

COLYAR CONSULTING GROUP, INC.

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CRRS .NET Software

# Summer Food Service Program User Manual

**FINAL V1.0**

*For Sponsor Users*

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# 1

## Introduction

*Welcome to the Ohio Department of Education (ODE) Claims Reimbursement and Reporting System (CRRS .NET) user manual for the Summer Food Service Program module. CRRS .NET is a web-based software solution that provides administrators, state users, and Sponsors with efficient and immediate access to applications, claims, and related nutrition program functions.*

## Web Site Benefits and Features

CRRS .NET is a user-friendly web application that allows authorized users to submit and approve application, claims, and miscellaneous forms via the Internet, as their security rights permit. Key system features include:

- A software system that manages information regarding Sponsors, applications, claims, and reports.
- A single integrated database which serves all child nutrition programs.
- The ability to save partially completed forms on-line, allowing the user to complete the process at a later time.
- Individual User IDs and passwords for secure login to program functions and accurate tracking of user behavior.
- A robust security module that streamlines security setting controls by enabling administrators to easily assign users to numerous pre-defined groups and eliminating the need to manually set each user's security access.

## User Manual

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

- A general explanation of each feature available.
- Screen examples of web site pages and forms.

- Step-by-step instructions for utilizing the web site features.
- Tips and notes to enhance your understanding of the system.

# 2

## Getting Started

Before you can begin using CRRS .NET, you must be assigned a user ID and password by the CRRS .NET Help Desk that provides the required security rights. Once this setup is complete, you may use the Internet and your assigned user ID and password to access and log onto the CRRS .NET web site.

## Accessing the Web Site

You can access CRRS .NET from any computer connected to the Internet by opening your Internet browser and entering the CRRS .NET URL in the browser's address line. The CRRS .NET URL for the production environment is: <https://oh.cnpus.com/crrs/splash.aspx>



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

Claims Reimbursement and Reporting System  
CRRS

Ohio Department of Education

Returning Users: Log On

User ID:  
Password:

Log On

Welcome to the Updated CRRS software!

**Password Requirements**

- A User's Password MUST follow these rules:
  - 8 to 12 characters in length
  - Must contain a numeric character
  - Must contain a special character (e.g., #, \$, &)
  - Must contain an uppercase letter
  - Must NOT be the same as the User ID

**Non-Discrimination Statement**

- The U.S. Department of Agriculture prohibits discrimination against its customers, employees, and applicants for employment on the basis of race, color, national origin, age, disability, sex, gender identity, religion, reprisal, and where applicable, political beliefs, marital status, familial or parental status, sexual orientation, or all part of an individual's income is derived from any public assistance program, or protected genetic information in employment or in any program or activity conducted or funded by the Department. (Not all prohibited bases will apply to all programs and/or employment activities.)

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Figure 1: CRRS .NET Home Page



## **About the CRRS .NET Home Page**

The CRRS .NET Home Page consists of three major sections:

- Bulletin Board.
- Log on.
- Links.

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

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

The links section provides access to websites and additional information.

# Logging On

## To log on

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1. Access CRRS .NET by typing the URL into the address line of your web browser.
2. Enter your assigned **User ID**.
3. Enter your **Password**.
4. Select **Log On**.

**Note:** If you do not have a User ID and Password, contact the CRRS .NET Help Desk.



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

## To change your password

---

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

1. Select a new password and enter it into the box provided.
2. Re-enter your new password for confirmation.
3. Select **Save** to continue to the CRRS .NET Programs page.

**Note:** Security configuration settings require a password eight (8) to twelve (12) characters in length. Please note that the password must be at least eight (8) characters in length.

The password must contain at least one number, one uppercase letter, and one special character (e.g., #, \$, &). Passwords are case sensitive.

## CRRS .NET Content Overview

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



Figure 2: CRRS .NET Content Overview

Item	Description
<b>Program Name</b>	The selected program name appears in the gray area at the top of the page.
<b>Menu Items</b>	Menu items display on the blue menu bar at the top of the page. Selecting a menu item will take you to its menu page.  Users may not have access to all menu items. If you are unable to select a particular menu item, you do not have the necessary security rights. Contact the CRRS .NET Help Desk for assistance.

Item	Description
<b>Breadcrumb Trail</b>	The navigation, or breadcrumb trail, identifies your location within the web site. Selecting a specific portion of the trail will take you back to that particular screen.
<b>Program Year</b>	The selected Program Year displays on the right beneath the menu bar. Upon logging in, the system defaults to the most current active Program Year.
<b>Information Box</b>	The information box displays general information regarding the Sponsor and Site, where applicable. The address information is displayed from the most current version of the respective Sponsor/Site application.
<b>Logout</b>	The logout button displays in the menu bar. It is recommended to select <b>Logout</b> to properly exit the system.

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

## **Screen Options**

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



**Figure 3: Screen Options - example**

The following table describes each of the possible screen options:

<b>Item</b>	<b>Description</b>
<b>VIEW</b>	Presents the screen information in 'view-only' mode. In this mode, the user cannot modify any data.
<b>MODIFY</b>	Presents the screen in 'modify' mode. In this mode, the user can modify field data and save the data after pressing the save button at the bottom of the screen.
<b>DELETE</b>	Deletes the current record displayed on the screen. The user will be presented with a confirmation screen to validate that they intend to delete the record.
<b>INTERNAL USE ONLY</b>	This option is only available to authorized State users only.

## CRRS .NET Programs Page

Once you successfully log on, if you are a Sponsor in multiple programs, the CRRS .NET Programs page is displayed. Actual access to specific modules is based on the user's security rights.

If you are a Sponsor participating in only the Summer Food Service Program, you will be taken directly to the SFSP module.

