

Web Portal User Guide

Heart-Check Food Certification Program



1

Table of Contents

Overview	2
The Web Portal allows you to:	2
Getting Started - Portal Log In	2
Forgot Password	2
Terms of Use and Privacy Policy Acceptance	3
Change Password	3
Welcome Page - Products / Recipes	4
Product / Recipe Search Results	4
Trade Association Sublicensee	5
Add Product	5
Add Product - Product Details	6
Add Product - Product Info	7
Add Product - Whole Grain	8
Add Product - Nutritional Info	9
Add Product - Packaging Info	10
Duplicate File Name	10
Add Product - Payment Info	11
Additional Package Sizes	11
Add Additional Package Sizes - Product Details	12
Add Additional Package Sizes - Nutritional Info	14
Add Additional Package Sizes - Packaging Info	15
Add Additional Packaging Info - Payment Info	16
Manage Products	17
Multiple Renewals	18
Multiple Renewals Confirmation	19
Multiple Deactivations	19
Edit Product	21
Edit Product – Product Details	21
Edit Product – Product Info	21
Edit Product - Nutritional Info	22
Edit Product – Packaging Info	23
Duplicate File Name	23
Edit Product – Payment Info	24
Sublicensee - Renew Product	24
Sublicensee – Review Product	25
Add Recipe	29
Add Recipe - Recipe Details	29
Add Recipe - Recipe Info	30
Add Recipe - Nutritional Info	31
Add Recipe - Recipe Attachments	32
Add Recipe - Payment Info	33
Manage Recipes	34
Renew Recipe - Edit Recipe	37

Overview

The Heart-Check Food Certification Program Web Portal is where all products and recipes are submitted for certification and managed. All features are available on both desktop computer and mobile devices and are built in responsive design that responds to the orientation of each device in use. This application was built for optimal use in the Chrome browser. Some elements and colors may appear differently when using other browsers.

It is recommended that users not use the browser back button to navigate the application. Using the browser back button instead of navigating using options within the application may cause users to lose unsaved data.

The Web Portal allows you to:

- Submit new products for certification
- Renew currently certified or expired products
- Add additional sizes to currently certified products
- View all your products that are in process, submitted for review, or currently certified
- Upload updated packaging details for your products
- Deactivate products you no longer wish to certify

Once your Company Application is submitted, you will receive an invitation email from *"fcpsupport@heart.org"* with a link to complete registration and create a login to the Web Portal. If you do not receive the email, be sure to check your spam folder and allow messages from the American Heart Association. Add **FCPSupport@heart.org** to your email address book or Safe Sender list to be sure to receive future automated emails about your account.

If you do not receive the invitation email after checking your spam folder, contact us at <u>certify@heart.org</u> or call (214) 706-1160.



Getting Started - Portal Log In

Image 1

- Navigate to the Web Portal
- Enter the corporate email address and password for the primary contact set during registration. (Image 1)

Forgot Password



Forgot Password

Please enter your email address to reset the password:

*	Indicates	a	required	fiel	c
---	-----------	---	----------	------	---

Email Address *	How do you want to reset your pas	ssword? *
	O Reset password via email.	Reset password via Security Questions.
Reset Password Cancel		
	Image 2	

- Click Forgot Password link on login screen (Image 1)
- Enter email address (Image 2) and select a method of recovery:

- Reset password via email.
- Reset password via Security Questions.
- Reset password via email sends an email with link to reset the password.
- Reset password via Security Questions prompts security questions as set-up during registration.

Terms of Use and Privacy Policy Acceptance

Terms of Use and Privacy Policy Acceptance	
The terms of use and privacy policy has been Please accept the updated terms of use and p policy. I have read and understood the <u>Terms of</u> <u>Privacy Policy</u>	orivacy
Submit Cancel	
Privacy Policy	<u>Use</u> and



- Upon first login after the Terms of Use or Privacy Policy got updated, you will be prompted to check the checkbox to accept the updated Terms of Use and Privacy Policy and Submit. (*Image 3*)
- Only after accepting the updated Terms of Use and Privacy Policy, will you be able to log in to the application.

hange Password							
Ģ		Home	Change Password	Product 🗸	Recipe 🗸	Full Name Logout	
Change P	assword						
User Name Email Address	Full Name fullname@netlink.com						
Password must be mir All fields are required	nimum of 7 characters. Must have	e at least one	e uppercase letter, one low	vercase letter and	d a number		
Password		Confirm Pa	ssword				
Submit C	ancel						
			Image 4				

- Password must be minimum 7 characters.
- Password must have at least one uppercase letter, one lowercase letter and a number.

'elcome Page - Pro	oducts / Recipes				
Ģ		Home Change Pa	ssword Product	✓ Recipe ✓	Full Name Logou
Welcome Fu	ll Name				
Renew Products	and/or New Additional Siz	es			d quicker.
My Certificatio	ress, Submitted" & "Certified" stat	us that require additional info	ormation to be submitted fo	or certification review. Click "	Edit" on an individual product
Category	Status	I	Name		
Product	~ All	~	Test		
Search Product	Reset Search Criteria				Export To Excel
Action	Name	Status	UPC Code	Package Size	PLA Start Date
<u>Deactivate Renew</u>	Test Product	Certified		450 gm	06/01/2021
		Ima	ge 5		

Once logged in, you may view and search the Products and Recipes you have submitted for certification by using the search

boxes provided. (*Image 5*) You can also download a PDF of this User Guide.

- Search Products or Recipes by:
 - Category This will default according to the section selected. (Image 5)
 - o Status
 - o Name

٠

- View Products or Recipes by Status:
 - In Progress A product or recipe submission that is not yet completed.
 - Submitted A completed product or recipe submission that is currently under review by the Heart-Check program staff.
 - Certified Products or recipes completed and currently certified.
 - Expired Products or recipes expiration date has passed and currently expired.

Product / Recipe Search Results

- Action:
 - Edit / Delete Edit or delete products or recipes "In Progress" of the submission process.
 - Deactivate Deactivate products or recipes.
 - o Renew Renew products or recipes.
- Name:
 - Displays product or recipe name.
- Status:
 - Displays product or recipe status (i.e. In Progress, Submitted, Certified or Expired)".
- UPC Code:
 - Displays product UPC code if provided while adding product.
- Package Size:
 - Displays the product package size.
- PLA or RLA Start Date:
 - Displays product License Addendum (PLA) or Recipe License Addendum (RLA) Start Date if the product is in certified status.
- PLA or RLA End Date:
 - Displays product License Addendum (PLA) or Recipe License Addendum (RLA) End Date if the product is in certified or deactivated status.
- License Type:
 - \circ $\;$ Displays the Product License Type based on the product type selected.
- Product Type:
 - Displays type of product selected while adding product i.e. Branded Product, Branded Commodity, Brand Form Variation or Variety Pack.

4

rade Association Su	blicensee					
Ģ		Home	Change Password	Product 🗸	Recipe 🗸	Full Name Logou
Welcome Ful	l Name					
We recently made some up	odates to our web por	tal to make tł	ne product and rec	ipe submission	process easier a	and quicker.
As a customer, you can: • Add New Products an • Renew Products • View your Submitted • Download <u>Web Porta</u>	and Certified product		updated packagin	g PDFs for ther	n	
My Certification	าร					
There are some products "In Progre below in the "Product In Progress" t		atus that require a	additional information to	be submitted for ce	ertification review. Clic	ck "Edit" on an individual product
Product Recipe						
_						
Category	Status		SL Produ	ict Name		
Sublicensee	✓ All		v			

• For Trade Association companies, the Category drop-down "Sublicensee" will be available. For all other companies, this drop down is inactive and is determined by the screen you are on. (*Image 6*)

Image 6

Package Size

PLA Start Date

生 Export To Excel

License Type

PLA End Date

• Search Products or Recipes by:

Name

Search Product

No items to show...

Action

a. Category – Sublicensee option is available only for Trade Association companies.

UPC Code

Reset Search Criteria

Status

- b. Status only certified, submitted (submitted for renewal) and expired status products are available to view for sublicensee category.
- c. SL Product Name Sublicensees and their products can be searched by Sublicensee Product Name.



