

How to Create a Surplus Catalog Requisition



Health and Nutrition Services
Arizona Department of Education





Disclaimer

This training was developed by the Arizona Department of Education (ADE) Health and Nutrition Services Division (HNS). The content in this training is intended for professionals operating one or more USDA Child Nutrition Programs in Arizona under the direction of ADE. The information in this training is subject to change. Attendees are encouraged to access professional development materials directly from the training library to prevent use of outdated content.

Intended Audience

This training is intended for School Food Authorities (SFAs) in the state of Arizona operating the USDA Foods in Schools Program that are requesting USDA Foods from excess inventory throughout the school year.

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.

TRAINING HOURS

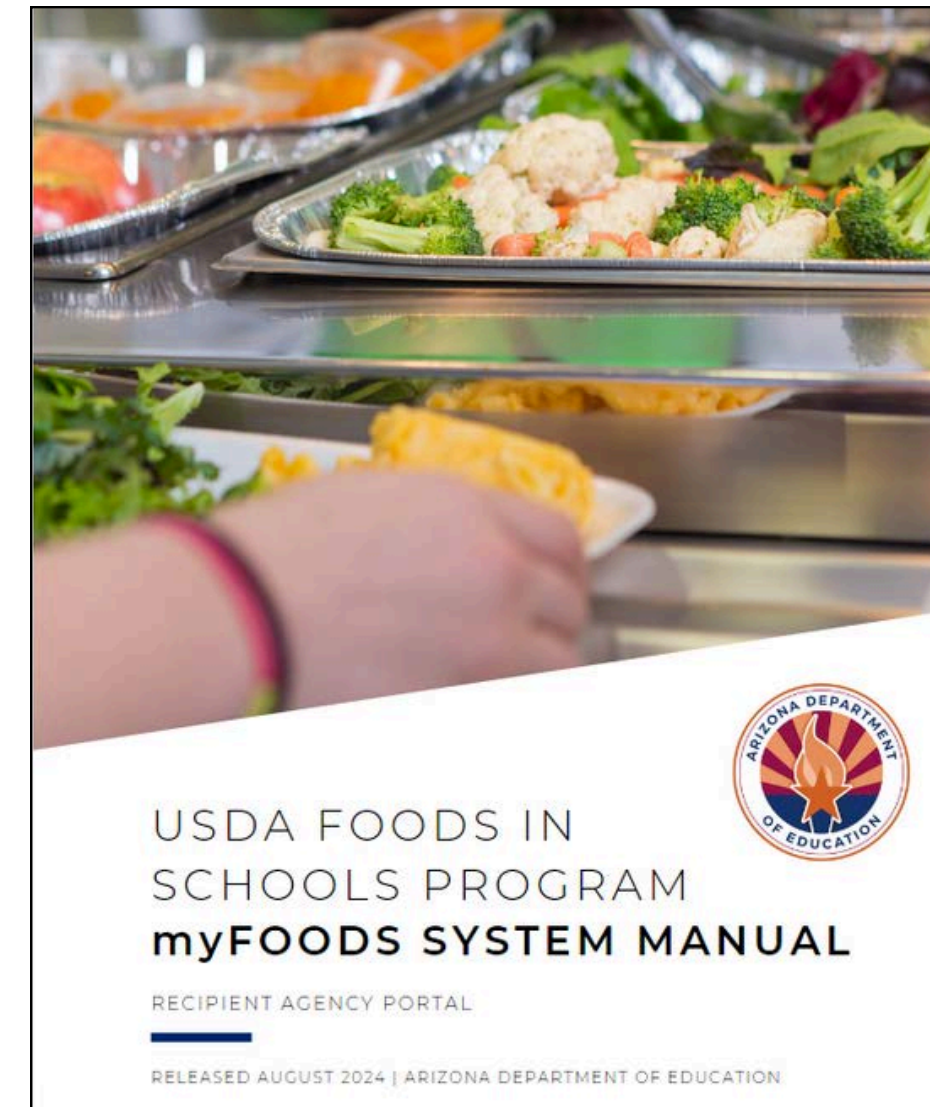
Information to include when documenting this training for Professional Standards:

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

Key Area: 1000 - Nutrition

Learning Code: 1170

Length: 15 minutes



The instruction within this How-To-Guide is based on guidance from the myFOODS System Manual. This manual can be accessed in the Documents section of the myFOODS system.

