

Summer EBT Form 2025 Guidance

As with all guidance, please read in its entirety prior to beginning the annual school year data collection.

Purpose

This dedicated data collection is required for each religious and independent approved National School Lunch Program (NSLP) school (also known as a Recipient Agency or RA) to submit a student/child roster with student/child enrollment, demographic, and parent contact information, of students/children enrolled at any time *during the current school year* for the Office of Temporary Disability Assistance (OTDA) to issue Summer electronic benefits (SEBT). The New York State Education Department (NYSED or the Department) is partnering with the OTDA to facilitate the data collection process for all public school district, charter, religious, and independent schools. Please visit [OTDA.ny.gov/SummerEBT](https://otda.ny.gov/SummerEBT) for further information.

Access

All NSLP approved religious and independent CEOs found on file in SEDREF for their BEDS Code location and in the Child Nutrition Management System (CNMS) as approved NSLP RAs now have account access to the “Summer EBT Form 2025” data collection in the IDEX application via the [NYSED Application Business Portal](#). Please see our [IDEx webpage](#) and [IDEx Help Center](#) for more information about IDEX.

Individual CEO NYSED Portal account access is based on the BEDS code location. Therefore, ***if a person is the CEO of more than one BEDS code in SEDREF, they will have an account for each BEDS code.*** The Summer EBT collection in IDEX will display the matching BEDS code form/file for the logged in account. ***The CEO must complete the Summer EBT Form 2025 for each individual school location.*** As per NYSED policy, ***CEOs are responsible for their own location’s data and the access to that data.*** A CEO may delegate access to a designee using the SED Delegated Account System (SEDDAS) to create staff accounts and entitle access to the Summer EBT Form 2025 in the SEDDAS application. The SEDDAS user guide, available on the lefthand menu in the SEDDAS application on the NYSED Application Business Portal. The guide provides guidance to create accounts and entitle application access. ***Select*** the “submit/certify” default role for the person you chose to delegate access.

Best practices **IMPORTANT** Lessons learned

- ***DO NOT modify the structure of the form*** otherwise your form will not upload successfully to the IDEX application.
- ***Download and use a new from each year of the collection*** and enter data into the form for the specific school year. Please see step by step directions, below.
- ***If you copy and paste*** information from another system ***ensure data are input the correct exact format.***
 - Follow the ***file format indicated in the instructions*** to avoid the file bulk upload validations failing (erroring out).
 - ***A number must display as a number (not in scientific notation format).*** If it does not display as a number ***you must format the column*** as a number (with no decimal points).
 - ***A date must display*** a all-numeric (digit) format. Please follow the instructions, exactly as indicated below.
- ***If your file fails*** or errors out, ***download and use the detailed error report generated in IDEX to correct the errors*** (highlighted) and upload the form again.
- ***Always save your work often to your local computersystem (or network).*** Upload your final saved form to the IDEX application. This will allow you to update data as students/children are registered and enrolled at your school during a school year and allow for an easier submission

process each subsequent year.

- **For students/children currently enrolled in school locations who needed to create a local ID (guidance on Datasupport) and had to create a local ID for the student/child in a prior school year, you must use the same local ID you previously assigned to the student/child.**
- In Excel, **if you see a red triangle in the top right corner of a cell** it denotes an error.
 - “Hover” your cursor over the triangle to see additional information **you must take to provide a correct response.**
- **DO NOT “submit” until the form is complete with all student/child and parent information included.** Once “submitted,” you will not be able to upload any further changes. **Students/children without complete information not included in the final submitted form will be ineligible to receive benefits.**
- **Changes can be uploaded in IDEX as many times as needed, until you click “submit.”** Uploaded files are maintained in their format, in the IDEX application, until you click “submit.”
 - When **changes** are made, **the user must upload the entire updated completed form**(file), otherwise the file will overwrite your previous file.
 - When **you click “submit” no other changes will be accepted.**
 - **You are not “done” until you “SUBMIT” your form and receive a “submission successful” notification (message) on your screen.**
 - **If you don’t see a “submission successful” notification (message), scroll down.**
- **When your form is completed, with no further new student/child enrollments anticipated,** “submit” the form in IDEX.
- A completed form **must be submitted with a “successful submission” notification (message) status displayed** in the IDEX application **on or before the final submission deadline.** Otherwise, students/children will not be able to receive benefits.
- If you “submit” the form, in error, you may request a form reset via [Datasupport](#) and include your full name, 12 digit BEDS Code, work email address, work phone number, and your request to reset the “Summer EBT” form.

