

# *Step by Step Instruction:* How to Create a Surplus Catalog Requisition

Professional Standards Learning Code 1170  
Length: 15 minutes



**Released July 2019**

"How to Create a Surplus Catalog Requisition" is intended for the School Food Authorities in the state of Arizona. All regulations are specific to operating the USDA Foods Program under the direction of the Arizona Department of Education.

*Step by Step  
Instruction:  
How to Create  
a Surplus  
Catalog  
Requisition*

## **Intended Audience and Content**

- This *How-To-Guide* is intended for Recipient Agencies (RAs) operating the USDA Foods in Schools Program who would like to request USDA Foods from excess inventory for use through out the school year.
- The following slides provide guidance on how to create a Surplus Catalog Requisition.

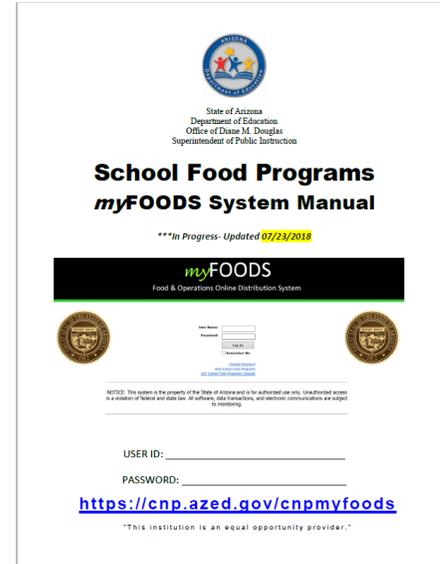
*Step by Step  
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## **Objectives**

At the end of this training, attendees should be able to:

- understand how to read the Surplus Catalog;
- create and place a requisition; and
- review the shipment.

# Step by Step Instruction: How to Create a Surplus Catalog Requisition



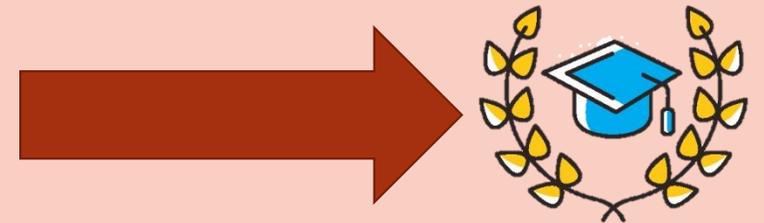
The instruction within this How-To-Guide is based on the [myFOODs system manual](https://cnp.azed.gov/cnpmyfoods).

- Section: Product Catalogs (pages 6, 8-9)

*It is recommended to review the myFOODs system manual in addition to completing this How-To-Guide for complete understanding of requesting materials throughout the year.*

# *Comprehension Check*

- Throughout this guide there will be comprehension quiz questions to test your knowledge and help you apply what you're learning.
- Be sure to review these quiz questions and the answers, available within the guide.
- This icon will indicate a comprehension quiz question, and the background of the slides will be a lighter color like you see on this slide.



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a Surplus  
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## **Definitions**

**Surplus Catalog:** A list of available materials (USDA Foods) in which an RA can request cases. The surplus catalog allows the USDA Foods Program to properly manage physical inventory levels.

**Surplus Catalog Requisition:** An RA request submitted through myFOODS to request a case(s) of USDA Foods.

**Surplus:** Excess inventory that was ordered to assist with purchasing full truck loads or an RA declined materials from the Available Materials list in myFOODS.

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*The Step by Step Instruction will review:*

|                       |              |
|-----------------------|--------------|
| Surplus Catalog       | Slides 7-10  |
| Selecting Materials   | Slides 11-16 |
| Placing a Requisition | Slides 17-20 |
| Questions and Answers | Slides 21-22 |

*The following slides will only cover how-to instructions for Placing a Surplus Catalog Requisition. Please refer back to the [ADE Online Training Library](#) for other myFOODs system processes.*

# Surplus Catalog

## *Surplus Catalog*

### **Surplus Catalog**

- An RA requests materials from the catalog to be received and used on their next available delivery date
- Catalog is available everyday that there is excess inventory from 6:30 am – 2:00 pm
- Requisitions are processed on the same day
- When requisitions are processed, the materials are scheduled for shipment on your next available delivery date – changes to quantities and delivery dates are NOT ALLOWED
- View My Shipments, scheduled, to see the materials from your request

# Surplus Catalog

Training Agency 01  
Status = Active  
Welcome Training User 01

Home View Entitlement **Product Catalog** My Agency My Re

USDA FOODS  
HEALTHY CHOICES  
AMERICAN GROWN

Product Catalogs:  
[Surplus](#)

