COLYAR CONSULTING GROUP, INC.

Child Nutrition Programs

School Nutrition Programs
User Manual

Nebraska Department of Education

Nutrition Services

For Sponsor Users

TABLE OF CONTENTS

SCHOOL NUTRITION PROGRAMS USER MANUAL

TABLE OF FIGURES

SCHOOL NUTRITION PROGRAMS USER MANUAL

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

This system is a user-friendly web application that allows authorized state agency personnel and Sponsors to submit and approve application, claims, and miscellaneous forms 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 Sponsor users that participate in the School Nutrition Programs. 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.

Getting Started

Before you can begin using the system, you must be assigned a user ID and password that provides the required security rights. Once this setup is complete, you may use the Internet and your assigned user ID and password to access and log onto the 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 NDE 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 Nutrition Services.

TIP: The Password is case-sensitive, so be sure to use upper and lowercase letters, one number and one 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 Programs page.

Content Overview

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

Figure 2: 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 Nutrition Services 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.
School Year	The selected school year displays on the right beneath the menu bar. Upon logging in, the system defaults to the most current active school year.
Information Box	The information box displays general information regarding the Sponsor/Site.
Logout	The logout button displays in the menu bar. It is recommended to select **Logout** to properly exit the system.

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.

Programs Page

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

> **TIP:** Tiles only display if the State has indicated that your Sponsor participates in the program. If your Sponsor only participates in the School Nutrition Programs, this screen will not display and you will go directly to the School Nutrition Programs home page.

Figure 4: Programs Page

Selecting this button…	Provides…
School Nutrition Programs	Access to the School Nutrition Programs home page
Child and Adult Care Food Program	Access to the Child and Adult Care Food Program home page
Summer Food Service Program	Access to the Summer Food Service Program home page

School Nutrition Programs Home Page

The School Nutrition Programs home page contains the message board used by state administrators to post and maintain School Nutrition Programs-related messages. Messages may contain important news regarding the submission due dates, upcoming training, legislative changes, or any other SNP-specific information.

To access the School Nutrition Programs home page

1. Log on to the web site.

2. On the Programs screen, select **School Nutrition Programs**.

Note: If a user only has access to the School Nutrition Programs module, the Programs

3. The School Nutrition Programs home page displays.

Note: State administrators maintain the message boards for all modules. If you would like a message posted on the School Nutrition Programs home page, please contact Nutrition Services. Please note that messages are visible to both internal and external users.

Figure 5: School Nutrition Programs Home Page

School Nutrition Programs menu options

From the School Nutrition Programs home page, you can select a menu item from the blue menu bar at the top of the page. The School Nutrition Programs menu bar contains menu items specific to the School Nutrition Programs. 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 Manager (State users only). ▪ Application Packet (inc. Sponsor, SNP and FFVP applications). ▪ Verification Reports. ▪ Food Safety Inspections. ▪ Financial Report. ▪ Fresh Fruit and Vegetable Grants.
Claims	Access to claim entry screens (e.g., SNP and FFVP) and Sponsor-specific payment history.

Menu Item	Menu Features
Security	Access to an individual user's security-related items including: ▪ My Account (authenticated user changing their password). ▪ User Manager.
Search	Access to the Sponsor Search screen (State users and Sponsor users with access to more than one Sponsor.).

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 must be corrected before you can proceed. The system will not save data entered on a screen that contains an input error. The user must correct the input errors and select **Save** again.

Figure 6: Example 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, the system will perform business rule edit checks after 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 do not 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.

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 Nutrition Services.

Selecting a School Year

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

Note: A Sponsor will be unable to select a new year if they have not been granted the security right. Contact Nutrition Services and request access to the **Select Year** security right if you think this is in error.

To select a school year

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

2. Select the year.

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

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

Year Select
Select Year
2011 - 2012
2010 - 2011 **< Selected**
2009 - 2010
2008 - 2009

Figure 9: Year Select screen

Sponsor Search

For most School Nutrition Programs 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 Agreement Number, Sponsor Name, or any other combination of parameters provided on this screen.

To search for a Sponsor

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

SNP Sponsor Search

Search for Sponsors

Agreement Number:	[_____]	Packet Status:	[_____ ▼]
Sponsor Name:	[_____]	Field Service Rep:	[____ ▼]
FEIN:	[_____]	Packet Assigned To:	[_____ ▼]
County:	[_____ ▼]	Region:	[_____ ▼]
		Program Status:	[_____ ▼]
Sponsor Status:	Active ▼		

[Search]

Figure 10: Sponsor Search screen

> **Note:** Users will only see Sponsors associated with their user account.

