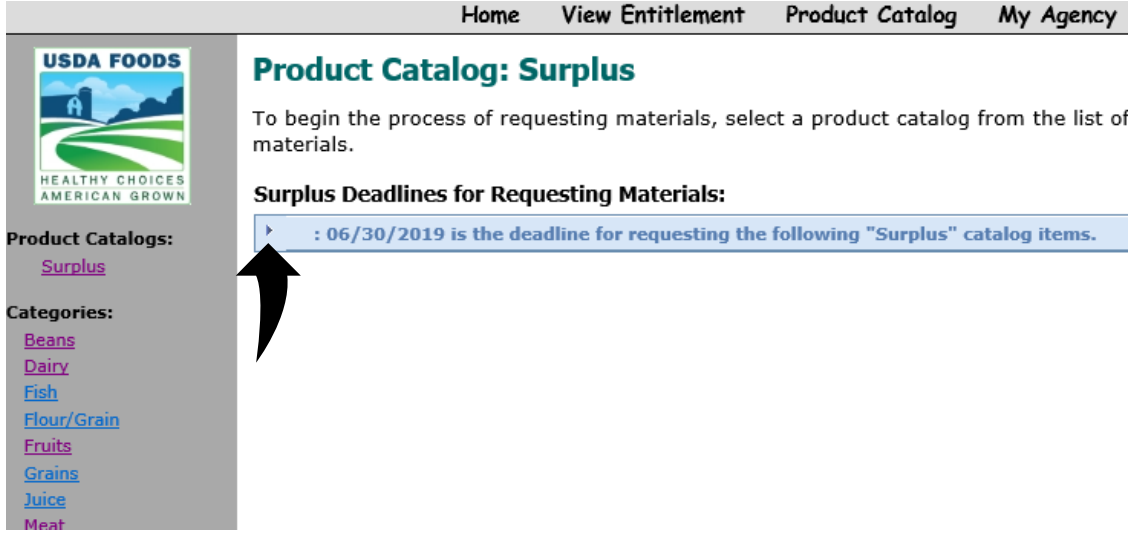
- An RA requests materials from the catalog to be received and used on their next available delivery date
- Catalog is available everyday that there is excess inventory from 6:30 am – 2:00 pm
- Requisitions are processed on the same day
- When requisitions are processed, the materials are scheduled for shipment on your next available delivery date – changes to quantities and delivery dates are not allowed
- View My Shipments, scheduled, to see the materials from your request

Surplus Catalog



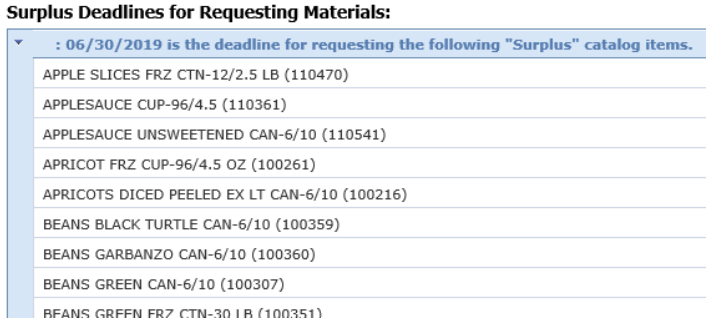
1. Click Product Catalog (red arrow).
2. If a catalog is available, the link will be on the left side of the screen (black arrow).
3. Click Surplus.

Surplus Catalog



4. A number of Categories will 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: The Surplus Catalog is a way for you to request USDA Foods even though you are currently out of entitlement.

Comprehension Check

True. The USDA Foods Program has to pay excess storage fees to the warehouse when physical inventory sits. The Surplus Catalog allows the USDA Foods Program the ability to move inventory and assist RAs by providing USDA Foods in the form of "bonus" entitlement.

