



**QUICK START GUIDE:
PREPARING AND SUBMITTING
HOUSEHOLD ROSTERS**

SEPTEMBER 2023



APEC IV

Fourth Access, Participation,
Eligibility and Certification Study

SFA School Data Verification Reference Guide

Table of Contents

Page No.

QUICK START GUIDE.....	3
1. SUMMARY	3
2. WHAT WE ARE ASKING YOU TO DO	3
3. NAVIGATING THE WEB PORTAL	4
3.1 Logging in to the Web Portal.....	4
WEB PORTAL SCREENSHOTS	5

QUICK START GUIDE

1. SUMMARY

Thank you again for participating in the fourth Access, Participation, Eligibility and Certification Study (APEC IV). You are here because you are an SFA with at least one non-CEP school selected to participate in the study.

APEC IV has multiple parts and associated activities. Currently, we are in the second and final phase of **household sampling** for the forthcoming Household Survey component of APEC IV (households know APEC IV as the National School Meals Study).

During this phase, SFAs prepare and submit an updated data file of all students who applied for free or reduced-price meals (whether determined to be eligible or not) or were directly certified for free meals in **SY 2023-2024**.

The success of this important study relies on your participation.

Have questions? We're here to help, Monday – Friday, 9:00 a.m. – 5:00 p.m. EST. You may email us at apec-nsms@westat.com or call 1-855-596-0496. If you reach our voice mail, please leave a message and we will return your call within one business day.

2. WHAT WE ARE ASKING YOU TO DO

We are asking you to prepare and submit a data file with a complete list of students who applied for free or reduced-price meals or were directly certified for free meals in **SY 2023-2024**, in the non-CEP school(s) sampled from your SFA.

An Excel template has been provided for you to fill out. You may also download the template [here](#). Please note:

- The acceptable file formats are: xlsx, xls, csv.
- Although reordering of the columns is not recommended, the columns may be submitted in any order.
- Column headers must be exactly the same as specified in the template.
- You may submit one school per file or multiple schools in a single file.

The data file requests **three categories of information for each student** who applied for free or reduced-price meals or was directly certified for free meals, by school:

1. Student Information

- Student ID, Name, DOB, Gender, Grade

2. School Meal Application Information

- Application Submitted, Application Date, Eligibility Status, Eligibility Date, Direct Certified, Direct Certified Type, Direct Certified Date

3. Parent or Caregiver Contact Information

- Parent Names, Phone Numbers, Emails, Addresses, Cities, States, Zip Codes

NOTE: Descriptions for each column header (variable) are provided in the **KEY** tab of the template.

If you are unable to meet the variable format requirements or require special formatting, please contact us for technical assistance.

3. SUBMITTING YOUR DATA FILES VIA THE SECURE WEB PORTAL

****To protect the privacy and security of the data, please do not email the file to the study****

3.1 Logging in to the Web Portal

- To login to the secure Web Portal, go to <https://household.apec4.org/> and enter your unique SFA Personal Identification Number (PIN). Your PIN was provided in the cover letter.
- **Lost PIN?** We're here to help, Monday – Friday, 9:00 a.m. – 5:00 p.m. EST. You may email us at apec-nsms@westat.com or call 1-855-596-0496.
- **Web Browsers.** The Web Portal is designed to work with any browser, such as Google Chrome, Mozilla Firefox, etc.
- **Excel template.** The Excel template is available for download on the portal login page.

Please continue for screenshots of our user-friendly web portal >>>>>>>>>>>>>>>>

WEB PORTAL SCREENSHOTS AND INSTRUCTIONS BY PAGE

Web Portal Landing Page

- To access the portal, enter your PIN and click the Submit button. As noted, the Excel template is available for download on the login page, as is a copy of this reference guide.


APEC IV
Fourth Access, Participation,
Eligibility and Certification Study

USDA Food and Nutrition Service
U.S. DEPARTMENT OF AGRICULTURE

WELCOME TO THE APEC IV WEB PORTAL

Thank you for your participation in the fourth Access, Participation, Eligibility and Certification Study (APEC IV) series.

In order to complete the household sampling for the study, we request that you use this secure web portal to submit the data file(s) with a complete list of students enrolled in the school(s) sampled from your SFA for the 2022-2023 school year.

A reference guide was sent to you with a summary of the request, instructions, and important notes about the data file to be submitted. You can access the reference guide by clicking on the image of the blue book. 

In addition, you can download an excel spreadsheet template to use when creating the data file by clicking here: [excel spreadsheet template](#)

To begin please enter your PIN. If you do not have your PIN, call the APEC IV Research Team at 1-855-596-0496 or email us at apec-nsms@westat.com. We are available Monday through Friday between 9:00am and 5:00pm Eastern Time.

