Texas Department of Agriculture
Food and Nutrition Division
Summer Food Service Program User Manual

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1.0 Summer Food Service Program

1.1 Purpose/Overview

The purpose of the Texas Unified Nutrition Programs System (TX-UNPS) user manual for the Summer Food Service Program (SFSP) module is to provide administrators, State users, and Contracting Entities with efficient and immediate information to access the web-based software applications, claims, and related nutrition program functions.

1.2 Website Benefits and Features

The SFSP module is a user-friendly application that allows authorized users to submit and approve applications, claims, and miscellaneous forms. Key system features include:

- A software system that manages information regarding Contracting Entities, applications, claims, and reports.
- A single integrated database which serves all child nutrition programs.
- The ability to save partially completed forms online, 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.

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2.0 Accessing the Website

Before you can begin using the **SFSP** module, you must be assigned a user ID and password that provides the required security privileges. Once this setup is complete, you may use the Internet and your assigned user ID and password to access and log onto the website.

The system can be accessed from any computer connected to the Internet by opening the browser and entering the designated URL in the browser's address line:

http://txunps1.texasagriculture.gov/TXUNPS/Splash.aspx.

Helpful Tips

***Tip:** Add the URL to your browser's Favorites list or create a shortcut to the website on your desktop for quicker access to the site. Refer to the browser and operating system help files for further information.*

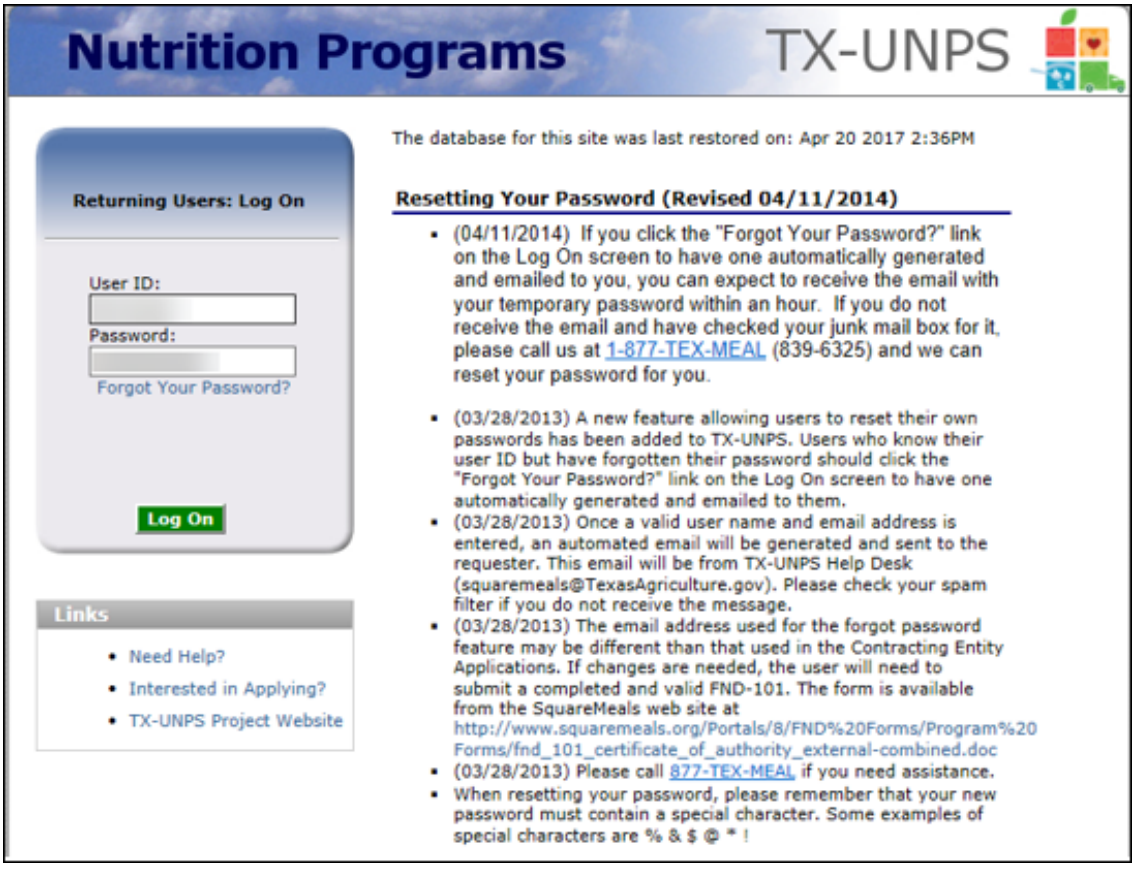

Figure 1: Logon Screen

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2.1 Logging On

2.1.1 To Log On

Using the log on section of the homepage:

1. Enter the assigned **User ID**.
2. Enter your **Password**.
3. Select **Log On**.

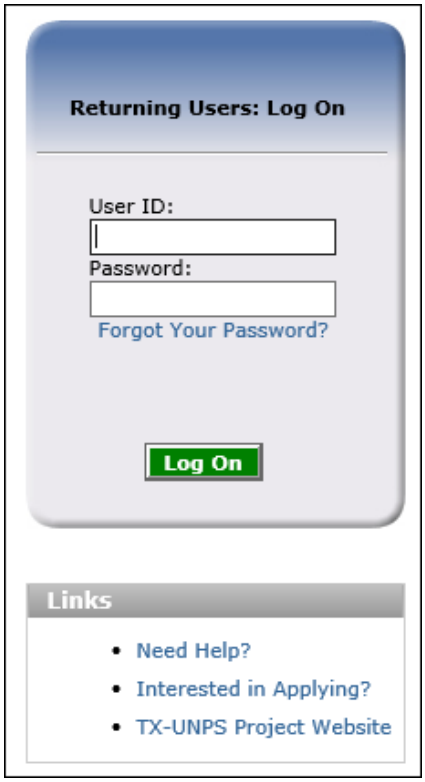

Figure 2: Logon Screen

2.1.2 First Time Logging In?

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 the new **password** for confirmation.
3. Select **Save**.

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Please Note: Security configuration settings generally require a password eight (8) to twelve (12) characters in length. Please note that the password must be at a minimum eight (8) characters in length. Passwords are case-sensitive.

The password must contain at least:

- One numeric character.
- Once special character (e.g., $, ?, !).
- One uppercase character.

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

2.2 Programs Page

Once you successfully log on, the Programs page is displayed. Actual access to specific modules is based on the user's security rights. For example, Contracting Entity users will not have access to the Accounting, Maintenance and Configuration, and Security modules because these modules are only for authorized State users.

Tip: *If your user ID is associated with only one (1) module, the Programs screen will not display; the system will automatically take you to the module you are authorized to access.*

Figure 3: Programs Menu Screen

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3.0 Summer Food Service Program

The Summer Food Service Program (SFSP) module contains the message board used by State administrators to post and maintain Summer Food Service Program related communications. The message board may contain important news regarding the submission due dates, upcoming training, legislative changes, or any other SFSP specific information.

3.1 Accessing the SFSP Home Page

1. Log on to the **TX-UNPS website.**
2. On the Programs screen, select **Summer Food Service Program.**

Please Note: If a user only has access to the SFSP module, the Programs screen is not available.

3. The SFSP home page will display.

Please Note: State administrators maintain the message boards for all TX-UNPS modules. If you would like a message posted on the Summer Food Service Program home page, please email FN.WebUpdates@Texas.Agriculture.gov. Messages are visible to both internal and external users.

Figure 4: SPSP Main Screen

3.2 SFSP Program Menu Options

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

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

3.3 System Rules and 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.

3.3.1 Input Edits

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

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

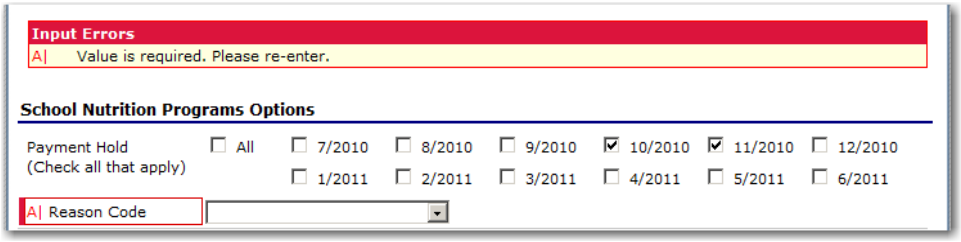

Figure 5: Input Errors Screen

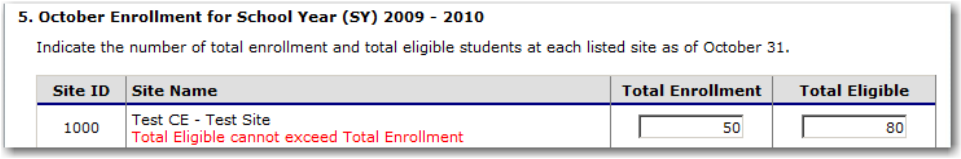

Figure 6: Examples of an Input Error (Partial Screen)

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3.3.2 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, TX-UNPS will perform business rule edit checks after all input errors have been corrects and a confirmation screen is provided stating that data entered has been saved and identifies whether errors exist.

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

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

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

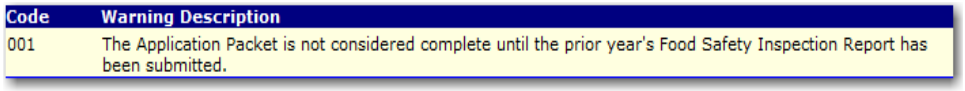

Figure 8: Example of a Warning Error

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3.4 Selecting a Program Year

Information for Contracting Entities and sites is displayed based on the selected program year. Upon logging in to the system, the "active" program year is the default selection and can be found in the top-right corner of the red bar. To view information from a prior year, you will need to change the program year.

Please Note: A Contracting Entity will be unable to select and view any year, inclusive of current and past years, if they have been granted the security right to do so.

3.4.1 Selecting a Program Year

1. Select **Year** on the blue menu toolbar at the top of the page. The Year Select screen displays.
2. Select the **year.** The selected year is indicated by **<Selected.**
3. Use the **menu** bar to return to the task in the program.

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

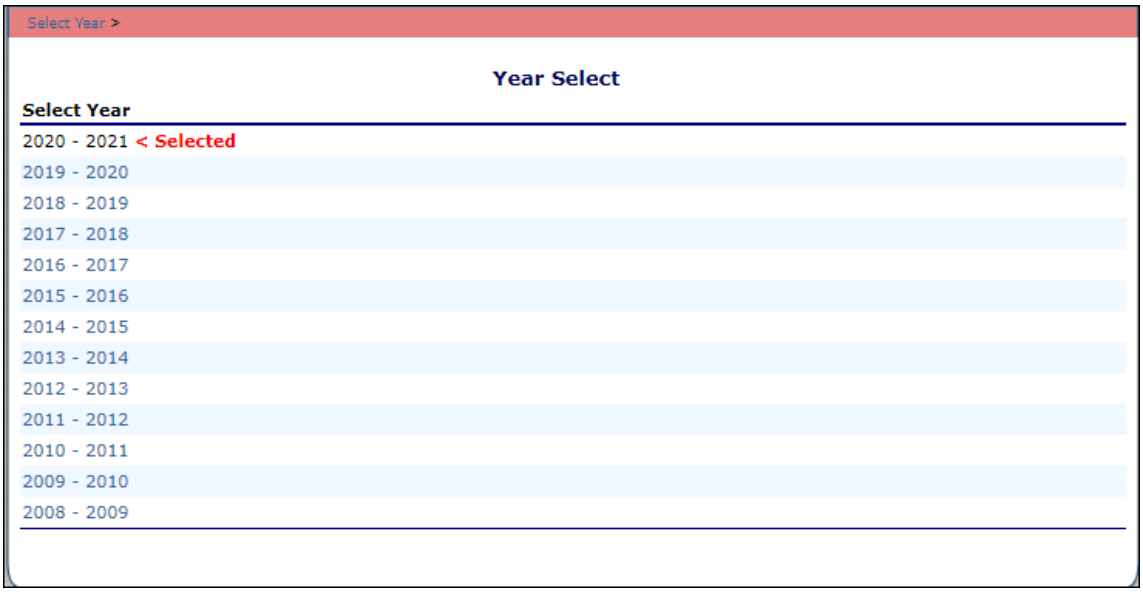

Figure 9: Select Year Screen

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3.5 Contracting Entity Search

For most Summer Foods Service Program functions, the Contracting Entity must be searched for and selected prior to beginning any task. When the Contracting Entity Search screen displays, you can search for the Contracting Entity using all or part of the Contracting Entity's ID, Name, or any other combination of parameters provided on this screen.

3.5.1 Searching for a Contracting Entity

1. On the menu toolbar, select **Search** to access the SFSP Search Options screen.

Figure 10: Search Options Screen

2. Select **Contracting Entity Search**.
3. Enter **search parameters**.
4. Select **Search**.
5. Select the appropriate **Contracting Entity**.

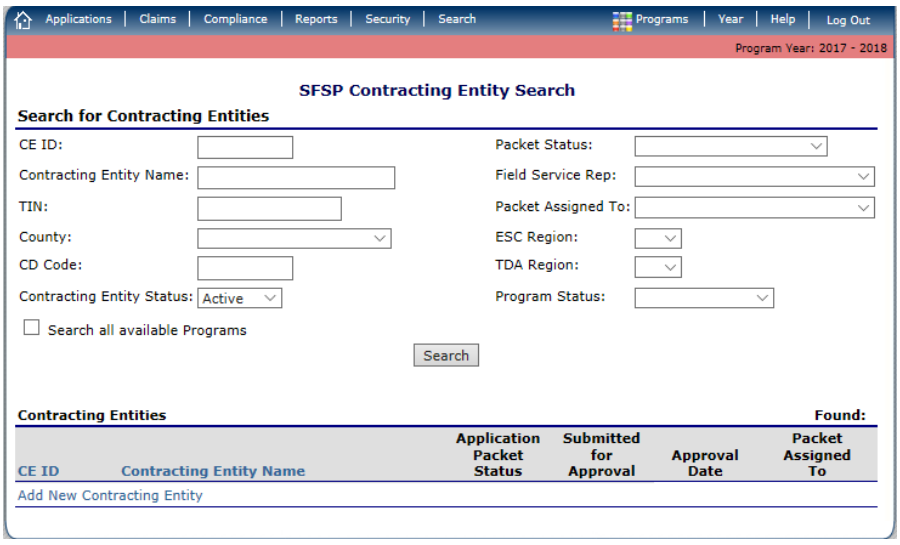

Figure 11: Contracting Entity Search Screen

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__Tip:__ The Contracting Entities List displays based upon the search criteria entered. If no selections were made, the list displays all available Contracting Entities with the designated status (default is "Active"). To display all Contracting Entities, leave all search parameters blank and select __Search.__ Users will only see Contracting Entities associated with their user account (e.g., ESC users will only see Contracting Entities in their region).

The search parameters follow a specific set of rules which are described in the accompanying table. If the type of search is identified as "includes", the system will search for any Contracting Entity that includes the parameter in any portion of the selected field. For example, if the user entered "386" in the CE ID parameter, the system will retrieve Contracting Entities with CE IDs of "00386" and "01386".

If the type of search is "exact match", the system will search only for any Contracting Entity that exactly matches the parameter.

Parameter	Type of Search	Search Features
CE ID	"includes"	If in combination with the Contracting Entity Name, the CE ID takes precedence If in combination with any other parameter, all parameters are used to perform the search
Contracting Entity Name	"includes"	If in combination with the CE ID, the CE ID takes precedence; this parameter is ignored If in combination with any other parameter, all parameters are used to perform the search
TIN **CD Code**	"includes"	If in combination with the CE ID, the search is performed using both the CE ID and this parameter If in combination with any other parameter, all parameters are used to perform the search
County **Packet Status** **Field Service Rep** **Packet Assigned To** **ESC Region** **TDA Region** **Program Status**	"exact match"	If in combination with the CE ID, the search is performed using both the CE ID and this parameter If in combination with any other parameter, all parameters are used to perform the search

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Parameter	Type of Search	Search Features
Contracting Entity Status	"exact match"	Required; defaults to "Active" If in combination with any other parameter, all parameters are used to perform the search.

If the "**Search all available Programs**" checkbox is checked, the results display changes in appearance. The system will ignore all search criteria except for the CE ID and Contracting Entity Status. If the Contracting Name is entered, and no CE ID is entered, the system will ignore all search criteria except for Contracting Entity Name. IF no parameters are entered, the system will retrieve all Contracting Entities in all programs.

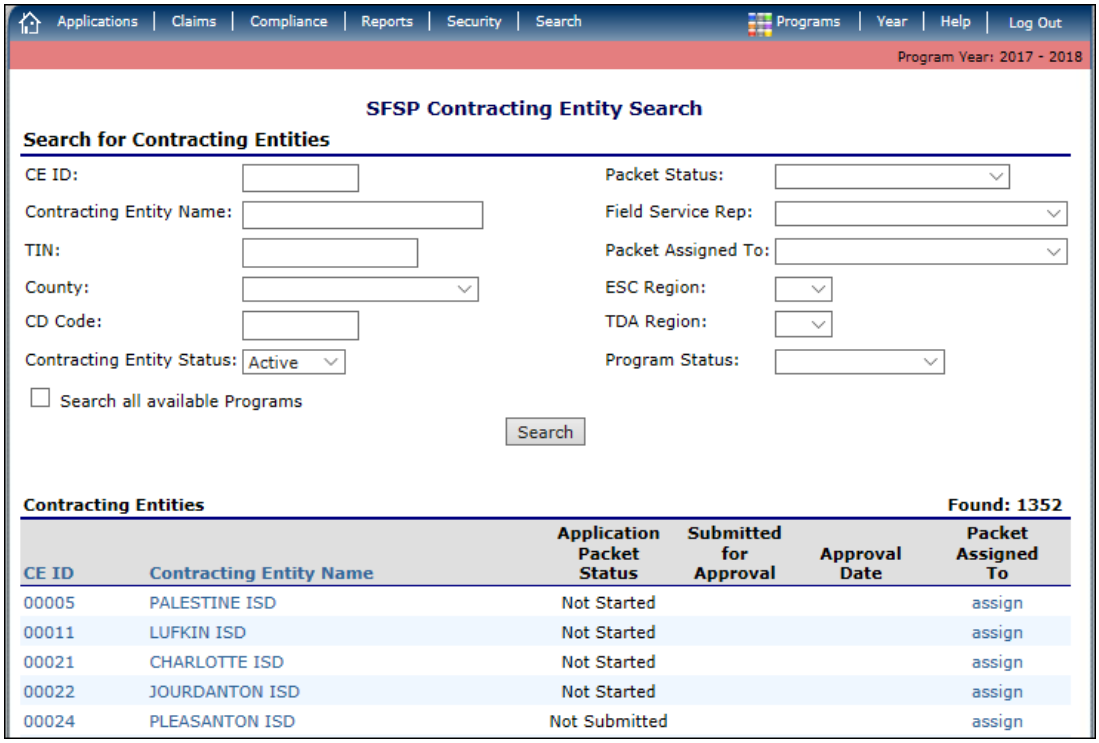

Figure 12: Contracting Entity Search Screen – "Search all available Programs" example.

3.5.2 Adding a New Contracting Entity

1. On the menu toolbar, select **Search** to access the Contracting Entity screen.
2. Perform a search to ensure that the **Contracting Entity** does not already exist in the system.
3. Select **Add New Contracting Entity** at the bottom of the screen results section. The Contracting Entity Profile screen displays.

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4. Refer to the **Contracting Entity Profile** section.

Figure 13: Add New Contracting Entity Screen

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4.0 SFSP Applications

4.1 Program Year Enrollment Process

To participate in the Summer Food Service Program, Contracting Entities must submit an Application Packet to the State for review and approval. Before beginning the Application Packet, Contracting Entities must select the “Enroll” button on the Application Packet screen and click “Yes” on the subsequent confirmation screen. After a Contracting Entity is enrolled, they must complete all required applications and forms in the Application Packet for the program year.

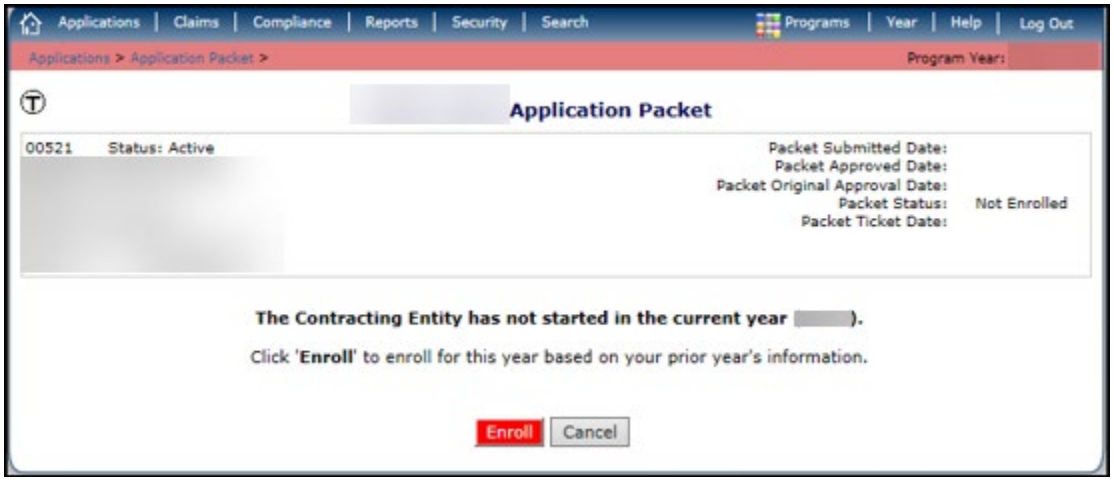

Figure 14: Enrollment Screen

A new Application Packet must be submitted and approved at the beginning of each year. For Contracting Entities that are completing this process as part of their “annual update,” certain information from the previous year’s application rolls over into the new program year. The Contracting Entity 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).

4.2 Submitting an Application Packet

The Contracting Entity 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.

To submit an Application Packet, the packet must contain:

- A completed Contracting Entity Application with no errors.
- At least one completed SFSP Site Application with no errors.
- All items in the Checklist are identified as submitted to TDA.

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

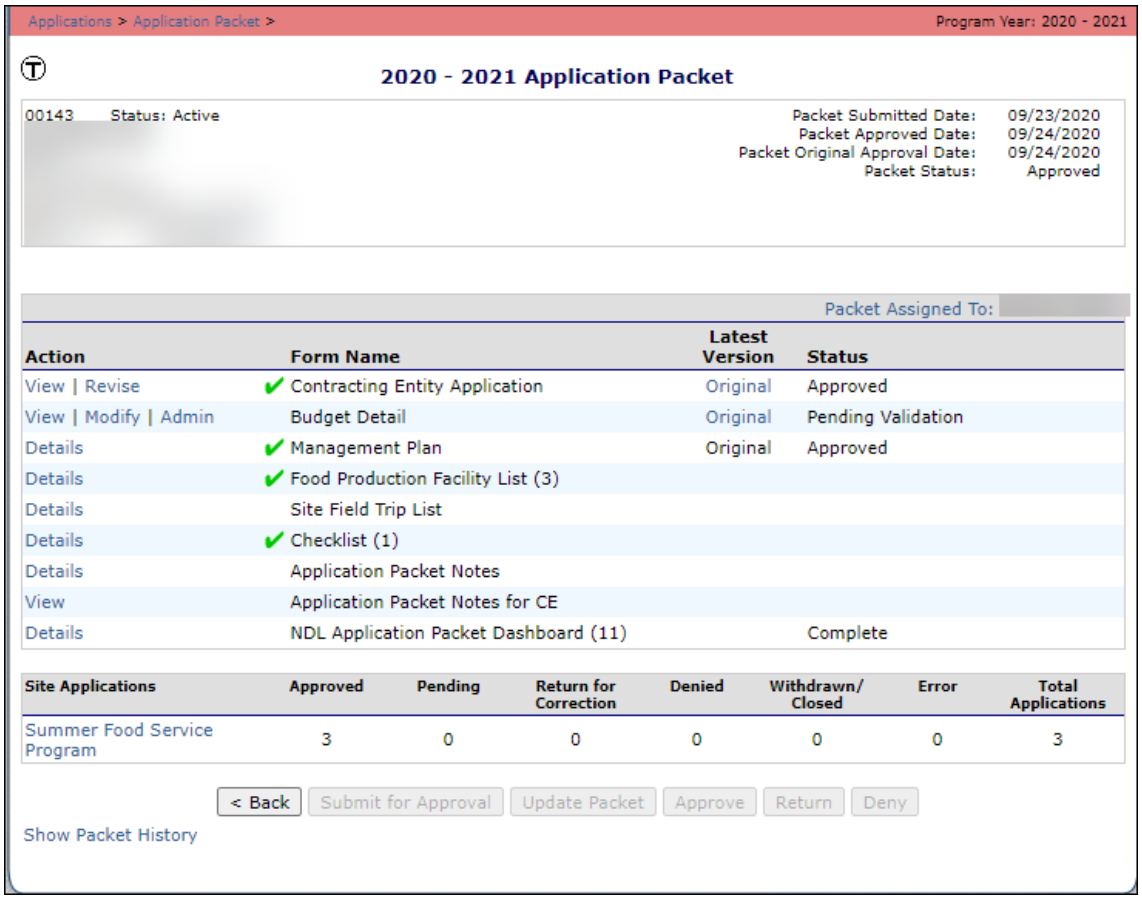

Figure 15: Application Packet Screen

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

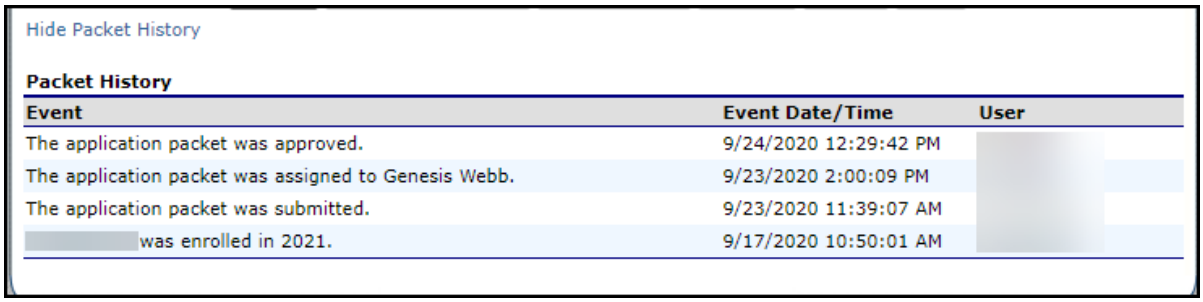

Figure 16: Packet History Screen

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4.3 Contracting Entity Manager Menu

The Contracting Entity Manager menu allows authorized State users to access the Contracting Entity Profile, Site Manager, Batch Holds, Payment Holds, and Technical Assistance functions.

4.3.1 Accessing the Contracting Entity Manager Menu

1. On the blue menu toolbar, select **Applications** to access the menu screen.
2. On the menu, select **Contracting Entity Manager**. If a Contracting Entity has already been selected, the Contracting Entity Manager Menu screen displays.
3. If no Contracting Entity has been selected, use the Contracting Entity Search feature to search for and select a Contracting Entity.

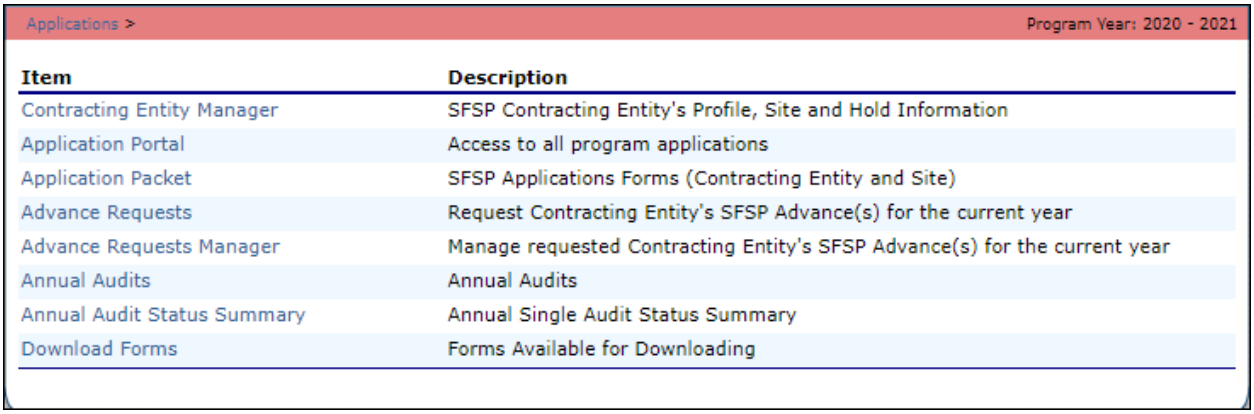

Figure 17: Contracting Entity Manager Menu Screen

The Contracting Entity Profile provides general information on the Contracting Entity. The Contracting Entity Profile data is **not** year specific. It provides general attribute information regarding the Contracting Entity such as name, CE ID, type of agency, and county.

All Contracting Entities must be initially registered through the Contracting Entity Profile screen before an Application Packet can be completed and any additional data can be added to the system. A Contracting Entity cannot be assigned a TX-UNPS User ID until the entity is defined in the system via the Contracting Entity Profile screen.

Please Note: State users also use the Contracting Entity Profile to specify whether the Contracting Entity will report Contracting Entity level or Site level claims. Once these preferences are set in effect starting the following claim month. TX-UNPS functionality will not honor a change to claiming status. (Contracting Entity reporting vs. Site reporting) within a claim month.

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4.3.2 Viewing or Modifying a Contracting Entity

1. On the Applications menu, select **Contracting Entity Manager**.
2. Search for and select a **Contracting Entity** using the Contracting Entity Search (if necessary).
3. Once a Contracting Entity has been selected, select **Contracting Entity Profile**.
4. Modify any **information** within the profile.
5. Select **Save**. If no errors exist, a confirmation screen displays.
6. Select **<Edit** to return to the recently modified Contracting Entity Profile screen or select **Finish** to return to the Contracting Entity Manager menu.

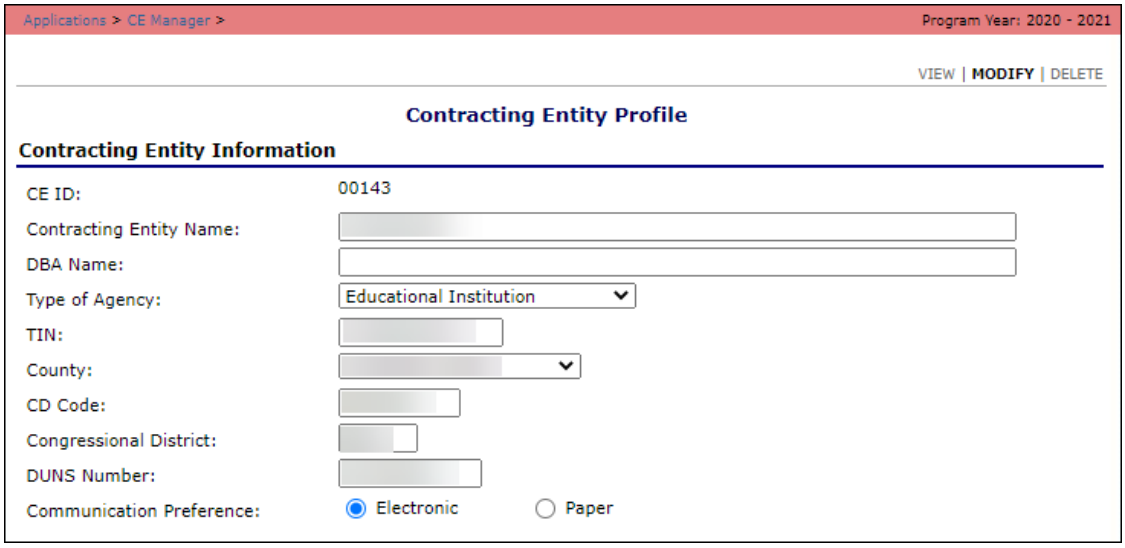

Figure 18: Contracting Entity Profile (Partial Screen)

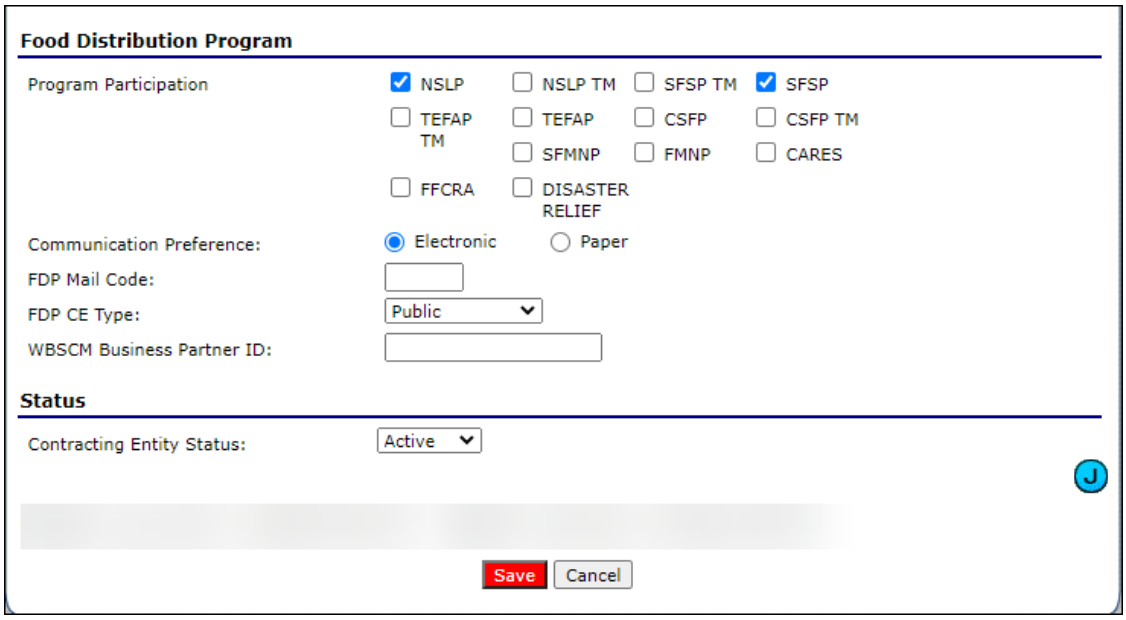

Figure 19: Contracting Entity Profile (Partial Bottom of Screen)

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7. A **confirmation screen** will display.

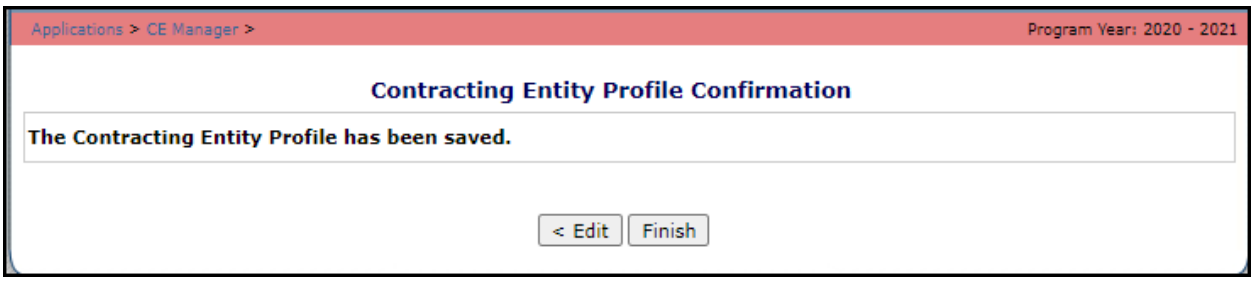

Figure 20: Contracting Entity Profile Confirmation

4.3.3 Deleting a Contracting Entity Profile

1. On the Applications menu, select **Contracting Entity Manager**.
2. Search for and select a **Contracting Entity** using the Contracting Entity Search.
3. Once a Contracting Entity has been selected, click **Contracting Entity Profile.**
4. On the **Edit** menu, select **Delete**. A warning displays.

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

5. Select **Delete** to receive a confirmation.
6. Select **Finish** to return to the Contracting Entity Manager menu.

Tip: *To retain history on a Contracting Entity, change their Status to Inactive instead of deleting the profile.*

4.4 Site Manager

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

4.4.1 Accessing Site Manager

1. On the blue menu toolbar, select **Applications** to access the screen.
2. On the Applications menu, select **Contracting Entity Manager.** If a Contracting Entity has already been selected, the Contracting Entity Manager menu screen displays. If no

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Contracting Entity has been selected, use the Contracting Entity Search to find and select a **Contracting Entity.**

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

4.4.2 Creating a new Contracting Entity Site

1. On the menu toolbar, select **Applications** to access the menu.
2. Select **Contracting Entity Manager**. The Contracting Entity Options menu displays.
3. Select **Site Manager**. The Site Manager menu displays.
4. Select **Create New Site**. A blank Site Profile screen displays.
5. Enter **data**. The system will automatically generate the next available Site ID, but the ID can be overwritten if needed (i.e. for public and charter schools). Site ID must be unique within a Contracting Entity. They are not unique across the system.

Please Note: The site's CD Code defaults to the Contracting Entity's CD Code identified on the Contracting Entity Profile screen.

6. Select the **checkboxes** for the programs in which the site participates.
7. Select **Save** to save the information on the site. The Contracting Entity Site Manager re-displays with the new site added.

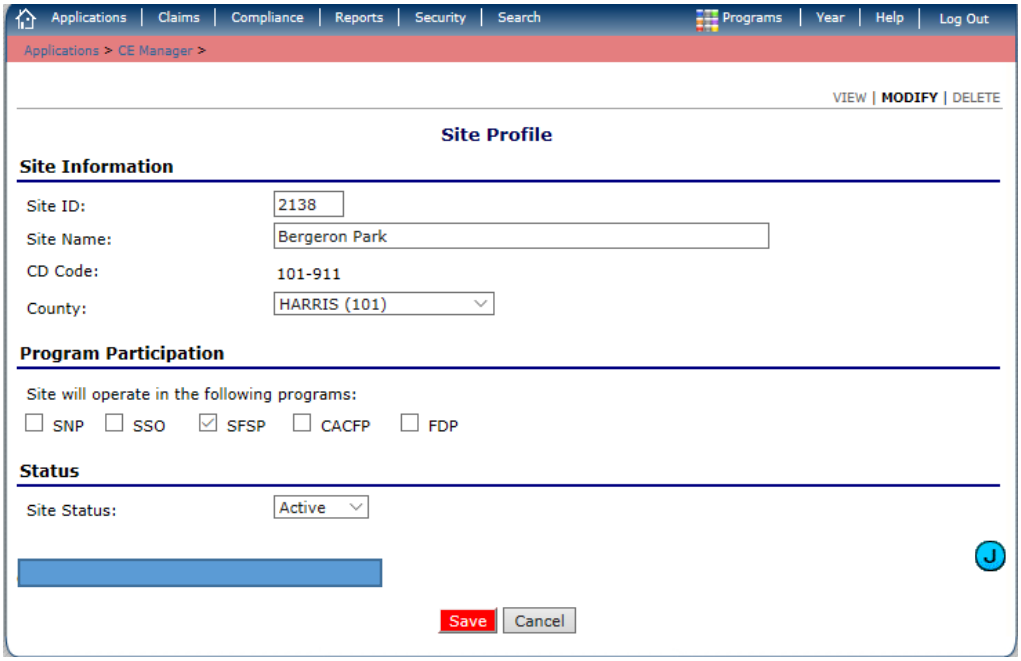

Figure 21: Site Profile Screen

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4.4.3 Viewing or Modifying a Site Profile

1. On the Applications menu, select **Contracting Entity Manager.** If a Contracting Entity has already been selected, the Contracting Entity Manager Menu screen displays. If no Contracting Entity has been selected, use the Contracting Entity Search to search for and select a Contracting Entity.
2. Once a Contracting Entity has been selected, select **Site Manager.** The Contracting Entity Site Manager displays.
3. Select a site to view or modify to access the **Site Profile** screen.

