

# Commonwealth of Pennsylvania Access to Social Services (COMPASS) System

COMMONWEALTH OF PENNSYLVANIA ACCESS TO SOCIAL SERVICES

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## Pennsylvania Department of Education COMPASS Training Guide for Food Service Directors & Staff

CLICK > APPLY > BENEFIT

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# Getting Started with COMPASS

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## Getting Started with COMPASS

This section covers what you need to know to get started with the COMPASS System.

# Where to Get Help

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**Need technical assistance contact:**

**CNPEARS/COMPASS Help Desk at 1-888-877-1306**

**For questions regarding School Nutrition Program (SNP) regulations contact  
Pennsylvania Department of Education (PDE), Division of Food and Nutrition:**

**School Nutrition Programs**

**[RA-NSLP@state.pa.us](mailto:RA-NSLP@state.pa.us)**

**1-800-331-0129**

**Or**

**Vonda Cooke, State Director of Child Nutrition Programs**

**[vcooke@pa.gov](mailto:vcooke@pa.gov)**

**1-800-331-0129**

**For questions regarding COMPASS user accounts and authorization contact:**

**School Nutrition Programs**

**[RA-NSLP@state.pa.us](mailto:RA-NSLP@state.pa.us)**

**1-800-331-0129**

**For general comments & suggestions on COMPASS e-mail:**

**[COMPASSMail@state.pa.us](mailto:COMPASSMail@state.pa.us)**

# COMPASS System Requirements

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## COMPASS System Requirements

- Below are the system requirements in order to use COMPASS:
- Secure Socket Layer (SSL) compliant browser is required.
- Microsoft Internet Explorer 9.0 or Mozilla FireFox 30.0 or Google Chrome 35.0 or Safari 7.0 or higher is recommended.
- 1024 x 768 resolution or higher is recommended for optimum performance.
- Adobe Acrobat 9.0 or better is required for School Meals Outbox.
  - **Note:** A free download of Adobe Acrobat is available via the CNPEARS website at [www.pears.ed.state.pa.us](http://www.pears.ed.state.pa.us).
- The [compass@state.pa.us](mailto:compass@state.pa.us) e-mail address must be placed on the “Safe Sender” e-mail list. The e-mail administrator at your school should be able to assist with this. This prevents COMPASS e-mails from being identified as junk mail.



# Welcome to COMPASS

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## COMPASS

### Access Community Partner Information

- The COMPASS homepage should appear in your browser window.
- Choosing the “Community Login/Registration” link will cause the “Community Partner Information” screen to appear.

The screenshot displays the COMPASS homepage with the following elements:

- Header:** Pennsylvania logo, COMPASS logo with tagline "CLICK. APPLY. BENEFIT.", date "[SAT]", and navigation links: Other Benefits, Contact Us, FAQ, Help, Site Map, Welcome.
- Language Selection:** En Español, বাংলা, 用汉语, Tiếng Việt, ភាសាខ្មែរ.
- Main Content Area:**
  - Welcome to COMPASS:** "The fast and easy way to apply for benefits - anytime and anywhere. COMPASS is an online application for Pennsylvanians to apply for many health and human service programs. Click on the Apply Now button below to begin or use the links on the right side for further assistance." Includes an "Apply Now" button.
  - Interested in Health Care?** "HealthChoices, Pennsylvania's Medical Assistance program, provides you and your family with many health care options. Click on the Apply Now button below to quickly see what options may be available to you." Includes an "Apply Now" button and links to "Learn more about Pennsylvania's Medical Assistance expansion plan" and "Learn More About the Health Insurance Marketplace".
- Right Side Navigation:**
  - Get Started Now (highlighted in green)
  - Do I Qualify?
  - Apply for Health Care Only
  - Apply for Any Benefits
  - Use LIHEAP COMPASS Registration Number
  - Returning Users (highlighted in red)
  - My COMPASS Account
  - Renew your Benefits
  - Finish your Application/Renewal
  - Check Application Status
- Footer/Bottom Section:**
  - About COMPASS:** Information on how to find out if you qualify for Pennsylvania health and human services, apply for new benefits, finish your application or check your status.
  - Learn More About COMPASS**
  - Helpful Links:** Need Help Using COMPASS, Voter Registration and Information, Voter Registration Form, 1095-B Tax Form Reprint.
  - Learn About Benefits:** For complete information on the specific health and human service programs or benefits available through COMPASS, click on the links below.
    - Health Care
      - Medical Assistance
      - CHIP
    - Home and Community Based Services Referrals
      - Early Intervention Services
      - Intellectual Disability Services
      - Autism Services
    - Long Term Living Services
      - Home and Community Based
      - Nursing Home and Related Facilities
    - Cash Assistance
      - Low Income Home Energy Assistance Program (LIHEAP)
      - SNAP (Food Stamps)
      - School Meals
    - See All Benefits
    - Other Benefits
  - Community Partners:** Community Partners are community-based agencies, organizations, coalitions, hospitals, church groups, sponsors of the National School Lunch Program (NSLP) and other groups that wish to help Pennsylvanians submit applications for health and human services. Includes "Community Partner Login/Registration".
  - Service Providers and Business Partners:** Service Providers and Business Partners are public utilities that provide Lifeline and other program benefits to low-income individuals. Includes "Registration / Login".
  - Provider Search:** Find Early Learning Programs and Child Care Providers, Find Home and Community Based Services Providers.

# Welcome to COMPASS

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## COMPASS

### Access Community Partner Information

- The “Community Partner Information” screen provides information regarding all the steps needed to register as a COMPASS Community Partner, and receive an account.
- Once a Community Partner account and password are obtained, the “Community Partner Dashboard” can be accessed from the “Community Partner Log In”
- You can access the “Forgot Password” link from this page.

The screenshot shows the 'Community Partner Information' page on the COMPASS website. The page has a blue header with the COMPASS logo and navigation links. The main content area is white with a blue header for the section. It includes a welcome message, a list of benefits for becoming a community partner, a sign-in form with fields for User ID and Password, and a section for account cancellation.

**Community Partner Information** [Back to COMPASS Home Page](#)

**Welcome Community Partners**

Community Partners are community-based agencies, organizations, coalitions, hospitals, church groups, sponsors of the National School Lunch Program (NSLP) and other groups that wish to help Pennsylvanians submit applications for health and human services.

**Why become a COMPASS Community Partner?**

Registered COMPASS Community Partners have access to a centralized location to help them manage their applications. This location is commonly known as the Community Partner Dashboard and allows Community Partners to:

- Submit and track all applications in one location
- E-Sign applications on behalf of applicants
- Access saved and submitted applications for up to 180 days
- View statuses of submitted applications
- Submit documents electronically on behalf of applicants and recipients
- View quick reports of applications
- View detailed reports of applications through search function
- View messages from headquarters
- Access forms, links and other publications

If you are a Medical Assistance (MA) provider, and you use your MA provider number when filing the application, you will receive notices of your patient's eligibility, including their MA ID number for billing purposes.

**User ID**

Keystone ID

[Forgot User ID?](#)

**Password**

Password

[Forgot/Change Password?](#)

[Sign In](#)

**Want to Become a Community Partner?**

[Start Online Self-Registration](#)

[Online Self-Registration Guide](#)

**Community Partner Account Cancellation**

An organization can remove itself from the list of registered COMPASS Community Partner organizations at any time by completing the Community Partner Cancellation Form.

[Cancellation Form.](#)

# Welcome to the Community Partner Dashboard

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## Community Partner Dashboard (CPD) Homepage

The “Community Partner User Dashboard” is the homepage for using the “Free or Reduced Price School Meals Program” features of COMPASS.

- Dashboard Layout
  1. Navigation Menu
  2. Message Board
  3. Monthly Count of Applications received
  4. Application Outbox
- Further instruction regarding each of these features is provided in the other training sections within these materials.

The screenshot shows the COMPASS dashboard interface. Callout 1 points to the left-hand navigation menu with options: SNAP/TANF Inquiry, Income Verification Inquiry, Saved Applications, E-Mail Notification, CNPEARS, and Direct Certification. Callout 2 points to the 'Messages from Headquarters' section, which contains two messages from 03/23/2016 and 03/18/2016. Callout 3 points to a green box stating 'Your Organization has received 6 applications this month'. Callout 4 points to the 'Applications your organization recently received (Application Outbox)' table, which lists application details for Cumberland Valley Sd (Mechanicsburg).

App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits		From Application				Flags
					SNAP/TANF	H	M	R	F		
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1		Y	Y	Y	Y		
<input type="checkbox"/> W27100422	neeragaferds	personamdf	3/24/2016	1							
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1		Y					
<input type="checkbox"/> W44100337	super	mom	4/28/2015	1		Y	Y	Y	Y		
<input type="checkbox"/> W91100441	super	testmom	4/28/2015	1		Y	Y	Y	Y		

# Welcome to the Community Partner Dashboard

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## Community Partner Dashboard (CPD) Homepage

- The “Community Partner User Dashboard” is the homepage for using the “Free or Reduced Price School Meals Program” features of COMPASS.
- The functionalities that are included on the dashboard are :
  - Application Outbox
  - Saved Applications
  - SNAP/TANF Inquiry
  - Income Verification Inquiry
  - E-mail Notification
  - CNPEARS
  - Direct Certification
- Click on the corresponding buttons to use these features.
- Further instruction regarding each of these features is provided in the other training sections within these materials.

The screenshot shows the COMPASS dashboard interface. A red box highlights the sidebar navigation menu with the following items: SNAP/TANF Inquiry, Income Verification Inquiry, Saved Applications, E-Mail Notification, CNPEARS, and Direct Certification. Below the sidebar, a green box indicates 'Your Organization has received 6 applications this month'. The main content area features a 'Messages from Headquarters' section with two messages, and an 'Applications your organization recently received (Application Outbox)' table.

App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits		From Application				Flags
					SNAP/TANF	H	M	R	F		
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1		Y	Y	Y	Y		
<input type="checkbox"/> W27100422	neeragalferds	personamdf	3/24/2016	1							
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1		Y					
<input type="checkbox"/> W44100337	super	mom	4/28/2015	1		Y	Y	Y	Y		
<input type="checkbox"/> W91100441	super	testmom	4/28/2015	1		Y	Y	Y	Y		

# Child Nutrition Program Electronic Application and Reimbursement System (CNPEARS)

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## Community Partner View CNPEARS

- Clicking the CNPEARS button will cause a new window to open showing the CNPEARS system.
- The CNPEARS system can be navigated from this new window.
- To return to COMPASS, close the CNPEARS window or click on the COMPASS window.
- **Note:** For more information regarding CNPEARS, please contact the CNPEARS Help Desk at **1-888-877-1306**.

A screenshot of the CNPEARS website interface. The browser address bar shows "https://www.pears.ed.state.pa.us/snp/splash.aspx". The page header includes the "CN PEARS" logo and the text "Child Nutrition Program Electronic Application and Reimbursement System", along with the "pennsylvania DEPARTMENT OF EDUCATION" logo. The main content area is titled "Welcome to CN PEARS" and includes a "Returning Users: Log On" section with fields for "User ID:" and "Password:" and a "Log On" button. Below this is a "Links" section with a list of links: "New Sponsor Application Package", "PDE Home", "PDE-DFN", "School Nutrition Toolbox", "Child Nutrition Toolbox", and "PDE Training Registration". To the right, there are sections for "Interested in PEARS?" (with contact information: 888-877-1306), "System Maintenance" (stating unavailability on Mondays, Wednesdays, and Friday evenings), and "Resetting Your Password" (with a list of password requirements: minimum 8 characters, one special character, one uppercase letter, and one numeric character).

# Child Nutrition Program Electronic Application and Reimbursement System (CNPEARS)

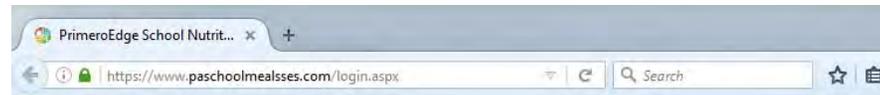
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## Community Partner View Direct Certification

- Clicking the Direct Certification button will cause a new window to open showing the PrimeroEdge Pennsylvania Student Eligibility System (PA-SES).
- The PA-SES system can be navigated from this new window.
- To return to COMPASS, close the PA-SES window or click on the COMPASS window.
- **Note:** For more information regarding PA-SES contact CN Resource 855-286-7685.

A screenshot of the PrimeroEdge login form. The form has a dark header with the "PrimeroEdge" logo. Below the header, there are two input fields: "Username" and "Password". Below the password field, there is a checkbox labeled "I have read and agree to the PDE Certification Agreement." and a "Login" button. The form is set against a light blue background.

[About PrimeroEdge](#)

# Information Tab

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## Information Tab Access

- The "Information" tab is provided for easier access to information on social service benefits, downloadable forms and other helpful links .

The screenshot shows the COMPASS website interface. At the top, there is a navigation bar with the COMPASS logo and tagline "CLICK. APPLY. BENEFIT.". Below the logo, there are links for "Other Benefits", "Contact Us", "FAQ", "Help", "Site Map", and "Welcome, Test". The main navigation area has two tabs: "Home" and "Information", with "Information" highlighted by a red box. The "Information" tab content is divided into three sections:

- Benefits Information:** A list of social service programs with expandable arrows. The programs listed are: Health Care Coverage (CHIP, Medical Assistance, Mental Health/Substance Abuse, Health Insurance Marketplace), Supplemental Nutrition Assistance Program (Food Stamps), Free or Reduced Price School Meals, Cash Assistance, Child Care Works, Long Term Living Services - Home and Community Based, Long Term Living Services - Nursing Home and Related Facilities, and Low-Income Home Energy Assistance Program (LIHEAP).
- Downloadable Forms:** A list of downloadable forms with expandable arrows. The forms listed are: CD 878: Medical Assessment Form, CD 924: Education Schedule Verification, CD 930: Class/Training Schedule Verification, CY 925: Employment Verification Form, PA 1663: Employability Assessment Form, PA 1664: Employability Re-Assessment Form, PA 1666: Criminal History Inquiry, PA 1671: Health-Sustaining Medication Assessment Form, and PA 635: Medical Assessment Form.
- Other Helpful Links:** A list of helpful links with expandable arrows. The links listed are: Cash Assistance Handbook, Child Care Provider Search, CPD Features Guide, DHS Website, LIHEAP Handbook, Medical Assistance Handbook, NSLP Eligibility (highlighted with a red box), PDE COMPASS Training Guide (highlighted with a red box), and SNAP (Food Stamps) Handbook.

# Online Self-Registration

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## Online Self-Registration

This section covers the Online Self-Registration feature that is available for PDE Community Partners via COMPASS.

# Community Partner Online Self-Registration

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## Online Self-Registration for PDE Community Partners

Here are the benefits of the Community Partner Online Self-Registration:

- Online Self-Registration process streamlines the business process by allowing NSLP Sponsors to register online via COMPASS. This will reduce the time taken for registration by sponsors as well as reduce the time PDE, Division of Food and Nutrition (DFN), spend on account administration.
- Online Self-Registration makes improvements to profile creation that will drive accuracy and improve user control and satisfaction.
- Online Self-Registration will significantly reduce the amount of paper handling, in turn reducing the costs and time spent on printing, mailing and scanning documents.

