COLYAR CONSULTING GROUP, INC.

Child Nutrition Programs

Child and Adult Care Food Program

User Manual

Nebraska Department of Education
Nutrition Services

For Sponsor Users

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Introduction

Welcome to the Nebraska Department of Education Nutrition Services user manual for the School Nutrition Programs module. This web-based software solution provides administrators, state users, and Sponsors with efficient and immediate access to applications, claims, and related nutrition program functions.

Web Site Benefits and Features

The CNP system is a user-friendly web application that allows authorized state agency personnel and Sponsors to submit and approve application, claims, and advance requests via the Internet. Key system features include:

- A software system that manages information regarding Sponsors, applications, claims, and reports.

- A single integrated database which serves all child nutrition programs.

- The ability to save partially completed forms on-line, allowing the user to complete the process at a later time.

- Individual User IDs and passwords for secure login to program functions and accurate tracking of user behavior.

- A robust security module that streamlines security setting controls by enabling administrators to easily assign users to numerous pre-defined groups and eliminating the need to manually set each user's security access.

User Manual

This user manual is intended for use by authorized state users that administer the Child and Adult Care Food Program. It is designed to provide a general understanding of how to use the system in an effective and efficient manner. This manual will provide:

- A general explanation of each feature available.

- Screen examples of web site pages and forms.

- Step-by-step instructions for utilizing the web site features.

- Tips and notes to enhance your understanding of the system.

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Getting Started

Before you can begin using the system, you must be assigned a user ID and password from the Child Nutrition Program. Once this setup is complete, you may use the Internet and your assigned user ID and password to access and log onto the CNP web site.

Accessing the Web Site

You can access the system from any computer connected to the Internet by opening your Internet browser and entering the following URL in the browser's address line:
https://nutrition.education.ne.gov/splash.aspx

TIP: You can add this URL to your browser's FAVORITES list or create a shortcut to the web site on your desktop for quicker access to the site. Refer to your browser or operating system help files for further information.

Figure 1: System Home Page

About the Home Page

The Home Page consists of three major sections:

- Bulletin Board.

- Log on.

- Links.

The bulletin board is managed by Child Nutrition Program and provides general information. It is important to remember that the bulletin board on the home page is viewable by the public.

The log on section is where authorized users enter their User ID and password. The links section provides access to websites and additional information.

Logging On

To log on

1. Access the system by typing the URL into the address line of your web browser.

2. Enter your assigned **User ID**.

3. Enter your **Password**.

4. Select **Log On**.

Note: If you do not have a User ID and Password, contact the Child Nutrition Program.

TIP: The Password is case-sensitive, so be sure to use upper and lower-case letters, numeric and special character.

To change your password

If this is your first time logging on, the system will automatically require you to change your password.

1. Select a new password and enter it into the box provided.

2. Re-enter your new password for confirmation.

3. Select **Save** to continue to the CNP Programs page.

Content Overview

Once you are logged in and have selected a Sponsor, the top portion of the CNP application contains key elements that provide basic information about your location within the system and the selected Sponsor.

Figure 2: CNP Content Overview

Item	Description
Program Name	The selected program name appears in the gray area at the top of the page.
Menu Items	Menu items display on the blue menu bar at the top of the page. Selecting a menu item will take you to its menu page. Users may not have access to all menu items. If you are unable to select a particular menu item, you do not have the necessary security rights. Contact the Child Nutrition Program for assistance.
Navigation/Breadcrumb Trail	The navigation, or breadcrumb trail, identifies your location within the web site. Selecting a specific portion of the trail will take you back to that particular screen. Note: To ensure that the correct screen and data is displayed, please use the navigation/breadcrumb trail or buttons at the bottom of the screen to navigate throughout the system; do not use your browser's Back and Forward button
Program Year	The selected program year displays on the right beneath the menu bar. Upon logging in, the system defaults to the most current active program year.
Information Box	The information box displays general information regarding the Sponsor/Site.
Log Out	The logout button displays in the menu bar. It is recommended to select **Log Out** to properly exit the system.

Note: For security reasons, the system will automatically log you out after twenty (20) minutes of inactivity.

Screen Options

Data entry screens in the system offer the user some or all of the following options: **VIEW, MODIFY, DELETE, and INTERNAL USE ONLY**. The Screen Options area is located on the top right side of the screen, directly beneath the colored bar.

Figure 3: Screen Options - example

The following table describes each of the possible screen options:

Item	Description
VIEW	Presents the screen information in 'view-only' mode. In this mode, the user cannot modify any data.
MODIFY	Presents the screen in 'modify' mode. In this mode, the user can modify field data and save the data after pressing the save button at the bottom of the screen.
DELETE	Deletes the current record displayed on the screen. The user will be presented with a confirmation screen to validate that they intend to delete the record.
INTERNAL USE ONLY	This option is only available to authorized State users only. This is available for screens that have an Internal Use Only section, which is typically at the bottom portion of the screen. Selecting this option will result in the fields in the Internal Use Only section to become editable.

Programs Page

Once you successfully log on, the CNP Programs page is displayed. Actual access to specific modules is based on the user's security rights.

> **TIP:** The Accounting, Maintenance and Configuration, and Security tiles are always gray because these are administrative modules that are available to only authorized State users. Sponsors will not have access to these modules. Only select authorized State users will have access to these modules.

Figure 4: Programs Page

Selecting this button…	Provides…
School Nutrition Programs	Access to the School Nutrition Programs home page
Accounting	Access to the Accounting Module home page
Child and Adult Care Food Program	Access to the Child and Adult Care Food Program home page
Maintenance and Configuration	Access to the Maintenance and Configuration module home page
Summer Food Service Program	Access to the Summer Food Service Program home page
Security	Access to the Security Module home page

TIP: To ensure that the correct screen and data is displayed, please use the navigation/breadcrumb trail or buttons at the bottom of the screen to navigate throughout the system; **do not** use your browser's Back and Forward button.

Child and Adult Care Food Program Home Page

The Child and Adult Care Food Program (CACFP) home page contains the message board used by state administrators to post and maintain CACFP-related messages. Messages may contain important news regarding the submission due dates, upcoming training, legislative changes, or any other CACFP-specific information.

To access the Child and Adult Care Food Program home page

1. Log on to the CNP web site.

2. On the Programs screen, select **Child and Adult Care Food Program**.

> **Note:** If a user only has access to the Child and Adult Care Food Program module, the Programs screen is not displayed.

3. The Child and Adult Care Food Program home page displays.

> **Note:** State administrators maintain the message boards for all modules. If you would like a message posted on the Child and Adult Care Food Program home page, please contact the Child Nutrition Program. Please note that messages are visible to both internal and external users.

Figure 5: Child and Adult Care Food Program Home Page

Child and Adult Care Food Program menu options

From the Child and Adult Care Food Program home page, you can select a menu item from the blue menu bar at the top of the page. The Child and Adult Care Food Program menu bar contains only menu items specific to the Child and Adult Care Food Program. The table below describes the features available for each menu option, which the remainder of this manual will discuss in detail.

Please note: individual users may have varying menu options due to the user's security configuration.

Menu Item	Menu Features
Applications	Access to overall application-related items including: ▪ Sponsor Profile (State users only). ▪ Application Packet (inc. Sponsor and Site/Provider applications as well as supporting submissions). ▪ Advance Requests. ▪ Download Forms.
Claims	▪ Access to CACFP claim entry screens and Sponsor-specific payment history.
Reports	Access to a variety of standard CACFP reports
Security	Access to an individual user's security-related items including: ▪ My Account (authenticated user changing their password).

	▪ User Manager.
Search	Access to the CACFP Sponsor Search screen.

Error Processing

All information entered and saved on the system is verified to ensure it conforms to data entry guidelines and system rules. The site performs two types of checks on information entered: Input Edits and Business Rule Edits.

Input Edits

Whenever you save information or proceed to a new screen, the site checks for input errors. These errors may include entry errors such as an invalid data entry (such as entering a 4-digit Zip Code), or a non-logical entry (e.g., entering a greater number of eligible than enrolled children).

If a form contains an input error and the user selects **Save**, the screen either displays the error code and description in red at the top of the page (and the error code is a letter) or displays a message next to the field in error. Input errors <u>must be corrected</u> before you can proceed. The system will <u>not</u> save data entered on a screen that contains an input error. The user must correct the input errors and select **Save** again.

Figure 6: Examples of an Input Error (Partial Screen)

Business Rule Edits

Business rule edits are used to ensure that entered data on a form conforms to state-defined guidelines/requirements and federal regulation. Once the user initiates a save, CNP will perform business rule edit checks <u>after</u> all input errors have been corrected and display a confirmation screen stating that data entered has been saved and identifies whether errors exist.

The user may correct business rule errors immediately or at another time. The entered data will not be lost. The errors will display at the top of the screen with an error code (usually 4-5 digits) and error description. Business rule edits <u>do not</u> prohibit the system from saving the data entered on the screen.

Figure 7: Example of a Business Rule Error (Partial Screen)

In addition, business rule edits have an error severity that indicates whether an error is considered an Error or a Warning. Errors appear in red and must be corrected before the form can be submitted. Warnings appear in blue and indicate an "out of the ordinary" data value. Warning errors do not need to be corrected prior to form submission.

Code	Warning Description
001	The Application Packet is not considered complete until the prior year's Food Safety Inspection Report has been submitted.

Figure 8: Example of a Warning Error

Note: State administrators maintain the business rule error messages. If you think an error message is incorrect or unclear, please contact the Child Nutrition Program.

Selecting a Program Year

Information for Sponsors and sites is displayed based on the selected program year. Upon logging on to the system, the "active" program year is the default selection and displays in the top-right corner in the green bar. In order to view information from a prior year, you will need to change the program year.

Note: A Sponsor will be unable to select a new year if they have not been granted the security right.

To select a program year

1. Select **Year** on the blue menu bar at the top of the page. The Year Select screen displays.

2. Select the year.

   Note: The selected year is indicated by **Selected**.

3. Use the menu bar to return to your task in the program.

   TIP: The ability to view and/or modify a program year is controlled by the State's system administrator. It is important to note that a program year may be set as "view only" to the Sponsors and "modify" to authorized State users.

Year Select

Select Year	
2012 - 2013	< Selected
2011 - 2012	
2010 - 2011	
2009 - 2010	

Figure 9: Year Select screen

Sponsor Search

For most CACFP functions, you must search for and select a Sponsor using the Sponsor Search function before beginning any task. When the Sponsor Search screen displays, you can search for the Sponsor using all or part of the Sponsor's Agreement Number, Name, or any other combination of parameters provided on this screen.

To search for a Sponsor

1. On the menu bar, select **Search**. Then select **Sponsor Search**. [If the Sponsor Search screen is already displayed, begin at Step 2.] The Sponsor Search screen displays.

2. Enter search parameters (see table for additional information on using the search parameters).

3. Select **Search.**

4. Select the Sponsor you wish to access.

> **TIP:** The Sponsors List displays based upon the search criteria entered. If no selections were made, the list displays all available Sponsors with the designated status (default is "Active"). To display all Sponsors, leave all search parameters blank and select **Search.**

CACFP Sponsor Search

Search for Sponsors

Agreement Number:	Packet Status:
Sponsor Name:	Field Service Rep:
FEIN:	Packet Assigned To:
County:	
	Program Status:
Sponsor Status: Active	Program: Both
☐ Search all available Programs	

Search

Sponsors					Found:
Agreement Number	Sponsor Name	Application Packet Status	Submitted for Approval	Approval Date	Packet Assigned To

Add New Sponsor

Figure 10: Sponsor Search screen

The search parameters follow a specific set of rules. These are described in the following table.

If the type of search is identified as "includes", the system will search for any Sponsor that includes the parameter in any portion of the selected field. For example, if the user entered "386" in the Agreement Number parameter, the system will retrieve Sponsors with Agreement Numbers of "00386" and "01386".

If the type of search is "exact match", the system will search only for any Sponsor that exactly matches the parameter. For example, if the user selected "Adams" in the County parameter, the system will retrieve all Sponsors associated with the county of Adams.

Parameter	Type of Search	Search Features
Agreement Number	"includes"	▪ If in combination with the Sponsor Name, the Agreement Number takes precedence ▪ If in combination with any other parameter, all parameters are used to perform the search
Sponsor Name	"includes"	▪ If in combination with the Agreement Number, the Agreement Number takes precedence; this parameter is ignored ▪ If in combination with any other parameter, all parameters are used to perform the search
FEIN	"includes"	▪ If in combination with the Agreement Number, the search is performed using both the Agreement Number and this parameter ▪ If in combination with any other parameter, all parameters are used to perform the search
County **Packet Status** **Field Service Rep** **Packet Assigned To** **Program Status** **Program**	"exact match"	▪ If in combination with the Agreement Number, the search is performed using both the Agreement Number and this parameter ▪ If in combination with any other parameter, all parameters are used to perform the search
Sponsor Status	"exact match"	▪ Required; defaults to "Active" ▪ If in combination with any other parameter, all parameters are used to perform the search

If the "Search all available Programs" checkbox is checked, the results display changes in appearance. The system will ignore all search criteria except for the Agreement Number and Sponsor Status. If the Contracting Name is entered, and no Agreement Number is entered, the system will ignore all search criteria except for Sponsor Name. If no parameters are entered, the system will retrieve all Sponsors in all programs.

Figure 11: Sponsor Search screen – "Search all available Programs" example

To add a new Sponsor

1. On the menu bar, select **Search**. The Sponsor Search screen displays.

2. Perform a search to ensure that the Sponsor does not already exist in the system.

3. Select **Add New Sponsor** at the bottom of the screen results section. The Sponsor Profile screen displays.

4. Refer to the *Sponsor Profile* section.

Site Search

You can also search for and select a Site through the Site Search function on the Search menu.

Note: The Site Search function applies to Center sites only.

TIP: Sites only display if they are associated with a Sponsor to which you have access.

You can search for the site using all or part of the Site ID, Site Name, License Number, or Street Address. At least one search criteria must be entered. The search results display in the Site List below the search criteria.

To search for a site

1. On the menu bar, select **Search**.

2. Select **Site Search.**

3. Enter all or a portion of the Site ID, Site Name, License #, or Street Address in the respective text box (es).

4. Select **Search.**

5. Select the desired Site.

CACFP Site Search

Search for Sites

Site ID:	
Site Name:	
License #:	
Street Address:	
City:	
State:	Zip Code:

Search

Figure 12: Site Search Page

Parameter	Type of Search	Search Features
Site ID	"includes"	▪ If in combination with the Site Name, the Site ID takes precedence ▪ If in combination with any other parameter, all parameters are used to perform the search
Site Name	"includes"	▪ If in combination with the Site ID, the Site ID takes precedence; this parameter is ignored ▪ If in combination with any other parameter, all parameters are used to perform the search
License # **Street Address** **City** **State** **Zip Code**	"includes"	▪ If in combination with the Site ID, the search is performed using both the Site ID and this parameter ▪ If in combination with any other parameter, all parameters are used to perform the search

3

Applications

Now that you know how to access and log on to the system, the remainder of the manual will explore the functions of the Child and Adult Care Food Program module. Let's first look at the Applications component, where users manage yearly enrollment of Sponsors and sites and submit/review Advance Requests.