Welcome Training User 01 (Training Agency 01) to the myFOODS Portal!

myFOODS Bulletin Board Messages

- ▼ : USDA Recalls / Holds
  - There are no USDA Recalls / Holds at this time.
- ▼ : Messages
  - There are no messages at this time.
- ▼ : What's New
  - **AFR Help – Commodities**  
If you are working on your Annual Financial Report the "Agency Completed Shipment Report" will help  
In order to determine freight charges, you need to multiply the number of cases received by the shippi  
Prep Site: \$3.12 per case

1. Click Product Catalog (red arrow).
2. If a catalog is available, the link will be on the left side of the screen (black arrow).
3. Click Surplus.

# Surplus Catalog

Home View Entitlement Product Catalog My Agency



## Product Catalog: Surplus

To begin the process of requesting materials, select a product catalog from the list of materials.

**Surplus Deadlines for Requesting Materials:**

▶ : 06/30/2019 is the deadline for requesting the following "Surplus" catalog items.

**Product Catalogs:**

- [Surplus](#)

**Categories:**

- [Beans](#)
- [Dairy](#)
- [Fish](#)
- [Flour/Grain](#)
- [Fruits](#)
- [Grains](#)
- [Juice](#)
- [Meat](#)



4. A number of Categories display, you may click each category to view all the materials available in that category.
5. OR, you may click the blue band to expand and display all of the materials available in list form (not by category).

**Surplus Deadlines for Requesting Materials:**

▶ : 06/30/2019 is the deadline for requesting the following "Surplus" catalog items.

|   |
|---|
| APPLE SLICES FRZ CTN-12/2.5 LB (110470)       |
| APPLESAUCE CUP-96/4.5 (110361)                |
| APPLESAUCE UNSWEETENED CAN-6/10 (110541)      |
| APRICOT FRZ CUP-96/4.5 OZ (100261)            |
| APRICOTS DICED PEELED EX LT CAN-6/10 (100216) |
| BEANS BLACK TURTLE CAN-6/10 (100359)          |
| BEANS GARBANZO CAN-6/10 (100360)              |
| BEANS GREEN CAN-6/10 (100307)                 |
| BEANS GREEN FRZ CTN-30 LB (100351)            |

## *Comprehension Check*

**True or False: The Surplus Catalog is a way for you to request USDA Foods even though you are currently out of entitlement.**



## *Comprehension Check*

**True. The USDA Foods Program has to pay excess storage fees to the warehouse when physical inventory sits. The Surplus Catalog allows the USDA Foods Program the ability to move inventory and assist RAs by providing USDA Foods in the form of “bonus” entitlement.**



# Selecting Materials

## *Selecting Materials*

### **Selecting Materials**

- An RA should only request materials that they can receive the following week (next available delivery date – for schools in northern Arizona the delivery frequency may be bi-weekly)
- An RA should only request materials they can use in a timely manner
- An RA will use entitlement for requested materials unless no remaining entitlement is available – the requested materials are then “bonus”
- An RA should request enough materials to meet minimum case requirements if no other materials will be scheduled

# Selecting Materials

1. Click on the Category of the material you are requesting.
2. Select the material you want and click Add To Cart.

**USDA FOODS**  
HEALTHY CHOICES  
AMERICAN GROWN

**Product Category: Fish**

**Selected Items**

Status: Shopping in Progress  
Catalog: Surplus  
Delivery Location:

| Indicator | Select                   | USDA Fact Sheet               | Material # | Material Description                |
|-----------|--------------------------|-------------------------------|------------|-------------------------------------|
|           | <input type="checkbox"/> | Fact Sheet Not Available      | 110851     | Fish AK Pollock Sticks Brd Frz 40LB |
|           | <input type="checkbox"/> | <a href="#">Click to View</a> | 100195     | TUNA CHUNK LIGHT CAN-6/66.5 OZ      |

Add To Cart    Checkout

3. Once a material has been added to the cart, you may click on other categories and add additional materials to the cart. Only ONE Surplus Catalog requisition can be submitted per day.

# Selecting Materials

4. Click Checkout.
5. Note the materials listed. If a material appears in the Checkout screen that you do not want, click Delete next to that material. If you forgot to add a material at this point, you can click back on a category and select another material to add to the cart, then Click Checkout again.

