

## Essential Info for Nonpublic School CEOs

If your school participates in a National School Lunch Program (NSLP), you must submit a **full student roster** for the current 2025-26 school year for all students enrolled at your school regardless of free or reduced priced lunch (FRPL) eligibility. Please see below for the data to be submitted. More details:

[OTDA.ny.gov/SummerEBT](https://otda.ny.gov/SummerEBT).

### Access Reminder for CEOs

All CEOs of NSLP-approved religious and independent schools have account access to the “Summer EBT Form 2026” in the IDEX application via the [NYSED Application Business Portal](#). Please see our [IDEx webpage](#) and [IDEx Help Center](#) for more information.

Access is tied to each school’s **BEDS Code**. A CEO overseeing multiple BEDS codes must log into each **account** and complete the **form for each school** they oversee. CEOs may delegate access through **SEDDAS** ; assign the “submit/certify” role.

### Additional Resources

**New York City Religious and Independent Schools:** If you need additional support please contact [ONPSInfo@schools.NYC.gov](mailto:ONPSInfo@schools.NYC.gov).

**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 guide.

**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. **Please type “Summer EBT” in the subject line.**

## User Directions

**Steps 1 – 7** explain how to access the application and download the Microsoft Excel Summer EBT Form 2026.

**Steps 8-37** explain each column in the MS Excel Summer EBT Form 2026 and show what information must be entered for each student. **Each row = one student.**

**Steps 38 – 48** guide the user through the final upload, submission, closing, and log out process.

Step	Directions	Notes
1	Go to <a href="https://portal.nysed.gov/abp">https://portal.nysed.gov/abp</a>	
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 (IDEx) application displaying your current forms. You may need to search for the form “Summer EBT Form 2026” if it is not on page 1.
5	Click on “Summer Electronic Benefit Transfer (EBT)” next to Collection Year 2025-26 in the IDEx	This is the current school year collection template (form).

	browser tab that opened in step 4.	
6	Click on “Download Template.”	
7	Go to your personal computer (PC) downloads folder for the Excel file name “Summer_Electronics_Benefit_Transfer_<School year>.xlsx”	Open the Excel file and enter the data as indicated (Steps 8 – 30).
8	<b>Column A</b> BEDS Code <b>required field</b>	<b>12-digit number</b> school’s location BEDS code. If you do not know your BEDS code, please use <a href="#">SEDREF</a> .
9	<b>Column B</b> Individual Student Local ID <b>required field</b>	<b>9-digit maximum</b> . You MUST use the same local ID for the student. Never reuse local ID numbers. OTDA uses this number for matching and deduplicating errors in student records.
10	<b>Column C</b> NYSSIS ID	<b>10-digit number</b> . OTDA uses it to match and deduplicate errors in student records.
11	<b>Column D</b> Student’s First Name <b>required field</b>	<b>35-character maximum</b> Used to match student. No name, no benefits issued.
12	<b>Column E</b> Student’s Middle Initial	<b>1-alpha character maximum NO Punctuation</b> . Used to match students with same First/Last name.
13	<b>Column F</b> Student’s Last Name <b>required field</b>	<b>35-character maximum</b> Used to match student. No name, no benefits issued.
14	<b>Column G</b> Student’s Gender	<b>1-alpha character maximum M (Male), F (Female), or N (Nonbinary)</b> .
15	<b>Column H</b> Student Date of Birth <b>required field</b>	<b>10-digit/characters</b> OTDA uses DOB as a security feature to access benefits. <b><i>If the DOB is incorrect, the student will not be able to access benefits.</i></b>
16	<b>Column I</b> Student Street Address, their physical home mailing address <b>required field</b>	<b>35-digit and character maximum mailing address where benefit card is mailed . <i>Benefits cards CANNOT be forwarded by US Postal Service if an address is incorrect or outdated</i></b>
17	<b>Column J</b> Student Address Line 2	<b>This is a 35-digit and character maximum</b> . 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. <b><i>Benefits cards CANNOT be forwarded by US Postal Service if an address is incorrect or outdated.</i></b>
19	<b>Column K</b> Student City <b>required field</b>	<b>45-character maximum</b> City name of student’s physical mailing address. <b><i>Benefits cards CANNOT be forwarded by US Postal Service if an address is incorrect or outdated.</i></b>
20	<b>Column L</b> Student State Abbreviation <b>required field</b>	<b>2-character maximum</b> 2-letter state abbreviation. If the state is New York, you <b>MUST enter NY</b> as there are many schools on borders of states that have students physically residing in the neighboring state.