Site ID	Site Name	Status
0002	LEE H S	Active
0003	STERLING H S	Active
0005	PETER E. HYLAND CENTER	Active
0015	GOOSE CREEK MEMORIAL HIGH SCHOOL	Active
0016	IMPACT EARLY COLLEGE H S	Active
0041	BAYTOWN J H	Active
0043	CEDAR BAYOU J H	Active
0044	HIGHLANDS J H	Active
0045	HORACE MANN J H	Active

Figure 22: Site Profile List Screen

4. **Modify** any necessary information within the profile.
5. Select **Save** to obtain a confirmation.
6. Select **<Edit** to return to previous screen or select **Finish** to return to the Contracting Entity Site Manager screen.

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

Contracting Entities may also add sites via the "Quick" Site Profile.

4.4.4 Deleting a Contracting Entity Site

1. On the Applications menu, select **Contracting Entity Manager.** If a Contracting Entity has already been selected, the Contracting Entity Manager Menu screen displays. If no Contracting Entity has been selected, use the Contracting Entity Search to search for and select a Contracting Entity.
2. Once a Contracting Entity has been selected, click **Site Manager.**
3. Select a **site** to delete.
4. Selected **Delete** on the **Edit menu** in the top-right corner.

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5. The system transfers the user to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page to receive a confirmation message.
7. Select **Finish** to return to the Contracting Entity Site Manager screen.

4.5 High-Risk Info

This feature allows the State to track high risk information and history for the Contracting Entity.

4.5.1 Adding a High-Risk Information Entry

1. From the Applications menu, select **Contracting Entity Manager.**
2. Click on the **High-Risk Info link.** The High-Risk Information Detail Screen displays.

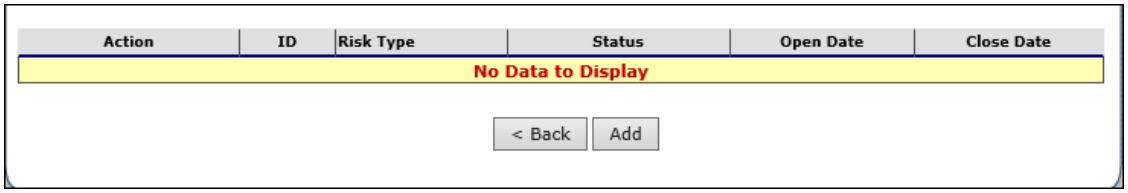

Figure 23: Risk Information Screen

3. Complete all the required **information** on the High-Risk Information Detail screen**.**
4. Select **Save.**

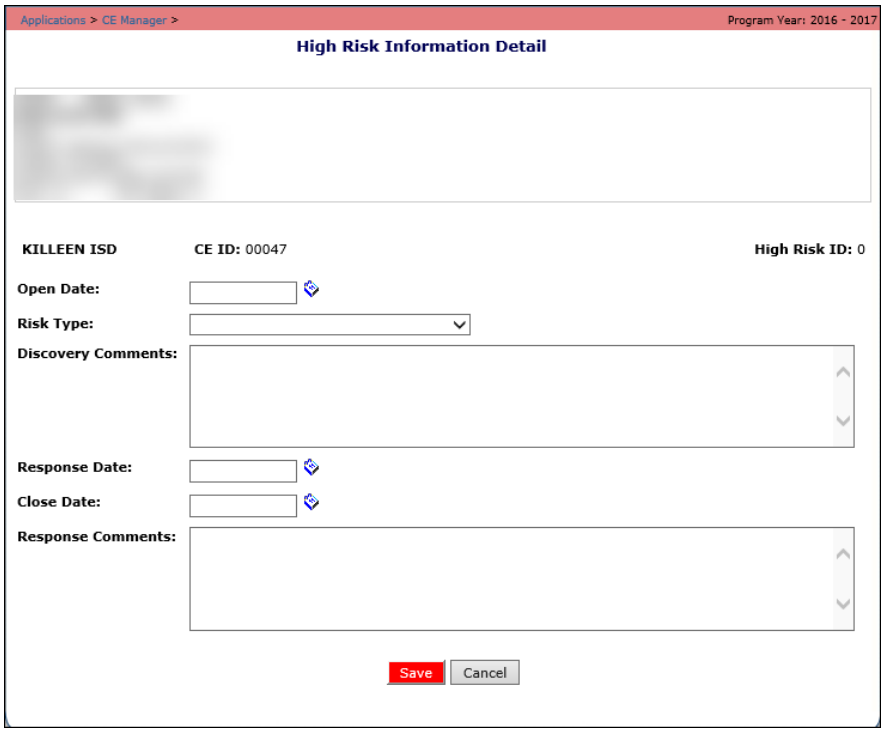

Figure 24: Risk Information Detail Screen

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4.6 Batch Holds

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

Please Note: Creating and removing Batch Holds are only for the selected program year, not for all program years.

4.6.1 Viewing or Modifying a Batch Hold

1. On the Applications menu, select **Contracting Entity Manager.** If necessary, search for and select a Contracting Entity.
2. Once a Contracting Entity has been selected, select **Batch Holds** to access the screen.
3. Make any necessary **modifications.**
4. Select **Save** to receive a confirmation screen.
5. Select **<Edit** to return to the Batch Holds screen you just modified or select **Finish** to return to the Contracting Entity Manager menu screen.

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

4.6.2 Removing a Batch Hold

1. On the Applications menu, select **Contracting Entity Manager.** If necessary, search for and select a **Contracting Entity.**
2. Once a Contracting Entity has been selected, select **Batch Holds.** The Batch Holds screen displays.
3. Uncheck the **All Months** checkbox.
4. Select the **blank space** from the drop-down menu for the Reason Code.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Batch Holds screen or select **Finish** to return to the Contracting Entity Manager menu screen.

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4.7 Payment Holds

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

Please Note: Creating and removing Payment Holds are only for the selected program year, not for all program years.

4.7.1 Viewing or Modifying a Payment Hold

1. On the Applications menu, select **Contracting Entity Manager.**
2. Select **Payment Holds** to access the screen.
3. Make **modifications.**

Tip: *The Payment Hold Change History provides information regarding when payment holds were placed or removed and the reason for the hold.*

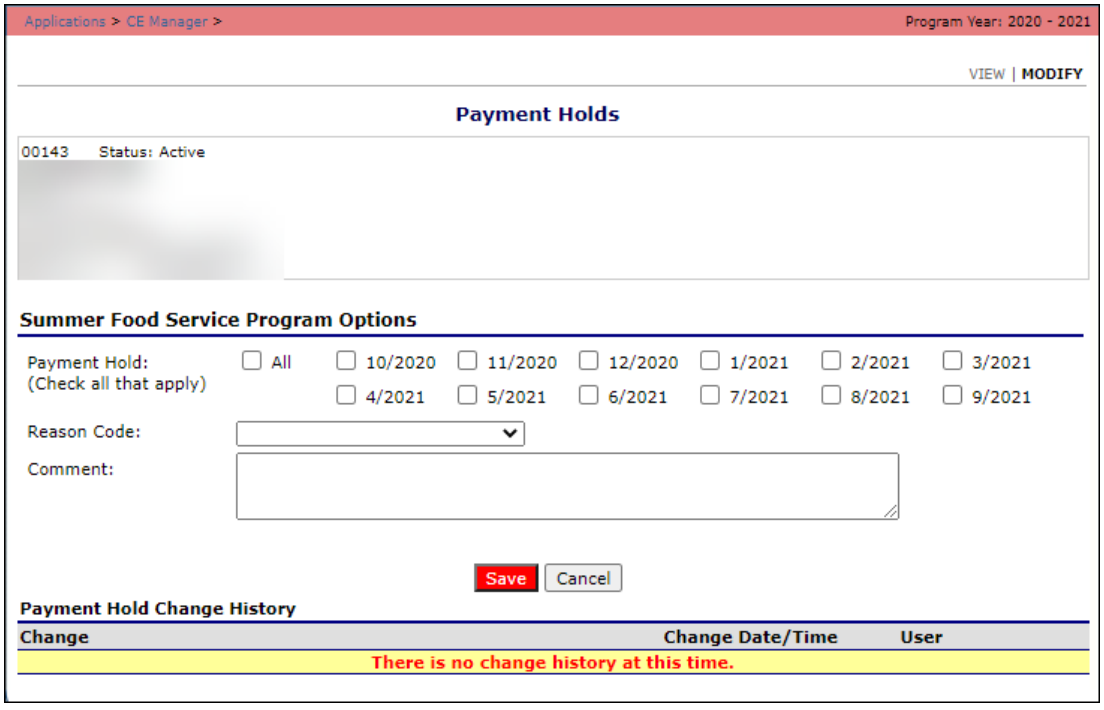

Figure 25: Payment Holds Screen

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4. Select **Save** to receive a confirmation.
5. Select **<Edit** to return to the recently modified Payment Holds screen or select **Finish** to return to the Contracting Entity menu.

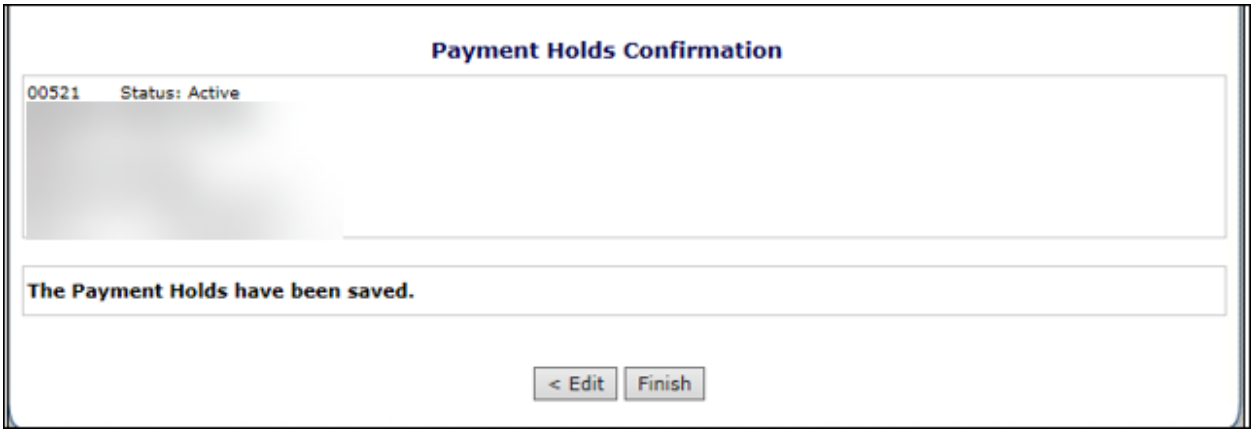

Figure 26: Payment Holds Confirmation Screen

4.7.2 Removing a Payment Hold

1. On the Applications menu, select **Contracting Entity Manager.**
2. Select **Payment holds** to access the screen.
3. Uncheck each **checked month checkbox.**
4. Select the **blank space** from the drop-down menu for the **Reason Code.**
5. Click **Save** to receive a confirmation screen.
6. Select **<Edit** to return to the recently modified Payment Holds screen or select Finish to return to the Contracting Entity menu.

4.8 Technical Assistance

The Technical Assistance (TA) function enables users to view technical assistance requests in a summary dashboard view and in a detailed list. New Technical Assistance entries can be added, while existing ones can be viewed in detail, as well as modified or deleted.

4.8.1 Accessing Technical Assistance

1. On the menu toolbar, click **Applications.** The Application menu screen displays.
2. On the menu, click **CE Manager.**
3. Select **Technical Assistance** from the CE Manager menu screen.

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4.8.2 Adding a Technical Assistance Entry

1. On the menu toolbar, click **Applications.** The Application menu screen displays.
2. Select **CE Manager.**
3. Click **Technical Assistance** to access the screen.
4. Select **Add Technical Assistance.** The Details screen displays.
5. Enter the **required information.**
6. Click **Save** to receive a confirmation.
7. Select **<Edit** to return to the Technical Assistance Detail screen or click **Finish** to return to the Technical Assistance screen.

4.8.3 Modifying a Technical Assistance Entry

1. On the menu toolbar, click **Applications.** The Application menu screen displays.
2. Select **CE Manager.**
3. Click **Technical Assistance** to access the screen.
4. Select the **Technical Assistance entry** to view or modify.
5. Make any necessary **modifications.**
6. Select **Save** to receive a confirmation.
7. Click **<Edit** to return to the Technical Assistance Detail screen or select **Finish** to return to the Technical Assistance screen.

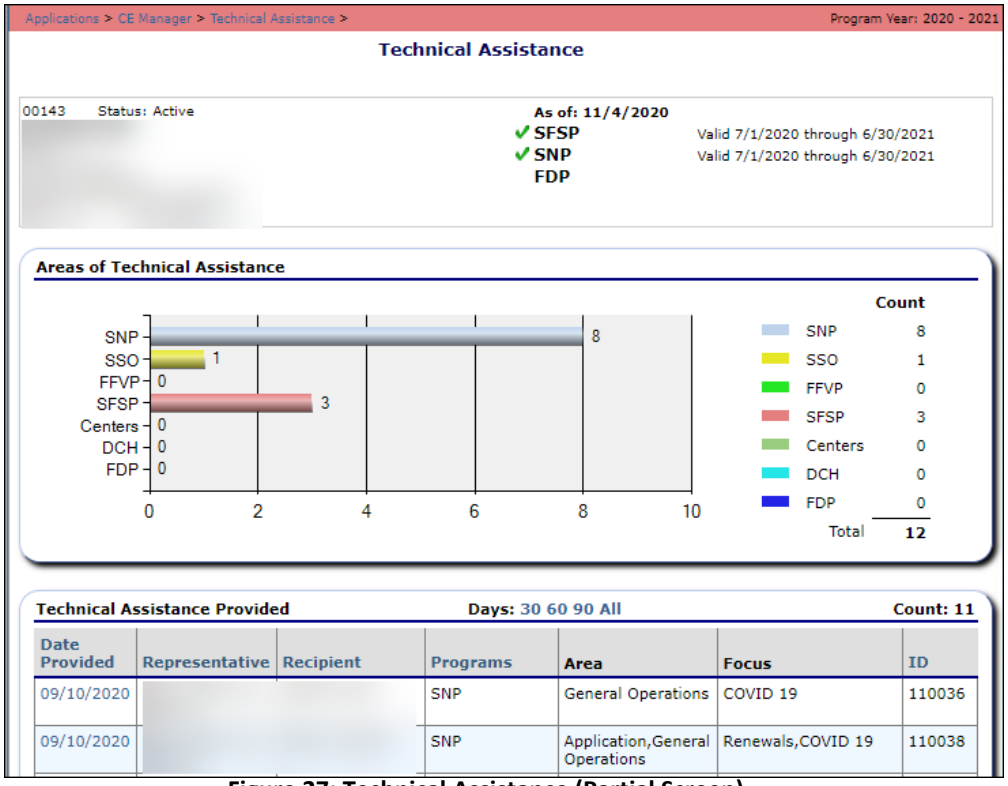

Figure 27: Technical Assistance (Partial Screen)

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4.8.4 Deleting a Technical Assistance Entry

1. On the menu toolbar, click **Applications.** The Application menu screen displays.
2. Select **CE Manager.**
3. Click **Technical Assistance** to access the screen.
4. Select the **Technical Assistance entry** to delete.
5. On the Edit menu, click **Delete.** A confirmation screen displays.
6. Select **Cancel** to return to the Technical Assistance Detail screen without deleting or click **Delete** to confirm deletion of the entry and return to the Technical Assistance screen.

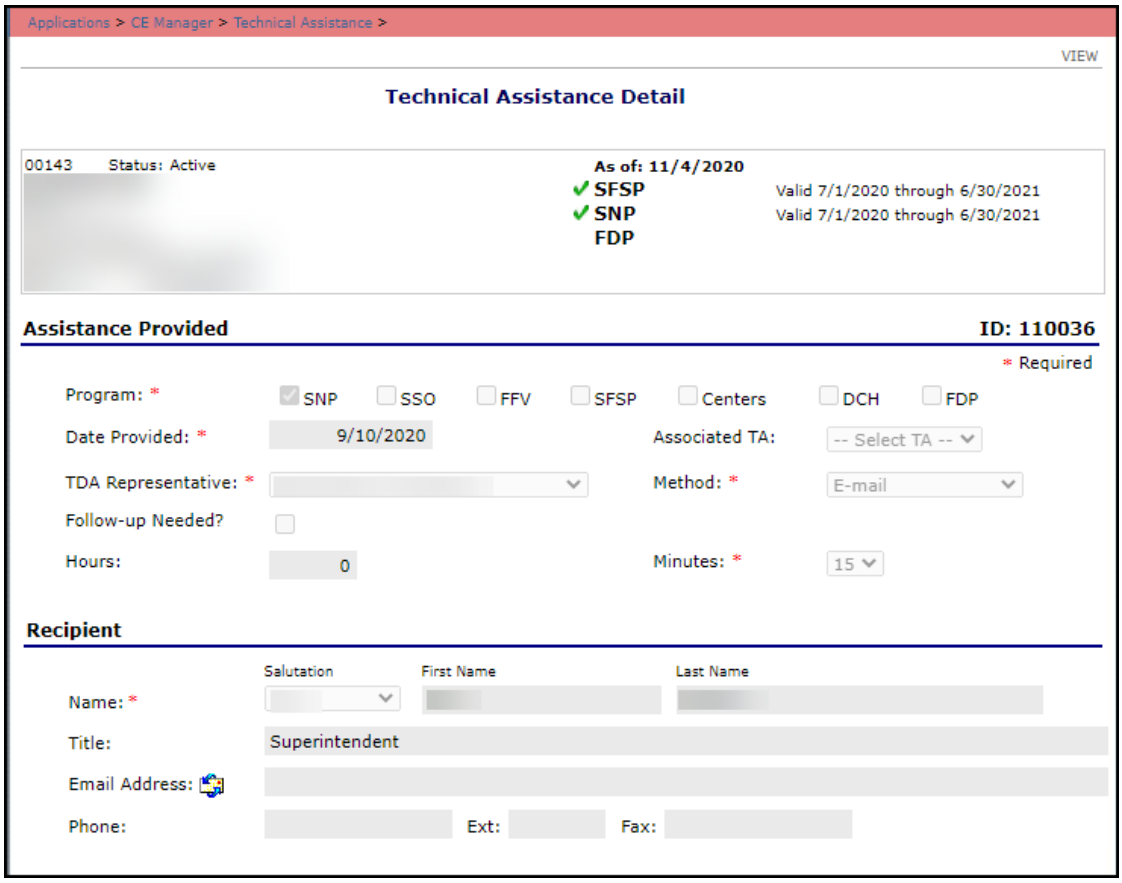

Figure 28: Technical Assistance Details Screen

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4.9 Application Portal

The Application Portal is a “combined program” screen that provides access to information for all program applications.

4.9.1 Application Portal Features

The top half of the Application Portal screen contains the Messages, Application Packet Notes, and Application Packet Notes for CE features. All messages or notes from the SFSP program are compiled into one comprehensive list which is located in each respective category.

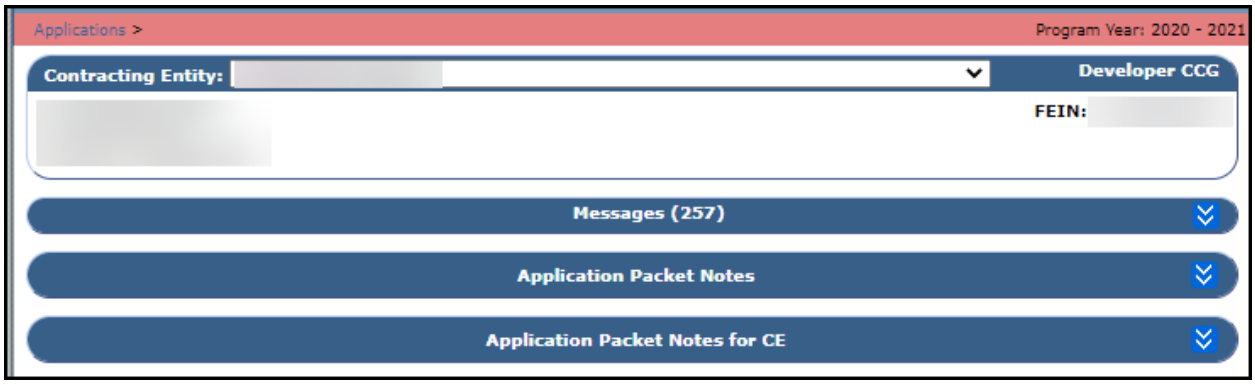

Figure 29: Application Portal Top Half of Screen

Please Note: Visibility to the information will be limited based on user security rights. To view information for each Contracting Entity, security rights will need to be enabled for all programs or features.

4.9.2 Viewing a Message

1. From the Applications menu, select **Applications Portal.**
2. Click the **arrows** to access the Messages feature. A combined list of messages displays.

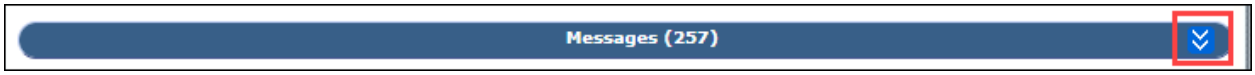

Figure 30: Application Packet Notes Section

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3. Select a **message** to view by clicking the link.

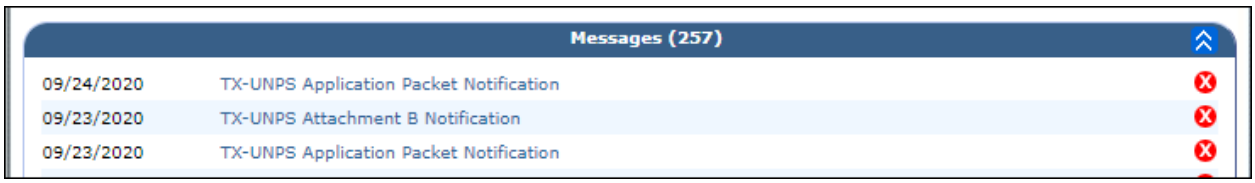

Figure 31: Message List (Partial Screen)

4. The message displays. When finished select **< Back** to return to the Application Portal.

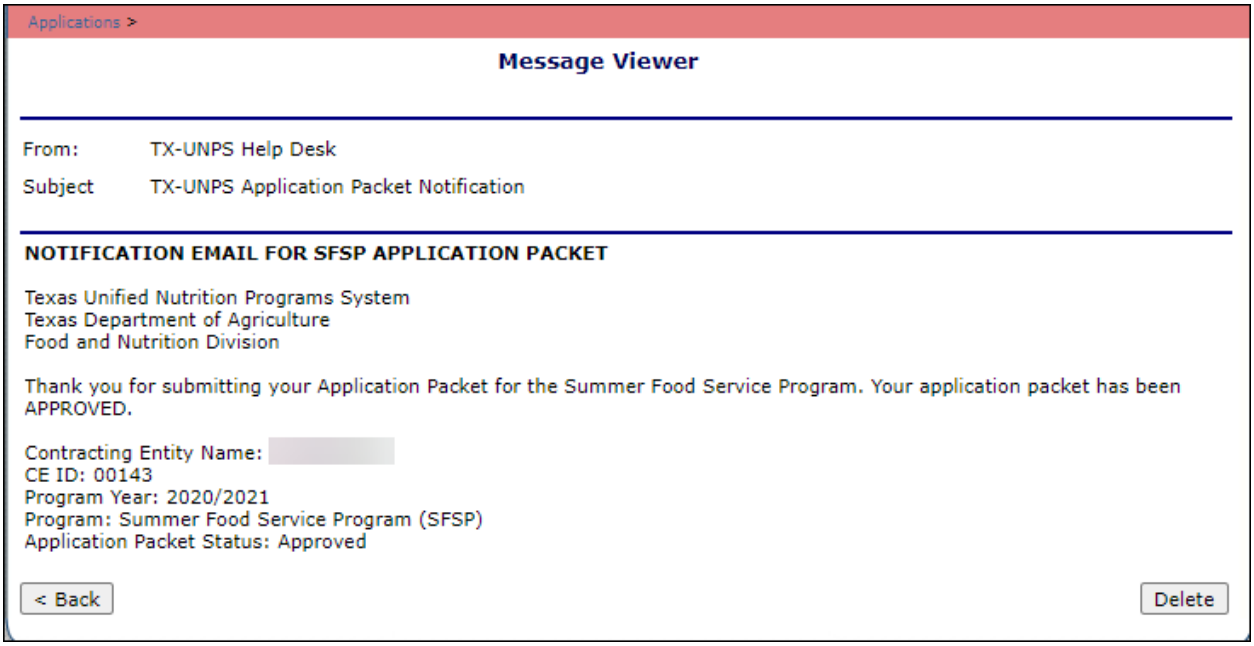

Figure 32: Message Viewer Screen

4.9.3 Deleting a Message

1. Click the **arrows** to access the Messages feature. A combined list of messages displays.
2. Select a **message** to view by clicking the link.
3. Click the **Delete button** located in the bottom-right corner of the message screen.

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4.9.4 Viewing an Application Packet Note

1. From the Applications menu, select **Applications Portal.**
2. Click on the **blue arrows** to expand the Application Packet Notes section.

Figure 33: Application Packet Notes

3. Select a **Date** in the Application Packet Notes section to access the applicable note.

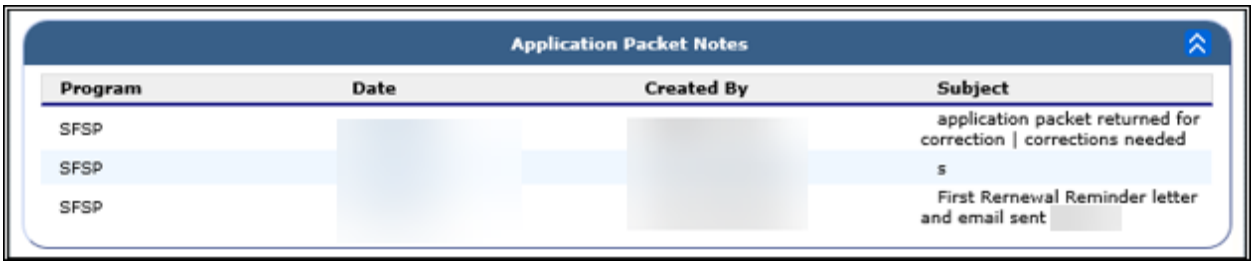

Figure 34: Application Packet Notes List

4. To make the note visible to Contracting Entities, click the **checkbox.**

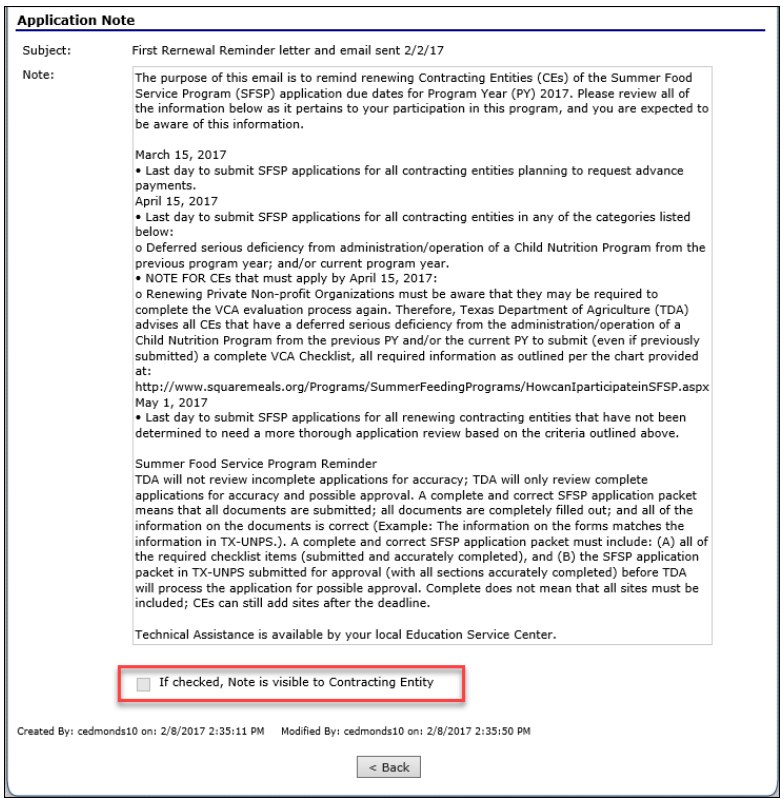

Figure 35: Application Packet Note Screen

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4.9.5 Viewing an Application Packet Note - CE

1. From the Applications menu, select **Applications Portal.**
2. Click on the **blue arrows** to expand the Application Packet Notes – CE section.

Figure 36: Application Packet Note - CE

3. Select a **Date** in the Application Packet Notes – CE section to access the applicable note.

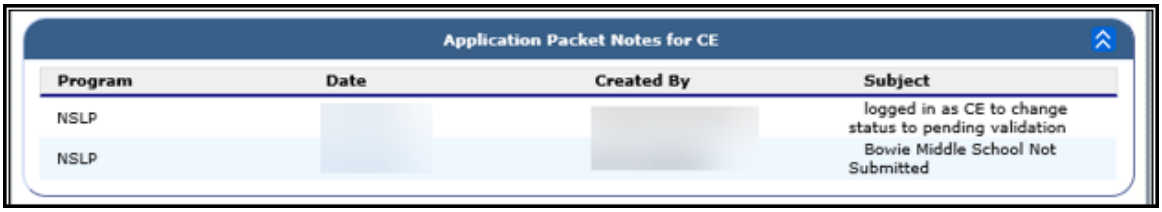

Figure 37: Application Packet Note – CE List

4. The Application Packet Note displays. To ensure the message is visible to the Contracting Entity, click the **checkbox.**
5. Select **< Back** to return to the Application Portal.

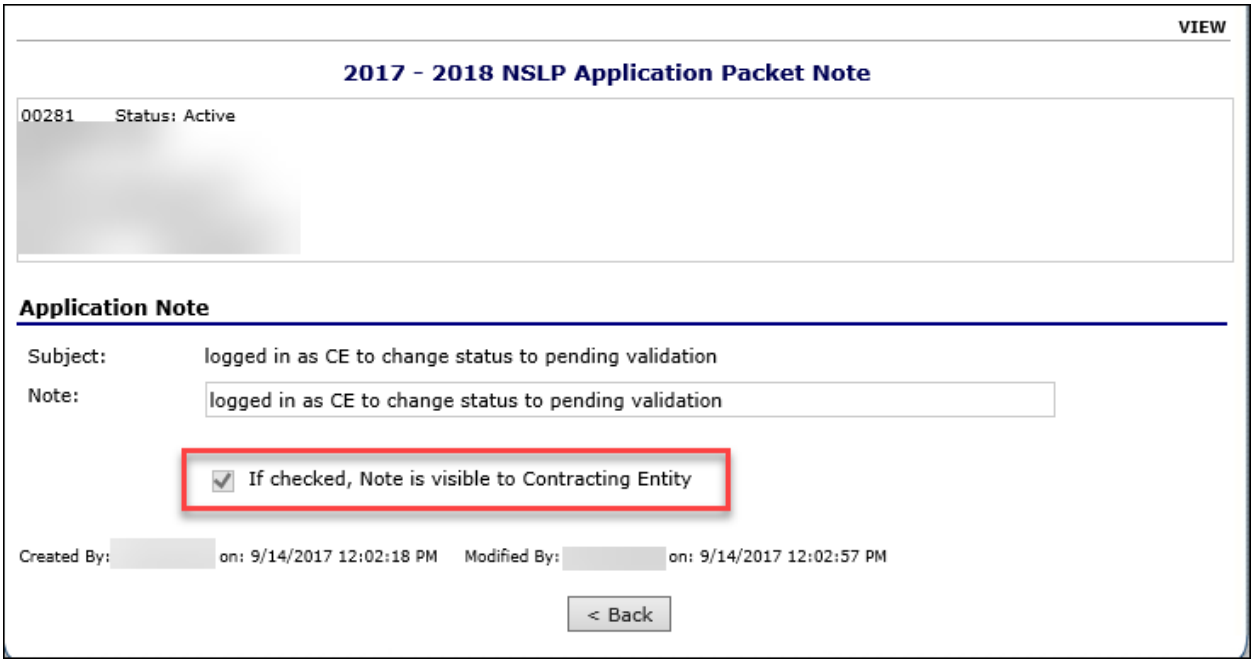

Figure 38: Application Packet Note – CE

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6. Select a **Date** in the Application Packet Notes – CE section to access the applicable note.

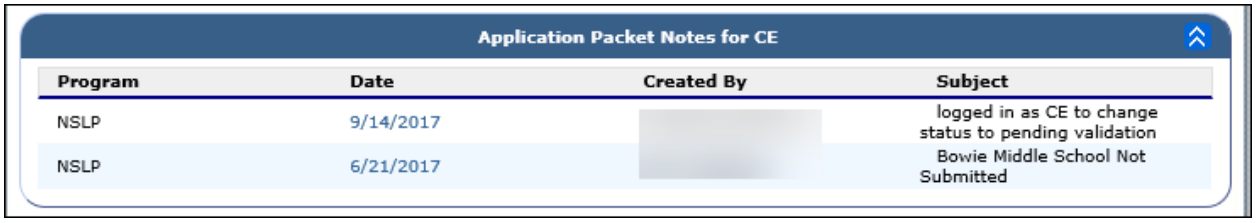

Figure 39: Application Packet Note – CE List

7. The Application Packet Note displays. To ensure the message is visible to the Contracting Entity, click the **checkbox.**
8. Select **< Back** to return to the Application Portal.

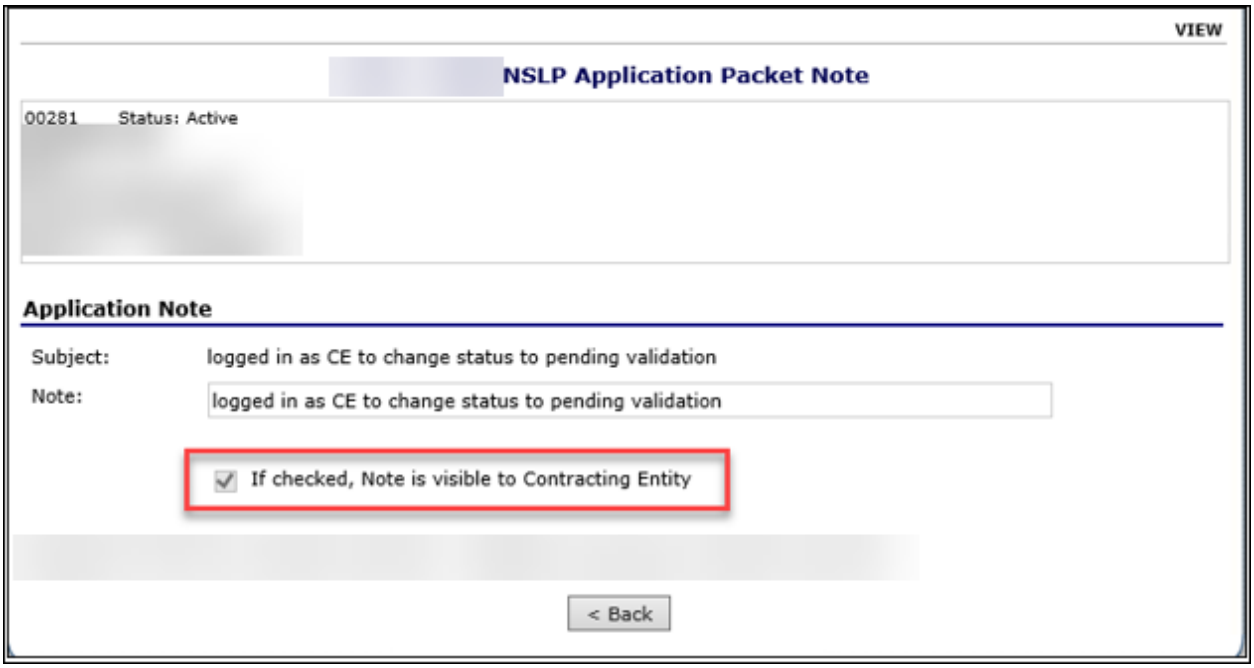

Figure 40: Application Packet Note – CE

4.9.6 Application Portal Contracting Entity Forms

The Application Portal screen also includes the Contracting Entity Forms feature which contains links to each program's Application Packet for direct access to CE and Site documentation.

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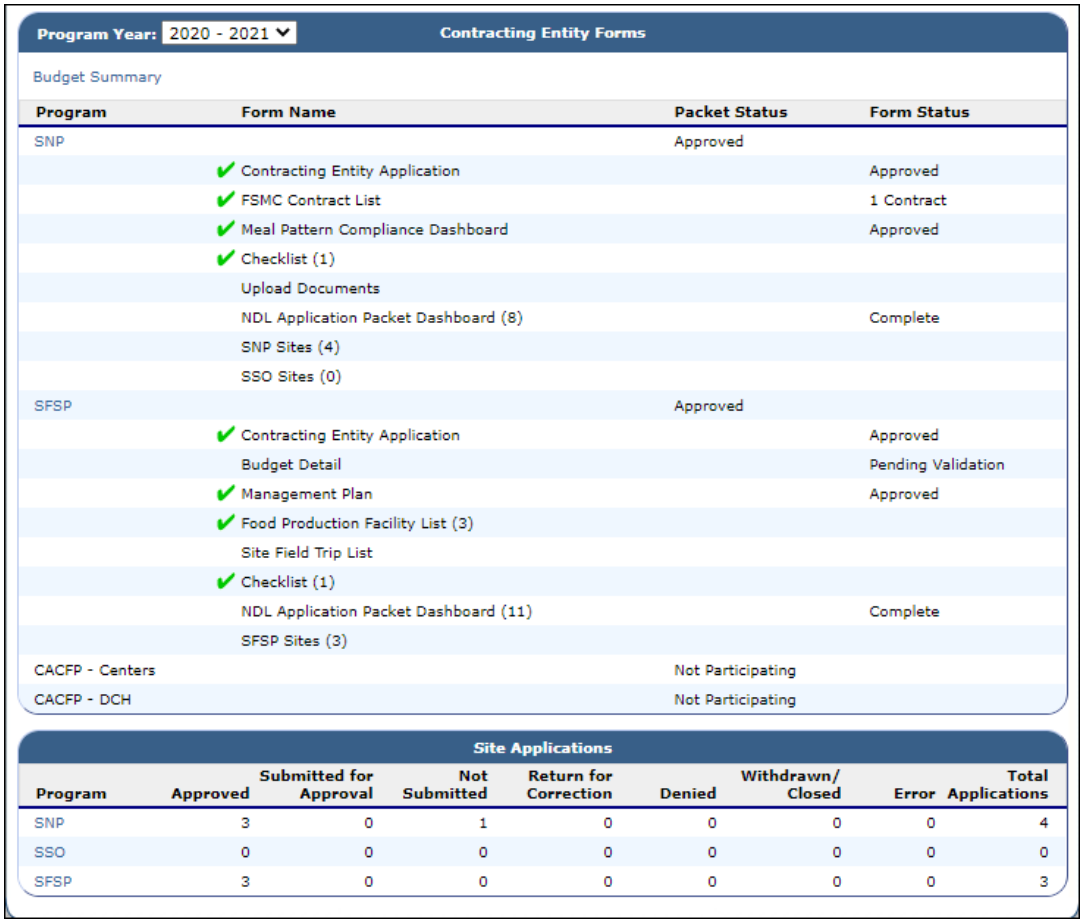

Figure 41: Application Portal Contracting Entity Forms

4.9.7 Selecting the Program Year

1. Select a **year** to access using the drop-down box.

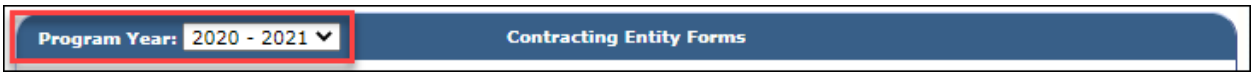

Figure 42: Program Year Option

4.9.8 Viewing the Budget Summary

1. From the Applications menu, select **Applications Portal.**
2. Select the **Budget Summary** link located in the Contracting Entity Forms section.