Selecting Materials

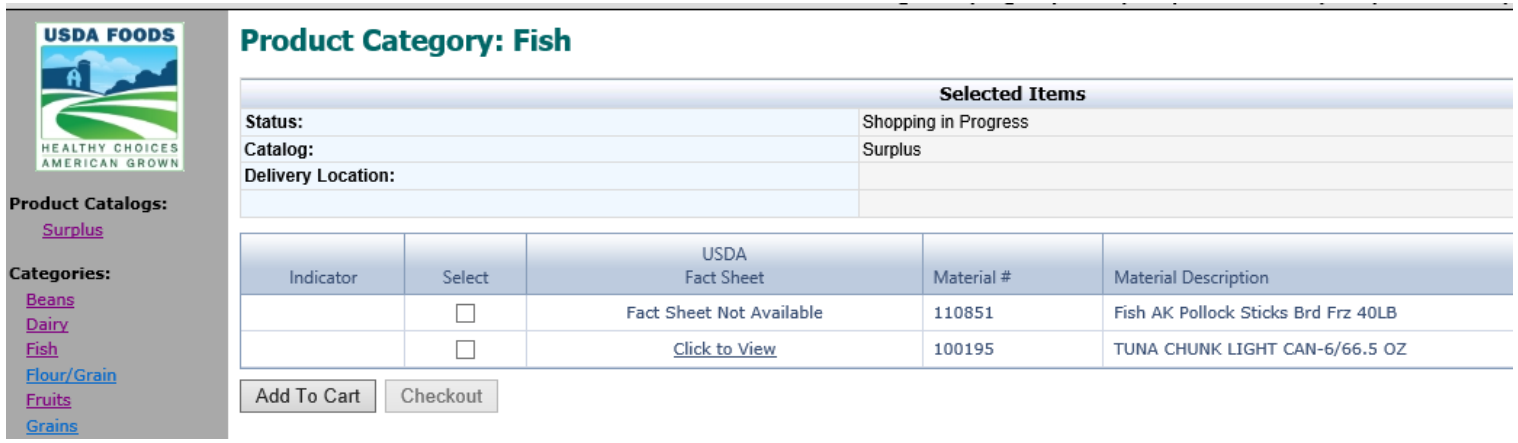
Selecting Materials

Selecting Materials

- An RA should only request materials that they can receive the following week (next available delivery date – for schools in northern Arizona the delivery frequency may be bi-weekly)
- An RA should only request materials they can use in a timely manner
- An RA will use entitlement for requested materials unless no remaining entitlement is available – the requested materials are then "bonus"
- An RA should request enough materials to meet minimum case requirements if no other materials will be scheduled

Selecting Materials

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

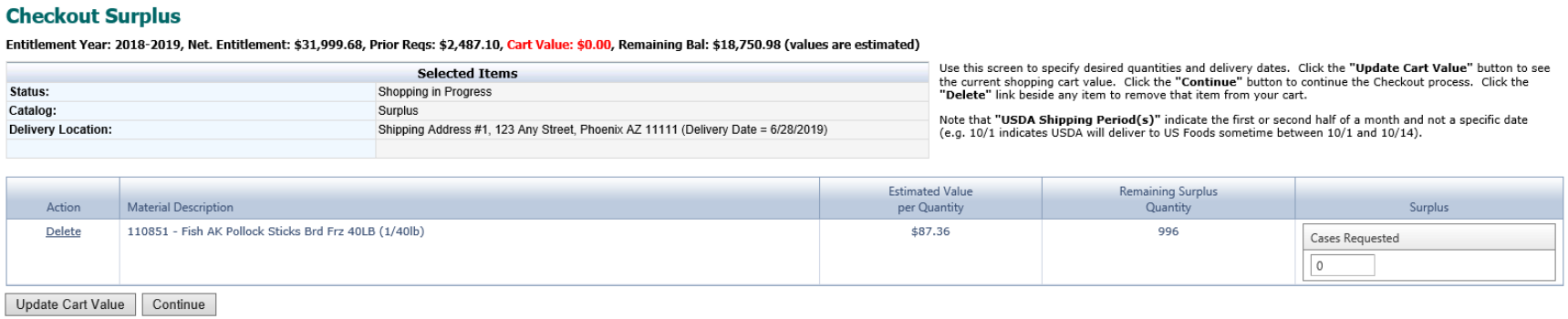


3. Once a material has been added to the cart, you may click on other categories and add additional materials to the cart. Only ONE Surplus Catalog requisition can be submitted per day.

Selecting Materials

4. Click Checkout.

5. Note the materials listed. If a material appears in the Checkout screen that you do not want, click Delete next to that material. If you forgot to add a material at this point, you can click back on a category and select another material to add to the cart, then Click Checkout again.