About the Program Year Enrollment Process

In order to participate in the Child and Adult Care Food Program, Sponsors must submit an Application Packet to the State for review and approval. Before beginning the Application Packet, Sponsors must select the "Add" action on the Application Packet screen. The user is then transferred to a blank CACFP Sponsor application screen. A new Application Packet must be submitted and approved for each program year. Once the Application Packet is approved, monthly claims for reimbursement may be submitted.

		Latest	
			Packet Assigned To: unassigned
Action	**Form Name**	**Version**	**Status**
Add	Sponsor Application		Not Started

< Back

Figure 13: Enrolling in a New Program Year

Submitting an Application Packet

The Sponsor can submit the Centers or Day Care Home Application Packet to the State once the application is deemed complete by the system. In order to be able to submit an Application Packet, the packet must contain:

- A completed Sponsor Application with no errors.

- At least one completed CACFP Site/Provider Application with no errors.

- A completed Budget Detail with no errors.

- A completed Staff Profile with no errors.

- All items in the Checklist are identified as submitted to Child Nutrition Program.

Once the Application Packet has been submitted to the State for approval, the packet history section of the Application Packet screen will display the event and the packet status changes to **Submitted for Approval.**

Packet History		
Event	Event Date/Time	User
The application packet was submitted.	7/17/2012 8:54:23 AM	Developer
Alliance Public Schools was enrolled in 2013.	7/11/2012 2:21:59 PM	sfspsponsor

Figure 14: Packet History (sub-section of the Application Packet screen)

Applications Menu

The Applications menu is the starting point for all tasks related to the annual Child and Adult Care Food Program enrollment process. Menu items are based on security levels.

To access the Applications Menu

1. On the blue menu bar, select **Applications.**

2. Select an application item to access that application function.

The following figure displays the complete list of Applications menu items for authorized state users. It is important to note that Sponsors have significantly fewer Applications menu items.

Item	Description
Sponsor Profile	CACFP Sponsor Profile Information
Application Packet - Center	Center Application Packet
Application Packet - FDCH Sponsor	FDCH Sponsor Application
Advance Request	FDCH Sponsor's request for Cash Advance(s) for the current year
Advance Requests Manager	Manage requested Advance(s) for the current year
Download Forms	Forms for Downloading - CACFP

Figure 15: CACFP Applications Menu screen (State view)

Sponsor Profile Menu

The Sponsor Profile Menu allows authorized State users to access the Sponsor Profile, Site Manager, Batch Hold, and Payment Hold functions.

To access the Sponsor Profile Menu

1. On the blue menu bar, select **Applications**.

2. From the Applications menu, select **Sponsor Profile**. If a Sponsor has already been selected, the Sponsor Profile Menu screen displays.
   If no Sponsor has been selected, use the Sponsor Search feature to search for and select a Sponsor.

Item	Description
Sponsor Profile	Specific information for the Sponsor.
Site Manager	Site List and Site Options for the Sponsor.
Batch Holds	Batch Hold Options for Enrolled Programs.
Payment Holds	Payment Hold Options for Enrolled Programs.

Figure 16: Sponsor Profile Menu screen

The following table describes the features available from the Sponsor Profile screen.

Item	Description
Sponsor Profile	Provides specific information for the Sponsor, including identification numbers, and program participation.
Site Manager	Provides access to the list of sites associated with the Sponsor and the ability to access a specific Site Profile
Batch Holds	Provides the ability to place a payment hold on all selected Sponsor Child and Adult Care Food Program payments until the hold is removed
Payment Holds	Provides the ability to place a payment hold on a Contract Entity's Child and Adult Care Food Program payments for a <u>specific</u> month/year; the month/year on hold will not be processed for payments; however, all other months/years not on hold will be included in payment processing

TIP: It is more common to place a Batch Hold on a Sponsor rather than a Payment Hold. The Batch Hold will ensure no payments are issued; the Payment Hold will only ensure that claim payments for a specific month/year are not issued.

Sponsor Profile

The Sponsor Profile provides general information on the Sponsor. The Sponsor Profile data is NOT year-specific. It provides general attribute information regarding the Sponsor such as name, Agreement Number, type of agency, and county.

All Sponsors must be initially registered through the Sponsor Profile screen before an Application Packet can be completed and any additional data can be added to the system. Furthermore, a Sponsor cannot be assigned a User ID until the entity is defined in the system via the Sponsor Profile screen.

Note: State users also use the Sponsor Profile to specify whether the *Sponsor will report Sponsor level* or *Site level* claims. Once these preferences are set, they are in effect starting the following claim month. System functionality will not honor a change to claiming status (Sponsor reporting vs. Site reporting) within a claim month.

To view or modify a Sponsor profile

1. On the Applications menu, select **Sponsor Profile.**

2. Search for and select a Sponsor using the Sponsor Search (if necessary).

3. Once a Sponsor has been selected, select **Sponsor Profile.**

4. Modify any desired information within the profile.

5. Select **Save**. If no errors exist, a confirmation screen displays.

6. Select **Edit** to return to the Sponsor Profile screen you just modified.
    -OR-
    Select **Finish** to return to the Sponsor Profile Menu.

Sponsor Profile

Sponsor Information

Agreement Number:	070006
Sponsor Name:	Alliance Public Schools
Type of Agency:	Public School
FEIN:	476001263
Region:	
County:	Box Butte (007)
Congressional District:	
DUNS Number:	
Address Book Number:	
Export Voucher Text File:	○ Yes ◉ No
Communication Preference:	◉ Electronic ○ Paper

Program Participation

Select the program(s) available to the Sponsor:

☐ School Nutrition Programs (SNP)   ☑ Summer Food Service Program (SFSP)

☑ Child and Adult Care Food Program (CACFP)

School Nutrition Program

Claims are reported by:	○ Sponsor ◉ Site
One-Time Exception Used Date:	
Agreement Type:	Public School
Payment Suffix:	
Direct Deposit:	◉ Yes ○ No
Field Service Representative:	
SNP Specialist:	
SNP Consultant:	

Figure 17: Sponsor Profile screen (part 1)

Summary Food Service Program

Claims are reported by: ○ Sponsor ● Site

One-Time Exception Used Date: 07/03/2012

Agreement Type: School Food Authority (SFA) ▼

Payment Suffix: [ ]

Direct Deposit: ● Yes ○ No

Field Service Representative: Orender, Joan ▼

SFSP Specialist: Shepherd, Eva ▼

SFSP Consultant: [▼]

Child and Adult Care Food Program (CACFP) - Centers

☑ Participating in the Centers Program

Claims are reported by: ○ Sponsor ● Site

One-Time Exception Used Date: 07/20/2012

Packet Type: Sponsor of Affiliated & Unaffiliated Sites ▼

Agreement Type: For Profit ▼

Payment Suffix: [ ]

Direct Deposit: ○ Yes ● No

Field Service Representative: Bailey, Jane ▼

CACFP Specialist: Smith, Lisa ▼

CACFP Consultant: [▼]

Child and Adult Care Food Program (CACFP) - Family Day Care Home (FDCH)

☑ Participating in the Family Day Care Home Program

Claims are reported by: ○ Sponsor ● Provider

One-Time Exception Used Date:

Agreement Type: For Profit ▼

Payment Suffix: [ ]

Direct Deposit: ○ Yes ● No

Field Service Representative: Bailey, Jane ▼

DCH Specialist: Smith, Lisa ▼

DCH Consultant: [▼]

Status

Sponsor Status: Active ▼

Modified By: sfspstate on: 7/18/2012 8:30:58 AM

[Save] [Cancel]

Figure 18: Sponsor Profile screen (part 2)

To delete a Sponsor profile

1. On the Applications menu, select **Sponsor Profile.**

2. Search for and select a Sponsor using the Sponsor Search (if necessary).

3. Once a Sponsor has been selected, select **Sponsor Profile.**

4. On the Edit menu, select **DELETE**. A warning displays.

> **WARNING:** Once the profile has been deleted, it is permanently removed from the system and cannot be restored. You will not be able to access any data regarding the Sponsor within the system. **Use caution before deleting a profile.**

5. Select **Delete**. A confirmation screen displays.

6. Select **Finish** to return to the Sponsor Profile menu.

> **TIP:** To retain history on a Sponsor, change their Status to Inactive instead of deleting the profile.

Site Manager

The Site Manager enables you to view, modify, add, delete, and change the status of a Sponsor's Center site.

> **Note**: The Site Manager applies only to Center Sites. FDCH Providers are not contained in the Site Manager.

To access Site Manager

1. On the blue menu bar, select **Applications**.

2. From the Applications menu, select **Sponsor Profile.** If a Sponsor has already been selected, the Sponsor Profile Menu screen displays.
   If no Sponsor has been selected, use the Sponsor Search to search for and select a Sponsor.

3. On the menu, select **Site Manager**. The Sponsor Site Manager screen displays.

To create a new Sponsor site

1. On the menu bar, select **Applications**.

2. Select **Sponsor Profile**. The Sponsor Profile menu displays.

3. Select **Site Manager**. The Sponsor Site Manager menu displays.

4. Select **Create New Site**. A blank Site Profile screen displays.

5. Enter data. The system allows the Child Nutrition Program to enter the Site ID.   Site IDs must be unique within a Sponsor. They are not unique across the system.

6. Select the check boxes for the programs in which the site participates.

7. Select **Save** to save the information on the site. The Sponsor Site Manager re-displays

with the new site added.

Figure 19: Site Profile screen

To view or modify a Site Profile

1. On the Applications menu, select **Sponsor Profile.** If a Sponsor has already been selected, the Sponsor Profile Menu screen displays.
If no Sponsor has been selected, use the Sponsor Search to search for and select a Sponsor.

2. Once a Sponsor has been selected, select **Site Manager.** The Sponsor Site Manager displays.

3. Select the site you wish to view or modify. The Site Profile screen displays.

4. Modify any desired information within the profile.

5. Select **Save**. A Site Profile confirmation screen displays.

6. Select **Edit** to return to the Site Profile screen you just modified.
-OR-
Select **Finish** to return to the Sponsor Site Manager screen.

Note: By selecting program participation, the site will automatically appear on the respective program's site list within the Application Packet.

Note: Sponsors may also add sites via the 'Quick' Site Profile.

Figure 20: Sponsor Site Manager screen

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To delete a Sponsor site

1. On the Applications menu, select **Sponsor Profile.** If a Sponsor has already been selected, the Sponsor Profile Menu screen displays.
   If no Sponsor has been selected, use the Sponsor Search to search for and select a Sponsor.

2. Once a Sponsor has been selected, select **Site Manager.**

3. Select the site you wish to delete.

4. Selected **DELETE** on the Edit menu in the top-right corner.

5. The system transfers you to the bottom of the screen and a warning message is displayed.

6. Select the **Delete** button at the bottom of the page. A confirmation message displays.

> **WARNING:** Once the profile has been deleted, it is permanently removed from the application and cannot be restored. Use caution before deleting a profile.

7. Select **Finish** to return to the Sponsor Site Manager screen.

Batch Holds

The Batch Holds feature enables authorized state users to issue or view payment holds for a Sponsor, by program. Sponsors can still enter claims when a batch hold is in place; however, no payments will be issued by the system for the selected program until the hold is removed.

To view or modify a Batch Hold

1. On the Applications menu, select **Sponsor Profile.** If necessary, search for and select a Sponsor.

2. Once a Sponsor has been selected, select **Batch Holds.** The Batch Holds screen displays.

3. Make any desired modifications.

4. Select **Save**. A confirmation screen displays.

5. Select **Edit** to return to the Batch Holds screen you just modified.
   -OR-
   Select **Finish** to return to the Sponsor Profile Menu screen.

> **TIP:** The Batch Hold Change History provides information on when batch holds were placed and removed and the reason for the hold.

Figure 21: Batch Holds screen

Note: On this screen, "Child & Adult Care Food Program" refers to the Centers program.

To remove a Batch Hold

1. On the Applications menu, select **Sponsor Profile.** If necessary, search for and select a Sponsor.

2. Once a Sponsor has been selected, select **Batch Holds.** The Batch Holds screen displays.

3. Uncheck the **All Months** checkbox.

4. Select the blank space from the drop-down menu for the **Reason Code**.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Batch Holds screen you just modified.
   -OR-
   Select **Finish** to return to the Sponsor Profile Menu screen.

Payment Holds

The Payment Holds feature enables authorized state users to issue or view payment holds on a Sponsor for a specific month/year, by program. Sponsors can still enter claims when a payment hold is in place; however, a payment will not be issued by the system for the selected month/year and program until the hold is removed.

To view or modify a Payment Hold

1. On the Applications menu, select **Sponsor Profile.** If necessary, search for and select a Sponsor.

2. Once a Sponsor has been selected, select **Payment Holds.** The Payment Holds screen

displays.

3. Make any desired modifications.

4. Select **Save**. A confirmation screen displays.

5. Select **Edit** to return to the Payment Holds screen you just modified.
    -OR-
    Select **Finish** to return to the Sponsor Profile Menu screen.

> **TIP:** The Payment Hold Change History provides information on when payment holds were placed and removed and the reason for the hold.

Child & Adult Care Food Program Options

| Payment Hold: (Check all that apply) | ☐ All | ☑ 10/2011 | ☑ 11/2011 | ☑ 12/2011 | ☑ 1/2012 | ☑ 2/2012 | ☑ 3/2012 |
| | | ☑ 4/2012 | ☑ 5/2012 | ☑ 6/2012 | ☑ 7/2012 | ☑ 8/2012 | ☑ 9/2012 |

Reason Code: Claim Validation

Comment: test

Day Care Home Program Options

| Payment Hold: (Check all that apply) | ☐ All | ☐ 10/2011 | ☐ 11/2011 | ☐ 12/2011 | ☐ 1/2012 | ☐ 2/2012 | ☐ 3/2012 |
| | | ☐ 4/2012 | ☐ 5/2012 | ☐ 6/2012 | ☐ 7/2012 | ☐ 8/2012 | ☐ 9/2012 |

Reason Code:

Comment:

Save   Cancel

Payment Hold Change History

Change	Change Date/Time	User
Child & Adult Care Food Program Payment Hold was added due to Claim Validation for: 10/2011, 11/2011, 12/2011, 1/2012, 2/2012, 3/2012, 4/2012, 5/2012, 6/2012, 7/2012, 8/2012, 9/2012.	1/9/2012 11:23:23 AM	Developer

Figure 22: Payment Holds screen

Note: On this screen, "Child & Adult Care Food Program" refers to the Centers program.

