

COLYAR CONSULTING GROUP, INC.

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Child Nutrition Programs

**School Nutrition Programs**  
**User Manual**

**For Sponsor Users**

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# Introduction

*Welcome to the Wyoming Department of Education (WDE) user manual for the School Nutrition Programs module. The system is a web-based software solution that 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 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 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.



# 2

## Getting Started

*Before you can begin using the system's administrative modules, you must be assigned a user ID and password by the Help Desk 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 URL (shown below) in the address line:

-- (to be determined) --



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**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.

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The screenshot shows the 'Child Nutrition Program' home page. At the top, there is a banner with the text 'Child Nutrition Program' and the 'WDE' logo. Below the banner, on the left, is a 'Returning Users: Log On' form with fields for 'User ID:' and 'Password:', a 'Remember my User ID' checkbox, and a green 'Log On' button. To the right of the form are three small illustrations of children with fruit. Below these illustrations is the text 'Welcome to the Child Nutrition Information and Payment System'. Further down, there is a section for 'Links' with a bullet point for 'Wyoming Department Of Education'. At the bottom, there is a 'CNP Xpress' logo and a copyright notice: 'Copyright © 2007 Colyar Consulting Group'. There is also a note: 'An "initial message" can be entered here' and 'Message text can go here or you can put message text into groups and sort.'

**Figure 1: System Home Page**

# About the System Home Page

The System Home Page consists of three major sections:

- Bulletin Board.
- Log on.
- Links.

The bulletin board is managed by the State and provides general information.

The log on section is where authorized users enter their User ID and password. It also provides a link for users that have entered a valid User ID, but have forgotten their password, to be transferred to another webpage to reset their 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 Help Desk.



**TIP:** The Password is case-sensitive, so be sure to use upper and lower-case letters, if necessary.

### 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.

**Note:** Security configuration settings require a password ten (10) to twelve (12) characters in length. Please note that the password must be at least ten (10) characters in length. The password must contain at least one number, one letter, and one special character (e.g., !, ?, /). Passwords are case sensitive.

## 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 2: Screen Options - example**

The following table describes each of the possible screen options:

Item	Description
<b>VIEW</b>	Presents the screen information in 'view-only' mode. In this mode, the user cannot modify any data.
<b>MODIFY</b>	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.
<b>DELETE</b>	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.

## 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

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1. Log on to the system web site.
2. On the Programs screen, select **School Nutrition Programs** if necessary.

**Note:** If a user only has access to the School Nutrition Programs module, the Programs screen is not be displayed.

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 the Help Desk. Please note that messages are visible to both internal and external users.

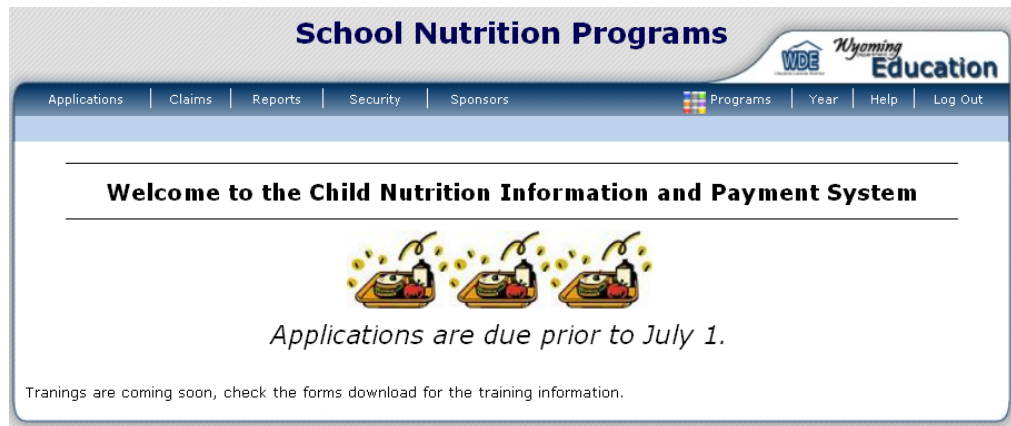


Figure 3: School Nutrition Programs Home Page

## School Nutrition Programs menu options

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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.