Checkout Surplus

Entitlement Year: 2018-2019, Net. Entitlement: $31,999.68, Prior Reqs: $2,487.10, Cart Value: $0.00, Remaining Bal: $18,750.98 (values are estimated)

Selected Items	
Status:	Shopping in Progress
Catalog:	Surplus
Delivery Location:	Shipping Address #1, 123 Any Street, Phoenix AZ 11111 (Delivery Date = 6/28/2019)

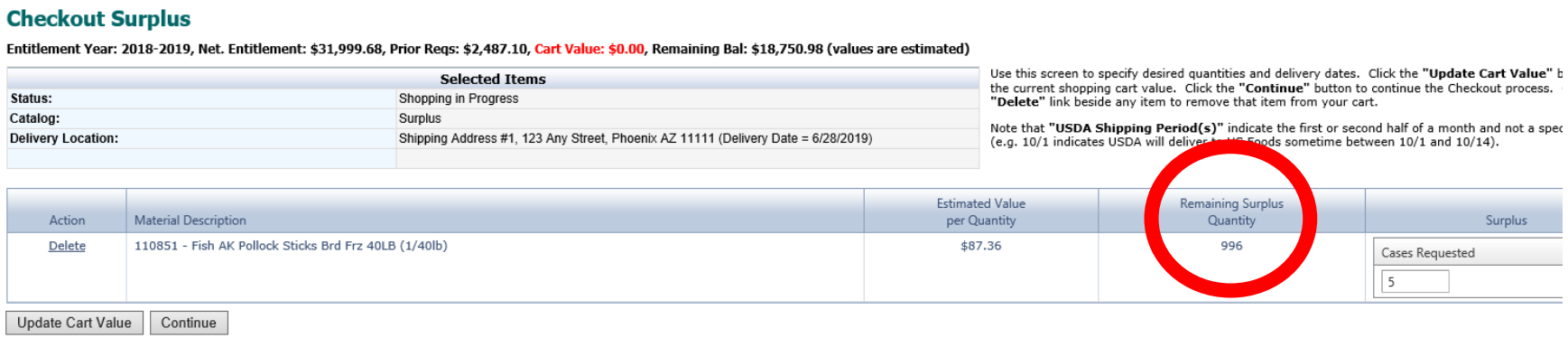
Use this screen to specify desired quantities and delivery dates. Click the **"Update Cart Value"** button to see the current shopping cart value. Click the **"Continue"** button to continue the Checkout process. Click the **"Delete"** link beside any item to remove that item from your cart.

Note that **"USDA Shipping Period(s)"** indicate the first or second half of a month and not a specific date (e.g. 10/1 indicates USDA will deliver to US Foods sometime between 10/1 and 10/14).

Action	Material Description	Estimated Value per Quantity	Remaining Surplus Quantity	Surplus
Delete	110851 - Fish AK Pollock Sticks Brd Frz 40LB (1/40lb)	$87.36	996	Cases Requested: 0

Update Cart Value | Continue

Selecting Materials



Checkout Surplus

Entitlement Year: 2018-2019, Net. Entitlement: $31,999.68, Prior Reqs: $2,487.10, Cart Value: $0.00, Remaining Bal: $18,750.98 (values are estimated)

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"Delete" link beside any item to remove that item from your cart.

Note that **"USDA Shipping Period(s)"** indicate the first or second half of a month and not a spec
(e.g. 10/1 indicates USDA will deliver to US Foods sometime between 10/1 and 10/14).

Action	Material Description	Estimated Value per Quantity	Remaining Surplus Quantity	Surplus
Delete	110851 - Fish AK Pollock Sticks Brd Frz 40LB (1/40lb)	$87.36	996	Cases Requested: 5

