

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

Professional Standards Learning Code 1170
Length: 30 minutes



Revised August 2022

"How to Create a Processing 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 Processing
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 raw bulk USDA Foods for the following School Year.
- The following slides provide guidance on how to create a Processing Catalog Requisition and the follow-up steps.

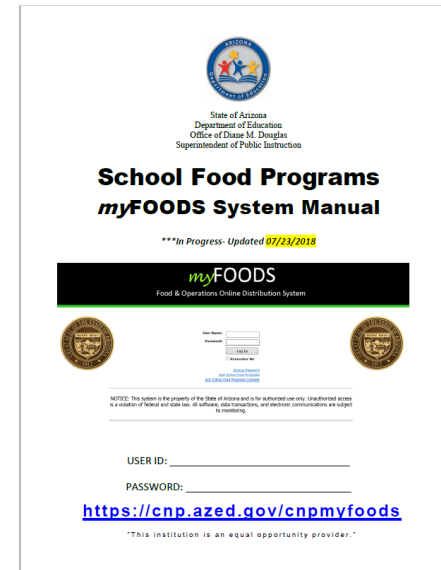
Step by Step Instruction: How to Create a Processing Catalog Requisition

Objectives

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

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

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



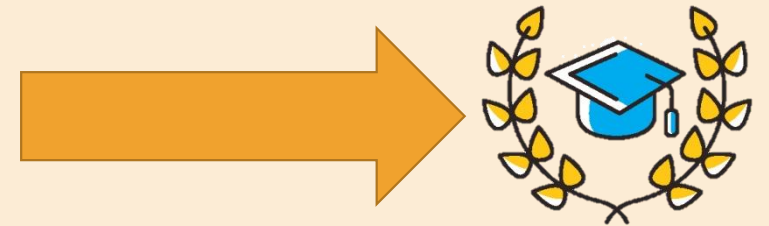
The instruction within this How-To-Guide is based on the [myFOODs system manual](https://cnp.azed.gov/cnpmyfoods).

- Section: Product Catalogs (pages 6-8)

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.



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

Definitions

Processing Catalog: A list of available raw bulk USDA Foods in which an RA can request raw pounds be sent to a processor up to their entitlement limit.

Processing Catalog Requisition: A request submitted through myFOODS to purchase pounds of raw bulk USDA Foods on behalf of the RA using the RA's available entitlement.

Processing: To contract with commercial food processors to convert raw bulk USDA Foods into more convenient, ready-to-use end products.

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

The Step by Step Instruction will review:

Processing Catalog	Slides 8-11
Selecting Materials	Slides 13-18
Placing a Requisition	Slides 19-24
Follow-up Steps	Slides 25-27

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

Processing Catalog

Processing Catalog

Processing Catalog

- An RA requests raw bulk USDA Foods from the catalog to be received and used in the next school year
- Catalog is available February – March
- Requisitions are processed in March and orders are placed with USDA in April
- ADE will announce completed/purchased requisitions
- View “Processor/Material/RA Detail Report” in myFOODS

Processing Catalog

Training Agency 01
Status = Active
Welcome Training User 01

Home View Entitlement Product Catalog My Agen

USDA FOODS
HEALTHY CHOICES
AMERICAN GROWN

Product Catalogs:
[Processing Diversion](#)

Product Catalog: None
To begin the process of requesting materials, select a product catalog from the list of materials.

Deadlines for Requesting Materials:
▶ : 06/30/2019 is the deadline for requesting the following "Processing Diversion" materials.

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 Processing Diversion.

Processing Catalog

Training Agency 01
Status = Active
Welcome Training User 01

Home View Entitlement Product Catalog

USDA FOODS
HEALTHY CHOICES
AMERICAN GROWN

Product Catalogs:
[Processing Diversion](#)

Categories:
[Dairy](#)
[Meat](#)
[Peanut/Oil/Sunflower](#)
[Poultry](#)

Product Catalog: Processing Diversion
To begin the process of requesting materials, select a product catalog from the materials.

Processing Diversion Deadlines for Requesting Materials:
: 06/30/2019 is the deadline for requesting the following "Processing Diversion"

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).