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**	"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

Parameter	Type of Search	Search Features
Packet Assigned To **Region** **Program Status**		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

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 School Nutrition Programs module. Let's first look at the Applications component, where users manage yearly enrollment of Sponsors and sites and complete the appropriate forms required by the NDE.

About the School Year Enrollment Process

In order to participate in the School Nutrition Programs, Sponsors must submit an Application Packet to the State for review and approval. Before beginning the Application Packet, Sponsors must select the "Enroll" button on the Application Packet screen and click "Yes" on the subsequent confirmation screen. After a Sponsor is enrolled, they must complete all required applications and forms in the Application Packet for the school year.

The Sponsor has not started in the current year (2012).

Click '**Enroll**' to enroll for this year based on your prior year's information.

Enroll Cancel

Figure 11: Enrolling in a New Program Year

A new Application Packet must be submitted and approved at the beginning of each year. For Sponsors that are completing this process as part of their "annual update," certain information from the previous year's applications rolls over into the new program year. The Sponsor may modify this data for the new program year or leave the data as it is presented (and as was recorded in the previous year).

Submitting an Application Packet

The Sponsor can submit the Application Packet to the State once all required applications, online forms (e.g., Food Service Management Company contract), and supporting documents identified on the checklist are completed and saved without errors.

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 SNP Site Application with no errors.

- All items in the Checklist are identified as submitted to NDE.

- If the Sponsor had identified that they would be using a Food Safety Management Company on their Sponsor Application, the packet must contain at least one Food Service Management Company contract with a status of "Submitted".

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 approved.	5/29/2009 7:23:11 AM	Developer
The application packet was submitted.	5/29/2009 7:22:27 AM	Developer
The application packet was changed requiring it to be submitted.	5/29/2009 7:22:14 AM	Developer

Figure 12: 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 School Nutrition Programs 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.

Item	Description
Sponsor Manager	SNP Sponsor's Profile, Site and Hold Information
Application Packet	Applications Forms (Sponsor and Site)
Verification Report	Mandatory Annual Verification Report
Food Safety Inspections	Number of Food Safety Inspections by Site
Financial Report	School Food Annual Revenues and Expenditures Report
FFVP Grant Overview	Fresh Fruit and Vegetable Program Grant Information by Site Overview

Figure 13: Applications Menu screen

Sponsor Manager Menu

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

To access the Sponsor Manager Menu

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

2. From the Applications menu, select **Sponsor Manager**. If a Sponsor has already been selected, the Sponsor Manager Menu screen displays.

Item	Description
Sponsor Profile	Specific information for the Sponsor.
Site Manager	Site List and Site Options for the Sponsor.

Figure 14: Sponsor Manager Menu screen

The following table describes the features available from the Sponsor Manager 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

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.

To view a Sponsor profile

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

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

3. Select **Back** when finished. **Save**.

Sponsor Profile

Sponsor Information

Agreement Number:	55-1011
Sponsor Name:	Jefferson Unified School District
Type of Agency:	Public School
FEIN:	123
Region:	Northeast Region
County:	Blaine (005)
Congressional District:	222
DUNS Number:	912345678
Address Book Number:	44
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:	AA
Direct Deposit:	○ Yes ◉ No
Field Service Representative:	
SNP Specialist:	
SNP Consultant:	

Figure 15: Sponsor Profile screen (partial)

Site Manager

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

To access Site Manager

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

2. On the Applications menu, select **Sponsor Manager.**

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

To view or modify a Site Profile

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

2. Select **Site Manager.** The Sponsor Site Manager displays.

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

Site Profile

Site Information

Site ID: 0001

Site Name: Jefferson Elementary

County: Jefferson (048)

Program Participation

Site will operate in the following programs:
☑ SNP ☐ SSO ☑ SFSP ☐ CACFP

Status

Site Status: Active

Created By: Developer on: 3/21/2012 9:07:25 AM   Modified By: Developer on: 3/23/2012 12:57:49 PM

Save Cancel

Figure 16: Site Profile screen

4. Modify any desired information within the profile.

5. Select **Save**. A 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.

To delete a Sponsor site

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

2. 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.