# Community Partner Online Self-Registration

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## COMPASS Access Community Partner Information

- Open a new browser window.
- Enter the COMPASS web address into the browser address bar:  
  
[www.compass.state.pa.us](http://www.compass.state.pa.us)
- Click “Go” to proceed to the COMPASS homepage.
- The COMPASS homepage should appear in your browser window.
- Click the “Community Partner Login / Registration” link located in the bottom-right section of the screen.

The screenshot displays the COMPASS website homepage. At the top, there is a navigation bar with links for 'Other Benefits', 'Contact Us', 'FAQ', 'Help', 'Site Map', and 'Welcome'. Below this, a language selection menu offers options for English, Spanish, Chinese, Vietnamese, and Hindi. The main content area features two prominent banners: one for general 'Welcome to COMPASS' with an 'Apply Now' button, and another for 'Interested in Health Care?' with an 'Apply Now' button and links to learn more about the Medical Assistance expansion plan and the Health Insurance Marketplace. To the right of these banners is a vertical menu with links: 'Get Started Now', 'Do I Qualify?', 'Apply for Health Care Only', 'Apply for Any Benefits', 'Use LIHEAP COMPASS Registration Number', 'Returning Users', 'My COMPASS Account', 'Renew your Benefits', 'Finish your Application/Renewal', and 'Check Application Status'. The bottom section of the page is divided into three columns: 'About COMPASS' (explaining the application's purpose and providing helpful links like 'Need Help Using COMPASS' and 'Voter Registration and Information'), 'Learn About Benefits' (listing various services such as Health Care, Home and Community Based Services Referrals, Long Term Living Services, Cash Assistance, and SNAP), and 'Community Partners' (describing the role of community-based agencies and providing a 'Provider Search' link).

# Community Partner Online Self-Registration



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## COMPASS Community Partner – Sign Up

- Two Representatives from each NSLP sponsoring organization will be able to receive access to COMPASS:
  - These two (2) representatives will have their own Community Partner NSLP User accounts in COMPASS.
  - Due to security implications, usernames and passwords **should not** be shared with others.
- The Data Release Agreement (DRA) must be submitted online to PDE. Once PDE approves it, a Community Partner account can be created.
- If you encounter any problems while setting up a COMPASS account, contact the CNPEARS/COMPASS Help Desk at 1-888-877-1306.

# Getting a Community Partner Account



## Community Partner Online Self-Registration Community Partner Accounts Management

- Click the “Start Online Self-Registration” button located in the “Instructions for PDE NSLP Sponsor Registration” section of the screen.
  - **Note:** User account registration will have to be completed in a single session. Users can not leave and return to the application and finish.
  - **Note:** Any unfinished applications will be purged from the system in 24 hours.
- The self-registration “Identify the Program” screen will appear.

The screenshot shows the COMPASS website interface for Community Partner Information. At the top, there is a navigation bar with links for 'Other Benefits', 'Contact Us', 'FAQ', 'Help', and 'Site Map'. The main content area is titled 'Community Partner Information' and includes a 'Back to COMPASS Home Page' link. Below the title, there is a 'Welcome Community Partners' section followed by a paragraph explaining the role of Community Partners. A 'Why become a COMPASS Community Partner?' section lists several benefits, such as submitting and tracking applications in one location, E-Signing applications, and accessing saved applications. To the right of this list is a login form with fields for 'User ID' (Keystone ID) and 'Password', each with a 'Forgot' link. A 'Sign In' button is located below the password field. At the bottom of the page, there is a 'Community Partner Account Cancellation' section and a 'Start Online Self-Registration' button with a link to the 'Online Self-Registration Guide'.

# Getting a Community Partner Account



## Online Self-Registration for PDE Community Partners Identify the Program

- Click the radio button next to the appropriate Commonwealth Agency. Then click the “Continue” button.
  - **Note:** Clicking the “Next” button without selecting a radio button will result in an error.
  - Click the “Previous” button to return to the “Community Partner Accounts Management” screen.
- The “Identify Community Partner Organization” screen will appear.

**Identify the Program**

Please identify the program that you are a Community Partner for by selecting one of the radio buttons below.

- COMPASS Community Partners
- National School Lunch Program Sponsors/Pennsylvania Department of Education

PREVIOUS NEXT

# Getting a Community Partner Account



## Online Self-Registration for PDE Community Partners Identify Community Partner Organization

- The “Identify Community Partner Organization” screen requires the “Federal Employer Identification Number” (FEIN) and “CNPEARS Agreement Number/Administrative Unit Number(AUN)” to be entered.
  - Click the “Previous” button to return to the previous screen.
  - **Note:** The Online Self-Registration process cannot continue if either one of these numbers is invalid.
- Click the “Next” button and the “Community Partner Organization Information” screen will appear.

**Identify Community Partner Organization**

Register your organization for online access to the COMPASS website by providing your organization's Federal Employer Identification Number (FEIN) and CNPEARS Agreement Number/AUN below:

Federal Employer Identification Number:\*  -

Note: Enter your nine-digit FEIN (in XX-XXXXXXX format), that was assigned to your organization by the IRS.

CNPEARS Agreement Number/AUN:\*  -  -  -

Note: Enter your nine-digit AUN (in XXX-XX-XXX-X format), that was assigned to your organization by PDE.

# Getting a Community Partner Account

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## Online Self-Registration for PDE Community Partners User Information

- Select a representative from the “Representative Information” section.
    - The representative will be responsible for verifying the user’s authorization prior to PDE giving authorization.
    - The representative selected will be notified of the user agreements and have the responsibility of approving/disapproving the user’s authorization request.
    - **Note:** If the appropriate representative is not listed, update CNPEARS with the correct data. Please note this change will take one full day to propagate to the COMPASS website.
  - Click the “Next” button to proceed to the “User Confidentiality Agreement” screen.
    - Click the “Previous” button to return to the previous screen.
- **Note:** Clicking the “Next” button without selecting a radio button will result in an error.

**User Information**

**Organization Information:**

Federal Employer Identification Number: 231494791  
CNPEARS Agreement Number/AUN: 215221453

**Sponsor Name:** CATHOLIC CHARITIES OF THE DIOCESE OF HBG PA INC

Add a new user to your organization by filling out the information below.

**Personal Information of the registering user:**

**First Name:** \*

**Last Name:** \*

**Title:** \*

**E-mail Address:** \*

**Account Information:**

**Password:** \*  Password Must:  
- be 8 to 14 characters in length  
- contain at least one uppercase letter  
- contain at least one lowercase letter  
- contain at least one number  
- contain neither the user ID, nor any part of the user's full name  
- contain at least one special character and spaces are not allowed

**Confirm Password:** \*

**Representative Information:**

Please select a Representative who will be responsible for approving your organization's application. When selecting a representative, please make sure you select the authorized person within your organization. If your representative is not listed below, please check the information listed within CNPEARS.

Representative Name	Phone Number	E-mail Address
<input type="radio"/> Mark Totato	717-657-4804	mtotaro@cchbg.org
<input type="radio"/> Jennifer Summerson	717-259-9537	jsummerson@cchbg.org

# Getting a Community Partner Account

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## Online Self-Registration for PDE Community Partners User Confidentiality Agreement

- The “User Confidentiality Agreement” defines the responsibility of the DHS, Pennsylvania Insurance Department (PID), PDE and the Community Partner Organization (CPO) as it pertains to COMPASS account applications.
- Select the “I have read...” agreement statement.
  - Selecting the “I do not accept...” agreement statement will end the on-line registration process.
  - Click the “Previous” button to return to the previous screen.
- Click the “Next” button to proceed to the “Registration Confirmation” screen.

### User Confidentiality Agreement

Below is the User Agreement. You must read, agree with and accept all of the terms and conditions contained in this Agreement.

The value and sensitivity of certain information is protected by law and by the strict policies of the Department of Human Services, the Pennsylvania Department of Education, and the Insurance Department (collectively, the Departments). The intent of these laws and policies is to assure that confidential information will remain confidential and will be used ONLY as necessary to accomplish the purposes of the Data Release Agreement to which this User Confidentiality Agreement is appended. Information that is confidential may include, but is not limited to, financial, health, medical, eligibility, employee, intellectual property, contractual and information of a competitive advantage nature.

As a condition to receiving a computer sign-on ID and password code (password) and being allowed access to a system, including authorization to access any form of confidential information identified above, I, the undersigned, agree to comply with the following terms and conditions:

1. My ID and password is equivalent to my LEGAL SIGNATURE and I will not disclose this code to anyone, write this code down, or allow anyone to access the system using my password.
2. I am responsible and accountable for all entries made and all retrievals accessed under my ID and password, even if such action was made by another due to my intentional or negligent act or omission.
3. I will keep confidential any data or information to which I have gained access through the Data Release Agreement.
4. I will not attempt to learn or use another's password.
5. I will not access any on-line computer system using an ID and password other than my own.
6. If I have reason to believe that the confidentiality of my password has been compromised, I will immediately change my password and notify my supervisor.
7. I will not access or request any information that is not necessary for the performance of my responsibilities under the Data Release Agreement.
8. I will not access, use or disclose any confidential information unless required to do so in the official capacity of my employment or contract.
9. I understand that I have no right or ownership interest in any information acquired through facilitating applications through COMPASS.
10. I will secure a computer application (COMPASS) to the extent that no one else will be able to access, use, or view the data.
11. I will comply with all policies and procedures and other rules of the Departments relating to confidentiality of information and passwords.
12. I understand that my use of COMPASS will be periodically monitored to ensure compliance with this Agreement.
13. I will limit disclosure to only parties with a legitimate need in the performance of the purposes of the Data Release Agreement. The Departments will determine legitimate need.
14. I agree that disclosure of confidential information is prohibited indefinitely, even after the termination of employment or the business relationship, unless specifically waived in writing by the Departments.

I have read and understand this entire nondisclosure Agreement and agree to abide by it. I understand that if I violate any of the above terms, I may be subject to disciplinary action, including discharge, loss of privileges, termination of contract, legal action for monetary damages or injunction, or both or any other remedy available to the Departments. I understand that I may be subject to criminal prosecution if I knowingly and intentionally disclose the information to anyone who is unauthorized or use the data for fraudulent purposes.

User's Name/Title John Doe Date 3/30/2016

(Please Print)  
User's Signature John Doe

Supervisor's Name/Title Mark Totato Date \_\_\_\_\_  
Supervisor's Signature \_\_\_\_\_

- I have read, fully understand and agree to the “User Confidentiality Agreement” Terms and Conditions.  
 I do not accept the “User Confidentiality Agreement” Terms and Conditions

PREVIOUS NEXT

# Getting a Community Partner Account

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## Online Self-Registration for PDE Community Partners User Confidentiality Agreement

- Click the “View User Agreement” link to view a copy of the “User Confidentiality Agreement” via Adobe Acrobat.
  - **Note:** A copy of the “User Confidentiality Agreement” can be saved or printed using the Adobe Acrobat tool bar. Close the Adobe Acrobat window to continue the online self-registration process.
- Click the “Next” button on the “View User Confidentiality Agreement” screen to complete the online-registration process.
  - Click the “Previous” button to return to the previous screen.

### View User Confidentiality Agreement

You are about to complete the online registration process. Before continuing, you can view & print a copy of the agreement for your records by clicking on the link provided below.

[View User Agreement](#) Please note that you will not be able to print this agreement once you click the “Next” button below.

◀ PREVIOUS

NEXT ▶

### USER CONFIDENTIALITY AGREEMENT

The value and sensitivity of certain information is protected by law and by the strict policies of the Department of Public Welfare, the Pennsylvania Department of Education, and the Insurance Department (collectively, the Departments). The intent of these laws and policies is to assure that confidential information will remain confidential and will be used ONLY as necessary to accomplish the purposes of the Data Release Agreement to which this User Confidentiality Agreement is appended. Information that is confidential may include, but is not limited to, financial, health, medical, eligibility, employee, intellectual property, contractual and information of a competitive advantage nature.

As a condition to receiving a computer sign-on ID and password code (password) and being allowed access to a system, including authorization to access any form of confidential information identified above, I, the undersigned, agree to comply with the following terms and conditions:

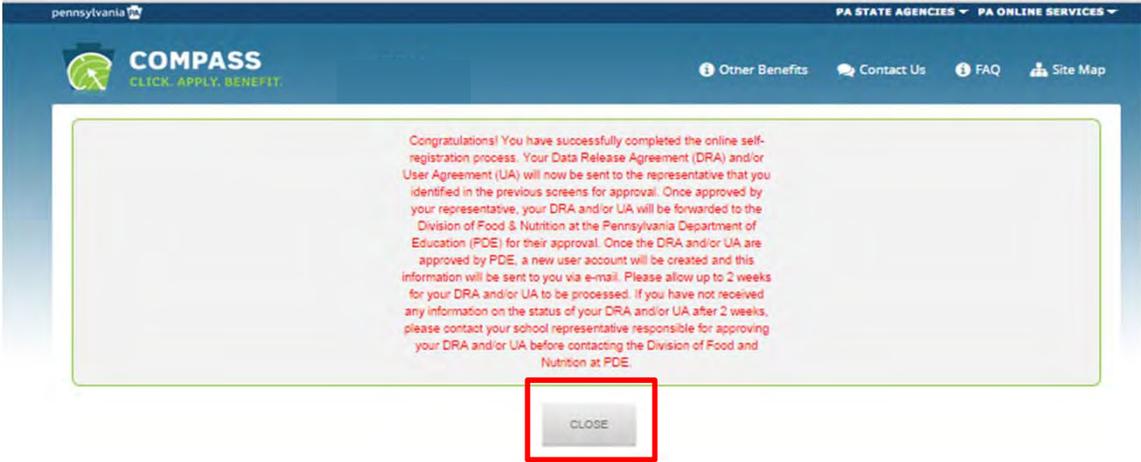
1. My ID and password is equivalent to my LEGAL SIGNATURE and I will not disclose this code to anyone, write this code down, or allow anyone to access the system using my password.
2. I am responsible and accountable for all entries made and all retrievals accessed under my ID and password, even if such action was made by another due to my intentional or negligent act or omission.
3. I will keep confidential any data or information to which I have gained access through the Data Release Agreement.
4. I will not attempt to learn or use another's password.

# Getting a Community Partner Account



## Online Self-Registration for PDE Community Partners Registration Confirmation

- The “Registration Confirmation” screen confirms that the user registration process has been completed successfully, and provides the user with an explanation of the next steps to complete the processing of a “user account.”
  - **Note:** If the user does not receive any information about the status of the application after two weeks, the organization representative responsible for approving the application should be contacted.
- Click the “Close” button to return to close out of COMPASS completely.



# Getting a Community Partner Account



## Online Self-Registration for PDE Community Partners Email Notification of KEYSTONE ID

- Each organization will have an Authorized Representative (AR) responsible for approving the user's account application (for details on this process please refer to slides 33 – 41).
- Once the approval process has been completed, the user will receive an e-mail supplying the KEYSTONE ID, as well as a direct link to the [COMPASS](#) website.