<b>Menu Item</b>	<b>Menu Features</b>
<b>Applications</b>	Access to overall application-related items including: <ul style="list-style-type: none"><li>▪ Sponsor Profile</li><li>▪ Application Packet (inc. Sponsor, SNP, SSO, and FFVP applications).</li><li>▪ Verification Reports</li><li>▪ Food Safety Inspection Reports</li><li>▪ Annual Audit Status Certification Form.</li></ul>
<b>Claims</b>	Access to claim entry screens (e.g., SNP, SSO, and FFVP) and Sponsor-specific payment history.
<b>Security</b>	Access to an individual user's security-related items including: <ul style="list-style-type: none"><li>▪ User Manager.</li></ul>
<b>Search</b>	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.

Site ID	Site Name	Total Enrollment	Total Eligible
1000	Test CE - Test Site Total Eligible cannot exceed Total Enrollment	50	80

Figure 4: 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, 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.

Code	Error Description
18207	Must Indicate either Traditional SFSP or Seamless Summer Option.

**Contact Information:**

1. Name: Salutation:  First Name:  Last Name:

2. Email Address:

3. Phone:  Ext:  Fax:

4. Title:

**Due Date: December 31, 2012**

**Summer Program Intention**

5.  Intends to offer 2011 summer meals through the following program:

- a. Traditional Summer Food Service Program (SFSP)
- b. Seamless Summer Option

**Figure 5: 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 6: 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 Help Desk.

## 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 the Help Desk 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.

**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 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.

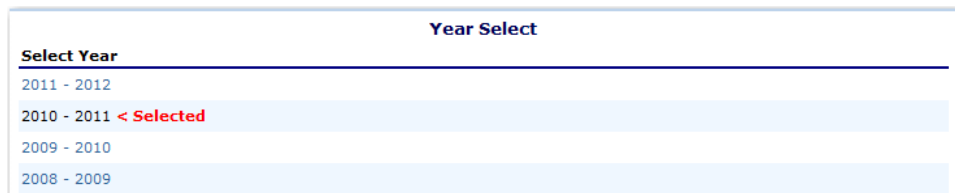


Figure 7: Year Select screen



# Sponsor Search

**Note:** If you are associated with only one Sponsor, you will be unable to access the Sponsor Search screen. The system will always default to the Sponsor's data.

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 Sponsor's ID, 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**.

Agreement #:	<input type="text"/>	Packet Status:	<input type="text" value="v"/>
Sponsor Name:	<input type="text"/>	Field Service Rep:	<input type="text" value="v"/>
Vendor Number:	<input type="text"/>	Packet Assigned To:	<input type="text" value="v"/>
County:	<input type="text" value="v"/>	Region:	<input type="text" value="v"/>
Sponsor Status:	<input type="text" value="v"/>	Program Status:	<input type="text" value="v"/>
<input type="checkbox"/> Search all available Programs		<input type="button" value="Search"/>	

**Figure 8: 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 # parameter, the system will retrieve Sponsors with Agreement #s 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 “Collin” in the County parameter, the system will retrieve all Sponsors associated with the county of Collin.

<b>Parameter</b>	<b>Type of Search</b>	<b>Search Features</b>
<b>Agreement #</b>	“includes”	<ul style="list-style-type: none"> <li>▪ If in combination with the Sponsor Name, the Agreement # takes precedence</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>
<b>Sponsor Name</b>	“includes”	<ul style="list-style-type: none"> <li>▪ If in combination with the Agreement #, the Agreement # takes precedence; this parameter is ignored</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>
<b>Vendor Number</b>	“includes”	<ul style="list-style-type: none"> <li>▪ If in combination with the Agreement #, the search is performed using both the Agreement # and this parameter</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>
<b>County</b> <b>Packet Status</b> <b>Field Service Rep</b> <b>Packet Assigned To</b> <b>Region</b> <b>Program Status</b>	“exact match”	<ul style="list-style-type: none"> <li>▪ If in combination with the Agreement #, the search is performed using both the Agreement # and this parameter</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>
<b>Program Status</b>	“exact match”	<ul style="list-style-type: none"> <li>▪ Required; defaults to “Active”</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>

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 # and Sponsor Status. If the Contracting Name is entered, and no Agreement # 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.