• To add a product to be certified, navigate to Product > Add Product in the header navigation. (*Image 7*)



Ģ	Home	e Change Password Product	✓ Recipe ✓ Sull Name
Add Produc	t		
Product Details Prod	duct Info Nutritional Info Pack	aging Info Payment Info	
All fields are required			
Has UPC Code?	Reason	UPC Code	Product Name
			r roddoe r tarreo
Yes	✓ Select		
Yes Package Size	✓ SelectServing Size	 Serving Size UoM 	Type of Product What's this?
	Serving Size	Serving Size UoM	Type of Product <u>What's this?</u>

- On the Add Product screen, add all required information in the section order as they appear on screen. Each section is unavailable until the previous section is completed. **Note:** To return to the previous section, click on the specific section and do not use browser's back button as this will erase all work if not saved as draft. (*Image 8*)
 - 1. Product Details
 - 2. Product Info
 - 3. Nutrition Info
 - 4. Packaging Info
 - 5. Payment Info
- Has UPC Code? Select Yes or No.
- If No, select the Reason from the drop-down.
- On product details screen, enter:
 - UPC Code (if any)
 - Product Name
 - Package Size
 - Serving Size / Unit of Measure (UoM)
 - Type of Product Clicking "What's this?" Opens a pop-up window with definitions for each type of product allowed:
 - **Branded Product** A single standard product that is sold under a specific brand name.
 - Brand Form Variation A reduced fee structure is allowed when products' Nutrition Facts panel and ingredient list are identical and the products only differ by the label or form. For example, a single private-label product that is sold under different names.
 - Branded Commodity When a commodity product is marketed or packaged displaying a brand name and the submitting company is a member of a Trade Association that certifies the same commodity product. For example, Goldheart Farms Broccoli.
 - **Commodity** When fresh produce is sold without a brand name.
 - Variety Pack A variety pack presents a unique circumstance based on certifiability and/or certification of the individual products within the variety pack and whether or not they are sold separately. Additionally, variety packs are typically marketed and promoted as separate or unique products which necessitates additional review and approvals beyond typical serving and packaging size variations. Therefore, the reduced fee schedule that applies to brand and form variation will also apply to variety pack pricing.
 - If you're unsure about which product type to choose, **ask your Business Development Manager or** contact us at <u>certify@heart.org</u> or (214) 706-1160.
 - Trade Association
 - This drop down is only active if Branded Commodity is selected for Product Type and then requires a selection to be made.
 - o Main Product
 - This drop down is only active when Brand Form Variation is selected for Product Type and then it requires a selection to be made.
- Save & Continue to proceed to add Product Information.
- Save As Draft to complete and submit the form later.
- Products saved as a draft are available on the Home Page and will be shown as "In Progress" status."

• Duplicate UPC Code

Add Product	Duplicate UPC Warnin	-	
Product Details Product Info Nut	another product. Please ens correct.	-	
Product NameTestCompany NameMy Company	Cancel	nue	
All fields are required			
Has UPC Code? Re	ason	UPC Code	Product Name
Yes v	Select V	897609825413	Test
Package Size Se	rving Size	Serving Size UoM	Type of Product <u>What's this?</u>
500 gm	45	Grams ~	Branded Commodity
Trade Association M	ain Product		
My Company V	Select V		
Save & Continue Save As Dra	aft Cancel		
	Image	9	
	mage	-	



	, , , , , , , , , , , , , , , , , , ,	disclosure required.)		
Save As Draft	Cancel			

7

- Enter Product Info for the required fields:
 - Guideline The Guideline selection will prompt different options on subsequent screens.
 - FDA/USDA Products Subcategory Code
 - Grocery Store Primary Location Not required

- Certification Requested / Product Category
- Does this product compete with or position itself as a Supplement, Meal Replacement or Weight-Loss Product? Not required
- Grocery Food Category
- List any Non-GRAS Ingredients (Generally Recognized as Safe Complete disclosure required.)
- If you check Yes for the question, "Does this product compete with or position itself as a Supplement, Meal Replacement or Weight-Loss Product?" you will be unable to continue certifying that product.

The Heart-Check Program does not currently allow certification for supplements, weight loss products, or meal replacements. As such, your product would not be eligible for certification at this time. If you feel you have reached this message in error, please contact your Business Development Manager or notify us by calling 214-706-1160 or emailing <u>certify@heart.org</u>.

- If No, you may proceed.
- Save & Continue to proceed to Nutrition Info.

Add Product - Whole Grain

Add Product

Company Name A Sample Heart Check Company

Product Details Product Info Whole Grain Nutritional Info Packaging Info Payment Info

Please Provide:

The "raw" (not rounded) gram weight of each whole-grain ingredient used in this product per 100 grams of the product
 The dietary fiber yield (grams) per 100 grams of each whole-grain ingredient.
 Note: Flaxseed and other seeds are not considered cereal grains and may not be applied to the \$1% requirement.

Whole-grain Ingredient	Cram weight per 100 grams of product	Dietary Fiber yield in each ingredient (per 100 grams)
Brown Rice	•	3.5
Buckwheat	•	10
Bulgur (Cracked Wheat)	•	18.3
Millet	•	85
Papcom	•	•
Quinoa	•	E9
Sorghum	•	9
Triticale	•	14.6
Whole Oats/Oatmeal	•	10.6
Whole Rye	0	14.6
Whole Wheat	•	12.2
Whole-grain Barley	0	173



- If the Guideline selected for Product Info (*Image 10*) was Whole Grain, then a Whole Grains section is available in the navigation menu (*Image 11*) and nutritional facts for that whole grain product must be entered.
- Please provide:
 - a. The "raw" (not rounded) gram weight of each whole-grain ingredient used in this product per 100 grams of the product.
 - b. The dietary fiber yield (grams) per 100 grams of each whole-grain ingredient.
- Additional whole grain ingredients not already listed may be added using blank fields provided.
- Save & Continue to proceed to Nutritional Info.

```
Add Product - Nutritional Info
```

Company Name A Samp	le Heart Check Company				
oduct Details Product In	fo Nutritional Info Pac	kaging Info Pay	ment Info		
ving Per Container S	erving Size	Serving Size Uo	M Calories		Calories From Fat
	85	Grams	v •		•
Fats & Others			Sugars		
Total Fat (g)	0		Total Sugar (g)	0	
Saturated Fat (g)	•		Added Sugar (g)	•	\supset
Trans Fat (g)	0		Positive Nutrients		
Monounsaturated Fat (g)	•		Vitamin A (%)	•	
Polyunsaturated Fat (g)	•		Vitamin C (%)	0	
Cholesterol (mg)	0		Calcium (%)	0	
Sodium (mg)	0		Iron (%)	0	
			Dietary Fiber (%)	•	
			Vitamin D (%)	•	
			Protein (%)	0	
Additional Nutrition Info	% Dai	ily Value	Other Nutrients		% Daily Value
Total Carbohydrates 0 (g)	•			0	•
				0) (•

Protein (g)	
Potassium o (mg)	
Save & Continue Save As Draft Cancel	

Image 12

- Enter Nutritional Info as it appears on the Nutrition Facts Panel of your product.
- Some Nutritional Info fields are dependent upon selections made on the previous Product Info screen and will display based on those choices. (*Image 10*)
 - o If an Oil guideline was selected for Product Information, then two additional nutritionals are required on Nutrition Info:
 - Grams of 'X' Oil Per RACC
 - Grams of 'X' Oil / 100 gm

- If High Oleic guideline was selected for Product Information, then two additional nutritionals are required on Nutrition Info:
 - % of High Oleic / tablespoon
 - High Oleic Fatty Acids (gm)/RACC
- If Fish with Omega-3 guideline and Certification requested / Product Category as Omega-3 was selected, then two additional nutritionals are required on Nutrition Info:
 - Omega -3 EPA (mg) Per 85 g (3 oz cooked)
 - Omega -3 DHA (mg) Per 85 g (3 oz cooked)
- o If Fish, Nuts or Macadamia nuts are selected then two additional nutritionals are displayed and are optional:
 - Added Fats
 - Added Carbohydrates
- Save & Continue to proceed to Product Packaging Info.

Add Product - Packaging Info

Add Proc	duct						
Company Nam	ABC company						
Product Details	Product Info Nutr	itional Info Packagir	ng Info Payment I	nfo			
* Indicates a require	ed field						
UPC	634608000654		Upload	Packaging File *			
Package Size	8			can upload multiple F name should not be m			luct.
Serving Size	1		• Max	file size allowed: 25 M	В.		
Serving Size UoM	Ounces		Choose	File No file chos	sen Up	load File)
Action		File Name		Upload [Date		
Save & Continu	e Save As Dra	ft Cancel	lan a a 12				
o add packaging	info [.]		lmage 13				
	it not exceed 150 ch	aracters.					
File size should	d not be more than	25 megabytes.					
		ed. (PDF, JPEG or JP					
Click Choose F Click Upload fi		ging file from your o	device.				
•	ue to proceed to Pa	vment Info.					
		,					
uplicate File Na	me						
ő		Home	Change Password	Product 🗸	Recipe 🗸	8	Vikas Kumar <u>Logou</u>
		Confirm Subm	hission				

Add Product	Confirm Submission	
Product Details Product Info Nuti	File with the same name exists, do you want to proceed?	
Product NameTestCompany NameMy Company	No Yes	

Image 14

To upload a file with a duplicate name:

• Click yes or no on the confirmation screen.