Update Cart Value | Continue

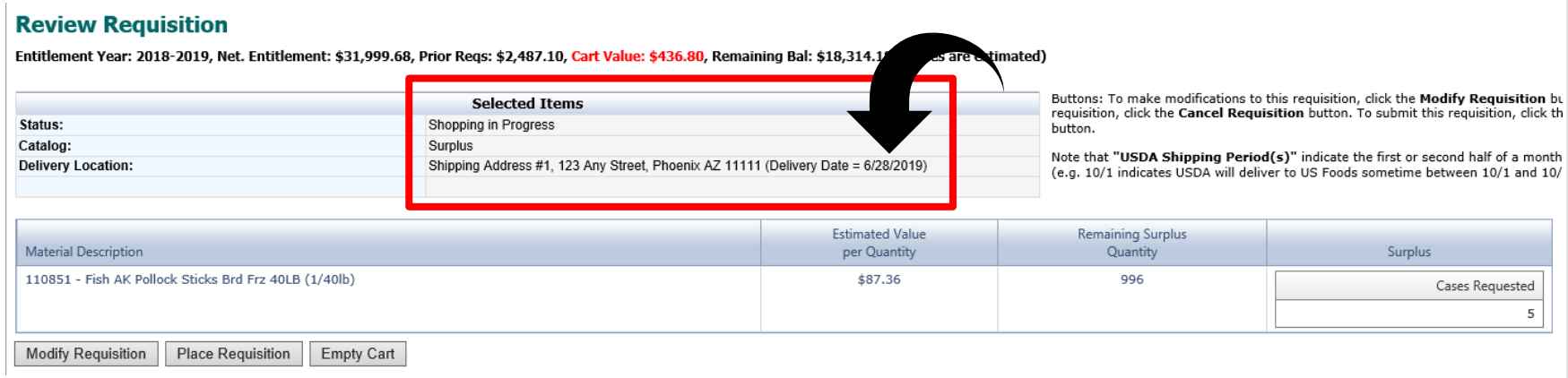
6. Based on the Remaining Surplus Quantity, enter a case quantity you can use in a timely manner (within one month). Do not request more than you can use or store.

7. If you do not have materials currently in the Available Materials list, make sure you are requesting enough cases to meet your minimum case requirement.

8. Click Update Cart Value. Remember, if you have remaining entitlement you will be charged this amount. If you do not have remaining entitlement, this value is bonus.

9. You can place a Surplus Catalog requisition even if you are out of remaining entitlement.

Selecting Materials



Review Requisition

Entitlement Year: 2018-2019, Net. Entitlement: $31,999.68, Prior Reqs: $2,487.10, Cart Value: $436.80, Remaining Bal: $18,314.1

	Selected Items
Status:	Shopping in Progress
Catalog:	Surplus
Delivery Location:	Shipping Address #1, 123 Any Street, Phoenix AZ 11111 (Delivery Date = 6/28/2019)

Buttons: To make modifications to this requisition, click the **Modify Requisition** bu
requisition, click the **Cancel Requisition** button. To submit this requisition, click th
button.

Note that **"USDA Shipping Period(s)"** indicate the first or second half of a month
(e.g. 10/1 indicates USDA will deliver to US Foods sometime between 10/1 and 10/

Material Description	Estimated Value per Quantity	Remaining Surplus Quantity	Surplus
110851 - Fish AK Pollock Sticks Brd Frz 40LB (1/40lb)	$87.36	996	Cases Requested: 5

Modify Requisition | Place Requisition | Empty Cart

10. Look at the Selected Items section.
11. Does the Delivery Date listed meet your needs? Once the requisition is processed and the requested materials are scheduled for shipment, you CANNOT make changes to the quantities or delivery date.
12. Will someone be onsite that day? Please consider your holiday breaks and school closures when placing Surplus requisitions as you will be charged a re-stocking fee for all cases if someone is not there to receive the shipment.

Comprehension Check

True or False: Since I do not have any remaining entitlement I should request as many cases off the Surplus Catalog as I possibly can.

Comprehension Check

False. An RA should only request a quantity in which they can successfully use within a month. The USDA Foods Program monitors requests and has the discretion to reduce quantities when deemed more than can be used in a month.