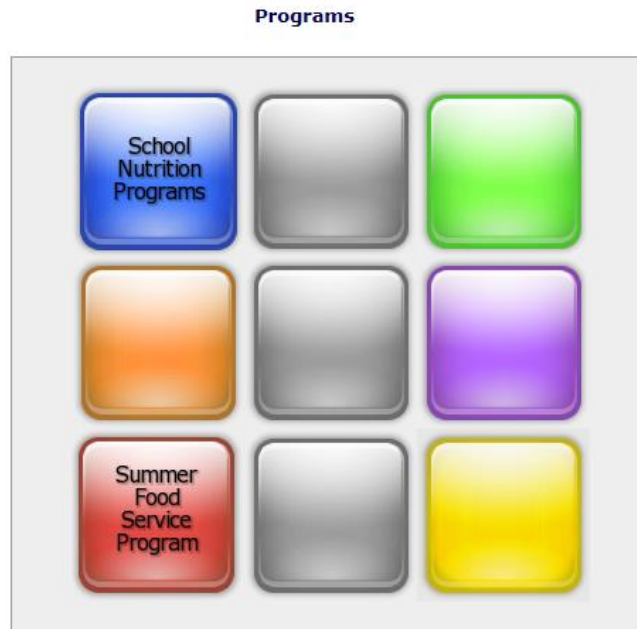


Figure 4: Programs page (if Sponsor participates in more than one Program) - example

# Summer Food Service Program Home Page

The Summer Food Service Program (SFSP) home page contains the message board that is maintained by state administrators to post Summer Food Service Program-related messages to Sponsors. Messages may contain important news regarding submission due dates, upcoming training, legislative changes, or any other SFSP-specific information.

## To access the Summer Food Service Program home page

1. Log on to the CRRS .NET web site.
2. On the Programs screen, select **Summer Food Service Program**.

**Note:** If a user only has access to the Summer Food Service Program module, the Programs screen is not displayed

3. The Summer Food Service Program home page displays.

**Note:** State administrators maintain the message boards for all CRRS .NET modules. Please note that messages are visible to both internal and external users.

## Summer Food Service Program menu options

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

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

Menu Item	Menu Features
<b>Applications</b>	Access to overall application-related items including: <ul style="list-style-type: none"><li>▪ Application Packet (<i>inc. Sponsor and Site applications, as well as supporting submissions</i>).</li><li>▪ Advance Requests.</li><li>▪ Download Forms.</li></ul>
<b>Claims</b>	Access to SFSP claim entry screens and Sponsor-specific payment history.
<b>Security</b>	Access to an individual user's security-related items including: <ul style="list-style-type: none"><li>▪ Change Password (<i>authenticated user changing their password</i>).</li></ul>
<b>Search</b>	Access to the SFSP Sponsor Search screens.



## Error Processing

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

### Input Edits

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

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

The screenshot shows a web form titled "Site Profile". At the top, a red banner contains the text "Input Errors" and a message: "A| Value is required. Please re-enter." Below this banner, the "Site Information" section is visible. It contains three input fields: "Site ID" with the value "200000916", "Site Name" (empty), and "County" (a dropdown menu). Each of these three fields has a red error message "A|" next to it, indicating that they are required and currently empty.

Figure 5: Examples of an Input Error (Partial Screen)

### Business Rule Edits

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

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

Code	Error Description
8200	Facility Information - Food Preparation Type is required.
8205	Facility Information - Facility Name is required.

**Food Production Facility Information**

---

1. Food Preparation Type:

2. Facility Name:

**Figure 6: Example of a Business Rule Error (Partial Screen)**

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

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

**Figure 7: Example of a Warning Error**

**Note:** The system is pre-loaded with business rule error messages. Authorized state administrators maintain the business rule error messages via the Maintenance and Configuration module.

## Selecting a Program Year

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

**Note:** A Sponsor will be unable to select a new year if they have not been granted the security right. Contact the CRRS .NET Help Desk and request access to the **Select Year** security right if you do not see the **Select Year** option.

### To select a program year

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

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

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



**TIP:** The ability to view and/or modify a Program Year is controlled by the State’s system administrator. It is important to note that a Program Year may be set as “view only” to the Sponsors and “modify” to authorized State users.

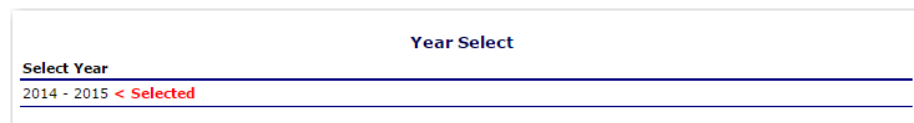


Figure 8: Year Select screen

# Sponsor Search

**Note:** If you are associated with only one Sponsor, CRRS will default to your Sponsor and Site data. You will NOT need to perform a search.

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

## To search for a Sponsor

1. On the menu bar, select **Search**. [If the Sponsor Search screen is already displayed, begin at Step 2.] The Sponsor Search screen displays.
2. Enter search parameters (see table for additional information on using the search parameters).
3. Select **Search**.
4. Select the Sponsor you wish to access.



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

The screenshot shows the 'Search for Sponsors' interface. It features a grid of search criteria fields:

- IRN: [Text Input]
- Sponsor Name: [Text Input]
- FEIN: [Text Input]
- County: [Dropdown Menu]
- Sponsor Status: [Dropdown Menu, set to 'Active']
- Packet Status: [Dropdown Menu]
- Field Service Rep: [Dropdown Menu]
- Packet Assigned To: [Dropdown Menu]
- Region: [Dropdown Menu]
- Program Status: [Dropdown Menu]

At the bottom left, there is a checkbox labeled 'Search all available Programs'. A 'Search' button is located at the bottom center.

Figure 9: Sponsor Search screen

**Note:** Non-state users can only query on and view Sponsors associated with their user account.

The search parameters follow a specific set of rules. These are described in the following table. The search is confined to the Sponsors in the respective Program Year displayed at the top right of the screen.

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

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

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

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

**Search for Sponsors**

---

IRN:

Sponsor Name:

FEIN:

County:

Sponsor Status:

Search all available Programs

Packet Status:

Field Service Rep:

Packet Assigned To:

Region:

Program Status:

---

**Sponsors** **Found: 4228**

IRN	Sponsor Name	NSLP	SFSP	CACFP	FDP	Status
000012	XYZ	✓	✓	✓	✓	Active
000103	City of Moraine Parks & Recreation		✓	✓	✓	Active

Figure 10: Sponsor Search screen – “Search all available Programs” example

## Site Search

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



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

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

### To search for a site

1. On the menu bar, select **Search**.
2. Select **Site Search**.
3. Enter all or a portion of the Site ID, Site Name, Site Type, or Address in the respective text box(es).
4. Select **Search**.
5. Select the desired Site.