Application Packet

In order to participate in the School Nutrition Programs (SNP), 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 Application Packet contains the Sponsor application, site application(s), and other forms required as a part of the packet. After selecting Application Packet from the Applications menu, each required packet item and its status displays. If any packet item requires attention (such as an error within a form or a checklist item needs to be completed), a red arrow displays next to the Application Packet item. If the Application Packet item has been completed correctly and contains no errors, a green check displays next to the Application Packet item.

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, when a Sponsor revises <u>any</u> item within the Application Packet, the Application Packet must be re-submitted for approval.

To access the Application Packet

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

2. From the Applications menu, select **Application Packet**.

Currently, there are 3 School Year(s) available. Select the year you wish to access.

School Year	Date Range	Application Packet
2012 - 2013	07/01/2012 - 06/30/2013	Not Started
2011 - 2012	07/01/2011 - 06/30/2012	Application Packet on File
2010 - 2011	07/01/2010 - 06/30/2011	Not Started

Figure 17: Select School Year screen

3. Select the desired School Year for the packet. The Application Packet screen displays.

4. Select the packet item you want to access.

Action	Form Name	Latest Version	Status
View | Modify	➡ Sponsor Application	Original	Error
Details	✔ FSMC Contract List		1 Contract
Add	➡ Fresh Fruit And Vegetable Program Application		Not Started
Details	✔ Checklist Summary (5)		
Details	Attachment List (1)		

Site Applications	Approved	Pending	Return for Correction	Denied	Withdrawn/ Closed	Error	Total Applications
School Nutrition Program	0	1	0	0	0	1	2

Figure 18: Application Packet screen

Sponsor Application

The Sponsor Application screen provides access to the Sponsor's annual application for the School Nutrition Programs for both new and renewing Sponsors. The Sponsor is required to complete a new Sponsor application annually; however, **the State has identified** select Sponsor 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**. The current year's Application Packet screen displays.

3. Select View next to the **Sponsor Application** packet item. The Sponsor Application for the designated school 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**. 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 school 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**. 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 school 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**. 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 school 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**. 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 school 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 school 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 <u>any</u> item within the Application Packet, 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**. 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 school 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 Applications – School Nutrition Program

Sponsors must complete a Site Application for each of their sites. The Site Application screen provides access to the Site's annual application for the School Nutrition Programs for both new and renewing sites. Sites must complete a new application annually; however, **the State has identified** select site 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**. The most current year's Application Packet screen displays.

3. Under Site Applications, select **School Nutrition Program**. The Application Packet - SNP Site List screen displays.

Action	Site ID / Site Name	NSLP	REG BRK	SN BRK	NAE SNK	AE SNK	SMP	FFVP	Version/ Status	% Enroll Free/Redc Oct 2010
	Totals	2	2	0	2	0	1	0		
View | Modify ➡	0001 Jefferson Elementary	X	X		X		X		Original / Pending Validation	0.0000
View | Modify ➡	0002 Jefferson High School	X	X		X				Original / Error (22)	0.0000
Add Site Application										

Total Sites Enrolled: 2

Figure 19: Application Packet – SNP Site List screen

To add a new site (for Sponsors)

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

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

3. Under Site Applications, select **School Nutrition Program**. The Application Packet - SNP Site List screen displays.

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

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.** The 'Quick' Site Profile screen displays.

6. The system automatically defaults the Site ID to the next available ID for this Sponsor.

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. Enter the Site Name and County.

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

Site Information

Site ID:	0003
Site Name:	
County:	▼

Figure 20: '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**. The current year's Application Packet screen displays.

3. Under Site Applications, select **School Nutrition Program**. The Application Packet - SNP Site List screen 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**. The current year's Application Packet screen displays.

3. Under Site Applications, select **School Nutrition Program**. The Application Packet - SNP Site List screen displays.

4. Select Modify next to the site whose application you would like to view. The site's 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 SNP 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**. The current year's Application Packet screen displays.

3. Under Site Applications, select **School Nutrition Program**. The Application Packet - SNP Site List screen displays.

4. Select Modify next to the site whose application you would like to delete. The site's 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. Once a Sponsor revises any item within the Application Packet, 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**. The current year's Application Packet screen displays.

3. Under Site Applications, select **School Nutrition Program**. The Application Packet - SNP Site List screen displays.

4. Select Revise next to the site whose application you would like to delete. The site's 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 SNP Site List screen.