To remove a Payment Hold

1. On the Applications menu, select **Sponsor Profile.** If necessary, search for and select a Sponsor.

2. Once a Sponsor has been selected, select **Payment Holds.** The Payment Holds screen displays.

3. Uncheck each checked month checkbox.

4. Select the blank space from the drop-down menu for the **Reason Code**.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Payment Holds screen you just modified.
    -OR-
    Select **Finish** to return to the Sponsor Profile Menu screen.

Application Packet - Centers

In order to participate in the Child and Adult Care Food Program (CACFP), Sponsors must submit an Application Packet to the State for review and approval. At the beginning of each program year, Sponsor data is rolled over and must be verified by Sponsors prior to submitting any claims.

The Center Application Packet contains the Sponsor application, Site application(s), Sponsor Budget Detail, Staff Profile and any required Checklist items. After selecting Application Packet from the Applications menu, each required packet item and its status displays. A red arrow displays beside packet items that are not complete, while a green arrow displays for packet items that have been completed without error. For more details, see *Reviewing an Application*.

Sponsors that wish to receive advance payments must also submit an Advance Request to the State. An advance request must be submitted and approved for each program year. For more details, see *Advance Request*.

Note: Sponsors may not submit claims until their Application Packet has been approved for the respective program year.

Note: Once an Application Packet has been approved, the Application Packet must be re-submitted for approval if any of the following items have been revised:

- Sponsor Application
- Center Application
- Budget Detail
- Staff Profile

An Application Packet does <u>not</u> need to be re-submitted for FDCH Provider Application modifications or revisions.

To access the Application Packet

1. On the blue menu bar, select **Applications**.

2. From the Applications menu, select **Application Packet – Center**. If necessary, search for and select a Sponsor. The Application Packet screen displays.

3. Select the packet item you want to access.

			Packet Assigned To: unassigned
Action	**Form Name**	**Latest Version**	**Status**
View | Modify | Admin	Sponsor Application	Original	Not Submitted
View | Revise	✔ Sponsor Budget Detail	Original	Approved
Details	Staff Profile		
Details	✔ Checklist Summary (7)		
Details	Application Packet Notes		
Details	Attachment List		

	Approved	Pending	Return for Correction	Denied	Withdrawn/ Closed	Error	Total Applications
Site Application(s)	1	1	0	0	0	0	2

[< Back] [Submit for Approval] [Approve] [Return] [Deny] [Withdraw Packet]

Show Packet History

Figure 23: Application Packet – Center screen

If the Application Packet has been submitted for approval by the Sponsor, it becomes "read only" to the Sponsor. The Application Packet screen is displayed with the following message to help make the Sponsor aware that they can no longer modify the submitted packet during this time.

The Application Packet is currently under review by the State and is unavailable for changes.

Figure 24: Application Packet screen – Message

To assign an Application Packet

1. On the blue menu bar, select **Applications**.

2. From the Applications menu, select **Application Packet – Center**. If necessary, search for and select a Sponsor. The Application Packet screen displays.

3. Select the **Packet Assigned To** link. The Application Packet Assignment screen displays.

4. Select the assigned consultant to assign the packet.

5. Select **Save**. A confirmation message is displayed.

6. Select **Edit** to return to the Application Packet Assignment screen you just modified.
   -OR-
   Select **Finish** to return to the Application Packet screen.

To end a Sponsor's enrollment

1. From the Applications menu, select **Application Packet – Center**. If necessary, search for and select a Sponsor. The Application Packet screen displays.

2. Associated with the Sponsor Application, select the link under the **Latest Version** column. The Application History screen is displayed.

3. Select **Close Sponsor**. The End Sponsor Agreement screen is displayed.

4. Enter the **Closed/Terminated Date**. When this Sponsor enters claims, the Days on Operation fields will edit check with this date to ensure meals aren't claimed after the entered date.

5. Select the **Closed/Terminated Code**.

6. Enter the **Closed/Terminated Reason**.

7. If desired, provide a description as to why the Sponsor is ending enrollment in **Closed/Terminated Comment**.

8. Select **Save**. The Application History screen is displayed with a message stating that the Sponsor's enrollment has ended.

The Sponsor's enrollment was 'Self Cancelled' as of: 05/08/2012.

Effective Claim Period	Version	Status	Approved Date
Oct 2011	Rev. 2	Not Submitted	
Oct 2011	Rev. 1	Approved	04/23/2012
Oct 2011	Original	Approved	04/12/2012

< Back   Re-Open Sponsor

Figure 25: Example of a confirmation of cancelled Sponsor enrollment

To re-open a closed Sponsor

1. From the Applications menu, select **Application Packet – Center**. If necessary, search for and select a Sponsor. The Application Packet screen displays.

2. Associated with the Sponsor Application, select the link under the Latest Version column. The Application History screen is displayed.

3. Select **Re-Open Sponsor**. The End Sponsor Agreement screen is displayed.

4. Delete the **Closed/Terminated Date.**

5. Select the blank space from the drop-down menu for the **Closed/Terminated Code**.

6. Delete the **Closed/Terminated Reason**.

7. Delete the Closed/Terminated Description.

8. Once all fields are blank, select **Save**. The Application History screen is displayed.

Sponsor Application

The Sponsor Application screen provides access to the Sponsor's annual application for the Child and Adult Care Food Program. The Sponsor is required to complete a new Sponsor application annually; however, if an application is contained within the system from the previous year, **the State** has identified select application data that rolls over from the previous year and pre-fills a new year's application.

To view a Sponsor application (Original)

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. Select View next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.

> **Note:** If there are multiple versions of a Sponsor application within the system (i.e., revisions exist), the system defaults to the version with the most current Application Effective Date designated on the Sponsor Application's Internal Use Only section.

To view a Sponsor application (Revision)

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The most current year's Application Packet screen displays.

3. Select the revision link under the **Latest Version** column.   The Sponsor Application History for the designated program year is displayed.

4. Select the application version you would like to view.

> **TIP:** The View option appears in two situations: 1) If the user only has view-access security rights or 2) If the user has modify-access security rights BUT the Application Packet has been submitted to the State and is under State review and therefore can no longer be modified.

To add a Sponsor application (New Sponsor)

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The most current year's Application Packet screen displays.

3. Select Add next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.

4. Enter required information.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Sponsor Application screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

> **TIP:** The Add option only appears for new Sponsors. If a Sponsor had an application in the previous year and has elected to enroll in the new year, the prior year's application information is rolled over into the new year's application as a starting point. The user would select **Modify** to review and update this information.

To modify a Sponsor application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The most current year's Application Packet screen displays.

3. Select Modify next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.

4. Modify any desired information.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Sponsor Application screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

> **TIP:** The Modify option only appears when the Application Packet has not been submitted. Once an application has been submitted and approved by the State, a revised application must be submitted (i.e., the Revise option is displayed).

To delete a Sponsor application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The most current year's Application Packet screen displays.

3. Select Modify next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.

4. Select **DELETE** on the Edit menu in the top-right corner.

5. The system transfers you to the bottom of the screen and a warning message is displayed.

6. Select the **Delete** button at the bottom of the page. A confirmation message displays.

> **WARNING**: A Sponsor application can only be deleted if the Sponsor has not yet submitted any claims for the program year.
>
> Once the application has been deleted, it is permanently removed and cannot be restored. Use caution before deleting an application.

To revise a Sponsor application

Note: Only state-approved applications can be revised. Once a Sponsor revises the Sponsor application, the Application Packet must be re-submitted and the state review and approval process starts again.

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The most current year's Application Packet screen displays.

3. Select Revise next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.

4. Modify any desired information.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Sponsor Application screen you just modified.
   -OR-
   Select **Finish** to return to the Application Packet screen.

> **TIP:** The Revise option only appears when the previously submitted Application Packet has been approved by the state.

Site Application(s)

Sponsors must complete a Site Application for each of their sites. The Site Application screen provides access to the annual application for the Child and Adult Care Food Program for both new and renewing sites. New applications must be completed annually; however, if an application is contained within the system from the previous year, **the State** has identified select application data that rolls over from the previous year and pre-fills a new year's application.

To access the Sponsor's site list

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet - Center**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Under Site Applications, select **Site Application(s)**. The CACFP - Application Packet Site List displays.

Action	Site #	Site Name	Type	Latest Version	Status
View | Modify | Admin ➡	1000-T01	Apple Tree Learning Center 001	CC|HS|AR	Rev. 1	Error (3)
View | Modify | Admin ➡	1001-T01	Apple Tree Learning Center 001		Original	Error (20)
View | Modify | Admin ➡	1002	Apple Tree Learning Site 2	CC	Rev. 1	Error (1)
View | Modify | Admin ➡	0132-491	Apples		Original	Error (19)
Add Site					

Total Sites Enrolled: 4

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Figure 26: Application Packet – CACFP Site List screen

To add a new site (only available to Sponsors)

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet - Center**. (If you have not

selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Under Site Applications, select **Site Application(s)**. The CACFP - Application Packet Site List displays.

4. At the bottom of the site list, select **Add Site.** The Available Site(s) screen displays.

> **Note:** The sites displayed on this screen are sites that are designated as CACFP sites on the Site Profile screen, but who do not have a site application.

5. If the site you would like to add an application for is listed, select the site. If the site you would like to add an application for is not listed, select **Add New Site.** If selecting 'Add New Site', the 'Quick' Site Profile screen displays.

6. The system automatically defaults the Site ID to the next available ID for this Sponsor. For new sites, this value can be overridden if needed.

> **TIP:** For most Sponsors, it is highly recommended that you use the Site ID assigned by the system. The system has verified that the assigned ID is unique and is the next available Site ID for the Sponsor.

7. For new sites, enter the Site Name and County.

8. Select **Save.** The Site Application for the new site is displayed.

Site Information

Site ID:	
Site Name:	
County:	

Save   Cancel

Figure 27: 'Quick' Site Profile screen

To view a Site Application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **Center**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Under Site Applications, select **Site Application(s)**. The CACFP - Application Packet Site List displays.

4. Select **View** next to the site whose application you would like to view. The site's Site Application is displayed.

To modify a Site Application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **Center**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Under Site Applications, select **Site Application(s)**. The CACFP - Application Packet Site List displays.

4. Select **Modify** next to the site whose application you would like to view. The Site Application is displayed.

5. Modify any desired information.

6. Select **Save**. A confirmation screen displays.

7. Select **Edit** to return to the Site Application screen.
   -OR-
   Select **Finish** to return to the CACFP Site List screen.

8. Repeat **Steps** 4 through 7 for each site that will participate in the program.

To delete a Site Application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **Center**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Under Site Applications, select **Site Application(s)**. The CACFP - Application Packet Site List displays.

4. Select **Modify** next to the site whose application you would like to delete. The Site Application is displayed.

5. Select **DELETE** on the Edit menu in the top-right corner.

6. The system transfers you to the bottom of the screen and a warning message is displayed.

7. Select the **Delete** button at the bottom of the page. A confirmation message displays.

WARNING: Only a site application that has not been approved can be deleted. Once the application has been deleted, it is permanently removed and cannot be restored. Use caution before deleting an application.

To revise a Site Application

Note: Only state-approved applications can be revised. An application that has been submitted BUT is currently under review by the State CANNOT be revised.

CHILD AND ADULT CARE FOOD PROGRAM USER MANUAL

Once a Sponsor revises a Site Application, the Application Packet must be re-submitted and the state review and approval process starts again. .

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **Center**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Under Site Applications, select **Site Application(s)**. The CACFP - Application Packet Site List displays.

4. Select **Revise** next to the site whose application you would like to revise. The Site Application is displayed.

5. Modify any desired information.

6. Select **Save**. A confirmation screen displays.

7. Select **Edit** to return to the Site Application screen.
   -OR-
   Select **Finish** to return to the CACFP Site List screen.

TIP: The Revise option only appears when the previously submitted Application Packet has been approved by the state.

Closing a Site

A site may be closed within the system, whereby applications cannot be submitted for the site.

To close a Site

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **Center**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Under Site Applications, select **Site Application(s)**. The CACFP - Application Packet Site List displays.

4. Select the link under the Latest Version column for the desired site. The Application History screen is displayed.

5. Select **Close Site**. The End Site Agreement screen is displayed.

6. Enter the **Closed/Terminated Date**. If the Sponsor is entering site level claims, the Days of Operation fields for this site will edit check with this date to ensure meals aren't claimed after the entered date.

7. Select the **Closed/Terminated Code**.

8. Enter the **Closed/Terminated Reason**.

9. If desired, provide a description as to why the site is being closed in the **Closed/Terminated Comment**.

10. Select **Save**. The Site Application History screen is displayed with a message stating that the site's enrollment is closed.

The Site's enrollment was closed/terminated as of: 01/30/2011.

Effective Claim Period	Version	Status	Approved Date
Jul 2010	Rev. 1	Not Submitted	
Jul 2010	Original	Approved	01/27/2011

< Back   Re-Open Site

Figure 28: Example of a Confirmation of a Closed Site

To re-open a closed Site

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **Center**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Under Site Applications, select **Site Application(s)**. The CACFP - Application Packet Site List displays.

4. Select the link under the Latest Version column for the desired site. The Site Application History screen is displayed. If accessing Provider Application(s), first select **View** next to the Provider.

5. Select **Re-Open Site** or **Edit Provider Closure**. The End Site Agreement screen is displayed.

6. Delete the **Closed/Terminated Date.**

7. Select the blank space from the drop-down menu for the **Closed/Terminated Code**.

8. Delete the **Closed/Terminated Reason**.

9. Delete the **Closed/Terminated Description**.

10. Once all fields are blank, select **Save**. The Site Application History screen is displayed.

Sponsor Budget Detail

The Sponsor Budget Detail screen must be completed by all Sponsors. The system will not allow an Application Packet to be submitted without an error-free Budget.

In addition, the Budget Detail must be completed if an Advance Request is submitted; however, the submission of an Advance Request occurs outside of the system's Application Packet sub-module and therefore must be manually validated by the State.

Once a Budget is approved, a revision (i.e., a new version) must be created.

To add a Budget Detail

Note: If there are multiple versions of a budget within the system (i.e., revisions exist), the system defaults to the most current version.

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. Select **Add** next to **Sponsor Budget Detail**. A blank Budget Detail screen displays.

4. Complete the form.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Budget Detail screen.
    -OR-
    Select **Finish** to return to the Application Packet screen.

To view a Budget Detail

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. To view the most current Budget Detail, select **View** next to Sponsor Budget Detail. The Budget Detail screen displays.
    –OR-
    To view a prior Budget Detail, select the revision link under the **Latest Version** column. The Sponsor Budget History for the designated program year is displayed.

Version	Status	Approved Date
Revision 1	Pending Validation	
Original	Approved	04/21/2011

Figure 29: Sponsor Budget History screen

4. Select the budget version you would like to view.

To modify a Budget Detail

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. Select **Modify** next to **Sponsor Budget Detail**. The Budget Detail screen displays with the most current, un-submitted budget data.