The screenshot shows a web form titled "SFSP Site Search". Under the heading "Search for Sites", there are several input fields: "Site ID:", "Site Name:", "Site Type:" (with a dropdown arrow), "Street Address:", "City:", "State:" (with a dropdown arrow), "Zip Code:", and "Site Status:" (with a dropdown arrow showing "Active"). A "Search" button is located at the bottom right of the form.

Figure 11: Site Search Page

<b>Parameter</b>	<b>Type of Search</b>	<b>Search Features</b>
<b>Site ID</b>	“includes”	<ul style="list-style-type: none"> <li>▪ If in combination with the Site Name, the Site ID takes precedence</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>
<b>Site Name</b>	“includes”	<ul style="list-style-type: none"> <li>▪ If in combination with the Site ID, the Site ID takes precedence; this parameter is ignored</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>
<b>Site Type</b>	“exact”	<ul style="list-style-type: none"> <li>▪ If in combination with the Site ID, the Site ID takes precedence; this parameter is ignored</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>
<b>Street Address</b> <b>City</b> <b>State</b> <b>Zip Code</b>	“includes”	<ul style="list-style-type: none"> <li>▪ If in combination with the Site ID, the search is performed using both the Site ID and this parameter</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>
<b>Site Status</b>	“exact”	<ul style="list-style-type: none"> <li>▪ If in combination with any parameter, all parameters are used to perform the search</li> </ul>



# Applications

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

## About the Program Year Enrollment Process

In order to participate in the Summer Food Service Program, Sponsors must submit an Application Packet for the upcoming Program Year to the State for review and approval.

The screenshot shows a web interface titled "2014 - 2015 Application Packet". It contains a table with the following information:

000907	Status: Active	Packet Submitted Date:
<b>Canton Calvary Mission</b>		Packet Approved Date:
DBA:		Packet Original Approval Date:
1345 Gibbs Ave NE		Packet Status: Not Submitted
Canton, OH 44705-1172		
County: Stark		
FEIN:34-1971706		

Below the table, the text reads: "The Sponsor has not started in the current year (2015). Click 'Enroll' to enroll for this year base on your prior year's information." At the bottom, there are two buttons: "Enroll" (highlighted in red) and "Cancel".

Figure 12: Enrolling in a New Program Year

Before beginning the Application Packet, Sponsors must select the **Add** action on the Application Packet screen. The user is then transferred to the SFSP Sponsor application screen. Data designated by the State to rollover from the prior year's final Approved application will pre-populate the Sponsor and Site application forms.

A new Application Packet must be submitted by the Sponsor and approved by the State each program year. Once the Application Packet is approved, and the program year has commenced, monthly claims for reimbursement may be submitted.

## Submitting an Application Packet

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

- A completed Sponsor Application with no errors.
- At least one completed SFSP Site Application with no errors.
- A completed Management Plan with no errors.
- A completed Budget Detail with no errors.
- All items in the Checklist are identified as submitted to the State.



---

**TIP:** Site Field Trip data can be entered ONLY for State-approved sites; hence they are usually not part of the initial Application Packet submission by the Sponsor.

---

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

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

Figure 13: Packet History (sub-section of the Application Packet screen)

# Applications Menu

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

## To access the Applications Menu

---

1. On the blue menu bar, select **Applications**. The Applications Menu displays.
2. Select an application item to access that application function.

The following figure displays the list of Applications menu items for Sponsors.

<b>Item</b>	<b>Description</b>
Application Packet	SFSP Applications Forms (Sponsor and Site)
Advance Requests	Request Sponsor's SFSP Advance(s) for the current year
Download Forms	Forms Available for Downloading

**Figure 14: SFSP Applications Menu screen (State view)**

## **Application Packet**

In order to participate in the Summer Food Service Program (SFSP), Sponsors must submit an Application Packet to the State for review and approval. At the beginning of each program year, Sponsor data is rolled over from the prior year's most recent Approved application packet and must be verified by Sponsors prior to submitting any claims. The Sponsor would update any data that is no longer valid, as well as enter additional data required by the State.

The Application Packet contains the Sponsor application, Site application(s), and other forms required as a part of the packet. After selecting Application Packet from the Applications menu, each required packet item and its status displays. If any packet item requires attention (such as an error within a form or a checklist item needs to be completed), a red arrow displays next to the Application Packet item.

If the Application Packet item has been completed correctly and contains no errors, a **green check** displays next to the Application Packet item. The **Submit for Approval** button is illuminated and available for selection ONLY if all Application Packets items have been successfully completed with no errors.

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

**Note:** Once an Application Packet has been approved, if a Sponsor 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.

### **To access the Application Packet**

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. If necessary, search for and select a Sponsor. The Application Packet screen displays.
3. Select the packet item you want to access.

Packet Assigned To: unassigned			
Action	Form Name	Latest Version	Status
View   Modify   Admin	Sponsor Application	Original	Not Submitted
Add	Budget Detail		
Details	Management Plan		
Details	Food Production Facility List		
Details	Site Field Trip List		
Details	Checklist Summary		
Details	Application Packet Notes		
View	Application Packet Notes for Sponsor		

Site Applications	Approved	Pending	Return for Correction	Denied	Withdrawn/ Closed	Error	Total Applications
Summer Food Service Program	0	0	0	0	0	0	0

Figure 15: Application Packet screen

If the Application Packet is under review by the State, it becomes “read only” to the Sponsor. The Application Packet screen is displayed with the following message to help make the Sponsor aware that they can no longer modify the submitted packet during this time.

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

Figure 16: Application Packet screen – Message

## Order of Form Completion

The Application Packet forms should be completed in the following order:

1. Sponsor Application
2. Management Plan
3. Food Production Facility
4. Site Applications (*uses data from the Food Production Facility to identify facilities used by sites*)
5. Budget (*uses data from the Site Application to determine anticipated reimbursement*)
6. Checklist Summary

## Sponsor Application

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

### To view a Sponsor application (Original)

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
3. Select View next to the **Sponsor Application** packet item. The Sponsor Application for the designated Program Year is displayed.

**Note:** If there are multiple versions of a Sponsor application within the system (i.e., revisions exist), the system defaults to the version with the **most current Application Effective Date** designated by the State.

### To add a Sponsor application (New Sponsor)

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select Add next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.
4. Enter required information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Sponsor Application screen.  
-OR-  
Select **Finish** to return to the Application Packet screen.