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

Food Service Management Company (FSMC) Contract List

If the Sponsor's School Nutrition Programs is managed by a Food Service Management Company (FSMC), then information regarding the FSMC contract is **required** as a part of the Application Packet. The FSMC Application Packet item is initiated when the Sponsor has specified that they will be using a FSMC on their Sponsor application. If the Sponsor has not specified that they will be using a FSMC for the respective year, the FSMC Contract List will not appear on the Application Packet screen.

To access the Food Service Management Company Contract List

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

2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.

3. Select **Details** next to **FSMC Contract List**. The Food Service Management Company Contracts screen displays.

Action	Company Name	Initial Year	Final Year	Status
View | Modify	Test Kitchen	2011-2012	2013-2014	Pending Approval

< Back   Create New Contract

Figure 21: Food Service Management Company Contracts screen

To add a Food Service Management Company contract

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

2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.

3. Select **Details** next to **FSMC Contract List**. The Food Service Management Company Contracts list screen displays.

4. Select the **Create New Contract** button. The Food Service Management Company Contract for the specified year is displayed.

5. Select the company. The Company Contact Information is automatically populated.

6. Enter additional contract information.

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

8. Select **Edit** to return to the Food Service Management Company Contract screen.
-OR-
Select **Finish** to return to the Food Service Management Company Contracts list screen.

To modify a Food Service Management Company contract

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

2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.

3. Select **Details** next to **FSMC Contract List**. The Food Service Management Company Contracts list screen displays.

4. Select **Modify** next to the company you want to modify.

5. Modify any desired information.

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

7. Select **Edit** to return to the Food Service Management Company Contract screen.
-OR-
Select **Finish** to return to the Food Service Management Company Contracts list screen.

WARNING: Contract information can be modified only until the State has approved the FSMC contract. Once the FSMC contract has been approved the user would only use the Modify option to early terminate or cancel the FSMC contract.

To delete a Food Service Management Company contract

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

2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.

3. Select **Details** next to **FSMC Contract List**. The Food Service Management Company Contracts list screen displays.

4. Select **Modify** next to the company you would like to delete. The Food Service Management Company Contract screen 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 contract who's Application Packet has not been approved can be deleted. Once the contract has been deleted, it is permanently removed and cannot be restored. Use caution before deleting a contract.

To early terminate an active Food Service Management Company contract

TIP: Within the system, Food Service Management Company contracts automatically renew based on the number of optional renewal years specified on the Food Service Management Company Contract screen. To end a contract mid-year, use the Early Termination section of the form.

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

2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.

3. Select **Details** next to **FSMC Contract List**. The Food Service Management Company Contracts list screen displays.

4. Select **Modify** next to the company you want to modify.

5. Under the Early Termination Information section, identify that you are terminating the contract early and enter the date and reason for early termination.

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

7. Select **Edit** to return to the Food Service Management Company Contract screen. -OR-
    Select **Finish** to return to the Food Service Management Company Contracts list screen.

Figure 22: Food Service Management Company Contracts screen (partial) - Termination

To cancel a renewing Food Service Management Company contract

TIP: Within the system, Food Service Management Company contracts automatically renew based on the number of years specified on the Food Service Management Company Contract screen. Only contracts in a renewal year can be cancelled. This option is not available in the initial year.

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

2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.

3. Select **Details** next to **FSMC Contract List**. The Food Service Management Company Contracts list screen displays.

4. Select **Modify** next to the company you want to modify.

5. Under the Cancellation of Renewal Years section, check the box identifying that you are cancelling future renewals with this Food Service Management Company.

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

7. Select **Edit** to return to the Food Service Management Company Contract screen.
    -OR-
    Select **Finish** to return to the Food Service Management Company Contracts list screen.

Cancellation of Renewal Years

11. ☐ This Food Service Management Company contract will not be renewed for the upcoming school year 2011-2012.

Figure 23: Food Service Management Company Contracts screen (partial) - Cancellation

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**. The Application Packet screen displays.

