Bureau of Food Distribution

PAMeals

Agency User Guide
# Table of Contents

## HOME PAGE

- View the HOME PAGE .......................................................................................................................... 1
- User Alerts .................................................................................................................................................. 1
  - Delete User Alerts ............................................................................................................................... 2
  - Alert Reminder ................................................................................................................................. 2
  - View Attached Record ....................................................................................................................... 3

## ACCOUNT

- Viewing the ACCOUNT PAGE .................................................................................................................. 4
  - Account Information .......................................................................................................................... 4
  - Addresses Panel ............................................................................................................................... 5
  - Agreements Panel ............................................................................................................................ 6
  - Account Attachments Panel ............................................................................................................. 6

## INFORMATION UPDATE REQUEST

- Viewing the INFORMATION UPDATE REQUEST PAGE ........................................................................... 7
  - Clear Existing Data .......................................................................................................................... 8
  - Submitting Address Change Request ........................................................................................... 9
  - Adding GeoCode Coordinates ...................................................................................................... 9
  - Clearing GeoCode Coordinates ..................................................................................................... 10

## AGREEMENTS

- Viewing the AGREEMENT INFORMATION PAGE .................................................................................. 11
  - Agreement Details .......................................................................................................................... 12
  - Sub-Recipient Agencies Panel ...................................................................................................... 13
  - Reviews Panel ............................................................................................................................. 13
  - Base Allocation Panel ..................................................................................................................... 14
  - Agency Transactions Panel .......................................................................................................... 14
  - People Served / Statistics Panel .................................................................................................... 15
  - Inventory and Expense Reimbursement Panel ............................................................................ 15

## INVENTORY & EXPENSE REIMBURSEMENT

- Viewing the INVENTORY & EXPENSE REIMBURSEMENT PAGE ..................................................... 16
  - Create New Inventory & Expense Form ......................................................................................... 17
  - Current In-Process Inventory & Expense Forms .......................................................................... 17

## INVENTORY & EXPENSE EDIT PAGE

- Editing People Served Statistics .......................................................................................................... 19
- Add Commodities ............................................................................................................................... 19
- Delete Commodities .......................................................................................................................... 21
- Save Inventory & Expense Form ......................................................................................................... 22
- Delete Inventory & Expense Form .................................................................................................... 22
Home Page

The Home page provides contact information for the Bureau of Food Distribution. This page also will display any User Alerts assigned to the current user logged as well as any alerts associated to submissions that had have been returned to the user for corrections.

View the Home Page

1. Click on the *Home* link on the side bar to access the Home page.
   a. Note: The Home page is the default page that appears after a user has logged in.

User Alerts

These are messages targeted specifically to the current user. They may include messages from the PAMeals staff or they may include items that have been returned to the user. Items that have been returned will include an attachment link. When clicked, the click will take the user directly to the item that has been returned.
Delete User Alerts

1. To delete a user alert, click on the Delete link at the right of the alert
   a. This action cannot be undone.
   b. “Returned Inventory and Expense (I&E)” alerts cannot be deleted

Alert Reminder

The alert reminder allows the user to have the alert removed from the Home page and re-appear at the selected time.

1. Click on the drop-down list to the left of the Snooze link and select a snooze duration.
2. Click on the Snooze link.
   a. The alert will be removed from the Home page and will re-appear at the selected timeframe.
View Attached Record

1. To view the attached record, click on the View Attached Record link under the alert title.
Account

The Accounts section allows a user to locate existing Accounts for which they have access to. Agency users will only have access to accounts that have been assigned to the user by a PAMeals administrator.

Viewing the Account Page

1. Hover over the Accounts link and click on the Manage Account link on the side bar to access the Accounts page.
2. Click the Select link next to the account record that is to be displayed.
   a. The selected record will appear in read-only mode.

Account Information

The account information is displayed on the current page, broken down into the following categories:

1. Account Information
   a. Displays the account type, account name(s), the Federal ID and company web address.
2. Address, Contact Information, & Mapping Coordinates
   a. By default, this section will show the Default information. This is typically the main mailing address.
   b. Each address type includes a physical address, a contact person including name, phone and email address and optional mapping coordinates.
Addresses Panel

The Addresses Panel provides a user with options to display other addresses associated with the account.