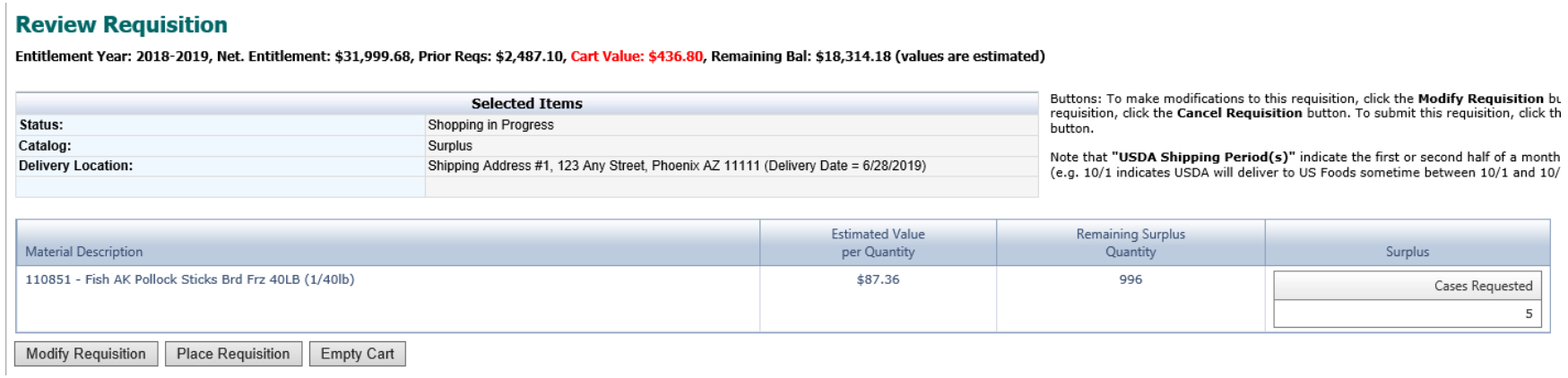
Placing a Requisition

Placing a Requisition

Placing a Requisition

- An RA should not leave Surplus materials in the cart. As the Remaining Surplus Quantity may no longer be available when the requisition is finally placed
- Once a Surplus Catalog requisition is placed, the USDA Foods program will complete the request and schedule the materials for shipment on your next available delivery day. This is displayed in the Selected Items section
- You may NOT edit a requisition or scheduled Surplus shipment once it has been placed
- You may only place one Surplus Catalog requisition a day

Placing a Requisition



Review Requisition

Entitlement Year: 2018-2019, Net. Entitlement: $31,999.68, Prior Reqs: $2,487.10, Cart Value: $436.80, Remaining Bal: $18,314.18 (values are estimated)

Selected Items	
Status:	Shopping in Progress
Catalog:	Surplus
Delivery Location:	Shipping Address #1, 123 Any Street, Phoenix AZ 11111 (Delivery Date = 6/28/2019)

Buttons: To make modifications to this requisition, click the **Modify Requisition** bu
requisition, click the **Cancel Requisition** button. To submit this requisition, click th
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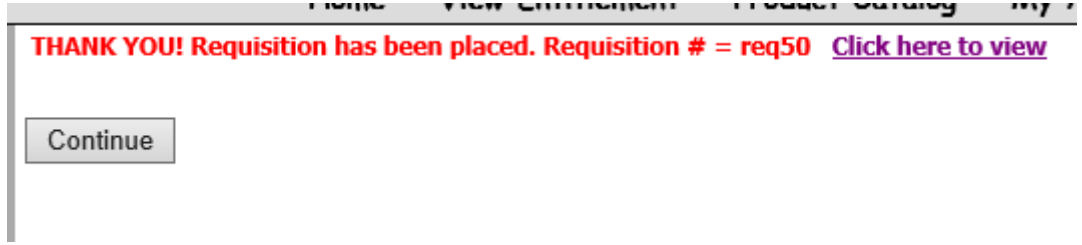
Note that **"USDA Shipping Period(s)"** indicate the first or second half of a month
(e.g. 10/1 indicates USDA will deliver to US Foods sometime between 10/1 and 10/

Material Description	Estimated Value per Quantity	Remaining Surplus Quantity	Surplus
110851 - Fish AK Pollock Sticks Brd Frz 40LB (1/40lb)	$87.36	996	Cases Requested: 5