3. Select **Checklist Summary**. The Checklist Summary screen displays.

Sponsor	Total Items	Submitted Items	Approved Items
Jefferson Unified School District	5	0	0

School Nutrition Programs Sites	Total Items	Submitted Items	Approved Items
Jefferson Elementary	0	0	0
Jefferson High School	0	0	0

Figure 24: Checklist Summary screen

To view a Checklist

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

2. On the menu, select **Application Packet**. The Application Packet screen displays.

3. Select **Checklist Summary**. 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
Civil Rights Document	📎	☐		☐	Pending Approval	07/05/2012	Developer
Food Service Management Company Contract	📎	☐		☐	Pending Approval	07/05/2012	Developer
Documentation of FTIN number	📎	☐		☐	Pending Approval	07/05/2012	Developer
Contract for Receiving Meals from Vendor	📎	☐		☐	Pending Approval	07/05/2012	Developer
Contract for Receiving Meals from School	📎	☐		☐	Pending Approval	07/05/2012	Developer

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

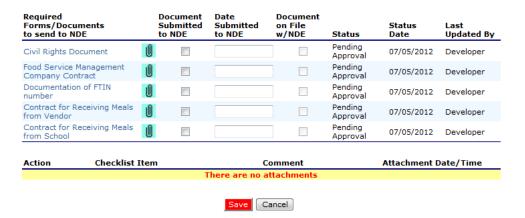Save   Cancel

Figure 25: Checklist screen

To update a Checklist

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

2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.

3. Select **Checklist Summary**. 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 to NDE.

6. Select Save. The Checklist Summary screen displays.

To upload an attachment to a Checklist item

Note: If the checklist item has a paper clip icon next to it, you can upload an attachment. Files in the following formats can be uploaded: .doc, .xls, .pdf, and .jpg.

1. Select the paper clip. The Checklist File Upload Details screen displays.

2. Use the **Browse** button to select the file to upload. If desired, enter a brief comment (field is not required)

3. Select **Save**.

Checklist File Upload Detail

Checklist

Program:	School Nutrition Programs
Checklist Item:	Civil Rights Document

Upload Detail

1.	File To Upload:	[ ] Browse...
2.	Comment:	[ ]

Figure 26: Checklist File Upload Detail screen

Fresh Fruit and Vegetable Program Application

Sponsors invited by the State to participate in the Fresh Fruit and Vegetable Program (FFVP) must complete a Fresh Fruit and Vegetable Program Application. The Fresh Fruit and Vegetable Program Application is accessed from the Application Packet screen; however, it can be submitted outside of the Application Packet.

Note: Only Sponsors invited by the State to participate in the Fresh Fruit and Vegetable Program will see a Fresh Fruit and Vegetable Program Application item on their Application Packet screen.

To access and view a Fresh Fruit and Vegetable Program application

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

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

3. Select View next to the **Fresh Fruit and Vegetable Application** packet item. The Fresh Fruit and Vegetable Program Application for the designated school year is displayed.

To add a Fresh Fruit and Vegetable Program application

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

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

3. Select Add next to the **Fresh Fruit and Vegetable Application** packet item. The Fresh Fruit and Vegetable Program Application for the designated school year is displayed.

4. Enter the Sponsor's Contact Information and select from the invited sites those that are interested in participating in the Fresh Fruit and Vegetable Program.

   Note: Only the sites that the State has invited to participate in the Fresh Fruit and Vegetable Program will display on the screen; this may be a subset of all the sites associated with the Sponsor.

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

6. Select **Edit** to return to the Fresh Fruit and Vegetable Program Application screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

Action	Form Name	Latest Version	Status
View | Modify	➡ Sponsor Application	Original	Error
Details	✔ FSMC Contract List		1 Contract
Add	➡ Fresh Fruit And Vegetable Program Application		Not Started
Details	✔ Checklist Summary (5)		
Details	Attachment List (1)		

Figure 27: Application Packet screen – Fresh Fruit and Vegetable Program Application option

To modify a Fresh Fruit and Vegetable Program application

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

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

3. Select Modify next to the Fresh Fruit and Vegetable Program Application packet item. The Fresh Fruit and Vegetable Program Application for the designated school year is displayed.

4. Update desired information.

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

6. Select **Edit** to return to the Fresh Fruit and Vegetable Program Application screen.
-OR-
Select **Finish** to return to the Application Packet screen.

> **Note:** The application is automatically submitted when all required fields have been completed without errors and the user selects the **Save** button. If you do not correct the errors, the form status is "Error".

To delete a Fresh Fruit and Vegetable Program application

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

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

3. Select **Modify** next to the **Fresh Fruit and Vegetable Program Application** packet item. The Fresh Fruit and Vegetable Program Application for the designated school 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.

7. Select **Finish**.

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

Fresh Fruit and Vegetable Program Grant Overview

To view all Fresh Fruit and Vegetable Program grants, the user can access the Fresh Fruit and Vegetable Grant Overview screen.