---

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

---

## To modify a Sponsor application

---

1. On the blue menu bar, select **Applications**.
  2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
  3. Select **Modify** next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.
  4. Modify any desired information.
  5. Select **Save**. A confirmation screen displays.
  6. Select **<Edit** to return to the Sponsor Application screen.
- OR-
- Select **Finish** to return to the Application Packet screen.



---

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

---

## To delete a Sponsor application

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select **Modify** next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.
4. Select **DELETE** on the Edit menu in the top-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.



---

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

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

---

## To revise a Sponsor application

---

**Note:** Only state-approved applications can be revised. Once a Sponsor revises any item (except the Site Field Trip form) within the Application Packet, the Application Packet must be re-submitted and the state review and approval process starts again.

1. On the blue menu bar, select **Applications**.
  2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
  3. Select **Revise** next to the **Sponsor Application** packet item. The Sponsor Application for the designated Program Year is displayed.
  4. Modify any desired information.
  5. Select **Save**. A confirmation screen displays.
  6. Select **<Edit** to return to the Sponsor Application screen you just modified.
- OR-
- Select **Finish** to return to the Application Packet screen.



---

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

---



## To view a Sponsor application

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select the revision link under the **Latest Version** column. The Sponsor Application History for the designated Program Year is displayed.
4. Select the application version you would like to view.



---

**TIP:** The View option appears in two situations: 1) If the user only has view-access security rights or 2) If the user has modify-access security rights BUT the Application Packet has been submitted to the State and is under State review and therefore cannot be modified.

---

## Site Applications

Sponsors must complete a Site Application for each of their sites. The Site Application screen provides access to the Site's annual application for the 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.

### To access the Sponsor's site list

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.

Action	Site ID / Site Name	Version/Status
<a href="#">View   Modify Admin</a>	50005824 HOPE Station	Rev. 2 / Submitted
<a href="#">View   Modify Admin</a>	200000921 Vicky's School of Music	Rev. 2 / Submitted

[Add Site Application](#)

**Total Sites Enrolled: 2**

Figure 17: Application Packet – SFSP Site List screen

### To add a new site (available to Sponsors)

---

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

**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.

5. If the site you would like to add an application for is listed, select the site. If the site you would like to add an application for is not listed, select **Add New Site**. The 'Quick' Site Profile screen displays.
6. The system automatically defaults the Site ID to the next available Site ID for this Sponsor.



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

7. Enter the Site Name and County.
8. Select **Save**. A blank Site Application for the new site is displayed and ready for data entry.

The screenshot shows a form titled "Site Information" with three input fields: "Site ID" containing the value "0214", "Site Name" which is an empty text box, and "County" which is a dropdown menu.

Figure 18: 'Quick' Site Profile screen

## To view a Site Application

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. Select View next to the site whose application you would like to view. The site's Site Application is displayed.

## To modify a Site Application

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The current year's Application

Packet screen displays.

3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. Select **Modify** next to the site whose application you would like to view. The site's Site Application is displayed.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Site Application screen.  
-OR-  
Select **Finish** to return to the SFSP Site List screen.
8. Repeat **Steps** 4 through 7 for each site that will participate in the program.

## To delete a Site Application

---

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



---

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

---

## To revise a Site Application

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

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

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. Select **Revise** next to the site whose application you would like to delete. The site's Site Application is displayed.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Site Application screen.

-OR-

Select **Finish** to return to the SFSP Site List screen.



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

## Management Plan

Sponsors 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.

### To access the Management Plan

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
1. On the menu, select **Application Packet**. The Application Packet screen displays.
2. Select **View** next to **Management Plan**. The most current Management Plan screen displays.

**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.

### To add a Management Plan

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
  2. On the menu, select **Application Packet**. The Application Packet screen displays.
  3. Select **Add** next to **Management Plan**. A blank Management Plan screen displays.
  4. Complete the form.
  5. Select **Save**. A confirmation screen displays.
  6. Select **<Edit** to return to the Management Plan screen.
- OR-
- Select **Finish** to return to the Application Packet screen.

### To view a Management Plan

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. To view the most current Management Plan, select **View** next to **Management Plan**. The

Management Plan screen displays.

-OR-

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

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

**Figure 19: Management Plan History screen**

4. Select the Management Plan version you would like to view.

## **To modify a Management Plan**

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Modify** next to **Management Plan**. The Management Plan screen displays with the most current, un-submitted Management Plan data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Management Plan screen.

-OR-

Select **Finish** to return to the Application Packet screen.

## To revise a Management Plan

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Revise** next to **Management Plan**. The Management Plan screen displays with the most current Management Plan data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Management Plan screen.

-OR-

Select **Finish** to return to the Application Packet screen.



---

**TIP:** When creating a revision, the system maintains the previously-approved Management Plan that can be accessed via the YYYY - YYYY SFSP Management Plan history screen.

---



## Food Production Facility

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

### To access the Food Production Facility List

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list screen displays.



Food Production Facilities	
00001	Status: Active
<b>Sample Organization</b>	
DBA:	
123 Any Street	
Des Moines, IA 50317	
Type of Agency: Educational Institution	
Type of SFSP Organization: Not Selected	
<b>Facility Name</b>	
Summer Food Kitchen	
<input type="button" value=" &lt; Back"/> <input type="button" value=" Add Facility"/>	

Figure 20: Food Production Facilities list screen

### To add a Food Production Facility

---

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

-OR-

Select **Finish** to return to the Food Production Facilities list screen.

## **To modify a Food Production Facility**

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list screen displays.
4. Select the facility you want to modify. The Food Production Facility screen displays.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Food Production Facility screen.

-OR-

Select **Finish** to return to the Food Production Facilities list screen.

## **To delete a Food Production Facility**

---

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



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

## Budget Detail

The Budget Detail screen must be completed by Sponsors annually. 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.

### To access the Budget Detail

---

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

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

### To add a Budget Detail

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Add** next to **Budget Detail**. A blank Budget Detail screen displays.
4. Complete the form.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Budget Detail screen.

-OR-

Select **Finish** to return to the Application Packet screen.

**Note:** The **Operating Reimbursement** and **Administrative Reimbursement** sections are display only. The system calculates total number of sites, total anticipated meals and total anticipated reimbursement amount based on the number of site applications, anticipated meals served (by meal type) on the each site application, and USDA rates.