### SNP Sponsor Search

#### Search for Sponsors

Agreement #:	<input type="text"/>	Packet Status:	<input type="text" value="▼"/>
Sponsor Name:	<input type="text"/>	Field Service Rep:	<input type="text" value="▼"/>
Vendor Number:	<input type="text"/>	Packet Assigned To:	<input type="text" value="▼"/>
County:	<input type="text" value="▼"/>	Region:	<input type="text" value="▼"/>
Sponsor Status:	<input type="text" value="▼"/>	Program Status:	<input type="text" value="▼"/>

Search all available Programs

Sponsors						Found: 7
Agreement #	Sponsor Name	Application Packet Status	Submitted for Approval	Approval Date	Packet Assigned To	
00002	Colyar Test SNP	Not Started				
03035	Anytown School District	Approved	12/29/2010	12/29/2010	Greenlee, R	
03037	Carol's Test School District	Not Submitted				assign
03045	Michelle School	Approved	02/18/2011	02/18/2011		assign
03046	Kris Test	Not Submitted				assign
03047	Test Claims	Approved	02/24/2011	02/24/2011		assign
03048	Mary Immaculate Queen	Not Submitted				assign
Add New Sponsor						

**Figure 9: Sponsor Search screen – “Search all available Programs” example**

# 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 of the system, where users manage yearly enrollment of Sponsors and sites and complete the appropriate forms required by the State.*

### 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 base on your prior year's information.



**Figure 10: 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 the State.
- 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 11: 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**. The Applications Menu displays.
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.

<b>Item</b>	<b>Description</b>
Sponsor Profile	SNP Sponsor's Profile Information
Application Packet	Applications and Agreement Forms (Sponsor and Site)
Verification Report	Mandatory Annual Verification Report
Verification Summary	Mandatory Annual Verification Report Summary
Food Safety Inspections	Number of Food Safety Inspections by Site
Food Safety Inspections Summary	Number of Food Safety Inspections by Site Summary
Annual Audit Status Certification Form	Annual Audit Status Certification Form

**Figure 12: 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**. The Applications menu screen displays.
2. On the 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.

**Sponsor Profile Menu**

00002-SN-7-CS  
**Colyar Test SNP**  
No address on file for this year  
Vendor #: 032210

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

[< Back](#)

Figure 13: Sponsor Profile Menu screen

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

Item	Description
<b>Sponsor Profile</b>	Provides specific information for the Sponsor, including identification numbers, and program participation.
<b>Site Manager</b>	Provides access to the list of sites associated with the Sponsor and the ability to access a specific Site Profile



**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 #, 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 sponsor is defined in the system via the Sponsor Profile screen.

**Note:** The Sponsor Profile is view-only for sponsor users.

### To view 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. Select **<Back** to return to the previous screen.

**Sponsor Profile**

---

**Sponsor Information**

Agreement #: 03048  
Sponsor Name: Mary Immaculate Queen  
Federal Identification No. (FEIN):  
Vendor Number: A12100  
County: Campbell  
Is this sponsor a private sponsor or an Indian Tribal Council?  Yes  No

---

**Program Participation**

Select the program(s) the Sponsor will operate in:  SNP  SFSP  CACFP  
 Food Distribution

---

**School Nutrition Programs**

Claims are reported by:  Sponsor  Site  
School Code: N. Private School District

---

**Summer Food Service Program**

Claims are reported by:  Sponsor  Site  
SFSP Code:  
Field Service Representative:  
SFSP Specialist:



---

**Child & Adult Care Food Program**

Participating in the Centers Program

Claims are reported by:  Sponsor  Site

Agreement Type:

Agency Type:

Field Service Representative:

CACFP Specialist:

Last Base Year Renewal:

Next Base Year Renewal:

Next Renewal Frequency (Years):

---

**Day Care Home**

Participating in the Day Care Home

Claims are reported by:  Sponsor  Provider

Sponsor Type:

Field Service Representative:

DCH Specialist:

Last Base Year Renewal:

Next Base Year Renewal:

Next Renewal Frequency (Years):

---

**Food Distribution Program**

FDP Program Participation:  NSLP

Communication Preference:  Electronic  Paper

FDP Region:

FDP School Type:

---

**Status**

Sponsor Status:

---

**Figure 14: 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.

**Note:** The Site Manager is view-only for sponsor users.

## To access Site Manager

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. 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.