To access the Fresh Fruit and Vegetable Program Grants

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

2. From the Applications menu, select **Fresh Fruit and Vegetable Program Grant Overview.** The Fresh Fruit and Vegetable Program Grants – Grant Overview List screen displays.

3. Select the **Back** button to return to the Applications menu screen.

Fresh Fruit and Vegetable Program Grants - Grant Overview List

Agreement Number	Sponsor Name	Site Name	Total Grant Award
55-0001	Lincoln Public School	Adam High	$ 16,500.00
		Grand Total	**$ 16,500.00**
		Number of Sites	**1**

< Back

Figure 28: Fresh Fruit and Vegetable Program Grants – Grant Overview List screen

Verification Report

Sponsors use the Verification Report function to complete and submit the mandatory annual verification report to the State. The verification report contains information about sites collecting applications, site enrollment, eligibility information, and verification results.

To access a Verification Report

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

2. From the Applications menu, select **Verification Report**. The Verification Reports list screen displays.

To complete or modify a Verification Report

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

2. From the Applications menu, select **Verification Report**. The Verification Reports list screen displays.

3. Select Modify next to the year that you would like to enter data into the Verification Report. The Verification Report screen for the designated year selected is displayed.

4. Enter information into the screen fields provided.

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

6. Select **Edit** to return to the Verification Report screen.
   -OR-
   Select **Finish** to return to the Verification Reports list screen.

   Note: The Verification Report is automatically submitted when all required fields have been completed without errors and the user selects the **Save** button. If you do not correct the errors, the form status is "Error".

To delete a Verification Report

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

2. From the Applications menu, select **Verification Report**. The Verification Reports list screen displays.

3. Select Modify next to the year that you would like to delete an existing Verification Report. The Verification Report screen for the designated year selected 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.

7. Select **Finish**.

WARNING: Only Verification Reports that have not been submitted can be deleted. Selecting the DELETE button permanently deletes the Verification Report from the system. It will not be recoverable once deleted.

Food Safety Inspections

The Food Safety Inspections screen allows Sponsors to enter annual food safety inspection information for each of their sites. Food Safety Inspection reports are submitted for the prior year. Hence, during the 2011-2012 year, Sponsors are submitting Food Safety Inspection reports for the 2010-2011 year.

Note: Only enrolled sites are listed. If the site has an application on file for the designated year, it will be listed and the street address on that application will be displayed.

To access a Food Safety Inspections report

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

2. On the menu, select **Food Safety Inspections**. The Food Safety Inspections list screen displays.

To complete or modify a Food Safety Inspections report

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

2. From the Applications menu, select **Food Safety Inspections**. The Food Safety Inspections list screen displays.

3. Select Modify next to the year that you would like to enter data into the Food Safety Inspections screen. The Food Safety Inspections screen for the designated year selected is displayed.

4. Enter information into the screen fields provided.

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

6. Select **Edit** to return to the Food Safety Inspections screen.
   -OR-
   Select **Finish** to return to the Food Safety Inspections list screen.

Note: The Food Safety Inspections Report is automatically submitted when all required fields have been completed without errors and the user selects the **Save**

To delete a Food Safety Inspections report

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

2. From the Applications menu, select **Food Safety Inspections**. The Food Safety Inspections list screen displays.

3. Select Modify next to the year that you would like to enter data into the Food Safety Inspections screen. The Food Safety Inspections screen for the designated year selected 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.

7. Select **Finish**.

WARNING: Only Food Safety Inspections reports that have not been submitted can be deleted.   Selecting the DELETE button permanently deletes the Food Safety Inspections reports from the system. It will not be recoverable once deleted.

Financial Report

The Financial Report function allows users complete the annual required financial report.

To access Financial Report

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

2. From the Applications menu, select **Financial Report**. The Financial Report screen displays.

To complete a new Financial Report

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

2. From the Applications menu, select **Financial Report**. The School Food Service Financial Report screen displays.

3. Select **Detail** for the desired school year.

4. Select **Add Financial Form**. The Financial Report displays.

5. Complete the Financial Form.

6. Select the **Save**.

To view or modify a Financial Report

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

2. From the Applications menu, select **Financial Report**. The School Food Service Financial Report screen displays.

3. Select **Detail** for the desired school year.

4. Select **View** or **Modify**. The Financial Report displays.

5. Make any desired modifications to the Financial Form.

6. Select the **Save** if modifying the form.
   -OR-
   Select **Back** if viewing the form.

To view or modify a Financial Report Summary

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

2. From the Applications menu, select **Financial Report**. The School Food Service Financial Report screen displays.

3. Select **Detail** for the desired school year.

4. Select **Summary**.

5. Select **Back** when finished.

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 participates in the School Nutrition Programs. 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

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 Nutrition Services to validate the effective date of the Sponsor application and Site application.