• Adding additional package sizes is similar to adding a new product. The information needed for certification must be entered in order as it appears in the sections on the screen. Each screen and section link is unavailable until the previous step is



a. Product		eu as urart								
b. Nutritioc. Packagii										
d. Paymer	-									
Additional Pa	ckage Sizes - Pr	oduct Detail	S							
ő			Home	Change Pas	ssword	Product 🗸	Recipe 🗸	0	Full Name <u>Logo</u>	<u>out</u>
	Iditional F	Dackade	Sizes							
AUU AU		achage	51205							
	ils Nutritional In	_		ent Info						
		_		ent Info						
	ils Nutritional In	_		ent Info						
Product Deta	ils Nutritional In quired field	_		ent Info						
Product Deta	ils Nutritional In quired field	fo Packaging		ent Info						
Product Deta * Indicates a rec Primary Product Select Product	ils Nutritional In quired field act *	fo Packaging Status All								
Product Deta • Indicates a rec Primary Product Select Product Search	ils Nutritional In quired field act * t v Reset Search C	fo Packaging Status All riteria	Info Payme	~						
Product Deta • Indicates a rec Primary Product Select Product Search	ils Nutritional In quired field act *	fo Packaging Status All riteria	Info Payme	~					Add More Sizes	
Product Deta • Indicates a rec Primary Product Select Product Search	ils Nutritional In quired field act * t v Reset Search C	fo Packaging Status All riteria	Info Payme	~	Serving	g Size	Unit of Measu	re L	Add More Sizes	
Product Deta Indicates a rec Primary Product Select Product Search Please select	ils Nutritional In quired field act * Reset Search C ct Primary Product UPC Code	fo Packaging Status All riteria to perform Ad	d More Sizes	~	Serving	g Size	Unit of Measu	re L		

Image 17

- Primary Product:
 - a. All submitted and certified products will populate the drop-down. (*Image 17*) Select the product to add additional package sizes.

• Select a Status:

- a. All
- b. Certified An additional product package size completed and currently certified
- c. In-Progress An additional product package size submission that is not yet completed
- d. Submitted A completed additional product package size submission that is currently under review by the Heart-Check program staff
- Click Add More Sizes button to enter additional package size info on pop-up screen.

6	н	ome Change Password	Product 🗸	Recipe 🗸	Full Name Logout
	Add Additional Package Si	zes	×		
Add Additic		Package Size Name *			
Product Details Nut	Create New Name	Test			
* Indicates a required fiel	Has UPC Code?	Reason			
Primary Product *	Yes v	Select ~			



• Enter required info into the Add Additional Product Sizes pop-up window. (Image 18)

Click Save.

Dup	licate	UPC	Code
	100000	0.0	0000

Add Produce Product Details Prod		Duplicate UPC War The UPC code entered is another product. Please correct.		
	est 1y Company	Cancel	ontinue	
All fields are required				
Has UPC Code?	Re	eason	UPC Code	Product Name
Yes	~	Select 🗸	897609825413	Test
Package Size	Se	erving Size	Serving Size UoM	Type of Product <u>What's this?</u>
500 gm		45	Grams ~	Branded Commodity V
Trade Association	Μ	1ain Product		
My Company	×) (3	Select 🗸		

Image 19

• If you receive the message regarding a duplicate UPC code such as the one shown in *Image 19*, click continue if you wish to enter product details for a product with a duplicate UPC code

ő		Home	Change Passwor	d Product 🗸	Recipe 🗸	Full Name Logout
Add Addi	itional Pack	kage Size	S			
Product Details	Nutritional Info Pac	kaging Info Pa	yment Info			
Indicates a require	d field					
Primary Product *	Stat	us				
Test Product	V All		~			
Search	Reset Search Criteria					
Please select Pr	imary Product to perf	orm Add More Si	zes.			Add More Sizes
Action	UPC Code	Status	Package Size	Serving Size	Serving Size UoM	License Type
<u>Edit Delete</u>	459000000000	ln Progress	200 gm	10	Grams	TA-STD-ADD



- Additional package size will now appear in results grid. (Image 20) ٠
- Clicking the Action "Edit" will prompt the Add Additional Product popup. Clicking "Delete" will delete that Additional size line ٠ item.
- Save & Continue to proceed to Nutritional Info. ٠

Add Additional Package Sizes -	Nutritional Info
Add Additional Pa	ickage Sizes
Company Name A Sample Hea	rt Check Company
Product Details Nutritional Info	Packaging Info Payment Info

* Indicates a required field

Package Size *			
Select	Copy Nutrient Fa	act values from Main Product	
Serving Per Container Serving	Size * Serving Siz	e UoM * Calories	Calories From Fat
• •	Select	v) (0
Fats & Others		Sugars	
Total Fat (g)	,	Total Sugar (g)	•
Saturated Fat (g)		Added Sugar (g)	•
Trans Fat (g)		Positive Nutrients	
Monounsaturated Fat (g)		Vitamin A (%)	•
Polyunsaturated Fat (g)		Vitamin ⊂ (%)	•
Cholesterol (mg)		Calcium (%)	•
Sodium (mg)		Iron (%)	•
		Dietary Fiber (%)	•
		Vitamin D (%)	•
		Protein (%)	•
Additional Nutrition Info	% Daily Value	Other Nutrients	% Daily Value
Total Carbohydrates 0 (g)	•		• •
Fiber (g)	\supset		• •
Soluble Fiber 0		Oils Grams of Canola Oil per RACC	Grams of Canola Oil / 100 g
Protein (g) 0		•	0

Save As Draft Cancel Save & Cont

0



• Enter all required fields.

Potassium

(mg)

- Select Package Size from drop down.
- Select the checkbox Copy Nutrient Fact Values from Main Product to copy the Nutritional Info of the primary product.
- Save & Continue to proceed to Package Info.

dd Addit	tional Packag	Je Sizes		
Company Name	A Sample Heart Check (Company		
roduct Details	Nutritional Info Packagir	ng Info Payment Info		
UPC Code	test14JulyPr			
Package Size	3124			
Serving Size	4			
Serving Size UoM	Grams			
Action	UPC Code	Package Size	Serving Size	Serving Size UoM
Upload View		16	1	Grams
Save & Continue roduct Name a	Save As Draft nd Company Name will	Cancel Image 2 appear on screen.		Grams
Save & Continue Product Name a Primary product O Action O UPC Cod O Package O Serving S O Serving S	nd Company Name will a information will also d e Size Size Size Unit of Measure	Cancel Image 2 appear on screen. lisplay:	2	aging File pop-up. <i>(Image 22)</i>
Save & Continue Product Name a Primary product O Action O UPC Code O Package O Serving S O Serving S	nd Company Name will a information will also d e Size Size Size Unit of Measure	Cancel Image 2 appear on screen. lisplay: dditional package size to p	2	
Save & Continue Product Name a Primary product O Action O UPC Cod O Package O Serving S O Serving S Click the Action	nd Company Name will : information will also d e Size Size Size Unit of Measure "Upload File" for each a	Cancel Image 2 appear on screen. lisplay: dditional package size to p	2	
roduct Name a rimary product	nd Company Name will information will also d e Size Size Size Unit of Measure "Upload File" for each a tional Packag	Cancel Image 2 appear on screen. Iisplay: dditional package size to p Ge Sizes	2	
roduct Name a rimary product	nd Company Name will information will also d e Size Size Size Unit of Measure "Upload File" for each a tional Packag	Cancel Image 2 appear on screen. Iisplay: dditional package size to p Ge Sizes	2	
save & Continue roduct Name a rimary product • Action • UPC Cod • Package • Serving S • Serving S	nd Company Name will information will also d e Size Size Size Unit of Measure "Upload File" for each a tional Packag	Cancel Image 2 appear on screen. Iisplay: dditional package size to p Ge Sizes	2	
Product Name a Primary product Action UPC Cod Package Serving S Serving S Click the Action Add Addi Company Name	nd Company Name will information will also d e Size size size Unit of Measure "Upload File" for each a tional Packag • ABC company Nutritional Info Packag TestVikas321 123321 234	Cancel Image 2 appear on screen. Iisplay: dditional package size to p Ge Sizes	2	aging File pop-up. (Image 22)



To add additional packaging info:

- File name must not exceed 150 characters.
- File size should not be more than 25 megabytes.
- Multiple packaging files are allowed. (PDF, JPEG or JPG files only)
- Click Choose File to select packaging file from your device.
- Click Upload.

oduct	n filename to download the File Name TP001_DTS.pdf	 file Upload Date 10/20/2020 	
)		
UPC Code	Package Size	Serving Size	Serving Size UoM
45900000000	200 gm	10	Grams
	Company Action Delete Cancel UPC Code	Action File Name Delete TP001_DTS.pdf R89012 Cancel UPC Code Package Size 459000000000000000000000000000000000000	ActionFile NameUpload DateDeleteTP001_DTS.pdf10/20/2020CancelVerticeVerticeUPC CodePackage SizeServing Size45900000000200 gm10

Image 24

- Click the Action "View" to view files or deleted a packing PDF/JPEG?JPG on the Additional Package Sizes File pop-up screen. (*Image 24*)
- Save & Continue to proceed to Payment Info.

Add Additional Packaging Info - Payment Info

Add Ac	ditional F	Package Size	es		
Company N	Name A Sample H	leart Check Company			
Product Deta	ails Nutritional Inf	o Packaging Info Pa	ayment Info		
		ils needed to review the ved until you have clicke		ct(s) listed below. Click "Subm	nit" to complete the process.
Action	UPC Code	Package Size	Serving Size	Serving Size UoM	File Name



- All info for additional package sizes entered for certification will display. (Image 25)
- Payment information is not required for additional package sizes.
- Click Submit for Heart-Check food certification of the additional package sizes.