**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 the **Close** link at the bottom of the grid.

## To view a Budget Detail

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. To view the most current Budget Detail, select **View** next to Budget Detail. The Budget Detail screen displays.

-OR-

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

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

Figure 21: Sponsor Budget History screen

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

## To modify a Budget Detail

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Modify** next to **Budget Detail**. The Budget Detail screen displays with the most current, un-submitted budget data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Budget Detail screen.

-OR-

Select **Finish** to return to the Application Packet screen.

## To revise a Budget Detail

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Revise** next to **Budget Detail**. The Budget Detail screen displays with the most current budget data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Budget Detail screen.

-OR-

Select **Finish** to return to the Application Packet screen.



---

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

---

## Checklist Summary

The Checklist Summary identifies supplemental documents that need to be submitted to the state. The Checklist feature allows Sponsors to keep track of documents and their dates of submission. State users use this feature to identify when documents have been received and to denote the status of the documents.

A checklist item (also referred to as a Supporting Document) is additional documentation to be submitted with the Application Packet. Checklist items are automatically listed on the Checklist Summary screen based upon answers to specific questions from the Sponsor and site applications.

In SFSP, there are Sponsor-level and Site-level checklist items. A Sponsor-level checklist item is one supporting document for the Sponsor. Site-level checklist items is one supporting document for each site in which a site Applications is submitted.

### To access a Checklist

---





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

### To view a Checklist

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Checklist Summary**. The Checklist Summary screen displays.
4. Select the Sponsor or Site whose checklist you wish to view. The Checklist screen displays.

**Note:** Checklist items (i.e., supporting documents) display once a Sponsor has completed required questions on their respective Sponsor and site applications.

Required Forms/Documents to send to State Agency	Document Submitted to State Agency	Date Submitted to State Agency	Document on File w/State Agency	Status	Status Date	Last Updated By
Health Department Notification Letter	 <input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	03/18/2015	Developer
Organizational Chart	 <input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	03/18/2015	Developer
Food Safety Licensing / Department of Agriculture Certificates	 <input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	03/18/2015	Developer
Copy of Income Eligibility Application Form	 <input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	Pending Approval	03/18/2015	Developer

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

Figure 22: Checklist screen (partial screen)

## To update a Checklist

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Checklist Summary**. The Checklist Summary screen displays.
4. Select the Sponsor-level or Site whose checklist you wish to update. The Checklist screen displays.
5. Identify whether the document has been submitted by checking the “Document Submitted to State Agency” checkbox. Once this is checked, 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.
6. Select **Save**. The Checklist Summary screen displays.

## To upload an attachment to a Checklist item

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

1. Select the paper clip. The Checklist File Upload Details screen displays.
2. Use the **Browse** button to select the file to upload. If desired, enter a brief comment (field is not required)
3. Select **Save**.

**Upload Detail**

1. File To Upload:
2. Comment:

Figure 23: Checklist File Upload Detail screen



## Application Packet Notes for Sponsors

The Application Packet Notes for Sponsors provides the Sponsor the ability to view overall Application Packet notes created for the Sponsor 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 Sponsor application are viewable at the top of Sponsor application screen).

### To access application notes

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Application Packet Notes**. The Application Packet Notes screen displays.

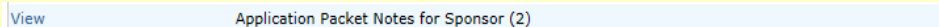
**Note:** The Notes feature is only accessible for State users. Sponsors do not have access to the Notes menu option and, therefore, will not be able to access any notes that were entered.

### To view an application note

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select View next to **Application Packet Notes for Sponsor**. The Application Packet Notes screen displays.

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



A screenshot of a menu item. On the left, the word "View" is displayed in a light blue box. To its right, the text "Application Packet Notes for Sponsor (2)" is displayed in a light blue box.

## Site Field Trip

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.

Note: Only approved sites can be associated with a Site Field Trip. Therefore, the Sponsor would not complete the Site Field Trip form as part of the initial Application Packet.

### To access the Site Field Trip List

---

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

Site	Field Trip Name	Date	Status
Sample County High School	American History Field Trip	7/3/2014	Submitted

Figure 24: 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).

### To add a Site Field Trip

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
4. Select the **Create New Field Trip** button. A blank Site Field Trip screen for the specified year is displayed.
5. Select the Sponsor's Site that will conduct the field trip.
6. 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.

7. Complete the form.
  8. Select **Save**. A confirmation screen displays.
  9. Select <**Edit** to return to the Site Field Trip screen.
- OR-
- Select **Finish** to return to the Field Trip – Site List screen.

### **To modify a Site Field Trip**

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
  2. On the menu, select **Application Packet**. The Application Packet screen displays.
  3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
  4. Select the field trip you want to modify. The Site Field Trip screen displays.
  5. Modify any desired information.
  6. Select **Save**. A confirmation screen displays.
  7. Select <**Edit** to return to the Site Field Trip screen.
- OR-
- Select **Finish** to return to the Field Trip – Site List screen.

### **To cancel a Site Field Trip**

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
  2. On the menu, select **Application Packet**. The Application Packet screen displays.
  3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
  4. Select the field trip you want to cancel. The Site Field Trip screen displays.
  5. Check the box in question 6 “Cancel Request”.
  6. Select **Save**. A confirmation screen displays.
  7. Select <**Edit** to return to the Site Field Trip screen.
- OR-
- Select **Finish** to return to the Field Trip – Site List screen.



---

**TIP:** Only approved field trips can be cancelled. If the field trip is not approved, but it will no longer occur, use the Delete feature.

---



---

**WARNING:** A cancelled field trip cannot be “un-cancelled”. If the Sponsor decides to re-instate the field trip, a new field trip must be added.

---

## To delete a Site Field Trip

---

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



---

**TIP:** A field trip cannot be deleted once it is approved. If the field trip will not occur, see the “To cancel a Site Field Trip” section.

---



---

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

---

## Advance Requests

Sponsors 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 Sponsor-specific.

### To access Advance Requests

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
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	
		<b>Totals</b>	\$ 64,000.00	\$ 0.00		

Figure 25: Advance Request list screen

### To add an Advance Request

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select Add next to the advance month for which you would like an advance. The Advance Request screen displays.
4. Select the type of advance you are requesting.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Advance Request screen.  
-OR-  
Select **Finish** to return to the Advance Requests list screen.

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

**Note:** A Sponsor may request up to three (3) Operating Advances and up to two (2) Administrative advances for a designated program year.