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

Site #	Site Name	CDS Code	Region	Status
14106	MARY IMMACULATE QUEEN		Region 2	Active
14107	Queen Mary High School		Region 3	Active

**Figure 15: Sponsor Site Manager screen**

## To view a Site Profile

- On the Applications menu, select **Sponsor Manager**. 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.
- Once a Sponsor has been selected, select **Site Manager**. The Sponsor Site Manager displays.
- Select the site you wish to view or modify. The Site Profile screen displays.
- Modify any desired information within the profile.
- Select **<Back** to return to the previous screen.

**Site Profile**

00002-SN-?-CS  
**Colyar Test SNP**  
 No address on file for this year  
 Vendor #: 032210

---

**Site Information**

Site Number: 1001  
 Site Name: Alameda County Office of Education  
 Region: Region 3  
 County:

---

**Program Participation**

Site will operate in the following programs:  SNP  SFSP  CACFP  Food Distribution

---

**Status**

Site Status: Active

**Figure 16: 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 any 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**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. 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   Revise	✔ Sponsor Application	Rev. 1	Approved
Details	Checklist Summary (1)		
Details	Application Packet Notes		

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

Figure 17: 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 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 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.

**2010 - 2011 Application Packet - SNP Site List**

03035-SN-14-PSD  
**Anytown School District**  
 123 Main Street  
 Anytown, WY 12345  
 Sheridan  
 Vendor #: J4321

Action	Site# / Site Name	LUN	REG BRK	SN BRK	NAE SNK	AE SNK	SMP	FFVP	Version/Status	% Enroll Free/Redc Oct 2009
<b>Totals</b>		3	1	2	3	0	0	0		
<a href="#">View</a>   <a href="#">Revise</a>   <span style="color: green;">✔</span>	14086 Anytown Elementary School # 1	X	X		X				Original / Approved	0.00
<a href="#">View</a>   <a href="#">Revise</a>   <span style="color: green;">✔</span>	14088 Anytown High School # 3	X		X	X				Original / Approved	0.00
<a href="#">View</a>   <a href="#">Revise</a>   <span style="color: green;">✔</span>	14087 Anytown Middle School # 2	X		X	X				Original / Approved	0.00
<a href="#">Add Site Application</a>										
<b>Total Sites Enrolled: 3</b>										

Figure 18: 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.

**Note:** The sites displayed on this screen are sites that are designated as SNP 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**. The 'Quick' Site Profile screen displays.
6. Enter the Site ID. This number must be unique for the Sponsor.
7. Enter the Site Name.
8. Select **Save**. The Site Application for the new site is displayed.

**'Quick' Site Profile**

00002-SN-?-PSD  
**Colyar Test SNP**  
No address on file for this year  
Vendor #: 032210

---

**Site Information**

Site Number:

Site Name:

Figure 19: '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.

---

## Site Applications – Seamless Summer Option

Sponsors must complete a Site Application for each of their seamless summer sites. The Site Application screen provides access to the Site’s annual application for the Seamless Summer Options 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 **Seamless Summer Option**. The Application Packet – Seamless Summer Option Site List screen displays.

Action	Site# / Site Name	LUN	REG BRK	SN BRK	NAE SNK	AE SNK	SMP	FFYP	Version/ Status	% Enroll Free/Redc Oct 2010
<b>Totals</b>		3	3	0	3	0	0	0		
View   Modify Admin	➔ 14086 Anytown Elementary School # 1	X	X		X				Original / Pending Validation	0.00
View   Modify Admin	➔ 14088 Anytown High School # 3	X	X		X				Original / Pending Validation	0.00
View   Modify Admin	➔ 14087 Anytown Middle School # 2	X	X		X				Original / Pending Validation	0.00
Add Site Application										

Figure 20: Application Packet – Seamless Summer Option Site List screen

### To add a new SSO 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 **Seamless Summer Option**. The Application Packet - Seamless Summer Option Site List screen displays.
4. At the bottom of the site list, select **Add Site Application**. The SSO Available Site(s) screen displays.

**Note:** The sites displayed on this screen are sites that are designated as SSO 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**. The 'Quick' Site Profile screen displays.
6. Enter the Site Number. This must be unique for the Sponsor.
7. Enter the Site Name.
8. Select **Save**. The SSO Site Application for the new site is displayed.