Your ~~COMPASS~~ account has been successfully created and you are now ready to login to [COMPASS](#). To access your account, enter your COMPASS login listed below and the ~~password that~~ you created during COMPASS registration.

**KEYSTONE ID: b-t2627**

\*Please do not reply to this e-mail, as we are unable to respond from this address. If you need help or would like to contact us, please call the CN PEARS/COMPASS Helpdesk at 1-888-877-1306.

# Getting a Community Partner Account

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## Online Self-Registration for PDE Community Partners Log-In With New Keystone ID

- Once you click on the [www.compass.state.pa.us](http://www.compass.state.pa.us) link and are directed to the COMPASS website, you will log-in on the home screen with the new KEYSTONE ID that you have been provided.
- You will use the password you created during the Online Self-Registration process.

- E-Sign applications on behalf of applicants
- Access saved and submitted applications for up to 180 days
- View statuses of submitted applications
- Submit documents electronically on behalf of applicants and recipients
- View quick reports of applications
- View detailed reports of applications through search function
- View messages from headquarters
- Access forms, links and other publications

If you are a Medical Assistance (MA) provider, and you use your MA provider number when filing the application, you will receive notices of your patient's eligibility, including their MA ID number for billing purposes.

### Community Partner Account Cancellation

An organization can remove itself from the list of registered COMPASS Community Partner organizations at any time by completing the Community Partner Cancellation Form.

# Getting a Community Partner Account



## Online Self-Registration for PDE Community Partners User Agreement

- Upon first log-in you will be directed to read and review a \*User Agreement.
- To move forward you must agree to read, fully understand and agree to the Management Directive MD 205\_34.
- After you make your selection, click "Next" to move forward.

**MANAGEMENT DIRECTIVE** 205.34 Amended Number  
COMMONWEALTH OF PENNSYLVANIA  
GOVERNOR'S OFFICE

Subject:

User Agreement  I have read, fully understand and agree to the Management Directive MD 205.34  
 I do not accept the terms and conditions in Management Directive MD 205.34

Next Cancel

# Getting a Community Partner Account

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[www.compass.state.pa.us](http://www.compass.state.pa.us)



## Online Self-Registration for PDE Community Partners Security Question

• = Required

- Next you will be directed to a Security Question screen.
- First you must enter your First Name, Last Name, Email, and Confirm Email.
- You will next be prompted to answer 3 security questions to secure your password.
- Chose your security questions by using the drop-down tool to the right of the question.
- Answer the 3 security questions with answers that pertain to you.
- It is important that you are aware of the answers you record to the security questions. These will be your "Hint Questions" if you forget your log-in password in the future.

User ID

•First Name

•Last Name

Email

•Confirm Email

•Security Question 1  ▼

•Answer 1

•Security Question 2  ▼

•Answer 2

•Security Question 3  ▼

•Answer 3

Primary Phone

# Online Self-Registration Representative Administration



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## Online Self-Registration for PDE Community Partners Representative Administration

- The following steps will occur during representative administration:
- Each organization will have an Authorized Representative (AR) responsible for approving the organization's COMPASS account application. The representative information for all the SNP Sponsors will be imported from CNPEARS. The Sponsor is responsible for keeping the CNPEARS information accurate and current. Once the Data Release Agreement (DRA) is complete, the user will be directed to complete the User Agreement (UA).
- Once the registering user completes the DRA and UA, two e-mails will be sent to the organization's AR. One is to approve/reject the DRA and the other is to approve/reject the UA for the user's access into COMPASS.
  - **Note:** The DRA must be approved by the Division of Food and Nutrition before the system will allow the AR to approve the UA.
- The AR will be responsible for reviewing, approving or rejecting all new user applications, as well as maintaining the users for a particular organization. If an application is rejected, it is the responsibility of the representative to notify the user of the rejection.
- All approved applications will be sent to the PDE, DFN, for review and approval. The Division of Food and Nutrition will review all applications received from the AR and approve or reject each one of them. Any rejected applications will be stored for historical purposes, and the DFN will be responsible for notifying the user.
- Once all agreements have been approved, the user will receive an e-mail supplying the User ID as well as a direct link to the COMPASS website. Please see the next slide for screen shots of first-time log in.

# Online Self-Registration Representative Administration

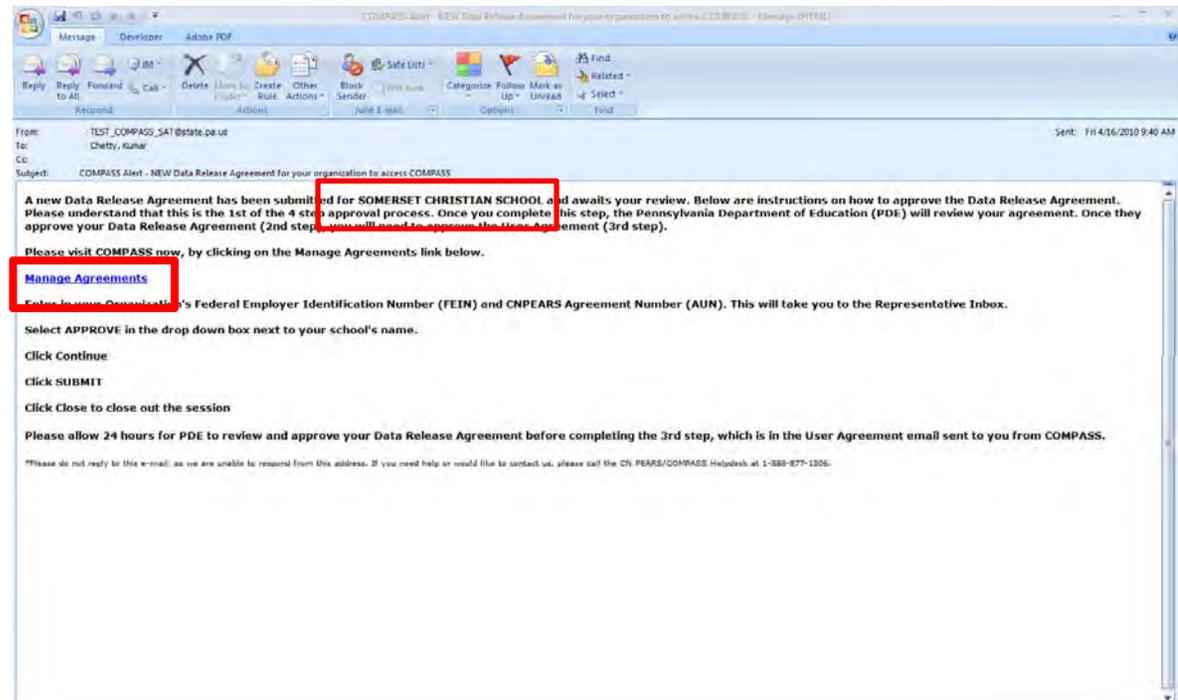


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## Representative Administration Representative Validation – Manage Agreements

- Once the registering user completes the online-registration process the AR will receive two (2) e-mails containing a “COMPASS Alert.” The first, for the new Data Release Agreement and the second, for the new User Agreement, that has been created for the user to access COMPASS.
  - Note:** The e-mail will identify what organization the agreement(s) have been submitted for.
- Click the “Manage Agreements” link to proceed to the “Representative Validation” screen and begin the process to approve/reject the new registration request(s).



# Online Self-Registration Representative Administration



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## Representative Administration Representative Validation

- The “Representative Validation” screen allows the designated AR to authenticate their identity so they can securely access the “Representative Inbox” screen.
- The “Representative Validation” screen is only accessible via a hyperlink provided in an e-mail COMPASS sends to a representative when there are new account applications submitted that need to have actions taken.
  - **Note:** The hyperlink includes a COMPASS secured identifier string which, in combination with the organization FEIN and CNPEARS Agreement Number/AUN, provides secure access to the “Representative Inbox.”
- Enter the FEIN and CNPEARS Agreement Number/AUN, then click the “Submit” button.
- If a valid FEIN and CNPEARS Agreement Number/AUN are entered, the “Representative Inbox” screen will appear.

**Representative Validation**

Enter your Organization's Federal Employer Identification Number (FEIN) and CNPEARS Agreement Number below to validate your Inbox access.

Federal Employer Identification Number: \*  -

Note: Enter your nine-digit FEIN (in XX-XXXXXXX format), that was assigned to your organization by the IRS.

CNPEARS Agreement Number: \*  -  -  -

Note: Enter your nine-digit CNPEARS Agreement Number (in XXX-XX-XXX-X format), that was assigned to your organization by the PDE.

# Representative Inbox

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## Representative Administration Representative Inbox

- Representatives identified for each sponsor are given authorization to approve or reject agreements for access into COMPASS.
  - Note:** Applications not approved within 60 days will be automatically purged from the system.
- A DRA requiring approval for the first time will have a drop-down menu in the "Action" column. Otherwise, the "Action" column will have a status of "Representative Approved" or "Completed."
- If the DRA has been marked "Completed" or "Approved," click on the "User Agreements" link at the top of the screen and proceed to the "User Agreements" screen.
  - Note:** Further instructions regarding the "User Agreements" screen will be given in following pages.
- If the DRA requires approval/rejection, select "Approve" or "Reject" from the "Action" drop-down menu, then click the "Submit" button and a "Confirm Authorization" screen will appear.

Representative Inbox | User Agreements

Representative Inbox

Below are your organization's Federal Employer Identification Number (FEIN) and CNPEARS Agreement Number/AUN.  
Federal Employer Identification Number: 231526669  
CNPEARS Agreement Number/AUN: 300098300

Below is your organization's Data Release Agreement (DRA). If your organization is requesting access to COMPASS for the first time, you will need to review and approve the DRA before new user applications can be approved. Please note that the new user application(s) will appear only after you have approved the DRA. Click on the hyperlink below to view and/or print a copy of their Data Release Agreement (DRA).

Action	Sponsor Name	Address	Representative Name	Representative Contact
Representative Approved	VALLEY DAY SCHOOL	300 Allendale Drive Morrisville, PA 19067	Jeffrey J. Brooks	c-kasare@state.pa.us 215-295-1155 Extn. 12

Close

If your DRA has been marked as "Completed", as indicated under the "Action" column, please check on the "User Agreement" link at the top of this page.  
Note: Please notify the applicant with the specific reason in case of Rejection.

Representative Inbox | User Agreements

Representative Inbox

Below are your organization's Federal Employer Identification Number (FEIN) and CNPEARS Agreement Number/AUN.  
Federal Employer Identification Number: 251804822  
CNPEARS Agreement Number/AUN: 115223360

Below is your organization's Data Release Agreement (DRA). If your organization is requesting access to COMPASS for the first time, you will need to review and approve the DRA before new user applications can be approved. Please note that the new user application(s) will appear only after you have approved the DRA. Click on the hyperlink below to view and/or print a copy of their Data Release Agreement (DRA).

Action	Sponsor Name	Address	Representative Name	Representative Contact
<input type="text"/>	RONALD H BROWN CHARTER SCHOOL	279 Boas St., 909 Green St. Harrisburg, PA 17102	Rae L. Talley	c-abmalik@state.pa.us 717-232-7696

Submit Close

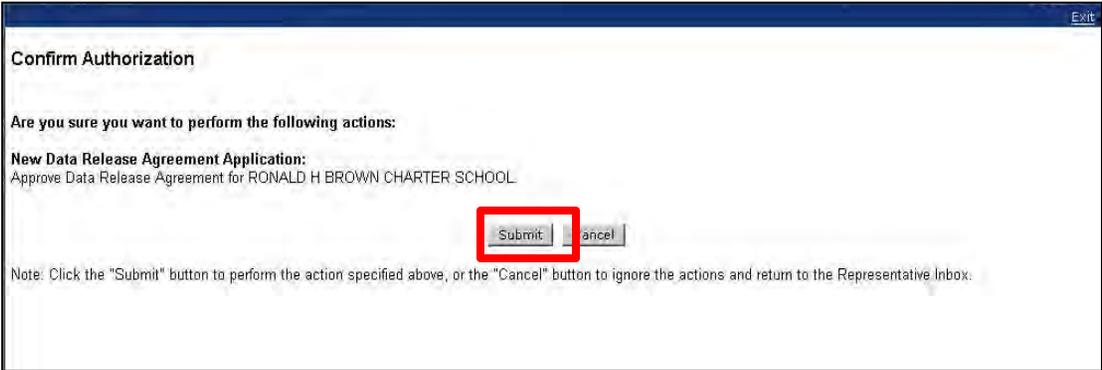
If your DRA has been marked as "Completed", as indicated under the "Action" column, please check on the "User Agreement" link at the top of this page.  
Note: Please notify the applicant with the specific reason in case of Rejection.

# Representative Inbox



## Representative Administration Representative Inbox – Confirm Authorization

- Click the “Submit” button to approve the “Data Release Agreement” submitted by the registrant and return to the “Representative Inbox” screen.
  - Click the “Cancel” button to return to the “Representative Inbox” screen without approving the DRA.



# Representative Inbox

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## Representative Administration Representative Inbox

- Click the “User Agreements” link, and the “User Agreements” screen will appear.
- Click the “Close” button to return to close out of COMPASS.

Representative Inbox | **User Agreements** | Exit

### Representative Inbox

Below are your organization's Federal Employer Identification Number (FEIN) and CNPEARS Agreement Number/AUN.  
Federal Employer Identification Number: 231526669  
CNPEARS Agreement Number/AUN: 300098300

Below is your organization's Data Release Agreement (DRA). If your organization is requesting access to COMPASS for the first time, you will need to review and approve the DRA before new user applications can be approved. Please note that the new user application(s) will appear only after you have approved the DRA. Click on the hyperlink below to view and/or print a copy of their Data Release Agreement (DRA).

Action	Sponsor Name	Address	Representative Name	Representative Contact
Representative Approved	<a href="#">VALLEY DAY SCHOOL</a>	300 Allendale Drive Morrisville, PA 19067	Jeffrey J. Brooks	c-kasare@state.pa.us 215-295-1155 Extn. 12

If your DRA has been marked as "Completed", as indicated under the "Action" column, please check on the "User Agreement" link at the top of this page.  
Note: Please notify the applicant with the specific reason in case of Rejection.

# User Agreements

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## Representative Administration User Agreements

- The “User Agreements” screen allows the AR to manage user accounts by activating or deactivating existing accounts and approving or rejecting new user account requests.
  - Note:** A maximum of two COMPASS user accounts are allowed for each SNP sponsor organization.
  - Note:** Pending user accounts will only be visible if the associated DRA has already been approved by the AR.

Representative Inbox | **User Agreements** Exit

### User Agreements

Below are your organization's Federal Employer Identification Number (FEIN) and CNPEARS Agreement Number/AUN.

Federal Employer Identification Number: [REDACTED]  
CNPEARS Agreement Number/AUN: 300679410  
Sponsor Name: YORK CO YOUTH DEV CENTER

Step 1: Please review the existing active user(s) for your Organization. Note: Each organization can have up to 2 active users at any time. If your organization already has 2 active users, you will have to make one or more user(s) inactive before approving additional applications in Step 2.