Figure 43: Budget Summary Link

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3. The Contracting Entity's Budget Summary displays. Once finished, select **< Back** to return to the Application Portal.

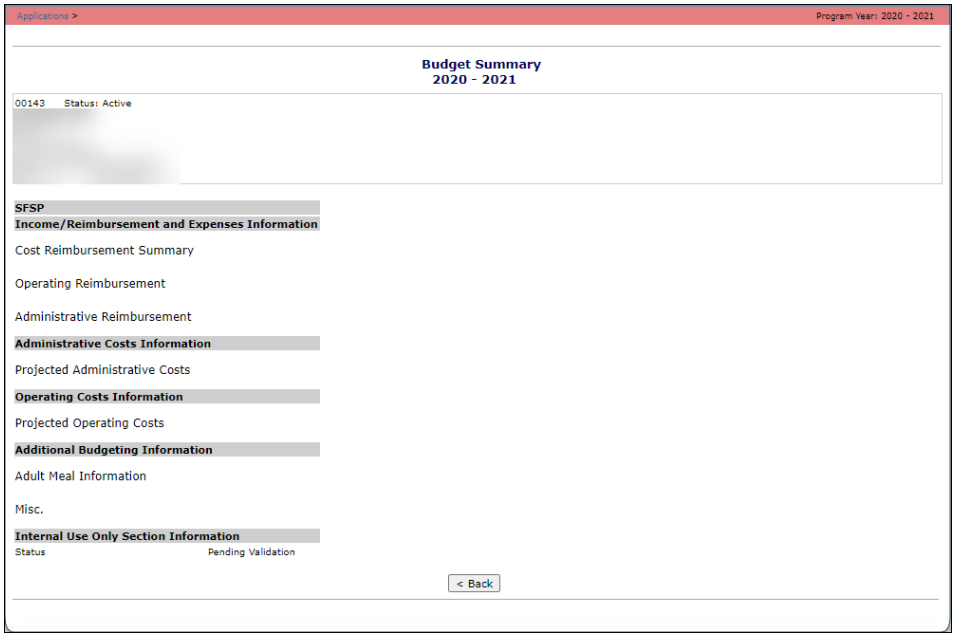

Figure 44: Budget Summary Screen

4.9.9 Viewing or Modifying Contract Entity Forms

1. From the Applications menu, select **Applications Portal.**
2. Select a **Program** from the Application Portal by clicking the **link.** The program's Application Packet displays.
3. Select an **Action** next to the corresponding Form Name
4. Complete the necessary **activities.** For complete details review the directions located in the Application Packet section of the specific program you are working in.
5. Select **< Back** to return to the Application Portal.

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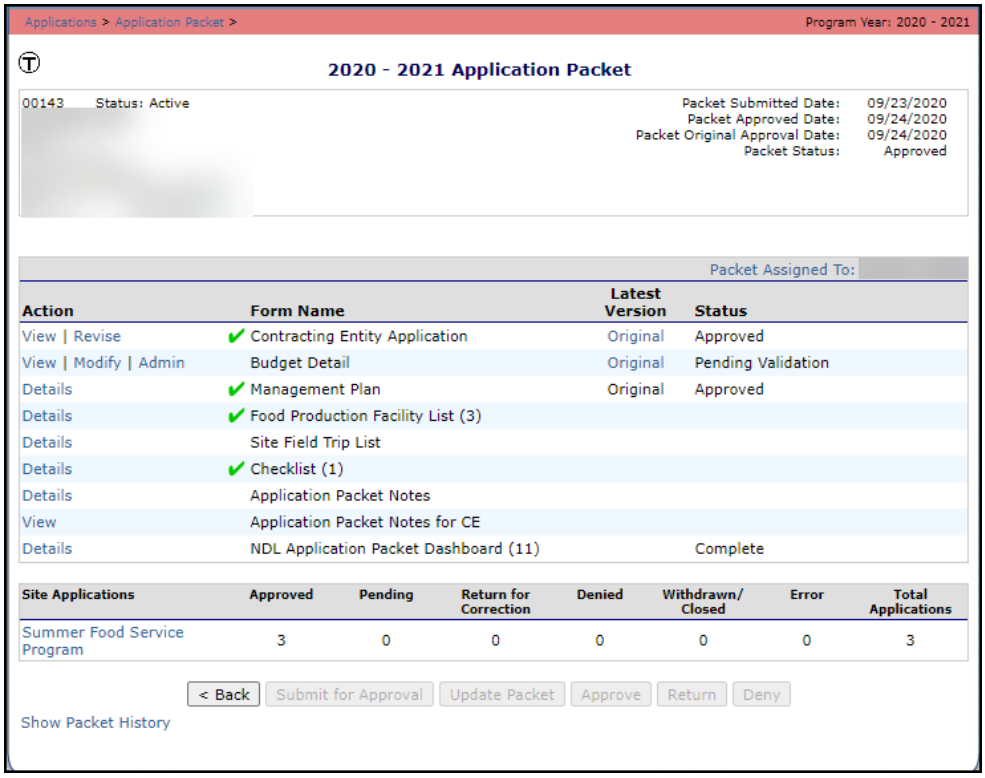

Figure 45: SFSP Application Packet Screen

4.9.10 Viewing or Modifying Site Applications

1. From the Applications menu, select **Applications Portal.**
2. Select a Site Application Program by clicking the **link.** The program's Application Packet displays.

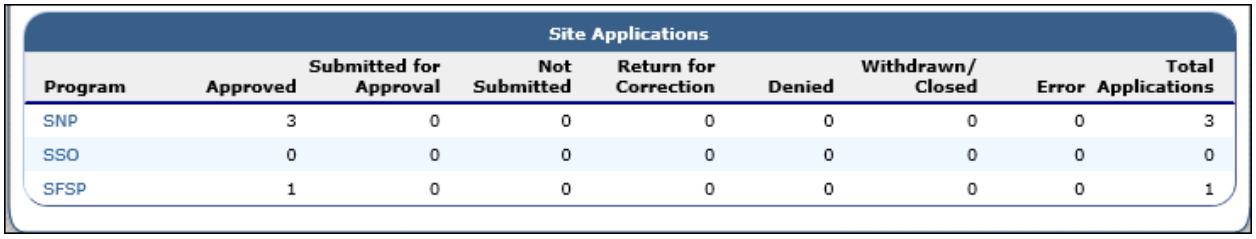

Figure 46: Application Portal Site Applications

3. Select a **Site Application** to access the Site List screen.
4. Select the intended **Action** next to the corresponding Site ID/Site Name.
5. Complete the necessary **activities.** For complete details review the directions located in the Application Packet section of the specific program you are working in.
6. Select **< Back** to return to the Application Portal.

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4.10 Application Packet

To participate in the SFSP, Contracting Entities must submit an Application Packet to the State for review and approval. At the beginning of each program year profile data is rolled over from the prior year's most recent Approved application packet and must be verified by Contracting Entities before submitting any claims. The Contracting Entity would update any invalid information, as well as enter additional data required by the State.

The Application Packet contains the Contracting Entity application, Site application(s), and additional required forms. When completing the application, the screen will display the status of each packet item. A red arrow will appear next to any item that requires attention (such as an error within a form or a checklist item that needs to be completed). Once the Application Packet item has been completed correctly and contains no errors, a green check displays next to the applicable Application Packet item.

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

Please Note: Once an Application Packet has been approved, if a Contracting Entity revises an item within the Application Packet (excluding the Site Field Trip), the Application Packet must be re-submitted for approval. Modifications to the Site Field Trip screen do not initiate the Application Packet approval process.

4.10.1 Accessing the Application Packet

1. On the blue menu toolbar, select **Applications** to access the menu screen.
2. On the menu, select **Application Packet.**
3. Select the applicable **packet item.**

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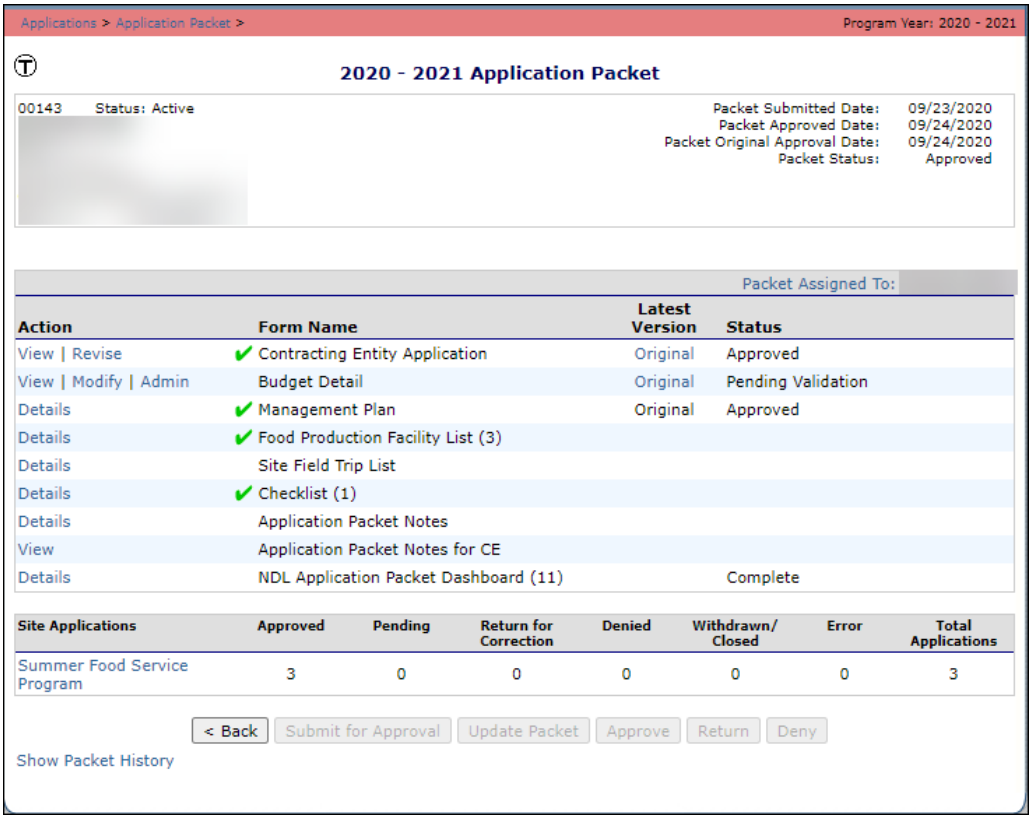

Figure 47: Application Packet Menu Screen

If the Application Packet is under review by the State, it becomes “read only” to the Contracting Entity. The Application Packet screen is displayed with the following message to alert the Contracting Entity that no further modifications can be made to the submitted packet during this time.

Figure 48: Application Packet Message Screen

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4.10.2 Assigning the Application Packet

1. If necessary, search for and select a **Contracting Entity.**
2. On the blue menu toolbar, select **Applications** to access the menu screen.
3. Click **Application Packet.**
4. Select the **Packet Assigned To** link, the Application Assignment screen displays.

Figure 49: Application Packet Message Screen

5. Assign the **packet** to the appropriate staff consultant.

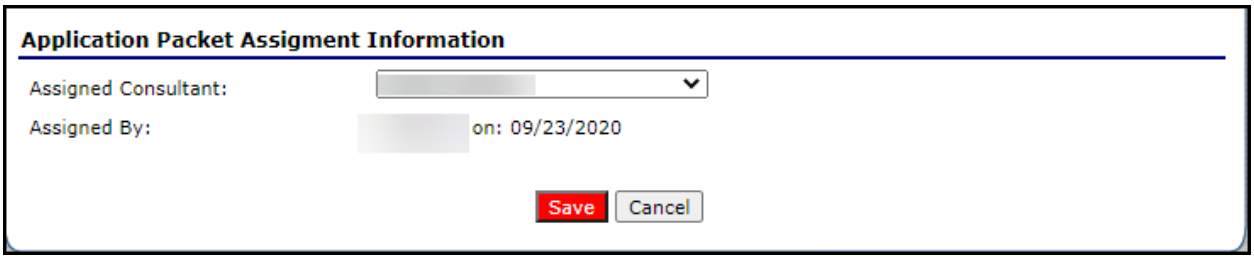

Figure 50: Application Packet Assignment Screen

6. Select **Save** to receive a confirmation.

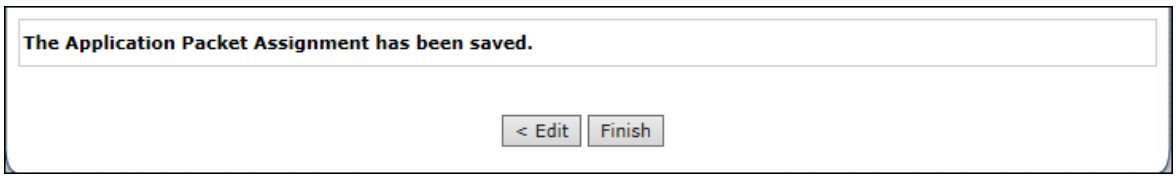

Figure 51: Confirmation Screen

7. Select **<Edit** to return to the recently modified Application Packet Assignment screen or select **Finish** to return to the Application Packet screen.

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4.10.3 Ending a Contracting Entity's Enrollment

1. From the Application's menu, select **Application Packet.**
2. Select the **link under the Latest Version** for the Contracting Entity Application, to access the **History** screen.
3. Select **Close Contracting Entity,** the Agreement screen displays.

Figure 52: Application History Screen

4. Enter the **Closed/Terminated Date.** When the Contracting Entity enters claims, the Days on Operations fields will edit check with this date to ensure meals aren't claimed after the entered date.
5. Select the **Closed/Terminated Date.**
6. Enter the **Closed/Terminated Reason.**
7. The option to provide a reason regarding why the Contracting Entity is ending enrollment in the Closed/Terminated Comment.
8. Select **Save.** The Application History screen is displayed with a message stating that the Contracting Entity's enrollment has ended.

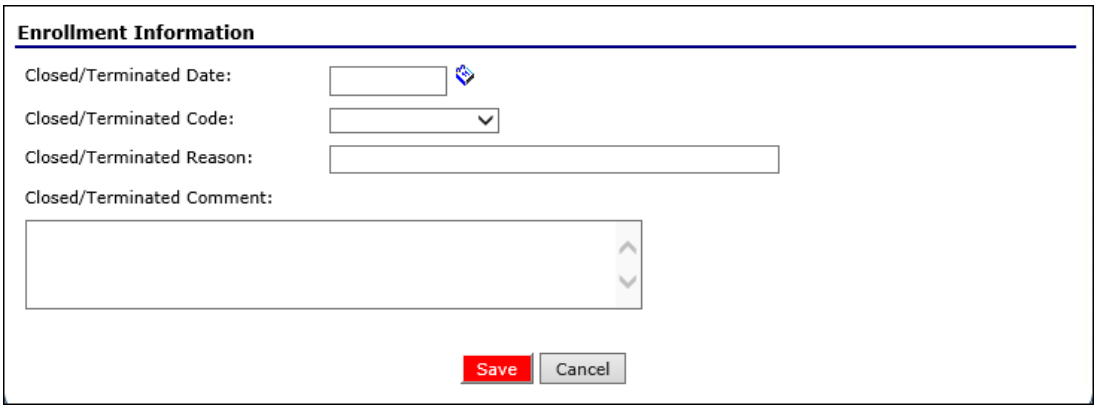

Figure 53: Agreement Screen

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4.10.4 Re-Opening a Closed Contracting Entity

1. From the Applications menu, select **Application Packet** to access the screen.
2. Select **Re-Open Contracting Entity**, the Agreement screen displays.
3. Delete the **Closed/Terminated Date.**
4. Select the **blank space** from the drop-down menu for the Closed/Terminated Code.
5. Click **Closed/Terminated Reason.**
6. Delete the **Closed/Terminated Description.**
7. Once all fields are blank, select **Save** to access the Application History screen.

4.11 Contracting Entity Application

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

4.11.1 Viewing a Contracting Entity Application

1. On the blue menu toolbar, select **Applications.**
2. From the Applications menu, select **Application Packet.**
3. Select **View** next to the Contracting Entity Application packet item, the application for the designated Program Year displays.

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

4.11.2 Viewing a Contracting Entity Application (Revision)

1. On the blue menu toolbar, select **Applications.**
2. From the Applications menu, select **Application Packet** to access the current year's Application Packet screen.
3. Select the **revision link** under the Latest Version column, the Application History for the designated Program Year displays.
4. Select an **application version** to view.

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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 cannot be modified.*

4.11.3 Adding a Contracting Entity Application (New Contracting Entity)

1. On the blue menu toolbar, select **Applications.**
2. From the Applications menu, select **Application Packet** to access the most current year's Application screen.
3. Select **Add** next to the Contracting Entity Application Packet item.
4. Enter required **information**.
5. Select **Save** to receive a confirmation.
6. Select **<Edit** to return to the Contracting Entity Application screen or select **Finish** to return to the Application Packet screen.

Tip: *The Add option only appears for new Contracting Entities. If the Contracting Entity 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.*

4.11.4 Modifying a Contracting Entity Application

1. On the blue menu toolbar, select **Applications.**
2. From the Applications menu, select **Application Packet** to access the current year's **Packet** screen.
3. Select **Modify** next to the Contracting Entity packet item, the application for the designated program year displays.
4. Make any necessary **modifications.**
5. Select **Save** to receive a confirmation.
6. Select **<Edit** to return to the Contracting Entity Application screen or select **Finish** to return to the Application Packet.

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).*

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4.11.5 Deleting a Contracting Entity Application

1. On the blue menu toolbar, select **Applications.**
2. From the Applications menu, select **Applications Packet** to access the screen.
3. Select **Modify** next to the Contracting Entity Application Packet item, the application for the designated program year displays.
4. Select **Delete** on the Edit menu is the top-right corner.
5. The system transfers the user to the bottom of the screen and a warning message displays.
6. Select the **Delete** button at the bottom of the page to receive a confirmation message displays.

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

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

4.11.6 Revising a Contracting Entity Application

1. On the blue menu toolbar, select **Applications.**
2. From the Applications menu, select **Application Packet** to access the most current year's application screen displays.
3. Select **Revise** next to the Contracting Entity Application packet item, the designated Program Year is displayed.
4. Make any necessary **modifications.**
5. Select **Save** to receive a confirmation screen.
6. Select **<Edit** to return to the recently modified Contracting Entity Application 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.*

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4.11.7 Entering Internal Use Only Information

1. From the Applications menu, select **Application Packet** to access the most current year's Application screen.
2. Select **Admin** next to the Contracting Entity Application packet item. The Contracting Entity Application for the designated **Program Year** is displayed.
3. Enter information in the **Internal Use Only** section.
4. Select **Save Internal Use Only** to receive a confirmation screen.
5. Select **<Edit** to return to the Contracting Entity Application screen or select **Finish** to return to the Application Packet screen.

Tip: If you are viewing an application and have the security rights to update the Internal Use Only section, the user can also select INTERNAL USE ONLY on the Edit menu in the top-right corner of the application screen to access the Internal Use Only section of the screen.

4.12 Site Applications – Summer Food Service Program

Contracting Entities must complete a Site Application for each of their sites. The Site Application screen provides access to the Site's annual application for the Summer Food Service Program for both new and renewing sites. Sites must complete a new application annually; however, if an application is contained within the system from the previous year, the State has identified select application data that rolls over from the previous year and pre-fills a new year's application.

4.12.1 Accessing the Contracting Entity's Site List

1. From the Applications menu, select **Application Packet**.
2. Under Site Applications, select **Summer Food Service Program**.

.

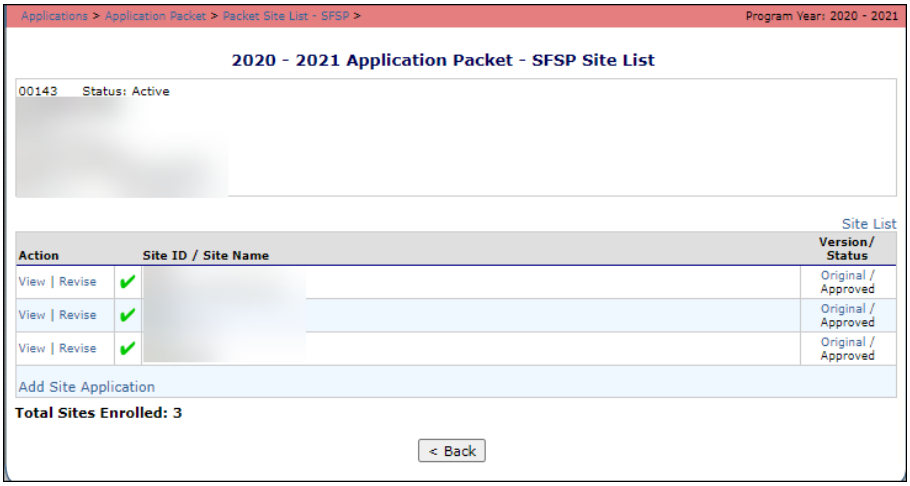

Figure 54: SFSP Site List Screen

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4.12.2 Adding a New Site (Available to Contracting Entities)

1. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
2. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
3. At the bottom of the site list, select **Add Site Application.** The SFSP Available Site(s) screen displays.

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

4. To add an application to a site that is listed, select the site. If the site is not listed, select **Add New Site.** The 'Quick' Site Profile screen displays.
5. The system automatically defaults the Site ID to the next available Site ID for this Contracting Entity.

Tip: *For most Contracting Entities, it is highly recommended that you use the* ***Site ID*** *assigned by the system. The system has verified that the assigned ID is unique and is the next available* ***Site ID*** *for the* ***Contracting Entity.***

6. Enter the **Site Name** and **County**.
7. Select **Save.** The Site Application for the new site is displayed.

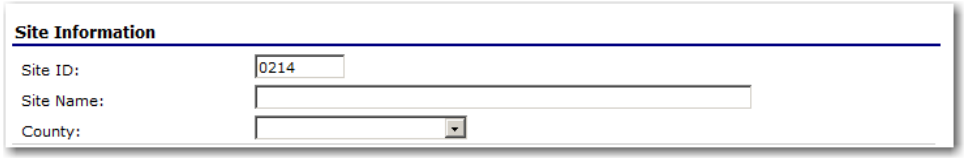

Figure 55: 'Quick' Site Profile Screen

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4.12.3 Viewing a Site Application

1. From the Applications menu, select **Application Packet** to access the current year's Application screen.
2. Under Site Applications menu, select **Summer Food Service Program**. The Application Packet – SFSP Site List screen displays.
3. Select **View** next to the applicable site application to access the screen.

4.12.4 Modifying a Site Application

1. On the blue menu toolbar, select **Applications**.
2. From the Applications menu, select **Application Packet** to access the screen.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet – SFSP Site List screen displays.
4. Select **Modify** next to the applicable site. The Site Application screen is displayed
5. Make any necessary **modifications.**
6. Select **Save** to receive a confirmation.
7. Select **<Edit** to return to the Site Application screen or select **Finish** to return to the SFSP Site List screen.
8. Repeat **Steps 4 through 7** for each site that will participate in the program.

4.12.5 Deleting a Site Application

1. On the blue menu toolbar, select **Applications.**
2. From the Applications menu, select **Application Packet** to access the current year's **Application screen.**
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. Select **Modify** next to the site whose application is to be deleted.
5. Select **Delete** on the Edit menu in the top-right corner.
6. The system transfers the user to the bottom of the screen and a warning message is displayed.
7. Select the **Delete button** to receive a confirmation message.

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.

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4.12.6 Revising a Site Application

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

Once a Contracting Entity revises any item within the Application Packet, the Application Packet must be re-submitted, and the State review and approval process starts again.

1. From the Applications menu, select **Application Packet** to access the Application screen for the current year.
2. Under Site Applications, select **Summer Food Service Program**. The Application Packet – SFSP Site List screen displays.
3. Select **Revise** next to the site whose application is to be modified.
4. Modify any desired **information.**

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

5. Select **Save** to receive a confirmation.
6. Select **<Edit** to return to the Site Application screen or select **Finish** to return to the SFSP Site List screen.

4.12.7 Entering Internal Use Only Information

1. From the Applications menu, select **Application Packet** to access the screen for the current year's packet.
2. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
3. Select **Admin** next to the applicable site to review the application.
4. Enter information in the **Internal Use Only section.**
5. Select **Save Internal Use Only** to receive a confirmation.

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6. Select **<Edit** to return to the Site Application screen or select **Finish** to return to the SFSP Site List screen.

__Tip:__ If you are viewing an application and have the security rights to update __the Internal Use Only__ section, the user can also select __Internal Use Only__ on the Edit menu in the top-right corner of the application screen to access the __Internal Use Only__ section of the screen.

4.12.8 Closing a Site

Applications cannot be submitted for a site that is closed within the system.

To close a site, follow the steps below:

1. From the Applications menu, select **Application Packet** to access the current year's Application.
2. Under Site Applications, select **Summer Food Service Program.** The Application Packet – SFSP Site List screen displays.
3. Select the **link** under the Version/Status column. The Site Application History screen is displays.
4. Select **Close Site**. The End Site Agreement screen displays.

Figure 56: End Site Agreement Screen

5. Enter the **Closed/Terminated Date**. If the Contracting Entity is entering site level claims, the **Days of Operation fields** for this site will edit check with this date to ensure meals aren't claimed after the entered date.
6. Select the **Closed/Terminated Code**.
7. Enter the **Closed/Terminated Reason**.
8. If desired, provide a description as to why the site is being closed in the **Closed/Terminated Comment**.

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

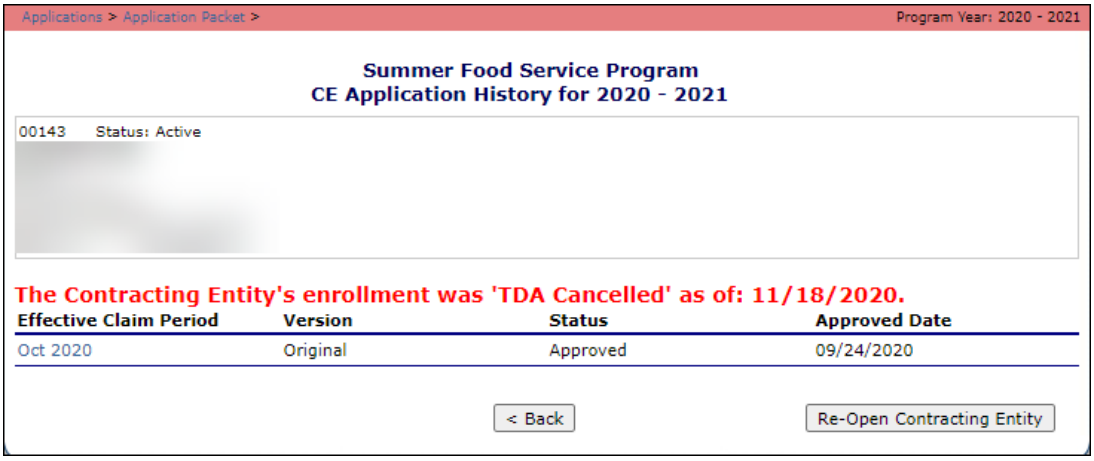

Figure 57: Example of a Confirmation of a Closed Site

4.12.9 Re-Opening a Closed Site

1. From the Applications menu, select **Application Packet** to access the current year's Application screen.
2. Under Site Applications, select **Summer Food Service Program.** The Application Packet – SFSP Site List screen displays.
3. Select the **link** under the **Version/Status column**. The Site Application History screen displays.
4. Select **Re-Open Site**. The End Site Agreement screen displays.
5. Delete the **Closed/Terminated Date.**
6. Select the blank space from the drop-down menu for the **Closed/Terminated Code**.
7. Delete the **Closed/Terminated Reason**.
8. Delete the **Closed/Terminated Description**.
9. Once all fields are blank, select **Save**. The Site Application History screen displays.

4.13 Budget Detail

The Budget Detail screen must be completed annually by Contracting Entities. The system will not allow an Application Packet to be submitted without completion of the Budget Detail screen, with no errors.

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

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4.13.1 Accessing the Budget Detail

1. On the menu screen, select **Application Packet**.
2. Select **View** next to Budget Detail. The most current Budget Detail screen displays.

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

4.13.2 Adding a Budget Detail

1. On the menu, select **Application Packet**.
2. Select **Add** next to Budget Detail. A blank Budget Detail screen displays.
3. Complete the **form.**
4. Select **Save** to receive a confirmation.
5. Select **<Edit** to return to the Budget Detail screen or select **Finish** to return to the Application Packet screen.

Please Note: The staff and budget category titles are links. When the link is selected by the user, a secondary window or table is displayed to enter data. The category can be collapsed by selecting "Close".

4.13.3 Viewing a Budget Detail

1. From the Applications menu, select **Application Packet** to access the current year's Application Packet.
2. Select **View** next to Budget Detail, the screen of the most current version displays.
3. To view a prior Budget Detail, select the **revision link** under the Latest Version column. The Contracting Entity's Budget History for the designated **Program Year** displays.

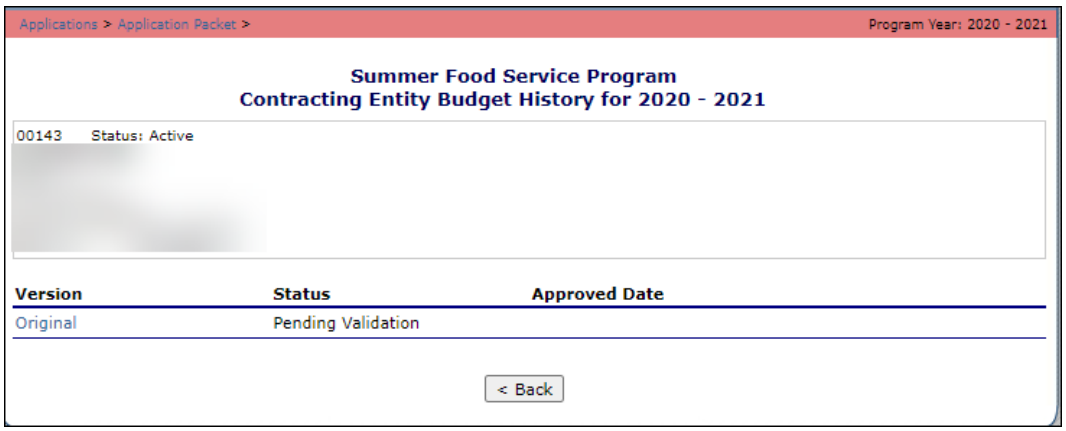

Figure 58: Budget History Screen

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4. Select the **budget version** to view.

4.13.4 Modifying a Budget Detail

1. On the menu, select **Application Packet**, the screen displays.
2. Select **Modify** next to Budget Detail. The Budget Detail screen displays with the most current, un-submitted budget data.
3. Modify any necessary **information.**
4. Select **Save** to receive a confirmation.
5. Select **<Edit** to return to the Budget Detail screen or select **Finish** to return to the Application Packet screen.

4.13.5 Revising a Budget Detail

1. On the menu, select **Application Packet**.
2. Select **Revise** next to Budget Detail. The screens display the most current budget data.
3. Make any necessary **modifications.**
4. Select **Save** to receive a confirmation.
5. Select **<Edit** to return to the Budget Detail screen or select **Finish** to return to the Application Packet screen.

Tip: *When creating a revision, the system maintains the previously-approved budget that can be accessed via the Contracting Entity Budget History screen.*

4.13.6 Reviewing a Budget Detail

1. On the menu, select **Application Packet**.
2. Select **Admin** next to Budget Detail List. The Budget Detail screen displays.
3. The Detail screen will exhibit the submitted budget information for review.
4. Enter information in the **Internal Use Only section.**
5. Select **Save Internal Use Only** to receive a confirmation screen**.**
6. Select **<Edit** to return to the **Budget Detail screen** select Finish to return to the

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

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Application Packet screen.

4.14 Management Plan

Contracting Entities must submit a Management Plan as part of the Application Packet. The system will not allow an Application Packet to be submitted without completion of the Management Plan screen, with no errors. Once a Management Plan is approved, a revision (i.e., a new version) must be created.

4.14.1 Accessing the Management Plan

1. On the menu, select **Application Packet**.
2. Select **Details** next to Management Plan. Select the **version of Management Plan** to **view**. The Management Plan screen displays.

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

4.14.2 Adding a Management Plan

1. On the menu, select **Application Packet**.
2. Select **Details** next to Management Plan. Select **Original** under the version column. A blank Management Plan screen displays.
3. Complete the **form.**
4. Select **Save** to receive a confirmation.
5. Select **<Edit** to return to the Management Plan screen or select **Finish** to return to the Application Packet screen.

4.14.3 Viewing a Management Plan

1. From the Applications menu, select **Application Packet** to access the most current year's Application Packet screen.
2. To view the most current Management Plan, select **Details** next to Management Plan or to view a prior Management Plan, select the **revision link** under the Version column. The Contracting Entity Management Plan History for the designated program year displays.

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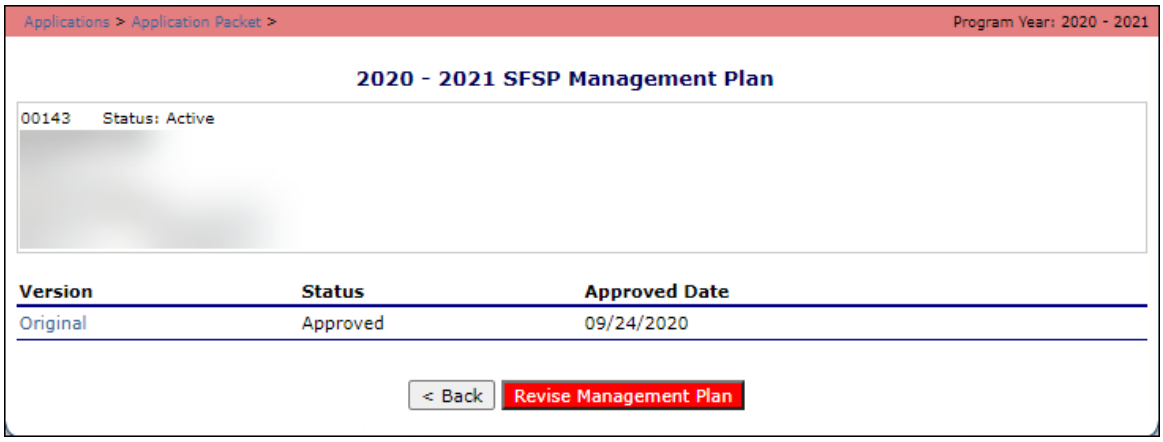

Figure 59: Management Plan Screen

3. Select the **Management Plan version** for review.

4.14.4 Modifying a Management Plan

1. On the menu, select **Application Packet**.
2. Select **Details** next to **Management Plan**.
3. Select the **version** to modify. **Modify** any desired information.
4. Select **Save** to receive confirmation.
5. Select **<Edit** to return to the Management Plan screen or select **Finish** to return to the Application Packet screen.

4.14.5 Revising a Management Plan

1. From the menu, select **Application Packet**.
2. Select **Details** next to Management Plan. The Management Plan screen displays with the most current Management Plan data.
3. Select **Revise Management Plan** button. Make any necessary **modifications.**
4. Select **Save** to receive a **confirmation.**
5. Select **<Edit** to return to the Management Plan screen or select Finish to return to the Application Packet or select **Finish** to return to the Application Packet screen.

Tip: *When creating a revision, the system maintains the previously-approved Management Plan that can be accessed via the Contracting Entity Management Plan History screen.*

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4.14.6 Reviewing a Management Plan

1. From the menu select **Application Packet**.
2. Select **Details** next to Management Plan List. The Management Plan screen displays. Select the **version** to be reviewed.
3. Review the **Management Plan** information submitted.
4. Select **Internal Use Only** on the Edit menu in the top-right corner.
5. Enter information in the **Internal Use Only** section.
6. Select **Save Internal Use Only** to access a confirmation.
7. Select **<Edit** to return to the Management Plan screen or select **Finish**.

Tip: *Authorized users can also access the Internal Use Only section by selecting Revise next to the Management Plan option on the Application Packet screen and then selecting Internal Use Only at the top-right of the Management Plan screen.*

4.15 Food Production Facility

The Food Production Facility section of the Application Packet contains information about each food production facility that the Contracting Entity will use to provide meals to its sites. This includes vended meals and central kitchen services.

4.15.1 Accessing the Food Production Facility List

1. On the menu, select **Application Packet**.
2. Select **Details** next to Food Production Facility List, the list screen displays.

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Figure 60: Food Production Facilities List Screen

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4.15.2 Adding a Food Production Facility List

1. On the menu, select **Application Packet**.
2. Select **Details** next to Food Production Facility List.
3. Select the **Add Facility** button. A blank Food Production Facility screen for the specified year is displayed.
4. Complete the **form.**
5. Select **Save** to receive a confirmation.
6. Select **<Edit** to return to the Food Production Facility screen or select **Finish** to return to the Food Production Facilities list screen.

4.15.3 Modifying a Food Production Facility List

1. On the menu, select **Application Packet**.
2. Select **Details** next to Food Production Facility List.
3. Select the **facility** to modify. The Food Production Facility screen displays.
4. Modify any necessary **information.**
5. Select **Save** to receive a confirmation.
6. Select **<Edit** to return to the Food Production Facility screen or select **Finish** to return to the Food Production Facilities List screen.

4.15.4 Deleting a Food Production Facility List

1. On the menu, select **Application Packet**.
2. Select **Details** next to Food Production Facility List.
3. Select the **facility** to delete. The Food Production Facility screen displays.
4. Select **Delete** on the **Edit menu** in the top-right corner. The system transfers to the bottom of the screen and a warning message is displayed.
5. Select the **Delete** button at the bottom of the page. A confirmation message displays.