**'Quick' Site Profile**

00002-SN-7-PSD  
**Colyar Test SNP**  
No address on file for this year  
Vendor #: 032210

**Site Information**

---

Site Number:

Site Name:

Figure 21: 'Quick' Site Profile screen

## To view a SSO 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 **Seamless Summer Option**. The Application Packet - Seamless Summer Option Site List screen displays.
4. Select View next to the site whose application you would like to view. The site's SSO Site Application is displayed.

## To modify a SSO 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 **Seamless Summer Option**. The Application Packet - Seamless Summer Option Site List screen displays.
4. Select **Modify** next to the site whose application you would like to view. The site's SSO Site Application is displayed.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the SSO Site Application screen.  
-OR-  
Select **Finish** to return to the Seamless Summer Option Site List screen.
8. Repeat **Steps** 4 through 7 for each site that will participate in the program.

## To delete a SSO 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 **Seamless Summer Option**. The Application Packet - Seamless Summer Option Site List screen displays.
4. Select **Modify** next to the site whose application you would like to delete. The site's SSO 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 SSO 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 **Seamless Summer Option**. The Application Packet - Seamless Summer Option Site List screen displays.
  4. Select **Revise** next to the site whose application you would like to delete. The site's SSO Site Application is displayed.
  5. Modify any desired information.
  6. Select **Save**. A confirmation screen displays.
  7. Select **<Edit** to return to the SSO Site Application screen.
- OR-
- Select **Finish** to return to the Seamless Summer Option Site List screen.



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

## 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.

**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 Sponsors.

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.

Packet Assigned To: David Wilhelm			
Action	Form Name	Latest Version	Status
View   Revise	✔ Sponsor Application	Rev. 3	Approved
Add	Fresh Fruit And Vegetable Program Application		Not Started
Details	Checklist Summary		
Details	Application Packet Notes		

Figure 22: 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.

## Food Service Management Company (FSMC) Fact Sheet

If the Sponsor's School Nutrition Program 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 Fact Sheet will not appear on the Application Packet screen.

## To add a Food Service Management Company Fact Sheet

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Add** next to the **FSMC Fact Sheet**. The Food Service Management Company Fact Sheet screen displays.



### Food Service Management Company Fact Sheet

00002-SN-?-PSD  
**Colyar Test SNP**  
No address on file for this year  
Vendor #: 032210

#### Food Service Management Company Fact Sheet

This is the Initial Contract Year. Complete questions 1 through 9.

This is a Renewal Contract Year. Complete questions 1 and 9 through 12.

1. We have contracted with:  A Food Service Management Company (Purchase of Management Services)  
 A Food Service Consulting Company (Purchase of Consulting Services)

2. The method by which the contract was awarded:

Competitive Sealed Bids                      Number sent:

Competitive Negotiation                      Number sent:

Competitive Small Purchase Procedures      Number of contacts made:

Noncompetitive Negotiation (Describe in question 7 below.)

3. In #2, if Competitive Sealed Bids or Competitive Negotiation was indicated, list the following:

Names of FSMCs responding from question 2 above.	Total Proposed Yearly Cost (All Expenses)
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Figure 23: Food Service Management Company Fact Sheet screen (partial)

4. Select if this is the Initial Contract Year or the Renewal Contract Year.
5. If this is the Initial Contract Year, complete questions 1 - 9.  
If this is a Renewal Contract Year, complete question 1 and questions 9-12.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Food Service Management Company Fact Sheet screen.  
-OR-  
Select **Finish** to return to the Application Packet screen.

### To modify a Food Service Management Company fact sheet

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Modify** for the **FSMC Fact Sheet**. The Food Service Management Company Fact Sheet list screen displays.
4. Modify any desired information.

5. Select **Save**. A confirmation screen displays.
  6. Select **<Edit** to return to the Food Service Management Company Fact Sheet screen.
- OR-
- Select **Finish** to return to the Application Packet 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**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Modify** next to **FSMC Fact Sheet**. The Food Service Management Company Fact Sheet screen displays.
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:** 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 enter Internal Use Only information

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Admin** next to **FSMC Fact Sheet**. The Food Service Management Company Fact Sheet screen displays.
4. Enter information in the Internal Use Only section.
5. Select **Save Internal Use Only**. A confirmation screen displays.
6. Select **<Edit** to return to the Food Service Management Company Fact Sheet screen.

