snacs
School Nutrition Accountability Software

SNACS

SNACS SFA User Manual — Student Management, Counting and Claiming, & Admin

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Wisconsin Department of Public Instruction
SNACS SFA User Manual —Student Management, Counting and Claiming, & Admin

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Table of Contents

Chapter 1: Getting Started 9

Dashboard 10
Viewing a Message 11
Printing a Message 12
Deleting a Message 13
Module Navigation 14
Log Out of SNACS 15
How to Use This Manual 16
Text Conventions 16
Category and Page Conventions 17
Icon Conventions 18
Message Conventions 18
Using List Display Controls 19

Chapter 2: Student Management 22

Student Management at a Glance 22
Students 23
Searching for a Student Record 25
Viewing a Student Record 26
Adding a Student Record 31
Updating a Student Record 35
Changing Eligibility 36
Adding an Image / Document 38
Removing an Image / Document 40
Adding a Note 41
Student File Upload 42
Uploading a Student File 44
Searching for an Import Record 46
Viewing Import Details 47
Duplicate Student Report 48
Generating a Duplicate Student Report 49

Chapter 3: Counting and Claiming— Eligibility Summary 50

Eligibility Summary at a Glance 50
Upload File 51
Uploading an Eligibility Summary file 53
Exporting Failed Records to a Text File 56
View Eligibility Summary 57
Generating the Eligibility Summary Report 58

Chapter 4: Counting and Claiming—POS 60
POS at a Glance 60
Upload File 61
Uploading a POS file *63*
Student Meals (Report) 65
Generating the Student Meals Report *66*
Meal Count (Report) 67
Generating a Summary Meal Count by Site Report *68*
Generating a Detailed Meal Count by Site Report *69*
Remove Meals 70
Removing Meals *71*

Chapter 5: Counting and Claiming—Edit Check 72
Edit Check at a Glance 72
Attendance Factor 73
Displaying Attendance Factors *74*
Setting an Attendance Factor *75*
Changing an Attendance Factor *76*
Edit Check Report 77
Generating a Summary Edit Check Report *78*
Generating a Detailed Edit Check Report *79*
Review Exceptions 80
Displaying a List of Exceptions *81*
Resolving an Edit Check *82*
Viewing Edit Check Resolution Comments *83*
Generating the Edit Check Exceptions Report *84*

Chapter 6: Counting and Claiming—Claims 86
Claims at a Glance 86
Reimbursement Claims 87
Listing Generated Reimbursement Claims *88*
Creating a Reimbursement Claim *88*
Re-creating a Reimbursement Claim *89*
Submitting a Reimbursement Claim *90*
Generating a Summary Claim Report *91*
Generating a Detailed Claim Report *92*

Chapter 7: Admin—Sites and Users 94
Sites and Users at a Glance 94
About Organizational Levels and User Roles 95
SFAs 96
Setting the Same School Year Start Date and Carryover End Date for All Sites *98*
Setting a School Year Start Date for an Individual Site *99*

Setting a Carryover End Date for an Individual Site *101*
Displaying General Information for an SFA *103*
Displaying All Sites for an SFA *104*
Displaying Site Details *104*
Displaying All Users Assigned to an SFA *106*
Displaying User Profile Details *107*
Adding a User *108*
Updating User Details *112*
Sites 115
Displaying All Sites for a Site Type *117*
Displaying Site Details *118*
Users 119
Displaying a User *122*
Adding a New User *123*
Updating User Details *126*
Deactivating a User *128*
Login Details 130
Displaying User Login History *132*
Displaying User Login Activities *133*

Chapter 8: Admin—Management 134
Management at a Glance 134
Reimbursement Rates 135
Viewing Reimbursement Rates *138*
Eligibility Guidelines 139
Viewing Eligibility Guidelines *141*
Printing an Income Eligibility Guidelines Report *142*
Student Import Codes 144
Updating a Student Import SFA Code *145*
Updating a Student Site Import Code *146*
System Settings 147
Updating a System Setting *148*