Action	User Id	First Name	Last Name	E-mail
<input type="button" value="v"/>	b-BalP	Bala	Parthas	C-bparthas@state.pa.us
<input type="button" value="v"/>	b-RaviKu	Ravi	Kumar	C-bparthas@state.pa.us

Step 2: Please review the new User Application for your organization. If there are no active users in Step 1 for your organization, the system will allow you to approve up to 2 new applications in Step 2. Click on the hyperlink below to print a copy of their User Agreement.

Action	User Name	Title	E-mail	Representative Name	Representative Contact
<input type="button" value="v"/>	<a href="#">Bala Parthas</a>	Mr	C-bparthas@state.pa.us	Barbara Gettys	c-kasare@state.pa.us 717-840-7570

Note: Please notify the applicant with the specific reason in case of Rejection.

# User Agreements

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## Representative Administration User Agreements

- Select the appropriate “Action” for existing or new users from the drop-down menu:
  - “Activate” – Activates an existing account.
  - “Deactivate” – Deactivates an existing account.
  - “Approve” – Approves new users.
  - “Reject” – Disapproves new users.
    - **Note:** Once a user has been deactivated or rejected the user will no longer appear on this page because a user history is not captured. If you require a record for audit or other purposes, print the screen before you continue.
- Click the “Continue” button and the “Confirm Authorization” screen will appear.

Representative Inbox | [User Agreements](#) Exit

### User Agreements

Below are your organization's Federal Employer Identification Number (FEIN) and CNPEARS Agreement Number/AUN.  
Federal Employer Identification Number: 236003050  
CNPEARS Agreement Number/AUN: 300679410  
Sponsor Name: YORK CO YOUTH DEV CENTER

Step 1: Please review the existing active user(s) for your Organization. Note: Each organization can have up to 2 active users at any time. If your organization already has 2 active users, you will have to make one or more users inactive before approving additional applications in Step 2.

Action	User Id	First Name	Last Name	E-mail
<input type="text"/>	b-BalP	Bala	Parthas	C-bparthas@state.pa.us
Deactivate	b-Raviku	Ravi	Kumar	C-bparthas@state.pa.us

Step 2: Please review the new User Application for your organization. If there are no active users in Step 1 for your organization, the system will allow you to approve up to 2 new applications in Step 2. Click on the hyperlink below to print a copy of their User Agreement.

Action	User Name	Title	E-mail	Representative Name	Representative Contact
Approve	<a href="#">Bala Parthas</a>	Mr	C-bparthas@state.pa.us	Barbara Gettys	c-kasare@state.pa.us 717-840-7570

Note: Please notify the applicant with the specific reason in case of Rejection.

# Confirm Authorization

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## Representative Administration Confirm Authorization

- The “Confirm Authorization” screen gives ARs an opportunity to confirm account changes before sending them to DFN for further processing.
- Click the “Submit” button to perform the actions specified on the “Confirm Authorization” screen and forward the user account requests to PDE for further processing.
- Click the “Cancel” button to return to the “User Agreements” screen. This is the last opportunity to print.

Confirm Authorization

Are you sure you want to perform the following actions:

**New User Agreements Applications:**  
Bala kumar is going to be Approved.

Submit Cancel

Note: Click the "Submit" button to perform the action specified above, or the "Cancel" button to ignore the actions and return to the Representative Inbox.

# Online Password Reset

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## Online Password Reset

This section covers the Online Password Reset feature available for PDE Community Partners via COMPASS.

# Community Partner - Online Password Reset

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## Online Password Reset for PDE Community Partners

Here are the benefits of the Community Partner Password reset:

- Reduces the frequency of Community Partners having to contact the CNPEARS/COMPASS Help Desk with password reset requests. Users will be able to manage their own passwords, thus reducing the number of work delays attributable to password reset.
- A password can be reset anytime, no longer constrained to the operation hours of the CNPEARS/COMPASS Help Desk.
- The cycle time for password resetting will be reduced.

# Community Partner - Online Password Reset – Access

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## Online Password Reset Access

- From the COMPASS homepage:

[www.compass.state.pa.us](http://www.compass.state.pa.us)

- Click the “Community Partner/ Login Registration Link”
- Click the “Forgot/Change Password?” link to begin the password reset process.

The screenshot shows the COMPASS homepage with a navigation bar at the top containing links for 'Other Benefits', 'Contact Us', 'FAQ', 'Help', 'Site Map', and 'Welcome'. Below the navigation bar, there are several promotional banners and a main content area with three columns of information. The left column includes 'About COMPASS', 'Learn More About COMPASS', and 'Helpful Links'. The middle column is titled 'Learn About Benefits' and lists various services like Health Care, Home and Community Based Services Referrals, and Long Term Living Services. The right column is titled 'Community Partners' and 'Service Providers and Business Partners'. At the bottom of the page, there is a 'Community Partner Login/Registration' section with a 'Forgot/Change Password?' link.

This screenshot shows the login and registration section of the COMPASS website. It features a navigation bar with 'Other Benefits', 'Contact Us', 'FAQ', 'Help', and 'Site Map'. Below the navigation bar, there is a 'Back to COMPASS Home Page' button. The main content area contains a 'User ID' field with a 'Forgot User ID?' link, a 'Password' field with a 'Forgot/Change Password?' link, and a 'Sign In' button. Below the login fields, there is a 'Want to Become a Community Partner?' section with a 'Start Online Self Registration' button and a link to the 'Online Self-Registration Guide'.

coalitions, hospitals, church groups, sponsors of the National School Lunch Program applications for health and human services.

Registered COMPASS Community Partners have access to a centralized location to help them manage their applications. This location is commonly known as the Community Partner Dashboard and allows Community Partners to:

- Submit and track all applications in one location
- E-Sign applications on behalf of applicants
- Access saved and submitted applications for up to 180 days
- View statuses of submitted applications
- Submit documents electronically on behalf of applicants and recipients
- View quick reports of applications
- View detailed reports of applications through search function
- View messages from headquarters
- Access forms, links and other publications

If you are a Medical Assistance (MA) provider, and you use your MA provider number when filing the application, you will receive notices of your patient's eligibility, including their MA ID number for billing purposes.

### Community Partner Account Cancellation

An organization can remove itself from the list of registered COMPASS Community Partner organizations at any time by completing the Community Partner Cancellation Form.

# Forgot Password



## Online Password Reset Forgot Password

- Existing users that have forgotten their passwords will use the "Forgot Password" screen to reset their passwords.
- Enter the User ID in the "\*User ID" field.
- Click the "OK" button.
  - Note:** In order to move to the next screen, the "\*User ID" will be validated first to make sure that account exists in the system.
- Once the "\*User ID" is validated, the "Hint Question" screen will appear.

# ▶ Hint Question



## Online Password Reset Hint Question

- The “Hint Question” screen prompts the users to answer two questions based on the responses given during the registration process.
  - **Note:** For all new users registering online, three (3) hint questions and hint answers are captured during registration online.
- Enter the hint answer into the “\*Answer” field.
- Click the “OK” button.
  - **Note:** In order to move to the next screen, the “\*Answer” will be validated as the correct answer.
- Once the “\*Answer” is validated, the “Reset Password” screen will appear.

PA pennsylvania

DHS Forgotten Password Reset: Please enter the following to verify your identity

• = Required

User ID

First Name

Last Name

Password Hint

• Answer

Password Hint

• Answer

OK CANCEL

# Reset Password

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## Online Password Reset Reset Password

- The “Reset Password” screen gives users the opportunity to reset their password.
- Enter the new password in the “\*Password” and “\*Confirm Password” fields. The password will be masked as the user types it into the fields.
- **Note:** The password must adhere to the following guidelines:
  - Minimum of eight characters.
  - At least one uppercase letter.
  - At least one lowercase letter.
  - At least one number (digit).
  - At least one special character (e.g. #,\$%)
  - May neither contain the user ID, nor any part of the user’s full name.
  - May not reuse any of the ten previously used passwords.
- Click the “Submit” button to accept the New Password, and the “Confirmation” screen will appear.

A screenshot of the "DPW Forgotten Password Reset" web form. The form is titled "DPW Forgotten Password Reset" and includes a legend indicating that a red asterisk (\*) denotes a required field. The form contains several input fields: "Organization" (pre-filled with "STSPETERPA7092"), "User ID" (pre-filled with "b-t2627"), "First Name" (pre-filled with "Test"), and "Last Name" (pre-filled with "Test"). The "Password" and "Confirm Password" fields are highlighted with a red rectangular box. To the right of the form, there is a "Password Policy Requirement" section listing rules: minimum eight characters, at least one uppercase letter, at least one lowercase letter, at least one number (digit), at least one special character (e.g. #,\$%&\*), and restrictions on containing the user ID, full name, and reusing previous passwords. At the bottom right of the form, there are "Submit" and "Cancel" buttons, with the "Submit" button also highlighted by a red rectangular box.

# Reset Password



## Online Password Reset Login

- Click the "Close Window" button to return to the COMPASS Login screen.



Task Completed.

Your task is successfully submitted. Please close this browser and open a new window to log in to the system.





## Application Outbox

This section covers how to use the Application Outbox to print, save, and export household applications for school meals.

It also covers how to setup the e-mail notification to keep you informed about applications in the Outbox.

# What is Application Outbox

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## Application Outbox

- The Application Outbox receives household applications for school meals that have been submitted via the COMPASS Application for Services.
- Application Outbox allows applications to be viewed, printed (individually or several at a time), or moved to an archive location (School Meals Saved Applications) to be stored for up to four years.
- Applications in the Outbox can be used to automatically determine eligibility for the School Meals Program. COMPASS determined eligibility should be considered accurate.
- Applications can be exported for use in Point-of-Sale (POS) systems used by the SNP Sponsors.
  - **Note:** In order to use this feature, the POS system may need to be updated. Check with the software vendor for compatibility.
- COMPASS allows free and reduced price meal applications to be printed as soon as they are received or prior to CRE/SMI review. Applications must have the signatures of the approving official at the time of the review.
- Using information available through the COMPASS Application Outbox must be in accordance with federal regulations for the NSLP. Unauthorized disclosure or misuse of confidential eligibility information is strictly forbidden with penalty of fine and/or imprisonment.

# How to Access Application Outbox



### Application Outbox Access

- From the COMPASS Community Partner Dashboard (CPD) homepage, view the "Applications Outbox".
- Statistic Box – Indicates how many applications have been received by your organization in the current month.

The screenshot shows the COMPASS web application interface. At the top, there is a navigation bar with the COMPASS logo and tagline "CLICK. APPLY. BENEFIT.". Below the navigation bar, there are several menu items: Home, School Meals, and Information. On the left side, there is a sidebar with buttons for "SNAP/TANF Inquiry", "Income Verification Inquiry", "Saved Applications", "E-Mail Notification", "CNPEARS", and "Direct Certification". In the center, there is a "Messages from Headquarters" section with two messages. Below that, there is a section titled "Cumberland Valley Sd (Mechanicsburg)" which contains a "Statistic Box" and an "Applications your organization recently received (Application Outbox)" table. The "Statistic Box" shows "Your Organization has received 6 applications this month". The "Applications your organization recently received" table has the following data:

App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits		From Application				Flags
					SNAP/TANF	H	M	R	F		
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1		Y	Y	Y	Y		
<input type="checkbox"/> W27100422	neeragaferds	personamdif	3/24/2016	1							
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1		Y					
<input type="checkbox"/> W44100337	super	mom	4/28/2015	1		Y	Y	Y	Y		
<input type="checkbox"/> W91100441	super	testmom	4/28/2015	1		Y	Y	Y	Y		

At the bottom of the table, there are buttons for "PRINT", "EXPORT", and "SAVE". Below the table, there are navigation buttons: "< Previous", "Page 1 of 1", and "NEXT >".

# Welcome to Application Outbox

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## Application Outbox Homepage

- The homepage for the Application Outbox looks and functions much like a typical e-mail inbox.
- The Application Outbox table displays 20 applications per page.
- Navigation controls will appear when there are more than 20 records.

## Cumberland Valley Sd (Mechanicsburg)

Applications your organization recently received (Application Outbox)

App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits		From Application				Flags
					SNAP/TANF	H	M	R	F		
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1		Y	Y	Y	Y		
<input type="checkbox"/> W27100422	neeragaferds	personamdif	3/24/2016	1							
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1		Y					
<input type="checkbox"/> W44100337	super	mom	4/28/2015	1		Y	Y	Y	Y		
<input type="checkbox"/> W91100441	super	testmom	4/28/2015	1		Y	Y	Y	Y		

PRINT EXPORT SAVE < Previous Page 1 of 1 NEXT >

# Welcome to Application Outbox

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## Application Outbox Results – Sorting

- Sort the data in the Outbox table by clicking on any column heading.
- Sorting will organize the records based on the values in the chosen column.
  - Note:** Click the column header once for ascending (least to greatest) and twice for descending (greatest to least).
  - Note:** The sort function only sorts applications on the page you are viewing. It does not sort the entire list of application records.

## Cumberland Valley Sd (Mechanicsburg)

Applications your organization recently received (Application Outbox)

App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits		From Application				Flags
					SNAP/TANF	H	M	R	F		
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1			Y	Y	Y	Y	
<input type="checkbox"/> W27100422	neeragaferds	personamdif	3/24/2016	1							
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1			Y				
<input type="checkbox"/> W44100337	super	mom	4/28/2015	1			Y	Y	Y	Y	
<input type="checkbox"/> W91100441	super	testmom	4/28/2015	1			Y	Y	Y	Y	

PRINT EXPORT SAVE < Previous Page 1 of 1 NEXT >

# Welcome to Application Outbox

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## Application Outbox Homepage

- Each row contains the following application information:
  - Checkbox – A selection checkbox used to select records to be saved.
  - App # – Unique Application Number assigned by COMPASS.
  - Last Name & First Name – Head of household's name.
  - Submitted Date – Date the application was completed and submitted to COMPASS.
  - NSLP – Number of students on this application applying to the school meals program for your school district\*.
  - SNAP/TANF – If at least one of the applicants\*\* is currently receiving Food Stamps or TANF.
  - Living Situation Indicators \*\* –
    - H – If the child is homeless.
    - M – If the child is a migrant.
    - R – If the child is a runaway.
    - E – If the child is a foster child.
  - Flags – “D” will appear for any duplicate applications submitted through COMPASS for the current school year regardless of the organization that submitted it.
- Sort the data in the Outbox table by clicking on any column heading.

## Cumberland Valley Sd (Mechanicsburg)

Applications your organization recently received (Application Outbox)

	App #	Last Name	First Name	Submitted Date ▼	NSLP	Welfare Benefits		From Application			
						SNAP/TANF	H	M	R	F	Flags
<input type="checkbox"/>	W27100422	ONE	KID	3/24/2016	1		Y	Y	Y	Y	
<input type="checkbox"/>	W27100422	neeragaferds	personamdif	3/24/2016	1						
<input type="checkbox"/>	W77100480	Doe	John	3/21/2016	1		Y				
<input type="checkbox"/>	W44100337	super	mom	4/28/2015	1		Y	Y	Y	Y	
<input type="checkbox"/>	W91100441	super	testmom	4/28/2015	1		Y	Y	Y	Y	

PRINT EXPORT SAVE < Previous Page 1 of 1 NEXT >

\* **Note:** The NSLP number may be different than the total number of children applying in one application. A household may include children that attend two or more different sponsor schools.