Modify Requisition | Place Requisition | Empty Cart

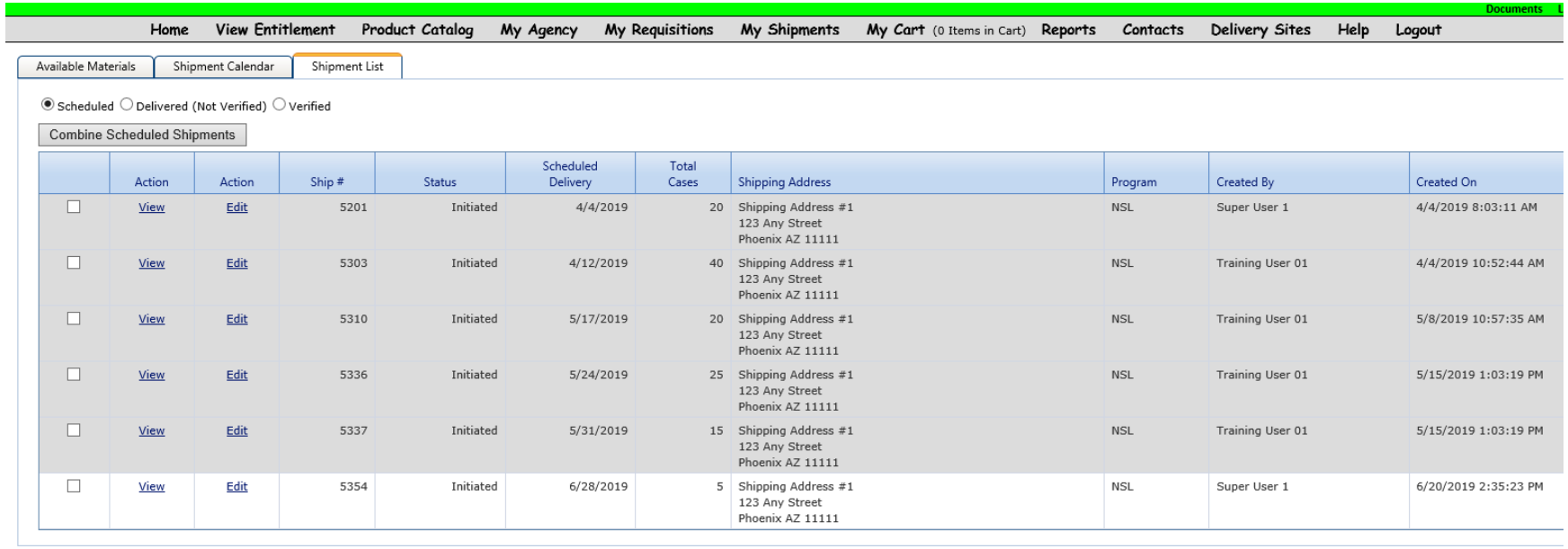
1. Click Place Requisition.
2. An email was sent to the user whom is logged in and placed the requisition.



THANK YOU! Requisition has been placed. Requisition # = req50 Click here to view

Continue

Placing a Requisition



	Action	Action	Ship #	Status	Scheduled Delivery	Total Cases	Shipping Address	Program	Created By	Created On
☐	View	Edit	5201	Initiated	4/4/2019	20	Shipping Address #1 123 Any Street Phoenix AZ 11111	NSL	Super User 1	4/4/2019 8:03:11 AM
☐	View	Edit	5303	Initiated	4/12/2019	40	Shipping Address #1 123 Any Street Phoenix AZ 11111	NSL	Training User 01	4/4/2019 10:52:44 AM
☐	View	Edit	5310	Initiated	5/17/2019	20	Shipping Address #1 123 Any Street Phoenix AZ 11111	NSL	Training User 01	5/8/2019 10:57:35 AM
☐	View	Edit	5336	Initiated	5/24/2019	25	Shipping Address #1 123 Any Street Phoenix AZ 11111	NSL	Training User 01	5/15/2019 1:03:19 PM
☐	View	Edit	5337	Initiated	5/31/2019	15	Shipping Address #1 123 Any Street Phoenix AZ 11111	NSL	Training User 01	5/15/2019 1:03:19 PM
☐	View	Edit	5354	Initiated	6/28/2019	5	Shipping Address #1 123 Any Street Phoenix AZ 11111	NSL	Super User 1	6/20/2019 2:35:23 PM

3. The USDA Foods program will process your requisition and create a shipment.
4. Click My Shipments, Shipment List tab, Scheduled shipments.
5. Ship # 5354 is the Surplus Catalog requisition that was placed.
6. If a shipment is created for your Surplus Catalog requisition, it will combine with other shipments listed for the same delivery date and site.

Questions and Answers

Questions and Answers

Can I change the date of my scheduled shipment that was created when my Surplus Catalog requisition was processed?

- No, the Surplus Catalog allows the USDA Foods Program to move inventory from the warehouse to RAs to avoid being charged excess storage fees. If shipment dates are changed to a later date, the USDA Foods Program is in jeopardy of receiving an excess storage fee invoice from the warehouse.

Can I Create Surplus Catalog Requisitions even if I do not have any remaining entitlement?

- Yes, the Surplus Catalog allows the USDA Foods Program to move inventory from the warehouse to RAs to avoid being charged excess storage fees. If you do have remaining entitlement, you will pay for the cases you request.