4. Modify any desired information.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Budget Detail screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

To revise a Budget Detail

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. Select **Revise** next to **Sponsor Budget Detail**. The Budget Detail screen displays with the most current budget data.

4. Modify any desired information.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Budget Detail screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

TIP: When creating a revision, the system maintains the previously-approved budget that can be accessed via the Sponsor Budget History screen.

To review a Budget Detail

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. Select **Admin** next to **Sponsor Budget Detail**. The Budget Detail screen displays.

4. Review the budget information submitted.

5. Enter information in the Internal Use Only section.

6. Select **Save Internal Use Only.** A confirmation screen displays.

7. Select **Edit** to return to the Budget Detail screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

TIP: Authorized users can also access the Internal Use Only section by selecting Revise next to the Sponsor Budget Detail option on the Application Packet screen and then selecting INTERNAL USE ONLY at the top right of the Budget Detail screen.

To delete a Budget

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. Select **Modify** next to **Sponsor Budget Detail**. The Budget Detail screen displays.

4. Select **Delete** in the top-right corner.

5. Select **Delete** at the bottom of the screen to confirm.

Checklist

A checklist is automatically generated based upon answers to specific questions from the Sponsor and site applications. The checklist identifies supplemental documents that need to be submitted to the state. The Checklist feature allows Sponsors to keep track of documents and their dates of submission. State users use this feature to identify when documents have been received and to denote the status of the documents.

To access a Checklist

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center** or **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Details** for the Checklist. The Checklist Summary screen displays.

Sponsor	Total Items	Submitted Items	Approved Items
Alliance Public Schools	4	4	4

Child & Adult Care Food Program Sites	Total Items	Submitted Items	Approved Items
Burkholder Education Center	3	3	3
District #42	0	0	0

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Figure 30: Checklist Summary screen

To view a Checklist

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. Select **Details** for the Checklist. The Checklist Summary screen displays.

4. Select the Sponsor or Site whose checklist you wish to view. The Checklist screen displays.

> **Note**: Only Sponsors and sites who have completed their applications and who have additional required documents will have a checklist.

Required Forms/Documents to send to NDE		Document Submitted to NDE	Date Submitted to NDE	Document on File w/NDE	Status	Status Date	Last Updated By
Copies of alternate record keeping forms for meal counts or menu production	📎	☑	07/12/2012	☑	Approved	07/17/2012	Developer
CACFP Certificate of Authority	📎	☑	07/12/2012	☑	Approved	07/17/2012	Developer
Copy of Financial Statement	📎	☑	07/12/2012	☑	Approved	07/17/2012	Developer
CACFP Organization Representatives Authorization Statement	📎	☑	07/12/2012	☑	Approved	07/17/2012	Developer

Action	Checklist Item	Comment	Attachment Date/Time
		There are no attachments	

Save   Cancel

Figure 31: Checklist screen

To update a Checklist

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. Select **Details** for the Checklist. The Checklist Summary screen displays.

4. Select the Sponsor or Site whose checklist you wish to update. The Checklist screen displays.

5. Identify whether the document has been submitted and the submission date. The Date Submitted to NDE field automatically defaults to the system date. This can be changed by the user. A checklist is not considered complete until all checklist items are identified as having been submitted.

6. Select **Save**. The Checklist Summary screen displays.

Notes

The Application Packet Notes screen allows state users to read and add notes regarding an entire Application Packet. This enables state users to efficiently communicate and log information pertaining to an Application Packet. Comments regarding a specific Application Packet item can be entered in the Internal Comments field in the Internal Use Only section of the respective screen.

To access application notes

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. Select **Details** for Application Packet Notes. The Application Packet Notes screen displays.

   Note: The Notes feature is only accessible for State users. Sponsors do not have access to the Notes menu option and, therefore, will not be able to access any notes that were entered.

To view an application note

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. Select **Details** for Application Packet Notes. The Application Packet Notes screen displays.

   Note: Notes can only be modified or deleted by the user that created it. For all other users reading another user's note, the note will be **View Only**.

To create a new application note

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. Select **Details** for Application Packet Notes. The Application Packet Notes screen displays.

4. Select the **Create a New Application Note** button. The Application Packet Note screen displays.

5. Enter the **Subject**.

6. Enter the **Note**.

7. Select **Save**. A confirmation screen displays.

8. Select **Edit** to return to the Application Note screen.
   -OR-
   Select **Finish** to return to the Application Notes screen.

Application Note

Subject:

Note:

Created By: Developer on: 5/16/2012 1:48:11 PM

Save   Cancel

Figure 32: Application Note screen

TIP: Once the Create New Application Note button is selected, a blank record is created and displayed on the Application Note screen. Even if you do not enter a note and select the Cancel button, the blank application note will remain and be listed on the Application Notes screen.

To remove the blank note created in error, select it and use the **DELETE** option at the top right of the Application Note screen. To enter information in the blank note, select the note and update the Subject and Note fields on the Application Note screen.

To delete an application note

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center**. The current year's Application Packet screen displays.

3. Select **Details** for Application Packet Notes. The Application Packet Notes screen displays.

4. Under Date, select the date of the note you wish to delete. The Application Note screen displays.

5. Select **DELETE** on the Edit menu in the top-right corner.

6. The system transfers you to the bottom of the screen and a warning message is displayed.

7. Select the **Delete** button at the bottom of the page. A confirmation message displays.

8. Select **Finish** to return to the Application Notes screen.

WARNING: Notes can only be modified or deleted by the user that created it. For all other users reading another user's note, the note will be **View Only**. Selecting the button permanently deletes the Application Note from the application and it will not be recoverable once deleted.

Application Packet – Family Day Care Homes

In order to participate in the Child and Adult Care Food Program (CACFP), Sponsors must submit an Application Packet to the State for review and approval. At the beginning of each program year, Sponsor data is rolled over and must be verified by Sponsors prior to submitting any claims.

The FDCH Application Packet contains the Sponsor application, Provider application(s), FDCH Board of Directors, FDCH Budget Detail, Staff Profile and any required Checklist items. After selecting Application Packet from the Applications menu, each required packet item and its status displays. A red arrow displays beside packet items that are not complete, while a green arrow displays for packet items that have been completed without error. For more details, see *Reviewing an Application*.

Sponsors that wish to receive advance payments must also submit an Advance Request to the State. An advance request must be submitted and approved for each program year. For more details, see *Advance Request*.

Note: Sponsors may not submit claims until their Application Packet has been approved for the respective program year.

Note: Once an Application Packet has been approved, the Application Packet must be re-submitted for approval if any of the following items have been revised:

- Sponsor Application
- Center Application
- Budget Detail
- Staff Profile

An Application Packet does <u>not</u> need to be re-submitted for FDCH Provider Application modifications or revisions.

To access the Application Packet

1. On the blue menu bar, select **Applications**.

2. On the menu, select **Application Packet – FDCH**. If necessary, search for and select a Sponsor. The Application Packet screen displays.

3. Select the packet item you want to access.

Figure 33: Application Packet – Day Care Home Sponsor screen

If the Application Packet has been submitted for approval by the Sponsor, it becomes "read only" to the Sponsor. The Application Packet screen is displayed with the following message to help make the Sponsor aware that they can no longer modify the submitted packet during this time.

Figure 34: Application Packet screen – Message

To assign an Application Packet

1. On the blue menu bar, select **Applications**.

2. From the Applications menu, select **Application Packet – FDCH**. If necessary, search for and select a Sponsor. The Application Packet screen displays.

3. Select the **Packet Assigned To** link. The Application Packet Assignment screen displays.

4. Select the assigned consultant to assign the packet.

5. Select **Save**. A confirmation message is displayed.

6. Select **Edit** to return to the Application Packet Assignment screen you just modified.
   -OR-
   Select **Finish** to return to the Application Packet screen.

To end a Sponsor's enrollment

1. From the Applications menu, select **Application Packet – FDCH**. If necessary, search for and select a Sponsor. The Application Packet screen displays.

2. Associated with the Sponsor Application, select the link under the Latest Version column. The Application History screen is displayed.

3. Select **Close Sponsor**. The End Sponsor Agreement screen is displayed.

4. Enter the **Closed/Terminated Date**. When this Sponsor enters claims, the Days on Operation fields will edit check with this date to ensure meals aren't claimed after the entered date.

5. Select the **Closed/Terminated Code**.

6. Enter the **Closed/Terminated Reason**.

7. If desired, provide a description as to why the Sponsor is ending enrollment in **Closed/Terminated Comment**.

8. Select **Save**. The Application History screen is displayed with a message stating that the Sponsor's enrollment has ended.

The Sponsor's enrollment was 'Self Cancelled' as of: 05/08/2012.

Effective Claim Period	Version	Status	Approved Date
Oct 2011	Rev. 2	Not Submitted	
Oct 2011	Rev. 1	Approved	04/23/2012
Oct 2011	Original	Approved	04/12/2012

< Back   Re-Open Sponsor

Figure 35: Example of a confirmation of cancelled Sponsor enrollment

To re-open a closed Sponsor

1. From the Applications menu, select **Application Packet – FDCH**. If necessary, search for and select a Sponsor. The Application Packet screen displays.

2. Associated with the Sponsor Application, select the link under the Latest Version column. The Application History screen is displayed.

3. Select **Re-Open Sponsor**. The End Sponsor Agreement screen is displayed.

4. Delete the **Closed/Terminated Date.**

5. Select the blank space from the drop-down menu for the **Closed/Terminated Code**.

6. Delete the **Closed/Terminated Reason**.

7. Delete the Closed/Terminated Description.

8. Once all fields are blank, select **Save**. The Application History screen is displayed.

Sponsor Application

The Sponsor Application screen provides access to the Sponsor's annual application for the Child and Adult Care Food Program. The Sponsor is required to complete a new Sponsor application annually; however, if an application is contained within the system from the previous year, **the State** has identified select application data that rolls over from the previous year and pre-fills a new year's application.

To view a Sponsor application (Original)

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select View next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.

> **Note:** If there are multiple versions of a Sponsor application within the system (i.e., revisions exist), the system defaults to the version with the most current Application Effective Date designated on the Sponsor Application's Internal Use Only section.

To view a Sponsor application (Revision)

5. On the blue menu bar, select **Applications.**

6. From the Applications menu, select **Application Packet – FDCH**. The most current year's Application Packet screen displays.

7. Select the revision link under the **Latest Version** column.   The Sponsor Application History for the designated program year is displayed.

8. Select the application version you would like to view.

> **TIP:** The View option appears in two situations: 1) If the user only has view-access security rights or 2) If the user has modify-access security rights BUT the Application Packet has been submitted to the State and is under State review and therefore can no longer be modified.

To add a Sponsor application (New Sponsor)

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The most current year's Application Packet screen displays.

3. Select Add next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.

4. Enter required information.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Sponsor Application screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

TIP: The Add option only appears for new Sponsors. If a Sponsor had an application in the previous year and has elected to enroll in the new year, the prior year's application information is rolled over into the new year's application as a starting point. The user would select **Modify** to review and update this information.

To modify a Sponsor application

7. On the blue menu bar, select **Applications.**

8. From the Applications menu, select **Application Packet – FDCH**. The most current year's Application Packet screen displays.

9. Select Modify next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.

10. Modify any desired information.

11. Select **Save**. A confirmation screen displays.

12. Select **Edit** to return to the Sponsor Application screen.
    -OR-
    Select **Finish** to return to the Application Packet screen.

TIP: The Modify option only appears when the Application Packet has not been submitted.   Once an application has been submitted and approved by the State, a revised application must be submitted (i.e., the Revise option is displayed).

To delete a Sponsor application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The most current year's Application Packet screen displays.

3. Select Modify next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.

4. Select **DELETE** on the Edit menu in the top-right corner.

5. The system transfers you to the bottom of the screen and a warning message is displayed.

6. Select the **Delete** button at the bottom of the page. A confirmation message displays.

WARNING: A Sponsor application can only be deleted if the Sponsor has not yet submitted any claims for the program year.

Once the application has been deleted, it is permanently removed and cannot be restored. Use caution before deleting an application.

To revise a Sponsor application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The most current year's Application Packet screen displays.

3. Select Revise next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.

4. Modify any desired information.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Sponsor Application screen you just modified.
    -OR-
    Select **Finish** to return to the Application Packet screen.

> **TIP:** The Revise option only appears when the previously submitted Application Packet has been approved by the state.

Provider Application(s)

Sponsors must complete a Provider Application for each of their providers. The Provider Application screen provides access to the annual application for the Child and Adult Care Food Program for both new and renewing providers. New applications must be completed annually; however, if an application is contained within the system from the previous year, **the State** has identified select application data that rolls over from the previous year and pre-fills a new year's application.

To access the Sponsor's provider list

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **FDCH**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Under Site Applications, select **Provider Application(s)**. The CACFP - Application Packet FDCH Provider List displays.

> **Note:** Selecting a link in the Provider Totals section will limit the list of providers displayed below. You may also search for a specific provider by License Number, Provider Name or Alternate Provider ID.

Figure 36: Application Packet – FDCH Provider List screen

To add a new provider (only available to Sponsors)

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **FDCH**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Select **Provider Application(s)**. The CACFP - Application Packet FDCH Provider List displays.

4. At the bottom of the site list, select **Add Provider.** The Add Provider screen displays.

5. Enter the applicable search criteria and click **Search**.

   Note: If the provider is classified as "Licensed" or "Registered", a license number is required. If the provider is classified as "Military" or "Tribal", a last name is required.

6. If the provider you would like to add an application for is listed, select the **Add** link. If the site you would like to add an application for is not listed, enter the first and last name and select **Add New Provider.** A new Provider Application displays.

To view a Provider Application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **FDCH**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Select **Provider Application(s)**. The CACFP - Application Packet FDCH Provider List displays.

4. Select **Details** next to the provider whose application you would like to view.

5. Select **View** next to view the respective version of the application.

To modify a Provider Application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **FDCH**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Select **Provider Application(s)**. The CACFP - Application Packet FDCH Provider List displays.

4. Select **Details** next to the provider whose application you would like to modify.

5. Select **Modify** next to the provider whose application you would like to view. The Provider Application is displayed.

6. Modify any desired information.

7. Select **Save**. A confirmation screen displays.

To delete a Provider Application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **FDCH**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Select **Provider Application(s)**. The CACFP - Application Packet FDCH Provider List displays.

4. Select **Details** next to the provider whose application you would like to delete.

5. Select the **Modify** link for the desired application version. The Provider Application is displayed.

6. Select **DELETE** on the Edit menu in the top-right corner.

7. The system transfers you to the bottom of the screen and a warning message is displayed.

8. Select the **Delete** button at the bottom of the page. A confirmation message displays.

WARNING: Only a provider application that has not been approved can be deleted. Once the application has been deleted, it is permanently removed and cannot be restored. Use caution before deleting an application.