Appendix A: Messages 150

Appendix B: System Settings 155

Tables & Figures

Table 1.1 Text Conventions 16
Table 1.2 Icon Conventions 18
Table 1.3 Message Conventions 18
Table 2.1 Manage Students Menu Functions 22
Table 2.2 Manage Students Page Functions 23
Table 2.3 Students Listings 24
Table 2.4 Student File Upload Page Functions 42
Table 2.5 Student Data Import History Listings 43
Table 2.6 Duplicate Student Report Page Functions 48
Table 3.1 Eligibility Summary Menu Selections 50
Table 3.2 Upload File Page Functions 52
Table 3.3 Eligibility Summary File Failed Records Listings 53
Table 3.4 View Eligibility Summary Page Functions 57
Table 4.1 POS Menu Selections 60
Table 4.2 POS File Upload Page Functions 61
Table 4.3 POS Upload File History Listings 62
Table 4.4 Student Meals Page Functions 65
Table 4.5 Meal Count Page Functions 67
Table 4.6 Remove Meals Page Functions 70
Table 5.1 Edit Check Menu Selections 72
Table 5.2 Attendance Factor Page Functions 73
Table 5.3 Edit Check Report Page Functions 77
Table 5.4 Review Exceptions Page Functions 80
Table 6.1 Claims Menu Selections 86
Table 6.2 Reimbursement Claims Page Functions 87
Table 7.1 Sites and Users Menu Selections 94
Figure 7.1 Wisconsin Department of Instruction and School Food Authorities Structure 95
Table 7.2 Site List Listings 97
Table 7.3 Sites Page Functions 116
Table 7.4 Site List Listings 116
Table 7.5 Users Page Functions 120
Table 7.6 User List Listings 121
Table 7.7 Login Details Page Functions 130
Table 7.8 Login History Listings 131
Table 8.1 Management Menu Selections 134
Table 8.2 Reimbursement Rates Page Functions 135
Table 8.3 Reimbursement Rates Listings 137
Table 8.4 Eligibility Guidelines Page Functions 139
Table 8.5 Eligibility Guidelines Listings 140

Table 8.6 Student Import Codes Page Functions *144*
Table 8.7 System Settings Page Functions *147*
Table A.1 Messages for Admin *151*
Table A.2 Messages for Counting and Claiming *151*
Table A.2 Messages for Counting and Claiming, continued *152*
Table A.3 Messages for Contract *152*
Table A.4 Messages for Reports *153*
Table B.1 System Settings for Admin *156*
Table B.2 System Settings for Counting and Claiming *156*

End of Contents

Chapter 1:
Getting Started

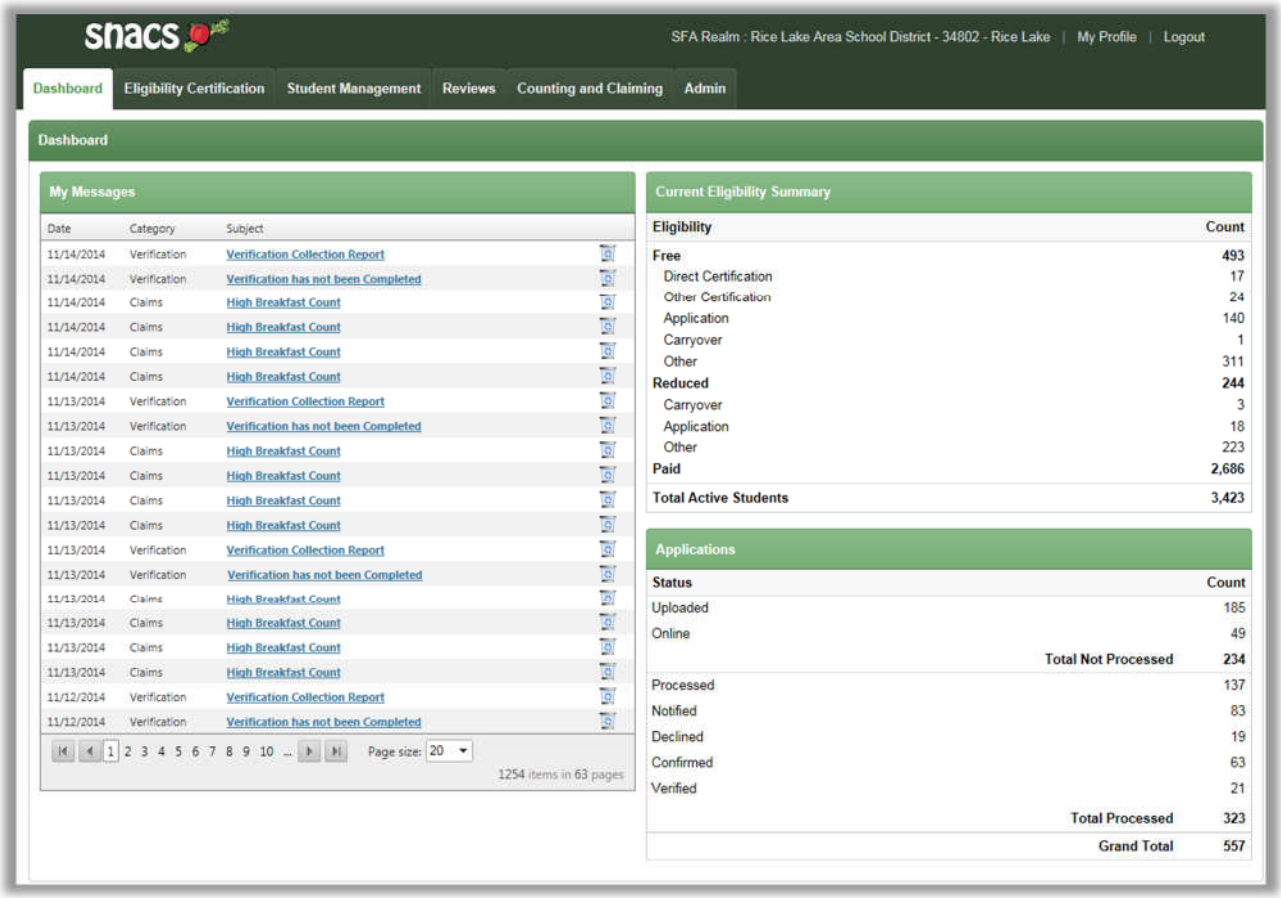
In this chapter you will learn:

- ✓ About Dashboard messages and widgets.
- ✓ How to navigate in the SNACS window.
- ✓ How to log out of SNACS.
- ✓ How to use this manual.