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

4.15.5 Entering Internal Use Only Information

1. On the menu, select **Application Packet**.
2. Select **Details** next to Food Production Facility List.
3. Select the **facility** to review. Food Production Facility screen displays.
4. Select **INTERNAL USE ONLY** on the Edit menu in the top-right corner. The system

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transfers to the bottom of the screen.

5. Enter **information** in the Internal Use Only section.
6. Select **Save Internal Use Only** to receive a confirmation.
7. Select **<Edit** to return to the Food Production Facility screen or select **Finish** to return to the Food Production Facility list screen.

4.16 Site Field Trip List

The Site Field Trip section of the Application Packet contains information about any field trips that an approved site will conduct for the specified year.

Please Note: Only approved sites can be associated with a Site Field Trip. Therefore, an initial review of an Application Packet will not include Site Field Trip forms because the State has not yet approved any sites.

4.16.1 Accessing the Site Field Trip List

1. On the blue menu toolbar, select **Applications** to access the menu screen.
2. On the menu, select **Application Packet**.
3. Select **Details** next to Site Field Trip List. The Field Trip – Site List screen displays.

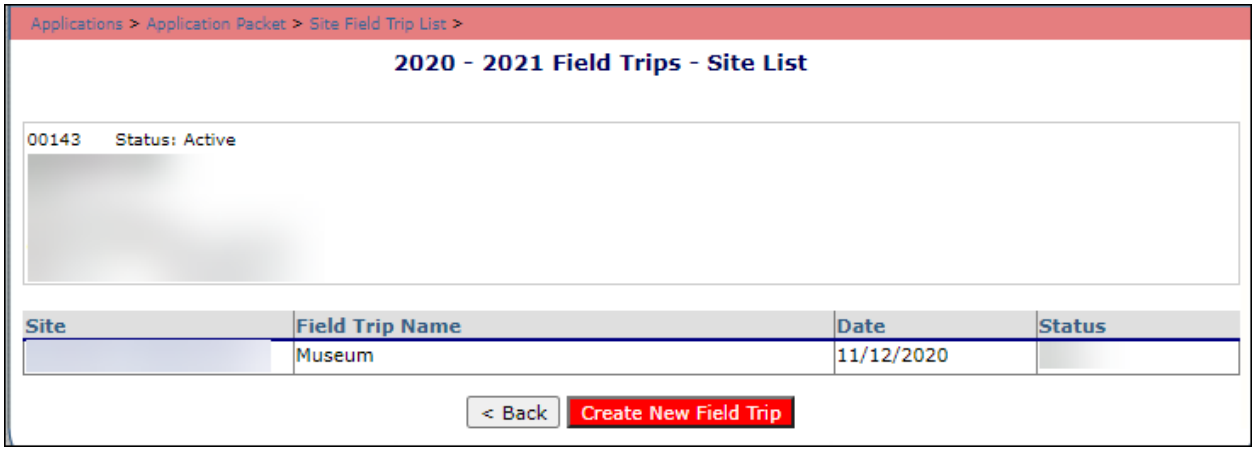

Figure 61: Site Field Trip List Screen

Tip: *A field trip can be added only for approved SFSP sites (i.e., an approved SFSP site application for the designated year)*

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4.16.2 Adding a Site Field Trip

1. On the menu, select **Application Packet**.
2. Select **Details** next to Site Field Trip List.
3. Select the **Create New Field Trip** button. A blank Site Field Trip screen for the specified year is displays.
4. Select the **Contracting Entity's Site** that will conduct the field trip.
5. Select the **Continue** button. The Site Field Trip screen is re-displayed with the selected site at the top of the page and field trip fields required for completion.
6. Complete the **form.**
7. Select **Save** to receive a confirmation.

4.16.3 Modifying a Site Field Trip

1. On the menu, select **Application Packet**.
2. Select **Details** next to Site Field Trip List.
3. Select the **field trip** to modify. The Site Field Trip screen displays.
4. Make any necessary **modifications.**
5. Select **Save** to receive a confirmation.
6. Select **<Edit** to return to the Site Field Trip screen or select **Finish** to return to the Field Trip – Site List screen.

4.16.4 Cancelling a Site Field Trip

1. On the menu, select **Application Packet**.
2. Select **Details** next to Site Field Trip List.
3. Select the **field trip** to cancel. The Site Field Trip screen displays.
4. Check the **box in question 6 "Cancel Request".**
5. Select **Save** to receive a confirmation.
6. Select **<Edit** to return to the Site Field Trip screen or select **Finish** to return to the Field Trip – Site List screen

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Figure 62: Site Field Trip Screen

4.16.5 Deleting a Site Field Trip

1. On the menu, select **Application Packet**.
2. Select **Details** next to Site Field Trip List.
3. Select the **field trip** to delete. The Site Field Trip screen displays.
4. Select **Delete** on the Edit menu in the top-right corner. A warning message is displayed.
5. Select the **Delete** button at the bottom of the page to receive a confirmation.

4.16.6 Entering Internal Use Only Information

1. From the menu, select **Application Packet**.
2. Select **Details** next to Site Field Trip List.
3. Select the **field trip** to review. The Site Field Trip screen displays.
4. Review the **information.**
5. Select **Internal Use Only** on the Edit menu in the top-right corner.
6. Enter **information** in the Internal Use Only section**.**
7. Select **Save Internal Use Only** to receive confirmation.
8. Select **<Edit** to return to the Site Field Trip screen or select **Finish** to return to the Field Trip – Site List screen.

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4.17 Checklist

A checklist is automatically generated based upon answers to specific questions from the Contracting Entity and site applications. The checklist identifies supplemental documents that need to be submitted to the state. The Checklist feature allows Contracting Entities 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.

4.17.1 Accessing a Checklist

1. From the menu, select **Application Packet.**
2. Select **Details** next to Checklist Summary.

4.17.2 Viewing a Checklist

1. From the menu, select **Application Packet**. The Application Packet screen displays.
2. Select **Details** next to Checklist Summary.
3. Select the **Contracting Entity** or **Site** to view a checklist. The applicable Checklist screen displays.

Please Note: Only Contracting Entities and Sites who have completed their applications and who have additional required documentation will have a checklist.

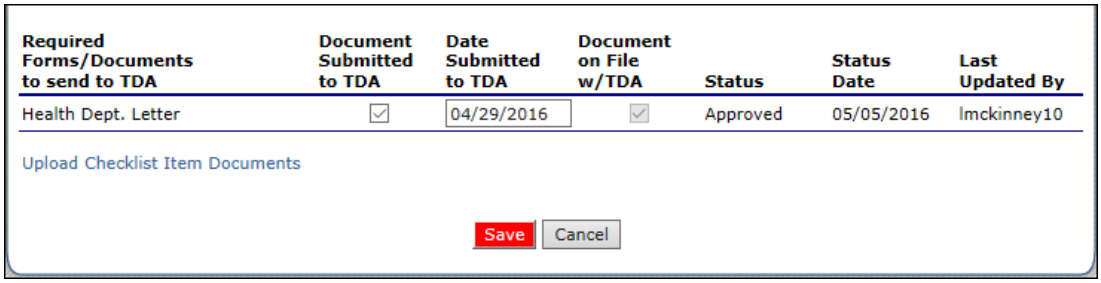

Figure 63: SFSP Checklist Screen

4.17.3 Updating a Checklist

1. From the menu, select **Application Packet**. The Application Packet screen displays.
2. Select **Checklist Summary**.
3. Select the **Contracting Entity** or **Site** whose checklist is to be updated.

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4. Identify whether the document has been submitted and the submission date. The **Date Submitted to the State** 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 the State.
5. Select **Save.** The Checklist Summary screen displays.

4.17.4 Uploading an Attachment to a Checklist Item

Please Note: If the checklist item has a paper clip icon next to it, the user can upload an attachment. Files in the following formats can be uploaded: .doc, .pdf, and .jpg. The system allows for files up to 15 MB.

1. From the Application Packet menu, select **Details** next to Checklist Summary. The Checklist File Upload Details screen displays.
2. Select the **Contracting Entity** or a **program site.**
3. Click the **Upload Checklist Item Documents link.** Proceed to upload all necessary **documents.**
4. Select **Save**.

4.17.5 Entering Internal Use Only Information

1. On the blue menu toolbar, select **Applications** to access the menu**.**
2. From the menu, select **Application Packet**.
3. Select **Details** beside Checklist Summary. The Checklist Summary screen displays.
4. Select the **Contracting Entity** or **Site** to view the checklist.
5. Select **Internal Use Only** on the Edit menu in the top-right corner.
6. Identify if the document was received by checking the "Document on File w/the State" checkbox. If the checklist item has also been reviewed, select the **Status and Status Date**.
7. Select **Save Internal Use Only.** A confirmation screen displays.
8. Select **<Edit** to return to the Checklist screen or select **Finish** to return to the Checklist Summary screen.

4.18 Application Packet Notes

The Application Packet Notes screen allows State users to read and add notes regarding an entire Application Packet. This enables state users to efficiently communicate and log information pertaining

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to an Application Packet. Comments regarding a specific Application Packet item can be entered in the Internal Comments field in the Internal Use Only section of the respective screen.

4.18.1 Accessing Application Notes

1. On the blue menu toolbar, select **Applications** to access the menu screen.
2. On the menu, select **Application Packet**.
3. Select **Details** next to Application Packet Notes. The Application Packet Notes screen displays.

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

4.18.2 Viewing an Application Note

1. On the blue menu toolbar, select **Applications** to access the menu screen**.**
2. On the menu, select **Application Packet**.
3. Select **Details** next to Application Packet Notes. The Application Packet Notes screen displays.

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

4.18.3 Creating a New Application Note

1. On the blue menu toolbar, select **Applications** to access the menu.
2. On the menu, select **Application Packet**.
3. Select **Details** next to Application Packet Notes.
4. Select the **Create a New Application Note** button.
5. Enter the **Subject**.
6. Enter the **Note**.
7. Identify if the Contracting Entity will be able to see the note by checking the **"If checked, Note is visible to Contracting Entity" checkbox.**
8. Select **Save** to receive a confirmation.
9. Select **<Edit** to return to the Application Note screen or select **Finish** to return to the Application Notes screen.

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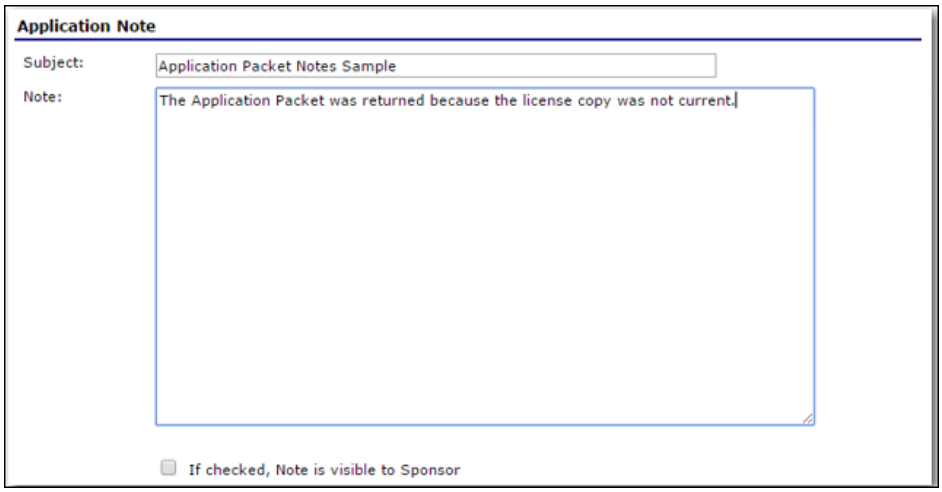

Figure 64: Application Note Screen

4.18.4 Deleting an Application Note

1. On the blue menu toolbar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** beside **Application Packet Notes**. The Application Packet Notes screen displays.
4. Under **Date**, select the date of the note to delete. The Application Note screen displays.
5. Select **Delete** on the Edit menu in the top-right corner.
6. The system transfers the user to the bottom of the screen and a warning message is displayed.
7. Select the **Delete** button at the bottom of the page. A confirmation message displays.
8. Select **Finish** to return to the Application Notes screen.

4.19 Application Packet Notes for CE

The Application Packet Notes for CE provides the Contracting Entity the ability to view overall Application Packet notes created by the State. Comments regarding a specific Application Packet item are viewable at the top of the screen for each packet item (e.g., State comments specific to the CE application screen).

4.19.1 Viewing an Application Note

1. On the blue menu toolbar, select **Applications.**
2. From the menu, select **Application Packet.**
3. Select **View** next to the Application Packet Notes for CE.

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Please Note: The number next to the Application Packet Notes for CE title represents the number of notes available to view.

4.20 NDL Application Packet Dashboard

The NDL Dashboard is a component of the Application Packet.

Please Note: Access to the NDL Dashboard is provided only to authorized State users for review. If any suspects have not been verified, "Requires Review" will be displayed. The Application Packet cannot be Approved if there are unverified NDL suspects.

4.20.1 Accessing the NDL Dashboard

1. Select **Applications** from the blue menu toolbar. The Applications menu screen displays.
2. Select **Application Packet** from the menu screen.
3. Click **Details** next to NDL Application Packet Dashboard.

4.20.2 Analyzing NDL Data

The information on the NDL Dashboard screen is derived from the saved form data of the Sponsor Applications, Site Applications, Provider Applications, Board of Directors, and SFSP Management Plan. The system consolidates the same contacts based on their first and last name.

The following four images are used to visually identify the NDL status:

System verified. No match based on the given criteria/data in the NDL data.

User verified that the suspect is not the one found in the NDL data.

The system found a match based on the given criteria/data in the NDL data, but it hasn't yet been verified.

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The suspect has been determined to be on the NDL.

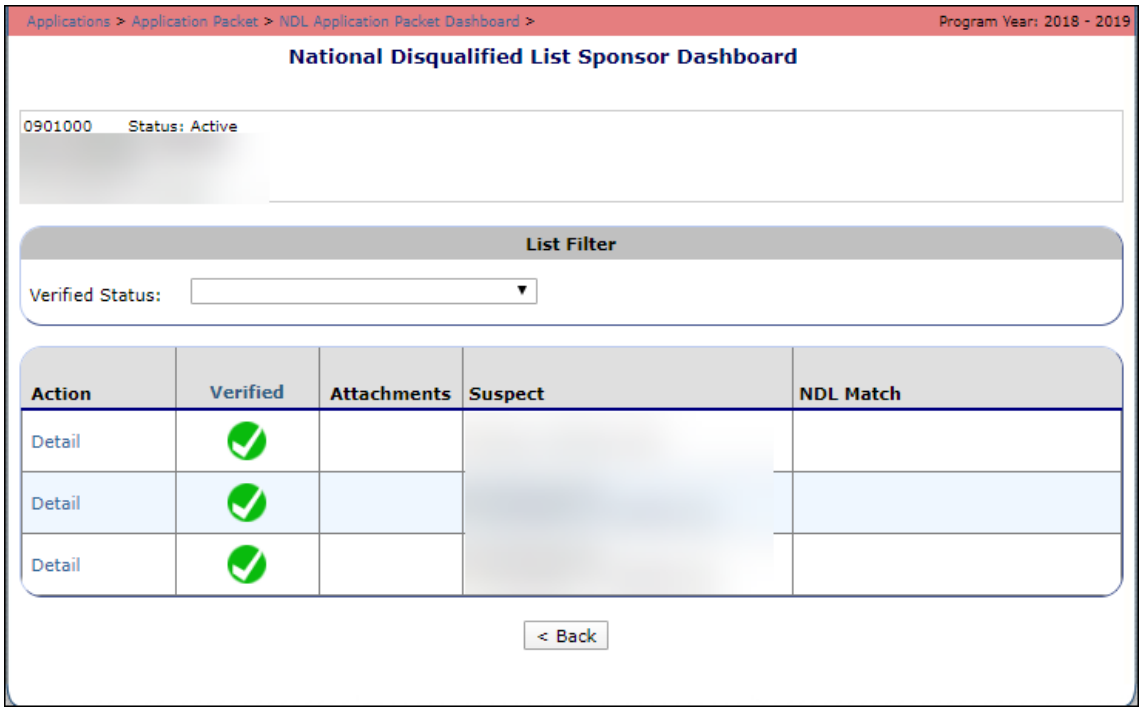

Figure 65: NDL Dashboard

Please Note: The list has a filter to control what displays. The default contains all categories: non-suspects, only pending suspects, verified offender, and verified okay.

For lists containing more than thirty (30) rows, the grid will add paging. This enables the user to flip through the data in smaller chunks.

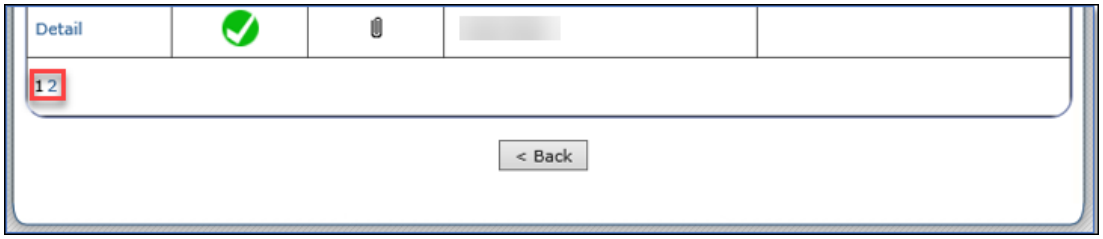

Figure 66: Additional Pagination Example

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The “paper clip” icon displays if the suspect has any attachments.

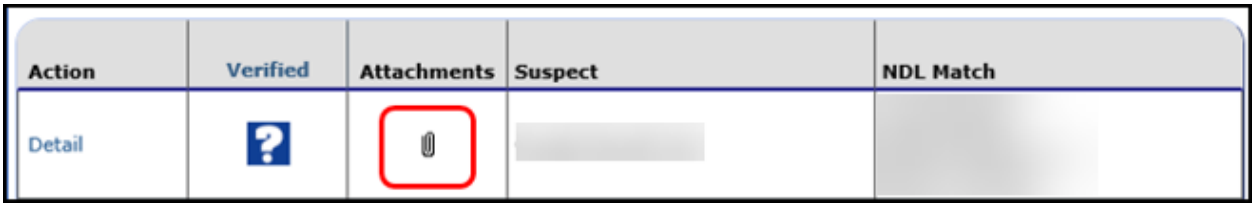

Figure 67: Attachments Example

4.20.3 NDL Suspect Detail

Selecting the **Detail** link of the NDL Dashboard for a suspected match, displays the following screen.

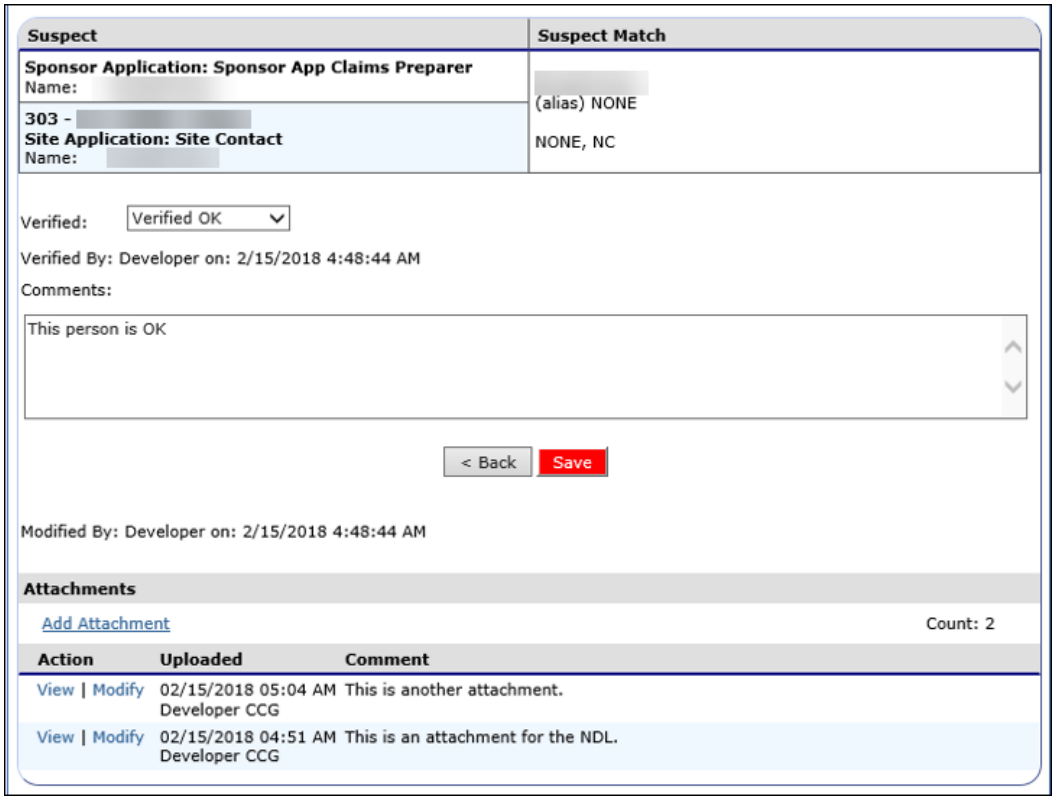

Figure 68: Suspect Match Detail Screen

All suspect occurrences are listed along with the matching NDL data. The user sets the NDL status based on their findings by selecting one of the options in the “Verified” drop-down box.

The drop-down box selections include:

- Not Verified
- Verified OK

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- Verified NOT OK

The user can enter comments, as well as add attachments as needed. Attachments would function as they do in other parts of the system.

4.20.4 Adding an Attachment

1. From the NDL Suspect Match Detail screen, click on the **Add Attachment** link. A pop-up Attachment screen displays.
2. Select **Browse** to access the applicable file(s).
3. Add a **Comment** in the textbox.
4. Select **Save.**

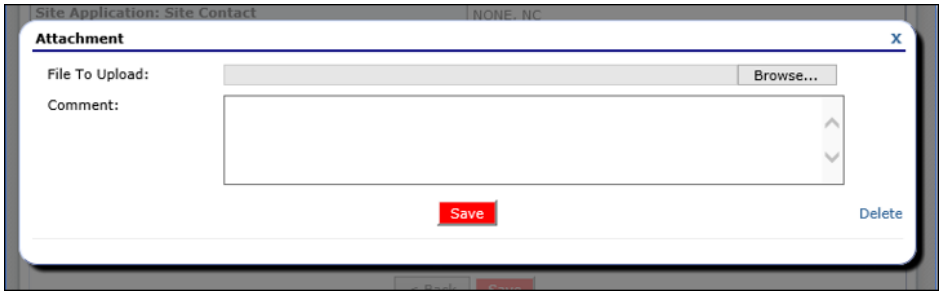

Figure 69: Attachment Pop-Up Screen

4.20.5 Modifying an Attachment

1. To modify an existing attachment, select **Modify** in the Actions column next to the applicable attachment. A pop-up screen displays.

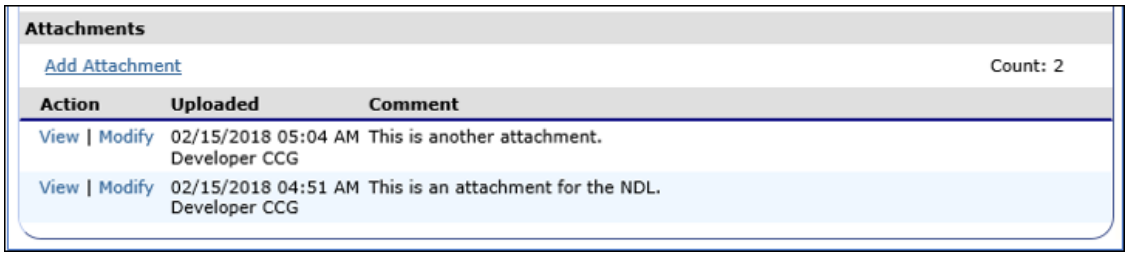

Figure 70: Attachment List

2. Make any revisions. Select **Save.**

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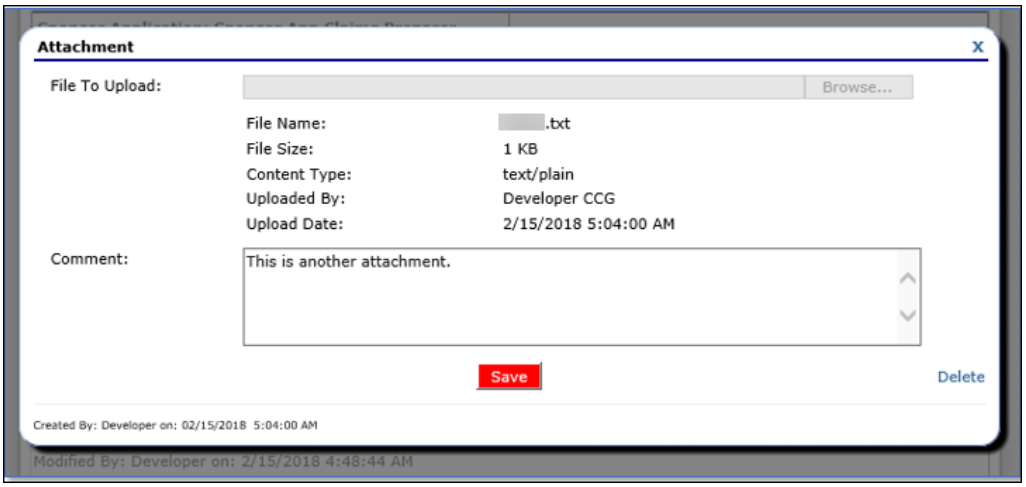

Figure 71: Attachment Pop-Up Screen

Please Note: A file cannot be uploaded more than once.

4.20.6 NDL Non-Suspect Detail

Selecting the Detail link of the NDL Dashboard for Non-Suspect match displays the following screen.

Figure 72: NDL Non-Suspect Match Detail Screen

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4.21 Advance Requests

Contracting Entities use the Advance Requests menu option to submit a request for operational or administrative payment advances and to view the status of their submitted requests. This screen is Contracting Entities-specific.

4.21.1 Accessing Advance Requests

1. On the blue menu toolbar, select **Applications** to access the menu screen.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.

Action	Advance Month	Advance Type	Advance Amount	Outstanding Balance	Status	Date Processed
	Oct 2011				n/a	
	Nov 2011				n/a	
	Dec 2011				n/a	
	Jan 2012				n/a	
	Feb 2012				n/a	
	Mar 2012				n/a	
	Apr 2012				n/a	
	May 2012				n/a	
View	Jun 2012	Operating	$ 31,835.87	$ 0.00	Processed	05/08/2012
	Jun 2012	Administrative	$ 1,164.13	$ 0.00	Processed	05/08/2012
View	Jul 2012	Operating	$ 16,000.00	$ 0.00	Processed	06/07/2012
	Jul 2012	Administrative	$ 1,000.00	$ 0.00	Processed	06/07/2012
View	Aug 2012	Operating	$ 14,000.00	$ 0.00	Processed	07/10/2012
	Aug 2012	Administrative	$ 0.00	$ 0.00	Approved	
	Sep 2012				n/a	
		Totals	$ 64,000.00	$ 0.00		

Figure 73: Advance Request List Screen

4.21.2 Adding an Advance Request

1. On the blue menu bar, select **Applications** to access the menu screen.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select **Add** next to the applicable advance month. The Advance Request screen displays.
4. Select the **type of requested advance.**
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the previous page or select **Finish** to return to the Advance Requests list screen.

Please Note: At least one site must have at least eight (8) operating dates in the advance month to request an advance.

A Contracting Entity may request up to three (3) Operating Advances and up to two (2) Administrative advances for a designated program year.

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4.21.3 Viewing or Modifying an Advance Request

1. On the blue menu toolbar, select **Applications** to access the menu screen.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select an **advance** to view or modify. The Advance Request screen displays.
4. Update any necessary **information.**
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** or select **Finish** to return to the Advance Requests list screen.

4.21.4 Deleting an Advance Request

1. On the blue menu toolbar, select **Applications** to access the menu screen.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select **Modify** next to the **advance** to be deleted. The Advance Request screen displays.
4. Select **Delete** on the Edit menu in the top-right corner.
5. The system transfers the user 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 Advance Requests that have not been submitted can be deleted. Selecting the Delete button permanently deletes the Advance Request from the system. It will not be recoverable once deleted.

4.22 Advance Requests Manager

The State uses the Advance Request Manager to review and approved advance requests submitted by Contracting Entities. This menu option is available ONLY to authorized State users.

Please Note: This screen can be configured to also be accessible from the Accounting menu.

4.22.1 Accessing an Advance Request

1. On the blue menu toolbar, select **Applications** to access the menu screen.
2. On the menu, select **Advance Requests Manager**. The Advance Requests Manager screen displays.

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4.22.2 Searching for an Advance Request

1. On the blue menu toolbar, select **Applications** to access the menu screen.
2. On the menu, select **Advance Requests Manager**. The Advance Requests Manager screen displays.
3. Enter the **search criteria** and select the **Search button.** The screen will display all advances that meet the entered criteria.
4. Select an **advance** to view or modify or select the **<Back** button to return to the Applications menu.

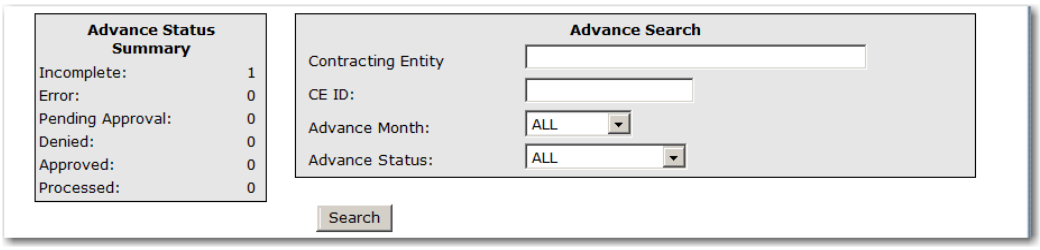

Figure 74: Advance Requests Manager - Search Feature (partial screen)

4.22.3 Reviewing an Advance Request

1. On the blue menu toolbar, select **Applications** to access the menu screen.
2. On the menu, select **Advance Requests Manager**. The Advance Requests Manager screen displays.
3. Enter the **search criteria** and select the **Search** button. The screen will display all advances that meet the entered criteria.
4. Select an **advance** to view or modify.
5. Review the **information.**
6. Identify whether the **Contracting Entity** is approved to receive an advance in excess of $40,000.
7. Enter the **advance amount** approved by the State.
8. Enter **information** in the Internal Use Only section.
9. Select the **Save** button. A confirmation screen displays.

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4.23 Annual Audit

The Annual Audit screen provides access to the Sponsor's Annual Audit form based on the year that is selected. The State requires that Sponsors fill out an annual audit status form one time per year.

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

4.23.1 Viewing and Modifying an Annual Audit Status Form

1. Select **Annual Audit** to access the menu screen.
2. Select **Modify** next to the corresponding School Year.
3. The Annual Audit form displays. Complete the required **information.**
4. Select **Save.** A Confirmation screen displays.
5. Select **<Edit** to return to the previous screen or click **Finish** to complete the action.

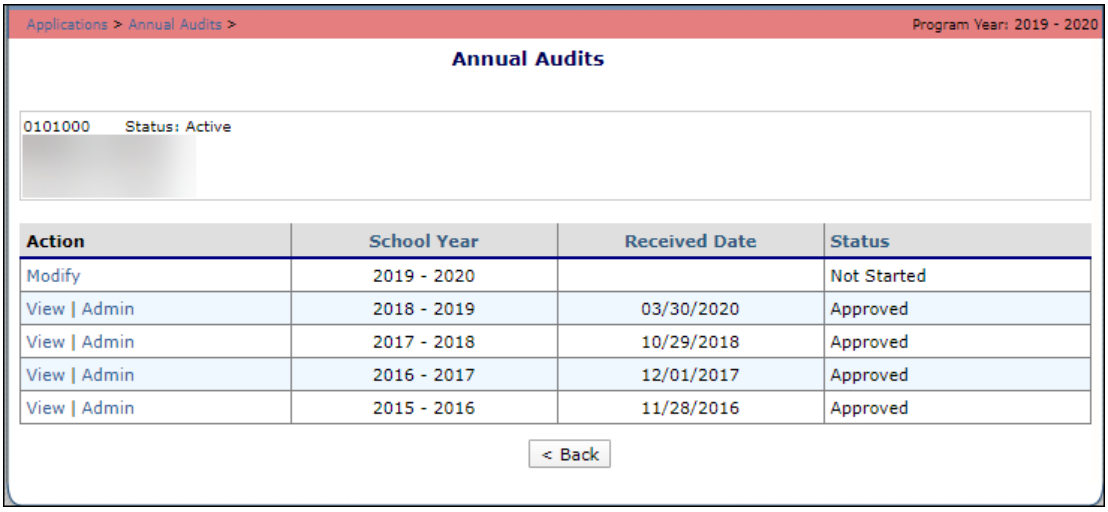

Figure 75: Annual Audits Screen

4.23.2 Enter Internal Use Only Information

1. From the Applications menu, select **Annual Audit.**
2. Select **Internal Use Only** in the top-right corner.
3. If prompted, select **OK** in the dialogue box that appears to continue without saving any changes.
4. Select **Save Internal Use Only** to receive a confirmation.

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4.23.3 Deleting an Annual Audit Form

1. From the Application menu, select **Annual Audit** to access the form.
2. On the Edit menu, select **Delete.** A warning displays.
3. Select **Delete** to receive a confirmation.
4. Select **Finish** to return to the Applications menu.

4.24 Annual Audits Status Summary

The Annual Audit Summary Search screen provides a search filter for the Annual Audit Status List screen in order to simplify the annual audit process for State users. Results can be filtered by year, Sponsor ID/name, status, exempt status, received date, and vendor number.

The search results from the query criteria entered on the Annual Audit Status Summary screen allow the user to view the audit information, as well as allows the user to export data to an Excel spreadsheet for the Audit and Investigation interface. These spreadsheets can later be uploaded in the Annual Audit Upload feature.

4.24.1 Viewing an Annual Audit Status Summary

1. On the Applications menu select **Annual Audit Status Summary.**
2. Enter all relevant **search criteria.**
3. Select **Search.** The Annual Audit Summary Search results screen displays.
4. Select **Export to Excel** at the bottom of the screen. A “File Save” box appears.
5. Select **Save** to save the spreadsheet to the computer.
6. Select the **location** to save the file.
7. Select **Save**. The summary data displays in Excel.

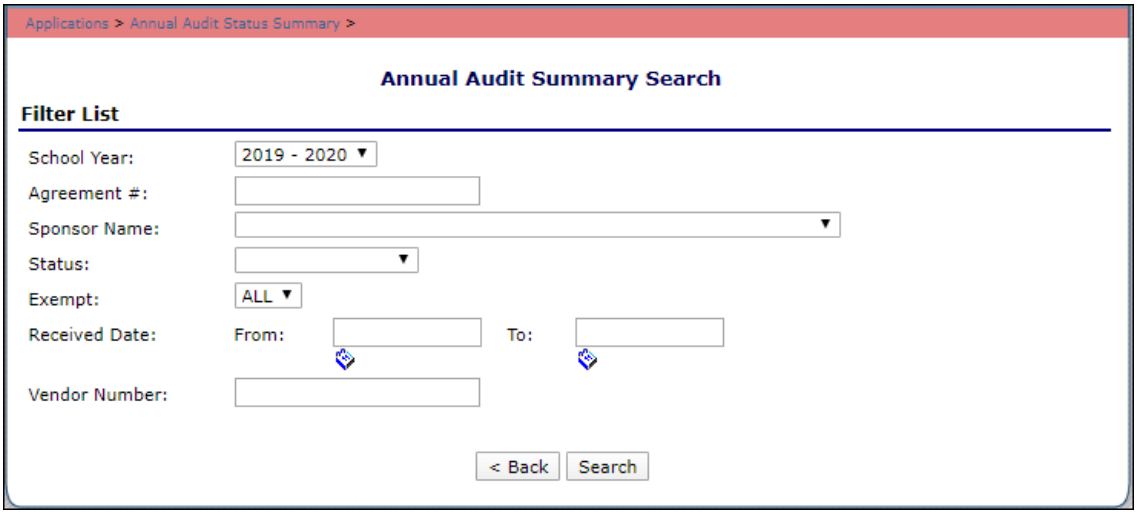

Figure 76: Annual Audit Summary Search Screen

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4.25 Download Forms

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

4.25.1 Accessing Download Forms

1. On the blue menu toolbar, select **Applications** to access the menu screen.
2. On the menu, select **Download Forms**. The Download Forms screen displays.

4.25.2 Downloading or Viewing a Form

1. On the blue menu toolbar, select **Applications** to access the menu screen.
2. On the menu, select **Download Forms**. The Download Forms screen displays a list of all available forms.
3. Select the **Form ID** of a form to download. If the form is a document, a gray dialog box appears.
4. Select **Open** to view the form or select **Save** to save the form to the computer.

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

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

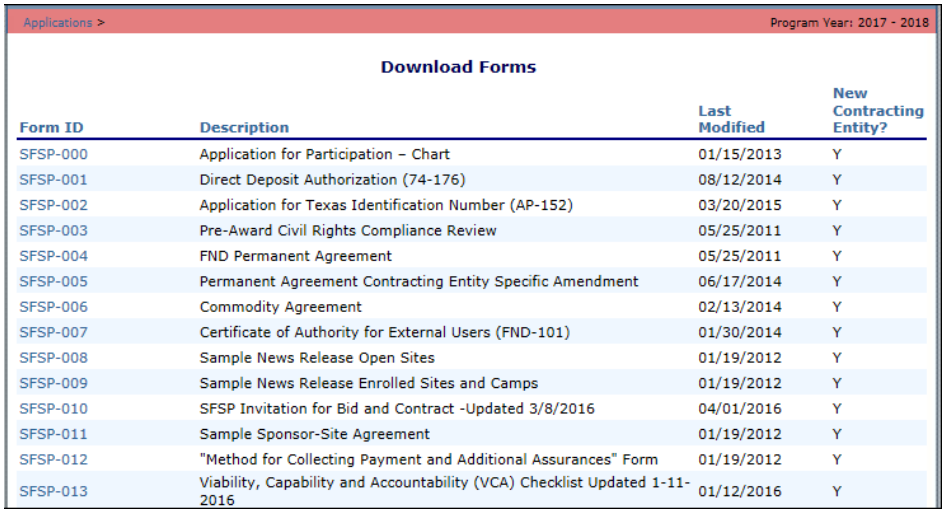

Figure 77: Download Forms Screen (Partial Screen)

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Please Note: The user can choose to view the forms by Group (default) or by Form ID. This option is important when more than one Group has been defined by the State for a specific program.

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5.0 Claims

The TX-UNPS Claims component allows Contracting Entities to submit monthly online reimbursement claim requests to the State, review claim rates, and review historical payment summaries.

5.1 Claims Process

A Contracting Entity submits a reimbursement claim to the State for every month in which one or more sites participate in the Summer Food Service Program. Contracting Entities may enter information into the monthly claim form beginning at the first of every month. Contracting Entities have sixty days from the last day of the claim month/year to submit an original claim.

Please 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 Administrator to validate the effective date of the CE 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
Contracting Entity	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.