It is recommended to review the myFOODS system manual in addition to completing this How-To-Guide for complete understanding of the scheduling and verifying shipments process.

Click [here](#) to access the manual.

Quiz Time



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 answers available within the guide.

The question mark icon below will indicate a comprehension quiz question.



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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

SECTION 1



Definitions

**Surplus:**

Excess inventory of Direct Delivery (brown box) foods that was ordered to assist with purchasing full truck loads or declined materials from an SFA on the Available Materials list in myFOODS.

Surplus Catalog:

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

Surplus Catalog Requisition:

An SFA's request submitted through myFOODS to request a case(s) of USDA Foods.

Catalog:

A list of materials grouped by type. There are three catalog types, Surplus, Brown Box, and Processing Diversion

Surplus Catalog

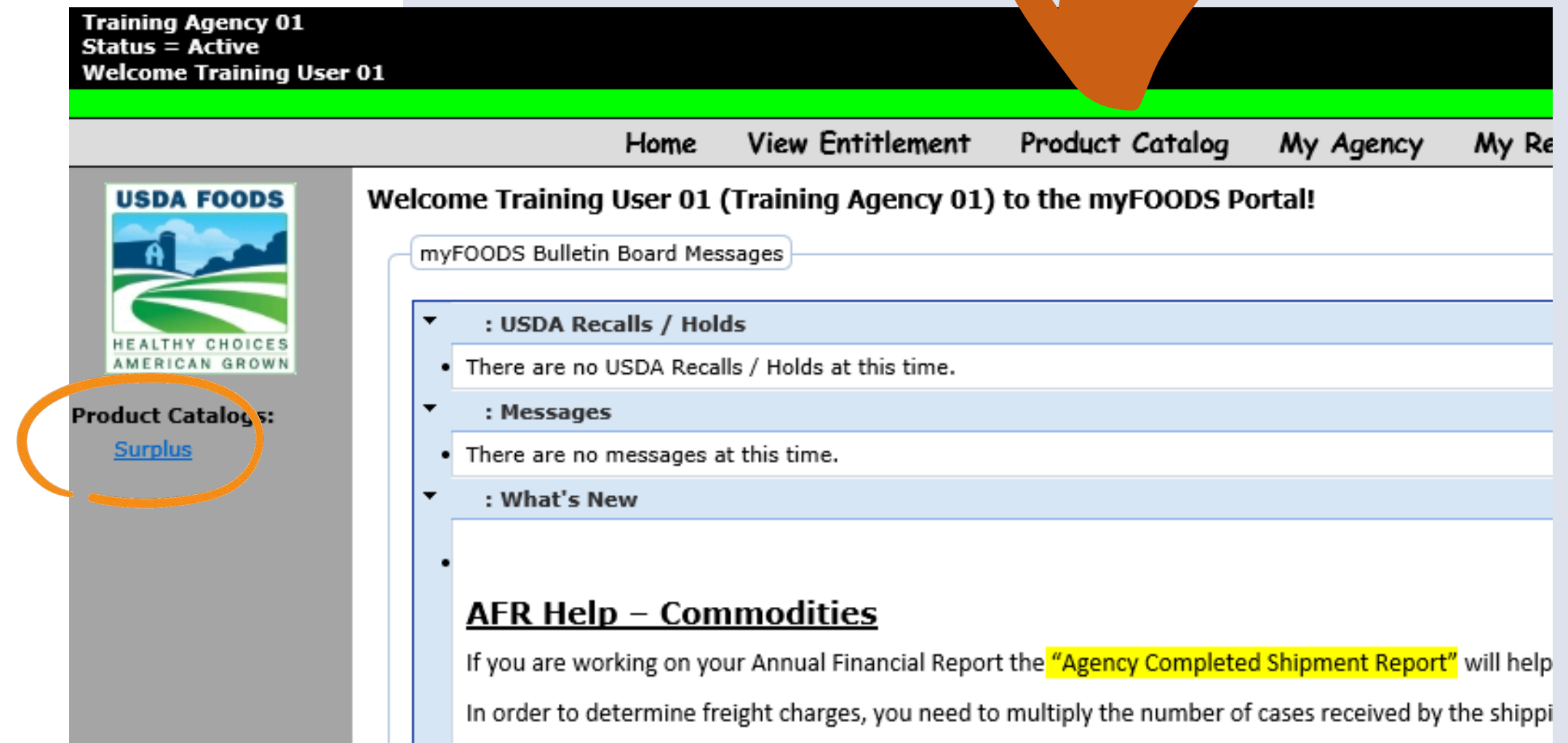
REQUESTING SURPLUS MATERIALS

-  **AN SFA REQUESTS MATERIALS FROM THE SURPLUS CATALOG TO BE RECEIVED ON THE NEXT DELIVERY DATE**
-  **REQUISITION REQUESTS ARE PROCESSED WITHIN 24 HOURS**
-  **WHEN REQUISITIONS ARE PROCESSED, THE MATERIALS ARE SCHEDULED FOR SHIPMENT ON THE NEXT AVAILABLE DELIVERY DATE – CHANGES TO QUANTITIES AND DELIVERY DATES ARE NOT ALLOWED**
-  **VIEW MY SHIPMENTS, SCHEDULED, TO SEE MATERIALS FROM THE SURPLUS REQUISITION REQUEST**

Accessing the Surplus Product Catalog

IN MYFOODS

- Click **Product Catalog**
If a catalog is available, the link will be on the left side of the screen.
- Click **Surplus**



Training Agency 01
Status = Active
Welcome Training User 01

Home View Entitlement Product Catalog My Agency My Re

Welcome Training User 01 (Training Agency 01) to the myFOODS Portal!