To revise a Provider Application

Note: Only state-approved applications can be revised. An application that has been submitted BUT is currently under review by the State CANNOT be revised.

The Application Packet does not need to be re-submitted for review and approval if a Sponsor revises a Provider Application.

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **FDCH**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Select **Provider Application(s)**. The CACFP - Application Packet FDCH Provider List displays.

4. Select **Details** next to the provider whose application you would like to revise.

5. Select the **Revise** link for the desired application version. The Provider Application is displayed.

6. Modify any desired information.

7. Select **Save**. A confirmation screen displays.

> **TIP:** The Revise option only appears when the previously submitted Application Packet has been approved by the state.

Closing a Provider
A provider may be closed within the system, whereby applications cannot be submitted for the provider.

To close a Provider

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **FDCH**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Select **Provider Application(s)**. The CACFP - Application Packet FDCH Provider List displays.

4. Select **Details** next to the provider you would like to close.

5. Select **Close Provider**. The End Site Agreement screen is displayed.

6. Enter the **Closed/Terminated Date**. If the Sponsor is entering site level claims, the Days of Operation fields for this site will edit check with this date to ensure meals aren't claimed after the entered date.

7. Select the **Closed/Terminated Code**.

8. Enter the **Closed/Terminated Reason**.

9. If desired, provide a description as to why the site is being closed in the **Comment(s)**.

10. Select **Save**. The Site Application History screen is displayed with a message stating that the site's enrollment is closed.

Provider closure information has been saved.
The Provider's enrollment was closed with code: 'Provider Transfer'.

Action	Effective Claim Period	Version	Tier	Status	Approved Date
View	Oct 2010	1	Tier I	Approved	8/2/2011 9:25:27 AM

[< Back]   [Revise Application]   [State Use] [Edit Provider Closure]

Figure 37: Example of a Confirmation of a Closed Provider

To re-open a closed Provider

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **FDCH**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's Application Packet screen displays for the selected Sponsor.

3. Select **Provider Application(s)**. The CACFP - Application Packet FDCH Provider List displays.

4. Select **Details** next to the provider you would like to close.

5. Select **Edit Provider Closure**. The End Site Agreement screen is displayed.

6. Delete the **Closed/Terminated Date.**

7. Select the blank space from the drop-down menu for the **Closed/Terminated Code**.

8. Delete the **Closed/Terminated Reason**.

9. Delete the **Closed/Terminated Description**.

10. Once all fields are blank, select **Save**. The Provider Application Effective Dates screen is displayed.

Transferring a Provider

A provider may be transferred from one contracting entity to another within the system.

To transfer a Provider

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet** - **FDCH**. (If you have not selected a Sponsor, the Sponsor Search screen displays.) The most current year's

Application Packet screen displays for the selected Sponsor.

3. Select **Provider Application(s)**. The CACFP - Application Packet FDCH Provider List displays.

4. Select **Add Provider.**

5. Search for the desired provider by type, license number and/or last name. If the provider is eligible to be transferred, a Transfer link displays.

6. Select **Transfer**. The Provider Transfer screen displays.

7. Enter the **Transfer Start Date**. (The Transfer Start Date must occur after the Transfer Close Date and cannot occur in the same month as the Transfer Close Date.)

8. Enter the **Close Date**.

9. Enter the **Transfer Reason**.

10. If desired, enter any comments.

11. Select **Save**.

Board of Directors

The Board of Directors Member List details all board members associated with the Center or Day Care Home. This form must be completed as part of the Application Packet.

To add a Board of Directors list

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Add** for the Board of Directors.

4. Select **Add Member**. The Board of Directors – Member Information screen displays.

Board Member Information

		Salutation	First Name	Last Name
1.	Board Member Type:	▼		
2.	Length of Time on Board:			
3.	Name:	▼		
4.	Date of Birth:		(mm/dd/yyyy)	
5.	Email Address:			
6.	Phone:	Ext:	Fax:	
7.	Occupation:			
8.	Current Employer:			

Home Address

9. Address 1:
10. Address 2:
11. City:
12. State: NE Zip:

13. Is this member related to other board members or staff of this organization?   ○ Yes   ○ No

   If **Yes**, please specify name and position held:

Created By: Developer on: 9/7/2012 11:07:56 AM

Save   Cancel

Figure 38: Board of Directors – Member Information

5. Complete the Board Member Information.

6. Select **Save.**

7. Select **Finish** to return to the Board of Directors Member List.

To view or modify the Board of Directors

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Details** for the Board of Directors Board Member List.

Action	Name	Board Position	Phone
View | Modify	Jane Thompson 4245 N. 51st Dr. Omaha, NE 68105 DOB: 01/01/1967	Executive Director	(602) 852-9685

Internal Use Only

☐   Reviewed

Created By: Developer on: 9/7/2012 11:07:34 AM   Modified By: Developer on: 9/7/2012 11:10:00 AM

< Back   Add Member

Figure 39: Board of Directors Member List screen

4. Select **View** or **Modify** to access Board of Directors – Member Information.

5. Modify any desired information.

6. Select **Save.**

7. Select **Finish** to return to the Board of Directors Member List.

To add a member to the Board of Directors

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Details** for Board of Directors Board Member List.

4. Select **Add Member**.

5. Complete the Board of Directors – Member Information screen.

6. Select **Save.**

To delete a member from the Board of Directors

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Details** for Board of Directors Board Member List.

4. Select **Modify** for the member you wish to delete.

5. Select **Delete** in the top-right corner.

6. Select **Delete** at the bottom of the screen to confirm**.**

To review the Board of Directors (State Use Only)

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Admin** for Board of Directors Board Member List.

4. Review all information.

5. Select the **Reviewed** checkbox.

6. Select **Save.**

FDCH Budget Detail

The FDCH Budget Detail screen must be completed by all Sponsors. The system will not allow an Application Packet to be submitted without an error-free Budget.

In addition, the Budget Detail must be completed if an Advance Request is submitted; however, the submission of an Advance Request occurs outside of the system's Application Packet sub-module and therefore must be manually validated by the State.

Once a Budget is approved, a revision (i.e., a new version) must be created.

To add a Budget Detail

Note: If there are multiple versions of a budget within the system (i.e., revisions exist), the system defaults to the most current version.

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Add** next to **Budget Detail**. A blank Budget Detail screen displays.

4. Complete the form.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Budget Detail screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

To view a Budget Detail

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – Center** or **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. To view the most current Budget Detail, select **View** next to Sponsor Budget Detail. The

Budget Detail screen displays.

–OR-

To view a prior Budget Detail, select the revision link under the **Latest Version** column. The Sponsor Budget History for the designated program year is displayed.

Version	Status	Approved Date
Revision 1	Pending Validation	
Original	Approved	04/21/2011

Figure 40: Sponsor Budget History screen

4. Select the budget version you would like to view.

To modify a Budget Detail

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Modify** next to **Sponsor Budget Detail**. The Budget Detail screen displays with the most current, un-submitted budget data.

4. Modify any desired information.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Budget Detail screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

To revise a Budget Detail

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Revise** next to **Sponsor Budget Detail**. The Budget Detail screen displays with the most current budget data.

4. Modify any desired information.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Budget Detail screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

> **TIP:** When creating a revision, the system maintains the previously-approved budget that can be accessed via the Sponsor Budget History screen.

To review a Budget Detail

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Admin** next to **Sponsor Budget Detail**. The Budget Detail screen displays.

4. Review the budget information submitted.

5. Enter information in the Internal Use Only section.

6. Select **Save Internal Use Only.** A confirmation screen displays.

7. Select **Edit** to return to the Budget Detail screen.
    -OR-
    Select **Finish** to return to the Application Packet screen.

> **TIP:** Authorized users can also access the Internal Use Only section by selecting Revise next to the Budget Detail option on the Application Packet screen and then selecting INTERNAL USE ONLY at the top right of the Budget Detail screen.

To delete a Budget

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Modify** next to **Sponsor Budget Detail**. The Budget Detail screen displays.

4. Select **Delete** in the top-right corner.

5. Select **Delete** at the bottom of the screen to confirm.

FDCH Management Plan

The Management Plan screen must be completed by all Sponsors in order to submit the Application Packet.

Once a Management Plan is approved, a revision (i.e., a new version) must be created if any changes are to be made.

To add a Management Plan

> **Note:** If there are multiple versions of a budget within the system (i.e., revisions exist), the system defaults to the most current version.

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Modify** next to **Management Plan**.

4. Complete the form.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the **Management Plan** screen.
    -OR-
    Select **Finish** to return to the Application Packet screen.

To view a Management Plan

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. To view the most current Management Plan, select **View**.

    –OR-

    To view a prior Management Plan, select the revision link under the **Latest Version** column.   The Management Plan History for the designated program year is displayed.

Version	Status	Approved Date
Original	Pending Approval	
Original	Approved	04/23/2012

< Back

Figure 41: Management Plan History screen

4. Select the version you would like to view.

To modify a Management Plan

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Modify** next to Management Plan.

4. Modify any desired information.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Management Plan screen.
    -OR-
    Select **Finish** to return to the Application Packet screen.

To revise a Management Plan

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Revise** next to Management Plan.

4. Modify any desired information.

5. Select **Save**. A confirmation screen displays.

6. Select **Edit** to return to the Management Plan screen.
    -OR-
    Select **Finish** to return to the Application Packet screen.

> **TIP:** When creating a revision, the system maintains the previously-approved budget that can be accessed via the Management Plan History screen.

To review a Management Plan

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Admin** next to Management Plan.

4. Review the Management Plan information submitted.

5. Enter information in the Internal Use Only section.

6. Select **Save Internal Use Only.** A confirmation screen displays.

7. Select **Edit** to return to the Management Plan screen.
    -OR-
    Select **Finish** to return to the Application Packet screen.

> **TIP:** Authorized users can also access the Internal Use Only section by selecting Revise next to the Budget Detail option on the Application Packet screen and then selecting INTERNAL USE ONLY at the top right of the Budget Detail screen.

To delete a Management Plan

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Modify** next to Management Plan.

4. Select **Delete** in the top-right corner.

5. Select **Delete** at the bottom of the screen to confirm.

Checklist

A checklist is automatically generated based upon answers to specific questions from the Sponsor and site applications. The checklist identifies supplemental documents that need to be submitted to the state. The Checklist feature allows Sponsors to keep track of documents and their dates of submission. State users use this feature to identify when documents have been received and to denote the status of the documents.

To access a Checklist

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Details** for the Checklist. The Checklist Summary screen displays.

Sponsor	Total Items	Submitted Items	Approved Items
Apple Tree Learning Center	16	16	8

Figure 42: Checklist Summary screen

To view a Checklist

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Details** for the Checklist. The Checklist Summary screen displays.

4. Select the Sponsor or Site/Provider whose checklist you wish to view. The Checklist screen displays.

   Note: Only Sponsors and sites who have completed their applications and who have additional required documents will have a checklist.

Required Forms/Documents to send to NDE		Document Submitted to NDE	Date Submitted to NDE	Document on File w/NDE	Status	Status Date	Last Updated By
Copies of alternate record keeping forms for meal counts or menu production	📎	☑	07/12/2012	☑	Approved	07/17/2012	Developer
CACFP Certificate of Authority	📎	☑	07/12/2012	☑	Approved	07/17/2012	Developer
Copy of Financial Statement	📎	☑	07/12/2012	☑	Approved	07/17/2012	Developer
CACFP Organization Representatives Authorization Statement	📎	☑	07/12/2012	☑	Approved	07/17/2012	Developer

Action	Checklist Item	Comment	Attachment Date/Time
		There are no attachments	

Save   Cancel

Figure 43: Checklist screen (example)

To update a Checklist

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Details** for the Checklist. The Checklist Summary screen displays.

4. Select the Sponsor or Site/Provider whose checklist you wish to update. The Checklist screen displays.

5. Identify whether the document has been submitted and the submission date. The Date Submitted to NDE field automatically defaults to the system date. This can be changed by the user. A checklist is not considered complete until all checklist items are identified as having been submitted.

6. Select **Save**. The Checklist Summary screen displays.

Notes

The Application Packet Notes screen allows state users to read and add notes regarding an entire Application Packet. This enables state users to efficiently communicate and log information pertaining to an Application Packet. Comments regarding a specific Application Packet item can be entered in the Internal Comments field in the Internal Use Only section of the respective screen.

To access application notes

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Details** for Application Packet Notes. The Application Packet Notes screen displays.

Note: The Notes feature is only accessible for State users. Sponsors do not have access to the Notes menu option and, therefore, will not be able to access any notes that were entered.

To view an application note

4. On the blue menu bar, select **Applications.**

5. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

6. Select **Details** for Application Packet Notes. The Application Packet Notes screen displays.

Note: Notes can only be modified or deleted by the user that created it. For all other users reading another user's note, the note will be **View Only**.

To create a new application note

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Details** for Application Packet Notes. The Application Packet Notes screen displays.

4. Select the **Create a New Application Note** button. The Application Packet Note screen displays.

5. Enter the **Subject**.

6. Enter the **Note**.

7. Select **Save**. A confirmation screen displays.

8. Select **Edit** to return to the Application Note screen.
    -OR-
    Select **Finish** to return to the Application Notes screen.

Application Note

Subject:

Note:

Created By: Developer on: 5/16/2012 1:48:11 PM

Save   Cancel

Figure 44: Application Note screen

TIP: Once the Create New Application Note button is selected, a blank record is created and displayed on the Application Note screen. Even if you do not enter a note and select the Cancel button, the blank application note will remain and be listed on the Application Notes screen.

To remove the blank note created in error, select it and use the **DELETE** option at the top right of the Application Note screen. To enter information in the blank note, select the note and update the Subject and Note fields on the Application Note screen.

To delete an application note

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet – FDCH**. The current year's Application Packet screen displays.

3. Select **Details** for Application Packet Notes. The Application Packet Notes screen displays.

4. Under Date, select the date of the note you wish to delete. The Application Note screen displays.

5. Select **DELETE** on the Edit menu in the top-right corner.

6. The system transfers you to the bottom of the screen and a warning message is displayed.

7. Select the **Delete** button at the bottom of the page. A confirmation message displays.

8. Select **Finish** to return to the Application Notes screen.

WARNING: Notes can only be modified or deleted by the user that created it. For all other users reading another user's note, the note will be **View Only**. Selecting the button permanently deletes the Application Note from the application and it will not be recoverable once deleted.

Download Forms

The Download Forms function allows users to view, download and/or print all forms and documents made available on the site by the State.