## Checkout Surplus

Entitlement Year: 2018-2019, Net. Entitlement: \$31,999.68, Prior Reqs: \$2,487.10, **Cart Value: \$0.00**, Remaining Bal: \$18,750.98 (values are estimated)

| Selected Items     |   |
|--------------------|---|
| Status:            | Shopping in Progress  |
| Catalog:           | Surplus   |
| Delivery Location: | Shipping Address #1, 123 Any Street, Phoenix AZ 11111 (Delivery Date = 6/28/2019) |

Use this screen to specify desired quantities and delivery dates. Click the "Update Cart Value" button to see the current shopping cart value. Click the "Continue" button to continue the Checkout process. Click the "Delete" link beside any item to remove that item from your cart.

Note that "USDA Shipping Period(s)" indicate the first or second half of a month and not a specific date (e.g. 10/1 indicates USDA will deliver to US Foods sometime between 10/1 and 10/14).

| Action                 | Material Description                                  | Estimated Value per Quantity | Remaining Surplus Quantity | Surplus   |
|------------------------|---|------------------------------|----------------------------|---|
| <a href="#">Delete</a> | 110851 - Fish AK Pollock Sticks Brd Frz 40LB (1/40lb) | \$87.36                      | 996                        | Cases Requested<br><input type="text" value="0"/> |

## Selecting Materials

### Checkout Surplus

Entitlement Year: 2018-2019, Net. Entitlement: \$31,999.68, Prior Reqs: \$2,487.10, **Cart Value: \$0.00**, Remaining Bal: \$18,750.98 (values are estimated)

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Use this screen to specify desired quantities and delivery dates. Click the "Update Cart Value" button to update the current shopping cart value. Click the "Continue" button to continue the Checkout process. Click the "Delete" link beside any item to remove that item from your cart.

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| Action                 | Material Description                                  | Estimated Value per Quantity | Remaining Surplus Quantity | Surplus   |
|------------------------|---|------------------------------|----------------------------|---|
| <a href="#">Delete</a> | 110851 - Fish AK Pollock Sticks Brd Frz 40LB (1/40lb) | \$87.36                      | 996                        | Cases Requested<br><input type="text" value="5"/> |

- Based on the Remaining Surplus Quantity, enter a case quantity you can use in a timely manner (within 1 month). Do not request more than you can use or store.
- If you do not have materials currently in the Available Materials list, make sure you are requesting enough cases to meet your minimum case requirement.
- Click Update Cart Value. Remember, if you have remaining entitlement you will be charged this amount, if you do not have remaining entitlement, this value is bonus.
- You can place a Surplus Catalog requisition even if you are out of remaining entitlement.

# Selecting Materials

## Review Requisition

Entitlement Year: 2018-2019, Net. Entitlement: \$31,999.68, Prior Reqs: \$2,487.10, **Cart Value: \$436.80**, Remaining Bal: \$18,314.11 (Values are estimated)

| Selected Items     |   |
|--------------------|---|
| Status:            | Shopping in Progress  |
| Catalog:           | Surplus   |
| Delivery Location: | Shipping Address #1, 123 Any Street, Phoenix AZ 11111 (Delivery Date = 6/28/2019) |

Buttons: To make modifications to this requisition, click the **Modify Requisition** button. To submit this requisition, click the **Place Requisition** button. To cancel this requisition, click the **Cancel Requisition** button.

Note that "**USDA Shipping Period(s)**" indicate the first or second half of a month (e.g. 10/1 indicates USDA will deliver to US Foods sometime between 10/1 and 10/15).

| Material Description                                  | Estimated Value per Quantity | Remaining Surplus Quantity | Surplus              |
|---|------------------------------|----------------------------|----------------------|
| 110851 - Fish AK Pollock Sticks Brd Frz 40LB (1/40lb) | \$87.36                      | 996                        | Cases Requested<br>5 |

[Modify Requisition](#) [Place Requisition](#) [Empty Cart](#)

10. Look at the Selected Items section.
11. Does the Delivery Date listed meet your needs? Once the requisition is processed and the requested materials are scheduled for shipment, you CANNOT make changes to the quantities or delivery date.
12. Will someone be onsite that day? Please consider your holiday breaks and school closures when placing Surplus requisitions as you will be charged a re-stocking fee for all cases if someone is not there to receive the shipment.