Home View Entitlement Product Catalog My Agency

USDA FOODS
HEALTHY CHOICES
AMERICAN GROWN

Product Catalogs:
[Processing Diversion](#)

Categories:
[Dairy](#)
[Meat](#)
[Peanut/Oil/Sunflower](#)

Product Catalog: Processing Diversion
To begin the process of requesting materials, select a product catalog from the materials.

Processing Diversion Deadlines for Requesting Materials:
: 06/30/2019 is the deadline for requesting the following "Processing Diversion"

BEEF COARSE GROUND FRZ CTN-60 LB (100154)
CHEESE MOZ LM PT SKM UNFZ PROC PK(41125) (110244)
CHICKEN LARGE CHILLED -BULK (100103)
PEANUT BUTTER SMOOTH DRUM-500 LB (100397)

Comprehension Check

True or False: A Processing Diversion catalog requisition is a request for USDA Foods that are ready-to-eat.



Comprehension Check

False. The raw bulk USDA Foods requested must be sent to a contracted processor and converted into more convenient, ready-to-use end products.



Selecting Materials


Selecting Materials

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
- When creating requisitions for one material and two processors, an RA must create two separate requisitions (RA can only select one processor per material)
- An RA is required to enter an amount of 300lbs or more for each material they would like to divert to a processor (utilizing one material for a number of different end products will help meet this requirement)

Selecting Materials

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



Product Catalogs:
[Processing Diversion](#)

Categories:
[Dairy](#)
[Meat](#)
[Peanut/Oil/Sunflower](#)
[Poultry](#)

Product Category: Meat

Selected Items				
Status:	Shopping in Progress			
Catalog:	Processing Diversion			


Indicator	Select	USDA Fact Sheet	Material #	Material Description
	<input checked="" type="checkbox"/>	Fact Sheet Not Available	100154	BEEF COARSE GROUND FRZ CTN-60 LB

Add To CartCheckout

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.

Selecting Materials

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



Product Catalogs:
[Processing Diversion](#)

Categories:
[Dairy](#)
[Meat](#)
[Peanut/Oil/Sunflower](#)
[Poultry](#)

Product Category: Meat

Selected Items				
Status:	Shopping in Progress			
Catalog:	Processing Diversion			

Indicator	Select	USDA Fact Sheet	Material #	Material Description
	<input checked="" type="checkbox"/>	Fact Sheet Not Available	100154	BEEF COARSE GROUND FRZ CTN-60 LB

Add To CartCheckout

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.

Selecting Materials

- 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.

Checkout Processing Diversion

Entitlement Year: 2019-2020, Net. Entitlement: \$31,999.68, Prior Reqs: \$1,922.40, **Cart Value: \$0.00**, Remaining Bal: \$30,077.28 (values are estimated)

Selected Items	
Status:	Shopping in Progress
Catalog:	Processing Diversion

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	Processor	Estimated Value per Quantity	Quantities						
Delete	100154 - BEEF COARSE GROUND FRZ CTN-60 LB (1/60# CTN)	Please select a processor...	\$2.22	<table><thead><tr><th>Pounds</th><th>Total Shipment Cost</th></tr></thead><tbody><tr><td><input type="text" value="0"/></td><td>\$0.00</td></tr><tr><td colspan="2">Material Total: \$0.00</td></tr></tbody></table>	Pounds	Total Shipment Cost	<input type="text" value="0"/>	\$0.00	Material Total: \$0.00	
Pounds	Total Shipment Cost									
<input type="text" value="0"/>	\$0.00									
Material Total: \$0.00										
Delete	100103 - CHICKEN LARGE CHILLED -BULK (40 lb avg)	Please select a processor...	\$0.93	<table><thead><tr><th>Pounds</th><th>Total Shipment Cost</th></tr></thead><tbody><tr><td><input type="text" value="0"/></td><td>\$0.00</td></tr><tr><td colspan="2">Material Total: \$0.00</td></tr></tbody></table>	Pounds	Total Shipment Cost	<input type="text" value="0"/>	\$0.00	Material Total: \$0.00	
Pounds	Total Shipment Cost									
<input type="text" value="0"/>	\$0.00									
Material Total: \$0.00										
Delete	100397 - PEANUT BUTTER SMOOTH DRUM-500 LB (40# UNITS)	Please select a processor...	\$0.84	<table><thead><tr><th>Pounds</th><th>Total Shipment Cost</th></tr></thead><tbody><tr><td><input type="text" value="0"/></td><td>\$0.00</td></tr><tr><td colspan="2">Material Total: \$0.00</td></tr></tbody></table>	Pounds	Total Shipment Cost	<input type="text" value="0"/>	\$0.00	Material Total: \$0.00	
Pounds	Total Shipment Cost									
<input type="text" value="0"/>	\$0.00									
Material Total: \$0.00										