Technical Assistance

If you have any questions about Surplus Catalog Requisitions, use:

- The myFOODS System Manual at: https://www.azed.gov/sites/default/files/2019/05/myFOODS%20Training%20Manual_2018%20SY19.pdf?id=5cf00b231dcb250954d3c2ab

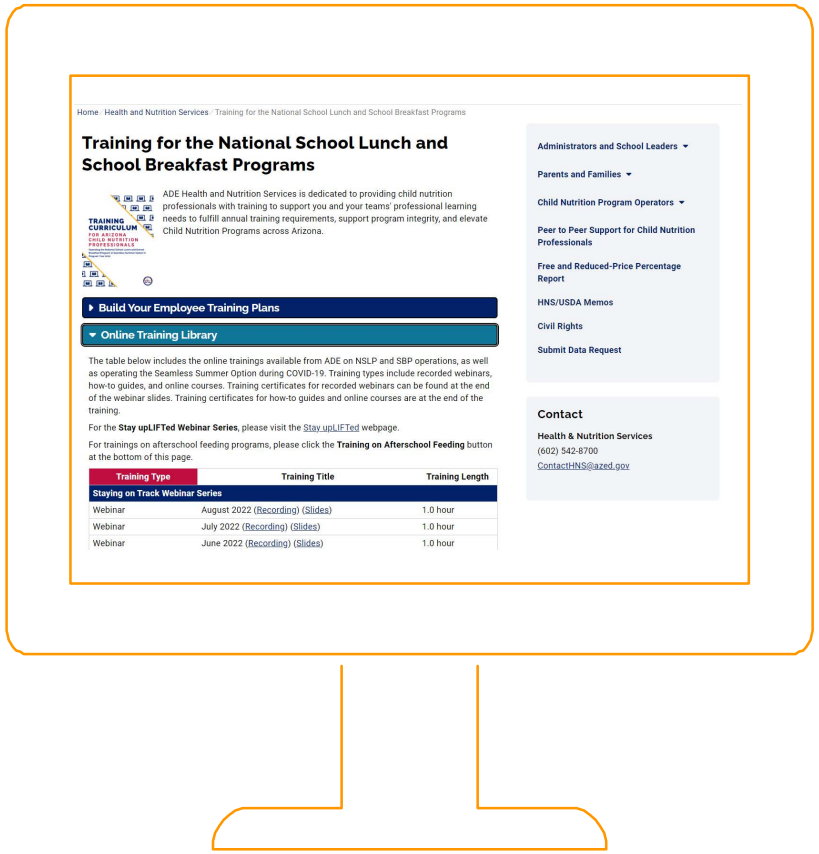
For other questions about Surplus Catalog Requisitions, please contact your USDA Foods Program.

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 [ADE Online Training Library](#) to review additional resources.



Home / Health and Nutrition Services / Training for the National School Lunch and School Breakfast Programs

Training for the National School Lunch and School Breakfast Programs

ADE Health and Nutrition Services is dedicated to providing child nutrition professionals with training to support you and your teams' professional learning needs to fulfill annual training requirements, support program integrity, and elevate Child Nutrition Programs across Arizona.

Administrators and School Leaders
Parents and Families
Child Nutrition Program Operators
Peer to Peer Support for Child Nutrition Professionals
Free and Reduced-Price Percentage Report
HNS/USDA Memos
Civil Rights
Submit Data Request

Build Your Employee Training Plans

Online Training Library

The table below includes the online trainings available from ADE on NSLP and SBP operations, as well as operating the Seamless Summer Option during COVID-19. Training types include recorded webinars, how-to guides, and online courses. Training certificates for recorded webinars can be found at the end of the webinar slides. Training certificates for how-to guides and online courses are at the end of the training.

For the **Stay upLIFTed Webinar Series**, please visit the Stay upLIFTed webpage.

For trainings on afterschool feeding programs, please click the **Training on Afterschool Feeding** button at the bottom of this page.

Training Type	Training Title	Training Length
Staying on Track Webinar Series		
Webinar	August 2022 (Recording) (Slides)	1.0 hour
Webinar	July 2022 (Recording) (Slides)	1.0 hour
Webinar	June 2022 (Recording) (Slides)	1.0 hour

Contact

Health & Nutrition Services
(602) 542-8700
ContactHNS@azed.gov

End of Training

Congratulations!

You have completed the ***Step by Step Instruction: How to Create a Surplus 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 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.*

Request a Certificate

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, ADE will create a certificate of completion and email it to you within 10 business days.

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 Surplus Catalog Requisition***

Professional Standards Learning Code: ***1170***

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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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