-OR-

Select **Finish** to return to the Food Service Management Company Fact Sheet screen.

## 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**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Checklist Summary**. The Checklist Summary screen displays.

SNP Checklist Summary

03035-SN-003-PSD Anytown School District 123 Main Street Anytown, WY 12345 Sheridan Vendor #: J4321			
Sponsor	Total Items	Submitted Items	Approved Items
Anytown School District	1	0	0
School Nutrition Programs Sites	Total Items	Submitted Items	Approved Items
Anytown Elementary School # 1	0	0	0
Anytown High School # 3	0	0	0
Anytown Middle School # 2	0	0	0
Seamless Summer Feeding Option Sites	Total Items	Submitted Items	Approved Items
Anytown Elementary School # 1	0	0	0
Anytown High School # 3	0	0	0
Anytown Middle School # 2	0	0	0

Figure 24: Checklist Summary screen

### To view a Checklist

---

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

### To update a Checklist

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
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 update. The Checklist screen displays.
5. Identify whether the document has been submitted and the submission date. The Date Submitted to WDE 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 WDE.
6. Select Save. The Checklist Summary screen displays.

## 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**. The Applications menu screen displays.
2. On the 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**. The Applications menu screen displays.

2. On the 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**. The Applications menu screen displays.
2. On the 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**. The Applications menu screen displays.
2. On the 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** button. If you do not correct the errors, the form status is "Error".

### To delete 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.
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.

## Annual Audit Status Certification

The Annual Audit Status Certification Form screen provides access to the selected sponsor's

Annual Audit Status Certification form based on the year that is selected. Applicable sponsors must fill out an annual audit status certification form one time per year.

**Note:** The Year will default to the current year, if the year needs to be changed, clicking the Year option on the blue menu bar at the top of the page will allow the user to select a different year, provided that they have the necessary security clearance.

The Annual Audit Status Certification Form screen allows the sponsor to enter its information and allows the Department to view the entered data along with audit data imported from Audits and Investigation.

### To view an annual audit status certification form

---

1. If necessary, select a sponsor using Sponsor Search.
2. On the blue menu bar, click **Applications**.  
The Applications menu screen displays.
3. On the menu, click **Annual Audit Status Certification Form**.  
The Annual Audit Status Certification Form screen displays.

**2011 - 2012 Annual Audit Status Certification Form**

03035-SN-003-PSD  
**Anytown School District**  
123 Main Street  
Anytown, WY 12345  
Sheridan  
Vendor #: J4321

**Name and Title of Authorized Representative**

Salutation	First Name	Last Name
Name: <input type="text"/>	<input type="text"/>	<input type="text"/>
Email Address:	<input type="text"/>	
Phone: <input type="text"/>	Ext: <input type="text"/>	Fax: <input type="text"/>
Title:	<input type="text"/>	

---

**Organization Type**

---

**Figure 25: Annual Audit Status Certification Form (Partial)**

## To delete an annual audit status certification form

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**Note:** Annual Audit Status Certification Forms may only be deleted if they are NOT reviewed as "Completed" by the State.

1. From the Application menu, click **Annual Audit Status Certification Form**.  
The Annual Audit Status Certification Form screen displays.
2. On the Edit menu, click **DELETE**.  
A warning displays.



---

**WARNING:** Clicking the button permanently deletes the Annual Audit Status Certification Form from the application and it will not be recoverable once deleted.

---

3. Click **Delete**.  
A confirmation screen displays.
4. Click **Finish** to return to the Applications menu.



# 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 the Help Desk 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 Entry	Claim Entry (School Nutrition Program or State Meal Program)
Claim Entry - Seamless Summer	SSFO Claim Entry (Lunch, Breakfast, Snack, Supper)
Payment Summary	Payment Summary

**Figure 26: Claims Menu**

## Claim Dates

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

Date	Description
<b>Date Created</b>	This date is set to the current system date when the claim is initially created.
<b>Date Modified</b>	This date is set to the current system date when the claim is initially created and each time the claim is saved.
<b>Date Received</b>	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.
<b>Date Accepted</b>	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.
<b>Date Processed</b>	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.