To access Download Forms

1. On the blue menu bar, select **Applications**.

2. From the Applications menu, select **Download Forms**. The Download Forms screen displays.

To download or view a form

1. On the blue menu bar, select **Applications**.

2. On the menu, select **Download Forms**. The Download Forms screen displays a list of all available forms.

3. Select the Form ID of the form you wish to download. If the form is a document, a gray dialog box appears.

4. Select **Open** to view the form.
    - OR -
    Select **Save** to save the form to your computer.

> **Note:** The software application associated with the form will initiate the opening of the form. For example, if the form is a Microsoft Word document, Microsoft Word on your desktop will initiate the opening of the form. This is also true with Microsoft Excel or Adobe Acrobat forms.

5. Select the **Back** button to return to the previous screen.

Download Forms

Form ID	Description	Last Modified	New Sponsor?
1234_5	New Form	04/16/2012	Y
CACFP001	CACFP Audit Provisions	01/21/2011	
DCH 12	Sample Duty Statement	05/11/2012	Y

< Back

Figure 45: Download Forms screen (partial screen)

> **TIP:** The New Sponsor? column indicates whether the form is required for submission by Sponsors new to the Child and Adult Care Food Program.

4

Claims

The Claims component allows Sponsors to submit monthly online reimbursement claim requests to the State, review claim rates, and review historical payment summaries.

About the Claims Process

A Sponsor submits a reimbursement claim to the State for every month in which one or more sites participate in the Child and Adult Care Food Program. Sponsors may enter Sponsor and site information into the monthly claim form beginning at the first of every month. Sponsors have sixty days from the last day of the claim month/year to submit an original claim. At the time claims are submitted, the submitted claim is reviewed by the system to ensure that it confirms to established business rules governing reimbursement claim eligibility and approval.

Note: Claims cannot be created for a month if there is no approved Application Packet in effect for that period. If you cannot access claims for a specific month, be sure your Application Packet has been approved. If your Application Packet has been approved and you still cannot enter a claim for a specific month, contact the Child Nutrition Program to validate the effective date of the Sponsor application and Site application.

The following table identifies the steps related to submitting and processing a claim:

Performed by	Task
Sponsor	• Complete the Claim for Reimbursement form(s) for the selected claim month. • Submit error-free claim to the State for processing.
State	• Review and approve claim. • Select claim for inclusion in the payment process. • Send payment information to the appropriate State agency for payment.

Claims Menu

Sponsors use the Claims Menu to access CACFP claim functions, view current claim rates, or view payment summaries. From the menu, select a claims item to access that claim function.

Item	Description
Claim Entry - Centers	Center Claim Entry (Breakfast, Lunch, Supper, Supplements)
Claim Entry - DCH	DCH Claim Entry (Breakfast, Lunch, Supper, Supplements)
Claim Rates - Centers	Adult and Child Care Center Claim Rates - View current claim rates
Claim Rates - DCH	Day Care Home Provider Claim Rates - View current claim rates
Payment Summary	Payment Summary

Figure 46: Claims Menu

Claim Dates

The table below lists and describes the various dates used throughout the Claims functions of the system:

Date	Description
Date Created	This date is set to the current system date when the claim is initially created.
Date Modified	This date is set to the current system date when the claim is initially created and each time the claim is saved.
Date Received	This date is typically set to the date the claim was first submitted to the State. The date can be changed by an authorized State user via the Internal Use Only section of the claim form until the claim has been processed for payment. The value of this field is used to validate the 60 day claim rules.
Date Accepted	This date is set to the current system date each time the claim is submitted for payment and contains no errors. If errors are detected during the submit process, the date is not set. These claims are identified with a status of "Accepted". Accepted claims can be modified until they are included in a payment batch.
Date Processed	This is the date that the claim was added by the State into the batch payment process (via Payment Tracking in the Accounting module). Once the claim has been added to a batch (i.e., "batched"), it cannot be modified. These claims are identified with a status of "*Accepted" until the batch process has completed. When the batch process is completed, the status of the claim is "Processed". If a change is required to a claim that has a status of "*Accepted" or "Processed", a revised claim must be entered into the system.

Claim Entry

The Claim Entry function is used to enter, modify, and view Center and FDCH claims. The system provides the ability to submit claims at the Sponsor or site level. Original and upward adjusted claims cannot be submitted if the received date is more than 60-days since the last day of claim month/year. In order to create a claim in a given month, an approved Application Packet must be in effect for the period.

Note: The general claims functionality is the same for both Centers and Day Care Homes.

To access claim entry

1. On the blue menu bar, select **Claims**.

2. On the Claims menu, select **Claim Entry – Centers** or **Claim Entry - DCH**.

   If a Sponsor has already been selected, the Claim Summary screen displays.
   If no Sponsor has been selected, use the Sponsor Search to search for and select a Sponsor.

3. Select the Claim Month you would like to submit a claim. The Claim Month Details screen displays.

   Note: The current program year is the default year if no other program year has been selected.

Claim Year Summary

The Claim Year Summary summarizes information regarding the claim for each claim month in the designated year:

- Adj Number: identifies the number of revisions associated with the claim. Each revision must be re-processed by the state.

- Claim Status: identifies the current status of the claim.

- Date Received: identifies the date the system initially received the claim submission. Note: the State has the authority to modify this date.

- Date Processed: identifies the date the claim was included in the payment batch process.

- Earned Amount: identifies the current value of the claim.

   Note: Only months that are identified as valid operational months for the Sponsor are enabled to submit claims.

Claim Month	Adj Number	Claim Status	Date Received	Date Processed	Earned Amount
Jul 2010					$0.00
Aug 2010					$0.00
Sep 2010	1	Processed	02/02/2011	02/03/2011	$37,835.58
Oct 2010	0	Processed	02/03/2011	02/03/2011	$34,291.36
Nov 2010					$0.00
Dec 2010					$0.00
Jan 2011					$0.00
Feb 2011					$0.00
Mar 2011					$0.00
Apr 2011					$0.00
May 2011					$0.00
Jun 2011					$0.00
				Year to Date Totals	$72,126.94

Figure 47: Claim Year Summary screen

Claim Month Details

From the Claim Month Details screen, you can access a specific claim form or a summary of the submitted claim.

If the claim has been processed, the options are View (to view the completed claim form) or Summary (to view the calculated payment summary related to the claim).

Claim Month: September 2010

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View | Summary	0	02/02/2011	02/02/2011	02/02/2011	$37,843.34	Processed
View | Summary	1	02/02/2011	02/02/2011	02/03/2011	($7.76)	Processed
				Total Earned	$37,835.58	

Figure 48: Claim Month Details screen – Example of Processed Claims

If the claim has not been processed, the options are View (to view the completed claim form), Modify (to enter a new claim or modify an existing claim) or Summary (to view the calculated payment summary related to the claim).

Claim Month: August 2010

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View | Modify | Summary	0	11/30/2010	01/26/2011		$109.55	Accepted
				Total Earned	$109.55	

Figure 49: Claim Month Details screen – Example of Non-Processed Claims

Note: Claims can be modified UNTIL they have been added by the State into the batch payment process. Once a claim has been included in a payment batch, the status of the claim is "Accepted*" until the batch process has completed. When the batch process has completed, the status of the claim is "Processed".

Claim Site List

If the Sponsor has been identified by the State as performing site-level claiming on the Sponsor Profile screen, the Sponsor would use the Claim Site List screen to select the site whose claim to add, view, or modify.

Note: Only active sites will have a link to open the Claim for Reimbursement screen.

Month/Year Claimed	Adjustment Number	Date Received	Date Accepted	Date Processed	Reason Code
Aug 2009	1				

Internal Use Only

Actions	Site #	Site Name		Errors	Status
View | Revise	1032	West Elementary School			Paid
View | Modify	1033	Southwest Elementary			Incomplete

Figure 50: Claim Site List screen

To add an original claim

Claims can be entered for each eligible month in the program year. Eligible months are determined based on an approved Application Packet and the designated application effective date (identified by the State in the Internal Use Only section of the Sponsor and Site applications).

1. From the Claims menu, select **Claim Entry – Centers** or **Claim Entry - DCH**. The Claim Year Summary screen displays.

2. Select the desired Claim Month. The Claim Month Details screen displays.

3. Select **Add Original Claim** button. If the Sponsor is performing Sponsor-level claiming, the Claim for Reimbursement screen displays.

   If the Sponsor is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Add** to the left of the Site Name you wish to add an original claim. The Claim for Reimbursement screen displays.

Claim Month: July 2010

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
There are no claims for this month.						
				Total Earned	$0.00	

< Back   Add Original Claim

Figure 51: Claim Month Details screen – Add Original Claim

Note: The **Add Original Claim** button will only display on Claim Month Details screens that currently have no claims created.

4. Enter claim information for all enrolled programs. Only the programs identified in an approved Application Packet with the appropriate effective date will be available for data entry.

5. Select **Save**. The Claim Month Details screen displays.

6. Review the information.

To make a modification or correction to the claim, select the **Back** button to return to the Claim for Reimbursement screen.

To submit the claim, check the Certification box and select the **Submit for Payment** button.

Note: When the **Submit for Payment** button is selected, the system performs additional edit checks (e.g., 60 day rule, etc.). If the system identifies errors, the errors must be corrected before the user can submit the claim for payment.

WARNING: An original claim cannot be submitted by a Sponsor if the received date is more than 60-days since the last day of claim month/year. For exceptions to this rule, contact the Child Nutrition Program.

To modify an un-processed claim

Claims can be modified as many times as desired until the claim has been submitted **and** processed by the State for payment distribution.

1. From the Claims menu, select **Claim Entry – Centers** or **Claim Entry - DCH**. The Claim Year Summary screen displays.

2. Select the desired Claim Month. The Claim Month Details screen displays.

3. If the Sponsor is performing Sponsor-level claiming, select **Modify.** The Claim for Reimbursement screen displays.

   If the Sponsor is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Modify** to the left of the Site Name you wish to view. The Claim for Reimbursement screen displays.

Claim Month: October 2010						
Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View | Modify | Summary	0	01/26/2011			$1,151.70	Pending
				Total Earned	$1,151.70	

Figure 52: Claim Month Details screen – Modify an Un-processed Claim

Note: The Summary link is not active until a claim has been submitted with no errors.

4. Update claim information.

5. Select **Save**. The Claim Month Details screen displays.

6. Review the information.

   To make a modification or correction to the claim, select the **<Back** button to return to the Claim for Reimbursement screen.

   To submit the claim, check the Certification box and select the **Submit for Payment** button.

Note: When the **Submit for Payment** button is selected, the system performs additional edit checks (e.g., 60 day rule, etc.). If the system identifies errors, the errors must be corrected before the user can submit the claim for payment.

WARNING: An original claim cannot be submitted by a Sponsor if the received date is more than 60-days since the last day of claim month/year. For exceptions to this rule, contact the Child Nutrition Program.

To revise a processed Sponsor-level claim

Claim revision resulting in a downward adjustment may be submitted at any time. Claim revisions resulting in an upward adjustment may be submitted if the date of submission is within 60 days of the last day of the original claim month. Revised claims must be re-processed by the State regardless of their original status.

1. From the Claims menu, select **Claim Entry – Centers** or **Claim Entry - DCH**. The Claim Year Summary screen displays.

2. Select the desired Claim Month. The Claim Month Details screen displays.

3. If the Sponsor is performing Sponsor-level claiming, select **Add Revision** button. The Claim for Reimbursement screen displays.

Claim Month: November 2010

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View	Summary	0	01/19/2011	01/19/2011	01/24/2011	$12,850.30	Processed
View	Summary	1	02/02/2011	02/02/2011	02/04/2011	$3,311.70	Processed
				Total Earned	$16,162.00	

< Back   Add Revision

Figure 53: Claim Month Details screen – Add Revision

If the Sponsor is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Revise** to the left of the Site Name whose claim you wish to revise. The Claim for Reimbursement screen displays.

Note: The **Add Revision** button will only display on Claim Month Details screens that currently have no claims created.

4. Make any necessary changes to the claim.

5. Select **Save**. The Claim Month Details screen displays.

6. Review the information.

    To make a modification or correction to the claim, select the **<Back** button to return to the Claim for Reimbursement screen.

    To submit the revised claim, check the Certification box and select the **Submit for Payment** button.

Note: Revised claims must be re-processed by the State regardless of their original status.

WARNING: An upward adjusted claim cannot be submitted by a Sponsor if the received date is more than 60-days since the last day of claim month/year. For exceptions to this rule, contact the Child Nutrition Program.

To view a claim

1. From the Claims menu, select **Claim Entry – Centers** or **Claim Entry - DCH**. The Claim Year Summary screen displays.

2. Select the desired Claim Month. The Claim Month Details screen displays.

3. If the Sponsor is performing Sponsor-level claiming, select **View.** The Claim for Reimbursement screen displays.

   If the Sponsor is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **View** to the left of the Site Name you wish to view. The Claim for Reimbursement screen displays.

To view a Claim Summary

The Claim Summary allows you to view a summary of the month's claim in an easy-to-read or print format. No modifications can be made from this page. A Claim Summary is not available until a claim has been submitted with no errors.

1. From the Claims menu, select **Claim Entry – Centers** or **Claim Entry - DCH**. The Claim Year Summary screen displays.

2. Select the desired Claim Month. The Claim Month Details screen displays.

3. Select **Summary.** The Claim for Reimbursement Summary screen displays.

To delete a claim

If the Contracting Entity has entered a claim in error and the claim has **not** been included in the batch payment process (i.e., the status of the claim is NOT "Accepted*" or "Processed"), the claim can be deleted.

1. From the Claims menu, select **Claim Entry – Centers** or **Claim Entry - DCH**. The Claim Year Summary screen displays.

2. Select the desired Claim Month. The Claim Month Details screen displays.

3. If the Sponsor is performing Sponsor-level claiming, select **Modify.** The Claim for Reimbursement screen displays.

   If the Sponsor is performing site-level claiming, the Claim Site List screen displays. If you wish to delete a claim for only one of the sites, under Actions, select **Modify** to the left of the Site Name you wish to view. (If you wish to delete the entire claim, skip this step.) The Claim for Reimbursement screen displays.

4. Select **Delete** in the Edit menu in the upper-right corner.

5. The system transfers you to the bottom of the screen and a warning message is displayed.

6. Select the **Delete** button at the bottom of the page. A confirmation message displays.

7. Select **Finish**.

WARNING: Once the claim has been deleted, it is permanently removed from the application and cannot be restored. Use caution before deleting a claim.

Claim Rates

The system provides a screen to view claim for reimbursement rates by year. The rates displayed apply for the rate year defined at the top of the page. Meals are reimbursed based on the designated rate established by the USDA. Annually, the reimbursement rates are entered by authorized Child Nutrition Program staff through the Claim Rate Maintenance screens in the Maintenance and Configuration module.

To access Claim Rates

1. From the Claims menu, select **Claim Rates – Centers** or **Claim Rates - DCH**. The applicable Claim Rates screen displays.