## *Comprehension Check*

**True or False: Since I do not have any remaining entitlement I should request as many cases off the Surplus Catalog as I possibly can.**



## *Comprehension Check*

**False. An RA should only request a quantity in which they can successfully use within a month. The USDA Foods Program monitors requests and has the discretion to reduce quantities when deemed more than can be used in a month.**



# Placing a Requisition

## *Placing a Requisition*

### **Placing a Requisition**

- An RA should NOT leave Surplus materials in the cart as the Remaining Surplus Quantity may no longer be available when the requisition is finally placed
- Once a Surplus Catalog requisition is placed, the USDA Foods program will complete the request and schedule the materials for shipment on your next available delivery day – as displayed in the Selected Items section
- You may NOT edit a requisition or scheduled Surplus shipment once it has been placed
- You may only place one Surplus Catalog requisition a day

## Review Requisition

Entitlement Year: 2018-2019, Net. Entitlement: \$31,999.68, Prior Reqs: \$2,487.10, **Cart Value: \$436.80**, Remaining Bal: \$18,314.18 (values are estimated)

| Selected Items     |   |
|--------------------|---|
| Status:            | Shopping in Progress  |
| Catalog:           | Surplus   |
| Delivery Location: | Shipping Address #1, 123 Any Street, Phoenix AZ 11111 (Delivery Date = 6/28/2019) |

Buttons: To make modifications to this requisition, click the **Modify Requisition** button. To cancel this requisition, click the **Cancel Requisition** button. To submit this requisition, click the **Place Requisition** button.

Note that "**USDA Shipping Period(s)**" indicate the first or second half of a month (e.g. 10/1 indicates USDA will deliver to US Foods sometime between 10/1 and 10/15).

| Material Description                                  | Estimated Value per Quantity | Remaining Surplus Quantity | Surplus              |
|---|------------------------------|----------------------------|----------------------|
| 110851 - Fish AK Pollock Sticks Brd Frz 40LB (1/40lb) | \$87.36                      | 996                        | Cases Requested<br>5 |

1. Click Place Requisition.
2. An email was sent to the user whom is logged in and placed the requisition.

THANK YOU! Requisition has been placed. Requisition # = req50 [Click here to view](#)

# Placing a Requisition

# Placing a Requisition

|                          | Action               | Action               | Ship # | Status    | Scheduled Delivery | Total Cases | Shipping Address  | Program | Created By       | Created On           |
|--------------------------|----------------------|----------------------|--------|-----------|--------------------|-------------|---|---------|------------------|----------------------|
| <input type="checkbox"/> | <a href="#">View</a> | <a href="#">Edit</a> | 5201   | Initiated | 4/4/2019           | 20          | Shipping Address #1<br>123 Any Street<br>Phoenix AZ 11111 | NSL     | Super User 1     | 4/4/2019 8:03:11 AM  |
| <input type="checkbox"/> | <a href="#">View</a> | <a href="#">Edit</a> | 5303   | Initiated | 4/12/2019          | 40          | Shipping Address #1<br>123 Any Street<br>Phoenix AZ 11111 | NSL     | Training User 01 | 4/4/2019 10:52:44 AM |
| <input type="checkbox"/> | <a href="#">View</a> | <a href="#">Edit</a> | 5310   | Initiated | 5/17/2019          | 20          | Shipping Address #1<br>123 Any Street<br>Phoenix AZ 11111 | NSL     | Training User 01 | 5/8/2019 10:57:35 AM |
| <input type="checkbox"/> | <a href="#">View</a> | <a href="#">Edit</a> | 5336   | Initiated | 5/24/2019          | 25          | Shipping Address #1<br>123 Any Street<br>Phoenix AZ 11111 | NSL     | Training User 01 | 5/15/2019 1:03:19 PM |
| <input type="checkbox"/> | <a href="#">View</a> | <a href="#">Edit</a> | 5337   | Initiated | 5/31/2019          | 15          | Shipping Address #1<br>123 Any Street<br>Phoenix AZ 11111 | NSL     | Training User 01 | 5/15/2019 1:03:19 PM |
| <input type="checkbox"/> | <a href="#">View</a> | <a href="#">Edit</a> | 5354   | Initiated | 6/28/2019          | 5           | Shipping Address #1<br>123 Any Street<br>Phoenix AZ 11111 | NSL     | Super User 1     | 6/20/2019 2:35:23 PM |

3. The USDA Foods program will process your requisition and create a shipment.
4. Click My Shipments, Shipment List tab, Scheduled shipments.
5. Ship # 5354 is the Surplus Catalog requisition that was placed.
6. If a shipment is created for your Surplus Catalog requisition, it will combine with other shipments listed for the same delivery date and site.

# Questions and Answers

## Questions and Answers

*Can I change the date of my scheduled shipment that was created when my Surplus Catalog requisition was processed?*

- No, the Surplus Catalog allows the USDA Foods Program to move inventory from the warehouse to RAs to avoid being charged excess storage fees. If shipment dates are changed to a later date, the USDA Foods Program is in jeopardy of receiving an excess storage fee invoice from the warehouse.