Update Cart Value

Continue

Checkout Processing Diversion

Entitlement Year: 2019-2020, Net. Entitlement: \$31,999.68, Prior Reqs: \$1,922.40, **Cart Value: \$0.00**, Remaining Bal: \$30,077.28 (values are estimated)

Selected Items	
Status:	Shopping in Progress
Catalog:	Processing Diversion

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	Processor	Estimated Value per Quantity	Quantities	
Delete	100154 - BEEF COARSE GROUND FRZ CTN-60 LB (1/60# CTN)	JTM PROVISIONS INC	\$2.22	Pounds	Total Shipment Cost
				<input type="text" value="5,000"/>	\$0.00
				Material Total:	\$0.00
Delete	100103 - CHICKEN LARGE CHILLED -BULK (40 lb avg)	ASIAN FOOD SOLUTIONS	\$0.93	Pounds	Total Shipment Cost
				<input type="text" value="3,500"/>	\$0.00
				Material Total:	\$0.00
Delete	100397 - PEANUT BUTTER SMOOTH DRUM-500 LB (40# UNITS)	Please select a processor...	\$0.84	Pounds	Total Shipment Cost
				<input type="text" value="300"/>	\$0.00
				Material Total:	\$0.00

[Update Cart Value](#) [Continue](#)

Selecting Materials

- An RA must select a processor from the drop down – remember, you can only select one processor per material. If you need to send the same material to a different processor, you must complete another requisition.
- Enter a pound quantity of 300 or more.

This information is from the completion of the planners located in the "Documents" link in myFOODS. Each planner helps you identify the end products you will need for your menu next year, how many cases (based on servings and frequency), and how many pounds you will need.

Comprehension Check

True or False: An RA can place a Brown Box and a Processing Diversion catalog requisition on one request and expect the USDA Foods and End Products to arrive at the warehouse at the same time.



Comprehension Check

False. An RA must place separate requisitions for each product catalog type.



Placing a Requisition

Placing a Requisition

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

Checkout Processing Diversion

Entitlement Year: 2019-2020, Net. Entitlement: \$31,999.68, Prior Reqs: \$1,922.40, **Cart Value: \$0.00**, Remaining Bal: \$30,077.28 (values are estimated)

Selected Items	
Status:	Shopping in Progress
Catalog:	Processing Diversion

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	Processor	Estimated Value per Quantity	Quantities	
Delete	100154 - BEEF COARSE GROUND FRZ CTN-60 LB (1/60# CTN)	JTM PROVISIONS INC	\$2.22	Pounds	Total Shipment Cost
				<input type="text" value="5,000"/>	\$0.00
				Material Total:	\$0.00
Delete	100103 - CHICKEN LARGE CHILLED -BULK (40 lb avg)	ASIAN FOOD SOLUTIONS	\$0.93	Pounds	Total Shipment Cost
				<input type="text" value="3,500"/>	\$0.00
				Material Total:	\$0.00
Delete	100397 - PEANUT BUTTER SMOOTH DRUM-500 LB (40# UNITS)	Please select a processor...	\$0.84	Pounds	Total Shipment Cost
				<input type="text" value="300"/>	\$0.00
				Material Total:	\$0.00

[Update Cart Value](#) [Continue](#)

Placing a Requisition

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

Placing a Requisition

Review Requisition

Entitlement Year: 2019-2020, Net. Entitlement: \$31,999.68, Prior Reqs: \$1,922.40, **Cart Value: \$14,647.53**, Remaining Bal: \$15,429.75 (values are estimated)