		Home	Change Pa	assword	Product 🔨	Recipe 🗸	Full Name Logout
					Add Product		
Welcome	Full Name				Additional Pa		
As a customer, you o • Add New Produc • Renew Produc • View your Subr	ucts and/or New Additiona	al Sizes			Multiple Dea	ewals	er and quicker.
			Image	26			
To renew an expir	ed product, navigate to	Product > N	Aanage Proo	duct in he	eader navigat	on. (Image	26)
6		Home	Change Pa	assword	Product 🗸	Recipe 🗸	
V						Neepe +	Full Name Logout
Manage F	Products					Neepe +	Full Name Logour
Manage F Products - To be Re	Products newed, Expired & Deactiva	ted				incope v	Full Name Logour
		ted		Name		incope v	Full Name Logour
Products - To be Re	newed, Expired & Deactiva	ted					Full Name Logour
Products - To be Re Category Product	newed, Expired & Deactiva Status All		1				Full Name Logour
Products - To be Re Category	newed, Expired & Deactiva Status		1				
Products - To be Re Category Product	newed, Expired & Deactiva Status All		1	Name			Export To Excel

- All
- To Be Renewed
- Expired
- Deactivated
- c. Name
- Click the Action "Renew" for the desired product to be taken to Edit Product page > Product Details section for that product.



Welcome Test Customer

Company Name A Sample Heart Check Company

We recently made some updates to our web portal to make the product and recipe submission process easier and quicker.

As a customer, you can:

- Add New Products and/or New Additional Sizes
- Renew Products
- · View your Submitted and Certified products and upload updated packaging PDFs for them
- Download <u>Web Portal User Guide</u>

My Certifications

There are some products "In Progress, Submitted" & "Certified" status that require additional information to be submitted for certification review. Click "Edit" on an individual product below in the "Product In Progress" table.

Product Recipe						
Category	Status		Name			
Product	 Certified 		v no			
Search Product	Reset Search Criteria					
		-			🛨 Expo	ort To Excel
Action	Name	Status	UPC Code	Package Size	PLA Start Date	PLA End [
Deactivate Renew	<u>NoChangeToPkg</u>	Certified	NoChangeToPk	12	10/01/2021	11/01/2021
4						۱.
					Fron	n 1 to 1 of 1 entries

Image 28

- The products can also be renewed from the home page.
- Renew link will appear for the products needing renewal on the home page product search screen.
- Click the Action "Renew" for the desired product to be taken to Edit Product page > Product Details section for that product.

Multiple Renewals -

6	Home	Change Password	Product 🔨	Recipe 🗸	Full Name Logout
			Add Product		
Welcome Full Name			Additional Pa	ackage Sizes	
We recently made some updates to our web po	ortal to make	e the product and recip	Manage Proc Multiple Dea		er and _H aicker.
As a customer, you can: • Add New Products and/or New Additional	Sizes		Multiple Ren		
 Renew Products View your Submitted and Certified production Download <u>Web Portal User Guide</u> 	ts and uplo	ad updated packaging	PDFs for then	n	
		Image 29			

• To renew multiple products, navigate to Product > Multiple Renewals in header navigation

Multiple Renewals Confirmation

Ģ		Home	Change Password	Product 🗸	Recipe 🗸	Full Name Logout
Multiple Rene	ewals					
Category	Stat Co	nfirmation			×	
I confirm that the current pack	Reset Search can kaging on file is no fees	duct(s) are subi with an invoice	2 Product(s) for renewal. mitted, someone from ou e for payment of certificati Product until all Product	r team will contact on fees. We	hage Products".	
If there is no packaging on file	Plea		how you would prefer to en press Submit to confi		new Selected	Export To Excel
Name	Status	elect	~		ng Size UoM	PLA Start Date
Test Product	Certifie	Submit	Cancel		15	06/01/2021
Testing Product			004004004 00	0	าสาการ	07/01/2021
4						► From 1 to 2 of 2 entries

Image 30

• Select payment option for certification fees then click **Submit** to confirm.

Multiple Deactivations -



We recently made some updates to our web portal to make the produce and recipe automission process easier and quicker.

As a customer, you can:

- Add New Products and/or New Additional Sizes
- Renew Products
- View your Submitted and Certified products and upload updated packaging PDFs for them
- Download Web Portal User Guide

My Certifications

Image 31

• To deactivate multiple products, navigate to Product > Multiple Deactivations in header navigation.

			ige Password Pr	oduct 🗸 Recipe 🗸	Full Name	<u>Logout</u>
Multiple D	Deactivations					
Category	Status		Name			
Product	 ✓ All 	~	Test			
Search Product	Deset Search Criteria					
Search Product	Reset Search Criteria			Deactivate Selecto	ed 👤 Export To E	Excel
Search Product	Reset Search Criteria	UPC Code	Package Size	Deactivate Selecte Serving Size UoM	ed 👲 Export To E PLA Start Date	Excel
			Package Size			

• Select checkboxes for products to be deactivated.

ő			Home Cha	ange Password	Product 🗸	Recipe 🗸	Full Name	Logout
	tiple Deac s - To be Renewed, y		Deactivate Confir You have selected 2 pro Press Submit to confirm	oduct(s) for deac	tivation.			
Produc		eset Search C		Submit	Det	activate Selecte	ed 👲 Export To	Excel
	Name	Status	UPC Code	Package S	ize Servin	ig Size UoM	PLA Start Date	PLA
	Test	Expired	Testdeep1231	55	Grams	5	04/01/2021	05/(
	<u>Test Product</u>	Certified		450 gm	Grams	5	06/01/2021	07/(
4							From 1 to 2 o	► of 2 entries

• Click Submit to confirm products to be deactivated on the confirmation pop up screen.

20

6				
	Hor	me Change Password Pro	duct 🗸 🛛 Recipe 🗸	Full Name Logo
Edit Product				
Product Details Product Inf	fo Nutritional Info Pa	ckaging Info Payment Info		
Product Name Test Prod Company Name Testing C				
All fields are required				
Has UPC Code?	Reason	UPC Code	Pro	duct Name
Yes v	Select	V 987600000000		est Product
Package Size	Serving Size	Serving Size Uo	M Ty	pe of Product <u>What's this?</u>
500 gm	12	Grams	V B	randed Commodity \sim
Trade Association	Main Product			
Testing Company 🗸 🗸	Select	~		
Save & Continue Sav	ve As Draft Cance			
		Image 34		
1 1				
•	roduct Info.			
& Continue to proceed to Pr	roduct Info.			
& Continue to proceed to Pr	roduct Info. Home	Change Password Product	. ✔ Recipe ∨	Full Name Logout
& Continue to proceed to Pr		Change Password Product	. ✔ Recipe ∨	Full Name Logout
& Continue to proceed to Pr uct – Product Info		Change Password Product	. ✔ Recipe ∨	Eull Name Logout
& Continue to proceed to Pr uct – Product Info dit Product	Home		. ✔ Recipe ∨	Eull Name Logout
w / update information, if n & Continue to proceed to Pr uct – Product Info dit Product roduct Details <u>Product Info</u>	Home		. ▼ Recipe ∨	Eull Name Logout
Continue to proceed to Product – Product Info Continue to proceed to Product Info Continue Test Product Continue Test Product	Home Nutritional Info Packag		. ▼ Recipe ∨	Full Name Logout
Continue to proceed to Product – Product Info	Home Nutritional Info Packag		. ✓ Recipe ∨	Eull Name Logout
Continue to proceed to Prouct – Product Info	Home Nutritional Info Packag	ing Info Payment Info		
Continue to proceed to Product – Product Info	Home Nutritional Info Packag pany FDA/USDA		▼ Recipe ∨ Grocery Store Prim Beverages-Frozen-J	ary Location
Continue to proceed to Product – Product Info Coduct Details Product Info Product Name Test Product Company Name Testing Company Compa	Home Nutritional Info Packag pany FDA/USDA V BISCUIT- B	ing Info Payment Info Products Subcategory Code *	Grocery Store Prim	ary Location uices-XX v

O	m	eq	а	5	

Nuts

Whole Grain

List any Non GRAS Ingredients (Generally Recognized As Safe - Complete disclosure required.)							
Save & Continue	Save As Draft	Cancel					
			Image 35				

🗌 Yes 🔘 No

- Review / update Product Info, if needed.
- Save & Continue to proceed to Nutritional Info.

Company Name A Samp	le Heart Check	Company			
oduct Details Product In	fo Nutritional	I Info Packaging Info	Payment Info		
ving Per Container S	erving Size	Serving Size	(arrount per se	rving)	Calories From Fat
	8	Ounces	(<u>•</u>		0
Fats & Others			Sugars		
Total Fat (g)	0		Total Sugar (g)	•	
Saturated Fat (g)	0	\supset	Added Sugar (g)	0	\supset
Trans Fat (g)	0		Positive Nutrients		
Monounsaturated Fat (g)	0		Vitamin A (%)	•	
Polyunsaturated Fat (g)	0		Vitamin C (%)	•	\supset
Cholesterol (mg)	0		Calcium (%)	•	
Sodium (mg)	0		Iron (%)	•	\supset
			Dietary Fiber (%)	•	\supset
			Vitamin D (%)	0	\supset
			Protein (%)	0	
Additional Nutrition Info		% Daily Value	Other Nutrients		% Daily Value
Total Darbohydrates 0 g)		0		•	•
Fiber (g)				0) (•)
Soluble Fiber 0			High Oleic Oil % of High Oleic / tablespoo	n High Ol	eic Fatty Acids (g)/ RACC
Protein (g)			<u> </u>	0)
Potassium o					



- Review / update Nutritional Info, if needed.
- Save & Continue to proceed to upload the product packaging files.