*Can I Create Surplus Catalog Requisitions even if I do not have any remaining entitlement?*

- Yes, the Surplus Catalog allows the USDA Foods Program to move inventory from the warehouse to RAs to avoid being charged excess storage fees. If you do have remaining entitlement, you will pay for the cases you request.

# Technical Assistance

If you have any questions about Surplus Catalog Requisitions, use:

- The myFOODS System Manual at:  
<http://www.azed.gov/hns/sfp/usda-foods/>  
Under the **Guidance and Training** tab

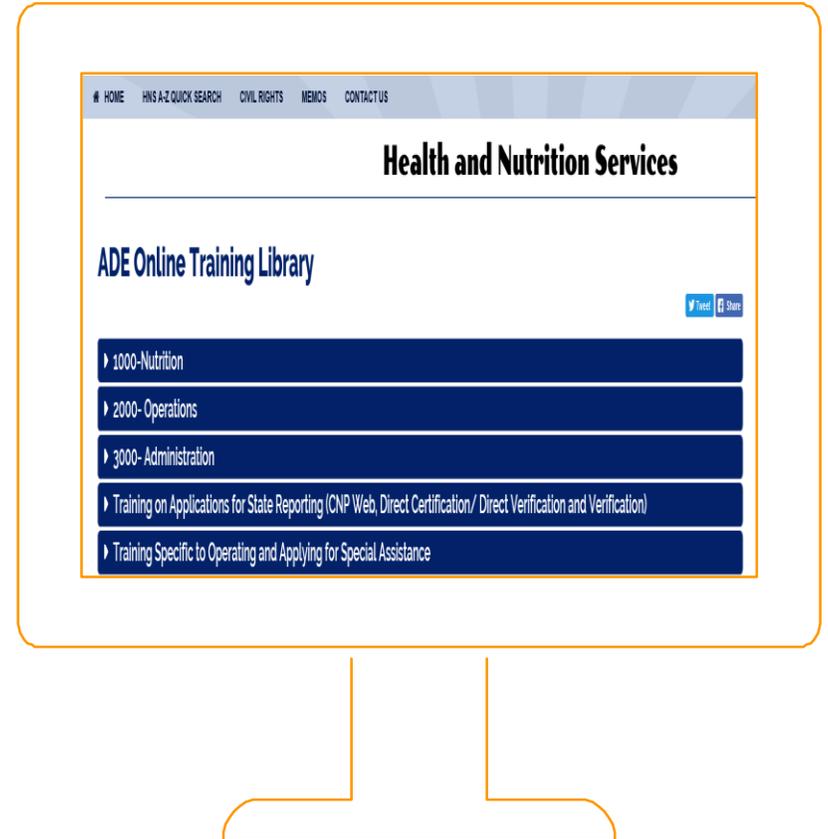
*For other questions about Surplus Catalog Requisitions, please contact your USDA Foods Program.*

## *End of Training*

### **ADE Online Training Library**

Online trainings are easy to use and available year round. Directors and staff are encouraged to complete these trainings as a way to review previously learned subjects, or as an introduction to a regulation.

Please take some time to browse through the [ADE Online Training Library](#) to review additional resources.



## *End of Training*

# Congratulations!

You have completed the ***Step by Step Instruction: How to Create a Surplus Catalog Requisition.***

In order to count this training towards your Professional Standards training hours, the training content must align with your job duties.

- Information to include when documenting this training for Professional Standards:
  - Training Title: ***Step by Step Instruction: How to Create a Catalog Requisition***
  - Learning Code: 1170
  - Key Area: 1000- Nutrition
  - Length: 15 minutes
- *Please note, attendees must document the amount of training hours indicated on the training despite the amount of time it takes to complete it.*

**Request a  
Certificate**

*End of Training*

# Requesting a Training Certificate

Please click on the link below to complete a brief survey about this training. Once the survey is complete, ADE will create a certificate of completion and email it to you within 10 business days.

<https://www.surveymonkey.com/r/OnlineHowToGuides>

**The information below is for your reference when completing the survey.**

Training Title: ***Step by Step Instruction: How to Create a Surplus Catalog Requisition***

Professional Standards Learning Code: ***1170***

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*To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [http://www.ascr.usda.gov/complaint\\_filing\\_cust.html](http://www.ascr.usda.gov/complaint_filing_cust.html), and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) email: [program.intake@usda.gov](mailto:program.intake@usda.gov).*

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