At the time claims are submitted, they are checked by the system to ensure they conform to established business rules governing reimbursement claim eligibility and approval. 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 claim functions, view current claim rates, or view payment

summaries.

Item	Description
Claim - SNP	School Nutrition Program Claims
Claim - FFVP	Fresh Fruit and Vegetable Program Claims
Claim Rates	View current claim rates
Payment Summary	Summary of payments made to this Sponsor

Figure 29: Claims Menu

Claim Dates

Various dates are used in the claims function. The following table identifies and describes the dates used:

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 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.

To access Claim Entry

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

2. From the Claims menu, select the type of claim you would like to enter (e.g., SNP or FFVP). The Claim Year Summary screen displays.

   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 school year is the default year if no other school year has been selected. For help selecting a new school year, see *Selecting a School Year*.

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.

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 30: 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 31: 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 32: 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
Sep 2011	0				

Actions	Site #	Site Name			Errors	Status
View | Modify	0003	Adam High				Incomplete
	0004	Test 1				Not Eligible

Figure 33: Claim Site List screen

To add an original claim

Claims can be entered for each eligible month in the school 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 the type of claim you would like to enter (e.g., SNP or FFVP). 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

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 Nutrition Services.

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 the type of claim you would like to view (e.g., SNP or FFVP). 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 35: 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 Nutrition Services.

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 the type of claim you would like to enter (e.g., SNP or FFVP). 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

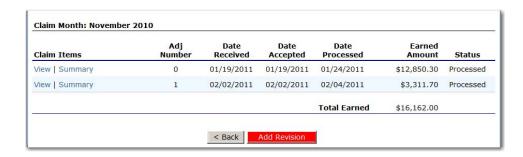| Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View | Summary	0	01/19/2011	01/19/2011	01/24/2011	$12,850.30	Processed
View | Summary	1	02/02/2011	02/02/2011	02/04/2011	$3,311.70	Processed
				Total Earned	$16,162.00	

< Back   Add Revision

Figure 36: 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

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.

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 Nutrition Services.

To view a claim

1. From the Claims menu, select the type of claim you would like to view (e.g., SNP or FFVP). 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.

1. From the Claims menu, select the type of claim you would like to view (e.g., SNP or FFVP). 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 **Summary.** The Claim for Reimbursement Summary screen displays.

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

Month/Year Claimed	Adjustment Number	Date Received	Date Accepted	Date Processed	Reason Code
Nov 2010	0	01/19/2011	01/19/2011	01/24/2011	Original

Contracting Entity Totals

Meal Type	Meals/Supplements Served	Federal Rate	Reimbursement Federal Amount
National School Lunch Program			
Free	2,711	2.7400	7,428.14
Reduced	620	2.3400	1,450.80
Paid	1,568	0.2800	439.04
Total	**4,899**		**9,317.98**
School Breakfast Program Severe Need			
Free	1,710	1.7600	3,009.60
Reduced	251	1.4600	366.46
Paid	601	0.2600	156.26
Total	**2,562**		**3,532.32**
Claim Reimbursement Total			**12,850.30**

Figure 37: Claim for Reimbursement Summary screen

To delete a claim

If the Sponsor 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 the type of claim you would like to view (e.g., SNP or FFVP). 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.

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 NDE 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**. The Claim Rates screen displays.
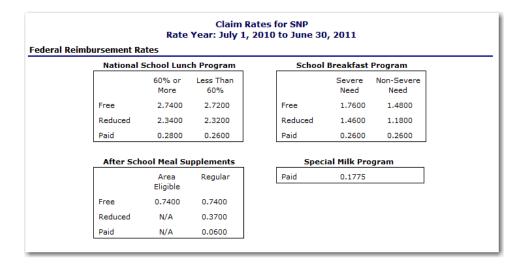
2. Use the **Back** button to return to the Claims menu.