Edit Product – Packaging Info

Edit Proc	luct	
Company Nam	ne AM Test 1	
Product Details	Product Info Nutritional Info Packaging Info	Payment Info
* Indicates a require	ed field	
UPC	764734346354	Upload Packaging File *
Package Size	3	 You can upload multiple PDF, JPEG & JPG files for each product. Filename should not be more than 150 characters.
Serving Size	1	Max file size allowed: 25 MB.
Serving Size UoM	Cups	Choose File No file chosen Upload File No change from previous packaging
Action	File Name	Upload Date
<u>Delete</u>	Heart Check Recipe Certification.pdf	12/03/2020
		From 1 to 1 of 1 entries
Save & Continu	e Save As Draft Cancel	
	Ir	nage 37

- Packaging Info section displays all previously uploaded packaging files. (*Image 37*)
- Refer to Page 10 to add new packaging files.
- Select No Change from Previous Packaging check box if there is no new or change to the existing packaging file.
- Save & Continue to proceed to Payment Info.

Duplicate File Name

- (Home Change Password Product 🗸	Recipe Vikas Kumar Logout
Add Product Product Details Product Info Nutr	Confirm Submission File with the same name exists, do you want to proceed?	
Product Name Test Company Name My Company	No Yes	
	Image 38	

To upload a file with a duplicate name:

• Click yes or no on the confirmation screen.

lit Proc	duct – Payment Info
it i i oc	Home Change Password <u>Product</u> Recipe ~ O Full Name <u>Logout</u>
	Edit Product
	Product Details Product Info Nutritional Info Packaging Info Payment Info
	Product Name Test Product Company Name Testing Company
•	Indicates a required field
	Your Product Is Ready To Submit
Y	You have provided all of the details needed to review the Test Product product(s) listed below. Click "Submit" to complete the process
Y	Your product(s) will not be reviewed until you have clicked the "Submit" button.
	Once the product or products are submitted, someone from our team will reach out to you to provide an invoice for payment of the certification fees.
F	Please let us know how you would prefer to pay your certification fees: *
	Select V
١	NOTE: We cannot certify your product until all product information and certification fees are received.
	Submit Cancel
	Image 39
Selec	t the payment method for Product Renewal from these options:
0	Invoice System (your company's electronic invoicing system)
0	Mail in a check
0	Request an ACH Form (electronic transfer of funds <u>or</u> wire transfer)

• Submit button will complete the Product submission process and submit your product for renewal.

Sublicensee - Renew Product

• **New Sublicensee Products**: Trade Associations must submit new sublicensee requests directly to their Business Development Manager. Once a sublicensed product is added, the Trade Association will be able to renew and deactivate using this portal.

Ó	Но	me Change Passwor	d Product 🗸	Recipe v 🛛 🛛 🛛	oummy User <u>Logout</u>
Renew Produ	uct				
roducts - To be Renewed, Expired & Deactivated					
Category	Status	SL F	Product Name		
Sublicensee	✓ To Be Renewed	v			
Search Product	Reset Search Criteria				
					Export To Excel
Action	SL Company Name	SL Product Name	SL Product State	us Primary Product	t UPC Code
Deactivate Renew	My SL Company	<u>SL Product 1</u>	Certified	AT Prod 5	
Deactivate Renew	My SL Company	<u>SL Product 2</u>	Certified	AT Prod 5	

From 1 to 2 of 2 entries

Image 40

- Search Category Sublicensee Products needing renewal by:
 - a. Status To Be Renewed and Expired are both eligible for renewal.
 - b. SL Product Name
- The 90-day expiration email notification is the same for Products and Sublicensees. See Product Renewal on page 16 for details.
- Click the Action "Renew" for the desired sublicensee to be taken to Edit Product screen > Company Details section for that product.
- During Sublicensee renewal, you may not edit the details for these sections:
 - a. Company Details
 - b. Product Details
 - c. Product Info
 - d. Nutrition Info
 - e. Packaging Info



Home Change Password Product v Recipe v



Welcome Full Name

We recently made some updates to our web portal to make the product and recipe submission process easier and quicker.

As a customer, you can:

- Add New Products and/or New Additional Sizes
- Renew Products
- View your Submitted and Certified products and upload updated packaging PDFs for them
- Download Web Portal User Guide

My Certifications

There are some products "In Progress, Submitted" & "Certified" status that require additional information to be submitted for certification review. Click "Edit" on an individual product below in the "Product In Progress" table.

Category	Status	SL P	roduct Name		
Sublicensee	~ All	v)			
Search Product	Reset Search Criteria				
Search Floudet	Reset Search Chitena				
				👱 Exp	port To Excel
Action	SL Company Name	SL Product Name	SL Product Status	Primary Product	Dort To Excel
	SL Company Name Testing SL Company	SL Product Name	SL Product Status Certified		

Image 41

- The sublicensee products can also be renewed from the home page.
- Renew link will appear for the sublicensee products needing renewal on the home page product search screen.
- Click the Action "Renew" for the desired product to be taken to Sublicensee Review Product page > Company Details section for that sublicensee product.

	oduct				
Ģ	Ног	ne Change Pass	word Product ~	Recipe	Full Name Logo
Sublicensee -	Review Produ	ıct			
Company Details Produ	ct Details Product Info 1	Nutritional Info Pa	ckaging Info Finish		
	E Product esting SL Company				
* Indicates a required field					
Licenses Remaining 99 out of 100	PLA Start Date 11/01/2020		A End Date 01/2020		
Trade Association *	Primary Product *	SL	Company * Add Nev	V	SL Product Name *
Testing Company	Select	~ T	esting SL Company		SL Product
Package Size *	License Type *	Sta	itus		SL Start Date (MM/DD/YYYY)
500 gm	TAM-BRC	~ (Ir	n Progress		MM/DD/YYYY
SL End Date (MM/DD/YYYY)	P Lic End Date (MN	I/DD/YYYY)			

- Review information.
- Click on Next button to proceed to Product Details.

Sublicensee -		00000				
Company Details Produ	uct Details Product	Info Nutritional Info	Packaging Info Fin	ish		
	SL Product Testing SL Company					
All fields are required						
Has UPC Code?	Reason		UPC Code		Product Name	
Yes	Select	~	234234456456		SL Product	
Package Size	Serving Siz	e	Serving Size UoM		Type of Product What's this?	
500 gm	10		Grams		Branded Commodity	
ck on Next button to p	Cancel			Pecipe	Eull Name I	Locout
view information. ck on Next button to pr to Sublicensee	roceed to Product	Info. Home Chang Product	e Password Product		✓ O Full Name	Logout
view information. ck on Next button to provide the second	roceed to Product	Info. Home Chang Product	e Password Product -		✓ O Full Name	Logout
view information. ck on Next button to provide the second	roceed to Product - Review P duct Details Product SL Product	Info. Home Chang Product et Info Nutritional Info	e Password Product	ish		Logout
view information. ck on Next button to provide the second	roceed to Product - Review P duct Details Product SL Product	Info. Home Chang Product at Info Nutritional Info y FDA/USDA Products	e Password Product -	ish Grocery St	• • • • • • • • • • • • • • • • • • •	
view information. ck on Next button to provide the second	roceed to Product - Review P duct Details Product SL Product Testing SL Company	Info. Home Chang Product at Info Nutritional Info y FDA/USDA Products	e Password Product p Packaging Info Fini Subcategory Code * issants, bagels, tortilla > pompete with or upplement, Meal	Sh Grocery St Beverages	tore Primary Location s-Frozen-Juices-XX bood Category *	

List any Non GRAS Ingredients (Generally Recognized As Safe - Complete disclosure required.)

Next Delete Cancel			
	Next Delete Cance		li

- Review information.
- Click on Next button to proceed to Nutritional Info.

SL Product Name SL Company Name	TAM_SL_Product SI Company				
rving Per Container	Serving Size	Serving Si	ze UoM Calorie: (smount pe		Calories From Fat (amount perserving)
	8	Ounces	v 100		0
Fats & Others		Lab Value	Sugars		
Total Fat (g)	0	0	Total Sugar (g)	0	
Saturated Fat (g)	0	0	Added Sugar (g)	0	
Trans Fat (g)	0	0	Positive Nutrients	;	
Monounsaturated Fat (g)	0	0	Vitamin A (%)	0	
Polyunsaturated Fat (g)	0	0	Vitamin C (%)	0	
Cholesterol (mg)	0	0	Calcium (%)	0	
Sodium (mg)	0	0	Iron (%)	0	
			Dietary Fiber (%)	0	
			Vitamin D (%)	0	
			Protein (%)	0	
Additional Nutrition	Info	% Daily Value	Other Nutrients		% Daily Value
Total Carbohydrates (g)	•	0		0	0
Fiber (g)	0			0	0
Soluble Fiber (g)	•				
Protein (g)	•				
Potassium (mg)	0				
Submit Delete	Cancel				

Review information.

Click on Next button to proceed to Packaging Info.