Selected Items	
Status:	Shopping in Progress
Catalog:	Processing Diversion

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

Note that "USDA Shipping Period(s)" indicate the first or second half of a month and year (e.g. 10/1 indicates USDA will deliver to US Foods sometime between 10/1 and 10/14)

Material Description	Processor	Estimated Value per Quantity	Quantities	
100154 - BEEF COARSE GROUND FRZ CTN-60 LB (1/60# CTN) One Truckload = 0 Pounds	JTM PROVISIONS INC	\$2.22	Pounds	Total Shipment Cost
			5000	\$11,124.00
			Mat'l Total:	\$11,124.00
100103 - CHICKEN LARGE CHILLED -BULK (40 lb avg) One Truckload = 0 Pounds	ASIAN FOOD SOLUTIONS	\$0.93	Pounds	Total Shipment Cost
			3500	\$3,270.75
			Mat'l Total:	\$3,270.75
100397 - PEANUT BUTTER SMOOTH DRUM-500 LB (40# UNITS) One Truckload = 0 Pounds	TYSON FOODS INC	\$0.84	Pounds	Total Shipment Cost
			300	\$252.78
			Mat'l Total:	\$252.78

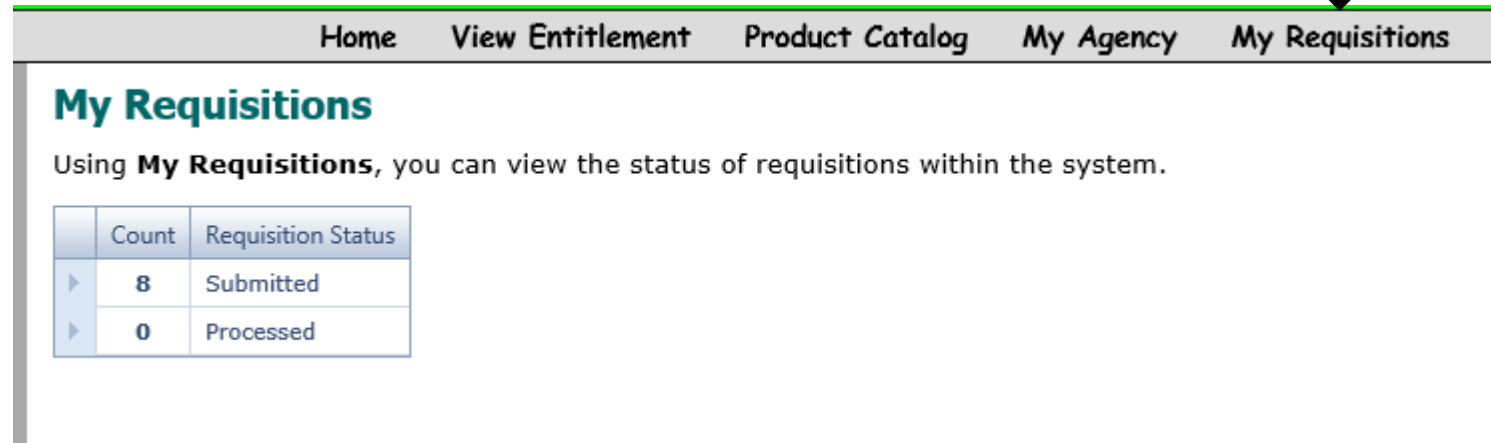
[Modify Requisition](#) [Place Requisition](#) [Empty Cart](#)

- 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 pound quantity.
- 6. Click Place Requisition.

Placing a Requisition




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



Placing a Requisition

My Requisitions

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



Count			Requisition Status			
10			Submitted			
Action	Action	Requisition #	Catalog	Estimated Value	Created On	Created By
View	Closed	req2	Brown Box	\$277.00	4/4/2019 10:11:09 AM	Training User 01
View	Closed	req13	Surplus	\$266.60	4/4/2019 10:45:53 AM	Training User 01
View	Closed	req24	Brown Box	\$277.00	5/8/2019 10:37:13 AM	Training User 01
View	Closed	req26	Surplus	\$919.80	5/8/2019 10:48:46 AM	Training User 01
View	Closed	req28	Brown Box	\$277.00	5/15/2019 11:47:40 AM	Training User 01
View	Closed	req33	Surplus	\$331.20	5/15/2019 12:16:46 PM	Training User 01
View	Closed	req43	Brown Box	\$138.50	5/29/2019 11:46:32 AM	Training User 01
View	Closed	req49	Brown Box	\$222.10	6/20/2019 11:04:14 AM	Training User 01
View	Edit	req51	Processing Diversion	\$1,620.00	6/21/2019 11:23:24 AM	Training User 01
View	Edit	req52	Processing Diversion	\$14,607.00	6/21/2019 12:49:42 PM	Training User 01