User Directions

Steps 1 – 7 are to access the application and the Microsoft Excel Summer EBT Form 2025.

Steps 8-31 identify the columns within the MS Excel Summer EBT Form 2025 with the information to be entered, for each student/child per row (1 row = 1 student/child).

Steps 32 – 41 walk the user through the final upload, submission, closing, and log out process.

Step	Directions	Notes/Why quality data are needed/Used
1	Go to https://portal.nysed.gov/abp	
2	Click “Login” in the top dark blue banner	
3	Enter username and password	Refreshed landing page will list your entitled data applications.
4	Click “IRS Data Exchange”	This will open a new tab for the IRS Data Exchange application displaying your current forms. You may need to search (search field) for the form: Summer EBT Form 2025 if it is not on page 1.
5	Click on “Summer EBT Form 2025” link in the IDEX browser tab that	This IS the current school year collection template (Form).

	opened in step 4.	
6	Click on “Download Template.”	
7	Go to your personal computer (PC) downloads folder for the Microsoft Excel file name “Summer_Electronics_Benefit_Transfer_<School year>.xlsx”	Open the Microsoft Excel file and enter the data as indicated (Steps 8 – 30).
8	Column A BEDS Code required field	12-digit number school BEDS code. This is the physical location where the student/child is being fed. If you do not know your BEDS Code, please use SEDREF . NOTE: this is how IDEX understands that your bulk upload gets assigned to your institution.
9	Column B Individual Student Local ID required field	9-digit maximum . OTDA uses this number for matching and deduplicating errors in student/child records. If you do not have local student IDs and created IDs using our guidance on Datasupport , you MUST use the same local ID for the student/child. Never reuse local ID numbers.
10	Column C BEDS Code required field	12-digit number school BEDS code. This is the same number entered in Column A.
11	Column D Legal Name required field	50-character maximum Legal name (not popular name). If unknown search your information on file with the Department on SEDREF .
12	Column E NYSSIS ID	10-digit number . OTDA uses it to match and deduplicate errors in student/child records.
13	Column F Student First Name required field	35-character maximum Used to match student/child. No name, no benefits issued.
14	Column G Student Middle Initial	1-alpha character maximum NO Punctuation . Used to match students/children with same First/Last name.
15	Column H Student Last Name required field	35-character maximum Used to match student/child. No name, no benefits issued.
16	Column I Student Date of Birth (DOB) required field	8-digit number represented as YYYYMMDD . For example 20190719. OTDA uses DOB as a security feature to access benefits. <i>If the DOB is incorrectly submitted the recipient will not be able to access benefits and will be instructed to contact the school to have the DOB corrected in school files and data systems.</i>
17	Column J Student Street Address, their physical home mailing address required field	35-digit and character maximum This is the mailing address the SEBT card will be mailed to. <i>Benefits cards CANNOT be forwarded by US Postal Service if an address is incorrect or outdated.</i> If a parent/guardian calls the SEBT call center with an updated address, that information can be updated in the