0		
	Home Chang	e Password Product v Recipe v Password Product v Recipe v Password Product v Recipe v
Sublicons	ee - Review Product	
sublicens	ee - Review Ploquet	
Company Details	Product Details Product Info Nutritional Info	o Packaging Info Finish
SL Product Nam	ne SL Product	
SL Company Na	me Testing SL Company	
Indicates a required	1 field	
SL Product Name	SL Product	Upload Packaging File *
Primary Product	Test Product	 You can upload multiple PDF, 3PEC & 3PG files for each product. Filename should not be more than 150 characters.
UPC	234234456456	Max file size allowed: 25 MB.
Package Size	500 gm	Choose File No file chosen Upload File
Serving Size	10	The change from previous packaging
Serving Size UoM	Grams	
Action	File Name	Upload Date
<u>Delete</u>	Actors-System-Interaction-Diagram.odf	10/19/2020
		From 1 to 1 of 1 entries
Next D	elete	
	Imac	1e 46
aging Info will h	Imag	
aging Info will b	-	
rto Page 10 to a	e displayed for any previously uploaded pa add new packaging files.	
rto Page 10 to a	e displayed for any previously uploaded pa add new packaging files. d to the Finish section.	ckaging files for the Sublicensee product needing renewal. (<i>Ima</i>
rto Page 10 to a	e displayed for any previously uploaded pa add new packaging files. d to the Finish section.	
rto Page 10 to a Nextto proceed	e displayed for any previously uploaded pa add new packaging files. d to the Finish section. Home Change	ckaging files for the Sublicensee product needing renewal. (<i>Ima</i>
rto Page 10 to a Nextto proceed	e displayed for any previously uploaded pa add new packaging files. d to the Finish section.	ckaging files for the Sublicensee product needing renewal. (<i>Ima</i>
rto Page 10 to a Next to proceed	e displayed for any previously uploaded pa add new packaging files. d to the Finish section. Home Change	e Password Product ~ Recipe ~ O Full Name Logout
rto Page 10 to a Next to proceed	e displayed for any previously uploaded pa add new packaging files. d to the Finish section. Home Chang ee - Review Product	e Password Product ~ Recipe ~ O Full Name Logout
rto Page 10 to a Next to proceed with the proceed model of the proceed of the proceed near the proceed model of th	e displayed for any previously uploaded pa add new packaging files. d to the Finish section. Home Change ee - Review Product Product Details Product Info Nutritional Info	e Password Product ~ Recipe ~ O Full Name Logout
rto Page 10 to a Next to proceed	e displayed for any previously uploaded pa add new packaging files. d to the Finish section. Home Change e Change Product Details Product Info Nutritional Info	e Password Product ~ Recipe ~ O Full Name Logout
rto Page 10 to a Next to proceed with the proceed model of the proceed ompany Details SL Product Name	e displayed for any previously uploaded pa add new packaging files. d to the Finish section. Home Change e Change Product Details Product Info Nutritional Info	e Password Product ~ Recipe ~ O Full Name Logout
rto Page 10 to a Next to proceed with the proceed mpany Details SL Product Name	e displayed for any previously uploaded pa add new packaging files. d to the Finish section. Home Change e Change Product Details Product Info Nutritional Info s SL Product me Testing SL Company	e Password Product ~ Recipe ~ O Full Name Logout

You have provided all of the details needed to review the Sublicensee product(s). Click "Submit" to complete the process.

Your product(s) will not be reviewed until you have clicked the "Submit" button.



Image 47

• Click Submit to finish the Heart-Check food certification Sublicensee renewal.

Add Recipe	
F	Home Change Password Product v Recipe v S Full Name Logout
Welcome Full N	ame es to our web portal to make the product and recipe submission process easier and quicker.
As a customer, you can:	es to our web portai to make the product and recipe submission process easier and quicker.
Add New Products and/orRenew Products	New Additional Sizes
 View your Submitted and Download <u>Web Portal Use</u> 	Certified products and upload updated packaging PDFs for them <u>r Guide</u>
My Certifications	
There are some products "In Progress, Su	omitted" & "Certified" status that require additional information to be submitted for certification review. Click "Edit" on an individual product

There are some products "In Progress, Submitted" & "Certified" status that require additional information to be submitted for certification review. Click "Edit" on an individual proceed below in the "Product In Progress" table.

				Product Recipe
	ame	Ν	Status	Category
		~ (~ All	Recipe
			Reset Search Criteria	Search Recipe
Export To Excel				
Subcategory	Guideline	Status	Recipe Name	Action
Recipe - Appetizer (w/o mea	NOS Recipe AP-SP-SLD-SD	Certified	Test Recipe	<u>Deactivate Renew</u>
	8	Image 4		
		eader. (<i>Image 48</i>)	dd Recipe in navigation h	Navigate to Recipe > A
		eader. (<i>Image 48</i>)	dd Recipe in navigation h	Navigate to Recipe > A

Ó	Home Chang	ge Password Product 🗸 Recip	e 🗸 💽 Full Name Logout
Add Recipe			
Recipe Details Recipe Info	Nutritional Info Recipe Attachmer	nts Payment Info	
* Indicates a required field			
Recipe Name *	Number of Servings	Serving Size * (in household measures or by count)	Cost per Serving (US Dollar \$)
C		Carrier Carrier	
Test Recipe	4	lcup	\$4.50
Test Recipe Preparation Time(нн:мм)	4 Cook Time(нн:мм)	Total Time(нн:мм)	\$4.50
			\$4.50



Image 49

- On the Add Recipe screen, add all required information in the section in the order as they appear on screen. Each section is unavailable until the previous section is completed. (*Image 49*)
 - 1. Recipe Details
 - 2. Recipe Info
 - 3. Nutrition Info
 - 4. Recipe Attachments
 - 5. Payment Info
- On Recipe Details screen, enter:

29

- Recipe Name
- Serving Size (in household measures or by count)
- o Description
- Save & Continue to proceed to Recipe Info.
- Save As Draft to complete and submit the form later.

Recipe Name Company Name	Test Recipe Testing Company			
All fields are required Guideline	Subcatego	Dry		
Select	✓ Select	~		
Classification ((Choose all that apply):			
Appetizer	BBQ & Grilling	Beverages	Budget-Friendly	
Dessert	Holiday	International	Kid-friendly	
Quick and Easy	🗌 Main Dish	One Dish Meal	Salads	
Seasonal	Side Dish	Slow Cooker	Soups	
Snacks	Vegetarian	Others		
Ingredients (Note: Please use standard	household measures whenever possible. Ex: 1 or	nion, chopped, approx. 1 cup)		

- Enter Recipe Info for the required fields:
 - Guideline The Guideline selection will prompt different options on subsequent screens.
 - Subcategory The Subcategory selection will prompt different options on subsequent screens.
 - \circ Classification Choose all that apply.
 - \circ Ingredients Use standard household measures whenever possible.
 - Preparation Instructions
- Save & Continue to proceed to Nutritional Info.

Add Recipe - Nutritional Info

Add Recipe	0		
Company Name A Sample	e Heart Check Company		
Recipe Details Recipe Info	Nutritional Info Recipe Attach	ments Payment Info	
Indicates a required field			
Serving Size *	Calories *		
1	0		
Fats & Others		Additional Nutrition Info	
Total Fat (g)	0	Total Carbohydrates (g)	0
Saturated Fat (g) *	0	Dietary Fiber (g)	0
Sodium (mg) *	0	Protein (g)	0
Trans Fat (g) *	0	Sugar	
Monounsaturated Fat (g)	0	Total Sugar (g)	0
Polyunsaturated Fat (g)	0	Added Sugar (g)	0
Cholesterol (mg)	0	Added Sugar (tsp) *	0
Fish Omega-3			
Omega-3 EPA (mg)	0		
Omega-3 DHA (mg)	0		
Save & Continue Sav	ve As Draft Cancel		
		Image 51	

- On Nutritional Infoscreen, enter all required nutritional information for one serving of the recipe. (Image 51)
- These recipe nutrient measurements are required for certification:
 - \circ Calories
 - \circ $\,$ Saturated Fat in grams
 - \circ $\,$ Trans fat in grams
 - Sodium in milligrams
 - Added Sugar in teaspoons
- Do not leave any nutrient fields blank. If there is no value for a particular nutrient, enter zero (0).
- Some Nutritional Info fields are dependent upon selections made on the previous Recipe Info screen and will display based on those choices. (*Image 43*)
 - If NOS Recipe E-Fish-High 03 guideline is selected and Subcategory Recipe Entrée Fish (high in O 3) is selected, then two additional nutritionals are required on Nutrition Info:
 - Omega -3 EPA (mg)
 - Omega -3 DHA (mg)
- Save & Continue to proceed to Recipe Attachments.