21	<b>Column M</b> Student Zip Code <b>required field</b>	<b>15-digit and/or character maximum</b> For example the <b>5-digit zip code, the 5-digit zip code plus 4-digits, OR country outside of the U.S. zip code</b> if physical address is outside of the United States. See bottom for more education on Zip Codes.
22	<b>Column N</b> Student Enrollment Start Date <b>required field</b>	<b>10-digit/character maximum</b> First date of enrollment for the current school year.
23	<b>Column O</b> Student Enrollment End Date <b>required field</b>	<b>10-digit/character maximum</b> Last date of enrollment for the current school year.
24	<b>Column P</b> Free or Reduced Price Eligibility	<b>1-character maximum</b> Enter <b>Y</b> if student is <b>Free or Reduced-Price Lunch</b> eligible. Enter <b>N</b> if student is <b>not Free or Reduced-Price Lunch</b> eligible. <b>Blank or Null</b> cells will be considered <b>“Not Free or Reduced-Price Eligibility Status”</b>  <i><b>NOTE: Students enrolled in a Provision 2 (P2) non-base year may be reported as FRPL eligible (Y) ONLY when confirmed through DCMP, residing in the same household as a DCMP student, is Migrant, Homeless, Runaway, or has Foster Care Status.</b></i>  <i><b>The alternate income form (survey) cannot be used to determine student income-eligibility for Free or Reduced-Price Lunch status.</b></i>
25	<b>Column Q</b> Migrant Education <b>required field</b>	<b>1-character maximum</b> Enter <b>Y</b> if student is a child of a migrant family. Enter <b>N</b> if student is not a child of a migrant family. <b>Blank or Null</b> cells will be considered <b>“Not Migrant”</b>  Migrant students <b>are not Immigrants</b> . A migrant student is <b>a child whose family moves to find seasonal or temporary work in agriculture, dairy, or fishing and is receiving migrant educational services</b> . Migrant students <b>are streamlined certified</b> to receive SEBT benefits. Leaving <b>blank or N</b> will result in <b>no benefits received</b> .
26	<b>Column R</b> Student in Foster Status <b>required field</b>	<b>1-character maximum</b> Enter <b>Y</b> if student is in <b>Foster Care Status</b> . Enter <b>N</b> if student is not in <b>Foster Care Status</b> . <b>Blank or Null</b> cells will be considered <b>“Not in Foster Care Status”</b>  Students in <b>Foster Care Status</b> <b>are streamlined certified</b> to receive SEBT benefits. <b>Leaving it blank or N</b> will result in <b>no benefits received</b> .
27	<b>Column S</b> Homeless Status <b>required field</b>	<b>1-character maximum</b> Enter <b>Y</b> if student is <b>homeless</b> . Enter <b>N</b> if student/child is not <b>homeless</b> . <b>Blank or Null</b> cells will be considered <b>“Not homeless”</b> . A child in a state of <b>homelessness at any point during the school year</b> are to be reported as <b>Y</b> for <b>summer EBT</b> benefits.

		Nonpublic schools have the ability to directly certify students for free school meals if they are identified as homeless. Although the McKinney-Vento Homeless Assistance Act applies only to public schools, <b><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></b> to determine a child's eligibility for free meals based on the child's homeless status.
28	<b>Column T</b> FRPL Eligibility Type (School Program)	<b>1-character maximum</b> Enter <b>Y</b> if student is enrolled in a P2 school and an alternate form was used to determine economically disadvantaged (poverty) status.
29	<b>Column U</b> SNAP (Supplemental Nutrition Assistance Program)/Medicaid (DCMP)	<b>1-character maximum</b> Enter <b>Y</b> if the school used the DCMP (Direct Certification Management Process) to determine the student's FRPL eligibility. Blank or Null cells will be treated as N.
30	<b>Column V</b> Food Distribution Program on Indian Reservations (FDPIR)	<b>1-character maximum</b> Enter <b>Y</b> if the school used the FDPIR status to determine the student's FRPL eligibility. Blank or Null cells will be treated as N.
31	<b>Column W</b> Head Start	<b>1-character maximum</b> Enter <b>Y</b> if student is participating in Head Start at any point during the current school year.
32	<b>Column X</b> Primary Parent or Guardian first and last name (Parent_1 or Guardian_1) <b>required field</b>	<b>70-character maximum</b> Enter the primary guardian's full name (first and last name)  This must match the parent/guardian name on file to receive ANY type of customer service. If someone calls the SEBT Helpline inquiring about benefits <b>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.</b> New benefit cards for the student are mailed to the attention of the primary guardian.
33	Column Y Primary Parent/Guardian Phone Number (Parent 1 or Guardian 1)	<b>15-digit/character maximum</b>  OTDA uses the primary parent or guardian phone number to contact households when benefits have been issued and to deliver updated program information.
34	Column Z Primary Parent/Guardian email address (Parent 1 or Guardian 1)	<b>100-digit/character maximum</b>  OTDA uses the primary parent or guardian email to notify households that benefits were issued, or to deliver updated program information when possible.
35	Column AA Secondary Parent/Guardian First and Last Name (Parent 2 or Guardian 2 full name)	<b>70-character maximum</b> Enter the secondary guardian's full name (first and last name)  OTDA uses 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 <b>and the name of the caller does not match the parent/guardian name on file, they will not be able to access</b>