\*\* **Note:** SNAP/TANF and Living Situation Indicators apply to applicants in your school only. The actual application will show all eligible children regardless of the schools they attend.

# Working with Application Outbox



## Application Outbox Single Application – Access

- To access an individual application from the School Meals Outbox, click the “App #” of the desired record.
- A “File Download” window will appear asking whether you want to “Open,” “Save” or “Cancel.”
  - Click “Open” to view and/or print the application immediately.
  - Click “Save” to save the application to the desired location.
  - Click “Cancel” to cancel the operation and close the “File Download” window.
- Click “Open” and the application will be displayed in Adobe Acrobat.

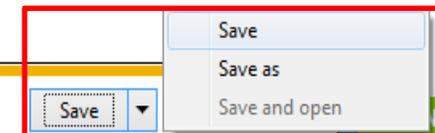
## Cumberland Valley Sd (Mechanicsburg)

Applications your organization recently received (Application Outbox)

App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits		From Application				Flags
					SNAP/TANF	H	M	R	F		
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1			Y	Y	Y	Y	
<input type="checkbox"/> W27100422	neeragaferds	personamdf	3/24/2016	1							
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1			Y				
<input type="checkbox"/> W44100337	super	mom	4/28/2015	1			Y	Y	Y	Y	
<input type="checkbox"/> W91100441	super	testmom	4/28/2015	1			Y	Y	Y	Y	

PRINT EXPORT SAVE < Previous Page 1 of 1 NEXT >

Do you want to save W979999990460.pdf (14.4 KB) from compass-int.dpw.state.pa.us?



# Working with Application Outbox

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## Application Outbox Single Application – View, Print, Save

- Use the Adobe Acrobat tool bar to view, print or save the application.
- **Note:** Instructions for viewing and printing multiple applications are provided on the next page.

**2015-2016 FREE AND REDUCED PRICE SCHOOL MEALS FAMILY APPLICATION** eForm: W27100422

**PART 1. BENEFITS:** IF ANY MEMBER OF YOUR HOUSEHOLD RECEIVES [State SNAP] OR [State TANF Cash Assistance], PROVIDE THE NAME AND CASE NUMBER FOR THE PERSON WHO RECEIVES BENEFITS AND SKIP TO PART 3 AND ONLY fill out the child's name, grade and school the child attends. IF NO ONE RECEIVES THESE BENEFITS, SKIP TO PART 2.  
 NAME: personamdf neeragaferds CASE NUMBER: 07/8007071

**PART 2. IF ANY CHILD YOU ARE APPLYING FOR IS HOMELESS, MIGRANT, OR A RUNAWAY CHECK THE APPROPRIATE BOX AND CALL [your school, homeless liaison, migrant coordinator at phone #]**  
 HOMELESS  MIGRANT  RUNAWAY

**PART 3. TOTAL HOUSEHOLD GROSS INCOME.** You must tell us how much and how often.

1. NAME (List all household members, include grade of school aged child)	Check if a foster child (legal responsibility of welfare agency or court)	Name of School child attends	2. GROSS INCOME AND HOW OFTEN IT WAS RECEIVED				Check if NO income
			Earnings From Work before deductions	Welfare, child support, alimony	Pensions, retirement, Social Security, SSI, VA benefits	All Other Income	
Kid One, 8	<input checked="" type="checkbox"/>	CUMBERLAND VALLEY HS				\$0/Monthly	<input type="checkbox"/>
	<input type="checkbox"/>						<input type="checkbox"/>
	<input type="checkbox"/>						<input type="checkbox"/>
	<input type="checkbox"/>						<input type="checkbox"/>

**PART 4. SIGNATURE AND LAST FOUR DIGITS OF SOCIAL SECURITY NUMBER (ADULT MUST SIGN BELOW)**  
 An adult household member must sign the application. If Part 3 is completed, the adult signing the form also must list the last four digits of his or her Social Security Number or mark the "I do not have a Social Security Number" box. (See Privacy Act Statement on the Parent/Guardian letter.)  
 I certify (promise) that all information on this application is true and that all income is reported. I understand that the school will get Federal funds based on the information I give. I understand that school officials may verify (check) the information. I understand that if I purposely give false information, my children may lose meal benefits, and I may be prosecuted.  
 Sign Here: ELECTRONIC SIGNATURE Print Name: Date: 3/24/2016 10:12:33 AM  
 Address: 300 corporate dr City: camp hill State: PA ZIP Code: 17011  
 Phone Number: Last four digits of Social Security Number:  I do not have a Social Security Number

**PART 5. CHILDREN'S ETHNIC AND RACIAL IDENTITIES (OPTIONAL)**  
 Choose one ethnicity: Choose one ethnicity:  
 Hispanic/Latino  Not Hispanic/Latino  Asian  American Indian or Alaska Native  Black or African American  White  Native Hawaiian or Other Pacific  Other

DO NOT FILL OUT THIS PART. THIS IS FOR SCHOOL USE ONLY.

Annual Income Conversion: Weekly x 52, Every 2 Weeks x 26, Twice a Month x 24, Monthly x 12

# Application Outbox – Buttons



## Application Outbox Buttons

- The Print, Export and Save buttons are located directly below the Outbox table on the CP dashboard
- The button allow users to perform several tasks on applications in the Outbox:
  - Print – Enables the printing of multiple applications at one time.
  - Export – Exports the application data to a .csv file so it can be used with schools' Point-of-Sales (POS) software.
  - Save – Moves Outbox applications to School Meals Saved Applications for long-term storage.
    - Note:** Further details are provided in the School Meals "Saved Applications" training section.

## Cumberland Valley Sd (Mechanicsburg)

Applications your organization recently received (Application Outbox)

■	App #	Last Name	First Name	Submitted Date ▼	NSLP	Welfare Benefits		From Application				Flags
						SNAP/TANF		H	M	R	F	
<input type="checkbox"/>	W27100422	ONE	KID	3/24/2016	1			Y	Y	Y	Y	
<input type="checkbox"/>	W27100422	neeragaferds	personamdif	3/24/2016	1							
<input type="checkbox"/>	W77100480	Doe	John	3/21/2016	1			Y				
<input type="checkbox"/>	W44100337	super	mom	4/28/2015	1			Y	Y	Y	Y	
<input type="checkbox"/>	W91100441	super	testmom	4/28/2015	1			Y	Y	Y	Y	

# Application Outbox – Print

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## Application Outbox Print

- The “Print” function allows multiple applications to be viewed, saved, and printed.
- Select the applications to be printed by clicking on the checkbox(es) next to the desired record(s) or click the Checkbox in the top header to select all of the applications on the page.
  - **Note:** Up to 20 applications can be selected. More than one application must be selected to avoid an error.
  - **Note:** When several records are selected to be printed, the system will function slower than printing an individual record.

## Cumberland Valley Sd (Mechanicsburg)

### Applications your organization recently received (Application Outbox)

■	App #	Last Name	First Name	Submitted Date ▼	NSLP	Welfare Benefits		From Application				Flags
						SNAP/TANF	H	M	R	F		
<input type="checkbox"/>	W27100422	ONE	KID	3/24/2016	1		Y	Y	Y	Y		
<input type="checkbox"/>	W27100422	neeragaferds	personamdif	3/24/2016	1							
<input type="checkbox"/>	W77100480	Doe	John	3/21/2016	1		Y					
<input type="checkbox"/>	W44100337	super	mom	4/28/2015	1		Y	Y	Y	Y		
<input type="checkbox"/>	W91100441	super	testmom	4/28/2015	1		Y	Y	Y	Y		

PRINT

EXPORT

SAVE

< Previous

Page 1 of 1

NEXT >

# Application Outbox – Print

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## Application Outbox Print

- Once the desired applications are selected for printing, click “Print” button.
- A “File Download” window will appear asking whether you wish to “Open,” “Save,” or “Cancel.”
  - Click “Open” to view and/or print the application immediately.
  - Click “Save” to save the application to a desired location.
  - Click “Cancel” to return to the operator and close the window.
- Click “Open” and the applications will be displayed in Adobe Acrobat.
  - Note:** Adobe Acrobat 9.0 or better is required to use COMPASS. To obtain a free copy of Adobe Acrobat go to [www.pears.ed.state.pa.us](http://www.pears.ed.state.pa.us) and click on the “Adobe Acrobat Reader” link.

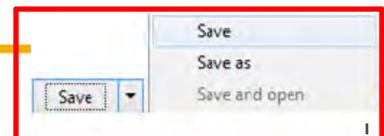
## Cumberland Valley Sd (Mechanicsburg)

Applications your organization recently received (Application Outbox)

App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits		From Application				Flags
					SNAP/TANF	H	M	R	F		
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1			Y	Y	Y	Y	
<input type="checkbox"/> W27100422	neeragaferds	personamdif	3/24/2016	1							
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1			Y				
<input type="checkbox"/> W44100337	super	mom	4/28/2015	1			Y	Y	Y	Y	
<input type="checkbox"/> W91100441	super	testmom	4/28/2015	1			Y	Y	Y	Y	

PRINT EXPORT SAVE < Previous Page 1 of 1 NEXT >

Do you want to save SchoolMealsApplications-3.pdf (37.5 KB) from hsavevweb001.dpw.state.pa.us?



# Application Outbox – Print

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## Application Outbox

### Multiple Applications – View, Print, Save

- Use the Adobe Acrobat tool bar to view, print or save the applications.
  - Note:** This file, unlike the one in the previous example, will include multiple school meals applications.

**2015-2016 FREE AND REDUCED PRICE SCHOOL MEALS FAMILY APPLICATION** eForm: W27100422

**PART 1. BENEFITS:** IF ANY MEMBER OF YOUR HOUSEHOLD RECEIVES [State SNAP] OR [State TANF Cash Assistance], PROVIDE THE NAME AND CASE NUMBER FOR THE PERSON WHO RECEIVES BENEFITS AND SKIP TO PART 3 AND ONLY fill out the child's name, grade and school the child attends. IF NO ONE RECEIVES THESE BENEFITS, SKIP TO PART 2.  
 NAME: personamdf neeragaferds CASE NUMBER: 07/8007071

**PART 2. IF ANY CHILD YOU ARE APPLYING FOR IS HOMELESS, MIGRANT, OR A RUNAWAY CHECK THE APPROPRIATE BOX AND CALL [your school, homeless liaison, migrant coordinator at phone #]**  
 HOMELESS  MIGRANT  RUNAWAY

**PART 3. TOTAL HOUSEHOLD GROSS INCOME.** You must tell us how much and how often.

1. NAME (List all household members, include grade of school aged child)	Check if a foster child (legal responsibility of welfare agency or court)	Name of School child attends	2. GROSS INCOME AND HOW OFTEN IT WAS RECEIVED				Check if NO income
			Earnings From Work before deductions	Welfare, child support, alimony	Pensions, retirement, Social Security, SSI, VA benefits	All Other Income	
Kid One, 8	<input checked="" type="checkbox"/>	CUMBERLAND VALLEY HS				\$0/Monthly	<input type="checkbox"/>
	<input type="checkbox"/>						<input type="checkbox"/>
	<input type="checkbox"/>						<input type="checkbox"/>
	<input type="checkbox"/>						<input type="checkbox"/>

**PART 4. SIGNATURE AND LAST FOUR DIGITS OF SOCIAL SECURITY NUMBER (ADULT MUST SIGN BELOW)**  
 An adult household member must sign the application. If Part 3 is completed, the adult signing the form also must list the last four digits of his or her Social Security Number or mark the "I do not have a Social Security Number" box. (See Privacy Act Statement on the Parent/Guardian letter.)  
 I certify (promise) that all information on this application is true and that all income is reported. I understand that the school will get Federal funds based on the information I give. I understand that school officials may verify (check) the information. I understand that if I purposely give false information, my children may lose meal benefits, and I may be prosecuted.  
 Sign Here: ELECTRONIC SIGNATURE Print Name: Date: 3/24/2016 10:12:33 AM  
 Address: 300 corporate dr City: camp hill State: PA ZIP Code: 17011  
 Phone Number: Last four digits of Social Security Number:  I do not have a Social Security Number

**PART 5. CHILDREN'S ETHNIC AND RACIAL IDENTITIES (OPTIONAL)**  
 Choose one ethnicity: Choose one ethnicity:  
 Hispanic/Latino  Not Hispanic/Latino  Asian  American Indian or Alaska Native  Black or African American  White  Native Hawaiian or Other Pacific  Other

DO NOT FILL OUT THIS PART. THIS IS FOR SCHOOL USE ONLY.

Annual Income Conversion: Weekly x 52, Every 2 Weeks x 26, Twice a Month x 24, Monthly x 12

# Application Outbox – Save



## Application Outbox Save

- Selecting application(s) and clicking the "Save" button moves applications from the "Application Outbox" into the "School Meals Saved Applications" feature.
- "Saved Applications" provides online long-term (4 years from date of save) storage for processed applications.
  - **Note:** Unsaved applications in the School Meals Outbox will be purged within a year of their submission date.
- Select the application(s) to be saved by clicking on the checkbox(es) next to the desired record(s) or click the check box in header to select all of the applications on the page.
  - **Note:** Up to 20 applications can be selected.

## Cumberland Valley Sd (Mechanicsburg)

Applications your organization recently received (Application Outbox)

■	App #	Last Name	First Name	Submitted Date ▼	NSLP	Welfare Benefits		From Application				Flags
						SNAP/TANF	H	M	R	F		
<input type="checkbox"/>	W27100422	ONE	KID	3/24/2016	1			Y	Y	Y	Y	
<input type="checkbox"/>	W27100422	neeragaferds	personamdif	3/24/2016	1							
<input type="checkbox"/>	W77100480	Doe	John	3/21/2016	1			Y				
<input type="checkbox"/>	W44100337	super	mom	4/28/2015	1			Y	Y	Y	Y	
<input type="checkbox"/>	W91100441	super	testmom	4/28/2015	1			Y	Y	Y	Y	

# Application Outbox – Save



## Application Outbox Save

- After selecting the application(s) to be saved to "Saved Applications," click "Save" button
- The page will refresh and the selected applications will no longer appear in the Outbox table.
- These applications are now available through the "School Meals Saved Applications" feature.
- A message confirming that the applications were successfully saved to "School Meals Saved Applications" should be visible near the top of the browser.
  - **Note:** Further details about the "School Meals Saved Applications" feature are covered in the "School Meals Saved Applications" section of training.

## Cumberland Valley Sd (Mechanicsburg)

Applications your organization recently received (Application Outbox)

App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits		From Application				Flags
					SNAP/TANF	H	M	R	F		
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1			Y	Y	Y	Y	
<input type="checkbox"/> W27100422	neeragaferds	personamdif	3/24/2016	1							
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1			Y				
<input type="checkbox"/> W44100337	super	mom	4/28/2015	1			Y	Y	Y	Y	
<input type="checkbox"/> W91100441	super	testmom	4/28/2015	1			Y	Y	Y	Y	

Page 1 of 1

# Application Outbox – Export



## Application Outbox Export

- The “Export” function exports application data to a .csv file so that it can be used by schools’ Point of Sales (POS) systems.
  - Note:** Some POS software may require modifications to accept COMPASS data. Check with the POS vendor for more details.
- Select the applications to be exported by clicking on the checkbox(es) next to the desired record(s) or click check checkbox in the header to select all of the applications on the page.
- 20 applications can be selected to export at one time.