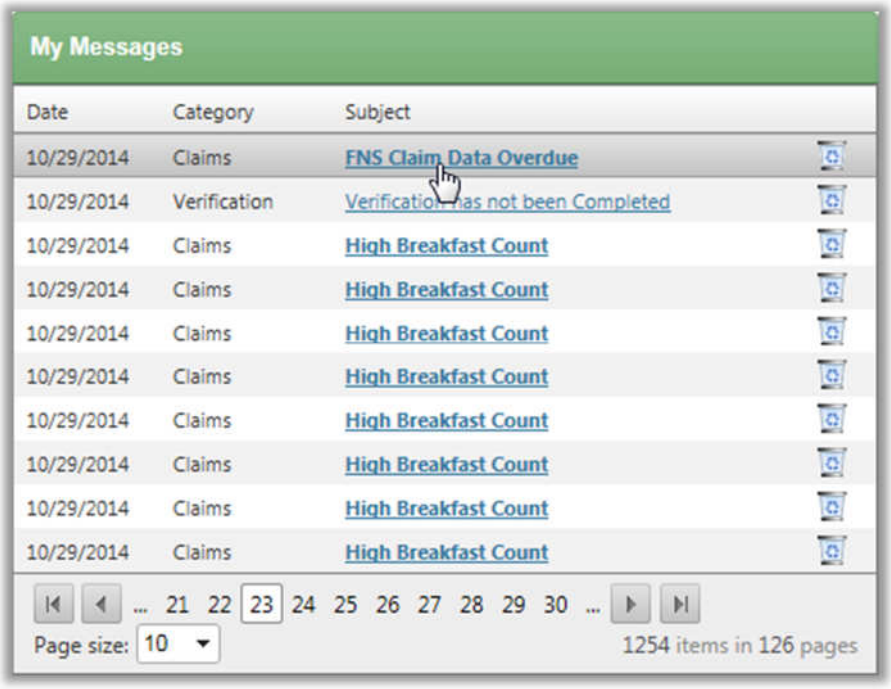
Dashboard

When you first login, the **Dashboard** tab appears. This tab provides

- My Messages – reminders to file claims and of critical Verification dates; list is updated each evening; messages shown in bold type are unread messages; messages shown relate to your function with SNACS; messages must be manually removed; see Appendix B: Messages.
- Current Eligibility Summary – separate counts for each eligibility are shown along with the total number of active students; data is read only.
- Applications - Free and Reduced Price Meal Application details; shown when SNACS is used to process applications for free or reduced-price meals; data is read only.