		case file and the benefit card would then be resent to the updated address. They will be instructed to contact the school to update their records.
18	Column K Student Address Line 2	This is a 35-digit and character maximum. For example: Apt 2B, Suite 101, Floor 3, Room 205, Unit 5C, P.O. Box 123, Department 45 or any additional information that specifies a specific location within a larger building or address, like apartment numbers, suite numbers, floor levels, or department names. Benefits cards CANNOT be forwarded by US Postal Service if an address is incorrect or outdated.
19	Column L Student City required field	15-character maximum City name of student's/child's physical mailing address. If the name of the city LONGER than 15 characters you must truncate (shorten) it to a maximum of 15 characters (including spaces). Benefits cards CANNOT be forwarded by US Postal Service if an address is incorrect or outdated.
20	Column M Student State Abbreviation required field	2-character maximum 2 letter state abbreviation. If the state is New York, you MUST enter NY as there are many schools on borders of states that have student/child physically residing in the neighboring state. NOTE: If you put New York, the systems will see "NE" indicating the student/child lives in Nebraska.
21	Column N Student Zip Code required field	15-digit and/or character maximum For example the 5-digit zip code, the 5-digit zip code plus 4-digits, OR country outside of the U.S. zip code if physical address is outside of the United States. See bottom for more education on Zip Codes. NOTE: schools that border Canada (Ontario and Quebec) have enrollments with a physical address Zip Code in Canada. Schools that boarder PA, NJ, CT, MA, and VT may have addresses outside of NY.
22	Column O Phone Number	12-digit and character maximum 999-999-9999 Phone number used as the home phone contact. OTDA uses this to text when benefits are issued or to deliver updated program information.
23	Column P Parent/guardian email	100-character maximum OTDA uses to notify households when benefits are issued or to deliver updated program information.
24	Column Q Primary Parent/Guardian <u>First and Last Name (Primary)</u> required field	70-character maximum OTDA uses this when the call center must match the parent/guardian name on file to receive ANY type of Customer Service. If someone calls the SEBT Helpline inquiring about benefits and the name of the caller does not match the Parent/guardian name on file, they will not be able to access any information on the account.
25	Column R Secondary Parent/Guardian <u>First and Last Name (Secondary)</u>	70-character maximum OTDA uses this when the call center must match the parent/guardian name on file to receive ANY type of Customer Service. If someone calls the SEBT Helpline

		inquiring about benefits and the name of the caller does not match the Parent/guardian name on file, they will not be able to access any information on the account.
26	Column S Student Enrollment Start Date required field	8-digit maximum First date of enrollment for the current school year. Must be all digits (ONLY) in MMDDYYYY order. For example 09072024
27	Column T Student Enrollment End Date required field	8-digit maximum Last date of enrollment for the current school year. If student/child was enrolled the entire school year, the last day of your current school year should be used. Must be all digits (ONLY) in MMDDYYYY order. For example 06302025
28	Column U Free and Reduced-Price Status required field	1-character maximum Enter Y if student/child has a Free or Reduced-Price Eligible. Enter N if student/child is not Free or Reduced-Price Eligible. Blank or Null cells will be considered “Not Free or Reduced-Price Eligibility Status” <i>For student enrolled in a CEP/Provision 2 (P2) non-base year school: ONLY enter Y if the student is eligible based on DCMP, reside in the same household as a DCMP student, are Migrant, Homeless, Runaway, or have Foster Care Status. The Community Eligibility Provision (CEP)/Provision 2 non-base year Household Income Eligibility Form or any other form cannot be used to determine student Free or Reduced-Price status. These students may apply for benefits with OTDA who will then determine income eligibility.</i>
29	Column V Migrant Education required field	1-character maximum Enter Y if student/child is a child of a Migrant family. Enter N if student/child is not a child of a Migrant family. Blank or Null cells will be considered “Not Migrant” Migrant students/children are not Immigrants . Migrant students are a child whose family moves to find seasonal or temporary work in agriculture, dairy, or fishing and receiving migrant educational services . Migrant students/children are streamlined certified to receive SEBT benefits. Leaving blank or N will result in no benefits received .
30	Column W Student in Foster Status required field	1-character maximum Enter Y if student/child is in Foster Care Status. Enter N if student/child is not in Foster Care Status. Blank or Null cells will be considered “Not in Foster Care Status” Students/children in Foster Care Status are streamlined certified to receive SEBT benefits. Leaving it blank or N will result in no benefits received .
31	Column X Homeless Status required field	1-character maximum Enter Y if student/child is homeless. Enter N if student/child is not homeless. Blank or Null cells will be considered “Not homeless”