Claim Rates for SNP
Rate Year: July 1, 2010 to June 30, 2011

Federal Reimbursement Rates

National School Lunch Program	60% or More	Less Than 60%
Free	2.7400	2.7200
Reduced	2.3400	2.3200
Paid	0.2800	0.2600

School Breakfast Program	Severe Need	Non-Severe Need
Free	1.7600	1.4800
Reduced	1.4600	1.1800
Paid	0.2600	0.2600

After School Meal Supplements	Area Eligible	Regular
Free	0.7400	0.7400
Reduced	N/A	0.3700
Paid	N/A	0.0600

Special Milk Program	
Paid	0.1775

Figure 38: Claim Rates for SNP screen

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

Payment Summary

The Payment Summary screen provides a list of all payment batch schedules processed for the Sponsor for the selected school 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
11020401	02/04/2011		$ 3,311.70	$ 0.00	$ 3,311.70
11012402	01/24/2011		$ 12,850.30	$ 0.00	$ 12,850.30

Figure 39: 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
11020401	02/04/2011	2010-2011	USDA - Federal Funds

Account Description	Month	Transaction Description	Amount
School Lunch			
	Mar 2010	Original Claim	$ 104.20
	Mar 2010	Distribution for Claim #1276	$ 104.20
	Nov 2010	Claim Revision Increase	$ 1,194.02
	Nov 2010	Distribution for Claim #1249	$ 1,194.02
School Breakfast			
	Mar 2010	Original Claim	$ 68.80
	Mar 2010	Distribution for Claim #1276	$ 68.80
	Nov 2010	Claim Revision Increase	$ 2,117.68
	Nov 2010	Distribution for Claim #1249	$ 2,117.68

Payment Schedule Summary			
	Mar 2010	School Lunch	$ 104.20
	Nov 2010	School Lunch	$ 1,194.02
	Mar 2010	School Breakfast	$ 68.80
	Nov 2010	School Breakfast	$ 2,117.68
		Total Payments	**$ 3,484.70**

Figure 40: Payment Summary screen

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 School Nutrition Programs 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 modify your user information

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

2. On the Security menu, select **My Account.** The My Account screen displays.

3. Modify any desired information.

   Note: Security rights determine whether you are allowed to modify information on your account.

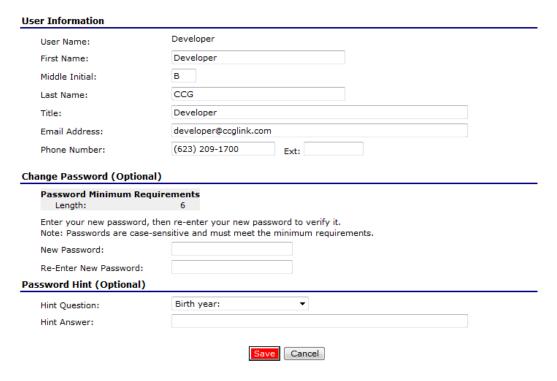4. Select **Save**. A confirmation message displays.

My Account

User Information

User Name:	Developer
First Name:	Developer
Middle Initial:	B
Last Name:	CCG
Title:	Developer
Email Address:	developer@ccglink.com
Phone Number:	(623) 209-1700 Ext:

Change Password (Optional)

Password Minimum Requirements
Length: 6

Enter your new password, then re-enter your new password to verify it.
Note: Passwords are case-sensitive and must meet the minimum requirements.

New Password:

Re-Enter New Password:

Password Hint (Optional)

Hint Question: Birth year: ▼

Hint Answer:

Save   Cancel

Figure 41: My Account screen

To change your password

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

2. On the Security menu, select **My Account.** The My Account screen displays.

3. Enter your **New Password**.

4. Re-Enter your New Password.

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

6

Application Packet Process

This section of the manual provides information on how the State can review and approve Application Packets within the system.

Note: For security purposes, users can only view Sponsors to whom they are associated.

Submitting an 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:

- The Sponsor Application must contain no errors.
- At least <u>one</u> Site Application must exist and contain no errors.
- If the Sponsor is using a Food Service Management Company (FSMC), at least <u>one</u> contract 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.

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.

Application Packet Statuses

Statuses are used to manage the workflow of the Application Packet. Each packet can have only one status at a time.

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.

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".

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.

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.

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".

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".

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.

Pending Validation

- The application has a status of "Pending Validation" when the application has not yet been opened or saved.

Error

- The application has a status of "Error" if it has failed system validation rules. Data entered is maintained.

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.

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.

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).

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.

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.

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.

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").

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.

Error

- The claim has a status of "Error" when the claim has been submitted and has business rule violations.

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.

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.

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.

Processed

- Claim has been fully processed by NDE and has been sent to the State's Accounting Office for disbursement of funds.