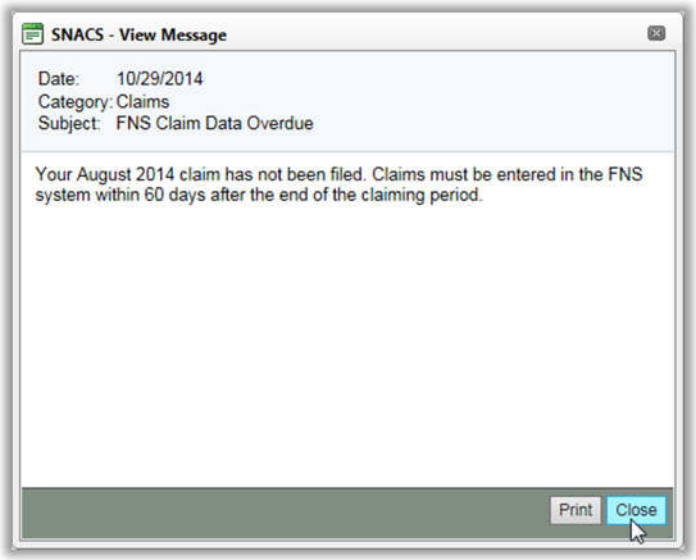


Viewing a Message



In the **My Messages** list

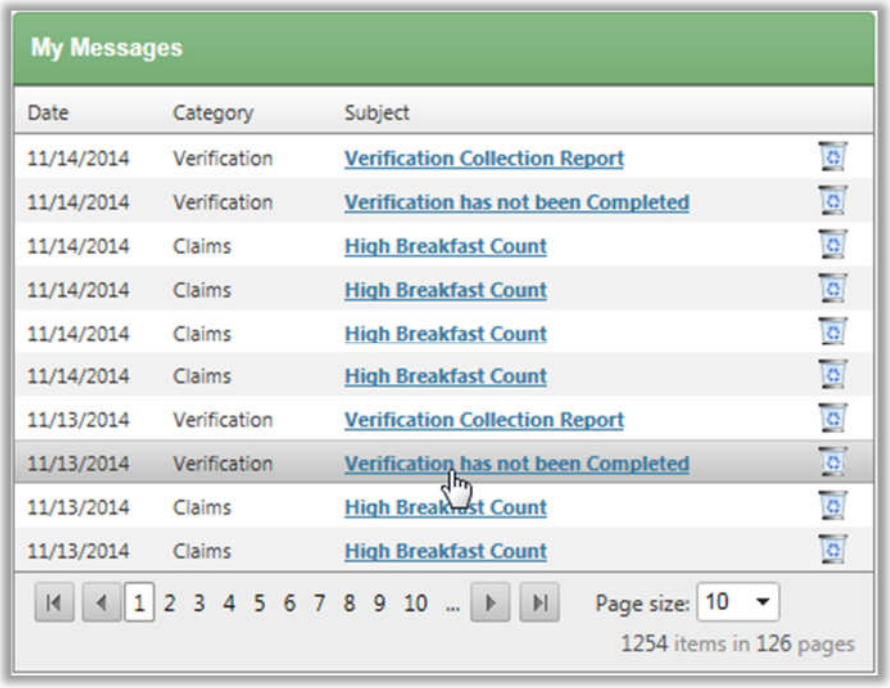
- Click a **Subject** link in a message listing.



The message appears in the **View Message** popup.

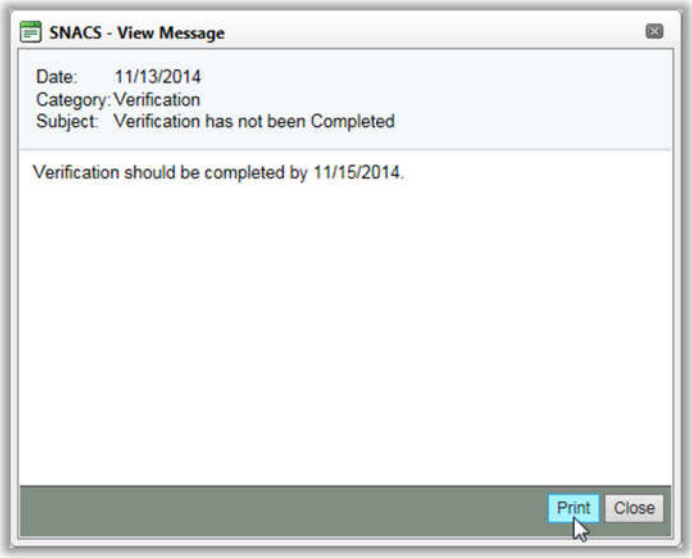
- Click Close to close the **View Message** popup.

Printing a Message



In the **My Messages** list

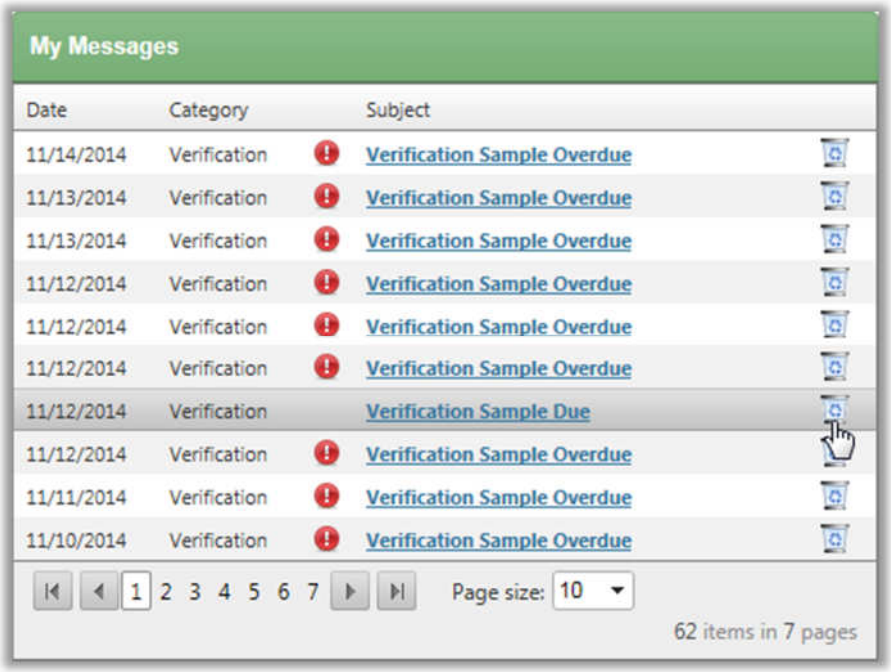
- Click a **Subject** link in a message listing.