## Cumberland Valley Sd (Mechanicsburg)

Applications your organization recently received (Application Outbox)

App #	Last Name	First Name	Submitted Date ▼	NSLP	Welfare Benefits		From Application				Flags
					SNAP/TANF	H	M	R	F		
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1			Y	Y	Y	Y	
<input type="checkbox"/> W27100422	neeragaferds	personamdif	3/24/2016	1							
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1			Y				
<input type="checkbox"/> W44100337	super	mom	4/28/2015	1			Y	Y	Y	Y	
<input type="checkbox"/> W91100441	super	testmom	4/28/2015	1			Y	Y	Y	Y	

# Application Outbox – Export



## Application Outbox Export

- Once the desired applications are selected for exporting, select “Export” button
- A “File Download” window will appear asking whether you wish to “Open,” “Save” or “Cancel.”
  - Click “Open” to view and/or print the application immediately.
  - Click “Save” to save the application to the desired location.
  - Click “Cancel” to return to the operation and close the window.
- Click “Open” and the application will be displayed .csv file

## Cumberland Valley Sd (Mechanicsburg)

Applications your organization recently received (Application Outbox)

App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits		From Application				Flags
					SNAP/TANF	H	M	R	F		
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1		Y	Y	Y	Y		
<input type="checkbox"/> W27100422	neeragaferds	personamdif	3/24/2016	1							
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1		Y					
<input type="checkbox"/> W44100337	super	mom	4/28/2015	1		Y	Y	Y	Y		
<input type="checkbox"/> W91100441	super	testmom	4/28/2015	1		Y	Y	Y	Y		

PRINT EXPORT SAVE < Previous Page 1 of 1 NEXT >

Do you want to save SchoolMealsApplications-3.csv (230 bytes) from hsavevweb001.dpw.state.pa.us?



# Application Outbox – Export

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## Application Outbox Export

- Use the tool bar to change the view, print or save the export data.
- To Print: Click “File”, located in the top left area of the screen. A drop-down box will appear. Click “Print” to print the document
  - **Note:** Information regarding the formatting of the data can be obtained by accessing PEARS, in Form Download, Form PDE155t
  - **Note:** The POS vendor should be able to provide specific information about moving the data into the POS system.

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K
1	App #	Last Name	First Name	Submitted Date	NSLP	FS/TANF	H	M	R	F	Flags
2	W27100422	ONE	KID	2016-03-24T10	1		Y	Y	Y	Y	
3	W27100422	neeragaferds	personamdif	2016-03-24T10	1						
4	W77100480	Doe	John	2016-03-21T12	1		Y				
5											

# Application Eligibility

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## Application Outbox Application – Eligibility

- When an application for school meals is submitted to COMPASS, COMPASS automatically determines eligibility for each applicant.
- Results of the eligibility determination can be found at the bottom of an application. More than one eligibility category may be shown if children on the application qualify for different eligibilities.
- COMPASS application eligibility results can be considered valid and final. However, spot checking for errors is recommended.
- The household never sees the application or the eligibility results. The NSLP Sponsor **is** responsible for notifying the family.

DO NOT FILL OUT THIS PART. THIS IS FOR SCHOOL USE ONLY.

Annual Income Conversion: Weekly x 52, Every 2 Weeks x 26, Twice A Month x 24 Monthly x 12

Total Income: \_\_\_\_\_ Per:  Week,  Every 2 Weeks,  Twice A Month,  Month,  Year Household Size: 1

Categorical Eligibility  Date Withdrawn: \_\_\_\_\_ Eligibility: Free  Reduced  Denied  Reason: See Page 3

Temporary: Free  Reduced  Time Period: \_\_\_\_\_ (expires after \_\_\_\_\_ days)

Determining Official's Signature: \_\_\_\_\_ Date: \_\_\_\_\_ Confirming Official's Signature (cannot be the Determining Official): \_\_\_\_\_ Date: \_\_\_\_\_

Signature of School Employee Completing Verification: \_\_\_\_\_ Date: \_\_\_\_\_

# Application Eligibility

COMMONWEALTH OF PENNSYLVANIA ACCESS TO SOCIAL SERVICES

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## Application Outbox

### Application – Eligibility

- In the “school use only” section of the application, COMPASS will calculate and display the household total income, the household size, and all applicable eligibilities for this application.
  - **Note:** This is found in the grey area when you open the application.
- COMPASS provides the options to print or save free or reduced price meal applications upon receipt, or at a later date, prior to the scheduled Coordinated Review Effort (CRE). COMPASS applications must have the signatures of the approving official at the time of the review.

DO NOT FILL OUT THIS PART. THIS IS FOR SCHOOL USE ONLY.	
Annual Income Conversion: Weekly x 52, Every 2 Weeks x 26, Twice A Month x 24 Monthly x 12	
Total Income: _____	Per: <input type="checkbox"/> Week, <input type="checkbox"/> Every 2 Weeks, <input type="checkbox"/> Twice A Month, <input type="checkbox"/> Month, <input type="checkbox"/> Year Household Size: <u>1</u>
Categorical Eligibility <input checked="" type="checkbox"/>	Date Withdrawn: _____ Eligibility: Free <input checked="" type="checkbox"/> Reduced <input type="checkbox"/> Denied <input type="checkbox"/> Reason: <u>See Page 3</u>
Temporary: Free <input type="checkbox"/> Reduced <input type="checkbox"/>	Time Period: _____ (expires after _____ days)
Determining Official's Signature: _____	Date: _____ Confirming Official's Signature (cannot be the Determining Official): _____ Date: _____
Signature of School Employee Completing Verification: _____	Date: _____

# Application Eligibility



**Application Outbox**  
**Application – Eligibility**

- Eligibility for each individual and the reason for the eligibility is provided in the “Application Results” section on the supplemental page (page 2) of the household application.
- Reasons for eligibility include:
  - Living Situation – The student is homeless (H), migrant (M), or a runaway (R).
  - SNAP/TANF – The student has an active Food Stamp or TANF case number that is not on the Direct Certification List.
  - DC – The student is on the Direct Certification List.
  - Income – The student’s household has an income that categorizes them eligible for free, eligible for reduced, or not eligible.
  - EXT – The student has had benefits extended based on a household member who has an active Food Stamp or TANF case number that is not on the Direct Certification List.

Application Results					
Student Name	Living Situation	TANF/FS	DC	Income	Eligibility
b test	R				MUST CONFIRM
c test		X			Free
d test			X		Free
e test				X	Free

# Application Eligibility



**Application Outbox**  
**Application – Eligibility**

- The eligibility column displays the final eligibility conclusion COMPASS reached for the student.
- Eligibilities include:
  - Free – Student determined eligible for free school meals.
  - Reduced – Student determined eligible for reduced price school meals.
  - MUST CONFIRM – Student has been determined eligible for free meals based on their living situation (i.e., homeless or runaway). However, this situation must be confirmed with the appropriate official within the school.
  - TEMP MUST CONFIRM – The household has reported that they have no income, but income confirmation has not been made. Pending the confirmation of the household income, the student is temporarily eligible for free meals. The sponsor must follow up with the household to confirm income. If the sponsor confirms there is no income, the student may remain temporary for up to 45 days. After this time, a follow up to reconfirm the status of income must be performed by the sponsor.
  - DENIED – Student was determined not eligible for free or reduced price school meals.
  - EXTENDED ELIGIBILITY – Student has been determined eligible for free meals based on a member in their household.

Application Results					
Student Name	Living Situation	TANF/FS	DC	Income	Eligibility
b test	R				MUST CONFIRM
c test		X			Free
d test			X		Free
e test				X	Free

# E-mail Notification



## E-mail Notification Setup

- Open the “E-mail Notification Setup” page by clicking the “E-mail Notification” link from the Community Partner Dashboard (CPD) homepage
- Once e-mail notification is setup, e-mail accounts will receive notification whenever an application is received in the School Meals Outbox.
- Up to Five e-mail addresses can be entered into the E-mail Notification table.
- E-mail Notifications will be received daily until there are no applications in the Outbox.
  - **Note:** Make sure the COMPASS e-mail address [COMPASSMail@state.pa.us](mailto:COMPASSMail@state.pa.us) is added to your e-mail “Safe Senders” list. Your e-mail administrator should be able to assist with this.
- Access to COMPASS is not needed to receive e-mail notifications. However, access to COMPASS is needed to setup the notifications and/or check for new applications in the School Meals Outbox.
  - **Note:** All addresses must be current and correct.

The screenshot shows the COMPASS web application interface. At the top, there is a navigation bar with the COMPASS logo and tagline 'CLICK. APPLY. BENEFIT.'. Below the navigation bar, there are several menu items: Home, School Meals, and Information. A sidebar on the left contains buttons for various services: SNAP/TANF Inquiry, Income Verification Inquiry, Saved Applications, E-Mail Notification, CNPEARS, and Direct Certification. A green box on the left indicates that the organization has received 6 applications this month. The main content area displays 'Messages from Headquarters' with two messages. Below this, the organization name 'Cumberland Valley Sd (Mechanicsburg)' is shown. The 'Applications your organization recently received (Application Outbox)' section contains a table with the following data:

	App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits	From Application				Flags
						SNAP/TANF	H	M	R	F	
<input type="checkbox"/>	W27100422	ONE	KID	3/24/2016	1		Y	Y	Y	Y	
<input type="checkbox"/>	W27100422	neeragaferds	personamdif	3/24/2016	1						
<input type="checkbox"/>	W77100480	Doe	John	3/21/2016	1		Y				
<input type="checkbox"/>	W44100337	super	mom	4/28/2015	1		Y	Y	Y	Y	
<input type="checkbox"/>	W91100441	super	testmom	4/28/2015	1		Y	Y	Y	Y	

At the bottom of the table, there are buttons for PRINT, EXPORT, and SAVE, along with navigation controls for Previous, Page 1 of 1, and NEXT.

# E-mail Notification

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## E-mail Notification Setup

- Setup e-mail notification by clicking “Add E-mail” Button
- A pop window will appear and enter e-mail address into the “E-mail Addresses” text boxes.
- Then, click the “Save” button to add email address or “Cancel” the addition
- To delete an e-mail address, click on the check box, then click the “Delete” button.
  - **Note:** Make sure the COMPASS e-mail address [COMPASSMail@state.pa.us](mailto:COMPASSMail@state.pa.us) is added to your e-mail “Safe Senders” list. Your e-mail administrator should be able to assist with this.

The screenshot shows the 'Email Notification Setup' page on the COMPASS website. The page title is 'Email Notification Setup' and the subtitle is 'Email notifications are sent to these e-mail addresses whenever there are applications that have not been processed in the Outbox.' Below the subtitle is a list of email addresses with checkboxes for deletion:

- c-masriniv@pa.gov
- c-kunapate@pa.gov
- bkataria@deloitte.com
- test@pa.gov

At the bottom of the list are two buttons: 'DELETE' and 'ADD E-MAIL'. A red box highlights these two buttons. Below the main screenshot is a smaller screenshot of the 'Add Email Address' pop-up window. It has a text input field labeled 'Email Address' and two buttons: 'SAVE' and 'CANCEL'. A red box highlights these two buttons.



## Saved Applications

This section covers how to use the Saved Applications feature, which provides a long-term storage option for online applications.

# What is Saved Applications



## Saved Applications

- The Saved Applications feature stores household applications for school meals that have been submitted via the COMPASS Application for Services and saved from the Application Outbox.
- The Save Applications feature provides long-term online storage (up to four years from time of save) for applications.
- The Saved Applications feature allows applications to be viewed, printed (individually or several at a time) or saved via Adobe Acrobat.
- Applications, to which the Application Outbox “Save” feature was applied, can be viewed through the Saved Applications feature.
  - **Note:** Only applications saved using the Application Outbox “Save” feature can be viewed in Saved Applications. Application records residing in the Application Outbox cannot be accessed using the Saved Applications feature.
- Saved Applications records can be exported for use in customized Point-of-Sale (POS) systems.
  - **Note:** In order to use this feature, the POS system may need to be updated. Check with the POS software vendor for compatibility.
- COMPASS allows free and reduced price meal applications to be printed as soon as they are received or prior to CRE/SMI review. Applications must have the signatures of the approving official at the time of the review.
- Using information available through the COMPASS Saved Applications must be in accordance with federal regulations for the NSLP. Unauthorized disclosure or misuse of confidential eligibility information is strictly forbidden with penalty of fine and/or imprisonment.

# How to Access Saved Applications



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## Saved Applications Access

- From the COMPASS Community Partner Dashboard (CPD) homepage, click on the "Saved Applications" button.

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PA STATE AGENCIES - PA ONLINE SERVICES -

Home School Meals Information

SNAP/TANF Inquiry

Income Verification Inquiry

**Saved Applications**

E-Mail Notification

CNPEARS

Messages from Headquarters

03/23/2016	t-supera	NSLP Application INT Teting to begin soon INT Testing is starting soon. Please complete the Development and close all the tasks
03/18/2016	B-TCOMMUNITY	NSLP Dashboard NSLP Dashboard 123 feddf

Cumberland Valley Sd (Mechanicsburg)

COMPASS  
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PA STATE AGENCIES - PA ONLINE SERVICES -

Other Benefits Contact Us FAQ Help Site Map Welcome, Test

### Saved Applications

Application Search [Clear](#)

Application #	Date From	Date To	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Last Name	First Name	SSN	Date Of Birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

SEARCH

# Welcome to Saved Applications

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## Saved Applications Homepage

- Search criteria available to find applications include:
  - Application # – Unique identification # assigned by COMPASS during application submission.
  - Date From – Earliest date an application was submitted.
  - Date To – Latest Date an application was submitted.
  - Last Name – For any individual on an application.
  - First Name – For any individual on an application.
  - SSN – Social Security Number for any individual on an application.
  - Date of Birth – For any individual on an application.
- Searches can be performed using one, several or all of the search criteria.
  - **Note:** At least one search criteria is needed to search or an error will occur.

COMPASS  
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Other Benefits Contact Us FAQ Help Site Map Welcome, Test

### Saved Applications

Application Search [Clear](#)

Application # W78100402	Date From	Date To	
Last Name	First Name	SSN	Date Of Birth

SEARCH

**\*Note:** Wildcard values (i.e., %, \*, etc.) are not recognized.

**\*Note:** The more search criteria selected, the more restrictive the search will become, and the smaller the potential list of matches becomes.

# ▶ Saved Applications – Search



### Saved Applications SEARCH – Application #

- To search by COMPASS application number, enter the complete COMPASS application number into the “Application #” field and click the “SEARCH” button.
- The page will reload and the application(s) matching the search criteria will be displayed beneath the search criteria table.
- Click the “Clear” button to clear the search criteria.
- Search results can be exported to a .csv file

COMPASS  
CLICK. APPLY. BENEFIT.