## To view or modify an Advance Request

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select the advance you would like to view or modify. The Advance Request screen displays.
4. Update information, if desired.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Advance Request screen.  
-OR-  
Select **Finish** to return to the Advance Requests list screen.

## To delete an Advance Request

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select the advance you would like to delete. The Advance Request screen displays.
4. Select **DELETE** on the Edit menu in the top-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.
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.

## **Download Forms**

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

### **To access Download Forms**

---

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

### **To download or view a form**

---

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Download Forms**. The Download Forms screen displays a list of all available forms.
3. Select the Form ID of the form you wish to download. If the form is a document, a gray dialog box appears.

**Note:** If the state associated the link with a URL and not to a document, when the user selects the Form ID, the respective website will be opened in a second window.

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

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

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

### Download Forms

View:

<input type="checkbox"/>	Form ID	Description	Last Modified	New Sponsor?
<input type="checkbox"/>	SFSP (11)			
	SFSP-000	List of Downloadable Documents	03/13/2015	N
	SFSP-002	Summer Weekend Meals and Mobile Farmers' Market Application	03/13/2015	N
	SFSP-003	Sample Health Department Notification Letter	03/13/2015	N
	SFSP-004	Sample Media Release Form A (Open and Restricted Sites)	03/13/2015	N
	SFSP-006	Pre-Operational Visit Site Selection Worksheet	03/13/2015	N
	SFSP-007	Annual Agreement and Policy Statement	03/13/2015	N
	SFSP-008	Sample Organizational Chart Template	03/13/2015	N
	SFSP-010	USDA Memo on Non-Congregate Feeding Demonstration Project	03/13/2015	N

[< Back](#)

**Figure 26: Download Forms screen (partial screen)**

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



# Claims

# 4

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

## About the Claims Process

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

**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 CRRS .NET Help Desk to validate the effective date of the Sponsor application and Site application.

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

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

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

## Claims Menu

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

<b>Item</b>	<b>Description</b>
Claim - SFSP	Summer Food Service Program Claims
Claim Rates	View current claim rates
Payment Summary	Summary of payments made to this Organization

Figure 27: Claims Menu screen

## Claim Dates

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

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

## **Claims**

The SFSP claim function is used to enter, modify, and view claims. The system provides the ability to submit claims at the Sponsor or site level. Original and upward adjusted claims cannot be submitted if the received date is more than 60 days 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.



---

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

---

### **To access Claim Entry**

---

1. On the blue menu bar, select **Claims**. The Claims menu screen displays.
2. From the Claims menu, select the **Claim - SFSP**. The Claim Year Summary screen displays.

If a Sponsor has already been selected, the Claim Summary screen displays.

If no Sponsor has been selected, use the Sponsor Search to search for and select a Sponsor.

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

## Claim Year Summary

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

- Adj Number: identifies the number of revisions associated with the claim. Each revision must be re-processed by the state.
- Claim Status: identifies the current status of the claim.
- Date Received: identifies the date the system initially received the claim submission. Note: the State has the authority to modify this date.
- Date Processed: identifies the date the claim was included in the payment batch process.
- Earned Amount: identifies the current value of the claim.

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

Claim Month	Adj Number	Claim Status	Date Received	Date Processed	Earned Amount
Oct 2013					\$0.00
Nov 2013					\$0.00
Dec 2013					\$0.00
Jan 2014					\$0.00
Feb 2014					\$0.00
Mar 2014					\$0.00
Apr 2014					\$0.00
May 2014					\$0.00
Jun 2014	0	Processed	07/10/2014	07/10/2014	\$302,466.92
Jul 2014	0	Processed	08/07/2014	08/07/2014	\$143,976.89
Aug 2014					\$0.00
Sep 2014					\$0.00
<b>Year to Date Totals</b>					<b>\$446,443.81</b>

Figure 28: Claim Year Summary screen

## Claim Month Details

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

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

Claim Month: July 2012						
Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
<a href="#">View</a>   <a href="#">Summary</a>	0	08/29/2012	08/30/2012	09/04/2012	\$16,221.23	Processed
<a href="#">View</a>   <a href="#">Summary</a>	1	09/04/2012	09/04/2012	09/04/2012	\$1,164.29	Processed
<b>Total Earned</b>					\$17,385.52	

Figure 29: Claim Month Details screen – Example of Processed Claims

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

Claim Month: August 2010						
Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
<a href="#">View</a>   <a href="#">Modify</a>   <a href="#">Summary</a>	0	11/30/2010	01/26/2011		\$109.55	Accepted
<b>Total Earned</b>					\$109.55	

Figure 30: Claim Month Details screen – Example of Non-Processed Claims

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

## Claim Site List

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

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

Figure 31: Claim Site List screen

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

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

Month/Year Claimed	Adjustment Number	Date Received	Date Accepted	Date Processed	Reason Code		
Jul 2013	0						
Internal Use Only							
Actions	Site #	Site Name	1st Meal Amount	2nd Meal Amount	Previous Amount	Errors	Status
<a href="#">View</a>   <a href="#">Modify</a>	0001	Sample County High School	\$0.00	\$0.00	\$0.00		Validated
<b>Total</b>			<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>		<b>Net \$0.00</b>

Figure 32: Claim Site List screen

## To add an original claim

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired 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.

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

Figure 33: Claim Month Details screen – Add Original Claim

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

4. Under Actions, select **Add** to the left of the Site Name you wish to add an original claim. The Claim for Reimbursement screen displays
5. For each site claim, enter claim information for all enrolled programs.
  1. Select **Save**. If there are no errors, the data is saved and the user is returned to Claim Site List screen.
  2. Repeat Steps 3-6 for each desired site.
  3. 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.

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

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

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



---

**WARNING:** An original claim cannot be submitted by a Sponsor if the received date is more than 60 days since the last day of the claim month/year. For exceptions to this rule, contact the CRRS .NET Help Desk.

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

If the Sponsor happens to be operating only 1 month that is LESS than 10 days, the State must instruct the Sponsor 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 Sponsor to submit a claim into the system.

---

## To modify an un-processed claim

---

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired 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 you wish to view. The Site Claim Report screen displays.

**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 for each desired site claim you would like to modify.
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 submit the modified claim, check the Certification box and select the Submit for Payment button.

**Note:** When the **Submit for Payment** button is selected, the system performs additional edit checks. If the system identifies errors, the errors must be corrected before the user can submit the claim for payment.