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: An RA can only place one Brown Box catalog requisition and one Processing Diversion catalog requisition.



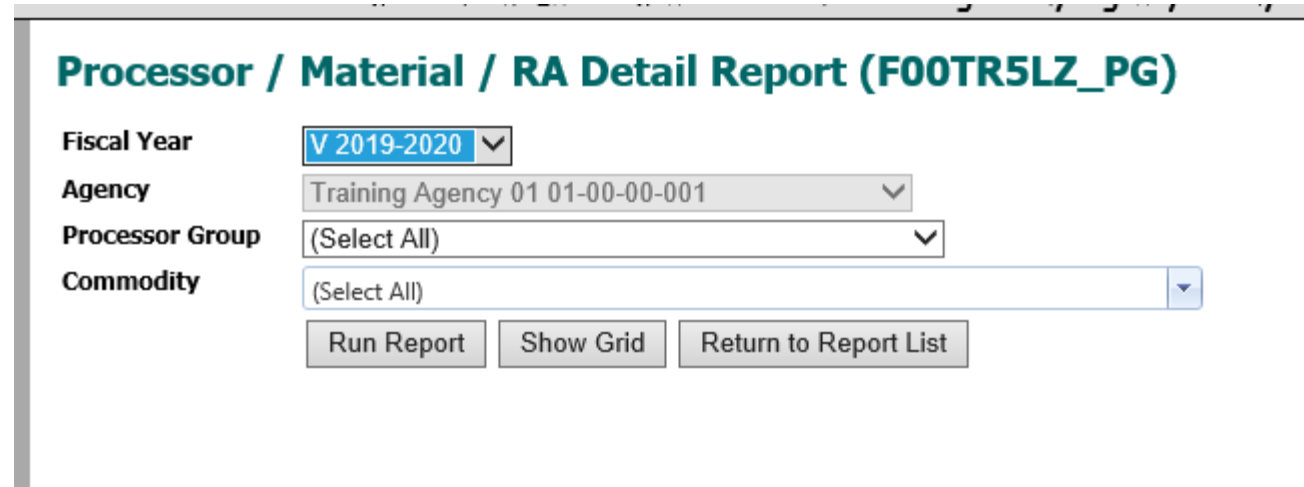
Comprehension Check

False. An RA may place as many requisitions as they would like.



Follow-up Steps

Follow-up Steps



The screenshot shows a web application interface for generating a report. The title is "Processor / Material / RA Detail Report (F00TR5LZ_PG)". Below the title are four dropdown menus for filtering: "Fiscal Year" (set to "V 2019-2020"), "Agency" (set to "Training Agency 01 01-00-00-001"), "Processor Group" (set to "(Select All)"), and "Commodity" (set to "(Select All)"). At the bottom of the form are three buttons: "Run Report", "Show Grid", and "Return to Report List".

Processor / Material / RA Detail Report (F00TR5LZ_PG)

Fiscal Year: V 2019-2020 ▼

Agency: Training Agency 01 01-00-00-001 ▼

Processor Group: (Select All) ▼

Commodity: (Select All) ▼

Run Report Show Grid Return to Report List

If you completed a Processing Diversion Catalog requisition, upon ADE notification of completed Processing Diversion catalog purchases, review the **“Processor/Material/RA Detail Report”** found in myFOODS Reports.

Follow-up Steps

Processor / Material / RA Detail Report (F00TR5LZ_PG)




Fiscal Year

Agency

Processor Group

Commodity

Click the icon in the table/grid header below to export the report data to the desired format.
Then click 'Save' or 'Save As' before clicking 'Open' (i.e. clicking 'Open' first may produce unpredictable results).
When exporting to Excel, you may see a message regarding the data being in a different format; if so, click 'Yes' to continue opening the file.