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5.2 Claims Menu

Contracting Entities use the Claims menu to access SFSP claim functions, view current claim rates, or view payment summaries.

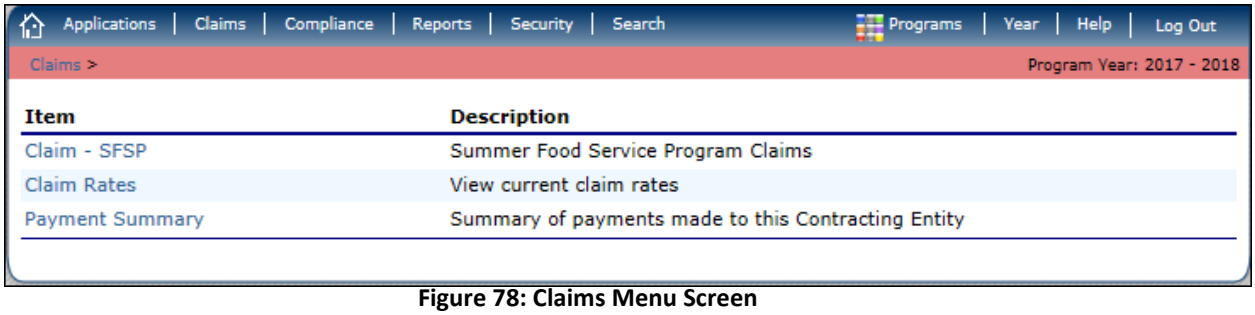

Figure 78: Claims Menu Screen

5.3 Claims Dates

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

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

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5.4 Claims

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

5.4.1 Accessing a Claim Entry

1. On the blue menu toolbar, select **Claims** the menu screen displays.
2. If necessary, select a **Contracting Entity.**
3. From the Claims menu, select the **Claim - SFSP**. The Claim Year Summary screen displays.
4. Select a **Claim Month** to submit a claim. The Claim Month Details screen displays.

5.5 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. 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.

Please Note: Only months that are identified as valid operational months on the Contracting Entity Application are enabled to submit claims.

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Claim Month	Adj Number	Claim Status	Date Received	Date Processed	Earned Amount
Oct 2015					$0.00
Nov 2015					$0.00
Dec 2015					$0.00
Jan 2016					$0.00
Feb 2016					$0.00
Mar 2016					$0.00
Apr 2016					$0.00
May 2016					$0.00
Jun 2016	0	Processed	07/06/2016	07/07/2016	$218,493.27
Jul 2016	0	Processed	08/03/2016	08/04/2016	$31,597.05
Aug 2016	0	Processed	08/24/2016	09/06/2016	$13,020.01
Sep 2016					$0.00
				Year to Date Totals	**$263,110.33**

< Back

Figure 79: Claims Year Summary Screen

5.6 Claim Month Details

From the Claim Month Details screen, access is available to 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).

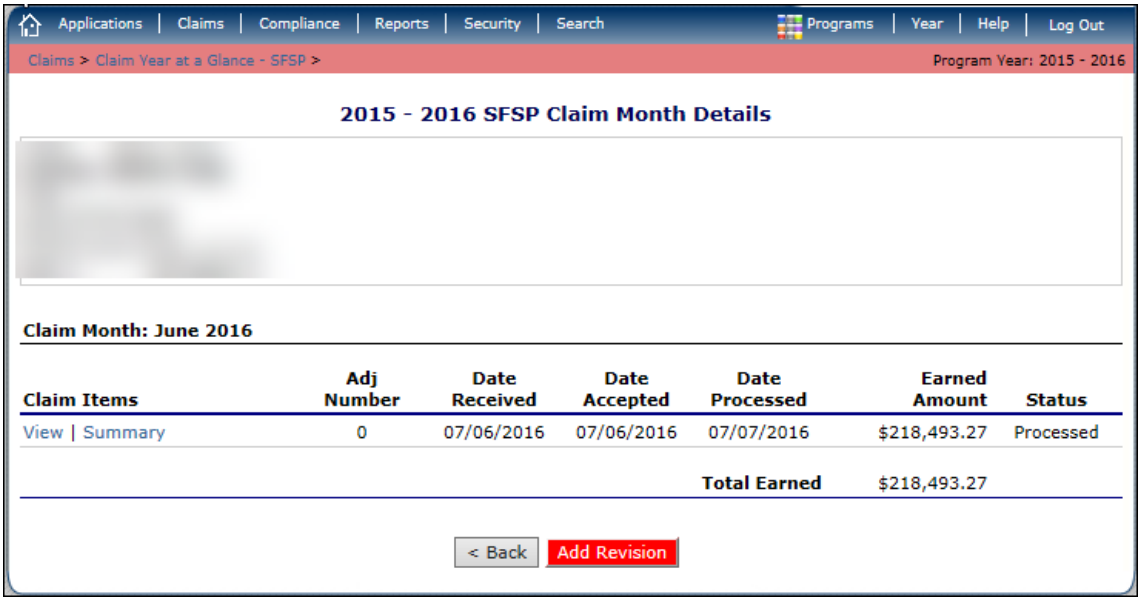

Figure 80: Claim Month Details

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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).

Please 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 payment batch, the status of the claim is “Accepted*” until the batch process has been completed When the batch process has completed, the status of the claim is “Processed”.

5.7 Claim Site List

All SFSP Contracting Entities perform site-level claiming. The Contracting Entity will first select Add Original Claim from the Claim Months Detail screen. The Claim Site List screen will display.

Figure 81: Claim Site List Screen

The Contracting Entity would use the Claim Site List screen to select the site whose claim to add, view, or modify.

Please Note: Only active sites with an approved application packet for the Program Year will have the ability to enter a claim via the Claim for Reimbursement screen.

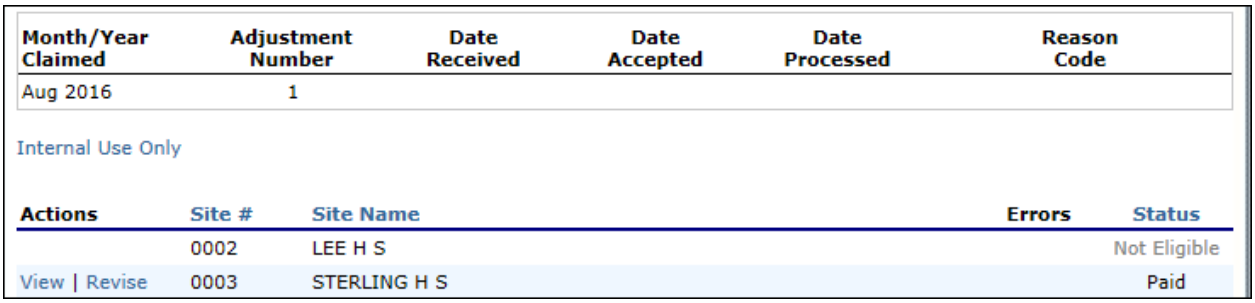

Figure 82: Claim Site List Summary Screen

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5.7.1 Adding an Original Claim

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the applicable **Claim Month**. The Claim Month Details screen displays.
3. Select **Add Original Claim** Select **Add Original Claim** button. For site-level claiming, the Claim Site List screen displays.

Figure 83: Claim Month Details screen – Add Original Claim

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

4. Under Actions, select **Add** to the left of the **Site Name** to add an original claim. **The Claim for Reimbursement screen** displays
5. For each site claim, enter **claim information** for all enrolled programs.
6. Select **Save**. If there are no errors, the data is saved and the user is returned to Claim Site List screen.
7. Repeat **Steps 3-6** for each applicable site.
8. Once all site claims are completed, select the **Continue** button on the Claim Site List screen. The Claim Month Details screen is displayed. Review the data for accuracy.
9. To make a modification or correction to the claim, select the **<Back** button to return to the Claim for Reimbursement screen
10. To submit the claim, check the **Certification box** and select the **Submit for Payment** button.

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WARNING: An original claim cannot be submitted by a Contracting Entity if the received date is more than 60 days since the last day of the claim month/year.

WARNING: If the Contracting Entity has <10 days in their final month of operation, the Contracting Entity may submit a combined claim representing the current month + previous month.

If the Contracting Entity happens to be operating only 1 month that is LESS than 10 days, the State must instruct the Contracting Entity to increase the number of operating days to 10 or greater. Since the claim is calculated based on the number of meals and not the number of days, this will not cause a calculation problem and will allow the Contracting Entity to submit a claim into the system.

5.7.2 Modifying an Un-Processed Claim

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

1. From the **Claims menu**, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select a **Claim Month**. The Claim Month Details screen displays.
3. Select **Modify**. The Claim Site List screen displays.
4. Under Actions, select **Modify** to the left of the **Site. The Site Claim Report screen** displays.

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

5. Update **claim information.**
6. Select **Save**. If there are no errors, the data is saved and the user is returned to Claim Site List screen.
7. Repeat **Steps 4-6** to modify each applicable **site claim.**
8. Once all site claims are completed, select the **Continue** button on the Claim Site List screen. The SFSP Claim for Reimbursement-Contracting Entity Information screen is displayed. Review the data for accuracy.
9. Click **Continue**.
10. To submit the modified claim, check the **Certification box** and select the **Submit for Payment button.**

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Please Note: When the Submit for Payment button is selected, the system performs additional checks. 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 Contracting Entity if the received date is more than 60 days from the last day of claim month/year.

5.7.3 Revising a Processed Claim

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select a **Claim Month.** The Claim Month Details screen displays.
3. Select **Add Revision** button.
4. If the Contracting Entity is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Revise** to the left of the **Site Name** to revise the claim. The **Claim for Reimbursement screen** displays
5. Make any necessary changes to the **claim.**
6. Select **Save**. If there are no errors, the data is saved, and the user is returned to Claim Site List screen.
7. Repeat **Steps 3-5** for each applicable site.
8. Once all site claims are completed, select the **Continue** button on the Claim Site List **screen.** The SFSP Claim for Reimbursement—Contracting Entity Information screen is displayed. Review the data for accuracy. Click **Continue**.
9. To submit the revised claim, check the **Certification box** and select the **Submit for Payment** button. Claims must be re-processed by the State regardless of their original status.

WARNING: An upward adjusted claim cannot be submitted by a Contracting Entity if the received date is more than 60 days since the last day of claim month/year.

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5.7.4 Viewing a Claim

1. From the Claims menu, select the **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select a **Claim Month**. The Claim Month Details screen displays.
3. If the Contracting Entity is performing Contracting Entity-level claiming, select **View.** The Claim for Reimbursement screen displays.
4. If the Contracting Entity is performing site-level claiming, the Claim Site List screen displays. **Under Actions**, select **View** to the left of the applicable **Site Name**. The Claim for Reimbursement screen displays.

5.7.5 Viewing a Claim Summary

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select a **Claim Month**. The Claim Month Details screen displays.
3. Select **Summary** under Claim Items. The Claim for Reimbursement Summary screen displays.

5.7.6 Deleting a Claim

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select a **Claim Month**. The Claim Month Details screen displays.
3. Select **Modify**.
4. Select **Modify** to the left of the Site Name. The Claim for Reimbursement screen displays
5. Select **Delete** in the Edit menu in the upper-right corner.
6. The system transfers the user to the bottom of the screen and a warning message is displayed.
7. Select the **Delete** button at the bottom of the page. A confirmation message displays.
8. Select **Finish**.

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

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5.7.7 Entering Internal Use Only Information for a Site -Level Claim

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays. Select the desired **Claim Month**. The Claim Month Details screen displays.
2. Select **Modify** in the Claim Items column**.** The Claim Site List screen displays. Under Actions, select **Modify** to the left of the Site Name. The Claim for Reimbursement screen **displays.**
3. Select **Internal Use Only** from the top right of the screen.
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 Claim for Reimbursement screen or select **Finish** to return to the Claim Month Details screen.

5.8 Claim Rates

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

5.8.1 Accessing Claim Rates

1. From the Claims menu, select **Claim Rates**. The Claim Rates screen displays.
2. Use the **<Back** button to return to the Claims menu.

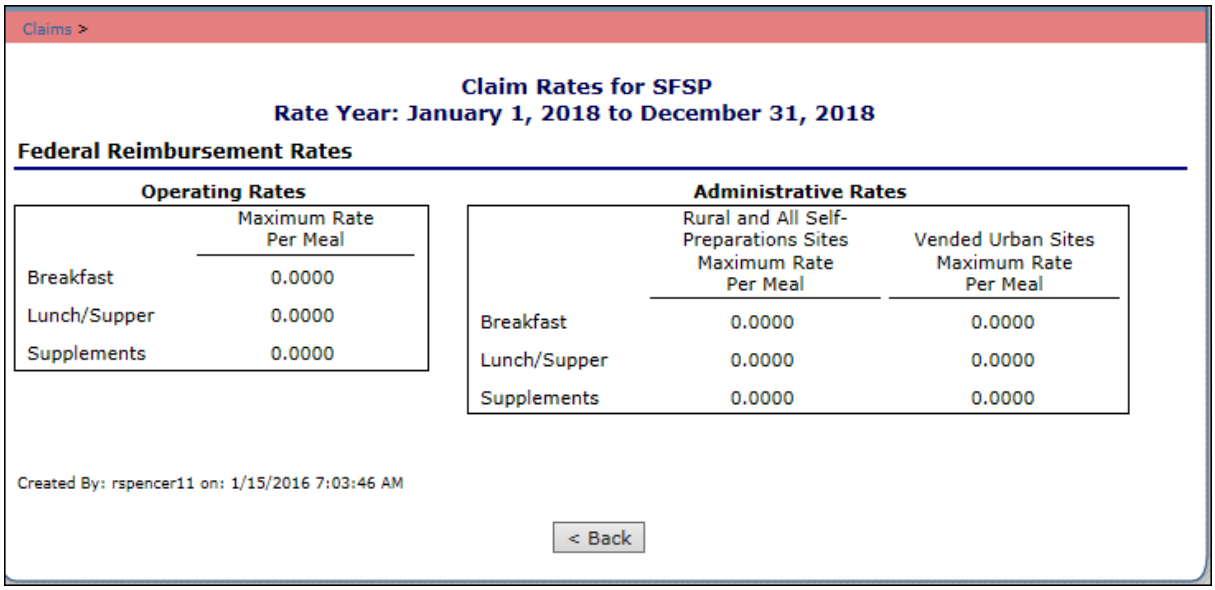

Figure 84: Claim Rates for SFSP Screen

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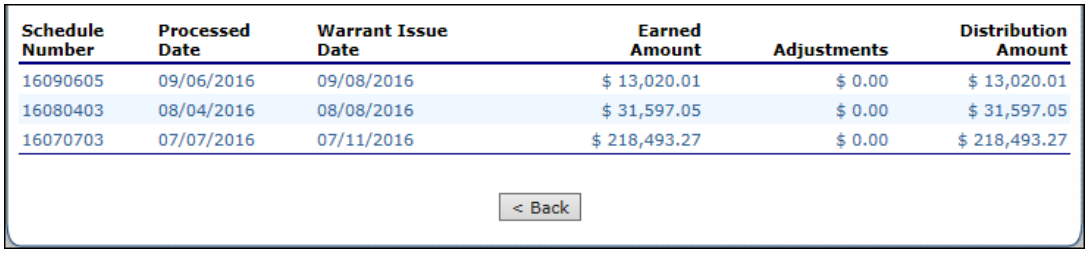
5.9 Payment Summary

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

5.9.1 Accessing a Payment Summary

1. From the Claims menu, select **Payment Summary**.
2. Use the **<Back** button to return to the Claims menu.



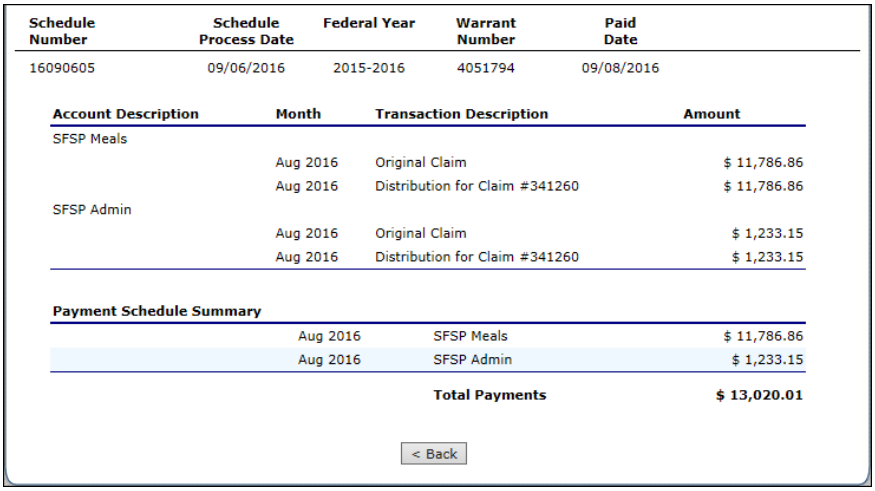
Schedule Number	Processed Date	Warrant Issue Date	Earned Amount	Adjustments	Distribution Amount
16090605	09/06/2016	09/08/2016	$ 13,020.01	$ 0.00	$ 13,020.01
16080403	08/04/2016	08/08/2016	$ 31,597.05	$ 0.00	$ 31,597.05
16070703	07/07/2016	07/11/2016	$ 218,493.27	$ 0.00	$ 218,493.27

< Back

Figure 85: Payment Summary List Screen

5.9.2 Viewing a Payment Summary

1. From the Claims menu, select **Payment Summary**.
2. Select a **payment record** 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	Warrant Number	Paid Date
16090605	09/06/2016	2015-2016	4051794	09/08/2016

Account Description	Month	Transaction Description	Amount
SFSP Meals			
	Aug 2016	Original Claim	$ 11,786.86
	Aug 2016	Distribution for Claim #341260	$ 11,786.86
SFSP Admin			
	Aug 2016	Original Claim	$ 1,233.15
	Aug 2016	Distribution for Claim #341260	$ 1,233.15

Payment Schedule Summary

Aug 2016	SFSP Meals	$ 11,786.86
Aug 2016	SFSP Admin	$ 1,233.15
	Total Payments	**$ 13,020.01**

< Back

Figure 86: Payment Summary Screen

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6.0 Compliance

The Compliance Administration sub-module provides information regarding how to navigate to and use the features associated with administering and managing Reviews, as well as Corrective Action Documents (CADs).

Authorized users will have the ability to:

- Schedule and track reviews.
- Enter and maintain CE contact information related to the review.
- Identify sites to be included in the review.
- Identify State users participating on team reviews.
- Complete the review forms.
- Manage the requirement for and submission of CADs.
- Enter technical assistance information.
- Enter notes for CE to view.
- Enter internal notes that are viewable only by State users.
- Manage attachments within the system.
- Track correspondences sent to and received by the CE related to the review.

6.1 Compliance Menu

Using the SFSP module, authorized users have the ability to access the Compliance administration submodule. From the SFSP Reviews screen, the user can either add a new Review or open an existing Review to view or modify.

Once a new review has been set up in the system, the user is transferred to the Review Dashboard for a summary of the review and a launching point to all available review-specific functions.

6.1.1 Accessing the Compliance Menu

1. On the blue menu toolbar, select **Compliance.**

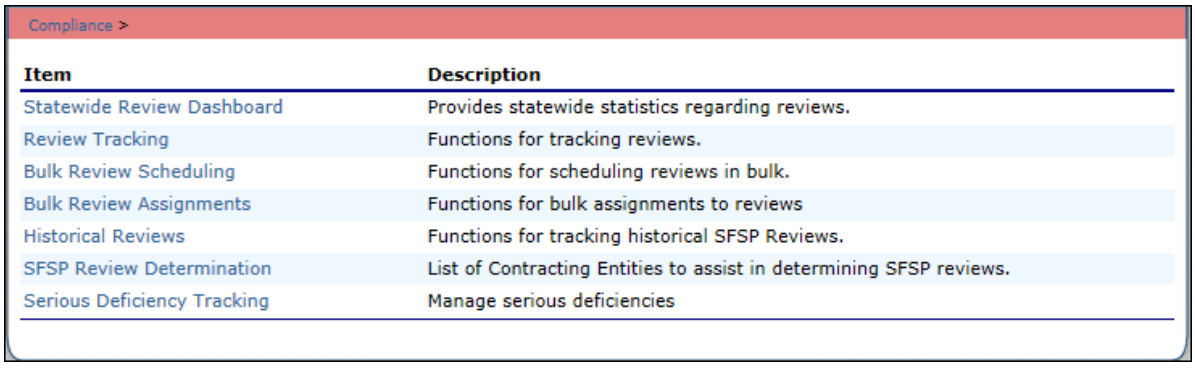

Figure 87: Compliance Menu Screen

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6.2 Statewide Review Dashboard

The Review Dashboard serves as the launching point for all information pertaining to the review including:

- Managing the administration of the review.
- Updating review contact information.
- Identifying sites to review.
- Completing forms.
- Managing findings and Corrective Action Documents (CADs).
- Entering Technical Assistance, Notes, and recommendations.

There are four (4) major process steps in completing a SFSP review:

1. Scheduling a review.
2. Preparing for and conducting the On-site review.
3. Completing the Findings/Corrective Action process.
4. Closing the review.

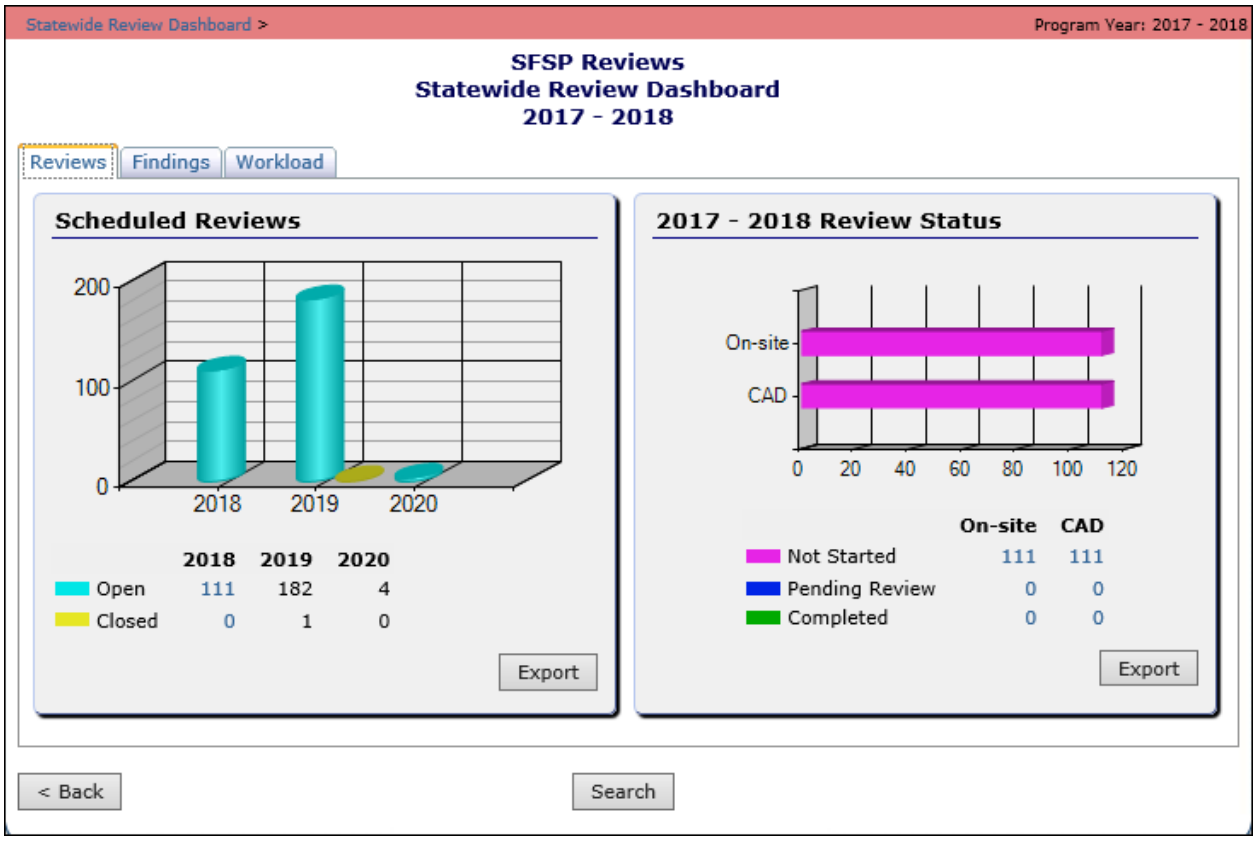

Figure 88: Statewide Review Dashboard

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6.2.1 Accessing the Review Dashboard

1. If necessary, search for and select a **CE.**
2. On the blue menu toolbar, select **Compliance.**
3. Select **Review Tracking** from the Compliance menu to access the list screen.
4. Select **Details link** for the applicable review.

Please Note: Menu items and links on the Review Dashboard are driven by the Security feature.

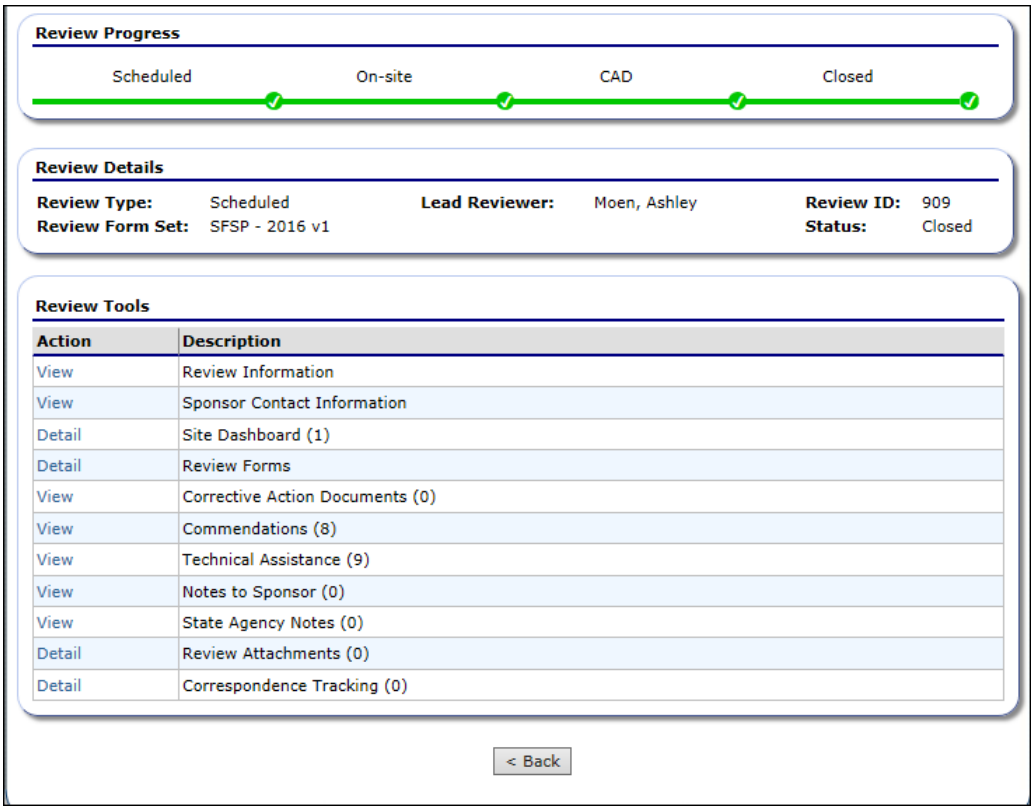

Figure 89: Review Dashboard Screen (Partial Screen)

Tip: *When applicable, a number in parenthesis is displayed after a menu item. This indicates the respective count of the associated items (e.g., a "(1)" next to Site Dashboard indicates that one (1) site has been selected for review).*

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6.2.2 Accessing Graphical Review Data

1. Log on to the system.
2. On the Programs screen, select **Summer Food Service Program.**
3. On the blue menu toolbar, select **Compliance.**
4. Select the **Statewide Review Dashboard link.**
5. Select the **tab related to the category of review data** to access.

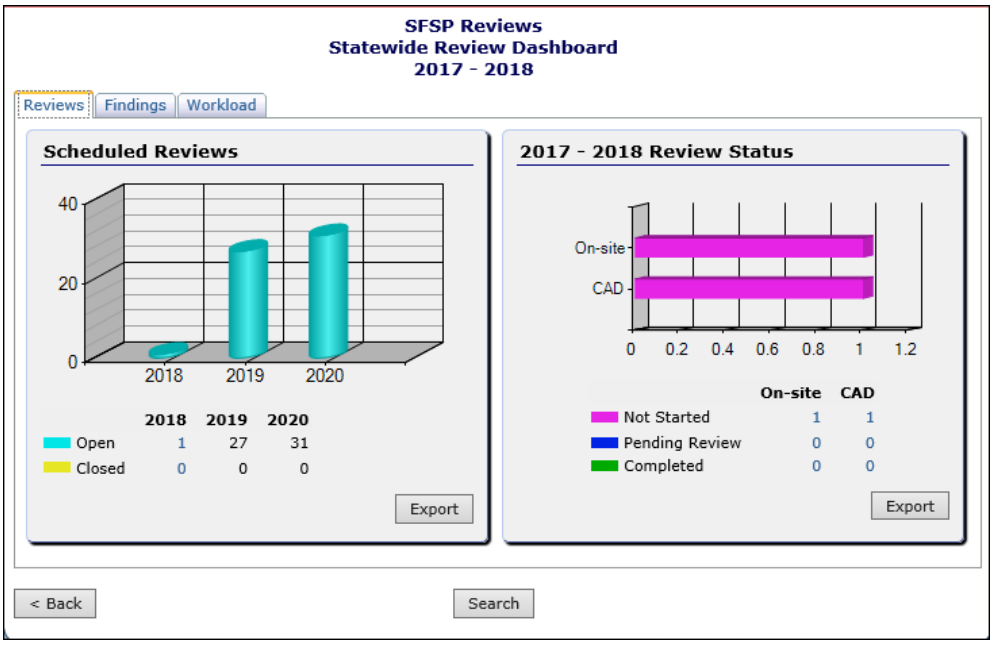

Figure 90: Graphical Review Data Screen

6. To view the data for a specific statistic, select the **count link.** The Review Search displays with the data results.
7. To export the data into Microsoft Excel for a specific graphic, select **Export.**

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8. To conduct a search not specific to a graphic, select **Search** at the bottom of the page.

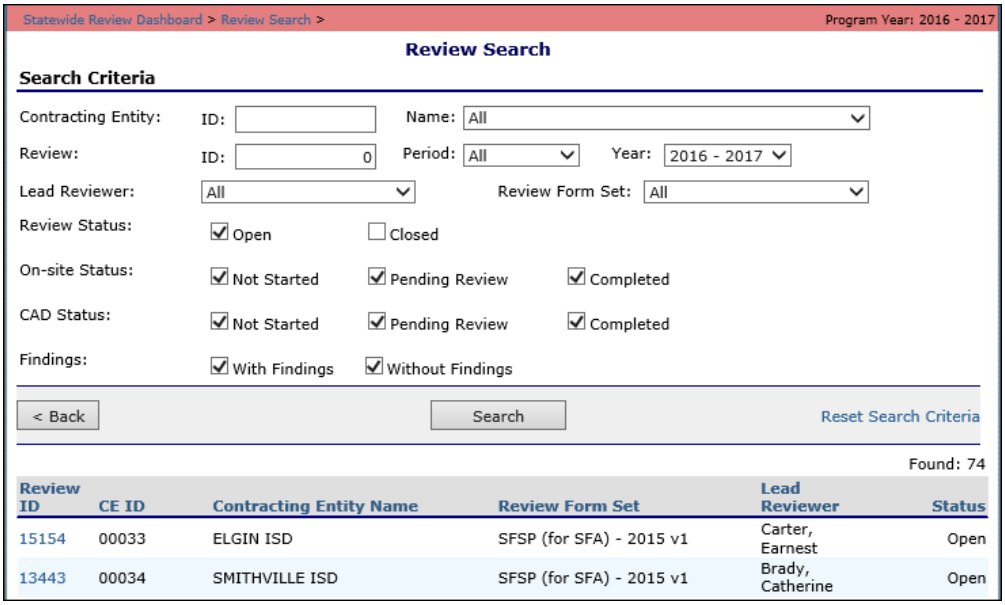

Figure 91: Statewide Review Dashboard Search Screen

6.3 Scheduling a Review

The SFSP review schedule is three (3) years. The State would schedule a new review via the Review Information screen. Once a review is closed by the State (i.e., the Review Status on the Review Information screen is set to "Closed"), the system will automatically schedule the next review in three (3) years, based on the Review Period of the closed review (e.g., if a 2014-15 review is closed in October 2015, the system will automatically schedule the next review for 2017-18).

6.3.1 Adding (Scheduling) a New Review

1. If necessary, search for and select a **CE.**
2. Select **Review Tracking** from the Compliance menu.
3. Select **Add New Review link** to access the Review Information screen.
4. Complete the **Review Information screen**. The following fields are required to schedule a review:
    - Review Type
    - Review Form Set

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Please Note: The State must identify the date when the review process has commenced in the Scheduled Date field to advance the Review Progress bar (on the Review Dashboard) to "Scheduled".

The Scheduled Date is when the Review process is scheduled to commence. This is usually the date when the State preparation for the On-site process is scheduled to begin.

5. Select **Save.**

Please Note: If a Reviewer's name does not appear in the Lead Reviewer drop-down list, contact the State Administrator. The drop-down list is managed by the State via the Maintenance and Configuration > Rep & Consultant User Maintenance screen.

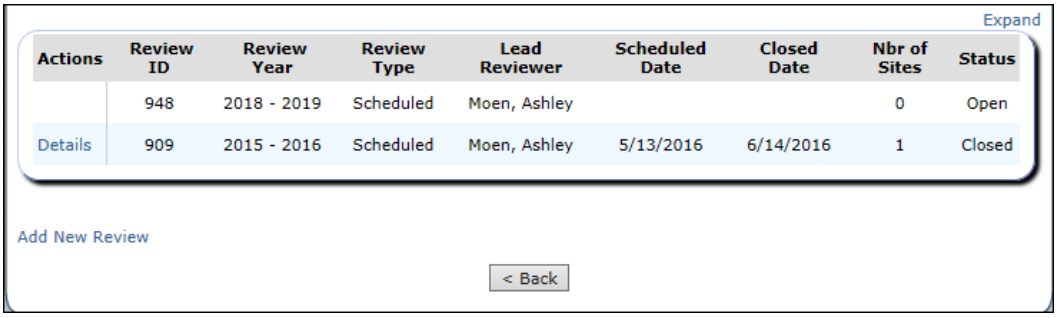

Figure 92: SFSP Reviews List Screen

Tip: *Selecting the* ***Expand link*** *provides additional information regarding the review including Entrance Date, Exit Date, and CAD Due Date. Selecting the* ***Collapse link*** *will return to the default view display.*

Please Note: When a new review is saved, the system will automatically assign it a Review ID. This is a unique identifier for the review that can be used to cross-reference follow-up reviews with original reviews on the Review Tracking screen.

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6.4 Review Information

The Review Tracking screen contains general administrative information about the review. This screen is:

- The first screen completed to schedule a review.
- Used by the State throughout the review process to track key dates, etc.
- The last screen completed to close a review.

Some Review Information is pre-populated based on the CE Profile, Application, and/or Site Applications. Furthermore, there is data entered on this screen that drives the status of the Review Progress Bar and CE access to the Corrective Action documents.

Tip: *The Review Information screen has several overall review-tracking fields. These are completed over the life of the review.*

Tip: *The default Review Status is "Open". When the Review Status is changed by the State to "Closed", the system will automatically schedule the next review in three (3) years.*

If the review was created, but the State will not be performing the review after all, the State can change the Review Status to Re-Scheduled (i.e., the State will schedule the review in another year), Withdrawn, or "Not Completed"

6.4.1 Viewing or Modifying Review Information

1. If necessary, search for and select a **CE.**
2. Select **Review Tracking** from the Compliance menu.
3. Select the **Details link** for the desired review. The Review Dashboard displays.
4. Select the **View or Modify link** next to Review Information.
5. Enter available **data** into the screen.

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6. Select **Save.**

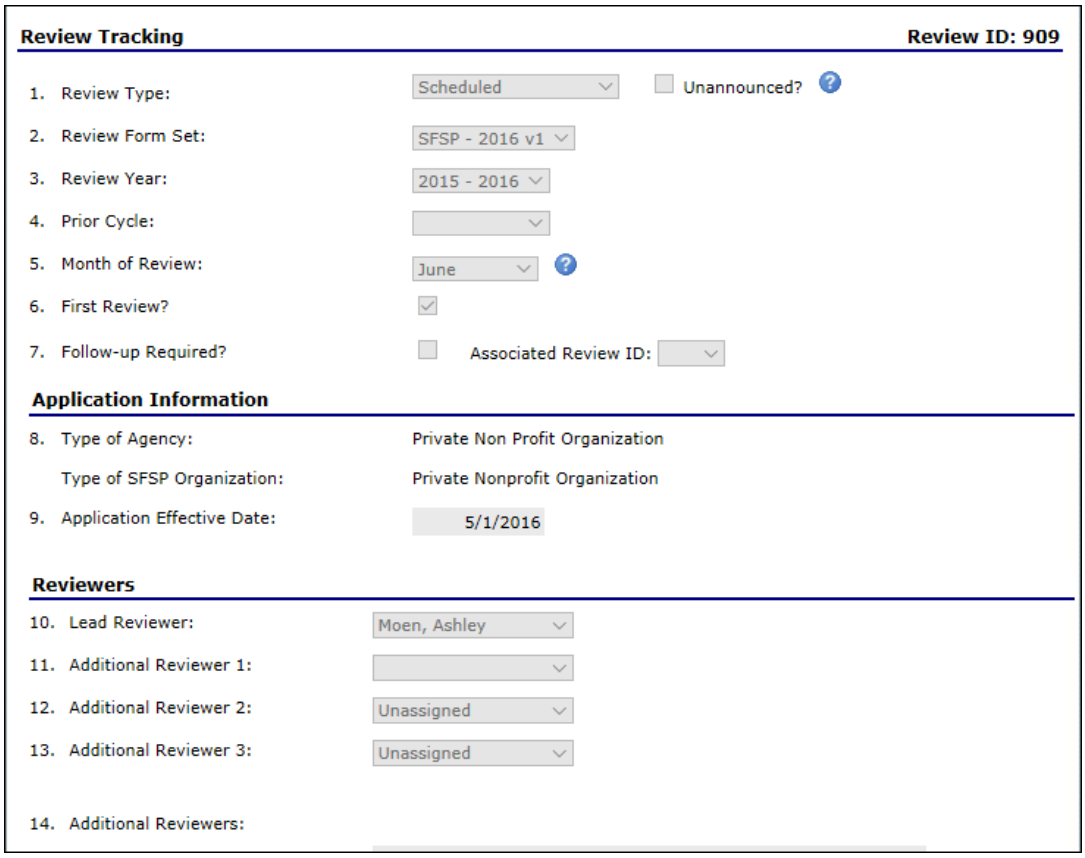

Figure 93: SFSP Reviews List Screen

Please Note: The CE Access to CAD dates determine when the CE will be able to view or modify information prior to the Start Date and will not be able to modify information after the End Date.

6.5 CE Contact Information

The CE Information screen contains general contact information.