---

**WARNING:** An original claim cannot be submitted by a Sponsor if the received date is more than 60 days from the last day of claim month/year. For exceptions to this rule, contact the CRRS .NET Help Desk.

---

## To revise 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 30 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 the desired Claim Month. The Claim Month Details screen displays.
3. If the Sponsor is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Revise** to the left of the Site Name whose claim you wish to revise. The Claim for Reimbursement screen displays

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

4. Make any necessary changes to the claim.
5. Select **Save**. If there are no errors, the data is saved and the user is returned to Claim Site List screen.
6. Repeat Steps 3-5 for each desired site.
7. 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.

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

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



---

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

---

## To view a claim

---

1. From the Claims menu, select the **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Sponsor is performing Sponsor-level claiming, select **View**. The Claim for Reimbursement screen displays.

If the Sponsor is performing site-level claiming, the Claim Site List screen displays.

Under Actions, select **View** to the left of the Site Name you wish to view. The Claim for Reimbursement screen displays

## To view a Claim Summary

---

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Sponsor is performing site-level claiming, the Claim Site List screen displays.  
Under Actions, select **Summary** to the left of the Site Name you wish to view. The Claim for Reimbursement Summary screen displays.

## To delete a claim

---

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select **Modify**.
4. Select **Modify** to the left of the Site Name you wish to view. The Claim for Reimbursement screen displays
5. Select **DELETE** in the Edit menu in the upper-right corner.
6. The system transfers you to the bottom of the screen and a warning message is displayed.

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



---

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

---

## **Claim Rates**

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

### **To access Claim Rates**

---

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

**Claim Rates for SFSP**  
**Rate Year: January 1, 2014 to December 31, 2014**

**Federal Reimbursement Rates**

<b>Operating Rates</b>		<b>Administrative Rates</b>	
	Maximum Rate Per Meal	Rural and All Self- Preparations Sites Maximum Rate Per Meal	Vended Urban Sites Maximum Rate Per Meal
Breakfast	1.8400	0.1825	0.1450
Lunch/Supper	3.2100	0.3350	0.2775
Supplements	0.7500	0.0900	0.0725

**Figure 34: Claim Rates for SFSP screen**



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

## **Payment Summary**

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

### **To access Payment Summary**

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

Schedule Number	Processed Date	Warrant Issue Date	Earned Amount	Adjustments	Distribution Amount
14080703	08/07/2014		\$ 143,976.89	\$ 0.00	\$ 143,976.89
14071003	07/10/2014	07/14/2014	\$ 302,466.92	\$ 0.00	\$ 302,466.92

Figure 35: Payment Summary List screen

### **To view a Payment Summary**

1. From the Claims menu, select **Payment Summary**. The Payment Summary List screen displays.
2. Select the payment record you wish to view. The payment summary information displays for all payments included in the payment batch.
3. Select the **<Back** button to return to the previous screen.

Schedule Number	Schedule Process Date	Federal Year	Warrant Number	Paid Date
14071003	07/10/2014	2013-2014	4216856	07/14/2014

Account Description	Month	Transaction Description	Amount
SFSP Meals			
	Jun 2014	Original Claim	\$ 274,200.84
	Jun 2014	Distribution for Claim #257312	\$ 274,200.84
SFSP Admin			
	Jun 2014	Original Claim	\$ 28,266.08
	Jun 2014	Distribution for Claim #257312	\$ 28,266.08

Payment Schedule Summary			
	Jun 2014	SFSP Meals	\$ 274,200.84
	Jun 2014	SFSP Admin	\$ 28,266.08
<b>Total Payments</b>			<b>\$ 302,466.92</b>

Figure 36: Payment Summary screen

# Security

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

## Security menu

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

### To access the Security menu

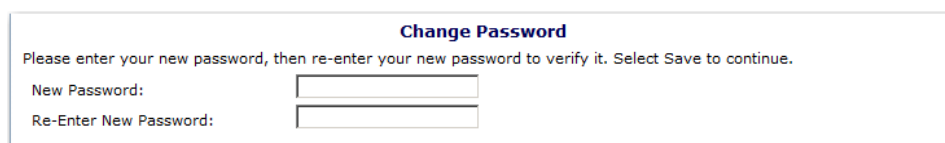
---

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

### To access Change Password

---

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



**Change Password**

Please enter your new password, then re-enter your new password to verify it. Select Save to continue.

New Password:

Re-Enter New Password:

Figure 37: Change Password screen

**Note:** Security configuration settings require a password eight (8) to twelve (12) characters in length. Please note that the password must be at least eight (8) characters in length. The password must contain at least one number, one uppercase letter, and one special character (e.g., #, \$, &). Passwords are case sensitive.



# 7

## Application Packet Process

*This section of the manual provides information on how the State can review and approve SFSP Application Packets through CRRS .NET.*

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

### Submitting an 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 system validates the business rules and the application’s status is set by the system to either “Error” (if any errors exist) or “Not Submitted” (no errors, but the Application Packet has not been submitted).

Only complete Application Packets that have no errors can be submitted to the State. To submit a completed Application Packet, the Sponsor would select the **Submit for Approval** button. This simulates sending a completed Application Packet in the mail. Application items are placed in a view-only mode for the Sponsor.

An Application Packet can be submitted to the State (i.e., the **Submit for Approval** button is enabled) only if the following conditions have been met:

- The Sponsor Application must contain no errors.
- At least one Site Application must exist and contain no errors.
- A Management Plan must exist and contain no errors.
- A Budget must exist and contain no errors.
- All items in the Checklist must be submitted (submitted checkbox checked and date submitted is entered).
- The Sponsor is not closed.



Once the Sponsor has submitted the Application Packet, the State will review each item in the submitted Application Packet. The State may approve each application item, deny an application item, or return the application item and its respective Application Packet back to the Sponsor for correction.

If the Application Packet is denied or returned to the Sponsor for correction, the State will provide comments within the respective Application Packet item as to why the application was denied or what needs to be corrected in order to re-submit the Application Packet.