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**WARNING:** Only Sponsors authorized by the State can submit site-level claims. Please contact the Help Desk if you are interested in site-level claiming.

---

### 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, SSO 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
<b>Year to Date Totals</b>					<b>\$72,126.94</b>

Figure 27: 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: October 2010

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
<a href="#">Claim   Summary</a>	0	11/18/2010	02/18/2011	02/18/2011	\$2,780.00	Processed
<b>Total Earned</b>					\$2,780.00	

**Figure 28: 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: October 2010

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
<a href="#">Claim   Summary</a>	0	11/18/2010	02/18/2011	02/18/2011	\$2,780.00	Processed
<a href="#">Claim   Summary</a>	1	02/25/2011	02/25/2011		\$50.40	Accepted
<b>Total Earned</b>					\$2,830.40	

**Figure 29: 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.

**2010 - 2011 SNP Claim Site List**

03035-SN-14-PSD  
**Anytown School District**  
 123 Main Street  
 Anytown, WY 12345  
 Sheridan  
 Vendor #: J4321  
 payment address

Month/Year Claimed	Adjustment Number	Date Received	Date Accepted	Date Processed	Reason Code
Aug 2010	0	08/03/2010	01/03/2011	02/17/2011	Original

Internal Use Only

Actions	Site #	Site Name	Errors	Status
View	14086	Anytown Elementary School # 1		Paid
View	14087	Anytown Middle School # 2		Paid
	14088	Anytown High School # 3		

< Back

**Figure 30: 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, SSO). 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: November 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	

**Figure 31: 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 Help Desk.

## 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, SSO). 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
<a href="#">View</a>   <a href="#">Modify</a>   <a href="#">Summary</a>	0	01/26/2011			\$1,151.70	Pending
<b>Total Earned</b>					\$1,151.70	

**Figure 32: 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 Help Desk.

## 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, SSO). 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: October 2010

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
Claim   Summary	0	11/18/2010	02/18/2011	02/18/2011	\$2,780.00	Processed
Claim   Summary	1	02/25/2011	02/25/2011		\$50.40	Accepted
<b>Total Earned</b>					\$2,830.40	

**Figure 33: 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 Help Desk.

---

## To view a claim

1. From the Claims menu, select the type of claim you would like to view (e.g., SNP, SSO 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, SSO). 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
Oct 2010	0	11/18/2010	02/18/2011	02/18/2011	Original
<b>Sponsor Totals</b>					
Meal Type		Meals/Supplements Served		Reimbursement Federal Amount	
<b>National School Lunch Program</b>					
Free		500		1,360.00	
Reduced		500		1,160.00	
Paid		1,000		260.00	
<b>Total</b>		<b>2,000</b>		<b>2,780.00</b>	
<b>Claim Reimbursement Total</b>					<b>2,780.00</b>

**Figure 34: Claim for Reimbursement Summary screen**

## To delete a claim

If the Contracting Entry 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, SSO). 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.

---

## 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. The Sponsor's payment summary displays the following items:

### 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 35: 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
<b>Total Payments</b>			<b>\$ 3,484.70</b>

Figure 36: 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. Select **Security** on the blue menu bar at the top of the page.  
The Security menu displays.
2. Select a security item to access that security function.

## 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.

- From the User Manager/Search for User Page, select the type of search on the **Search By** drop-down list. Enter the Last Name, User Name or SNP ID 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

- Select the User you wish to access.  
The User Options menu displays.

## To add a new user

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If you have already selected a user or are elsewhere in the application, return to the User Manager screen.

- From the User Manager screen, select **Add New User**.  
The User Profile screen displays.
- Enter the new user's information in the User Information section.
- 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.]

**Note:** Default settings require a password to be at least six characters in length, containing one or more numbers. However, these settings can be changed by state administrators within the Configuration module.

- 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.
- Use the drop-down menu to select the user's status.
- Select **Save**.  
A confirmation screen displays.

**Note:** After creating a new user, it is recommended that you assign the user to an assigned group. Until the user is linked to a security group, he or she does not have any security rights and will not be able to access any system functions.