6.5.1 Viewing or Modifying CE Contact Information

1. If necessary, search for and select a **CE.**
2. Select **Review Tracking** from the Compliance menu.
3. Select **Details** for the applicable review. The Review Dashboard displays.
4. Select **View or Modify** next to CE Contact Information.

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5. Either identify that the Review Contact is the same as an existing CE contact already identified on the application by checking the respective box or enter the **Review Contact information** if not an existing contact.
6. Select **Save.**

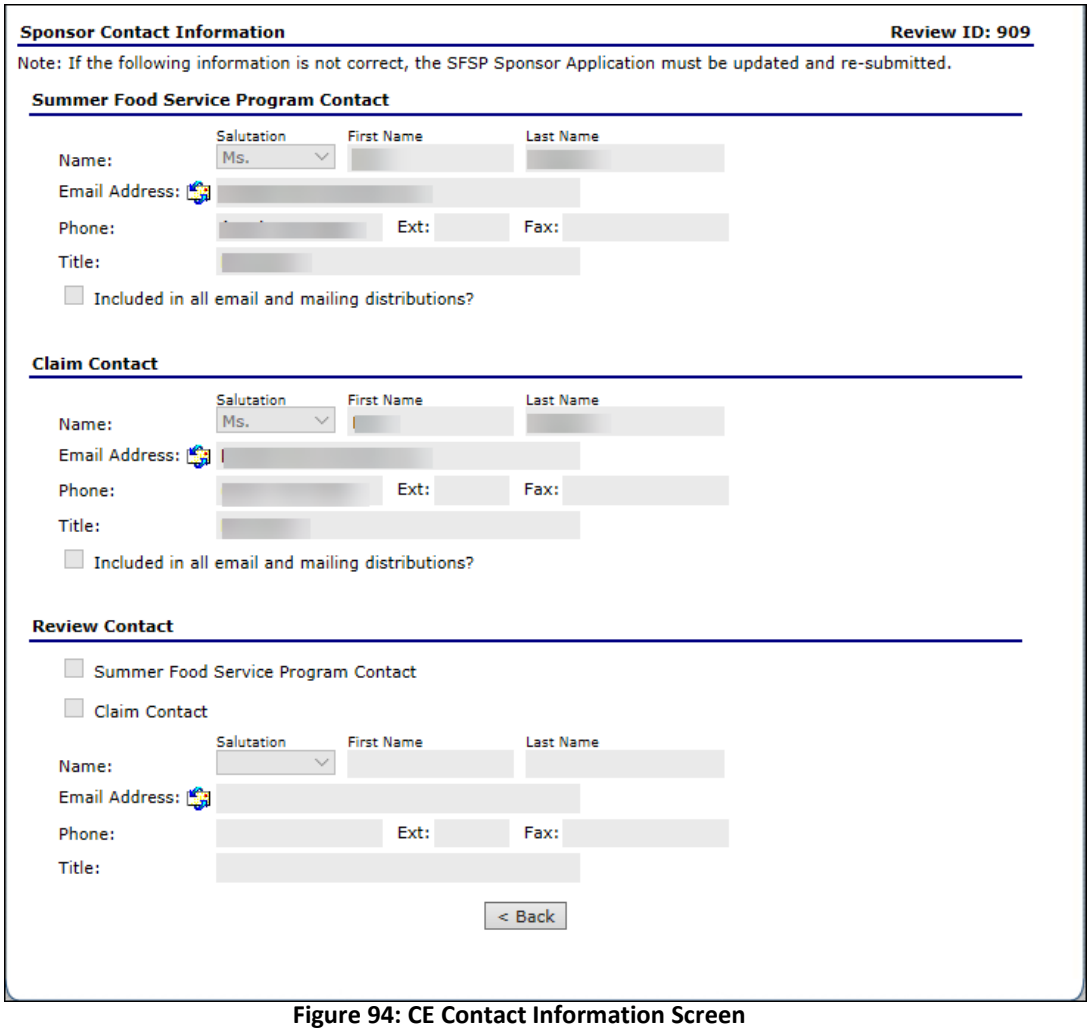

Figure 94: CE Contact Information Screen

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6.6 Site Dashboard

The State can identify and select which sites to include in the Review using the Site Dashboard. The site selection process must occur for the system to create the site-specific review forms for each selected site.

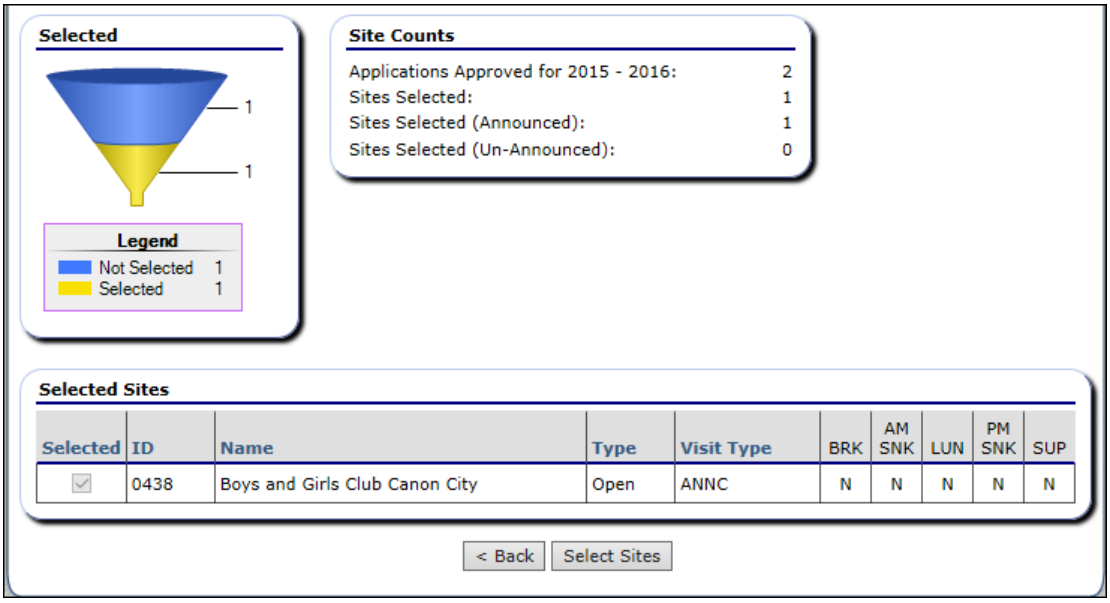

Figure 95: Site Dashboard Screen

6.6.1 Select Sites for the Review

1. If necessary, search for and select a **CE.**
2. Select **Review Tracking** from the Compliance menu.
3. Select **Details** for the applicable review. The Review Dashboard displays.
4. Select **Detail** next to the Site Dashboard option.
5. Click **Select Sites.**
6. Check the **checkbox(es)** next to the sites to include for this meal type review. Site selections can be identified as an Announced or Unannounced visit.

Please Note: Select **Export to Excel** to export the site information displayed on the screen into Microsoft Excel.

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6.7 Review Forms

The Review Forms function is accessed from the Review Dashboard. It contains the State-defined review forms. These forms are categorized into the following as CE-level forms and Site-level forms. A set of forms is created based on each site selected on the Site Selection screen. The review forms contain additional features that are displayed via icons on the form screens. Refer to the following table for a description of these icons.

Icon	Function
	Technical Assistance Clicking this icon will display the Technical Assistance pop-up. The State can enter technical assistance provided to the CE related to the specific question and the CE can view the information. Upon saving, the entered Technical Assistance information is also stored within the Technical Assistance function accessible from the Review Dashboard. Note: Technical Assistance can also be entered via the Technical Assistance menu item on the Review Dashboard. This can be used when the State is providing general Technical Assistance for an area that is not question-specific.
	Error This icon indicates that a question is in is error. The error process is initiated once a user selects the Validate button at the bottom of the review form page. The form will remain in an error status until all required questions have been answered. Hovering over the icon will display the error message.
	State Comment Clicking this icon will display the State Comment pop-up. A State Reviewer can enter internal “tickler” comments related to the corresponding question.
	Tool Tip Hovering over the icon will briefly display additional information that may aid in answering the review question. The user can also click the icon to display the information in a popup. The State creates and maintains their tooltips via the Maintenance and Configuration > Compliance Maintenance screen.
	Attachment Clicking this icon will display the Attachments pop-up window. Select this icon beside the corresponding question to upload a file as an attachment. There is a 15MB size limit to uploaded files.
	Finding Clicking this icon will display the Findings pop-up where the State can enter a finding. All findings are displayed in the Corrective Action Documents screens. Note: Answer responses in red indicate that if that answer is selected, the State should consider identifying a finding that requires corrective action. This is at the discretion of the State Reviewer; the system will not automatically generate a finding when a red answer is selected.

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6.7.1 Accessing the Review Forms (CE-Level)

1. If necessary, search for and select a **CE.**
2. Select **Review Tracking** from the Compliance menu.
3. Select the **Details link** for the applicable review.
4. Select **Detail** next to the Review Forms option.

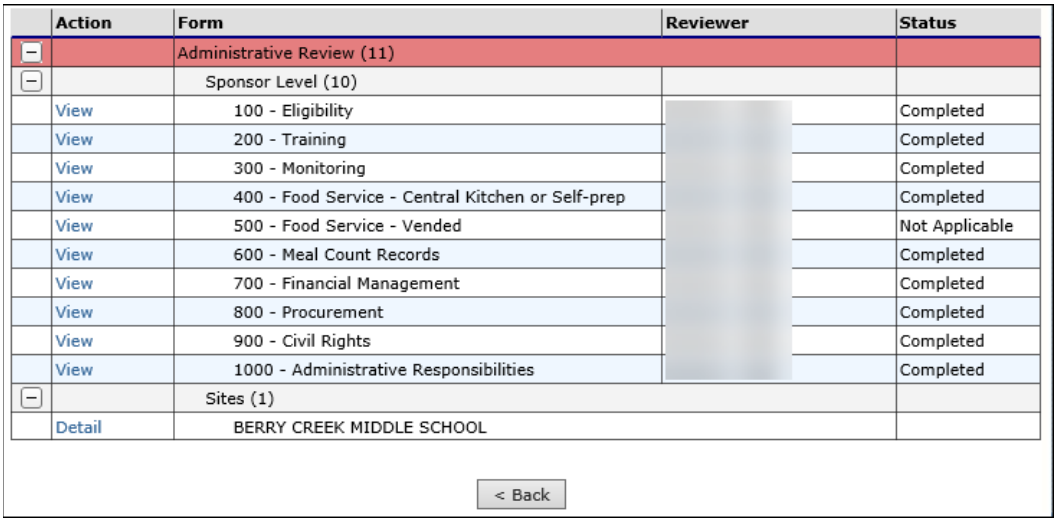

Figure 96: Review Forms Screen

Please Note: A column next to each form is displayed where you can associate a State Reviewer to a specific form and/or to a Site. This drop-down list is managed by the State via the **Maintenance and Configuration > Rep & Consultant User Maintenance screen**.

To apply the same Reviewer to all forms, simply select the Reviewer Name at the highest level (e.g., CE Forms).

6.7.2 Accessing the Review Forms (Site-Level)

1. If necessary, search for and select a **CE**.
2. Select **Review Tracking** from the Compliance menu.
3. Select the **Details link** for the applicable review.
4. Select **Detail** next to the Review Forms option.
5. Select **Detail** next to the **Site** to see the respective Site-level forms. Only sites selected via the Site Selection screen would be displayed on the Review Forms screen.

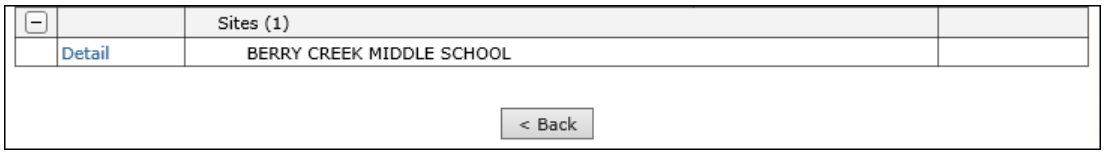

Figure 97: Review Forms Screen

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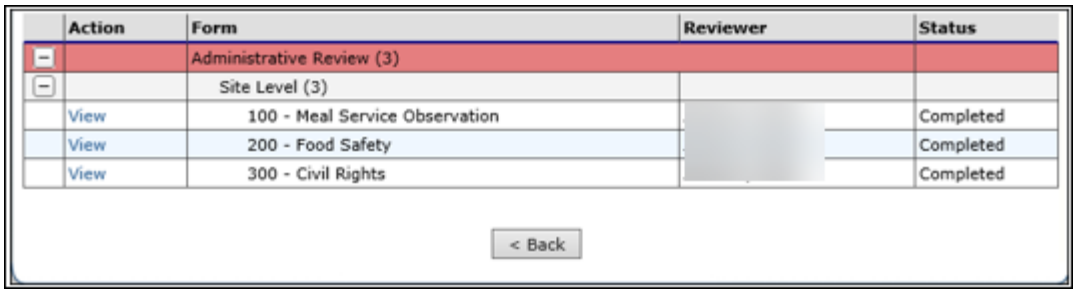

Figure 98: Site-Level Review Forms Screen

6.7.3 Updating the Internal Use Only Section

Each review form has an Internal User Only section that is only viewable to State users. In this section, the State can:

- Enter internal comments regarding this form (i.e., comments are viewable to only State users via the Internal Use Only section).
- Enter comments to the CE regarding this form that are viewable to the CE at the top of the form.
- Manage the form's status.

Some form statuses are automatically set by the system; other form statuses are manually set by the State. The following table provides information regarding the form's Status field in the Internal Use Only section.

Status	Description
Not Started	Default status set by the system if the user has accessed the screen and did not enter any information.
Incomplete	Default status set by the system if the user has accessed the screen, had not completed all required questions, and had not selected for the system to validate the data entered (i.e., Validate button was not selected).
Error	Default status set by the system if errors exist on the screen (e.g., the user has accessed the screen, answered some of the required questions, and had selected for the system to validate the data entered).
Pending Review	Default status set by the system if the user has accessed the screen, all required fields have been completed, and no errors exist on the screen.
Reviewed	Optionally used. Manually set by a State user. Some States may use this status if they have their Lead Reviewer approve all completed forms. The Reviewer would set the status of the form to "Reviewed"; the Lead Reviewer would set the status of the form to "Completed".
Completed	Manually set by the State. Signifies that the form has been designated as "completed" (i.e., no further action required by the CE or State). Some States may use this if they have a Reviewer set the status to "Reviewed" and a Lead Reviewer review each form and would like to set the status to "Completed" to signify that this second-level of review was performed.
Not Applicable	Available for State users to identify forms that are not applicable to a specific review and/or site. The State user may choose to enter a comment in the Internal Comments field to designate why this form will not be completed for this review.

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Please Note: The system does not limit the State's access to the status values. This allows the State to define how they will internally use the Status field on each form, as well as provides the State the ability to change a form status, as the need arises.

6.8 CE-Level Forms

The CE-level forms are review forms to be completed at the CE-level. One set of forms exists for each review.

6.8.1 Completing the CE Forms

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review.
3. Select **Detail** next to the Review Forms option.
4. Select **Modify** for the applicable form.
5. Complete all **review questions.**

Please Note: Answer responses that display in red indicate that the State may want to cite the CE by entering a Finding. Select the icon to enter a Finding. All Findings that require action are displayed in the Corrective Action Documents screen.

Answer responses in red indicate that if that answer is selected, the State should consider identifying ha finding that requires corrective action. This is at the discretion of the State Reviewer; the system will not automatically generate a finding when a red answer is selected.

6. Select **Validate** to save the form and check for errors. If the form contains errors (e.g., a required question was not answered), an error message displays and the form was saved with an Error status.
8. Select **<Edit** to return to the form. Questions with errors display with a red indicator, , beside the question number. Otherwise, select **Finish** to save the data entered and return to the Review Forms screen.

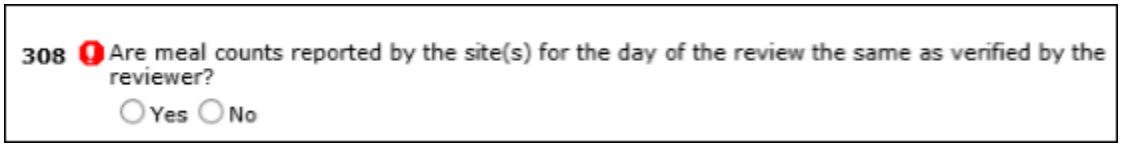

Figure 99: Question with Error

9. Correct any errors and select **Validate**. Once the form has been saved without errors, the status changes to **"Pending Review".**

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Please Note: If a form is not applicable to a specific CE and/or Review, the State can choose **"Not Applicable"** as the form Status so that it displays as such on the **Review Forms screen.**

6.8.2 Finalizing the CE-Level Review Forms

Please Note: If a State chooses to have the Lead Reviewer review and finalize a review completed by a State Reviewer, the steps in this section should be followed.

1. If necessary, search for and select a **CE.**
2. Select **Review Tracking** from the Compliance menu.
3. Select the **Details link** for the applicable review.
4. Select **Detail** next to the Review Forms option.
5. Select **Modify** for the applicable form.
6. Review all **information displayed in the review.**
7. In the Internal Use Only section, select the **"Completed"** status.
8. Enter any **Internal Comments** (viewable by State users only).
9. Select **Validate.**

6.9 Site-Level Forms

The Site-level forms are review forms to be completed at the site level. One set of forms exists for each site selected for review on the Site Selection screen.

6.9.1 Completing the Site-Level On-Site Assessment Forms

1. If necessary, search for and select a **CE.**
2. Select **Review Tracking** from the Compliance menu.
3. Select the **Details link** for the applicable review.
4. Select **Detail** next to the Review Forms option.
5. Select **Detail** for the applicable site.
6. Select **Modify** for the applicable form.
7. Complete all review questions.
8. Select **Validate** to save the form and check for errors. If the form contains errors (e.g., a required question was not answered), an error message displays and the form was saved with an **Error** status.

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9. Select **<Edit** to return to the form. Questions with errors display with a red indicator, beside the question number.

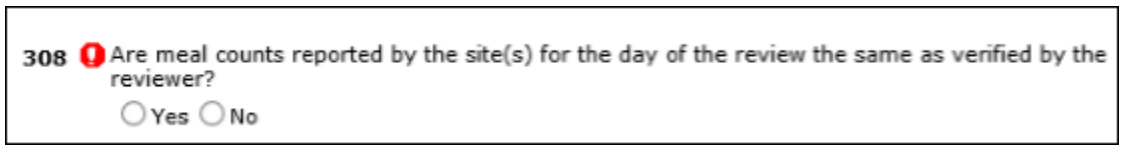

Figure 100: Question with Error

10. Correct any errors and select **Validate**. Once the form has been saved without errors, the status changes to **"Pending Review".**

6.10 Corrective Action Documents

The system allows authorized State users to enter a CAD due date and apply the due date to all open and returned (i.e., denied) CADs. This is a time-saver by eliminating the need for the State to enter dates on each individual CAD as they are developed or to have to open each CAD once a due date is determined.

6.10.1 Accessing Corrective Action Documents/Findings

1. Search for and select a CE, if necessary.
2. Select **Review Tracking** from the Compliance menu.
3. Select the **Details link** for the applicable review.
4. Select the **Modify link** next to Corrective Action Documents**.** The Findings screen displays.
5. Enter the **due date** in the Review Findings and Corrective Action Documents textbox.
6. Select **Update.** All individual CAD Due Dates will display the new date.

6.10.2 Accessing Corrective Action Documents/Findings

1. If necessary, search for and select a **CE.**
2. Select **Review Tracking** from the Compliance menu.
3. Select the **Details link** for the applicable review.
4. Select the **View** or **Modify link** next to Corrective Action Documents. The Findings screen displays.
5. Select the **Finding:**
    - To access a CE-level corrective action, select the **View or Modify link** next to the Finding. The Findings screen is displayed with the respective finding.
    - To access a Site-level corrective action, select the **View or Modify link** next to the Finding. The Findings screen is displayed with the respective Finding and the list of sites with the Finding.

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6. The Findings Details screen displays. Update **the Finding Description** and **Required Corrective Action** as needed.
7. Select **Save.**

Tip: *The Show/Hide History link displays the Finding History log with all changes made to the Findings Detail screen, logged by date/time and user.*

6.11 Corrective Action Documents Status Codes

The system automatically sets statuses based on actions performed by the user. The following table identifies the various status codes associated with a CAD and under what conditions the status is set.

Status	Description
Not Started	Default status set by the system. Finding has been identified, but no updates to the finding by the CE or the State has occurred. Updates "Not Started" count on the summary screen.
Pending Action	Automatically set by the system when the Finding, Finding Description, and Required Corrective Action fields are completed by the State, the Corrective Action Required field in the Finding Tracking section is set to "Action Required" and the user selects the Save button. Updates "Pending Action" count on the summary screen.
Pending Submission	Automatically set by the system when the Agency Corrective Action Response field has been completed by the CE and the user selects the Save button. Updates "Pending Submission" count on the summary screen.
Pending Approval	CE has submitted their CAD for the State to review. Automatically set by the system when the user selects the Submit for Acceptance button and there are no errors. Updates "Returned" count on the summary screen.
Returned	Automatically set by the system when the State has selected the CAD Not Approved button. Updates "Returned" count on the summary screen.
Closed	Automatically set by the system when the State has selected the Accept CAD button. Updates "Accepted" count on the summary screen.

Please Note: A Re-Open button is available to State users on closed CADs (i.e., status of the CAD is Closed). If the State decides to re-open a CAD, the status of the CAD returns to Not Started.

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6.11.1 Updating a Finding (State Perspective)

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review.
3. Select the **Modify link** next to Corrective Action Documents. The Findings summary screen displays.
    - To access a CE-level corrective action, select the **Modify link** next to the finding. The Findings screen is displayed with the respective finding.
    - To access a **Site-level** corrective action, select the **Modify link** next to the finding. The Findings screen is displayed with the respective finding and the list of sites with the finding.
4. Update the **Finding Description, Corrective Action, and/or Special Instructions textbox(es).**
5. Select **Save.**

6.11.2 Responding to a Finding (CE Perspective)

1. Select **Review Tracking** from the Compliance menu**.**
2. Select the **Details link** next to a corresponding review.
3. Select the **Modify link** next to Corrective Action Documents**.** The Findings summary screen displays.
    - To access a CE-level corrective action, select the **Modify link** next to the finding. The Findings screen is displayed with the respective finding.
    - To access a Site-level corrective action, select the **Modify link** next to the finding. The Findings screen is displayed with the respective finding and the list of sites with the finding.

Please Note: A CE may submit a single corrective action if the same Finding was identified at multiple sites. The number of sites with the Finding is displayed in the Site Findings table grid on the Findings page, as well as the bottom of the Findings Detail Page.

4. The **Findings Details screen** displays.
5. Enter the **Corrective Action Response** in the textbox.
6. If the user would like to add an attachment, select **Add an Attachment**. The Findings File Upload Detail screen displays. There is a 15MB size limit to uploaded files.

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7. Select **Browse**, then navigate to the file to upload.
8. Enter a **description.**
9. Add an **attachment** to supplement your corrective action response, if applicable

Please Note: Multiple attachments may be entered; however, the Add an Attachment link must be selected for each individual attachment.

Selecting **Modify** and then **Browse** for an existing attachment will overwrite the previous file with the new file.

10. Select **Save.**
11. Select **Submit for Acceptance**.

Please Note: The Agency Correction Action Response field is available to CEs only. State users do not have Modify access to this field.

6.11.3 Reviewing a CAD (State Perspective)

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review to access the Review Dashboard.
3. Select the **View or Modify link** next to Corrective Action Documents. The Findings screen displays.
4. Select the **Finding:**
    - To access a CE-level corrective action, select the **Modify link** next to the desired Finding with a status **of "Pending Approval".** The **Findings screen** is displayed with the respective finding.
    - To access a **Site-level corrective action**, select the **Site link**. The **Site Findings screen** is displayed. Select the **View** or **Modify link** next to the applicable Finding with a status of "Pending Approval". The Findings screen is displayed with the respective finding and the list of sites with the finding.
5. Review the **information** submitted by the CE.
6. To view attachments, select **View** for each attachment listed under Document Attachments. The computer will prompt the user to Open or Save the file.
7. Enter the **Reviewer Response to CAD** in the textbox.

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8. If the CAD is ready to be approved, select the **Accept CAD button**. This will change the status of the CAD to "Closed". If any changes need to be made after the CAD is closed, a State user must reopen the CAD.
9. If the CAD is not ready to be approved, select the **CAD Not Approved button.** This will change the status of CAD to Denied. The CE must then correct and re-submit the CAD for approval.

6.11.4 Deleting a Finding

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review. **The Review Dashboard** displays.
3. Select the **View or Modify link** next to Corrective Action Documents. The Findings screen displays.
4. Select the **Finding:**
    - To access a CE-level corrective action, select the **Modify link** next to the applicable **Finding** with a status of "Pending Approval". The Findings screen is displayed with the respective finding.
    - To access a Site-level corrective action, select the **Site link**. The Site Findings screen is displayed. Select the **View** or **Modify link** next to the applicable Finding with a status of "Pending Approval". The Findings screen is displayed with the respective finding and the list of sites with the finding.
5. Select **Delete** in the top-right corner.
6. Select the **Delete button** to confirm.

6.12 Commendations

The Commendations feature provides the ability for the State to enter commendations for the CE and/or the sites being reviewed.

6.12.1 Adding a Commendation

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review. The Review Dashboard displays.
3. Select **Modify link** next to Commendations.
4. Select the **Add New Commendation** at the CE- or site-level.
5. Enter the **Commendation description.**
6. Select **Save.**

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6.12.2 Viewing or Modifying a Commendation

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review. The Review Dashboard displays.
3. Select **View** or **Modify link** next to Commendations.
4. Select **View** or **Modify** next to the Commendation to review or modify.
5. Make any necessary **changes** (as applicable).
6. Select **Save.**

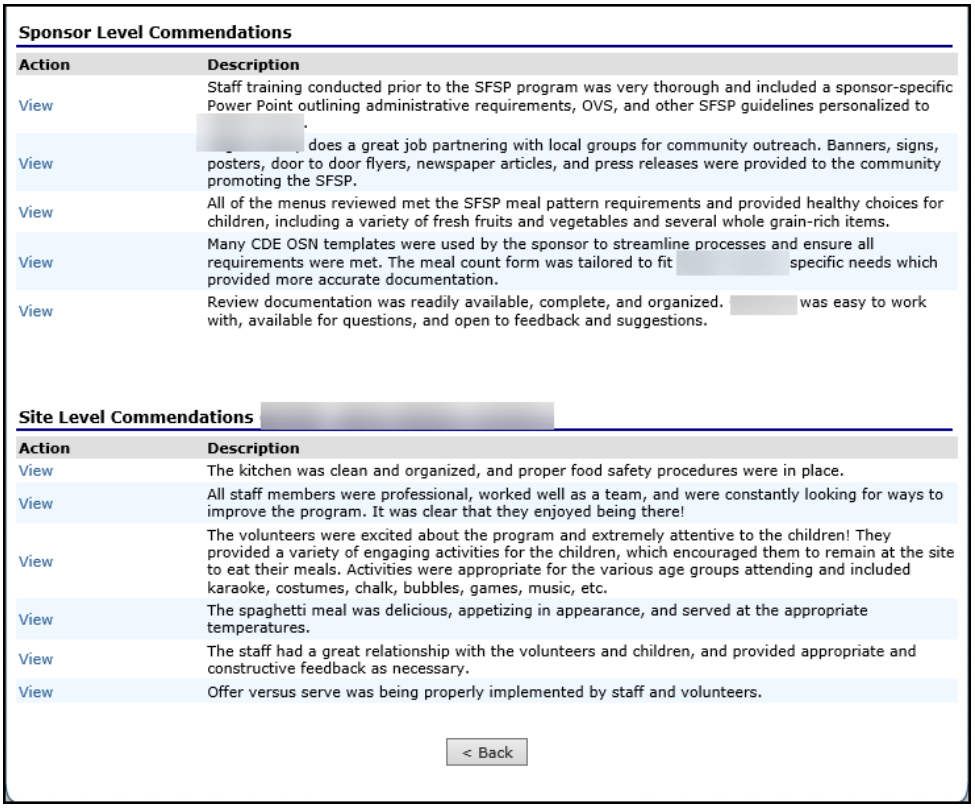

Figure 101: Commendations Screen

6.12.3 Deleting a Commendation

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review. The Review Dashboard displays.
3. Select **View** or **Modify** for Commendations.
4. Select **View** or **Modify** next to the applicable Commendation.
5. Select **Delete** in the top-right corner.
6. Select the **Delete button** to confirm.

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6.13 Technical Assistance

The Technical Assistance (TA) function enables the State to enter and track technical assistance provided to CEs or sites. This menu option is an alternative method for documenting technical assistance via the Off-site or On-site forms Ⓣ icon. Technical Assistance can be provided at a CE-level or site-level.

Please Note: Technical Assistance logged at a question-level via the review forms is also displayed on the Technical Assistance list screen. When requesting that a CE reviews Technical Assistance, the State can direct the CE to this screen to see all assistance provided throughout the review process.

6.13.1 Adding Technical Assistance

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review. The Review Dashboard displays.
3. Select the **Modify link** for Technical Assistance**.** The Technical Assistance list page displays.
4. Select **Add CE Technical Assistance** or **Add Site Technical Assistance link**. The Technical Assistance pop-up displays.
5. Enter the **Technical Assistance details**.
6. Select **Save.**

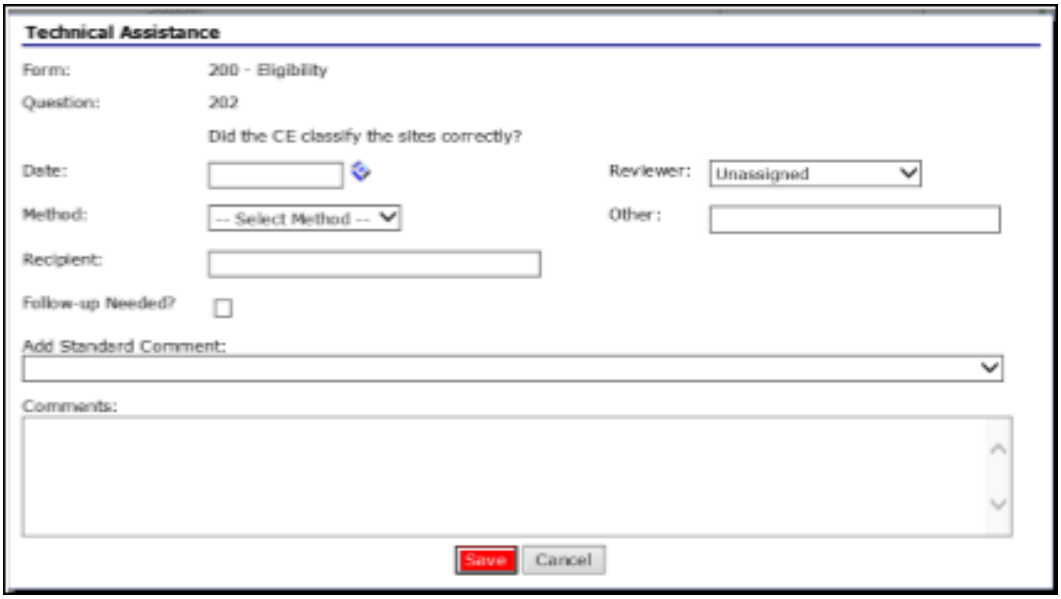

Figure 102: Technical Assistance (Details) Screen

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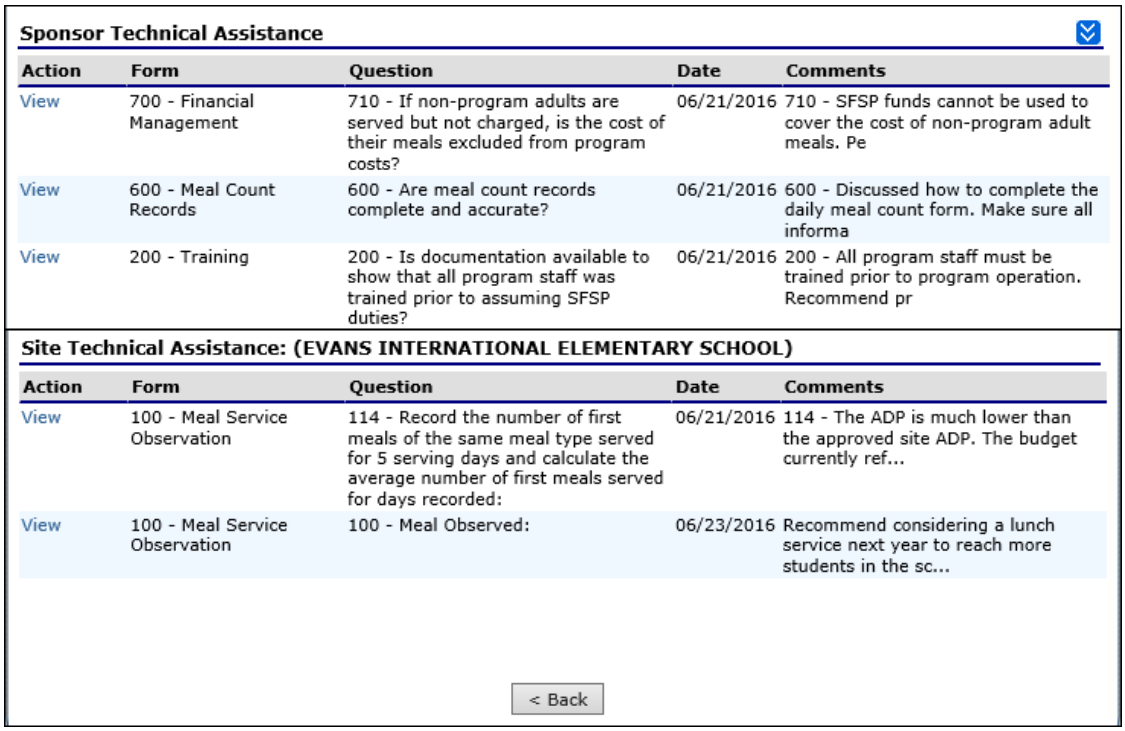
6.13.2 Viewing or Modifying Technical Assistance

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review. The Review Dashboard displays.
3. Select the **View or Modify link** for Technical Assistance to access the list page.



Sponsor Technical Assistance

Action	Form	Question	Date	Comments
View	700 - Financial Management	710 - If non-program adults are served but not charged, is the cost of their meals excluded from program costs?	06/21/2016	710 - SFSP funds cannot be used to cover the cost of non-program adult meals. Pe
View	600 - Meal Count Records	600 - Are meal count records complete and accurate?	06/21/2016	600 - Discussed how to complete the daily meal count form. Make sure all informa
View	200 - Training	200 - Is documentation available to show that all program staff was trained prior to assuming SFSP duties?	06/21/2016	200 - All program staff must be trained prior to program operation. Recommend pr

Site Technical Assistance: (EVANS INTERNATIONAL ELEMENTARY SCHOOL)

Action	Form	Question	Date	Comments
View	100 - Meal Service Observation	114 - Record the number of first meals of the same meal type served for 5 serving days and calculate the average number of first meals served for days recorded:	06/21/2016	114 - The ADP is much lower than the approved site ADP. The budget currently ref...
View	100 - Meal Service Observation	100 - Meal Observed:	06/23/2016	Recommend considering a lunch service next year to reach more students in the sc...

< Back

Figure 103: Technical Assistance List Screen

4. Select **View or Modify** next to the applicable Technical Assistance.
5. Make any necessary **modifications.**
6. Select **Save.**

6.13.3 Deleting Technical Assistance

1. Search for and select a **CE,** if necessary.
2. Select **Review Tracking** from the Compliance menu.
3. Select the **Details link** for the applicable review. The Review Dashboard displays.
4. Select **View or Modify** for Technical Assistance. The Technical Assistance pop-up displays.
5. Select the **red X icon** in the top right of the pop-up. A delete confirmation message is displayed
6. Select **Delete.**

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6.14 Notes to Contracting Entity

The Notes to Contracting Entity screen provides the ability for the State to enter notes that can be viewed by the CE. These are usually comments or instructions that apply to the review in its entirety.

6.14.1 Viewing Notes to Contracting Entity

1. From the Review Dashboard, select **View** next to Notes to Contracting Entity.
2. Select the **View link** next to the Notes to Contracting Entity.
3. Select **View** next to the corresponding Note. The Detail screen displays.
4. Make any necessary **modifications.**
5. Select **Save.**

6.15 State Agency Notes

The State Notes screen(s) provide the ability for the State to enter internal only notes that are not viewable by the CE. These are usually comments or instructions that apply to the review in its entirety, as opposed to a specific form (which would be entered in the Comments to CE field on the Internal Use Only section of each Off-site Assessment form).

6.15.1 Adding a Note

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review. The Review Dashboard displays.
3. Select the **Modify link** for State Notes.
4. Select **Add Note.**
5. Enter the **Subject in the textbox.**
6. Enter the **Note text in the textbox.**
7. Select **Save.**

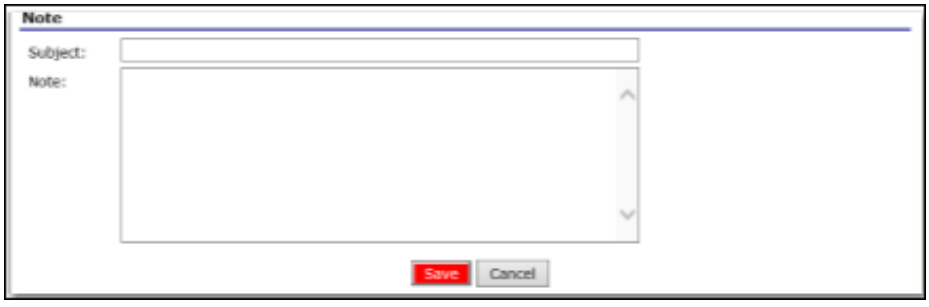

Figure 104: State Notes Screen

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6.15.2 Viewing or Modifying Notes to CE

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review. The Review Dashboard displays.
3. Select the **View or Modify link** next to Notes to CE to access the list screen.
4. Select the **date link** for the note to **view or modify.** The Notes to CE Detail screen displays.
5. Make any applicable **changes.**
6. Select **Save.**

6.16 Review Attachments

The Review Attachments function enables the CE and State users to upload documents and files into the system for centralized storage. These are usually attachments that apply to the review in its entirety, as opposed to a specific question (which would be performed via the paperclip icon on the assessment form).

6.16.1 Uploading an Attachment

1. Search for and select a **CE,** if necessary.
2. Select **Review Tracking** from the Compliance menu.
3. Select the **Details link** for the applicable review. The Review Dashboard displays.
4. Select **Detail** for Review Attachments to access the list screen displays.