		Nonpublic schools have the ability to directly certify students/children for free school meals if they are identified as homeless. Although the McKinney-Vento Homeless Assistance Act applies only to public schools, <i>non-public schools are encouraged to establish a homeless or runaway liaison and use documentation from shelter directors, public school liaisons, or the State Coordinator for Education of Homeless Children and Youth</i> to determine a child's eligibility for free meals based on the child's homeless status.
32	Save your MS Excel file	<i>Click "Save As" and save this file to your local Personal Computer (PC). Close the MS Excel file.</i>
33	In IDEX, click on the <i>"Bulk Upload"</i> button	To start the bulk upload process. This will open up a pop-up window where you can select your file from where you saved it on your personal computer (PC)
34	<i>Select the file</i> you saved (#29) to upload	This is where you select your saved file you want to upload. Click "open" to see it selected onscreen in the application. This is the closed MS Excel file you saved to your own network.
35	Click <i>"Upload File"</i>	After selecting your file, click the blue button "Upload File"
36a OR	Look at your screen. If your upload is successful, the popup window will close and you will see <i>"This form is in the process of Bulk Loading."</i> That means that the validations have passed (your template is in the correct format) and it is completing the Bulk Upload process.	The button <i>"Show Upload Log"</i> will become active. You may have to wait a few moments depending on how long your file is. When it passes the <i>"Show Upload Log"</i> button will be blue.
36b	Look at your screen. If there are any errors in your form, it will NOT upload and you will see one or more error message <i>"One or more institutions in your file cannot be submitted by your institution ID"</i> Note: if your file uploads but the validations (formats in a cell) are incorrect you will receive an error message.	If your form does not load or it loads but the validations are incorrect and does not allow to complete the Bulk Upload process, the <i>"Show Upload Log"</i> button will be red and you MUST continue with step #33.
37	Click on <i>"Show Upload Log"</i>	To <i>see and review</i> the current status of your file.
37a OR	<i>If you see the status as "Error File Created"</i>	<i>click on the link in the "file" column to view the error report. Open the first sheet (tab), "ERRORS_INDEX," find the error (link). Click on the link and it will automatically bring you to the field in the form (second sheet/tab) you need to update.</i> <i>Then "Save As" the original file name (DO NOT save as the "error-file" name). Go Back to step #33 and repeat.</i>
37b	<i>If you see "Bulk Upload Complete"</i>	<i>You are almost done! You have uploaded your file, but you</i>

OR		have not submitted your file. Continue with step #38 (below)
37c	If you see “Server Error”	Close out (“x”) the Status History Page and upload your file again and repeat starting with step #33.
38	Exit out (click “X”) of the Status History page.	Click on the “x” in the top right corner of the Status History page.
39	CAUTION: Once you click submit you will no longer be able to upload any additional forms. If FINAL, Click “Submit”	Click submit only when you are absolutely certain the file is complete and correct.
40	Click the “X” in the top right hand corner of the screen.	To close your active screen.
41	Click the log out button on the top right corner of the NYSED application business portal.	To log out of the application business portal.

Additional Resources

If you have any questions regarding the EBT program, please go to the [OTDA Summer EBT Website](#).

If you have any questions regarding form submission, please use the links provided in this guidance.

If further assistance is needed, please reach out to the Office of Information and Reporting Services via [Datasupport](#). Datasupport is the NYSED Office of Information and Reporting Services online help desk that allows all inquiries to be directly routed to the data subject matter expert who is best suited to respond in the quickest manner possible.

New York City Religious and Independent Schools: If you need additional support please contact ONPSInfo@schools.NYC.gov.

Further Zip Code education

5-digit Zip Code

Digit 1 = Identifies the national area in which the address is located.

Digit 2 and 3 = Identifies the sectional center or large city post office location.

Digit 4 and 5 = Identifies the associate post office or delivery area.

Plus 4 or +4 Zip Codes

The extra 4 digits on ZIP Codes identify segments of postal delivery routes. Unlike the digits in a 5-digit Zip Code, routes are fluid. Since routes change frequently the 9-digit ZIP Code changes to align with the changes of the route. Although a five-digit ZIP Codes may change it occurs much less frequently than the +4 (last 4 digits of a 9-digit Zip Code). The ultimate benefit of the 9 digit Zip Code is cleaner address data.