TX-UNPS New Administrative Review User Guide

Getting Started

Before you can begin using TX-UNPS, you must be assigned a user ID and password that provides the required security rights. Once this setup is complete, you may use the Internet and your assigned user ID and password to access and log onto the TX-UNPS web site.

Accessing the Web Site

You can access TX-UNPS website from any computer connected to the Internet by opening your Internet browser and entering the URL in the browser’s address line. The TX-UNPS URL is:


TIP: You can add this URL to your browser’s Favorites list or create a shortcut to the web site on your desktop for quicker access to the site. Refer to your browser or operating system help files for further information.

Logging On

To log on

Access TX-UNPS by typing the URL into the address line of your web browser.

Enter your assigned User ID.

Enter your Password.

Select Log On.

Note: If you do not have a User ID and Password, contact the Texas Department of Agriculture at (877) TEX-MEAL.

TIP: The Password is case-sensitive, so be sure to use upper- and lower-case letters, if necessary.

Off-site Review Forms

Before you can access the Off-site review forms, your Contracting Entity must have an approved 2015-2016 Annual Application on file in TX-UNPS.
To access the Review Forms

1. Select the Compliance Menu.

2. Select Review Tracking from the Compliance menu.

Select the Details link for the desired review. The Review Dashboard displays.

Select Detail next to the Review Forms option.
The Off-site Review Forms screen displays.

Note: The system groups the forms by type. You can expand or collapse the forms by form group by selecting the + or - icons for easier viewing.

Figure 1: Review Forms screen (partial)
**SFA Forms**

The Off-site SFA Forms are group of forms provided by the USDA to be completed prior to the On-site form groups.

**To complete the SFA Off-site Assessment forms**

1. Select **Modify** for the desired Off-site Assessment form.

   ![Modify](Modify.png)

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<tr>
<th>Off-site Assessment (12)</th>
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<td>SFA Forms (11)</td>
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2. Complete all review questions.

   - If additional information from the USDA Guidance is available, select 🤔 to view the tool tip.

   - You will see 📂 icon to the right of most questions in the Off-site Assessments to upload attachments. **PLEASE DO NOT UPLOAD ATTACHMENTS HERE.**

**Note:** Documents requested by TDA for the Offsite review will be uploaded in the Review Attachments section of the Review Dashboard. Please reference page 7 of this document to locate the Review Attachments section.
Figure 2: Off-site Assessment Form – 200 – Verification (partial)

- Select **Validate** to save the form and check for errors.

- If the form contains errors (e.g., a required question was not answered), an error message displays and the form was saved with an Error status.

![Validation Confirmation](image)

**Validation Confirmation**

The form contains errors.

< Edit  Finish

Figure 3: Validation Confirmation – Errors screen

- Select **<Edit** to return to the form. Questions with errors display with a red indicator ( ) beside the question number.
Correct any errors and select Validate. Once the form has been saved without errors, the status changes to “Pending Review.”

Sites

The Sites section of the Off-site Assessment consists of the Meal Compliance Risk Assessment Tool. CEs will only complete the Meal Compliance Risk Assessment Tool, by site, if more than one site is being reviewed. If only one site is selected for review, this screen will not display the Meal Compliance Risk Assessment Tool.

To use the Meal Compliance Risk Assessment Tool by site

1. Select Modify for the desired Site.

2. Select Modify for the Meal Compliance Risk Assessment Tool.

3. Complete questions. For each question answered, risk points display in yellow.
4. Select Validate. The total Risk Score displays at the top and bottom of the screen.
Per the USDA Guidance Manual, the Meal Compliance Risk Assessment Tool must be completed for each selected school. The Meal Compliance Risk Assessment evaluates error-prone areas and provides risk scores. The selected site with the highest Meal Compliance Risk Assessment score must undergo a more in-depth meal review (i.e., “Targeted Menu Review”).

**Form Statuses:**
A status column is located to the right of each SFA level form and Site level Form. They may display the following statuses:

- Incomplete – the form has been started, but has not been completed.
- Completed – all questions have been answered in the form without errors.
- Error – required questions in the form have not been answered correctly.
- Not Applicable – the form set does not apply to the CE and does not need to be completed.

**Accessing Review Attachments:**
TDA reviewers will request CEs to provide specific documentation during the Off-site Assessment and CE’s will attach the requested documents in this section of TX-UNPS.

1. CE must return to the SNP Reviews Review Dashboard. If you were currently working in the Off-site Assessment forms, click the “Back” button at the bottom of the screens until you reach this page.
2. Click “Details” next to Review Attachments.

3. Click “Add Attachment.”
4. Click “Browse” to open a search window for your computer.

5. Once the browser window appears, search for the document on your computer you want to attach. Once you find your document, double click it to attach and upload into TX-UNPS. You will see the file name appear in the File To Attach cell. Please add a brief description of the file attached in the Description cell. Once you have completed attaching your document, click “Save.”

- **Note:** Please use the following naming convention for files attached:
  - Offsite Form Series_Document Name (example 100_Student Roster), or
  - Offsite Form Series_Document Name_Site (example 300_Meal Counts_ABC JRH)

Please reference the Administrative Review Offsite Checklist for Form Series and Document Names.

6. If you accidentally attach the wrong file, click the “Browse” button again. Search for the desired file and attach it by double clicking on it. The new attachment will over-write the previous document you attached. Once you have completed the attachment and clicked save, click “Finish” to complete the action of attaching a document. Click “Edit” if you must go back to the previous attachment to make a change.
Once you have finished attaching a document, you will return to your Attachment List screen. You will see the document you have attached with the ability to View or Modify the attachment. You may also attach another document by clicking the “Add Attachment” button again.

Once all applicable forms in the Off-site Administrative Review have a “Completed” status and all requested documents have been attached, you have finished the Off-site portion of the review. The Off-site monitor will contact you for any questions, corrections, or errors that may be addressed prior to the On-site review.