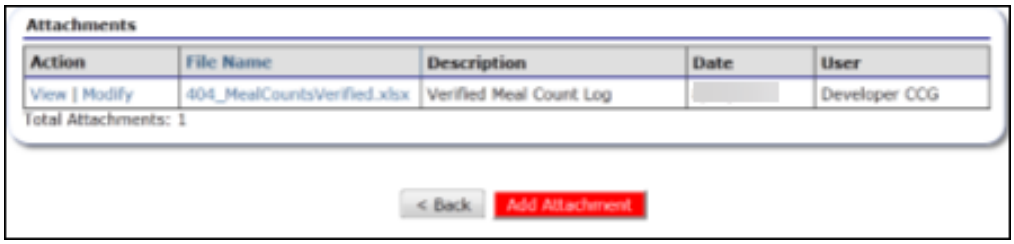

Figure 105: Attachment List Screen

5. Select **Add Attachment.** There is a 15MB size limit to uploaded files.
6. Select **Browse**, then navigate to the file on the computer to upload.
7. Enter a **description**, if applicable.
8. Click **Save.**

6.16.2 Viewing or Modifying Attachment Details

1. Search for and select a **CE**, if necessary.
2. Select **Review Tracking** from the Compliance menu**.**

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3. Select the **Details link** for the applicable review. The Review Dashboard displays.
4. Select **Detail** for Review Attachments. The Attachment List screen displays.
5. Select **View or Modify** for the applicable attachment.
6. Modify the **description**, if applicable.
7. Click **Save.**

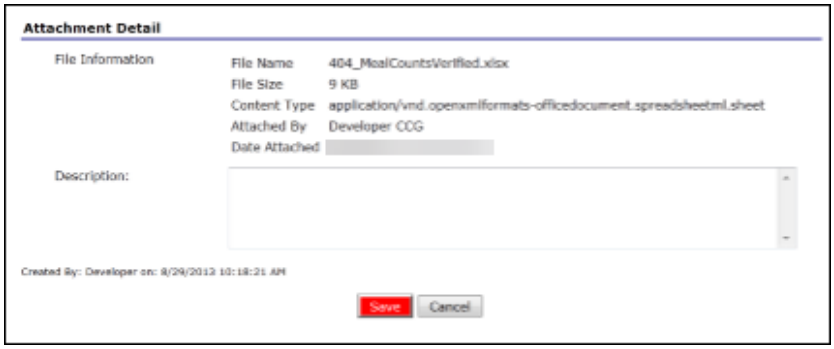

Figure 106: Attachment Detail Screen

6.16.3 Viewing an Attachment

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review. The Review Dashboard displays.
3. Select **Detail** for Review Attachments.

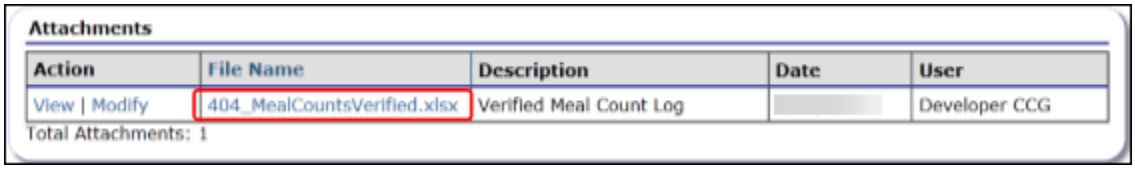

Figure 107: Attachment List Screen

4. Select the **File Name link.**
5. Open or save the **file** to the computer.

6.16.4 Deleting an Attachment

1. Select **Review Tracking** from the Compliance menu.
2. Select the **Details link** for the applicable review. The Review Dashboard displays.
3. Select **Detail** for Review Attachments.
4. Select **View** or **Modify** for the applicable attachment.
5. Select **Delete** in the top-right corner.
6. Confirm by selecting the **Delete button.**

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6.17 Time Tracking

The Time Tracking function enables the State to enter and track time spent on various activities associated with a review. This is an optional feature procured by some States. Prior to utilizing the Time Tracking function, the State must define the activities they would like to track time against via the Compliance Maintenance module located within the Maintenance & Configuration > Maintenance module. Defined Activity Types apply to all administrative review.

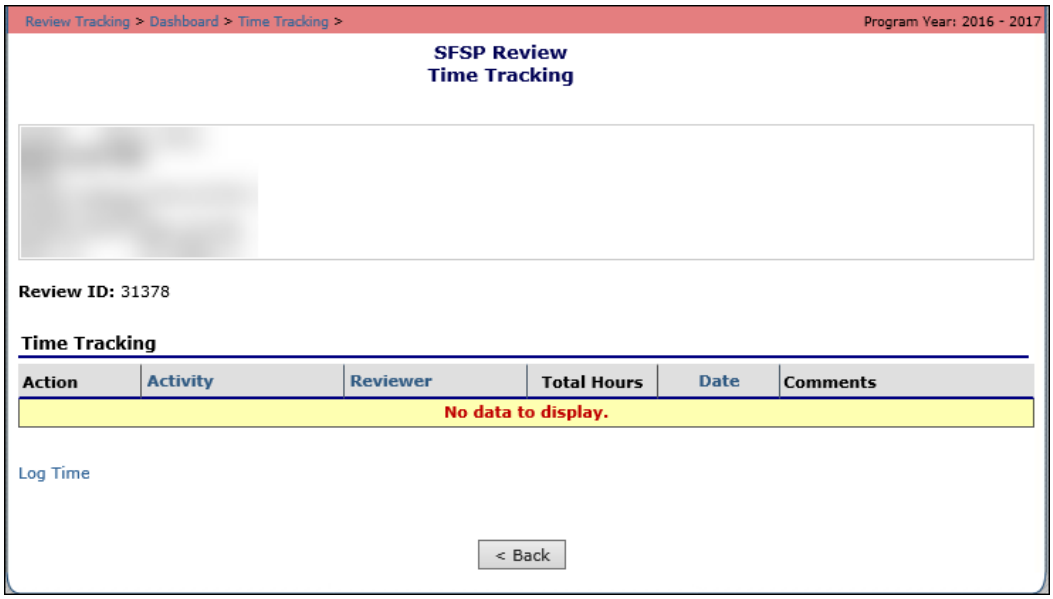

Figure 108: Time Tracking Screen

6.17.1 Logging Time

1. From the Compliance menu, select **Review Tracking.**
2. Select the **Details link** for the desired review to access the Dashboard.
3. Select **Detail for Time Tracking** the list screen will display.
4. Select **Log Time link**, a pop-up will display.
5. Enter the **time details.**
6. Select **Save.**

Please Note: The Activity drop-down list is controlled by the State via the Compliance Maintenance screen.

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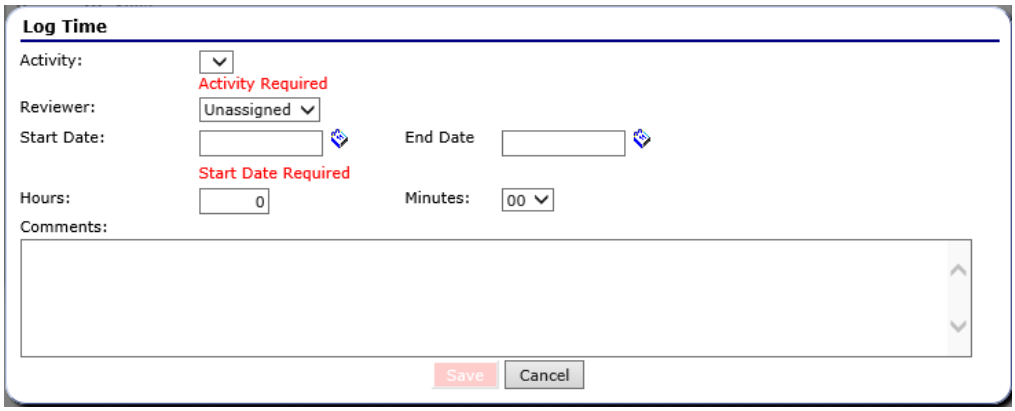

Figure 109: Log Time Pop-Up Screen

6.17.2 Viewing or Modifying Time

1. From the Compliance menu, select **Review Tracking.**
2. Select the **Details link** for the desired review to access the Dashboard.
3. Select **Detail for Time Tracking**, the list screen displays.
4. Select **View** or **Modify**, the Time Tracking pop-up screen displays.
5. Make **revisions.**
6. Select **Save.**

6.17.3 Deleting Logged Time

1. Search for and select a CE.
2. From the Compliance menu, select **Review Tracking.**
3. Select the **Details link** for a review to access the Dashboard.
4. Select **Detail for Time Tracking**, the list screen displays.
5. Select **Modify** for activity to delete to display the Log Time pop-up.
6. Select the **red X icon** in the top right of the pop-up. A delete confirmation message is displayed.
7. Select **Delete.**

Please Note: To remove an activity from the Log Time Activity drop-down, enter an End Date as to when the activity should no longer be available for selection by the user.

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6.18 Correspondence Tracking

The Correspondence Tracking function enables the State to log correspondence sent to or received by the CE. These are usually letters and notifications send to the primary authorized representative for the CE regarding the Review. This is an optional feature procured by some States. Prior to utilizing the Correspondence Tracking function, the State must define the activities they would like to track time against via the Compliance Review maintenance module located within the Maintenance & Configuration > Maintenance Defined areas and types of correspondences apply to all administrative review.

6.18.1 Logging Sent or Received Correspondence

1. Search for and select a **CE** if necessary.
2. Select **Review Tracking** from the Compliance menu.
3. Select the **Details link** for the applicable review. The Review Dashboard displays.
4. Select **Detail** for Correspondence Tracking. The Correspondence Tracking list screen displays.
5. Select **Add Correspondence link**. The Tracking Correspondence pop-up displays.
6. Enter **correspondence details.**
7. Select **Save.**

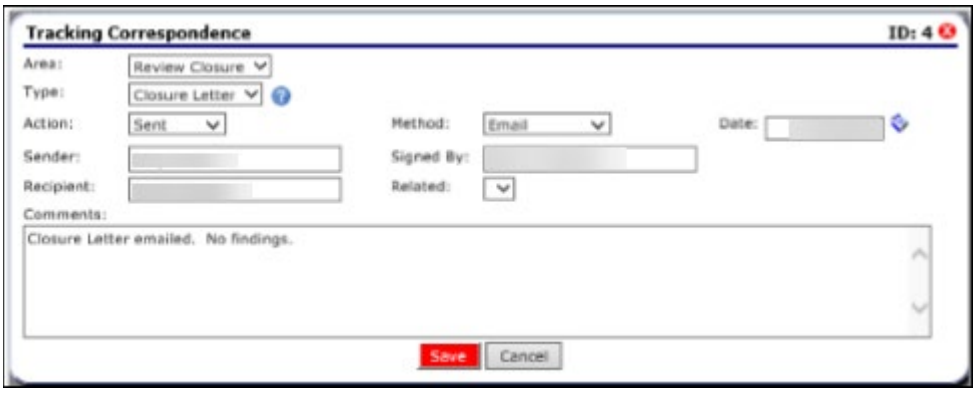

Figure 110: Attachment List Screen

Please Note: The Area and Type drop-down lists are controlled by the State via the Compliance Review maintenance screen.

Please Note: The State can associate two (2) correspondences by using the Related field. The Related field lists all correspondences logged for this review.

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6.18.2 Viewing or Modifying a Correspondence Entry

1. Search for and select a **CE**, if necessary.
2. Select **Review Tracking** from the Compliance menu.
3. Select the **Details link** for the applicable review. The Review Dashboard displays.
4. Select **Detail** for **Correspondence Tracking.** The Correspondence Tracking list screen displays.

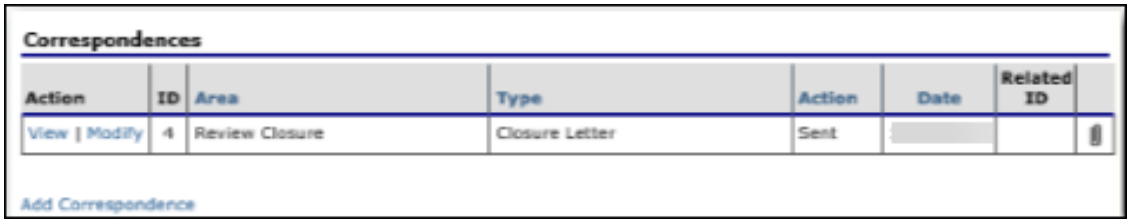

Figure 111: Correspondence Tracking List Screen

5. Select **View** or **Modify.** The Correspondence Tracking pop-up screen displays.
6. Make any necessary **modifications.**
7. Select **Save.**

Please Note: After a correspondence has been logged, the user can add an attachment to the entry. To add an attachment to the correspondence entry (e.g., to attach the Introductory Letter), click the **paperclip icon.** The system will display a pop-up box whereby the user would select **Add Attachment** and upload the respective file. There is a 15 MB size limit to uploaded files.

6.18.3 Deleting a Correspondence

1. Search for and select a **CE**, if necessary.
2. Select **Review Tracking** from the Compliance menu.
3. Select the **Details link** for the applicable review**.** The Review Dashboard displays.
4. Select **Detail** for Correspondence Tracking**.** The Correspondence Tracking list screen displays. Select **View** or **Modify** for the correspondence entry to view or modify. The Correspondence Tracking pop-up screen displays.
5. Select the **red X icon** in the top right of the pop-up. A delete confirmation message is displayed
6. Select **Delete.**

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7.0 Reports

Standard Reports for the Summer Food Service Program are available to users through the TX-UNPS Reports component.

7.1 Reporting

The Reports component of the SFSP module enables users to run, view, and print reports containing data maintained within TX-UNPS. The Report List contains all reports available within the SFSP module. Once a user selects a particular report, TX-UNPS may prompt the user for additional parameters information.

Access to the Reports menu is provided only to authorized State users to help review and manage statewide data. The Reports menu displays only reports to which the user has access.

7.1.1 Generating a Report

1. On the blue menu toolbar, select **Reports**. Select **Reports** under the Item column. The Reports menu screen displays.
2. Select a **report** to generate. The respective report's parameters screen will display.
3. Identify the **reports parameters.**
4. Select **Create Report.** The report is generated and displays in a new browser window.

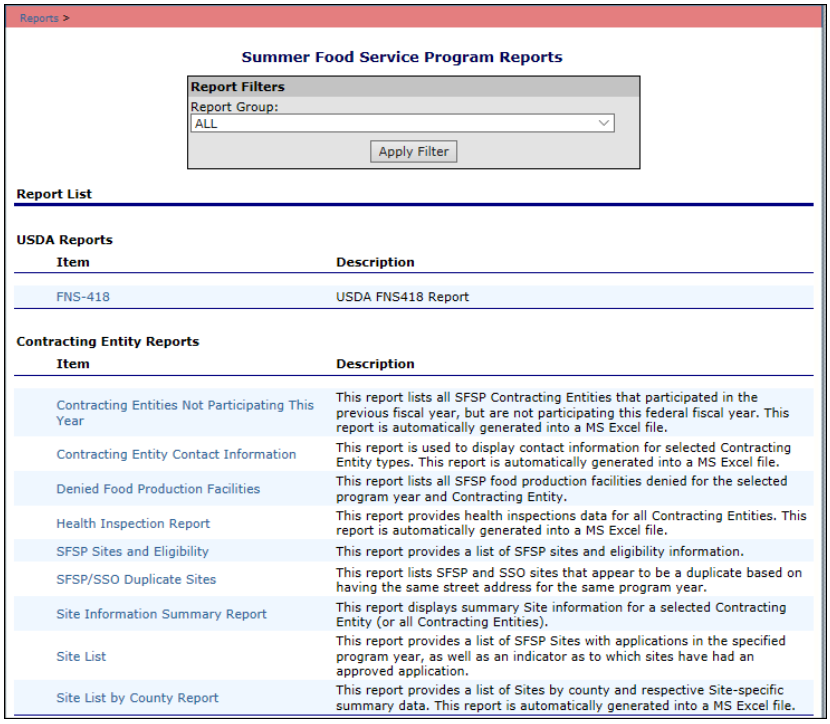

Figure 112: Summer Food Service Program Reports (Partial)

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7.1.2 Reporting Parameters

Most reports require one or more parameters to be entered in order to customize the report to the user's specific needs. Report parameters are useful to also limit data contained in the report or control how the information is sorted or grouped. Below is an example of a report parameters screen.

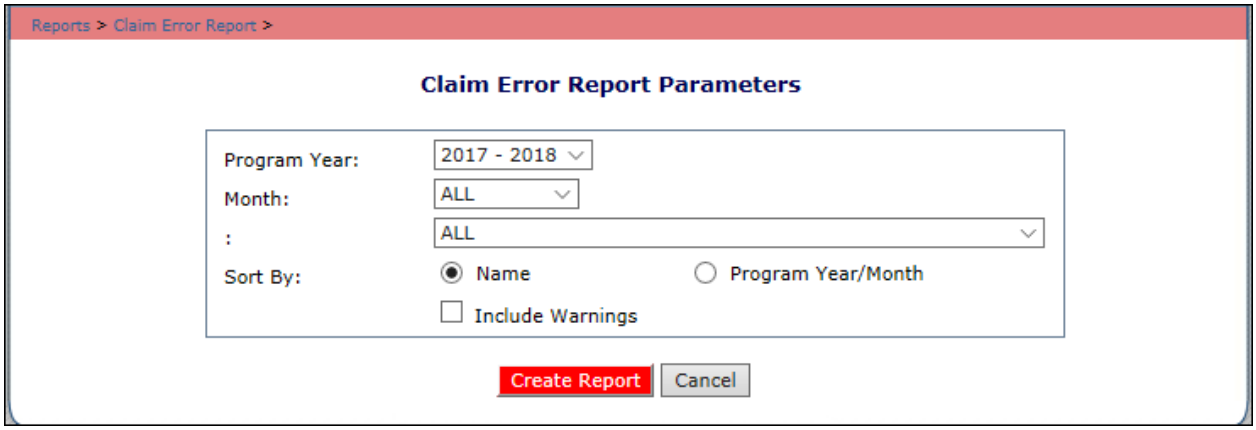

Figure 113: Example of Report Parameters– Contracting Entity Contact Information Report

7.2 Reporting Functions

Most SFSP reports automatically open in a new window using Microsoft Excel so that the user can manipulate and format the data as needed without assistance from a technical person. If a report is not generated automatically in Microsoft Excel (i.e., the report is s Microsoft Report Services reports) a window opens that allows the user to:

- View the report, page-by-page.
- Change the zoom percentage of the displayed report.
- Search the report using the "Find/Next" feature.
- Select to export the report data (see next section).
- Select to print the report or specific pages.

7.2.1 Exporting a Report

If the report does not default to a Microsoft Excel format, the user can export the report in a variety of formats including: .XML, .CSV, .PDF, and Microsoft Excel.

1. In the top menu bar of the generated report, select a format in the **Select a format** box. The Export link becomes active.

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2. Select **Export.**
3. The system will open a new window and display a pop-up confirmation asking to open or save the file.

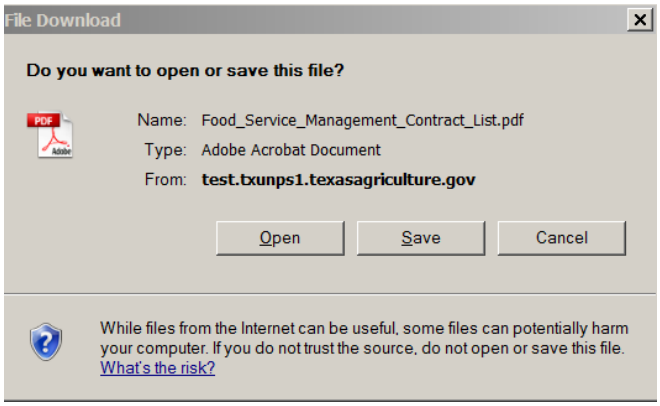

Figure 114: Microsoft's File Download Pop-up Window

4. Select either the **Open** or **Save** option.
5. The desktop software will manage the opening or saving of the file.

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8.0 Security

System-authenticated users (i.e., users that are logged on) may change their password through the Change Password feature.

8.1 Security Menu

The Security menu option within the Summer Food Service Program module is the access point to the Change Password and User Manager functions.

8.1.1 Accessing the Security Menu

1. Select **Security** on the blue menu bar at the top of the page.
2. Select a **security item** to access that security function.

8.1.2 Accessing Change Password

1. On the blue menu toolbar, select **Security**.
2. On the Security menu, select **Change Password.** The Change Password screen displays.
3. Enter your **New Password**.
4. Re-Enter the **New Password.**
5. Select **Save**. A confirmation message displays.
6. Select **<Edit** to return to the Change Password screen or select **Finish** to return to the Security menu.

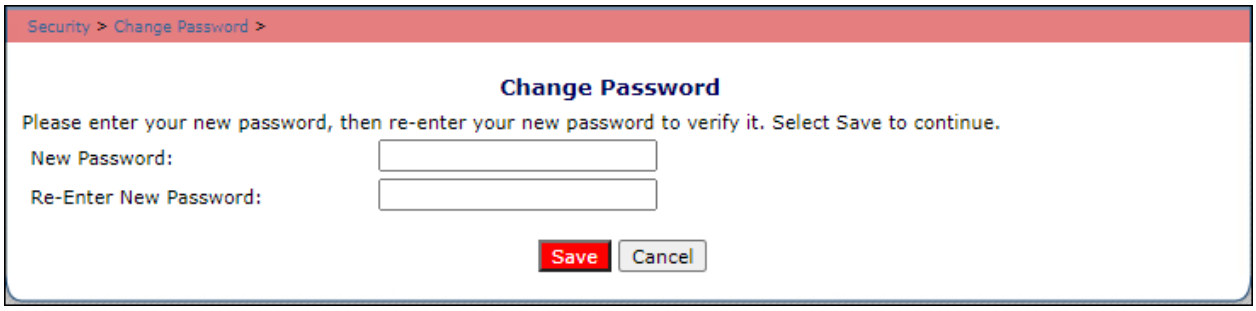

Figure 115: Change Password Screen

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8.2 User Manager

The User Manager allows you to set up and maintain various components of a user's security access. This feature enables authorized administrators to add new users, maintain User's Profiles, change passwords, and set assigned groups, security rights and associated Institutions.

8.2.1 Searching for a User

Before proceeding in the User Manager, the user must be searched for and selected. If you have already selected a user or are elsewhere in the application, return to the User Manager screen.

1. On the User Manager screen, select the type of **search** on the **Search By** drop-down list (Last Name or Username) and select **Search** or click **All** to display a list of all users. A list of users matching the search criteria displays.

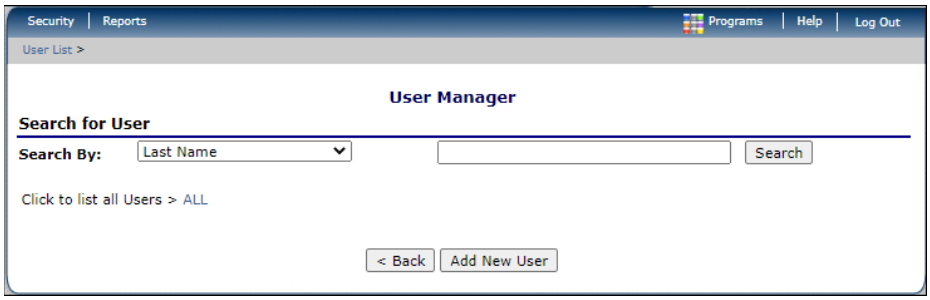

Figure 116: User Manager Search Screen

Please Note: State Employees are listed in Bold. Security Administrators are indicated by "Yes" in the Administrator column. Not all State Employees are Security Administrators.

2. Select a **user** to access. The User Options menu displays.

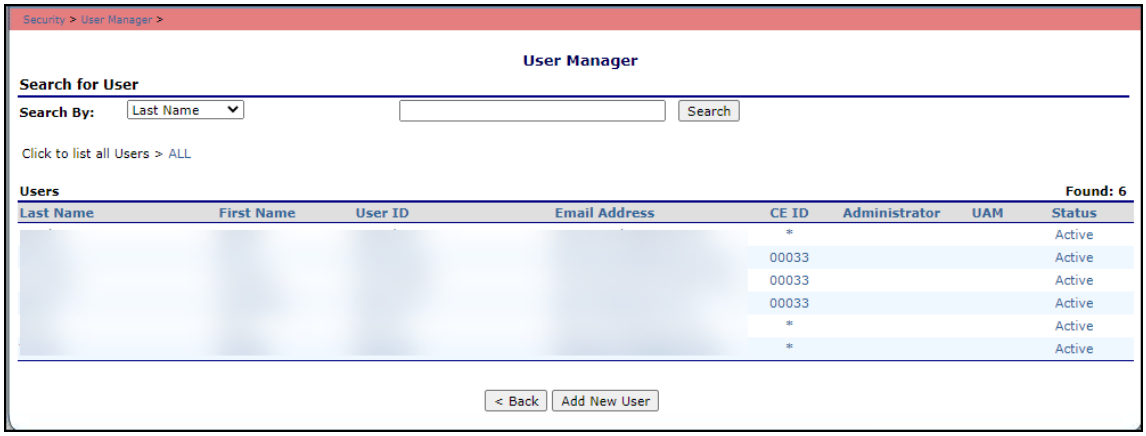

Figure 117: User Manager Search Results Screen

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8.2.2 Adding a New User

If a user has already been selected or is elsewhere in the application, return to the User Manager screen.

1. From the User Manager screen, select the **Add New User** button. The User's Profile screen displays.
2. Enter the **new user's information** in the User Information section. The First Name, Last Name, and Title are required.
3. Enter the **new user's login name** and **temporary password.** Enter **the temporary password** again for confirmation. This information is required. The system will prompt the user to change the temporary password upon initial login.
4. Use the **buttons** to select if the user is a: a) state employee, b) security administrator, and c) granted access to associated Organizations.

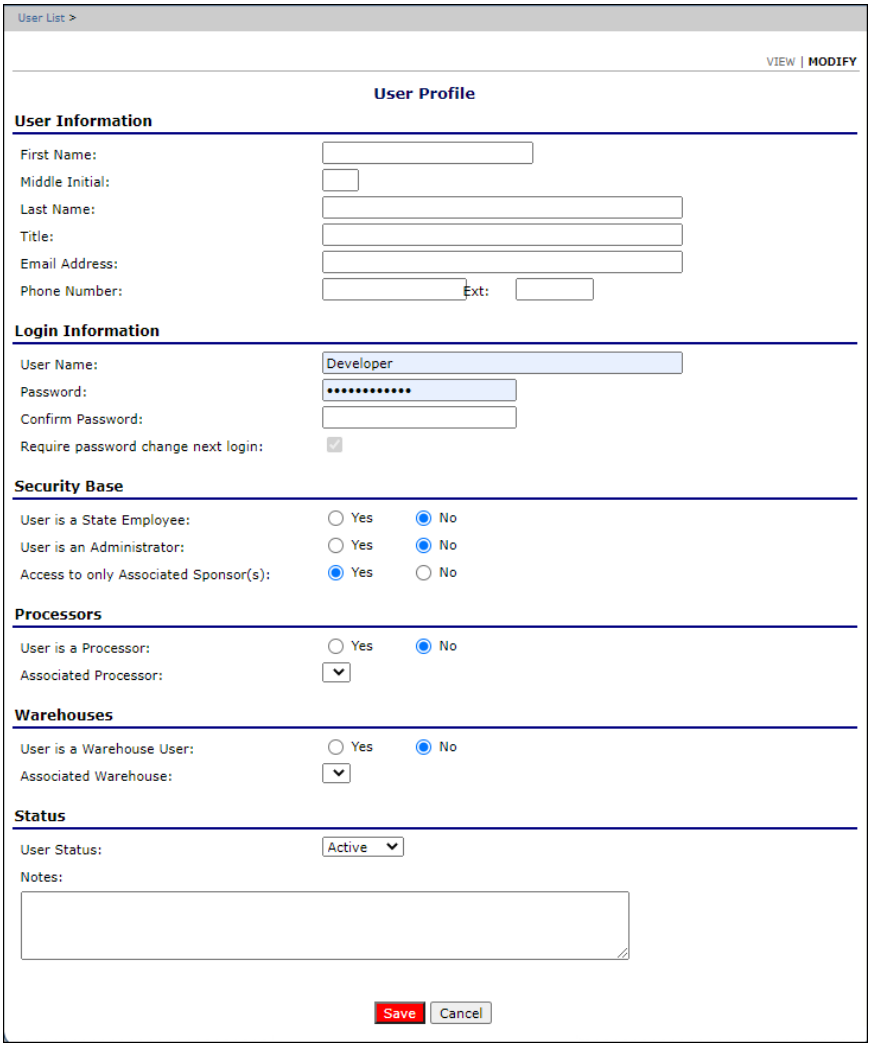

Figure 119: User Profile Screen

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Please Note: If the "Access to only Associated Organizations" button is marked "Yes", the user will only be able to view information for the Institution(s) to whom they are associated.

5. Use the drop-down menu to select the **user's status**. The default is "Active".
6. Select **Save.**
7. Select **<Edit** to return to the User's Profile screen or select **Finish** to return to the User Options menu.

Please Note: After creating a new user, it is recommended that a user is immediately assigned to a security group. Until the user is linked to a security group, security rights will not be available to access any system functions.

The User's Profile enables authorized administrators 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:

a) State employee,
b) Security administrator
c) Granted access to associated Institutions. 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.

Please Note: Passwords cannot be changed within the user's profile. This function is accessed through the User Manager.

8.2.3 User Options

1. After choosing a user, select **User Manager.**

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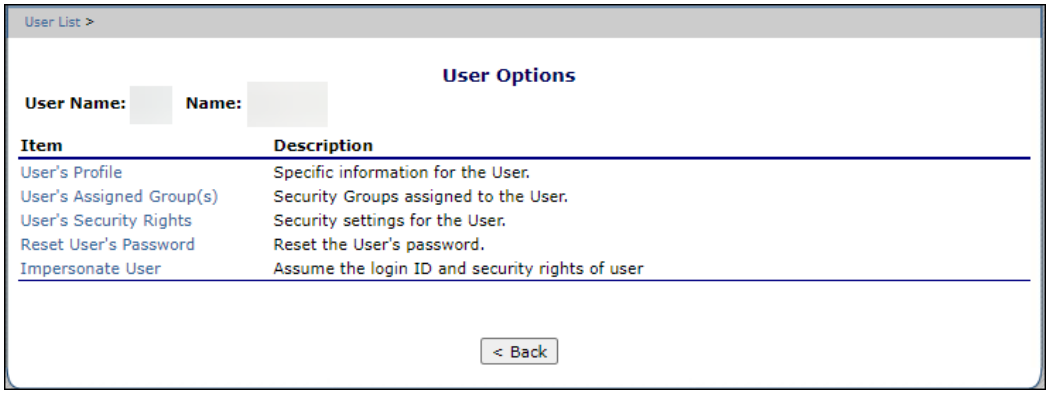

Figure 120: User Options Menu Screen

Please Note: The menu options displayed on the User Options menu depends on whether the user can access all Agencies (i.e., a State user) or if the user is an Agency user.

8.2.4 Accessing a User's Profile

1. Select **User Manager**. The Search for User screen displays.
2. On the **Search By** drop-down list, select the type of search and then select **Search** or select **All** to display a list of all users. A list of users matching the search criteria displays.
3. Select a **user** to access. The User Options menu displays.
4. Select **User's Profile**. The User's Profile screen displays.

8.2.5 Deleting a User's Profile

1. Access a **User's Profile** to delete through the User Manager.
2. On the Edit menu, select **Delete**. A warning displays at the bottom of the page.
3. Select **Delete**. A confirmation screen displays.
4. Select **Save** to return to the User Options menu.

WARNING: It is HIGHLY recommended that User Profiles are NOT deleted since data updates have most likely meet "stamped" with the user information. Instead, set the User Profile **Status to Inactive**.

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8.3 User's Assigned Group(s)

The User's Assigned Group(s) feature streamlines security setting controls by enabling you to assign users to numerous pre-defined security groups. Users assigned to a specific security group automatically inherit the security rights defined for the group, eliminating the need to manually set each user's security access.

Any changes to a group's security rights settings will affect any users associated with the security group. In order for existing users to experience security rights setting changes, the user must re-login to the system. Users cannot modify their own assigned groups.

Please Note: Once a user is assigned to a group, the User inherits the rights defined for the security at the point in time the association is made. To customize a user's rights, see User's Security Rights.

8.3.1 Accessing a User Assigned Group(s)

1. Select **User Manager**. The Search for User screen displays.
2. On the Search By drop-down list, select the **type of search** and then select **Search** or select **All** to display a list of all users. A list of users matching the search criteria displays.
3. Select a **user** to access. The User Options menu displays.
4. Select **User's Assigned Group(s)**. The User's Assigned Group(s) screen displays.

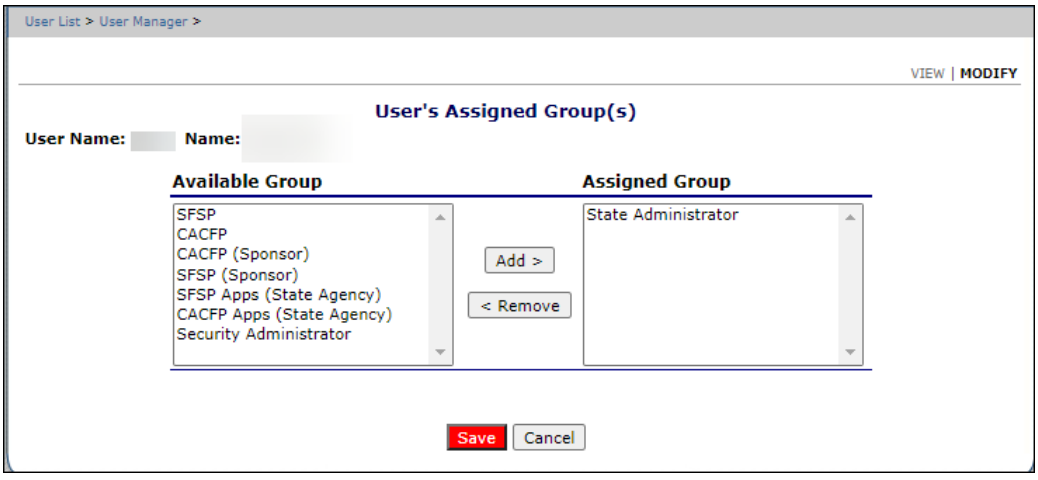

Figure 121: User Assigned Group(s)

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8.3.2 Assigning a User to a Defined Security Group(s)

1. Select **User Manager**. The Search for User screen displays.
2. On the Search By drop-down list, select the **type of search** and then select **Search** or select **All** to display a list of all users. A list of users matching the search criteria displays.
3. Select a **user to access.** The User Options menu displays.
4. Select **User's Assigned Group(s)**. The User's Assigned Group(s) screen displays.
5. Select the group you want to add the user to from the **Available Group** list.
6. Select **Add>**. A message box appears and reads "Select 'Save' to Apply the Changes"
7. Select **OK** on the Message box.
8. Select **Save.**
9. Select **<Edit** to return to the previous screen or select **Finish** to return to the User Options menu.

8.3.3 Removing a User from Assigned Group(s)

1. On the blue menu toolbar, 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** 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 a **user** 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** to remove the user from on the Assigned Group list.
7. Select **<Remove**. A message box appears and reads "Select 'Save' to Apply the Changes"
8. Select **OK** on the Message box.
9. Select **Save**.
10. Select **<Edit** to return to the User's Assigned Group(s) screen or select **Finish** to return to the User Options menu.

8.4 User's Security Rights

When a user is assigned to a security group, the group's 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, State Administrators may deny a user's specific rights.

The User Security Rights feature enables State Administrators to customize security rights automatically assigned to an individual user based upon the security group(s) to which they are associated. Security rights determine the functions and actions within the system's programs and modules the user is granted access.

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8.4.1 Viewing or Modifying User Security Rights

1. On the blue menu toolbar, 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 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 a **user.** The User Options menu displays.
5. Click the **User's Security Rights link.**
6. Select the applicable **Program** by clicking on the blue Program Name link. The Security Links screen displays.
7. Click the **applicable radio buttons** to allow or deny specific security rights.
8. Select **Save.**
9. Select **<Edit** to return to the User Security Rights screen or select **Finish** to return to the User Options menu.

Please Note: The security rights available to a user depend on the User's Assigned Group(s). Only the security rights assigned to the User's Assigned Group(s) display in the user's security rights.

To assign additional security rights to a user that are not displayed as options in the user's security rights, the user will need to be assigned to the security group with the desired rights and then customize the user's security rights.

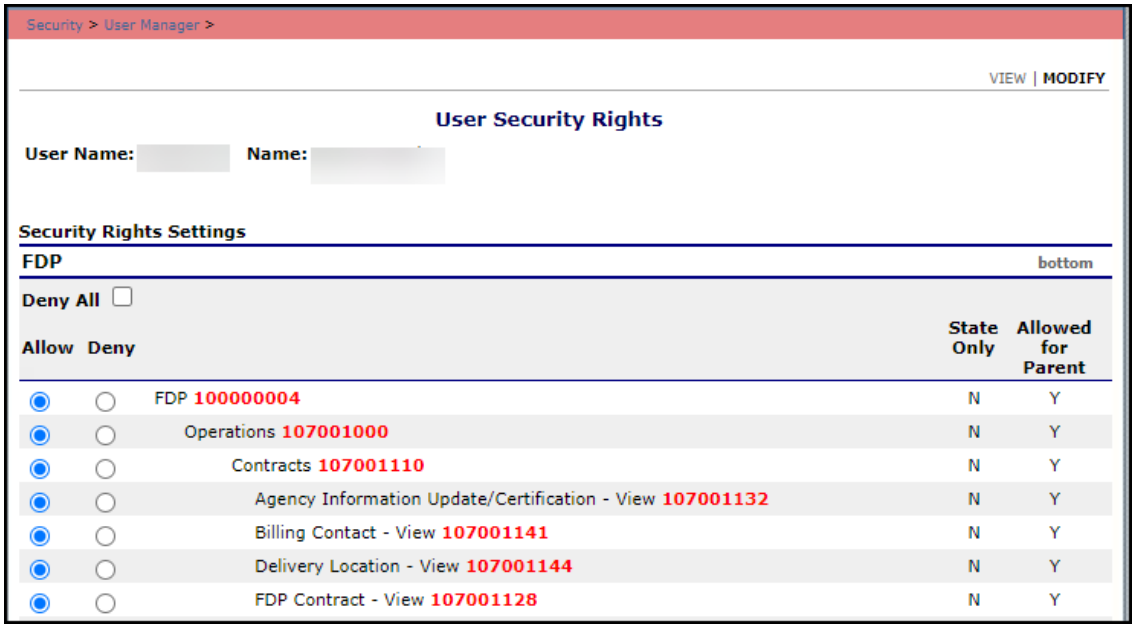

Figure 122: User Security Rights Settings (Partial Screen)

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8.5 User's Associated Contracting Entities

This feature allows for associated contracting entities to be added or removed from the program.

8.5.1 Adding a CE

1. On the blue menu toolbar, 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 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 a **user.** The User's Associated Contracting Entities screen displays..
5. Enter a **CE ID** or a **CE Name**, select **Search** or select the **ALL link** to display a full list of CEs.

Figure 123: User's Associated Contracting Entities

6. Select a **user.** The User Options menu displays.
7. Select **User's Associated Contracting Entities.**
8. Select the **Add CEs button** located at the bottom of the screen.