1. Click on the *Select* link next to the address to view the selected address/contact information.
Agreements Panel

The agreements panel provides a user with a list of agreements associated with the account. These represent the current agreement with the Pennsylvania Department of Agriculture. Each account may have one or more associated agreements.

Account Attachments Panel

The account attachments panel will display any documents associated with the account. These may include images of the signed agreement, invoices and agency summary reports.

1. Click on the Attachment Name to open and view the attachment.
Information Update Request

The Information Update Request page is used to submit address change requests. All requests will be reviewed prior to approval.

Viewing the Information Update Request Page

1. Hover over the Accounts link and click on the Manage Account link on the side bar to access the Accounts page.
2. Click the Select link next to the account record that is to be displayed.
3. Below the Mapping Coordinates panel, click on the Information Update Request link.
4. The Information Update Request form will be displayed with the current address and contact information. Modifications can then be made to the current data.

**Clear Existing Data**

To clear all the current data displayed on the agency update screen:

1. Click on the *Clear* link.
Submitting Address Change Request

1. Enter the agency’s new address and contact information that is to be submitted.
2. Click the Submit link.

Adding GeoCode Coordinates

The Latitude / Longitude fields represent the physical coordinates of the entered location. While these fields may be entered by hand, they can be automatically completed:

1. Enter the complete address in the Address panel.
2. Click the GeoCode Address link.
   a. This will use an external service to determine the GPS coordinates based on the address entered. This step is optional. Once processed, a message will be displayed alerting the user how accurate the latitude and longitude returned is. A complete and precise address will yield better, more accurate results.
Clearing GeoCode Coordinates

To clear the GeoCode Coordinates:

1. Click on the *Clear Coordinates* link.
Agreements

Agreements represent a contract between a vendor (account) and the state. Not all account types require agreements and agreement data varies by account type. Each agreement contains information specific to that agreement such as the agreement id, agreement dates, etc.

Viewing the Agreement Information page

1. Hover over the Accounts link and click on the Manage Account link on the side bar to access the Accounts page.
2. Click the Select link next to the account record that is to be displayed.
3. If not opened, click on the Agreements panel to open the available agreements associated with this account.
4. If there are any agreements listed under this account, click on the Agreement ID for the record you are selecting.
The following panels are available for both TEFAP County and TEFAP Lead Agencies

**Agreement Details**

The Agreement details section will be read only and will display the information associated with the selected agreement.
Sub-Recipient Agencies Panel

The Sub-Recipient Agencies panel displays any agencies that are sub-recipients to the selected agency. To view a sub-recipient account:

1. If not opened, click the Sub-Recipient Agencies panel to open the available agencies.
2. If there are any agencies listed, click on the Account Name for the record you are selecting.
   a. This action will return you to the Account screen and will display information for the selected account.

Reviews Panel

The Reviews panel will display any reviews associated with this agreement. These reviews will be in read-only mode. To view a review:

1. If not opened, click the Reviews panel to open.
2. If any reviews are available, click on the Review Forms icon.
3. Click on the Form Name that is to be viewed.
   a. Only Reviews that have a status of Complete are available for viewing.
   b. The Review is in read-only mode.
These data panels are available only for TEFAP County Agencies

Base Allocation Panel

The Base Allocation panel includes the entitlements associated with the selected agreement and will be displayed in read-only mode.

Agency Transactions Panel

This panel displays all transaction data associated with the selected agreement. Agency Transaction data is created when an I & E form is approved.

1. If not opened, click the Agency Transactions panel to open.
2. Click the Refresh Grid to populate the Agency Transactions grid.
   a. All data will be in read-only mode.
Pennsylvania Department of Agriculture
PAMeals

**People Served / Statistics Panel**

The *People Served / Statistics* panel will display all people served data associated with this agreement in read-only mode. This information is submitted along with the I & E data.

![People Served / Statistics Panel](image)

**Inventory and Expense Reimbursement Panel**

The Inventory and Expense Reimbursement panel will display all associated I&E forms associated with the selected agreement.