The message appears in the **View Message** popup.

- Click Print to send the message to the printer.

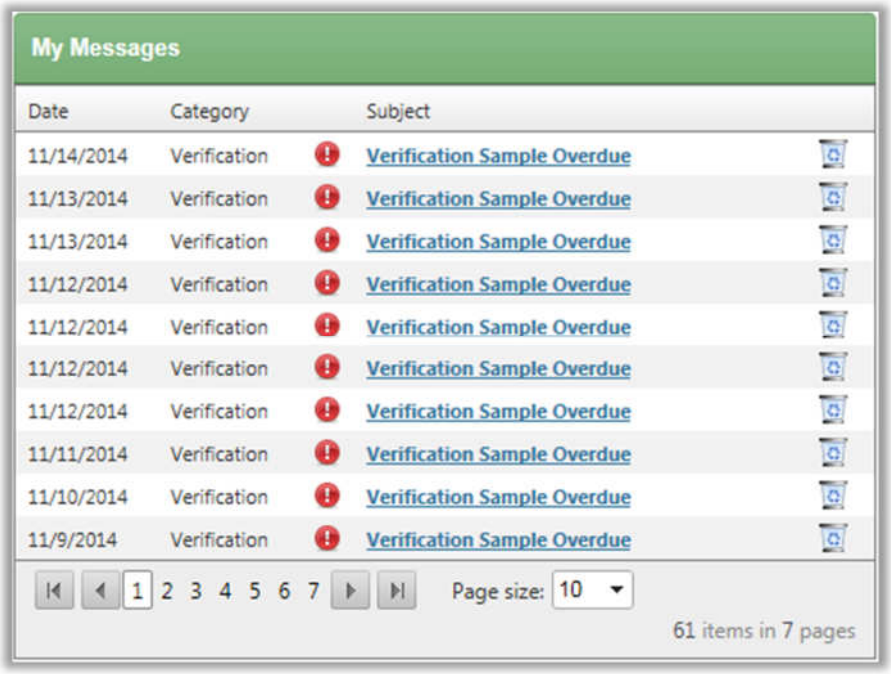
Deleting a Message



In the **My Messages** list

- Click **Delete** ( ) in a message listing.

Caution!
You are not prompted to confirm the deletion. Deleted messages cannot be retrieved.



The message is removed from the list.

Module Navigation

When you log in to SNACS you see one or more modules that your user-role has permission to access. You will see one tab for each module.

To access a module

Click the module tab.

The module home page is displayed.

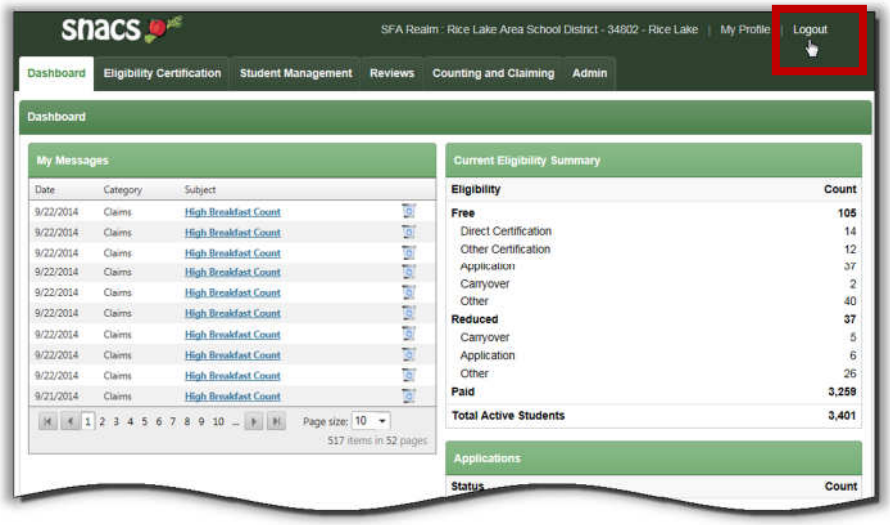
The **Admin** module offers two (2) categories in the navigation bar on the left of the SNACS web page.

Note

Categories and menu selections to which you have access are those appropriate for your role within SNACS. Therefore, when you log in to SNACS, you may see a subset of the tabs and categories shown above, or you may see a subset of the menu selections that are reviewed in this manual.

Log Out of SNACS

Logging out of SNACS can be performed from any page.



To log out of SNACS from any page

- Click **Logout**.

The Wisconsin Department of Public Instruction page is displayed.

For security reasons, you should close your browser if you do not want to immediately login to other DPI online programs or services.

How to Use This Manual

Style conventions are used to help you relate what you see in this book to what you see on the SNACS website.