2. Use the **Back** button to return to the Claims menu.

Claim Rates for CACFP

Federal Reimbursement Operating Rates - July 1, 2011 to June 30, 2012

Breakfast	Maximum Reimbursement		Lunch	Maximum Reimbursement		Supper	Maximum Reimbursement
Free	1.5100		Free	2.7700		Free	2.7700
Reduced	1.2100		Reduced	2.3700		Reduced	2.3700
Paid	0.2700		Paid	0.2600		Paid	0.2600
			CIL	0.2225		CIL	0.2225

Snack	Maximum Reimbursement		At Risk Snack	Maximum Reimbursement		At Risk Supper	Maximum Reimbursement
Free	0.7600		Free	0.7600		Free	2.7700
Reduced	0.3800						
Paid	0.0700						

Created By: Developer on: 8/15/2011 1:43:38 PM   Modified By: Developer on: 2/9/2012 2:42:21 PM

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Figure 54: Claim Rates for CACFP – Centers screen

TIP: The Claim Rates screen defaults to the designated program year identified at the top right of the screen. To view the claim rates for a previous year, see Selecting a Program Year.

Payment Summary

The Payment Summary screen provides a list of all payment batch schedules processed for the Sponsor for the selected program year. Each schedule number and process date represents payments that have been scheduled. Payments from payment batches are grouped by program and sorted by date.

To access Payment Summary

1. From the Claims menu, select **Payment Summary**. The Payment Summary List screen displays.

2. Use the **Back** button to return to the Claims menu.

Schedule Number	Processed Date	Warrant Issue Date	Earned Amount	Adjustments	Distribution Amount
11042101	04/21/2011		$ 26,316.00	$ 0.00	$ 26,316.00

Figure 55: Payment Summary List screen

To view a Payment Summary

1. From the Claims menu, select **Payment Summary**. The Payment Summary List screen displays.

2. Select the payment record you wish to view. The payment summary information displays for all payments included in the payment batch.

3. Select the **Back** button to return to the previous screen.

Schedule Number	Schedule Process Date	Federal Year	Fund Authority
1060032	06/20/2011	2010-2011	USDA - Federal Funds

Account Description	Month	Transaction Description	Amount
CACFP Meals			
	Oct 2010	Original Claim	$ 1,414.40
	Oct 2010	Distribution for Claim #1690	$ 1,414.40
CACFP Cash In Lieu			
	Oct 2010	Original Claim	$ 105.30
	Oct 2010	Distribution for Claim #1690	$ 105.30

Payment Schedule Summary

	Month		Amount
	Oct 2010	CACFP Meals	$ 1,414.40
	Oct 2010	CACFP Cash In Lieu	$ 105.30
		Total Payments	**$ 1,519.70**

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Figure 56: Payment Summary screen

Reports

Standard Reports for the Child and Adult Care Food Program are available to users through the Reports component.

About Reports

The Reports component of the CACFP module enables users to run, view, and print reports containing data maintained within the system. The Report List contains all reports available within the CACFP module. Once a user selects a particular report, the system may prompt the user for additional parameters information.

Access to Reports is generally provided to authorized State users to help review and manage statewide data. The Reports menu displays only reports to which the user has access.

To generate a report

1. On the blue menu bar, select **Reports**.

2. Select the report you wish to generate. The respective report's parameters screen will display.

3. Identify the reports parameters.

4. Select **Create Report.** The report is generated and displays in a new browser window.

> **TIP**: Use the Report Filter to filter the Reports list by selected Report Group. For example, to display only Claim-related reports, select Claim Reports from the drop-down list and select the **Apply Filter** button. The Reports list automatically refreshes.

> **Note:** The report will not open in a new window if you have a pop-up blocker running on your system. If this occurs, hold down the **CTRL** key and Select **Create Report** again.

Figure 57: Child and Adult Food Program Reports (Partial)

Report Parameters

Most reports require one or more parameters to be entered in order to customize the report to the user's specific needs. Report parameters are useful to also limit data contained in the report or control how the information is sorted or grouped. Below is an example of a report parameters screen.

Figure 58: Example of Report Parameter – Sponsor Contact Information Report

Report

Most CACFP reports automatically open in a new window using Microsoft Excel so that the user can manipulate and format the data as needed without assistance from a technical person. If a report is not generated automatically in Microsoft Excel (i.e., the report is s Microsoft Report Services reports) a window opens that allows the user to:

- View the report, page-by-page.

- Change the zoom percentage of the displayed report.

- Search the report using the "Find/Next" feature.

- Select to export the report data (see next section).

- Select to print the report or specific pages.

To export a report

If the report does not default to a Microsoft Excel format, the user can export the report in a variety of formats including: .XML, .CSV, .PDF, and Microsoft Excel.

1. In the top menu bar of the generated report, select a format in the **Select a format** box. The Export link becomes active.

2. Select **Export.**

3. The system will open a new window and display a pop-up confirmation asking if you would like to open or save the file.

4. Select either the **Open** or **Save** option.

5. Your desktop software will manage the opening or saving of the file.

6

Security

System-authenticated users (i.e., users that are logged on) may change their password through the Change Password feature.

Security menu

The Security menu option within the Child and Adult Care Food Program module is the access point to the Change Password and User Manager functions.

To access the Security menu

1. On the blue menu bar, select **Security.**

2. Select a security item to access that security function.

To access Change Password

1. On the blue menu bar, select **Security**.

2. On the Security menu, select **Change Password.** The Change Password screen displays.

3. Enter your **New Password**.

4. Re-Enter your New Password.

5. Select **Save**. A confirmation message displays.

6. Select **Edit** to return to the Change Password screen you just modified.
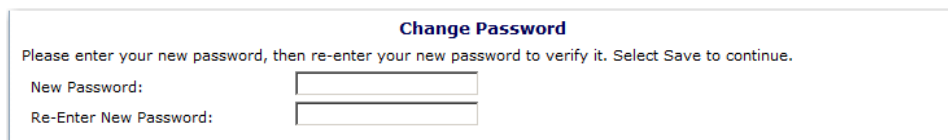   -OR-
    Select **Finish** to return to the Security menu.

Change Password

Please enter your new password, then re-enter your new password to verify it. Select Save to continue.

New Password:

Re-Enter New Password:

Figure 59: Change Password screen

Note: Security configuration settings require a password eight (8) characters in length. Please note that the password must be at <u>least</u> eight (8) characters in length. The password must contain at least one number, one uppercase, lowercase letter, and one special character (e.g., !, ?, /). Passwords are case sensitive.

User Manager

The User Manager allows authorized users to set up and maintain various components of a user's security access. The features within the User Manager enable you to add new users, set up and modify user profiles, change passwords, and set assigned groups, security rights and associated Sponsors.

To access User Manager

1. On the blue menu bar, select **Security**.

2. Select **User Manager**. The Search for User screen displays.

To search for a user

Before proceeding in the User Manager, you must always search for and select a user you wish to access. If you have already selected a user or are elsewhere in the application, return to the User Manager screen.

1. From the User Manager/Search for User Page, select the type of search on the **Search By** drop-down list. Enter the Last Name or User Name in the text box, and select **Search**.
—OR—
Select **All** to display a list of all users.
A list of users matching the search criteria displays.

Note: The names displayed are dependent on the user's type. The chart below describes how a user's type is denoted and which users will be displayed in the search for each type:		
User Type	**Denoted by**	**Users displayed**
Administrators	"Yes" in Administrator column	All
State Employees	Names and User IDs in bold	Non-administrators
Sponsor users	Non-bolded names; blank administrator column	Non-administrators

2. Select the User you wish to access. The User Options menu displays.

To add a new user

If you have already selected a user or are elsewhere in the application, return to the User Manager screen.

1. From the User Manager screen, select **Add New User**. The User Profile screen displays.

2. Enter the new user's information in the User Information section.

3. Enter the new user's login name and password.
Enter the password again for confirmation.
[The new user is required to create a new password upon first logging in.]

4. Use the buttons to select if the user is a state employee, an administrator, and if the user is to only be granted access to associated Sponsors.

5. Use the drop-down menu to select the user's status.

6. Select **Save**. A confirmation screen displays.

User's Profile

The User's Profile enables you to view and modify a user's basic information, login, security base, and status. In addition to name, contact, and login information, the user's profile specifies whether the user is a state employee, an administrator, and if the user is granted access to associated Sponsors only. These specifications affect which program functions the user may access. Furthermore, users specified as **Active** have access to all normal functions, while **Inactive** and **Locked** users are not permitted to login or access the system.

Note: Passwords cannot be changed within the user's profile. This function is accessed through the User Manager. For information regarding resetting passwords, see Reset User's Password.

To access User's Profile

1. On the blue menu bar, select **Security**.

2. Select **User Manager**. The Search for User screen displays.

3. On the **Search By** drop-down list, select the type of search, enter the Last Name or User Name in the text box, and then select **Search**.
   —OR—
   Select **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access. The User Options menu displays.

5. Select **User's Profile**. The User's Profile screen displays.

To view or modify a user's profile

1. Access the User's Profile you wish to view or modify through the User Manager.

6. Modify any desired information.

7. Select **Save**. A confirmation screen displays.

   Note: To make any modifications, **MODIFY** must be selected on the Edit menu in the top-right corner (see figure below).

To delete a User's Profile

 WARNING: Once a profile has been deleted, it cannot be restored. Use caution before deleting profiles.

1. On the blue menu bar, select **Security**.

2. Select **User Manager**. The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then Select **Search**.
   —OR—
   Select **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the **User** you wish to access. The User Options menu displays.

5. Select **User's Profile**. The User Profile screen displays.

6. On the Edit menu, Select **DELETE**. A warning displays.

7. Select **Delete**. A confirmation screen displays.

User's Assigned Group(s)

The User Assigned Group(s) enables you to assign a user to numerous pre-defined groups. Groups are created as a way to categorize multiple users together to provide identical security settings for the entire group. Changing any security setting for the group changes the setting for each member in that group.

To access User Assigned Group(s)

1. On the blue menu bar, select **Security**.

2. Select **User Manager**. The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then select **Search**.
   —OR—
   Select **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access. The User Options menu displays.

5. Select **User's Assigned Group(s)**. The User's Assigned Group(s) screen displays.

User's Assigned Group(s)

User Name: jsmith   **Name:** Jane Smith

Figure 60: User's Assigned Group(s) screen

To add a user to assigned group(s)

1. On the blue menu bar, select **Security**.

2. Select **User Manager**. The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then select **Search**.
    —OR—
    Select **All** to display a list of all users.
    A list of users matching the search criteria displays.

4. Select the User you wish to access. The User Options menu displays.

5. Select **User's Assigned Group(s)**. The User's Assigned Group(s) screen displays.

6. Select the group you want to add the user to on the **Available Group** list.

    > **Note:**   To make any modifications, **MODIFY** must be selected on the Edit menu.

TIP: You can easily select multiple groups two ways:

7. Select **Add.**

---

8. Select **OK** on the Message box that appears.

9. Select **Save**. A confirmation screen displays.

To remove a user from assigned group(s)

1. On the blue menu bar, select **Security**.

2. Select **User Manager**. The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then select **Search**.
   —OR—
   Select **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access. The User Options menu displays.
5. Select **User's Assigned Group(s)**. The User's Assigned Group(s) screen displays.

6. Select the group you want to remove the user from on the **Available Group** list.

TIP: You can easily select multiple groups two ways:

Available Group

| State Program |
| State Claims ONLY |
| State Accounting |
| Accounting |
| Web Arts |
| Guest |
| Test |
| SNP Sponsor - APPS |

Hold down the Shift key while clicking State Program and Test to select all contiguous groups.

Available Group

| State Claims ONLY |
| State Accounting |
| Accounting |
| Web Arts |
| Guest |
| Test |
| SNP Sponsor - APPS |
| SNP Sponsor - CLAIMS |

Hold down the Ctrl key while clicking each group to select all groups at one time.

Note: To make any modifications, **MODIFY** must be selected on the Edit menu.

7. Select **Remove**.

8. Select **OK** on the Message box that appears.

9. Select **Save**. A confirmation screen displays.

User's Security Rights

The User's Security Rights feature enables administrators to set security rights for an individual user. These rights determine the areas within the system's programs and modules the user is granted access.

When a user has assigned groups, the groups' default security settings will apply and display in the user's security rights. No more rights may be given to the user than are given to the group. However, administrators may deny user's specific rights through this feature. Users cannot modify their own security rights.

To access User's Security Rights

1. On the blue menu bar, select **Security**.

2. Select **User Manager**. The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then select **Search**.
   —OR—
   Select **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access. The User Options menu displays

5. Select **User's Security Rights**. The User's Security Rights screen displays.

User Security Rights

User Name: pnally   Name: Perry Nally

Security Rights Settings

CACFP			bottom
Allow	**Deny**		
◉	○	CACFP	
◉	○	Applications	
◉	○	Application Packet	
◉	○	Application Packet	
◉	○	Submit Application Packet for Approval	
◉	○	Withdraw Application Packet	
◉	○	Contracting Entity Application	
◉	○	Contracting Entity Application - Add New/Revision	
◉	○	Contracting Entity Application - View	
◉	○	Contracting Entity Application - Modify	
◉	○	Contracting Entity Application - Delete	
◉	○	Contracting Entity Application - History List	
◉	○	Site Application List	
◉	○	Add New Site Application	
◉	○	Site Application Add Existing Site List	
◉	○	Add New Site and Site Application	
◉	○	Site Application	
◉	○	Site Application - Add New/Revision	
◉	○	Site Application - View	
◉	○	Site Application - Modify	
◉	○	Site Application - Delete	

Figure 61: User's Security Rights screen (Partial)

To modify a user's security rights

1. On the blue menu bar, select **Security**.

2. Select **User Manager**. The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then select **Search**.
—OR—
Select **All** to display a list of all users.
A list of users matching the search criteria displays.

4. Select the User you wish to access. The User Options menu displays.

5. Select **User's Security Rights**. The User's Security Rights screen displays.

   Note: To make any modifications, **MODIFY** must be selected on the Edit menu.

6. Modify the desired information.

7. Select **Save**. A confirmation screen displays.

   Note: The security rights available to a user depend on the user's assigned groups. Only the security rights assigned to the user's assigned groups display in the user's security rights. If you wish to assign additional security rights to a user that are not displayed as options in the user's security rights, you will need to assign the user to the assigned group with the desired rights.

User's Associated Sponsors

The User's Associated Sponsors feature enables you to associate individual users to specific Sponsors. In order for users to have access to system functions for a Sponsor, such as claims access, users must be associated with the Sponsor. Similarly, users who should no longer have access to Sponsor functions need to have their Sponsor association removed.

Note: For security purposes, users can only view Sponsors to whom they are associated.

To access User's Associated Sponsors

1. On the blue menu bar, select **Security**.

2. Select **User Manager**. The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then select **Search**.
—OR—
Select **All** to display a list of all users.
A list of users matching the search criteria displays.