Other Benefits Contact Us FAQ Help Site Map Welcome, Test

### Saved Applications

Application Search [Clear](#)

Application # W78100402	Date From	Date To	
Last Name	First Name	SSN	Date Of Birth

SEARCH

### Application Results

	App #	Last Name	First Name	Submitted Date ▼	NSLP	Welfare Benefits SNAP/TANF	From Application				Flags
							H	M	R	F	
<input type="checkbox"/>	W78100402	Test	Test	3/9/2016	1						

EXPORT < Previous Page 1 of 1 NEXT >

# Saved Applications – Search

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## Saved Applications SEARCH – Date From and Date To

- To search using the “Date From” or “Date To” criteria, enter one or both of the date fields, and click the “SEARCH” button.
  - Note:** A complete date including month, day, and four digit year (mm-dd-yyyy) must be entered. Partial dates will not be accepted.
- If a search is performed using the “From Date” only, the search will retrieve application records submitted from that date through the current date.
- If a search is performed using the “To Date” only, the search will retrieve application records submitted up to and including the “To Date” of application records saved from the Outbox.
- Enter both date fields to locate applications submitted between and including the two dates.
- Click the “SEARCH” button and applications matching the date criteria will be displayed at the bottom of the screen.
- Search results can be exported to a .csv file

The screenshot shows the COMPASS web application interface. At the top, there is a navigation bar with the COMPASS logo and tagline 'CLICK. APPLY. BENEFIT.' on the left, and a user profile 'Welcome, Test' on the right. Below the navigation bar, there are links for 'Other Benefits', 'Contact Us', 'FAQ', 'Help', and 'Site Map'. The main content area is titled 'Saved Applications' and contains an 'Application Search' form. The form has fields for 'Application #', 'Date From' (03/02/2016), 'Date To' (03/23/2016), 'Last Name', 'First Name', 'SSN', and 'Date Of Birth'. A green 'SEARCH' button is located below the form. Below the search form, there is an 'Application Results' section with a table of search results. The table has columns for 'App #', 'Last Name', 'First Name', 'Submitted Date', 'NSLP', 'Welfare Benefits (SNAP/TANF)', and 'From Application' (H, M, R, F). There are four rows of results. At the bottom of the results section, there is an 'EXPORT' button and navigation controls for 'Previous', 'Page 1 of 1', and 'Next'.

App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits SNAP/TANF	From Application				Flags
						H	M	R	F	
<input type="checkbox"/> W42100437	neeragaferds	personamdif	3/24/2016	2						
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1		Y	Y	Y	Y	
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1		Y				
<input type="checkbox"/> W78100402	Test	Test	3/9/2016	1						

# Saved Applications – Search

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## Saved Applications

### SEARCH – First Name and Last Name

- Search “First Name,” “Last Name” or both by entering name(s) into the appropriate field(s).
- Click the “SEARCH” button. All applications with student name(s) that match will be displayed at the bottom of the “School Meals Saved Applications” screen.
- Search results can be exported to a .csv file
  - **Note:** A “Name” search only returns names that exactly match the name you entered. For example, if “Jone” is entered in the “Last Name” field, only application records containing someone with the last name “Jone” would appear. Applications containing individuals with the last name “Jones” would not.
  - **Note:** A “Name” search will retrieve results for all people listed in an application, including all applicants and non-applicants.

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Other Benefits Contact Us FAQ Help Site Map Welcome, Test

### Saved Applications

Application Search [Clear](#)

Application # Date From Date To

Last Name First Name SSN Date Of Birth

Doe John

SEARCH

### Application Results

	App #	Last Name	First Name	Submitted Date ▼	NSLP	Welfare Benefits SNAP/TANF	From Application H M R F	Flags
<input type="checkbox"/>	W77100480	Doe	John	3/21/2016	1		Y	

EXPORT Previous Page 1 of 1 NEXT

# ▶ Saved Applications – Search

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## Saved Applications SEARCH – SSN and Date of Birth

- Searching by “SSN” and/or “Date of Birth” (DOB) are similar to the previous search methods. Enter the criteria and click the “SEARCH” button. The results will be displayed at the bottom of the screen.
  - **Note:** Searches will only return results for an exact SSN and/or DOB match.
  - **Note:** Anything other than a complete SSN (123-45-6789) or DOB (mm-dd-yyyy) will not be accepted.

COMPASS  
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Other Benefits Contact Us FAQ Help Site Map Welcome, Test

### Saved Applications

Application Search [Clear](#)

Application # Date From Date To

Last Name First Name SSN Date Of Birth

478-96-4536 03/01/2016

SEARCH

### Application Results

	App #	Last Name	First Name	Submitted Date ▼	NSLP	Welfare Benefits SNAP/TANF	From Application				
							H	M	R	F	Flags
<input type="checkbox"/>	W77100480	Doe	John	3/21/2016	1		Y				

EXPORT < Previous Page 1 of 1 NEXT >

# Saved Applications – Results



## Saved Applications Results

- The results table for the “Saved Applications” looks and functions a lot like the typical e-mail inbox.
- Application details highlighted in the School Meals Outbox include:
  - App. # – Unique Application Number assigned by COMPASS.
  - Last Name & First Name – Head of household’s name.
  - Submitted Date – Date the application was completed and submitted to COMPASS.
  - NSLP – Number of students on this application applying to the school meals program for your school district\*.
  - SNAP/TANF – If at least one of the applicants\*\* is currently receiving Food Stamps or TANF.
  - Living Situation Indicators \*\* –
    - H – If the child is homeless.
    - M – If the child is a migrant.
    - R – If the child is a runaway.
    - E – If the child is a foster child.
  - Flags – A “D” will appear for duplicate applications submitted through COMPASS for any school district throughout the current school year.

Application Results

App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits		From Application				Flags	
					SNAP/TANF		H	M	R	F		
<input type="checkbox"/> W42100437	neeragaferds	personamdif	3/24/2016	2								
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1			Y	Y	Y	Y		
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1			Y					
<input type="checkbox"/> W78100402	Test	Test	3/9/2016	1								

EXPORT      < Previous      Page 1 of 1      NEXT >

\* **Note:** The NSLP number may be different than the total number of children applying on one application. A household may include children that attend two or more different sponsor or non-sponsor schools.

\*\* **Note:** SNAP/TANF and Living Situation Indicators apply to applicants in your school only. The actual application will show all eligible children regardless of the schools they attend.

# ▶ Saved Applications – Results



## Saved Applications Results

- “Saved Applications” results menu functions almost identical to the “School Meals Outbox.”
- The “Saved Applications” only offers the “Export” function. Therefore, multiple applications, view, save and print features are unavailable.
  - **Note:** See the “Application Outbox” section for detailed information on viewing, saving, and printing a single application.

### Application Results

■	App #	Last Name	First Name	Submitted Date ▼	NSLP	Welfare Benefits		From Application				Flags
						SNAP/TANF		H	M	R	F	
<input type="checkbox"/>	W42100437	neeragaferrds	personamdif	3/24/2016	2							
<input type="checkbox"/>	W27100422	ONE	KID	3/24/2016	1			Y	Y	Y	Y	
<input type="checkbox"/>	W77100480	Doe	John	3/21/2016	1			Y				
<input type="checkbox"/>	W78100402	Test	Test	3/9/2016	1							

EXPORT      < Previous      Page 1 of 1      NEXT >

# ▶ Saved Applications – Export



## Saved Applications Export

- The “Export” function exports application data to a .csv file so that it can be used by schools’ Point of Sales (POS) systems.
  - **Note:** Some POS software may require modifications to accept COMPASS data. Check with the POS vendor for more details.
- Select the applications to be exported by clicking on the checkbox(es) next to the desired record(s) or click the check box in the header to select all of the applications on the page.
- 20 records can be selected to export at one time.
  - **Note:** It is recommended, if you plan to “Export” applications, that you set up a folder on a network drive to export to.

Application Results

<input type="checkbox"/>	App #	Last Name	First Name	Submitted Date ▼	NSLP	Welfare Benefits		From Application				Flags
						SNAP/TANF	H	M	R	F		
<input type="checkbox"/>	W42100437	neeragaferds	personamdif	3/24/2016	2							
<input type="checkbox"/>	W27100422	ONE	KID	3/24/2016	1		Y	Y	Y	Y		
<input type="checkbox"/>	W77100480	Doe	John	3/21/2016	1		Y					
<input type="checkbox"/>	W78100402	Test	Test	3/9/2016	1							

Page 1 of 1

# ▶ Saved Applications – Export

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## Saved Applications Export

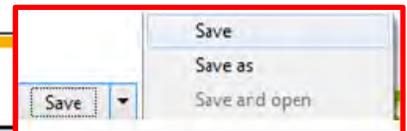
- Once the desired applications are selected for exporting, select “Export” button
- A “File Download” window will appear asking whether you wish to “Open,” “Save” or “Cancel.”
  - Click “Open” to view and/or print the application immediately.
  - Click “Save” to save the application to the desired location.
  - Click “Cancel” to return to the operation and close the “File Download” window.
  - Clicking “More Info” will bring up a MS Windows Help box.
- Click “Open” and the application will be displayed in a text file (.txt).
  - **Note:** The file will open in the default text editor.

Application Results

■	App #	Last Name	First Name	Submitted Date ▼	NSLP	Welfare Benefits		From Application				Flags
						SNAP/TANF		H	M	R	F	
<input type="checkbox"/>	W42100437	neeragaferds	personamdf	3/24/2016	2							
<input type="checkbox"/>	W27100422	ONE	KID	3/24/2016	1			Y	Y	Y	Y	
<input type="checkbox"/>	W77100480	Doe	John	3/21/2016	1			Y				
<input type="checkbox"/>	W78100402	Test	Test	3/9/2016	1							

**EXPORT**      < Previous      Page 1 of 1      NEXT >

Do you want to save **SchoolMealsApplications-3.csv** (230 bytes) from **hsavdevweb001.dpw.state.pa.us?**



# ▶ Saved Applications – Export



## Saved Applications Export

- Use the tool bar to view, print or save the export data.
  - **Note:** Information regarding the formatting of the data can be obtained by accessing PEARS, in Form Download, Form PDE155t [COMPASS Household Application Export Layout](#)
  - **Note:** The POS vendor should be able to provide specific information about moving the data into the POS system.

	A	B	C	D	E	F	G	H	I	J	K
1	App #	Last Name	First Name	Submitted Date	NSLP	FS/TANF	H	M	R	F	Flags
2	W27100422	ONE	KID	2016-03-24T10	1		Y	Y	Y	Y	
3	W27100422	neeragaferds	personamdif	2016-03-24T10	1						
4	W77100480	Doe	John	2016-03-21T12	1		Y				
5											



## Verification Inquiry

Divided into Two Sections:

1. SNAP/TANF Inquiry
2. Income Verification Inquiry

For a SNAP/TANF Inquiry this section will teach you how to validate the eligibility of an applicant by DHS Case Number, Social Security Number (SSN), Individual Information (Last Name, First Name, Date of Birth), or EBT Number.

For an Income Verification Inquiry this section will teach you how to validate the eligibility of an applicant by Social Security Number (SSN) or by Individual Information (Last Name, First Name, Date of Birth).

# What is SNAP/TANF Verification Inquiry

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[www.compass.state.pa.us](http://www.compass.state.pa.us)



## SNAP/TANF Verification Inquiry

- SNAP/TANF Verification Inquiry allows users to validate that a DHS case number provided on a paper application is valid and belongs to the applicant.
- Applications can only be verified if selected as part of the verification sample. However, the SNAP/TANF Verification Inquiry feature can assist the sponsor with completing a paper application that may be incomplete or illegible.
- Users can search by the DHS Case Number, SSN, Individual Search (Last Name, First Name, Date of Birth), or EBT (Electronic Benefits Transfer) Number of the applicant being verified.
- All households applying for SNAP or TANF are assigned a case number consisting of two parts:
  - The first two digits are the two digit county code of the household.
  - The second portion of the case number is the record number of the case within the county.
- SNAP/TANF Verification Inquiry allows users to search for SNAP/TANF numbers by county.
- Two counties can be searched at one time.
- Up to ten case records can be searched for at one time.
  - **Note:** Searches on DHS Case Numbers, Social Security Numbers, Individual Search, or EBT Number can not be performed in the same search.
- Using information available through the COMPASS Verification Inquiry must be in accordance with federal regulations for the NSLP. Unauthorized disclosure or misuse of confidential eligibility information is strictly forbidden with penalty of fine and/or imprisonment.

# How to Access SNAP/TANF Inquiry

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## SNAP/TANF Verification Inquiry Access

- From the COMPASS Community Partner Dashboard (CPD) homepage, click on the "SNAP/TANF Inquiry" button.

The screenshot shows the COMPASS Community Partner Dashboard. The 'SNAP/TANF Inquiry' button is highlighted with a red box. Below it, a green box displays 'Your Organization has received 6 applications this month'. The main content area shows 'Messages from Headquarters' and 'Applications your organization recently received (Application Outbox)'. The application outbox table is as follows:

App #	Last Name	First Name	Submitted Date	NSLP	Welfare Benefits		From Application				Flags
					SNAP/TANF	H	M	R	F		
<input type="checkbox"/> W27100422	ONE	KID	3/24/2016	1		Y	Y	Y	Y		
<input type="checkbox"/> W27100422	neeragafends	personamdf	3/24/2016	1							
<input type="checkbox"/> W77100480	Doe	John	3/21/2016	1		Y					
<input type="checkbox"/> W44100337	super	mom	4/28/2015	1		Y	Y	Y	Y		
<input type="checkbox"/> W91100441	super	testmom	4/28/2015	1		Y	Y	Y	Y		

# Welcome to SNAP/TANF Inquiry

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## SNAP/TANF Inquiry Homepage

- SNAP/TANF Inquiry allows users to verify that a SNAP/TANF case number provided on a paper application is valid and belongs to the applicant.
- Searches can be performed by either SNAP/TANF Case Number(s) Social Security Number(s), Individual Search, or EBT Number (Found on the ACCESS Card).
- A total of 5 “Case Record Numbers” can be searched at the same time. Up to five “Case Number Records” for one county.
- Five SSNs can be searched at one time.
  - **Note:** SNAP/TANF case numbers, SSN(s), Individual Search and EBT Number can not be searched simultaneously.

The screenshot shows the SNAP/TANF Inquiry homepage. At the top, there is a navigation bar with links for 'Other Benefits', 'Contact Us', 'FAQ', 'Help', 'Site Map', and 'Welcome, Test'. Below this is a breadcrumb trail: 'Home > School Meals > Information'. The main heading is 'SNAP/TANF Inquiry'. A note states: 'This page will allow you to search by Case Numbers; Social Security Numbers; Individual Search or EBT Number to receive the most current information. Only one category can be searched at a time.' There is a 'Clear' link. The search options are: 1. 'DHS Case Numbers' (highlighted with a red box) with five 'County/Case Number' input fields. 2. 'OR' 3. 'Social Security Numbers' (highlighted with a red box) with five 'SSN' input fields (SSN 1-5) and a clear 'x' button. 4. 'OR' 5. 'Individual Search' (highlighted with a red box) with fields for 'Last Name', 'First Name', 'DOB', and a 'Gender' dropdown menu. 6. 'OR' 7. 'EBT Number' (highlighted with a red box) with one 'EBT Number' input field and a 'Click image for larger display' button. A green 'SEARCH' button is at the bottom right.