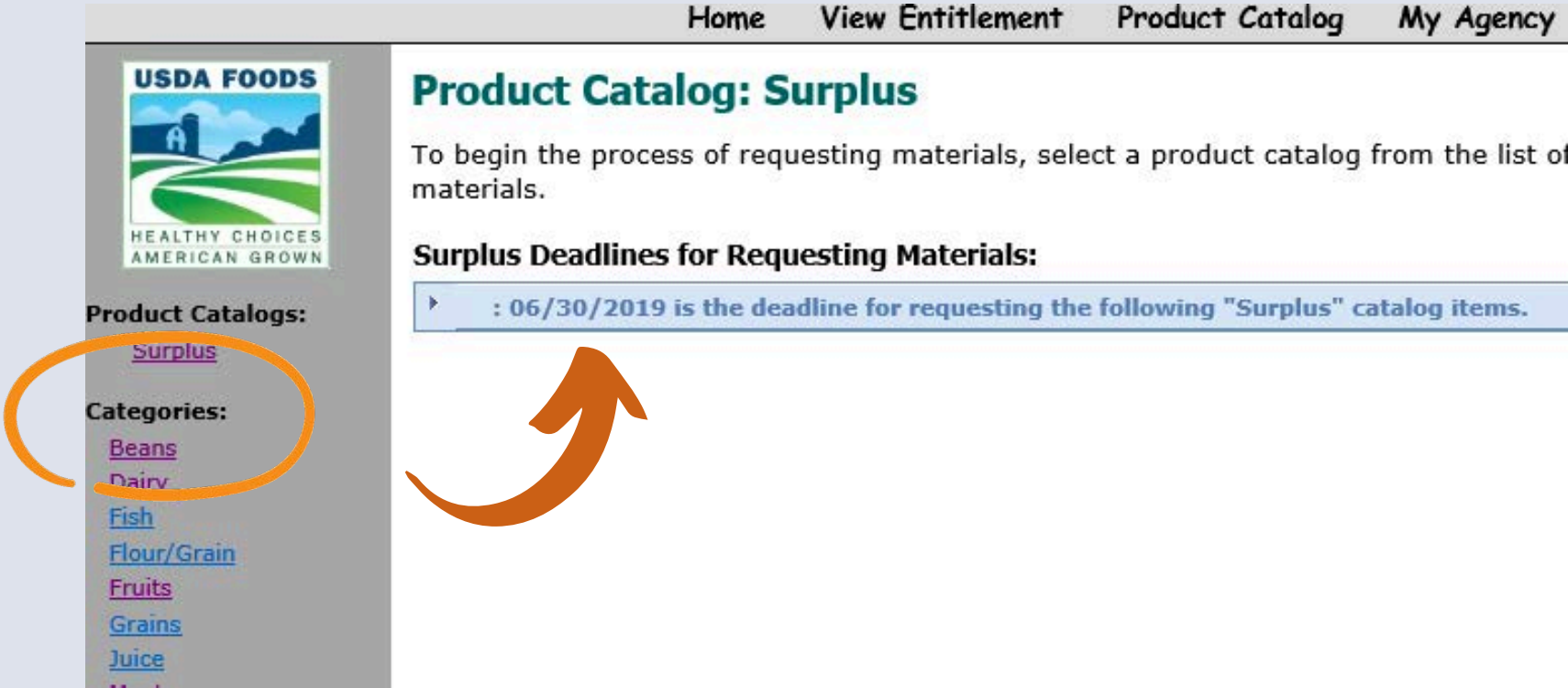
myFOODS Bulletin Board Messages

- ▼ : USDA Recalls / Holds
 - There are no USDA Recalls / Holds at this time.
- ▼ : Messages
 - There are no messages at this time.
- ▼ : What's New
 - **AFR Help – Commodities**
If you are working on your Annual Financial Report the "Agency Completed Shipment Report" will help
In order to determine freight charges, you need to multiply the number of cases received by the shippi

Product Catalog

CATEGORIES

A number of Categories will display. The SFA may click each category to view all the materials available in that category.



AVAILABLE MATERIALS

OR the SFA may click the blue band to expand and display all of the materials available in list form (not by category).



Surplus Deadlines for Requesting Materials:

▼	: 06/30/2019 is the deadline for requesting the following "Surplus" catalog items.
	APPLE SLICES FRZ CTN-12/2.5 LB (110470)
	APPLESAUCE CUP-96/4.5 (110361)
	APPLESAUCE UNSWEETENED CAN-6/10 (110541)
	APRICOT FRZ CUP-96/4.5 OZ (100261)
	APRICOTS DICED PEELED EX LT CAN-6/10 (100216)
	BEANS BLACK TURTLE CAN-6/10 (100359)
	BEANS GARBANZO CAN-6/10 (100360)
	BEANS GREEN CAN-6/10 (100307)
	BEANS GREEN FRZ CTN-30 LB (100351)

Quiz Time

True or False: The Surplus Catalog is a way for an SFA to request USDA Foods when they are out of entitlement.

A True

B False



Quiz Time