  					
Processor Group Name	Material Desc	Sales Order Num	Agency Desc	Material Num	Ship
JTM PROVISIONS INC	BEEF COARSE GROUND FRZ CTN-60 LB (100154)		Training Agency 01 (010000001)	100154	6/2:
ASIAN FOOD SOLUTIONS	CHICKEN LARGE CHILLED -BULK (100103)		Training Agency 01 (010000001)	100103	6/2:
TYSON FOODS INC	PEANUT BUTTER SMOOTH DRUM-500 LB (100397)		Training Agency 01 (010000001)	100397	6/2:

Select the upcoming fiscal year and click "Show Grid" (you may export the document to excel).

Questions and Answers

Questions and Answers Format

Once I have been notified to review the report, what do I do?

- Gain access to:
 - www.K12foodservice.com
 - www.Processsolink.com

If I do not gain access to the above listed sites, what happens?

- You will not be able to view and manage your pound balances with each processor. If your pounds are not actively being used, the USDA Foods Program may remove the pounds from your account.

How do I place orders for end-products?

- You complete a planner (found in myFOODS Documents) for the pounds and processors identified on the Processor/Material/RA Detail Report. This planner should be sent to the appropriate broker and distributor.

Communicate with your broker, distributor, and State Agency often.

Technical Assistance

If you have any questions about Processing 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

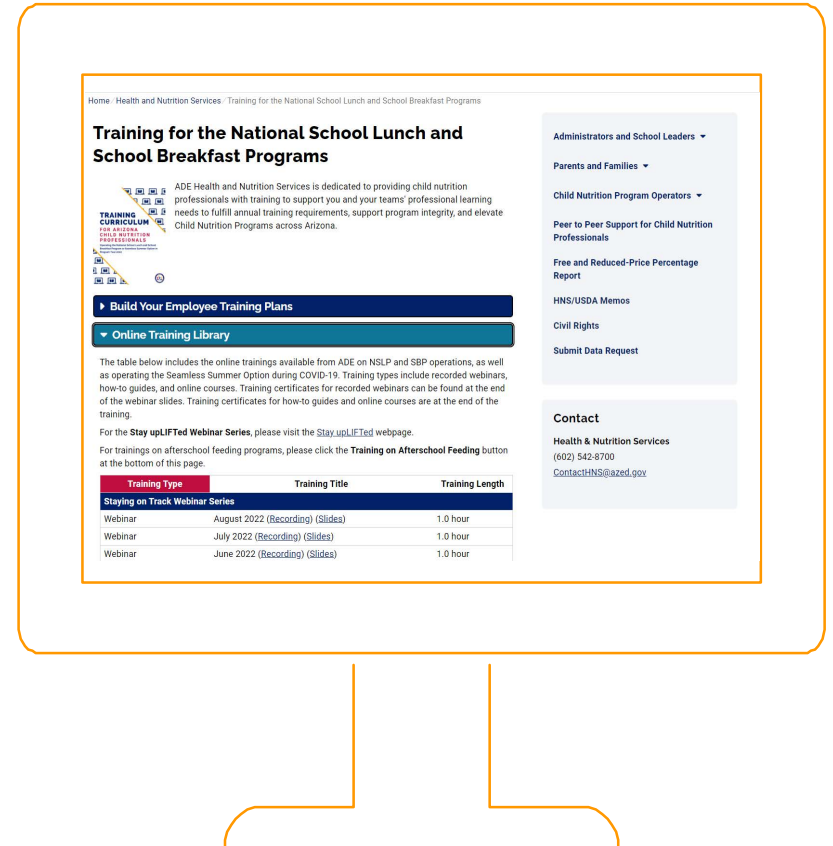
For other questions about Processing Catalog Requisitions, please contact your USDA Foods Program at USDAFoods@azed.gov.

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.



End of Training

Congratulations!

You have completed the ***Step by Step Instruction: How to Create a Processing 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 Processing Catalog Requisition***
 - Learning Code: 1170
 - Key Area: 1000- Nutrition
 - Length: 30 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 Processing 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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