## SFSP Application Packet Checklist Items

### Sponsor Application

---

The following checklist items are required under the following conditions:

Checklist Item	Condition
Agreement/Policy Statement	If Application Type = "New Application"
Health Department Notification Letter	For all Sponsors each year
Organizational Chart	For all Sponsors each year
Food Safety Licensing / Department of Agriculture Certificates	For all Sponsors each year
ServSafe Certificate of Training	For all Sponsors each year
Media Release for Sites in Economically Depressed Areas	If Form A - Media Release is selected
Public Release for Closed Enrolled and Camp sites	If Form B - Media Release is selected
Food Service License Waiver	If Self-Prep, does sponsor have a Food Service License? = NO
Food Service License	If Self-Prep, does sponsor have a Food Service License? = YES
Copy of Income Eligibility Application Form	If "Will the prototype Public Release provided by the State be used?" = NO

### Site Application

---

The following checklist items are required under the following conditions:

Checklist Item	Condition
Pre-Operational Visit Form	If Application Type = "New Application"
Documentation from Migrant Organization	If Eligibility Letter = "Migrant Organizational Letter"

**Note:** If the Sponsor submits a Revised Application, which occurs when a Sponsor makes any changes to an "Approved" Application Packet, the packet's status automatically changes to "Not Submitted". The State is required to perform all of the steps identified above for the revised Application Packet.

# Application Packet Statuses

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

- Not Submitted
  - The packet has a status of “Not Submitted” when the packet is created for the first time or when any of the packet items are created, revised, or modified, but the Application Packet has not been submitted to the State.
- Submitted
  - The packet has a status of “Submitted” when the Sponsor uses the **Submit for Approval** button on the Application Packet screen to submit the error-free packet to the State for review.
  - If the packet status is “Submitted”, the entire packet becomes read-only to the Sponsor.
  - All applications that are “Submitted” must ultimately be “Approved”, “Denied”, or “Returned for Correction” or “Withdrawn”.
- Approval Recommended (i.e., First Level Approved)
  - When a Sponsor is new to the program, the system will require two levels of approval. This status represents the first level of approval performed by the State before a final approval is granted.
  - The Application Packet screen will display the **First Approval** button when the first level approval is required. After the button has been selected, this button will not display; however, the **Approve** button will be displayed.
- Approved
  - The packet has a status of “Approved” when the State has approved each packet item AND has selected the **Approve** button on the Application Packet screen.
- Denied
  - The packet has a status of “Denied” when the State selects the **Deny** button on the Application Packet screen.
  - When a packet is “Denied”, the packet remains view-only and nothing in the packet can be modified. The only way to edit items in a denied packet is for the State to change the status of the packet to something other than “Denied”.
  - By denying an Application Packet, the status of all items within the packet is automatically set to “Denied”.
  - An “Approved” packet cannot be “Denied”.
- Returned for Corrections
  - The packet has a status of “Returned for Corrections” when the State selects the **Return** button on the Application Packet screen.
  - This status unlocks the packet for the Sponsor and sets the status back to “Not Submitted”.
  - An “Approved” packet cannot be “Returned for Corrections”.

- Withdrawn
  - The packet has a status of “Withdrawn” when the Sponsor or State selects the **Withdraw** button on the Application Packet screen.
  - An Application Packet with a status of “First Level Approved” can be withdrawn.
  - An Application Packet with a status of “Approved” packet cannot be “Withdrawn”. If an application has been “Approved”, it can only be “Cancelled” or “Terminated” by the State (see *Application Packet* section).

# Application Statuses

Statuses are used to define the current state of an application packet item. Each application can have only one status at a time.

- Pending Validation
  - The application has a status of “Pending Validation” when the application has not yet been opened or saved.
- Error
  - The application has a status of “Error” if it has failed system validation rules. Data entered is maintained.
- Not Submitted
  - The application has a status of “Not Submitted” when the application is saved without error, but the Application Packet has not been submitted to the State.
- Submitted
  - The application has a status of “Submitted” when the Sponsor has submitted the Application Packet to the State for review (i.e., the Sponsor has selected the **Submit for Approval** button).
  - Any application that is marked “Not Submitted” is changed to “Submitted”
  - The Application Packet becomes read-only to Sponsor users.
- Approved
  - The application has a status of “Approved” when the State has approved the application.
- Denied
  - The application has a status of “Denied” when the State has denied the application.
  - If the application is “Denied”, it can no longer be modified by the Sponsor. Only the State can change the status of the application.
  - When setting the application status to “Denied”, the State should enter a comment in the Comments to Sponsor field explaining the reason the application was denied.
- Returned for Correction
  - The application has a status of “Returned for Correction” when the State has identified errors in the application and the State has returned the packet to the Sponsor.
- Withdrawn
  - The application has a status of “Withdrawn” when the State or Sponsor has selected the Withdraw Packet button on the Application Packet screen.
  - If the Application Packet has ever been approved, there will not be an option to withdraw.

## Claim Statuses

Statuses are used to define the current state of a claim. Each claim can have only one status at a time.

- Not Eligible
  - The claim has a status of “Not Eligible” when there is an application condition that is preventing claiming for the selected month (e.g., Sponsor or site is not authorized on the Application Packet to operate for the selected month or the Application Packet status is not “Approved”).
- Incomplete
  - The claim has a status of “Incomplete” when the claim has been created in the system but the **Save** button was never clicked (e.g., timeout, logout, etc.). The system saves the data that has been entered, but no edits have been performed.
- Error
  - The claim has a status of “Error” when the claim has been submitted and has business rule violations.
- Pending
  - The claim has a status of “Pending” when the claim has been saved and on-line edits have been performed, but the claim has not been submitted and validated with additional edits (e.g., 15/30 days edit, etc.).
  - Applicable only when the Sponsor is participating in Sponsor-level claiming.
- Validated
  - This site claim has a status of “Validated” when the site claim has been entered, validated, and contains no errors.
  - Applicable only when the Sponsor is participating in site-level claiming.
- Accepted
  - The claim has a status of “Accepted” when the claim has passed all on-line edits and additional edits (e.g., 15/30 days edit, etc.), and is ready to be included in the payment tracking process.
  - The claim can still be modified. A revision is not necessary until the claim is included by the State in a batch payment process.
- Accepted\*
  - The claim has a status of “Accepted\*” when the claim has been selected by the State for inclusion in the batch payment process; however, the batch process has not run.
  - The claim cannot be modified. If the claim requires a change, a revised claim must be submitted.
- Processed
  - Claim has been fully processed by the State and has been sent to the State’s Accounting Office for disbursement of funds.