True or False: The Surplus Catalog is a way for an SFA to request USDA Foods when they are out of entitlement.

A True

B False

True. ADE must pay excess storage fees to the contracted warehouse when physical inventory sits. The Surplus Catalog allows ADE the ability to move inventory and assist SFAs by providing USDA Foods in the form of a “bonus” entitlement.



Selecting Materials

SECTION 2



Selecting Materials

-  **AN SFA SHOULD ONLY SELECT MATERIALS THAT COULD BE RECEIVED ON THE NEXT AVAILABLE DELIVERY DAY**
-  **AN SFA SHOULD ONLY SELECT MATERIALS THAT CAN BE USED IN A TIMELY MANNER**
-  **AN SFA WILL USE ENTITLEMENT FOR REQUESTED MATERIALS UNLESS NO REMAINING ENTITLEMENT IS AVAILABLE – THE REQUESTED MATERIALS ARE THEN “BONUS”**
-  **AN SFA SHOULD REQUEST ENOUGH MATERIALS TO MEET MINIMUM CASE REQUIREMENTS IF NO OTHER MATERIALS WILL BE SCHEDULED**

USDA FOODS
HEALTHY CHOICES
AMERICAN GROWN

Product Category: Fish

Status: Shopping in Progress
Catalog: Surplus
Delivery Location:

Indicator	Select	USDA Fact Sheet	Material #	Material Description
	☐	Fact Sheet Not Available	110851	Fish AK Pollock Sticks Brd Frz 40LB
	☐	Click to View	100195	TUNA CHUNK LIGHT CAN-6/66.5 OZ

Add To Cart **Checkout**

Material Categories

ADDING TO THE CART

Click on the Category of the material being requested.

Select the desired material and click **Add To Cart**.