Text Conventions

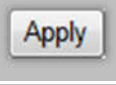
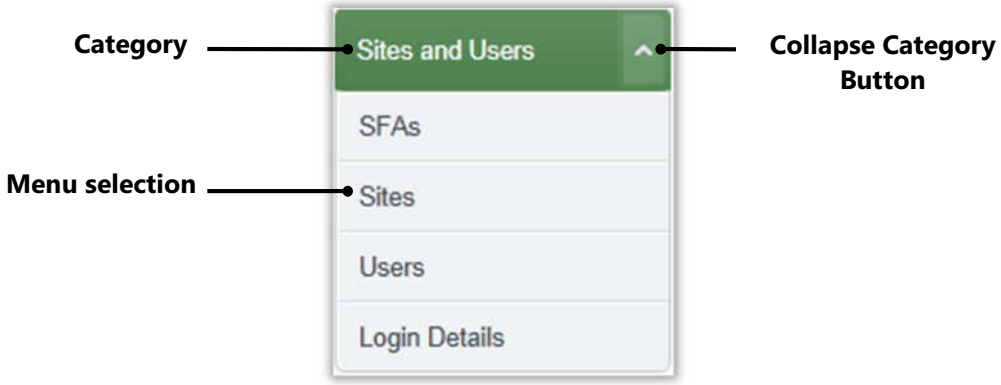
Item	Convention	Example
Button	Graphic as seen on page	Click  .
Clickable icon	Icon name in bold followed by graphic	Click **Calendar** ( ).
Clickable link	Bold, underlined	Click the **User Name** in the **User Name** column.
Field name	Bold, underlined, capitalization as seen on page	In **Role**, select a role. In **First Name**, enter the user's first name.
Group name	Bold, capitalization as seen on page	In the **User Profile** group… In the **Roles** group…
Key name	Small caps	TAB key ENTER key
Category name	Bold, title caps	The **Sites and Users** category is…
Menu selection	Bold, capitalization as seen on page	Select **Login Details** on the…
Message	Italics, enclosed in quotes, capitalization as seen on page	"*User successfully updated*."
Module Name	Bold, title caps, enclosed with square brackets	**[Admin]**
Page name	*Italics*, title caps	On the *Site Details* page…
Selection sequence	Bold, capitalization as seen on page, separated with ">"	**[Admin] > Management >Eligibility Guidelines**
Window name	Italics, title caps	In the *Report Viewer* window, click…