**View I&E Report**

1. Click the *View* link to the right of an I&E Record to view its report in pdf format.

![View I&E Report](image)

**Edit an I&E Form**

1. Click the *Edit* link to the left of an I&E Record. Note: this option is only available for I & E forms that have not yet been submitted to the PA Department of Agriculture.
   a. The screen will navigate to the *Inventory and Expense Form* page.

![Edit an I&E Form](image)
Pennsylvania Department of Agriculture
PAMeals

Inventory & Expense Reimbursement

This page allows agencies to submit their I & E to the PA Department of Agriculture. This is done by first entering the required information such as the agency, submission date range and people served statistics.

Upon clicking the Continue link, the user is taken to the I & E entry page. Here, the PAMeals system will attempt to pre-load all of the commodities that may have been distributed. If a commodity was distributed that was not pre-loaded the user will have the opportunity to add additional commodities to the list.

Once all of the information has been entered, the user will submit the data to the PA Department of Agriculture for review. It is important to note that not all users will have the ability to submit.

Upon approval, the information entered will be used to determine reimbursement amounts for the agency.

Viewing the Inventory & Expense Reimbursement page

1. Hover over the Accounts link and click on the Inventory & Expense Form link on the side bar to access the Inventory & Expense Reimbursement page.
Pennsylvania Department of Agriculture
PAMeals

Create New Inventory & Expense Form

1. Select an Agency from the Agency dropdown.
   a. Only agencies that have been assigned by an administrator are shown.
2. Select the Beginning and End Month/Year that the new reimbursement form is to be assigned.
   Some agencies will choose to submit monthly while others will submit quarterly.
   a. Users cannot submit data when the date range overlaps an existing expense form’s date range.
3. Enter the appropriate information for the People Served statistics.
   a. Agencies that are listed as Food Banks do not enter statistic data.
4. Click Continue

Current In-Process Inventory & Expense Forms

If there are any I&E Reimbursement Forms that are saved but incomplete, the records will be displayed in the Current In-Process Inventory & Expense Forms grid.

Edit an In-Process I&E Form

1. Click the Edit link to the left of the record that is to be edited.

Delete an In-Process I&E Form

1. Click the Delete link to the right of the record that is to be deleted.
Pennsylvania Department of Agriculture
PAMeals

a. At the *Are You Sure* popup, click the *OK* button.

<table>
<thead>
<tr>
<th>Account</th>
<th>Period Start</th>
<th>Period End</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADAMS COUNTY COMMISSIONERS (0-06-01-069)</td>
<td>February - 2012</td>
<td>February - 2012</td>
</tr>
<tr>
<td>ADAMS COUNTY COMMISSIONERS (0-08-01-069)</td>
<td>March - 2012</td>
<td>March - 2012</td>
</tr>
</tbody>
</table>

*2 record(s) found.*
Inventory & Expense Edit Page

Once you’ve entered the required data and created the new I & E Form the system will display the I & E Edit Page.

Editing People Served Statistics

1. Click the Edit link under the People Served fields.
   a. The People Served fields are not present for Food Bank agencies.
2. Edit the statistic fields as needed.
3. Click the Continue link to save the changes.

Add Commodities

When beginning an I & E form, PAMEals will attempt to pre-populate the screen with those commodities likely distributed during the selected time period. This is determined by examining distributor transactions and is meant to save the user time during data entry. While the system will...
Pennsylvania Department of Agriculture
PAMEals

do it’s best to determine all of the commodities that should appear in the list there is a good chance
that not all commodities will be displayed. In that case the user must add the commodity by
following the procedure below.

1. Click the Add Commodity link.

2. Select a Commodity and an appropriate Program / Source.

3. Enter the Start Inventory amount.

4. Enter data as needed in the Received, Distributed, Transferred Out, and Credits fields.
   a. At least one of these fields must be populated.

5. Enter the Sales Order Number.
6. Click the *Add Commodity* link.

![Add Commodity Form](image)

**Delete Commodities**

When there is no activity on a particular commodity it should be deleted from the list.