PIN:

)

Household Roster Submission Page

- After a successful login, the Submission page opens.
- The name and address of your SFA will appear in the upper lefthand corner.
 - A list of your sampled schools will appear in the **1. School/Upload Data** area.

APEC IV

LAVEEN ELEMENTARY DISTRICT
5001 West Dobbins Road
Laveen, AZ 85339
(602) 237-9100

1. School/Upload Data

Use the check boxes below to indicate for which school(s) you are currently uploading the data file. Also, indicate the school's ID as reported in the data file.

Included in file?	School Name	School ID
<input type="checkbox"/>	Desert Meadows Elementary School	<input type="text"/>
<input type="checkbox"/>	Paseo Pointe School	<input type="text"/>
<input type="checkbox"/>	Rogers Ranch School	<input type="text"/>
<input type="checkbox"/>	Vista del Sur Accelerated Academy	<input type="text"/>

2. Contact Information

Provide (or edit if needed) the contact information for the person we should contact if we have follow up questions about the data file(s).

Name:

Email:

Phone Number:

3. Data File Upload

Use the browse button to locate the data file to upload. Add any comments you may have and click "upload file" to upload the file. Please note that only files in .xls, .xlsx, or .csv format are accepted. If you want to upload another file after this file is accepted, you will need to exit and log in again.

No file chosen

1. School Upload Data Area

There are 3 boxed areas on the Submission page. In area **1. School/Upload Data**, indicate which schools you are including in the file you are uploading, and then enter the internal School ID(s).

1. School/Upload Data

Use the check boxes below to indicate for which school(s) you are currently uploading the data file. Also, indicate the school's ID as reported in the data file.

Included in file?	School Name	School ID
<input type="checkbox"/>	Desert Meadows Elementary School	<input type="text"/>
<input checked="" type="checkbox"/>	Paseo Pointe School	95018127
<input type="checkbox"/>	Rogers Ranch School	<input type="text"/>
<input type="checkbox"/>	Vista del Sur Accelerated Academy	<input type="text"/>

2. Contact Information Area

In area **2. Contact Information**, enter the name, email and phone number for the person we should contact with any follow-up questions about the data file.

2. Contact Information

Provide (or edit if needed) the contact information for the person we should contact if we have follow up questions about the data file(s).

Name:

Email:

Phone Number:

3. Data File Upload Area

In area **3. Data File Upload**, click Choose File, navigate to where your file is saved, and select the file. Enter any comments you may have in the Comment box, then click Upload File. (Please note that only .xls, .xlsx or .csv formats can be uploaded. If you foresee any challenges with this, please call or email us.)

3. Data File Upload

Use the browse button to locate the data file to upload. Add any comments you may have and click "upload file" to upload the file. Please note that only files in .xls, .xlsx, or .csv format are accepted.

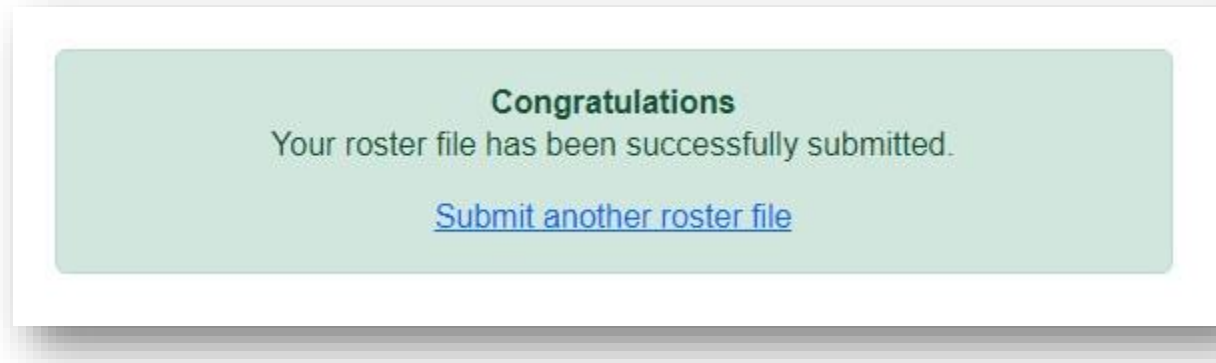
* No file chosen

Comment:

Confirmation Page

The system performs preliminary checks on the data file. If the file is accepted, a message of congratulations will confirm your file has been successfully submitted.

Need to submit another file? Click [Submit another roster file](#).



If the system finds that the file does not meet our criteria, you will see a note with the list of corrections. After correcting the file, follow the same process to re-upload the file.

Still have questions? We're here to help, Monday – Friday, 9:00 a.m. – 5:00 p.m. ET. You may email us at apec-nsms@westat.com or call 1-855-596-0496. If you reach our voice mail, please leave a message and we will return your call within one business day.