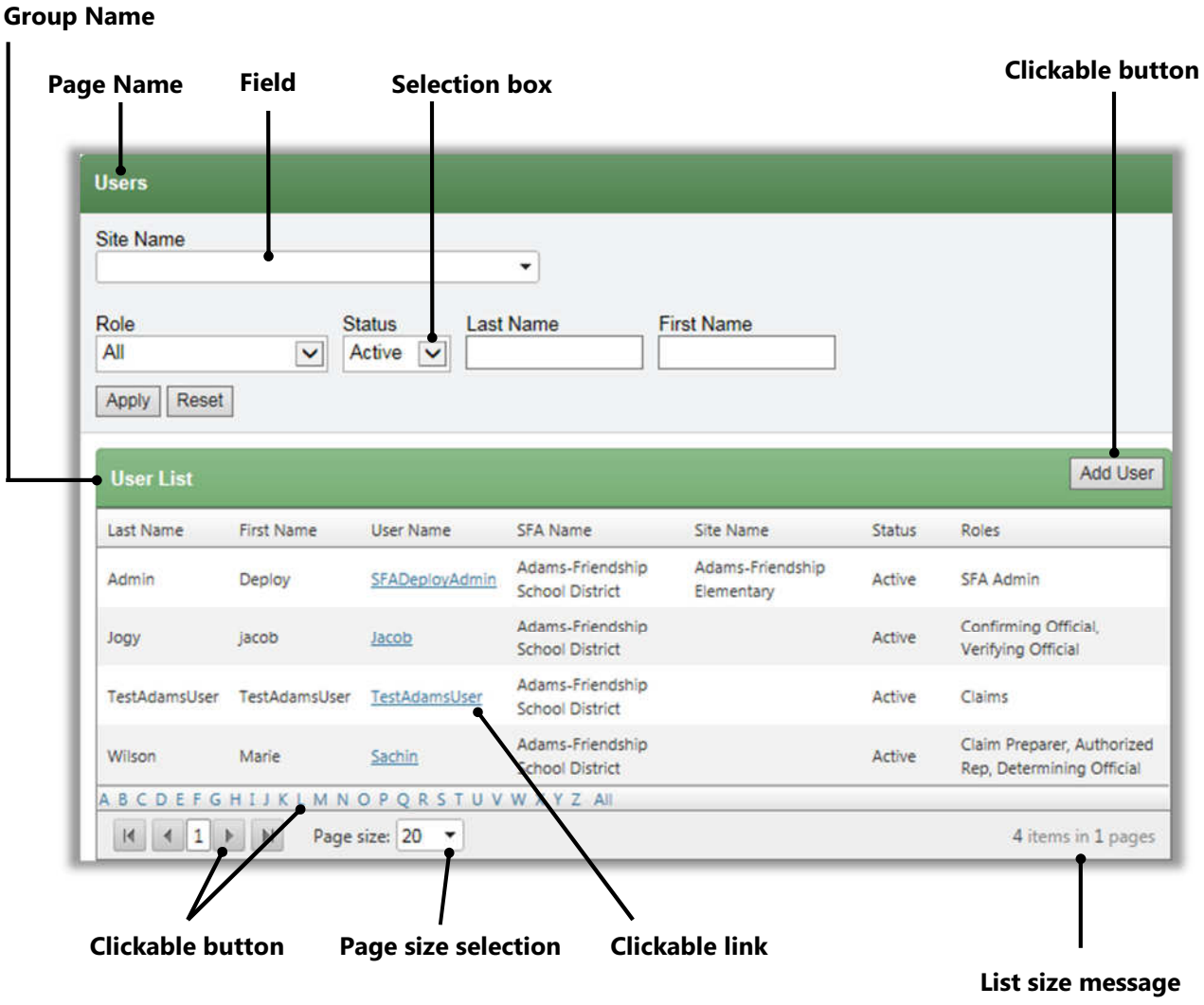
Table 1.1 Text Conventions

Category and Page Conventions

Categories



Pages



Icon Conventions

Several icons are used in this manual to alert you to particular information that is critical or helpful to your use of SNACS.

Icon	Name	What it means
	Note	Additional information on the use or operation of the command or topic.
	Careful!	Information that is critical to the use of the feature or menu selection.
	Tip	Information that may help to use the feature more effectively.

Table 1.2 Icon Conventions

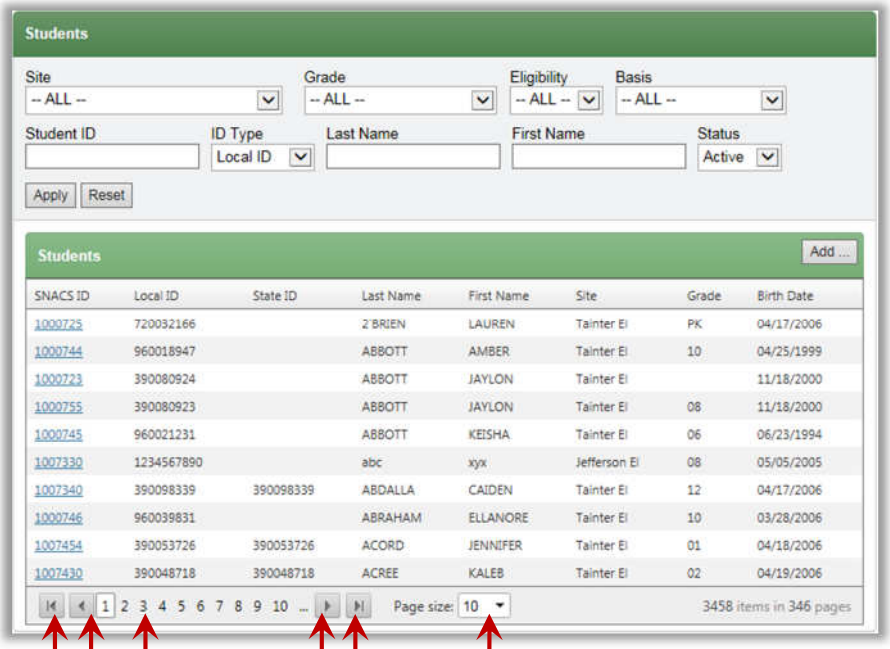
Message Conventions

Messages are displayed above the page name. The following message conventions are used in the software.

Message Type	What it means	Example
Confirmation	Affirms the success of the operation; no action is required.	User has been added successfully.
Error	Indicates that an error has been made; action is required to successfully complete the operation.	Please complete all required fields.

Table 1.3 Message Conventions

Using List Display Controls



Some pages display listings on multiple pages. Display controls are provided below the listings to move between the pages.

Two types of controls are provided:

Page controls:

To change the number of listings displayed on a page, select a number from **Page size** drop-down list.

To display the last page of listings, click .

To display the next page of listings, click .

To display a specific page of listings, click number button such as .

To display the previous page of listings, click .

To display the first page of listings, click .

End of Chapter

Chapter 2:
Student Management

In this chapter you will learn how to:

- ✓ Search for a student record(s).
- ✓ View a selected student record.
- ✓ Update a student record
- ✓ Add a student record.
- ✓ Manually change student eligibility.
- ✓ Upload an image or document to a student record.
- ✓ Add notes to a student record.