# Working with SNAP/TANF Inquiry – Case Record Numbers

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## SNAP/TANF Inquiry SEARCH – Case Record Numbers

- All households applying for SNAP/TANF are provided a case number consisting of two parts.
  - The first two digits are the two digit county code of the household. The second portion of the case number is the record number of the case within the county.(seven digit number).
- To search for SNAP/TANF numbers, enter the County Code for one county and enter up to five case numbers per county.
- Click the “SEARCH” button at the bottom of the screen
  - Note:** Clear the search criteria by clicking the “Clear” button.
  - Note:** SNAP/TANF case numbers SSN, Individual Search, and EBT Number can not be searched simultaneously.
- The Search Results will appear at the bottom of the screen

# Working with SNAP/TANF Inquiry – Social Security Numbers

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## SNAP/TANF Inquiry SEARCH – Social Security Numbers

- To search by SSN, enter up to five SSNs in the “Social Security Numbers” table.
- Click the “SEARCH” button at the bottom of the screen.
  - Note:** Clear the search criteria by clicking the “Clear” button.
  - Note:** SNAP/TANF case numbers SSN(s), Individual Search, and EBT Number can not be searched simultaneously.
- The search results will appear at the bottom of the screen.

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COMPASS  
CLICK. APPLY. BENEFIT.

Other Benefits Contact Us FAQ Help Site Map Welcome, Test

Home School Meals Information

### SNAP/TANF Inquiry

This page will allow you to search by Case Numbers, Social Security Numbers, Individual Search or EBT Number to receive the most current information. Only one category can be searched at a time. [Clear](#)

#### DHS Case Numbers

County/Case Number County/Case Number County/Case Number County/Case Number County/Case Number

OR

#### Social Security Numbers

SSN 1	SSN 2	SSN 3	SSN 4	SSN 5
546-78-5236	657-83-2445	344-54-5544	555-54-4555	586-43-3455

OR

#### Individual Search

Last Name \* First Name \* DOB \* Gender --Select--

OR

#### EBT Number

EBT Number  (Click image for larger display)

SEARCH

# Working with SNAP/TANF Inquiry – Social Security Numbers



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## SNAP/TANF Inquiry SEARCH – Social Security Numbers

- The SSN search results displayed on the bottom of the screen shows if the household is currently receiving SNAP/TANF benefits.
- Please note that a household will be bundled into one record, as opposed to each individual in a household appearing in a separate line.
- Under the SNAP/TANF column:
  - Y = Currently receiving SNAP/TANF benefits.
  - N = Not Currently Receiving SNAP/TANF benefits.
- Click the “Print” bottom to print the displayed results.

SNAP/TANF Case	SNAP/TANF	SSN	Previous	First Name	M.I	Suf.	DOB
	N	203783035	SSN is Inactive				
	N	206666901	SSN is Inactive				
	N	435453545	SSN was not found				
	N	435654666	SSN was not found				
02 + / + 0589764	N	190505840	AUSTIN	LICHA	Y		1968-08-15



# Working with SNAP/TANF Inquiry – Individual Search



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## SNAP/TANF Inquiry SEARCH – Individual Search

- To search by Individual Search, enter Last Name, First Name, and Date of Birth.
- Click the “SEARCH” button at the bottom of the screen.
  - **Note:** Clear the search criteria by clicking the “Clear” button.
  - **Note:** SNAP/TANF case numbers SSN, Individual Search, and EBT Number can not be searched simultaneously.
- The search results will appear at the bottom of the screen.

COMPASS  
CLICK. APPLY. BENEFIT.

Other Benefits Contact Us FAQ Help Site Map Welcome, Test

Home School Meals Information

### SNAP/TANF Inquiry

This page will allow you to search by Case Numbers, Social Security Numbers, Individual Search or EBT Number to receive the most current information. Only one category can be searched at a time. [Clear](#)

#### DHS Case Numbers

County/Case Number County/Case Number County/Case Number County/Case Number County/Case Number

OR

#### Social Security Numbers

SSN 1 SSN 2 SSN 3 SSN 4 SSN 5

OR

#### Individual Search

Last Name\* Doe First Name\* John DOB\* 01/01/2010 Gender Male

OR

#### EBT Number

EBT Number (Click image for larger display)

**SEARCH**

# Working with SNAP/TANF Inquiry – Individual Search



## SNAP/TANF Inquiry SEARCH – Individual Search

- When searching by Individual Information, multiple records may match your search criteria. For example, when searching for June your search may show Jean, Joan, and/or Jane. The “Potential Matches” screen will show these results.
- To narrow your search, select the link under “Details”
- You will be able to identify your individual by referencing their address on the “Potential Match Details” screen.

**Potential Match Results**

When Searching by individual information, multiple records match your search criteria. To narrow the search, please select the to view additional information of the individual. Please select the appropriate Radio Button (Circle) based on the information viewed.

Then click on the **Select** button to display the results of the individual.

Select	Details	Last Name	First Name	M.I	App	DOB	Sex
<input type="checkbox"/>	<a href="#">i</a>	DOE	JOHN			01/01/1971	Male
<input type="checkbox"/>	<a href="#">i</a>	DOE	JOHN			01/01/1987	Male
<input type="checkbox"/>	<a href="#">i</a>	DOE	JOHN			01/01/1980	Male
<input type="checkbox"/>	<a href="#">i</a>	DOE	JOHN			01/01/1988	Male
<input type="checkbox"/>	<a href="#">i</a>	DOE	JOHN			01/01/1985	Male

◀ PREVIOUS    PAGE 1 OF 24    NEXT ▶

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**COMPASS** [SAT]  
CLICK. APPLY. BENEFIT.

[Other Benefits](#) [Contact Us](#) [FAQ](#) [Help](#) [Site Map](#) [Welcome, Test](#)

**Potential Match Details**

Last Name	First Name	M.I	App	DOB	Sex	Address
DOE	JOHN			1971-01-01	Male	123 MAIN STREET CAMP HILL PA

CLOSE

# Working with SNAP/TANF Inquiry – Individual Search



## SNAP/TANF Inquiry SEARCH – Individual Search

- After you verify the address of the individual, you can select them from the “Potential Matches” screen.
- Click “Next” to display the results of the individual.
- The results of the individual will show at the bottom of the next screen.
- You can “Print” the results displayed on this screen.

**Potential Match Results**

When Searching by individual information, multiple records match your search criteria. To narrow the search, please select the to view additional information of the individual. Please select the appropriate Radio Button (Circle) based on the information viewed.

Then click on the *Select* button to display the results of the individual.

Select	Details	Last Name	First Name	M.I	App	DOB	Sex
<input type="radio"/>		DOE	JOHN			01/01/1971	Male
<input type="radio"/>		DOE	JOHN			01/01/1987	Male
<input type="radio"/>		DOE	JOHN			01/01/1980	Male
<input type="radio"/>		DOE	JOHN			01/01/1988	Male
<input type="radio"/>		DOE	JOHN			01/01/1985	Male

Navigation: < PREVIOUS PAGE 1 OF 2 NEXT >

**SNAP/TANF Inquiry - Results**

SNAP/TANF Case	SNAP/TANF	SSN	Previous	First Name	M.I	Suf.	DOB
	N		RecipientID is Inactive				

PRINT

# What is Income Verification Inquiry

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## Income Verification Inquiry

- Income Verification Inquiry allows users to validate that an income provided on a paper application is valid and belongs to the applicant.
- Applications can only be verified if selected as part of the verification sample. However, the Income Verification Inquiry feature can assist the sponsor with completing a paper application that may be incomplete or illegible.
- Per the USDA policy, Income Verification will allow you to verify income of a student's household if they are enrolled on CHIP or on MA. However, it will not be disclosed if the student is receiving CHIP or MA.
- Users can search by the Social Security Number (SSN) or Individual Information (Last Name, First Name, Date of Birth) of the applicant being verified.
- Up to 5 SSNs can be searched for at one time.
  - **Note:** Searches on Social Security Numbers and Individual Search can not be performed simultaneously.
- Using information available through the COMPASS Verification Inquiry must be in accordance with federal regulations for the NSLP. Unauthorized disclosure or misuse of confidential eligibility information is strictly forbidden with penalty of fine and/or imprisonment.

# How to Access Income Verification Inquiry

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## Income Verification Inquiry Access

- From the COMPASS Community Partner Dashboard (CPD) homepage, click on the "Income Verification Inquiry" button.

The screenshot displays the COMPASS website interface. The top navigation bar includes links for 'Other Benefits', 'Contact Us', 'FAQ', 'Help', 'Site Map', and 'Welcome, Test'. The main content area features a sidebar with navigation options: 'Home', 'Information', 'SNAP/TANF Inquiry', 'Income Verification Inquiry' (highlighted with a red box), 'Saved Applications', 'E-Mail Notification', and 'D'. The main content area shows a 'Messages from Headquarters' section with two messages: one dated 03/23/2016 from 't-supera' regarding NSLP Application INT Teting, and another dated 03/18/2016 from 'B-TCOMMUNITY' regarding the NSLP Dashboard. Below this, the 'Income Verification Inquiry' section is shown, with a message indicating that the results at the bottom indicate whether an individual's income meets the criteria for free or reduced lunch. A 'Clear' link is provided. The 'Social Security Numbers' section contains five input fields labeled SSN 1 through SSN 5. Below this, the 'Individual Search' section is shown, with input fields for 'Last Name\*', 'First Name\*', 'DOB\*', and 'Gender', and a 'SEARCH' button.

# Welcome to Income Verification Inquiry

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## Income Verification Inquiry Homepage

- Income Verification Inquiry allows users to validate that an income provided on a paper application is valid and belongs to the applicant.
- Searches can be performed by either Social Security Number(s) or Individual Search (Last Name, First Name, DOB).
- Five SSNs can be searched at one time.
  - Note:** SSN(s) and Individual Search can not be searched simultaneously.

The screenshot shows the COMPASS website interface for Income Verification Inquiry. At the top, there is a navigation bar with links for 'Other Benefits', 'Contact Us', 'FAQ', 'Help', and 'Site Map'. Below this, the main heading is 'Income Verification Inquiry'. A message states: 'The results displayed at the bottom of the screen indicates whether individual's income meets the criteria of free of reduced lunch.' There is a 'Clear' link next to this message. The search interface is divided into two sections: 'Social Security Numbers' and 'Individual Search'. The 'Social Security Numbers' section has five input fields labeled 'SSN 1' through 'SSN 5'. The 'Individual Search' section has input fields for 'Last Name', 'First Name', 'DOB', and 'Gender'. A green 'SEARCH' button is located at the bottom right of the form area.

# Working with Income Verification Inquiry – Social Security Numbers

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## Income Verification Inquiry SEARCH – Social Security Numbers

- To search by SSN, enter up to five SSNs in the “Social Security Numbers” table.
- Click the “SEARCH” button at the bottom of the screen.
  - Note:** Clear the search criteria by clicking the “Clear” button.
  - Note:** SSN and Individual Search can not be searched simultaneously.
- The search results will appear at the bottom of the screen.
- The results show if the individual’s income meets free or reduced eligibility criteria.
- Under “Income Verification”
  - Verified Free = Free Lunch
  - Verified Reduced = Reduced Lunch
  - Verify With Household = The Income of the Household needs to be verified with the household.
  - Foster Free = Foster Children are eligible for free lunch.

Income Verification Inquiry

The results displayed at the bottom of the screen indicates whether individual's income meets the criteria of free of reduced lunch.

Clear

**Social Security Numbers**

SSN 1	SSN 2	SSN 3	SSN 4	SSN 5
173-55-1111	455-54-3535	213-42-4554	160-60-1508	173-76-5359

OR

**Individual Search**

Last Name\*  First Name\*  DOB\*  Gender

SEARCH

SNAP/TANF Case	SSN	Last Name	First Name	M.I.	Suf.	DOB	Income verification
	173-55-1111	SHOAP	KYLEE	M		9/9/2003	Verified Free
	455-54-3535	PDE	TESTKIDA			11/11/2002	Verified Reduced
	213-42-4554	PDE	TESTKIDB			1/1/2000	Verified Free
	160-60-1508	OBRIEN	SAMANTHA	M		2/19/1979	Verify With Household
	173-78-5359	YEDNAK	DYLAN	J		4/25/1998	Verify With Household



## Information Tab

This section will cover what you need to know to access the Information tab, which provides links to information on benefits, downloadable forms and other helpful links.

# Information Tab

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## Information Tab Access

- From the Community Partner Dashboard click the “Information” tab.
  - Click on a link to open a desired page to access information on benefits, downloadable forms and other helpful links .
  - Please also note the link to the Training Guide, as well as the NSLP Eligibility Manual.

The screenshot shows the COMPASS website interface. The top navigation bar includes links for 'Other Benefits', 'Contact Us', 'FAQ', 'Help', and 'Site Map'. The 'Information' tab is highlighted in the main navigation area. Below the navigation, the 'Benefits Information' section lists various programs such as Health Care Coverage, Supplemental Nutrition Assistance Program, and Cash Assistance. The 'Downloadable Forms' section lists various forms like 'CD 878: Medical Assessment Form' and 'PA 1663: Employability Assessment Form'. The 'Other Helpful Links' section includes links like 'Cash Assistance Handbook' and 'NSLP Eligibility', with the latter highlighted by a red box.

# Glossary of Acronyms



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Term	Description of the Term
AR	Authorized Representative
AUN	Administrative Unit Number (or CNPEARS Agreement Number)
BIS	Bureau of Information Systems
BPS	Bureau of Program Support
CAO	County Assistance Office
CBT	Computer Based Training
CIS	Client Information System
CNPEARS	Child Nutrition Program Electronic Application and Reimbursement System
COE	Certificate of Eligibility (Migrant Office form)
COMPASS	Commonwealth of Pennsylvania's Access to Social Services
CP	Community Partner
CPD	Community Partner Dashboard
CSV	Comma Separated Values
DC	Direct Certification
DPW	Department of Public Welfare
EdNA	Education Names and Addresses
EXT	Extended Eligibility
LIHEAP	Low Income Energy Assistance Program
MA	Medical Assistance
MI	Migrant

# Glossary of Acronyms

COMMONWEALTH OF PENNSYLVANIA ACCESS TO SOCIAL SERVICES

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Term	Description of the Term
ML	Migrant List
OIM	Office of Income Maintenance
OR	Organization Representative
PDE-MEP	Pennsylvania Department of Education - Migrant Education Program
PDE	Pennsylvania Department of Education
PID	Pennsylvania Insurance Department
SCHIP	State Children's Health Insurance Program
SNAP	Supplemental Nutrition Assistance Program
SNP	School Nutrition Program
SSN	Social Security Number
SNP	School Nutrition Program
TANF	Temporary Assistance for Needy Families (Cash Assistance)
USDA	United States Department of Agriculture



[www.education.pa.gov/dfn](http://www.education.pa.gov/dfn)