1. Click the *Delete* link to the right of a commodity to delete the commodity record.

![Inventory & Expense Form](image)
Pennsylvania Department of Agriculture  
PAMeals  

**Save Inventory & Expense Form**

Once an I & E form has been started the user may submit the data immediately after data entry is complete or the form may be saved to be completed and submitted at a later date. For those users lacking Submit permissions this is the only option.

1. Click the **Save** link to save the Inventory & Expense Form for future editing.  
   a. There must be at least 1 commodity record before an Inventory & Expense Form can be saved.

<table>
<thead>
<tr>
<th>Inventory &amp; Expense Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADAMS COUNTY COMMISSIONERS</td>
</tr>
<tr>
<td>February 2012 - February 2012</td>
</tr>
<tr>
<td>Originally Submitted By</td>
</tr>
<tr>
<td>James Fifth</td>
</tr>
<tr>
<td><a href="mailto:james_fifth@compaid.com">james_fifth@compaid.com</a></td>
</tr>
</tbody>
</table>

**Delete Inventory & Expense Form**

Once saved, the entire I & E form may deleted. Only those forms not yet submitted may be deleted.

1. Click the **Delete** link provided under the I&E Form grid.  
   a. Click the **OK** button to confirm that you want to delete the I&E Form.
Submitting an Inventory & Expense Form

Once an I & E form has been completed, the data must be submitted to the PA Department of Agriculture. This is done by clicking the Finalize link. This link is not enabled for all users.

1. Click the Finalize link to submit the Inventory & Expense Form.
   a. Prior to Finalizing an I&E Form, the submitter must digitally sign the form and check that the information provided is truthful and correct to the best of their ability. This is done by checking the checkbox and entering the users first and last name in the provided space. A form may not be submitted unless this information is provided.
Commodities

The Commodity Search section allows a user to locate an existing commodity based on its commodity code, name or a variety of other categories.

Viewing the Commodity Search page

1. Hover over the Commodity link and click on the Commodity Search link on the side bar to access the Commodity Search page.

Search for a Commodity

1. Click the Search link to display all commodities.
   a. Entering or selecting any data in the Search Criteria panel will serve to filter the search criteria to a smaller, more precise search.
Viewing Commodity Details

1. Search for commodities using the instructions provided above.
2. Click on the Material ID correlating to the commodity record you wish to open.

Commodity View page

The Commodity View page displays all information regarding the selected commodity. All data on this screen is in read-only mode.
Commodity Description

The Commodity Description panel provides information such as Material ID, Category, the commodity’s name, ID, and status.

Packaging Details

The Package Details panel provides information on the commodity’s package description, storage type, weight, units per case, and units per truck.
Pennsylvania Department of Agriculture
PAMeals

![Packaging Details]

**Current Price**

The *Current Price* panel displays the current price of the commodity displayed.

![Current Price]

**Commodity Prices**

The *Commodity Prices* panel displays the price history for the selected commodity.

![Commodity Prices]

**Program/Source**

The *Program/Source* panel displays what programs the selected commodity is used in, and what sources it is available as.

![Program/Source]
Material Orders

PAMeals includes search and display functions for USDA Orders. All of the information about a particular order can be shown by locating the record and drilling down to the details. This information may be useful prior to submitting a I & E data.

Viewing the Material Order Search

1. Hover over the Material Orders link and click on the Order Search link on the side bar to access the Material Order Search page.

Search for Material Orders

1. Click the Search link to search for all Material Orders
   a. Entering or selecting any data in the Search Criteria panel will serve to filter the search criteria to a smaller, more precise search.

Viewing a Material Order

1. Search for Material Orders using the instructions provided above.
Pennsylvania Department of Agriculture
PAMeals

2. Click the Sales Order # for the Material Order that is to be displayed.

Material Order View page

The Material Order View page displays the order details and order items that were listed on the order. In addition, each item listed provides a summary review of the sale.

