

**Ohio Department of Education**  
**Office of Integrated Student Supports**  
**Commodity Allocation Tracking System (CATS) Finalize Orders Function**  
 July 28, 2020

The **Finalize Orders Function** requires sponsors to order all allocated food based on **Survey 1028, 2020-2021 Demand Order: USDA Foods**. Orders cannot be finalized until all allocated cases have been ordered. This function ensures that sponsors receive all allocated food as requested on the survey and remain compliant with USDA regulations regarding excess inventory. Instructions for submitting and finalizing orders are listed below.

Sponsors must inform the USDA Foods staff before the 15<sup>th</sup> day of each month if they are unable to accept all allocated units. Sponsors must provide documentation indicating why allocated units cannot be received. If allocated units are cancelled, the value of the cancelled units will not be credited to the sponsor's Planned Assistance Level (PAL). Once the order form(s) are finalized, changes may not be made.

Any cases refused upon delivery will be removed from the sponsor's allocations and returned to the warehouse inventory. Unallocated cases will be offered as bonus items on the next monthly order form. The value of the returned cases will not be credited to the sponsor's Planned Assistance Level (PAL).

Please log into the CATS and follow these steps to access and submit the order form:

- Click **Agencies**
- Click **Orders**
- Click **Open Orders**; then **continue**
- Click **New Order** if no data available
- Click **Delivery Location** in drop down menu and select a delivery location; then **continue**

The order form will open.

If there are multiple delivery locations, each location will need to be selected in the **Delivery Location** drop down box. When each order form opens, click **Save**.

Return to the **Open Orders** screen and all delivery locations should be listed. If a delivery location does not appear, click **New Order** and add the delivery location. Click **Modify** next to each delivery location to open the order form and enter the order.

Under the **Entitlement Commodities** section of the order form, each commodity listed includes the number of allocated units for the entire district. Please enter the case amount for each delivery location and date in the order quantity box. Sponsors determine how to divide the allocated cases between their delivery locations.

Order							
Entitlement Commodities							
Commodity	District Allocated	Order Quantity	Surplus Inventory	Surplus Order Quantity	60 Day Advanced Order	Total Order Quantity	Delivery Date
100206 - APPLE SLICES CAN-6/10 Pack Size: 6/#10 CAN / Cases / Facts USDA Entitlement Value: \$33.52  Processing Charge: \$0.00 S&H Charge: Total Charge per Unit: \$0.00	10	<input type="text" value="0"/>	0	<input type="text" value="0"/>	0	0	01/15/2019
<b>Demand Order Survey Units</b>							
	Allocated:	10					
	Remaining to Order:	10					

For each commodity listed, the sponsor can see how many units remain to be ordered for the current monthly order form. Sponsors are required to order all food allocated based on survey allocations. Once the order is complete for the delivery location, click **Save**. A new window will open and display the following message: The combined order was saved successfully. Click **Finish**.

Sponsors return to the **Open Orders** screen, which lists the current month's orders. Repeat this ordering process for each delivery location. After all orders have been placed, follow these steps to finalize the order form:

- Click **Go to Finalize Orders**

- Select the order(s) to finalize

- Click **Finalize Open Orders**
  - If all allocated units have been ordered on the current monthly order form, the CATS will indicate that, “the selected orders have been successfully finalized.” Click **Finished**.
  - If all allocated units have not been ordered on the current monthly order form, the CATS will display these unordered units. Before finalizing all open orders, the number of units required for the commodity food listed must be ordered. Return

to the monthly order form to add these unordered units, then repeat the finalize orders process.

The screenshot shows the 'Commodity Allocation Tracking System' interface. At the top, there is a navigation bar with 'Operations', 'Agencies', 'Reports', and 'Security'. On the right, it says 'Ohio Department of Education' with 'Programs', 'Year', 'Help', and 'Log Out' links. Below this is a breadcrumb trail: 'Agencies > Orders > Open Orders >'. The main heading is 'Finalize Open Orders'. There is a checkbox labeled 'Check / Uncheck all'. Below that is a table with columns: 'Select', 'Delivery Month', 'Order #', 'Delivery Location', 'Warehouse', and 'Delivery Date'. One row is visible with a checked checkbox, 'January', '73696', an empty location, 'Sysco Cleveland - New 7-2018', and '01/15/2019'. Below the table is a red note: '• 100% of all District Allocated units must be ordered before your orders can be finalized. Please update your order(s) as needed.' Below the note is another table with columns: 'Delivery Month', 'Commodity', and 'Units Required'. One row is visible with 'January', '110721 - SWEET POTATOES CRINKLE FRZ PKG-6/5', and '10'. At the bottom, there are two buttons: 'Finalize Open Orders' and '< Back'.

Note: If the remaining units to order are not added to the order form, the USDA Foods staff will add remaining units to open orders at its discretion. As a result, sponsors may receive too many or too few units at delivery locations.

Please contact the USDA Foods staff if you have any questions.

Christine Farmer  
USDA Foods Program Specialist  
[Christine.Farmer@education.ohio.gov](mailto:Christine.Farmer@education.ohio.gov)

Justin Chapman  
Management Analyst  
[Justin.Chapman@education.ohio.gov](mailto:Justin.Chapman@education.ohio.gov)

Contact the Office of Integrated Student Supports with any questions at 614-466-2945.

Office of Integrated Student Supports  
Ohio Department of Education  
614-466-2945  
1-800-808-6325  
[child.nutrition@education.ohio.gov](mailto:child.nutrition@education.ohio.gov)