Once a material has been added to the cart, the SFA may click on other categories and add additional materials to the cart. SFAs with more than one site may submit multiple catalog requests per day.

Click **Checkout**



If unwanted materials appear in the Checkout screen, click **Delete** next to that material. If a material needs to be added at this point, click back on a category and select another material to add to the cart, then Click **Checkout** again.

Surplus Quantity

Based on the Remaining Surplus Quantity, enter a case quantity that can be used in a timely manner. Do not request more than can be stored.

If there are not materials in the Available Materials List, make certain to request enough cases to meet the minimum case requirement.

Click Update Cart Value. This will be deducted from those with remaining entitlement. If no entitlement remains, this value is bonus.

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 update the current shopping cart value. Click the "Continue" button to continue the Checkout process. Click the "Delete" link beside any item to remove it from your cart.

Note that "USDA Shipping Period(s)" indicates the first or second half of a month and not a specific date (e.g. 10/1 indicates USDA will deliver to users 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



Surplus Catalog Requisitions may be placed without any remaining entitlement.

Review the Requisition

Review Requisition

Entitlement Year: 2018-2019, Net. Entitlement: \$31,999.68, Prior Reqs: \$1,000.00, **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 1111 (Delivery Date = 6/28/2019)

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 (e.g. 10/1 indicates USDA will deliver to US Foods sometime between 10/1 and 10/15).

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](#)

Look at the delivery date in the selected items section to ensure this date meets the SFAs needs.

Once the requisition is processed and the requested materials are scheduled for shipment, the SFA CANNOT make changes to the quantities or delivery date.



Please consider holiday breaks and school closures when placing Surplus requisitions as restocking fees will be charged for all cases if someone is not there to receive the shipment.

Quiz Time

True or False: An SFA with no remaining entitlement should request as many cases off the Surplus Catalog as possible.

A True

B False



Quiz Time

True or False: An SFA with no remaining entitlement should request as many cases off the Surplus Catalog as possible.

A True

B False

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



Placing a Requisition

SECTION 3



Placing a Requisition

-  **AN SFA 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, ADE WILL COMPLETE THE REQUEST AND SCHEDULE THE MATERIALS FOR SHIPMENT ON YOUR NEXT AVAILABLE DELIVERY DAY. THIS IS DISPLAYED IN THE SELECTED ITEMS SECTION.**
-  **AN SFA MAY NOT EDIT A REQUISITION OR SCHEDULED SURPLUS SHIPMENT ONCE IT HAS BEEN PLACED.**

Placing a Requisition

Click **Place 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** 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 (e.g. 10/1 indicates USDA will deliver to US Foods sometime between 10/1 and 10/15).

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](#)

THANK YOU! Requisition has been placed. Requisition # = req50 [Click here to view requisition](#)

Continue



ADE will process the requisition and create a shipment. If a Surplus Catalog Requisition shipment is created, it will combine with other shipments listed for the same delivery date and site.

Questions and Answers



SECTION 4

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 ADE to move inventory from the warehouse to SFAs to avoid being charged excess storage fees. If shipment dates are changed to a later date, ADE 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 ADE to move inventory from the warehouse to SFAs to avoid being charged excess storage fees. If you do have remaining entitlement, you will pay for the cases you request.

CONTACT US

If you have a question or require additional assistance, please contact your assigned specialist or contact HNS.



602-542-8700



USDAFoods@azed.gov



www.azed.gov/hns





Congratulations

**You have completed the Online Course:
Step by Step Instruction: How to Create a
Surplus Catalog Requisition**

Information to include when documenting this
training for Professional Standards:

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

Key Area: 1000 - Nutrition
Learning Code: 1170
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.

Certificate

Requesting a training certificate

Please click the button to complete a brief survey about this online training. Once the survey is complete, you will be able to print your certificate of completion from Survey Monkey.



Information to include when documenting this training for Professional Standards:

Training Title:

Key Area: 1000 - Nutrition

Step by Step Instruction:

Learning Code: 1170

How to Create a Surplus

Length: 15 minutes

Catalog Requisition

Please note, attendees must document the amount of training hours indicated on the training despite the amount of time it takes to complete it.





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To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, [AD-3027](#), found online at [How to File a Program Discrimination Complaint](#) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

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

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