dd Recipe - Recipe Attachments					
(Home	Change Password	Product v	Recipe 🗸	Full Name Logo
Add Recipe					
Recipe Details Recipe Info Nu	tritional Info Recipe Attac	chments Paymen	t Info		
Recipe NameTest RecipeCompany NameTesting Company	pany				
* Indicates a required field					
Upload Recipe Image Files *					
 You can upload multiple images for ea Image should be in Horizontal format. Only JPEG, JPG & PNG files are accepta Filename should not be more than 50 of Max file size allowed: 25 MB. 	High-resolution, 300 dpi & 1200 pixels ble.	s wide minimum.			
Choose File No file chosen	Upload File				
Action	File Name		Upload	Date	
Save & Continue Save As	Draft (Cancel)				
Save & Continue Save A	Draft Cancel	Image 52			
o add Recipe Attachments:		Image 52			
o add Recipe Attachments: File name must not exceed 50 cha	racters.	Image 52			
o add Recipe Attachments:	racters. 25 megabytes.		els wide, mir	imum.	
D add Recipe Attachments: File name must not exceed 50 cha File size should not be more than 2 Image should be in horizontal form Only JPG, JPEG and PNG image file	racters. 25 megabytes. nat. High-resolution, 300 s are permitted.		els wide, mir	imum.	
o add Recipe Attachments: File name must not exceed 50 cha File size should not be more than 2 Image should be in horizontal form Only JPG, JPEG and PNG image file Multiple image files are allowed for	racters. 25 megabytes. nat. High-resolution, 300 s are permitted. or upload.		els wide, mir	imum.	
o add Recipe Attachments: File name must not exceed 50 cha File size should not be more than 2 Image should be in horizontal form Only JPG, JPEG and PNG image file Multiple image files are allowed for Click Choose File and select file from	racters. 25 megabytes. nat. High-resolution, 300 s are permitted. or upload.		els wide, mir	imum.	
o add Recipe Attachments: File name must not exceed 50 cha File size should not be more than 2 Image should be in horizontal form Only JPG, JPEG and PNG image file Multiple image files are allowed for	racters. 25 megabytes. nat. High-resolution, 300 s are permitted. or upload. om your device.		els wide, mir	imum.	
o add Recipe Attachments: File name must not exceed 50 cha File size should not be more than 2 Image should be in horizontal forr Only JPG, JPEG and PNG image file Multiple image files are allowed for Click Choose File and select file fro Click Upload File.	racters. 25 megabytes. nat. High-resolution, 300 s are permitted. or upload. om your device.		els wide, mir	imum.	
o add Recipe Attachments: File name must not exceed 50 cha File size should not be more than 2 Image should be in horizontal form Only JPG, JPEG and PNG image file Multiple image files are allowed for Click Choose File and select file fro Click Upload File. Save & Continue to proceed to Par	racters. 25 megabytes. nat. High-resolution, 300 s are permitted. or upload. om your device. yment Info.	0 dpi & 1200 pix	els wide, mir	imum.	Vikas Kumar Lc
o add Recipe Attachments: File name must not exceed 50 cha File size should not be more than 2 Image should be in horizontal form Only JPG, JPEG and PNG image file Multiple image files are allowed for Click Choose File and select file from Click Upload File. Save & Continue to proceed to Par Duplicate File Name	racters. 25 megabytes. nat. High-resolution, 300 s are permitted. or upload. om your device. yment Info. Home Char	0 dpi & 1200 pixe			Vikas Kumar Lo
o add Recipe Attachments: File name must not exceed 50 cha File size should not be more than 2 Image should be in horizontal form Only JPG, JPEG and PNG image file Multiple image files are allowed for Click Choose File and select file fro Click Upload File. Save & Continue to proceed to Par	racters. 25 megabytes. nat. High-resolution, 300 s are permitted. or upload. om your device. yment Info.	0 dpi & 1200 pixe			Vikas Kumar Lo
o add Recipe Attachments: File name must not exceed 50 cha File size should not be more than 2 Image should be in horizontal form Only JPG, JPEG and PNG image file Multiple image files are allowed for Click Choose File and select file from Click Upload File. Save & Continue to proceed to Par Duplicate File Name	racters. 25 megabytes. nat. High-resolution, 300 s are permitted. or upload. om your device. yment Info. Home Char	0 dpi & 1200 pixe	Product 🗸		Vikas Kumar Lo



To upload a file with a duplicate name:

• Click yes or no on the confirmation screen.

Rec	cipe - Payment Info
	Home Change Password Product v Recipe v S Full Name Logou
	Add Recipe
	Recipe Details Recipe Info Nutritional Info Recipe Attachments Payment Info
	Recipe Name Test Recipe Company Name Testing Company
	* Indicates a required field
	Your Recipe Is Ready To Submit
	You have provided all of the details needed to review the Test Recipe recipe. Click "Submit" to complete the process
	Your recipe will not be reviewed until you have clicked the "Submit" button.
	Once the product or products are submitted, someone from our team will reach out to you to provide an invoice for payment of the certification fees.
	Please let us know how you would prefer to pay your certification fees: *
	Select V
	NOTE: We cannot certify your recipe until all recipe information and certification fees are received.
	Submit Cancel
	Image 54

- \circ $\;$ Invoice System (your company's electronic invoicing system)
- $\circ \quad \text{Mail in a check} \\$
- \circ Request an ACH Form (electronic transfer of funds <u>or</u> wire transfer)
- Submit button will complete the Recipe submission process and submit your product to Heart-Check food certification.

ő	Home	Change Password	Product 🗸	Recipe A	Test Customer Logout
Ve recently made some As a customer, you can:	st Customer updates to our web portal to m	ake the product and i	recipe submissio	Manage Recipes Multiple Deactivations	icker.
Renew Products	and/or New Additional Sizes ed and Certified products and up <u>tal User Guide</u>	pload updated packaç	ging PDFs for th	em	
My Certificatio	ons				
nere are some products "In Prog elow in the "Product In Progress Product Recipe	gress, Submitted" & "Certified" status that r s" table.	require additional informatio	n to be submitted for	r certification review. Click "Edit	" on an individual product
ategory	Status	Name Image 55			
	Status pe, navigate to Recipe > Ma Home	Image 55	eader navigatic	on. (Image 55)	3 Test Customer Logout
enew an expired recip	pe, navigate to Recipe > Ma Home	Image 55 mage Recipes in he	eader navigatic		3 Test Customer Logout
enew an expired reci f t t 1anage Rec	pe, navigate to Recipe > Ma Home	Image 55 mage Recipes in he	eader navigatic		Test Customer <u>Logout</u>
enew an expired recipe t t anage Rec b b cipe - To be Renewed,	pe, navigate to Recipe > Ma Home	Image 55 mage Recipes in he	eader navigatic		3 Test Customer Logout
enew an expired reciption of the second seco	pe, navigate to Recipe > Ma Home ipes Expired & Deactivated	Image 55 mage Recipes in he Change Password	eader navigatic		Test Customer Logout
enew an expired recip t t anage Rec cipe - To be Renewed, tegory Recipe	pe, navigate to Recipe > Ma Home ipes Expired & Deactivated Status	Image 55 mage Recipes in he Change Password	eader navigatic		Test Customer Logout
enew an expired recip anage Rec cipe - To be Renewed, tegory Recipe Search Recipe	pe, navigate to Recipe > Ma Home ipes Expired & Deactivated Status	Image 55 mage Recipes in he Change Password	eader navigatio		Export To Excel
enew an expired recipe anage Rec recipe - To be Renewed, ategory Recipe	pe, navigate to Recipe > Ma Home ipes Expired & Deactivated Status All Reset Search Criteria	Image 55 Inage Recipes in he Change Password Nam	eader navigatio	Recipe V	Export To Excel
Action	pe, navigate to Recipe > Ma Home ipes Expired & Deactivated Status All Reset Search Criteria Company Name	Image 55 Image Recipes in he Change Password Nam	eader navigatio	Recipe V	Export To Excel

• Recipes up for renewal may be searched by:

- a. Category is preselected on this screen.
- b. Status:
 - All
 - To Be Renewed
 - Expired
 - Deactivated
- b. Name
- Click the Action "Renew" for the desired product to be taken to Edit Recipe screen > Recipe Details section for that recipe.



Home Change Password Product v Recipe v

Full Name | Logout

Welcome Full Name

We recently made some updates to our web portal to make the product and recipe submission process easier and quicker.

As a customer, you can:

- Add New Products and/or New Additional Sizes
- Renew Products
- View your Submitted and Certified products and upload updated packaging PDFs for them
- Download Web Portal User Guide

My Certifications

There are some products "In Progress, Submitted" & "Certified" status that require additional information to be submitted for certification review. Click "Edit" on an individual product below in the "Product In Progress" table.

Product Recipe				
Category	Status	I	Name	
Recipe	~ All	~		
Search Recipe	Reset Search Criteria			Export To Excel
Action	Recipe Name	Status	Guideline	Subcategory
Describerto		Contified		
Deactivate Renew	Testing Recipe	Certified	NOS Recipe AP-SP-SLD-SD	Recipe - Appetizer (w/o meat)



- The recipes can also be renewed from the home page.
- Renew link will appear for the recipes needing renewal on the home page product search screen.
- Click the Action "Renew" for the desired recipe to be taken to Edit Recipe screen > Recipe Details section for that recipe.

Multiple Renewals -

Home Change Password Product ~ I	Recipe A Full Name Logout
Welcome Full Name	Manage Recipes Multiple Deactivations
We recently made some updates to our web portal to make the product and recipe submission p As a customer, you can: • Add New Products and/or New Additional Sizes • Renew Products • View your Submitted and Certified products and upload updated packaging PDFs for them • Download <u>Web Portal User Guide</u>	Multiple Renewals

• To renew multiple recipes, navigate to Recipe > Multiple Renewals in header navigation.