## 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, User Name or SNP ID 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

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1. Access the User's Profile you wish to view or modify through the User Manager.
2. Modify any desired information.
3. 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.

**Note:** A user cannot modify his/her own assigned security groups.

### 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:** John Smith

Available Group		Assigned Group
Colyar Consulting Group Test Group State Administrator Accounting Web Arts Guest Test	<input type="button" value="Add &gt;"/>  <input type="button" value="&lt; Remove"/>	SNP Sponsor - APPS SNP Sponsor - CLAIMS SNP Superintendent

**Note: This user is a 'Sponsor Administrator'. Changing the Assigned Groups will change the Assigned Groups for all related Sponsor Administrators.**

Figure 37: 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.



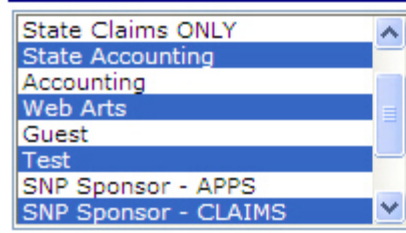
**TIP:** You can easily select multiple groups two ways:

#### 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



Hold down the Ctrl key while clicking each group to select all groups at one time.

7. Select **Add>**.
8. Select **OK** on the Message box that appears.
9. Select **Save**.  
A confirmation screen displays.

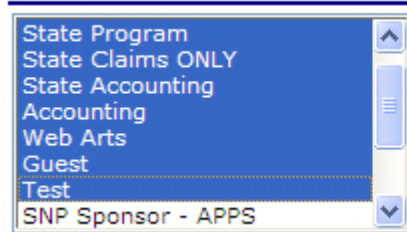
### To remove a user from assign group(s)

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.



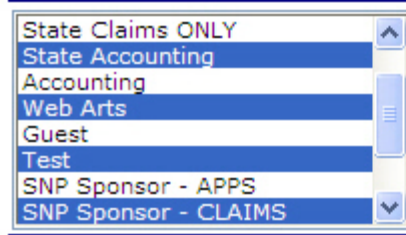
**TIP:** You can easily select multiple groups two ways:

### Available Group



Hold down the Shift key while clicking State Program and Test to select all contiguous groups.

### Available Group



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 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.

**Note:** A user cannot modify his/her own assigned security rights.

### To access User 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: jsmith Name: John Smith

### Security Rights Settings

SNP		bottom
Allow	Deny	
<input checked="" type="radio"/>	<input type="radio"/>	SNP
<input checked="" type="radio"/>	<input type="radio"/>	Applications
<input checked="" type="radio"/>	<input type="radio"/>	Sponsor Profile
<input checked="" type="radio"/>	<input type="radio"/>	Sponsor Manager
<input checked="" type="radio"/>	<input type="radio"/>	Sponsor Profile
<input checked="" type="radio"/>	<input type="radio"/>	Sponsor Profile - View
<input checked="" type="radio"/>	<input type="radio"/>	Site Manager
<input checked="" type="radio"/>	<input type="radio"/>	Site Profile
<input checked="" type="radio"/>	<input type="radio"/>	Site Profile - View
<input checked="" type="radio"/>	<input type="radio"/>	Application Packet
<input checked="" type="radio"/>	<input type="radio"/>	Application Packet
<input checked="" type="radio"/>	<input type="radio"/>	Submit Application Packet for Approval

Figure 38: 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.

### 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.



Figure 39: 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.

### 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 six 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 six 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 between 6 and 15 characters, including numbers, upper-case, and lower-case letters.

7. Confirm the New Password.
8. Select **Save**.  
A confirmation screen displays.

**Reset User's Password**

---

**User Information**

First Name:	John
Middle Initial:	
Last Name:	Smith
User Name:	johnsmith1

---

**Login Information**

New Password:	<input type="password"/>
Confirm New Password:	<input type="password"/>
Require password change next login:	<input checked="" type="checkbox"/>

---

**Figure 67: Reset User's Password screen**

# 7

## Application Packet Process

*This section of the manual provides information on how the State can review and approve Application Packets through 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 system 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 one Site Application must exist and contain no errors.
- If the Sponsor is using a Food Service Management Company (FSMC), at least one 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.
- \*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 WDE and has been sent to the State’s Accounting Office for disbursement of funds.