		<b>any information on the account.</b> New benefit cards for the student are mailed to the attention of the primary guardian.
36	Column AB Secondary Parent/Guardian phone number (Parent 2 or Guardian 2 phone number)	<b>15-digit/character maximum</b>  OTDA uses the secondary parent or guardian phone number to contact households when benefits have been issued and to deliver updated program information.
37	Column AC Secondary Parent/Guardian email address (Parent 2 or Guardian 2 email address)	<b>100-digit/character maximum</b>  OTDA uses the secondary parent or guardian email to notify households that benefits were issued, or to deliver updated program information when possible.
38	Save your MS Excel file	<b>Click "Save As" and save this file to your local PC. Close the MS Excel file.</b>
39	In IDEX, <b>click on the "Bulk Upload"</b> button	To start the bulk upload process. This will open a pop-up window where you can select your file from where you saved it on your PC.
40	<b>Select the file</b> you saved (#29) to upload	Select your saved file 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.
41	<b>Click "Upload File"</b>	After selecting your file, click the blue button "Upload File"
42 option 1  OR	Look at your screen. If your upload is successful, the popup window will close and you will see <b>"This form is in the process of Bulk Loading."</b>  That means that the validations have passed (your template is in the correct format) and it is completing the Bulk Upload process.	The button <b>"Show Upload Log"</b> will become active.  You may have to wait a few moments depending on how long your file is.  When it passes, the <b>"Show Upload Log"</b> button will be blue.
42 option 2	Look at your screen. If there are any errors in your form, it will NOT upload and you will see one or more error messages <b>"One or more institutions in your file cannot be submitted by your institution ID"</b>  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 completion of the Bulk Upload process, the <b>"Show Upload Log"</b> button will be red and you MUST return to step #33.
43	Click on <b>"Show Upload Log"</b>	To <b>see and review</b> the current status of your file.
44 option 1	<b>If you see the status as "Error File Created"</b>	<b>Click on the link in the "file" column</b> to view the error report. <b>Open the first sheet</b> (tab), <b>"ERRORS_INDEX,"</b> find the error (link). <b>Click on the link and it will automatically bring you to the field in the form (second sheet/tab) you need to update.</b>  <b>Then "Save As" the original file name (DO NOT save as the</b>

OR		<i>"error-file" name</i> ). Go Back to step #33 and repeat.
44 option 2 OR	<i>If you see "Bulk Upload Complete"</i>	<i>You are almost done! You have uploaded your file, but you have not submitted your file. Continue with step #38.</i>
44 option 3	<i>If you see "Server Error"</i>	<i>Close out ("x") the Status History Page and upload your file again, then repeat starting with step #33.</i>
45	Exit out (click "X") of the Status History page.	<i>Click on the "x" in the top right corner of the Status History page.</i>
46	<b>CAUTION:</b> Once you click "submit" you will no longer be able to upload any additional forms.  <b>If FINAL, click "Submit"</b>	<i>Click "submit" only when you are absolutely certain the file is complete and correct.</i>
47	Click the "X" in the top right hand corner of the screen.	<i>To close your active screen.</i>
48	Click the <b>log out button</b> on the top right corner of the NYSED application business portal.	<i>To log out of the application business portal.</i>

#### Best practices **IMPORTANT Lessons learned**

- **Download and use a new form each year** and enter data into the current school year.
- **If your file fails** or shows errors, **download the IDEX error report**, fix the highlighted issues, and re-upload.
- **Keep the same local ID for returning students.**
- **If your local data system does not generate a local student ID, please** see [guidance on Datasupport](#) for creating a local ID.
- In Excel, **a red triangle in the top right corner of a cell** indicates an error. Hover over it to see how to fix it.
- **DO NOT "submit" until all student and parent information is complete.** Once submitted, no changes can be uploaded. **Students without complete information included in the final submitted form will be ineligible to receive benefits.**
- **You may upload as many times as needed, until you click "submit."**
- Each upload must include **the entire updated File, not just changes.**
- After clicking "submit," no further edits are allowed.
- **You are finished only when you scroll down to see "submission successful" in IDEX.**
- The screen **must display "submission successful" before the deadline or students will not receive benefits.**
- If you submit by mistake, request a form reset through [Datasupport](#). Include your full name, 12-digit BEDS code, work email, work phone, and your request to reset the "Summer EBT" form.