Multi	p <mark>l</mark> e Renewa	ls			
Category		Status	Name		
Recipe	~	To Be Renewed	×		
Search F	Recipe Reset Sea	arch Criteria			
l confirm	that the current packaging on f	file is not changing. If there are pa	ckaging updates on any of these recipes	. go to "Manage Recipes".	
		3 3 1		, a	
If there is	no packaging on file yet, you ca	an add them individually under "M			
If there is	no packaging on file yet, you ca			Renew Selected	Export To Excel
If there is	no packaging on file yet, you ca Company Name			Renew Selected	Export To Excel
If there is		an add them individually under "N	lanage Recipes".	Renew Selected	
If there is	Company Name	an add them individually under "M Recipe Name	lanage Recipes". RLA Start Dat	Renew Selected e RLA End Date	Status
	Company Name User Guide test	an add them individually under "M Recipe Name <u>Test</u>	fanage Recipes". RLA Start Dat 06/01/2021	Renew Selected RLA End Date 07/01/2021	Status Certified

Multiple Deactivations -

6	Home	Product ~	Recipe 🔿	AHA Dashboard	0	Logost
			Add Recipe		-	
Welcome Test Customer			Manage Rec	cipes		
Company Name A Sample Heart Check Comp	any		Multiple Der Multiple Rer	newals		

We recently made some updates to our web portal to make the product and recipe submission process easier and quicker.

As a customer, you can:

- · Add New Products and/or New Additional Sizes
- Renew Products
- · View your Submitted and Certified products and upload updated packaging PDFs for them
- Download Web Portal User Guide

My Certifications

There are some products 'In Progress, Submitted' & 'Certified' status that require additional information to be submitted for certification review. Click 'Edit' on an individual product below in the 'Product In Progress' table.

Product Recipe

Category		Status		Name			
Product	~	All	~				
Search Product	Reset Sea	arch Criteria				Exp	ort To Excel
Action	Name				Status	UPC Code	Package
Deactivate Renew	Half Pi	nt - Canned Aphids			Certified	11111111330	807
			Imag	e 60			

• To deactivate multiple recipes, navigate to Recipe > Multiple Deactivations in header navigation.

Ø		Home Ch	ange Password 🛛 Product 🗸	Recipe 🗸	Full Name Logo
Mult	iple Deactiv	ations			
Recipe - T	o be Renewed, Expired				
Category		Status	Name		
Recipe	v)	All	×) (
Search	Recipe Reset Se	earch Criteria	_		
			D	eactivate Selected	Export To Excel
	Company Name	Recipe Name	RLA Start Date	RLA End Date	Status
	User Guide	Test	06/01/2021	07/01/2021	Certified
	User Guide	Test recipe	06/01/2021	07/01/2021	Certified
	ckboxes for recipes to		mage 61		From 1 to 2 of 2 entr
	ckboxes for recipes to	o be deactivated.		Design	
	ckboxes for recipes to	o be deactivated.	mage 61	Recipe 🗸	From 1 to 2 of 2 entr
elect che		o be deactivated. Home Cha	ange Password Product 🗸	Recipe V	
elect cher f Multi	ckboxes for recipes to	o be deactivated. Home Cha	ange Password Product v	Recipe V	
elect cher f Multi	iple Deactiv	o be deactivated. Home Cha Ati Deactivate Confir	ange Password Product v mation ipe(s) for deactivation.	Recipe V	
elect cher Tulti Recipe - T	iple Deactiv	be deactivated. Home Cha Ati Deactivate Confir You have selected 2 rec Press Submit to confirm	ange Password Product V mation ipe(s) for deactivation. n.	Recipe V	
elect cher Multi Recipe - T Category Recipe	iple Deactiv	Home Char Home Char Ati Deactivate Confir You have selected 2 rec Press Submit to confirm Sta Cancel	ange Password Product v mation ipe(s) for deactivation.	Recipe V	
elect cher Multi Recipe - T Category	iple Deactiv	Home Char Home Char Ati Deactivate Confir You have selected 2 rec Press Submit to confirm Sta Cancel	ange Password Product V mation ipe(s) for deactivation. n.		
elect cher Multi Recipe - T Category Recipe	iple Deactiv	Home Char Home Char Ati Deactivate Confir You have selected 2 rec Press Submit to confirm Sta Cancel	ange Password Product V mation ipe(s) for deactivation. n.		Full Name Logo
elect cher Multi Recipe - T Category Recipe Search	iple Deactiv To be Renewed, Expired	be deactivated. Home Cha Deactivate Confir You have selected 2 rec Press Submit to confirm Sta Cancel	ange Password Product V mation ipe(s) for deactivation. n. Submit	eactivate Selected	Full Name Logo

Image 62

• Click Submit to confirm recipes to be deactivated on the confirmation screen.

Renew Recipe - Edit Recipe

- Review / update information, if needed.
- Save & Continue to proceed to Recipe Info.

đ				
Ő	Home	Change Password Product	t v <u>Recipe v</u>	Full Name Logout
Edit Recipe				
Recipe Details Recipe In	fo Nutritional Info Recipe A —	ttachments Payment Info		
Recipe NameTest RCompany NameTest in				
All fields are required				
Guideline	Subcatego	pry		
NOS Recipe AP-SP-SLD-SD	V Recipe - A	ppetizer (w / meat) 🗸 🗸		
Classification (Choose	all that apply):			
Appetizer	BBQ & Grilling	Beverages	Budget-Friendly	
Dessert	Holiday	International	Kid-friendly	
Quick and Easy	🗌 Main Dish	One Dish Meal	Salads	
Seasonal	Side Dish	Slow Cooker	Soups	
Snacks	Vegetarian	Others		
Ingredients				
(Note: Please use standard househ	old measures whenever possible. Ex: 1 on	ion, chopped, approx. 1 cup)		
Test Ingredients				
Preparation Instructions				
Test Preparation Instructions	i			
Save & Continue	Save As Draft Cancel			
		Image 63		

- Review / update information, if needed.
- Save & Continue to proceed to Nutritional Info.

Company Name A Sample	Heart Check Co	mpany		
Recipe Details Recipe Info	Nutritional Info	Recipe Attachments	Payment Info	
ndicates a required field				
erving Size *	Calories *			
1 Slice	100			
Fats & Others			Additional Nutrition Info	
Total Fat (g)	0		Total Carbohydrates (g)	0
Saturated Fat (g) *	0		Dietary Fiber (g)	0
Sodium (mg) *	0		Protein (g)	0
Trans Fat (g) *	0		Sugar	
Monounsaturated Fat (g)	0		Total Sugar (g)	0
Polyunsaturated Fat (g)	0		Added Sugar (g)	0
Cholesterol (mg)	0		Added Sugar (tsp) *	0
Fish Omega-3				
Omega-3 EPA (mg)	0			
Omega-3 DHA (mg)	0			
Save & Continue Sav	e As Draft	Cancel		

• Review / update information, if needed.

Save & Continue to proceed to Recipe Attachments.

	Home (Change Password	Product 🗸 🛛 Reci		Full Name <u>Logout</u>
Edit Recipe					
Recipe Details Recip	pe Info Nutritional Info Recipe Attac	hments Payment	Info		
Recipe Name To Company Name To	est Recipe esting Company				
Upload Recipe Image • You can upload multiple • Image should be in Hori • Only JPEG, JPG & PNG fi • Filename should not be • Max file size allowed: 25 Choose File No file cho	e images for each recipe. zontal format. High-resolution, 300 dpi & 1200 pixels iles are acceptable. more than 50 characters. MB.	s wide minimum.			
Action	File Name		Upload [ate	
Delete	Sublicensee.png		10/20/202	0	
Save & Continue	Save As Draft Cancel				From 1 to 1 of 1 entries
		Image 65			
view / update inform /e & Continue to prov	ation, if needed. ceed to Payment Info.				
-					
cate File Name					Vikas Kumar <u>Logo</u>
	Home Cha	nge Password	roduct 🗸 🛛 Recip		1
	Confirm Submiss	ion			

5

To upload a file with a duplicate name:

• Click yes or no on the confirmation screen.

Home Change Password Product v <u>Recipe v</u>	ull Name <u>Logout</u>
Edit Recipe	
Recipe Details Recipe Info Nutritional Info Recipe Attachments Payment Info	
Recipe Name Test Recipe Company Name Testing Company	
* Indicates a required field	
Your Recipe Is Ready To Submit	
You have provided all of the details needed to review the Test Recipe recipe. Click "Submit" to complete the process	
Your recipe will not be reviewed until you have clicked the "Submit" button.	
Once the product or products are submitted, someone from our team will reach out to you to provide an invoice for paymer certification fees.	nt of the
Please let us know how you would prefer to pay your certification fees: *	
Select V	
NOTE: We cannot certify your recipe until all recipe information and certification fees are received.	
Submit Cancel	
Image 67	
Select the payment method for Recipe Renewal from these options:	
 Invoice System (Your company's electronic invoicing system) 	
 Mail in a check 	

- Request an ACH Form (Electronic transfer of funds <u>or</u> wire transfer)
 Submit button will complete the Recipe Renewal submission process and submit your recipe for renewal.