4. Select the User you wish to access. The User Options menu displays.

5. Select **User's Associated Sponsors**. The User's Associated Sponsors screen displays.

Associated Sponsors

Actions		Sponsor Name
Remove	94203	Apple Tree Learning Center

[< Back] [Add Sponsors]

Figure 62: User's Associated Sponsors screen

To add a Sponsor association

1. On the blue menu bar, select **Security**.

2. Select **User Manager**. The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then Select **Search**.
   —OR—
   Select **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access. The User Options menu displays.

5. Select **User's Associated Sponsors**. The User's Associated Sponsors screen displays.

6. Select **Add Sponsor**. The Add User's Associated Sponsors screen displays.

7. Enter the **Agreement Number** or the **Sponsor Name**, and then Select **Search**.
   —OR—
   Select **All** to display a list of all Sponsors.
   A list of users matching the search criteria displays.

8. Select **Add Association** to the left of the Sponsor you want to associate with the User.
   A confirmation message displays.

9. Select **Finish**. The User's Associated Sponsor screen displays with the newly added Sponsor on the list.

To remove a Sponsor association

1. On the blue menu bar, select **Security**.

2. Select **User Manager**. The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then Select **Search**.
   —OR—
   Select **All** to display a list of all users.
   A list of users matching the search criteria displays.

4. Select the User you wish to access. The User Options menu displays.

5. Select **User's Associated Sponsors**. The User's Associated Sponsors screen displays.

6. Select **Remove** to the left of the Sponsor you want to remove.
   A confirmation message displays.

CHILD AND ADULT CARE FOOD PROGRAM USER MANUAL

Reset User's Password

The Reset User's Password enables you to reset a user's password required to login to the system.

Note: Passwords can be reset for user's who have forgotten their passwords. If a user attempts to log in with an incorrect password, a Login Error will display. The user will be temporarily locked out of the system after five unsuccessful login attempts Remember, passwords are case-sensitive.

To reset a User's Password

1. On the menu bar, select **Security**.

2. Select **User Manager**. The Search for User screen displays.

3. On the **Search By** drop-down list, select **Last Name** or **User Name**, enter all or part of the Name in the text box, and then Select **Search**.
    —OR—
    Select **All** to display a list of all users.
    A list of users matching the search criteria displays.

4. Select the User you wish to access. The User Options menu displays.

5. Select **Reset User's Password**. The Reset User's Password screen displays.

6. Enter the New Password.

    Note: Default settings require a password to be at least eight characters in length, containing one or more numbers. However, these settings can be changed by state administrators within the Configuration module.

    TIP: Strong, secure passwords contain eight characters, including numbers, upper-case, lower-case letters, and a special character.

7. Confirm the New Password.

8. Select **Save**. A confirmation screen displays.

Figure 63: Reset User's Password screen

Application Packet Process

7

This section of the manual provides information on how the State can review and approve CACFP Application Packets through the system.

Note: For security purposes, users can only view Sponsors to whom they are associated.

Submitting a CACFP Application Packet

All new enrollment or renewal enrollment applications are initially created with a status of "Pending Validation". Once the Application has been saved, the systems validates the business rules and the application's status is set by the system to either "Error" (if any errors exist) or "Not Submitted" (no errors, but the Application Packet has not been submitted).

Only complete Application Packets that have no errors can be submitted to the State. To submit a completed Application Packet, the Sponsor would select the **Submit for Approval** button. This simulates sending a completed Application Packet in the mail. Application items are placed in a view-only mode for the Sponsor.

An Application Packet can be submitted to the State (i.e., the **Submit for Approval** button is enabled) only if the following conditions have been met:

For Center and Provider Sponsors:

- The Sponsor Application must contain no errors.
- Centers only: At least <u>one</u> Site Application must exist and contain no errors.
- FDCH only: At least <u>one</u> Provider Application must exist and contain no errors.
- A Board of Directors Members List must exist and contain no errors for all nonprofit institutions.
  - had not enrolled in the Child and Adult Care Food Program in the previous year (i.e., "new" application)

- A Budget must exist and contain no errors.
- A Management Plan must exist and contain no errors.
- All items in the Checklist must be submitted (submitted checkbox checked and date submitted is entered).
- The Sponsor is not closed.

Note: The Civil Rights Information form is due by October 31st, but is not required when initially submitting the application packet for approval.

Once the Sponsor has submitted the Application Packet, the State will review each item in the submitted Application Packet. The State may approve each application item, deny an application item, or return the application item and its respective Application Packet back to the Sponsor for correction.
If the Application Packet is denied or returned to the Sponsor for correction, the State will provide comments within the respective Application Packet item as to why the application was denied or what needs to be corrected in order to re-submit the Application Packet.

Reviewing a CACFP Application Packet

Once a Sponsor's Application Packet has been submitted, it must be reviewed by an authorized State user. The State must review each item included in the Application Packet and set each item's status to "Approved". This includes each checklist item.

To identify which Application Packets have been submitted, State users can use the Sponsor Search screen by performing a search where Packet Status is "Submitted for Approval.

Figure 64: CACFP Sponsor Search – Packet Status example

After locating a submitted Application Packet via the Search screen, the State user should follow the following steps:

1. Assign the Application Packet to a State consultant (this may be yourself). For additional information, see the *Assign an Application Packet* section.

2. Review each submitted site/provider application.

   o Select the Admin option next to the site application item.

   o Review the application.

   o Update the Internal Use Only section of each site application.

   o Enter Internal Comments and Comments to Sponsor, if desired.

   o Update the application status.

      ▪ If the application has no issues, change the status to "Approved".

         • Returning to the Site List screen, you will notice that the application status is "Approved" and there is a green checkmark next to the packet item.

      ▪ If the application requires additional information or corrections from the Sponsor, change the status to "Returned for Correction".

         • Ensure that you have provided information as to what needs to be corrected within the Comments to Sponsor field.

         • Returning to the Site List screen, you will notice that the application status is "Returned for Correction".

      ▪ If the application is not valid for submission, change the status to "Denied".

         • Ensure that you have provided information as to the reason for denial within the Comments to Sponsor field.

- Returning to the Site List screen, you will notice that the application status is "Denied".
  - If the Sponsor has requested to withdraw the application, change the status to "Withdrawn".
    - Ensure that you have entered information as to the reason for the withdrawal within the Comments to Sponsor field.
    - Returning to the Site List screen, you will notice that the application status is "Withdrawn".

3. Review the Sponsor Application.

   o Select the Admin option next to the Sponsor Application item.

   o Review the application.

   o Update the Internal Use Only section of the application.

   o Enter Internal Comments, if desired.

   o Update the application status.

     - If the application has no issues, change the status to "Approved".
       - Returning to the Application Packet screen, you will notice that the application status is "Approved" and there is a green checkmark next to the packet item.
     - If the application requires additional information or corrections from the Sponsor, change the status to "Returned for Correction".
       - Ensure that you have provided information as to what needs to be corrected within the Comments to Sponsor field.
       - Returning to the Application Packet screen, you will notice that the application status is "Returned for Correction".
     - If the application is not valid for submission, change the status to "Denied".
       - Ensure that you have provided information as to the reason for denial within the Comments to Sponsor field.
       - Returning to the Application Packet screen, you will notice that the application status is "Denied".
     - If the Sponsor has requested to withdraw the application, change the status to "Withdrawn".
       - Ensure that you have entered information as to the reason for the withdrawal within the Comments to Sponsor field.
       - Returning to the Application Packet screen, you will notice that the application status is "Withdrawn".

4. Review the submitted Civil Rights Information.

5. Review the submitted Board of Directors, if applicable.

6. Review the submitted Budget Detail.

7. Review the submitted Management Plan.

8. Review the Checklist items (if applicable).

- o Select the **Details** option next to Checklist Summary. The Checklist Summary is displayed.

- o Select each checklist item for the Sponsor and each site.

- o Select **INTERNAL USE ONLY** from the top right of the screen.

- o For each checklist item received and reviewed, identify that the items was received and change the status to "Approved".

  - Returning to the Application Packet screen, you will notice that there is a green checkmark next to the Checklist Summary packet item.

Note: If the Sponsor organization submits a Revised Application, which occurs when a Sponsor makes any changes to an Application Packet that has already been approved, the original packet's status automatically changes to **Not Submitted.** The State is required to perform all of the steps identified above for the revised items in the Application Packet.

Approving a CACFP Application Packet

For <u>new</u> Sponsors (Centers and Day Care Homes), <u>all</u> original forms must be reviewed. Once the State has reviewed each Application Packet item and has identified each item as "Approved", the State can now approve the Application Packet.

Once the Approve button is selected, the Application Packet status is set to "Approved" and the Sponsor can begin submitting claims for reimbursement based on the approved Application Packet's data.

Once the **Approve** button is selected, the Sponsor can begin submitting claims for reimbursement.

Note: If the Sponsor submits a Revised Application, which occurs when a Sponsor makes any changes to an "Approved" Application Packet (except a Provider Application), the packet's status automatically changes to "Not Submitted". The State is required to perform all of the steps identified above for the revised Application Packet. Changes to Provider Applications do not affect a packet's status.

Application Packet Statuses

Statuses are used to manage the workflow of the Application Packet. Each packet can have only one status at a time.

- o Not Submitted
    - ▪ The packet has a status of "Not Submitted" when the packet is created for the first time or when any of the packet items are created, revised, or modified, but the Application Packet has not been submitted to the State.

- o Submitted
    - ▪ The packet has a status of "Submitted" when the Sponsor uses the **Submit for Approval** button on the Application Packet screen to submit the error-free packet to the State for review.
    - ▪ If the packet status is "Submitted", the entire packet becomes read-only to the Sponsor.
    - ▪ All applications that are "Submitted" must ultimately be "Approved", "Denied", or "Returned for Correction" or "Withdrawn".

- o Approval Recommended (i.e., First Level Approved)
    - ▪ When a Sponsor is new to the program, the system will require two levels of approval. This status represents the first level of approval performed by the State before a final approval is granted.
    - ▪ The Application Packet screen will display the **First Approval** button when the first level approval is required. After the button has been selected, this button will not display; however, the **Approve** button will be displayed.

- o Approved
    - ▪ The packet has a status of "Approved" when the State has approved each packet item AND has selected the **Approve** button on the Application Packet screen.

- o Denied
    - ▪ The packet has a status of "Denied" when the State selects the **Deny** button on the Application Packet screen.
    - ▪ When a packet is "Denied", the packet remains view-only and nothing in the packet can be modified. The only way to edit items in a denied packet is for the State to change the status of the packet to something other than "Denied".
    - ▪ By denying an Application Packet, the status of all items within the packet is automatically set to "Denied".
    - ▪ An "Approved" packet cannot be "Denied".

- o Returned for Corrections
    - ▪ The packet has a status of "Returned for Corrections" when the State selects the **Return** button on the Application Packet screen.
    - ▪ This status unlocks the packet for the Sponsor and sets the status back to "Not Submitted".
    - ▪ An "Approved" packet cannot be "Returned for Corrections".

- o Withdrawn

- The packet has a status of "Withdrawn" when the Sponsor or State selects the **Withdraw** button on the Application Packet screen.

- An Application Packet with a status of "First Level Approved" can be withdrawn.

- An Application Packet with a status of "Approved" packet cannot be "Withdrawn". If an application has been "Approved", it can only be "Cancelled" or "Terminated" by the State (see *Application Packet* section).

Application Statuses

Statuses are used to define the current state of an application packet item. Each application can have only one status at a time.

o Pending Validation

- The application has a status of "Pending Validation" when the application has not yet been opened or saved.

o Error

- The application has a status of "Error" if it has failed system validation rules. Data entered is maintained.

o Not Submitted

- The application has a status of "Not Submitted" when the application is saved without error, but the Application Packet has not been submitted to the State.

o Submitted

- The application has a status of "Submitted" when the Sponsor has submitted the Application Packet to the State for review (i.e., the Sponsor has selected the **Submit for Approval** button).

- Any application that is marked "Not Submitted" is changed to "Submitted"

- The Application Packet becomes read-only to Sponsor users.

o Approved

- The application has a status of "Approved" when the State has approved the application (i.e., the State selected "Approved" in the Internal Use Only section of the form).

o Denied

- The application has a status of "Denied" when the State has denied the application (i.e., the State selected "Denied" in the Internal Use Only section of the form).

- If the application is "Denied", it can no longer be modified by the Sponsor. Only the State can change the status of the application.

- When setting the application status to "Denied", the State should enter a comment in the Comments to Sponsor field explaining the reason the application was denied.

o Incomplete

- The Board of Directors has a status of "Incomplete" when the data has been rolled over from the previous program year and the State is reviewing the Application Packet for a Base Year

Renewal. In order to approve the Application Packet, the reviewing Child Nutrition Program user needs to indicate that the Board of Directors has been reviewed.

o Returned for Correction

- The application has a status of "Returned for Correction" when the State has identified errors in the application and has selected "Returned for Correction" in the Internal Use Only section of the form.

- When setting the application status to "Returned for Correction", the State should enter a comment in the Comments to Sponsor field explaining the reason the application was returned.

o Withdrawn

- The application has a status of "Withdrawn" when the State has selected "Withdrawn" in the Internal Use Only section of the form.

- If the Application Packet has ever been approved, there will not be an option to withdraw.

Claim Statuses

Statuses are used to define the current state of a claim. Each claim can have only one status at a time.

o Not Eligible

- The claim has a status of "Not Eligible" when there is an application condition that is preventing claiming for the selected month (e.g., Sponsor or site is not authorized on the Application Packet to operate for the selected month or the Application Packet status is not "Approved").

o Incomplete

- The claim has a status of "Incomplete" when the claim has been created in the system but the **Save** button was never clicked (e.g., timeout, logout, etc.). The system saves the data that has been entered, but no edits have been performed.

o Error

- The claim has a status of "Error" when the claim has been submitted and has business rule violations.

o Pending

- The claim has a status of "Pending" when the claim has been saved and on-line edits have been performed, but the claim has not been submitted and validated with additional edits (e.g., 60 days edit, etc.).

- Applicable only when the Sponsor is participating in Sponsor-level claiming.

o Validated

- This site claim has a status of "Validated" when the site claim has been entered, validated, and contains no errors.

- Applicable only when the Sponsor is participating in site-level claiming.

o Accepted

- The claim has a status of "Accepted" when the claim has passed all on-line edits and additional edits (e.g., 60 days edit, etc.), and is ready to be included in the payment tracking process.

- The claim can still be modified. A revision is not necessary until the claim is included by the State in a batch payment process.

o Accepted*

- The claim has a status of "Accepted*" when the claim has been selected by the State for inclusion in the batch payment process; however, the batch process has not run.

- The claim cannot be modified. If the claim requires a change, a revised claim must be submitted.

o Processed

- Claim has been fully processed by Child Nutrition Program and has been sent to the State's Accounting Office for disbursement of funds.