View Item Summary

1. From within the Material Order View page, click the Sales Order Item link under the Order Items grid.
### Material Order View

**Order Details**
- **Sales Order:** 5000006032
- **Sold To:** PA Dept. of Agriculture

**Order Items**

<table>
<thead>
<tr>
<th>Sales Order Item</th>
<th>Ship To</th>
<th>Total Quantity</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>REINHART FOOD SERVICE</td>
<td>464.000</td>
<td>Item Cancelled</td>
</tr>
</tbody>
</table>

1 record(s) found.

### Item Summary

- **Sales Order:** 5000006032
- **Scheduled Delivery Date:** 10/31/2011
- **Sold To:** PA Dept. of Agriculture
- **Entitlement Year:** 2012
- **Order Item Number:** 100
- **Item Qty:** 464.000
- **PO No.:** 00000
- **Ship To:** REINHART FOOD SERVICE
- **Status:** Item Cancelled
- **Destination City:** COAL TOWNSHIP
- **Destination State:** PA
- **Material No.:** 100348 - CORN FROZEN
- **Program Type:** NSLP
- **Source Type:** Entitlement

### Recipient Agency Details

<table>
<thead>
<tr>
<th>Agreement Id</th>
<th>Account Name</th>
<th>Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PA Dept. of Agriculture</td>
<td>464.000</td>
</tr>
</tbody>
</table>

1 record(s) found.
Agency User Reports

The Agency User Reports page allows the user to run several pre-defined reports. Data from these reports can then be exported to several different file types including PDF and Microsoft Excel.

Viewing the Agency User Reports

1. Hover over the Reports link and click on the Agency User Reports link on the side bar to access the Agency Reports page.

Commodity Price List

The Commodity Price List report lists all TEFAP commodities and their prices.
To view the Commodity Price List report:

1. Under the Commodity Price List Report panel select the proper search criteria that are to be applied to the report query.
2. Click on the Generate Report link.

Agency Summary

The Agency Summary report provides account information and summary information on commodities received from distributors and processors.
Pennsylvania Department of Agriculture
PAMeals

To view the Agency Summary report:

1. Under the Agency Summary Report panel select the proper search criteria that are to be applied to the report query.
2. Click on the Generate Report link.

Agency Usage

The Agency Usage report lists all commodity usage by a specified agency.

To view the Agency Usage report:

1. Under the Agency Usage Report panel select the proper search criteria that are to be applied to the report query.
Pennsylvania Department of Agriculture
PAMeals

2. Click on the *Generate Report* link.

### TEFAP County Reimbursement Report

This report is a printable version of I & E data that has been submitted by the agency. Both approved and in-process submission may be viewed with this report.

### To view the TEFAP County Reimbursement report:

1. Under the *TEFAP County Reimbursement Report* panel select the proper search criteria that are to be applied to the report query.

2. Click on the *Generate Report* link.
## Pennsylvania Department Of Agriculture

**Bureau Of Food Distribution**

**THE EMERGENCY FOOD ASSISTANCE PROGRAM (TEPAP)**

**Inventory & Expense Reimbursement Request Form**

**County: Adams**

**January 2019**

<table>
<thead>
<tr>
<th>Sales Order #</th>
<th>Code #</th>
<th>Commodity Type</th>
<th>Received from Warehouse</th>
<th>Distributed</th>
<th>Case Weight</th>
<th>Total Pounds</th>
<th>Reimbursement</th>
<th>Minus Cases Transferred</th>
<th>Minus Cases Damaged</th>
</tr>
</thead>
<tbody>
<tr>
<td>1234567890</td>
<td>100035</td>
<td>CHEESE RDU FAT</td>
<td>4</td>
<td>4</td>
<td>24.00</td>
<td>96.00</td>
<td>$ 11.52</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>GRAND TOTALS:</strong></td>
<td><strong>4</strong></td>
<td><strong>24.00</strong></td>
<td><strong>96.00</strong></td>
<td><strong>$ 11.52</strong></td>
<td><strong>4</strong></td>
<td><strong>4</strong></td>
</tr>
</tbody>
</table>

Number of new Self-Declaration Forms for Month/Quarter 4

Number of new (unduplicated) Individuals served for Month/Quarter 4

Total Number of people served 4

Confirmed By: JFifth

2/2/2012