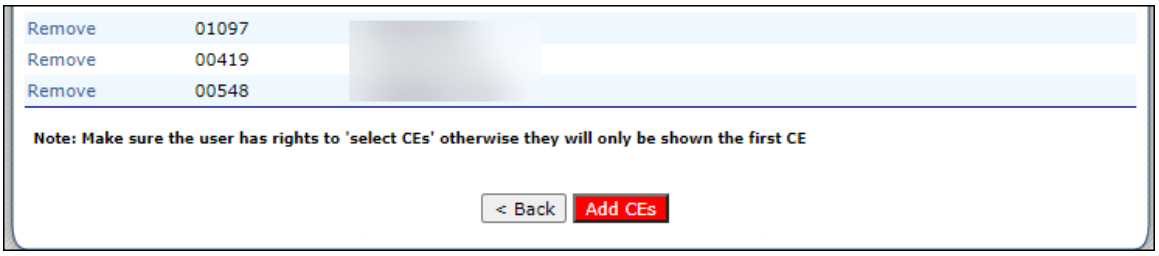

Figure 124: Add CEs Button Option

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7. Click on the **Add Association link** under the Actions column next to the corresponding CE name.

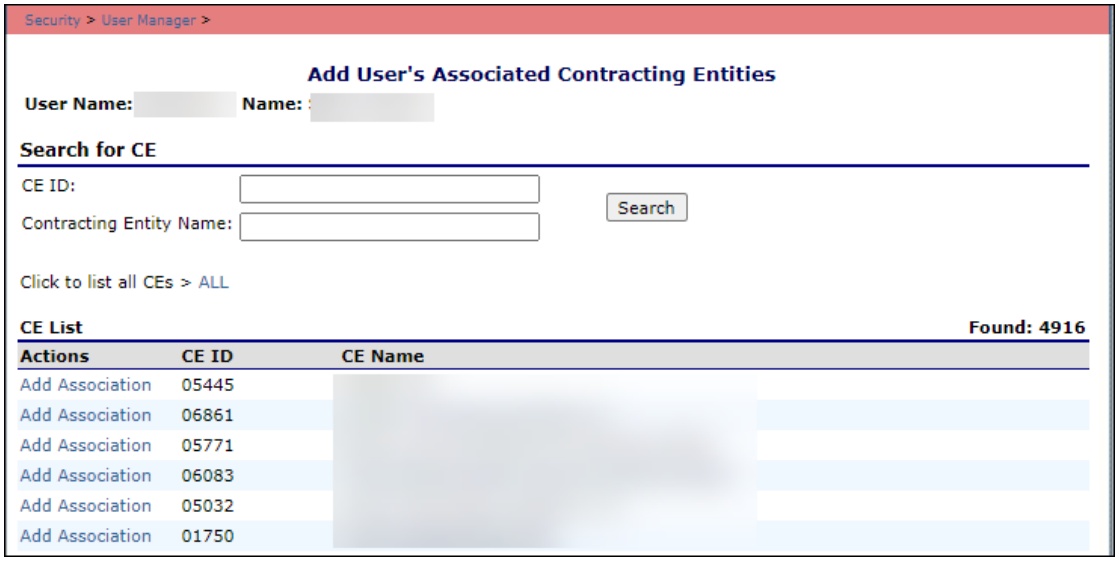

Figure 125: Add CEs Screen

8. A confirmation displays, select **Finish** to return to the Add CE list screen.

Figure 126: Confirmation Screen

8.5.2 Removing a CE

1. On the blue menu toolbar, 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 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 a **user.** The User's Associated Contracting Entities screen displays..
5. Enter a **CE ID** or a **CE Name**, select **Search** or select the **ALL link** to display a full list of CEs.

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6. Select **Remove** located under the Actions column next to the corresponding CE name. A confirmation screen displays.

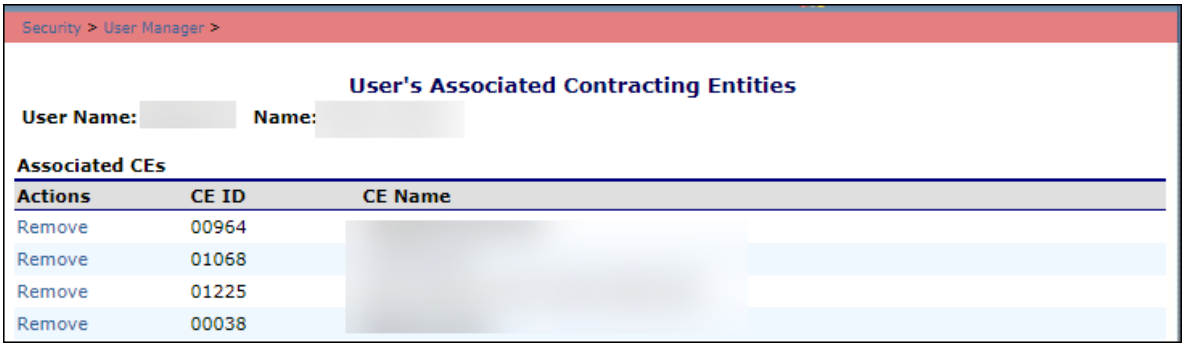

Figure 127: User's Associated CE Removal Screen

8.6 Reset User's Password

The Reset User's Password enables authorized security administrators to reset a user's password required to login to the system.

Please Note: Passwords can be reset for users who have forgotten their passwords. If a user attempts to log in with an incorrect password, a login error will display. Only five (5) unsuccessful login attempts are permitted before the user is temporarily locked out of the system.

The number of unsuccessful login attempts can be modified through the Maintenance and Configuration > Configuration > User Configuration Settings module.

Passwords are case-sensitive.

8.6.1 Accessing Reset User's Password

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 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 a **user**. The User Options menu displays.
5. Select **Reset User's Password**. The Reset User's Password screen displays.

Please Note: The "Require password change next login" checkbox cannot be modified. This feature's purpose is to inform the individual that the user will need to change their password upon their next login.

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8.6.2 Resetting a User's Password

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 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 a **user**. The User Options menu displays.
5. Select **Reset User's Password.**
6. Enter the **New Password.**
7. Re-enter the **temporary password** in the Confirm the New Password field.
8. Select **Save.**
9. Select **<Edit** to return to the Reset User's Password screen or select **Finish** to return to the User Options menu.

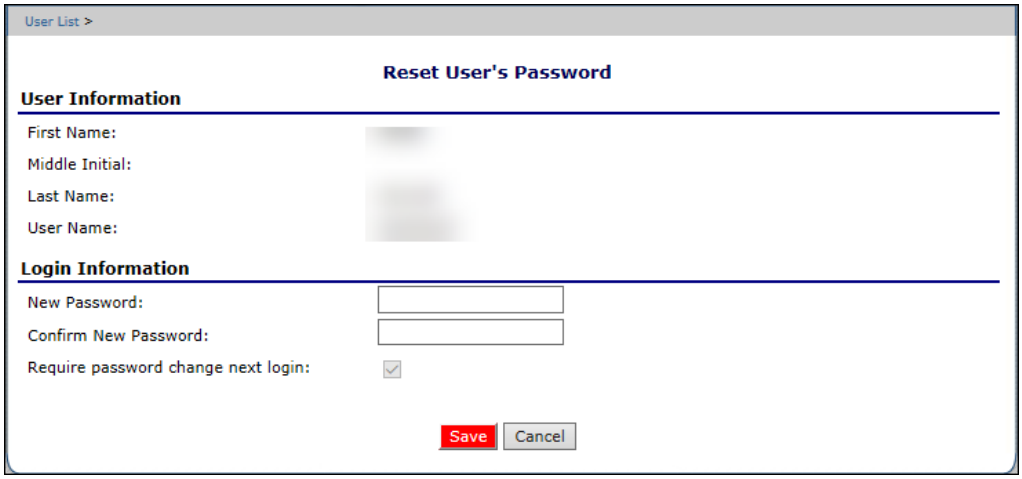

Figure 128: Reset Password Screen

8.7 Impersonate User

This feature allows State administrators to assume the login ID and security rights of a user.

8.7.1 Impersonating a User

1. Select **User Manager**. The Search for User screen displays.
2. On the **Search By drop-down list**, select the type of search and then select **Search** or select **All** to display a list of all users. A list of users matching the search criteria displays.
3. Select a **user**. The User Options menu displays.

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4. Select **Impersonating User.** The User Impersonation screen displays.
5. Select the **Impersonate this User button.** The system will revert back to the main program module page so the User can navigate through the program.

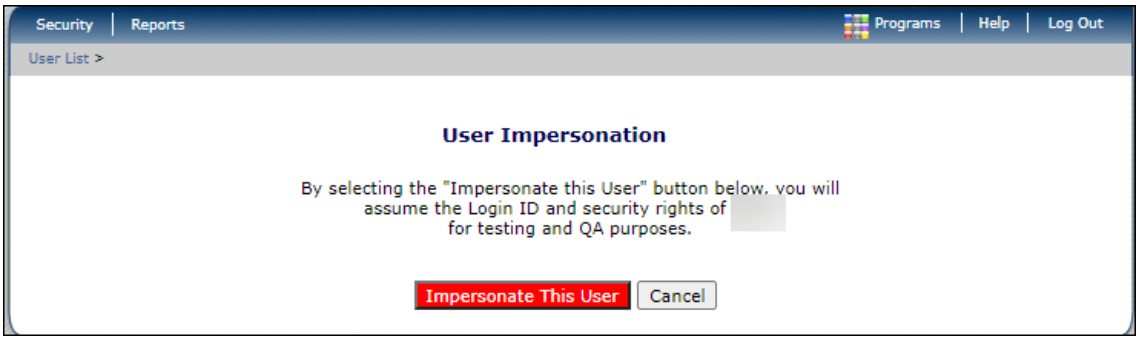

Figure 129: User Impersonation Screen

8.8 CE Systems Login

1. From the Security Menu, select **CE System Logins** to access the List screen. All users associated with the Sponsor are displayed.

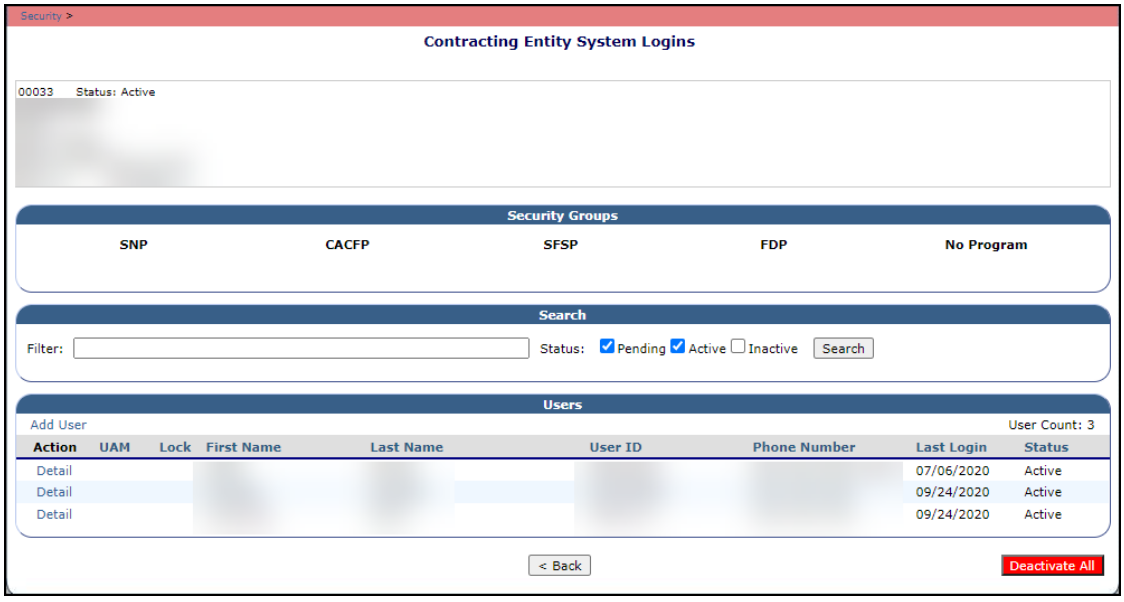

Figure 130: System Login Screen

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Please Note: Only Admin or State users can see the Detail links.

The key symbol located in the Admin column identifies the system administrators. An administrator is determined by the State via the User Profile under the Security module.

The lock symbol indicates a user that has been locked out of the system.

8.8.1 Adding a New User

1. Select **Security** from the blue menu toolbar.
2. Select the **Systems Logins link.**
3. From the Detail screen, click the **Add User link.**

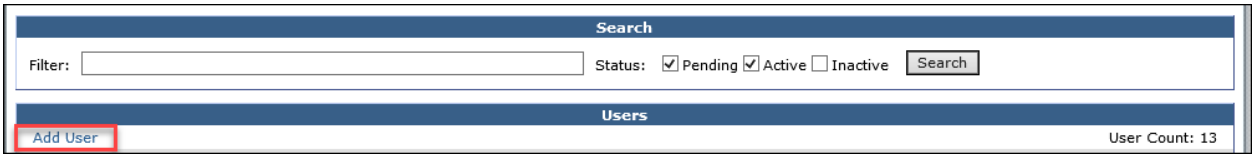

Figure 131: Add User Link

4. The User Profile pop-up screen displays. Complete all required **text fields.**
5. Select **Save**.

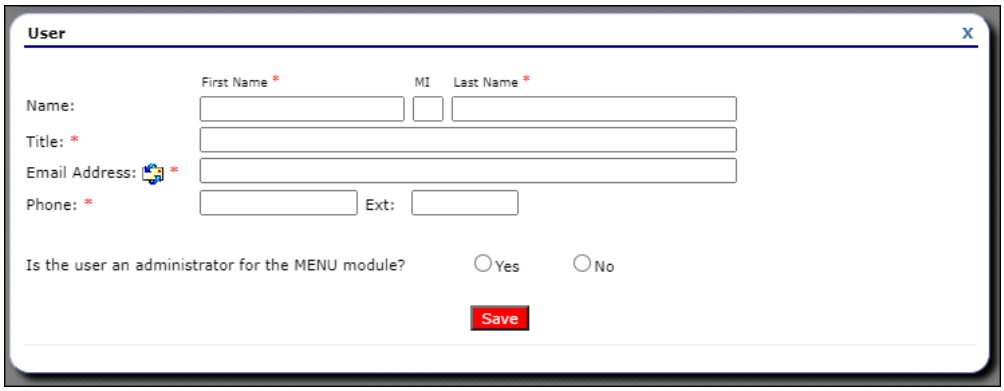

Figure 132: User Profile Screen

Please Note: For new users, once the User ID has been saved, the user is automatically activated and an email is sent allowing the user to reset their password.

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8.8.2 Selecting Security Groups

1. After completing the User Profile screen and selecting **Save**, the Security Groups section displays.
2. Verify the **list of security groups** is correct.
3. Check all the applicable **security groups** that the user will have access to.
4. Select **Save.**

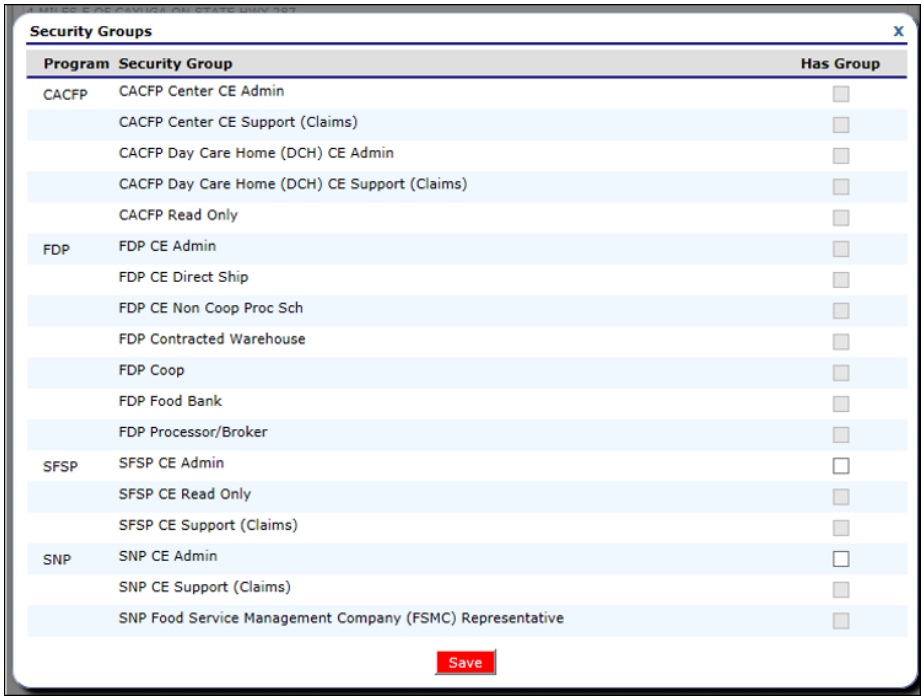

Figure 133: Security Groups List Screen

5. Once the appropriate security groups have been selected, a **User ID** can be generated or assigned.

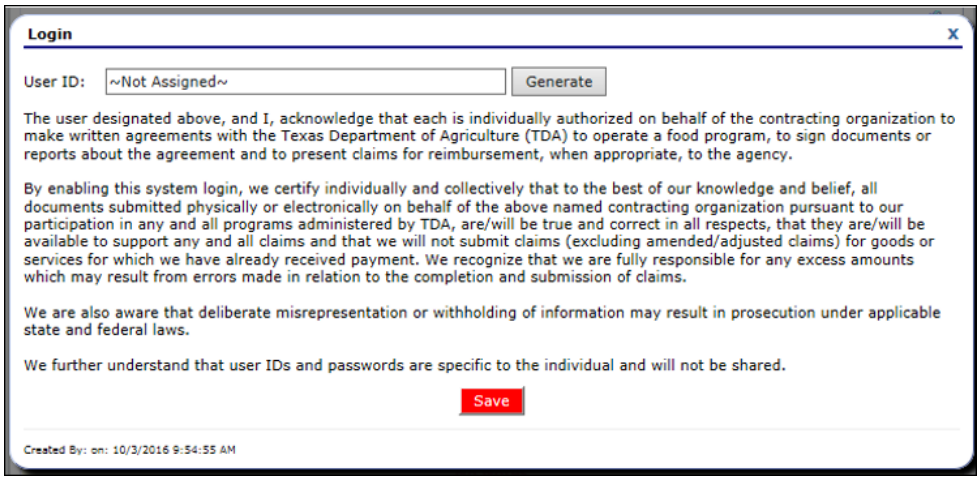

Figure 134: User ID Screen

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8.9 Making Modifications to Existing Users

The Detail screen is mostly read-only to users. Information can be edited by selecting the Edit icon in the section. A separate Edit icon is provided for each section: User, Security Groups, and User Login.

8.9.1 Modifying an Existing User

1. Select **Security** from the blue menu toolbar.
2. Select the **Systems Logins link.**
3. From the System Logins screen, select **Detail** next to username.
4. From the User Detail screen, click the **Edit button** in the upper-right corner of the section to modify (User, Security Groups, or User Login).
5. Make any necessary **modifications** on the pop-up screen. The pop-up screens are the same as when adding a new user.
6. Select **Save.**

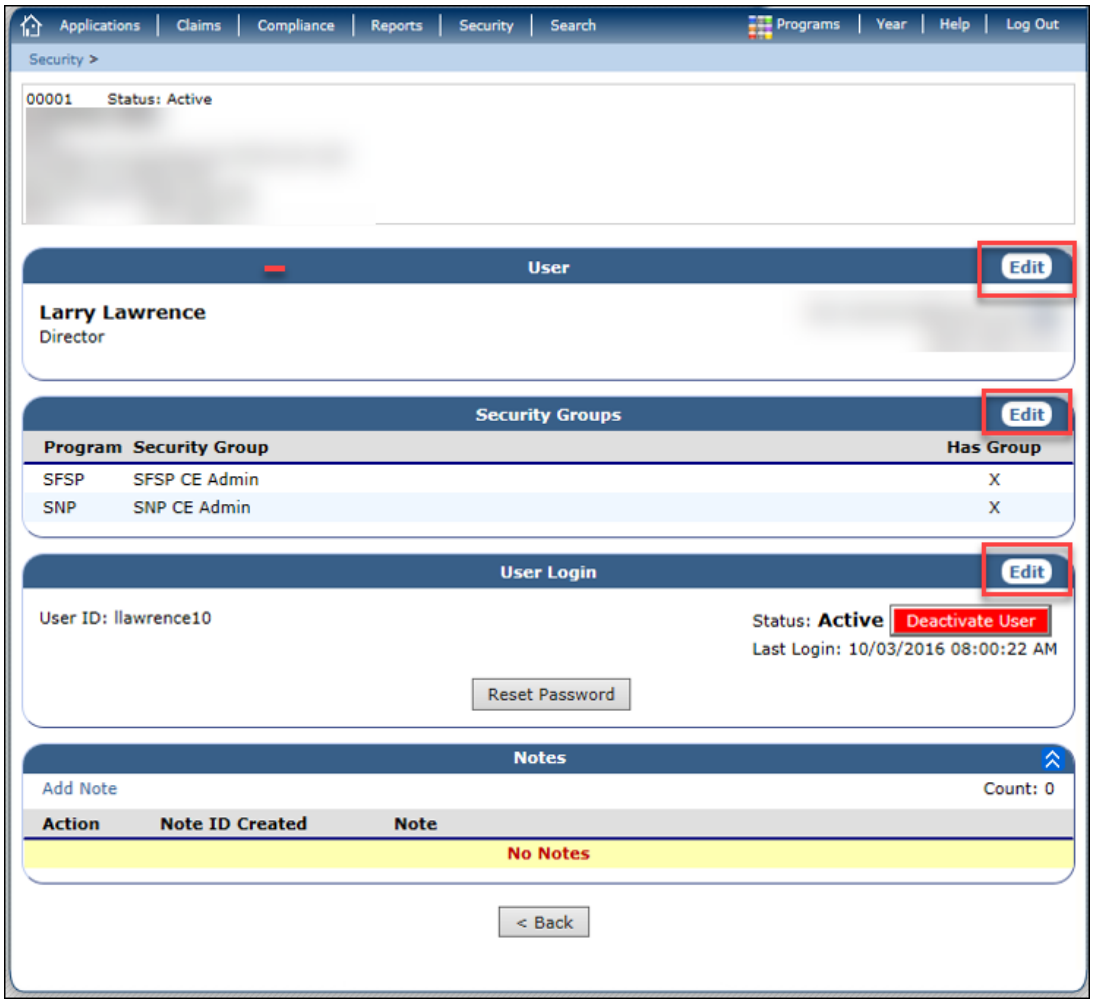

Figure 135: User Detail Screen

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8.10 Action Buttons

The User Login section of the Detail screen contains administrative action buttons that control the status of the account.

8.10.1 Deactivating a User

This button displays when the user account is active. After selecting the **Deactivate User button**, the Activate User button displays.

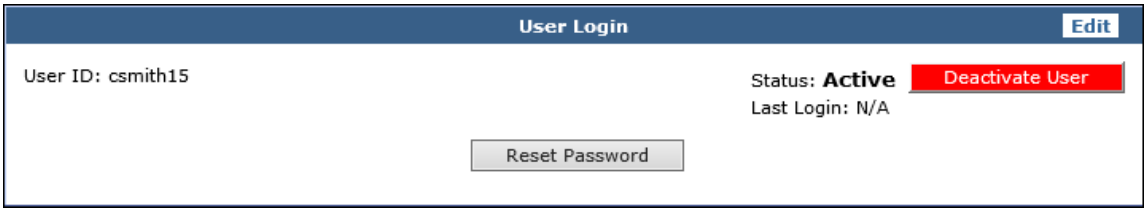

Figure 136: User Login Deactivation Option

8.10.2 Activating a User

This button displays when the user account is not active. After selecting the **Activate User button,** the Deactivate User button displays.

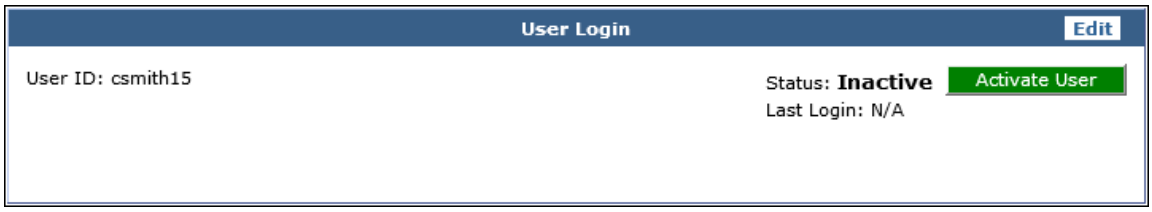

Figure 137: User Login Activation Option

8.10.3 Unlocking a User

Locked users are identified on the List screen by a Lock symbol in the corresponding column.

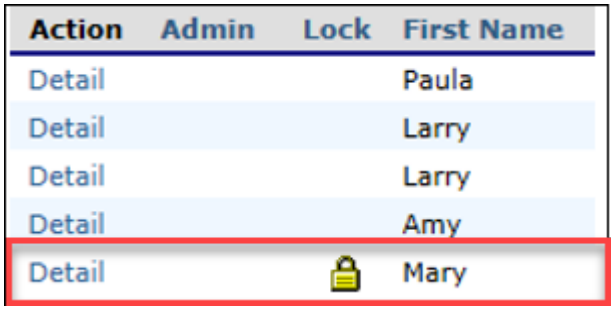

Figure 138: User Login Locked Users Example

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Figure 139: User Login Unlock User Option

Please Note: The Unlock User button displays when the account is locked, after selecting the button to unlock the user account, the button will be hidden.

8.10.4 Resetting a Password

The Reset Password button displays when the user account is active or for new users. Once this selection is made, an email is sent to the user allowing the password to be reset within the system.

PASSWORD RESET LINK

Food and Nutrition Division

Contracting Entity Name: CAYUGA ISDs
Contracting Entity: 00001

User ID: llawrence11
User Name: Larry Lawrence

Click the link below to set/reset your password.
http://localhost:55098/Texas_Web/Security/UserPasswordSet.aspx?qs=0426C6C617772656E6365313130303030303231363531F9BC2F5FD1229C3F5902E05A867711AAA434DF7B12323CE5191AD25

If you did not request a change to your password, or if you have an inquiry, please contact the Help Desk.

CONFIDENTIALITY NOTICE: This e-mail communication constitutes electronic communications within the scope of the Electronic Communications Privacy Act, 18 U.S.C. § 2510 et seq. This e-mail communication may contain non-public, confidential or legally privileged information intended for the sole use of the designated recipient(s). The unauthorized and intentional interception, use, copy or disclosure of such information, or attempt to do so, is strictly prohibited and may be unlawful under applicable laws. 18 U.S.C. § 2511. If you have received this e-mail communication in error, please immediately notify the sender by return e-mail and delete the original e-mail from your system.

Figure 140: Password Reset Email Example

Clicking on the link transfers the user to a new screen to reset the password. No password is necessary for this action.

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8.10.5 Setting a Password

As the password is typed and confirmed, the green edit checks will display positive feedback once each specified condition is met. Once the new password is saved, the user is redirected to the login screen.

Figure 141: Set Password Screen

8.11 Notes

The Notes section allows users to read and add notes regarding an account. This enables users to efficiently communicate and log information pertaining to a user.

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

8.11.1 Creating a Note

1. On the blue menu toolbar, select **Security.**
2. Select the **Systems Logins link.**
3. From the System Logins screen, select **Detail** next to user name.
4. In the Notes section of the User Detail screen, select **Add Note.**

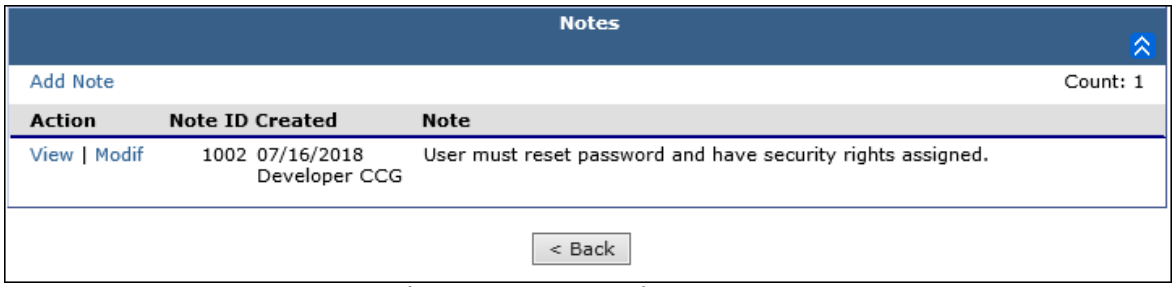

Figure 142: Notes Section

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5. Enter the **Note**.
6. Select **Save**. The note will be added immediately to the Notes section.

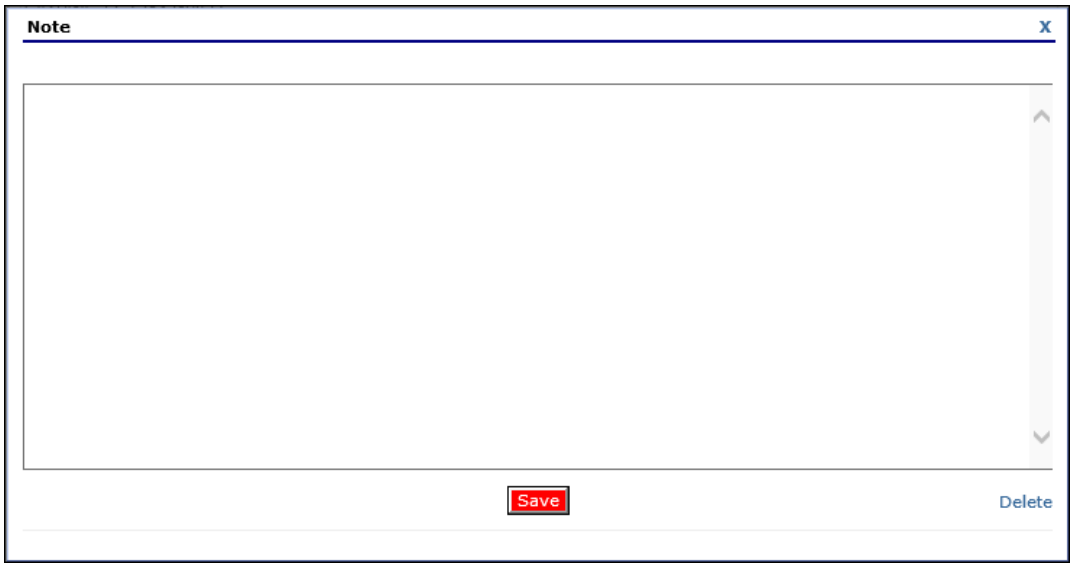

Figure 143: Adding a Note

8.11.2 Viewing or Modifying a Note

1. On the blue menu toolbar, select **Security.**
2. Select the **Systems Logins link.**
3. From the System Logins screen, select **Detail** next to user name.
4. In the Notes section of the User Detail screen, select **View** or **Modify.**

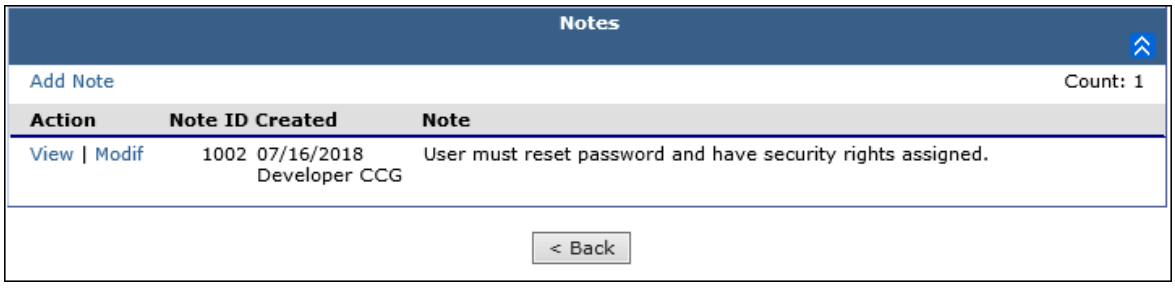

Figure 144: Notes List Section

5. Make any necessary **modifications.**
6. Select **Save.**

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8.11.3 Deleting a Note

1. On the blue menu toolbar, select **Security.**
2. Select the **Systems Logins link.**
3. From the System Logins screen, select **Detail** next to username.
4. In the Notes section of the User Detail screen, select **Modify.**

Figure 145: Notes Delete Option

5. Select **Delete.** A pop-up warning confirmation displays.
6. Select **Delete.** The note will be immediately removed from the list.

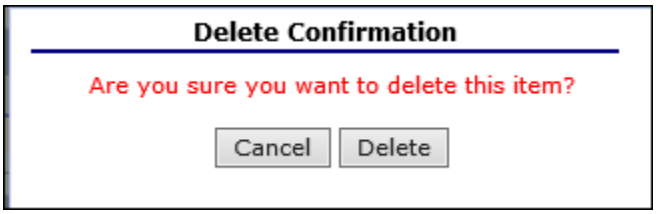

Figure 146: Delete Confirmation Pop-Up Screen

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9.0 Application Packet Process

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

9.1 Submitting a SFSP Application Packet

All new enrollment or renewal enrollment applications are initially created with a status of “Pending Validation”. Once the Application has been saved, the systems validates the business rules and the application’s status is set by the system to either “Error” (if any errors exist) or “Not Submitted” (no errors, but the Application Packet has not been submitted).

Only complete Application Packets that have no errors can be submitted to the State. To submit a completed Application Packet, the Contracting Entity 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 Contracting Entity.

Once the Contracting Entity 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 Contracting Entity for correction.

If the Application Packet is denied or returned to the Contracting Entity 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.

9.2 Reviewing a SFSP Application Packet

Once a Contracting Entity’s Application Packet has been submitted, it must be reviewed by an authorized State user. The State must review each item included in the Application Packet and set each item’s status to “Approved”. This includes each checklist item.

To identify which Application Packets have been submitted, State users can use the Contracting Entity Search screen by performing a search where Packet Status is “Submitted for Approval.

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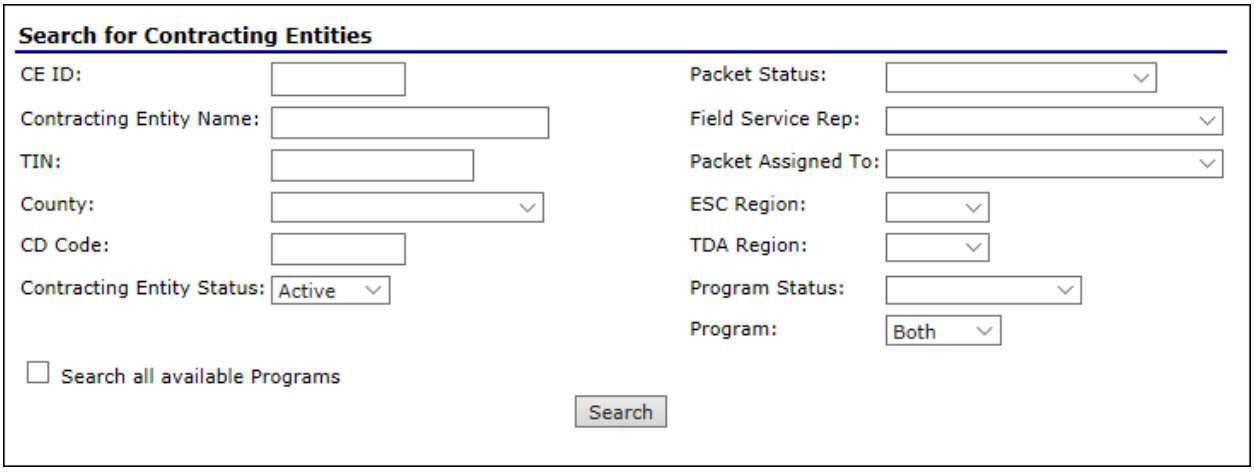

Figure 147: Search for Contracting Entities

After locating a submitted Application Packet via the Search screen, the State user should follow the following steps:

1. Assign the Application Packet to a State consultant (this may be yourself). For additional information, see the ***Assign an Application Packet*** section.
2. Review each submitted site/provider application.
    - Select the Admin option next to the site application item.
    - Review the application.
    - Update the Internal Use Only section of each site application.
    - Enter Internal Comments and Comments to Contracting Entity, if desired.
    - Update the application status.
        - If the application has no issues, change the status to “Approved”.
            - Returning to the Site List screen, you will notice that the application status is “Approved” and there is a green checkmark next to the packet item.
        - If the application requires additional information or corrections from the Contracting Entity, change the status to “Returned for Correction”.
            - Ensure that you have provided information as to what needs to be corrected within the Comments to Contracting Entity field.
            - Returning to the Site List screen, you will notice that the application status is “Returned for Correction”.
        - If the application is not valid for submission, change the status to “Denied”.
            - Ensure that you have provided information as to the reason for denial within the Comments to Contracting Entity field.
            - Returning to the Site List screen, you will notice that the application status is “Denied”.
        - If the Contracting Entity has requested to withdraw the application, change the status to “Withdrawn”.

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- Ensure that you have entered information as to the reason for the withdrawal within the Comments to Contracting Entity field.
- Returning to the Site List screen, you will notice that the application status is “Withdrawn”.

3. Review the Contracting Entity Application.
    - Select the Admin option next to the Contracting Entity Application item.
    - Review the application.
    - Update the Internal Use Only section of the application.
    - Enter Internal Comments, if desired.
    - Update the application status.
        - If the application has no issues, change the status to “Approved”.
            - Returning to the Application Packet screen, you will notice that the application status is “Approved” and there is a green checkmark next to the packet item.
        - If the application requires additional information or corrections from the Contracting Entity, change the status to “Returned for Correction”.
            - Ensure that you have provided information as to what needs to be corrected within the Comments to Contracting Entity field.
            - Returning to the Application Packet screen, you will notice that the application status is “Returned for Correction”.
        - If the application is not valid for submission, change the status to “Denied”.
            - Ensure that you have provided information as to the reason for denial within the Comments to Contracting Entity field.
            - Returning to the Application Packet screen, you will notice that the application status is “Denied”.
        - If the Contracting Entity has requested to withdraw the application, change the status to “Withdrawn”.
            - Ensure that you have entered information as to the reason for the withdrawal within the Comments to Contracting Entity field.
            - Returning to the Application Packet screen, you will notice that the application status is “Withdrawn”.
4. Review the submitted Board of Directors, if applicable.
5. Review the submitted Budget Detail.
6. Review the Checklist items (if applicable).
    - Select the Details option next to Checklist Summary. The Checklist Summary is displayed.
    - Select each checklist item for the Contracting Entity and each site.
    - Select **INTERNAL USE ONLY** from the top right of the screen.

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- For each checklist item received and reviewed, identify that the items were received and change the status to “Approved”.
    - Returning to the Application Packet screen, you will notice that there is a green checkmark next to the Checklist Summary packet item.

Please Note: If the Contracting Entity organization submits a Revised Application, which occurs when a Contracting Entity makes any changes to an Application Packet that has already been approved, the original packet’s status automatically changes to **Not Submitted.** The State is required to perform all of the steps identified above for the revised items in the Application Packet.

7. Return to the Applications menu, access the Advance Requests Manager to determine if the Contracting Entity has submitted an advance request.
    - If an advance request has been submitted, ensure that a Budget has been submitted with the Application Packet and has been approved.
    - Review and approve the Advance Request.

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