Student Management at a Glance

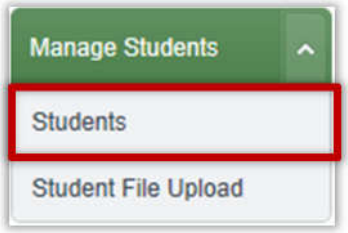
Menu Selection	Description
Manage Students	Search for, display and add a student record, and manage student eligibility, files and notes.
Student File Upload	Upload a file with student data to update current records.
Duplicate Student Report	

Table 2.1 Manage Students Menu Functions

Note

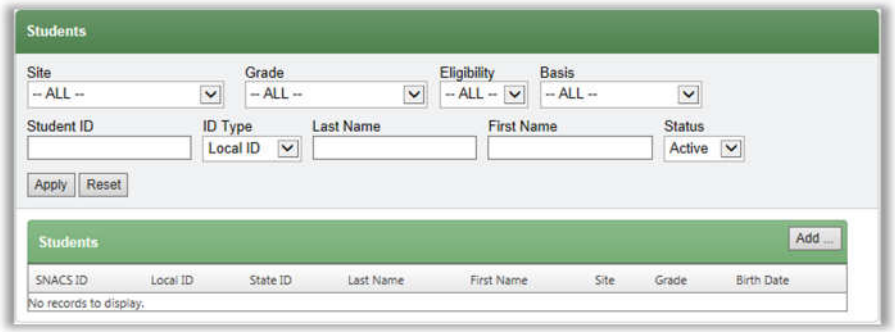
Categories and menu selections to which you have access in SNACS are those appropriate for your assigned role(s). When you access the **Manage Students** menu, you may see a subset of the menu selections listed above.

Students



The **Students** function:

- Adds new student records.
- Searches for student records.
- Updates student record details.



By default on the *Students* page

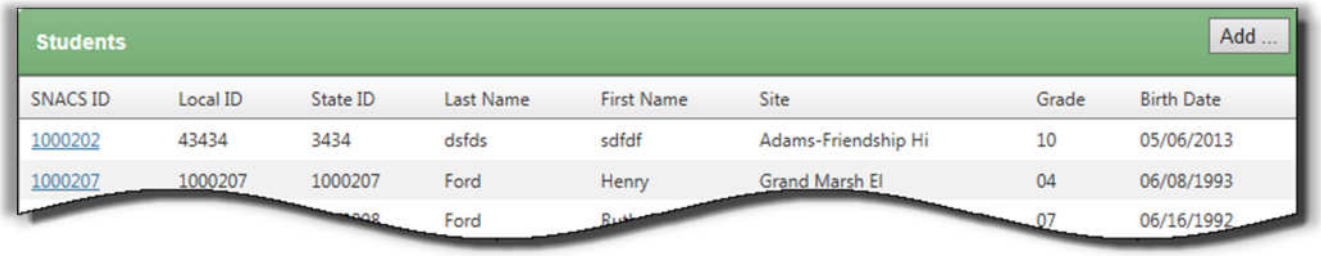
- **Site**, **Grade**, **Eligibility**, and **Basis** are set to "ALL".
- **ID Type** is set to "Local ID".
- **Status** is set to "Active".

Page Functions

Field/Button	Description
Apply	Click to list all student records that match the selected search criteria.
Reset	Click to clear all selected search criteria.
Add ...	Click to display the **Add New Student** page; use the **Add New Student** page to manually create a Student record for new students.

Table 2.2 Manage Students Page Functions

Listings: Students



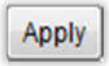
Each listing in **Students** includes:

Header Name	Data Type	Description
SNACS ID	*Clickable link*	*Sortable;* Identifier assigned by the SNACS system.
Local ID	*View only*	*Sortable;* Identifier assigned by the local SFA.
State ID	*View only*	*Sortable*; Identifier assigned by the state of Wisconsin.
Last Name	*View only*	*Sortable*; Student's last name.
First Name	*View only*	*Sortable;* Student's first name.
Site	*View only*	*Sortable*; Name of student's assigned school location.
Grade	*View only*	*Sortable*; Student's assigned grade level.
Birth Date	*View only*	*Sortable*; Student's birth date; birth date is in the format of MM/DD/YYYY.

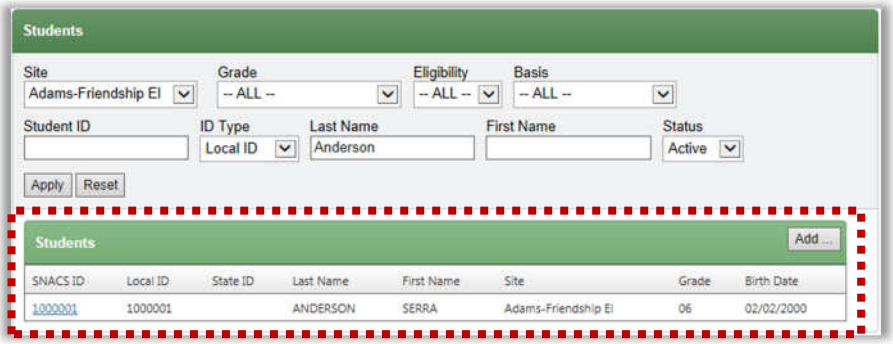
Table 2.3 Students Listings

Searching for a Student Record

On the *Students* page

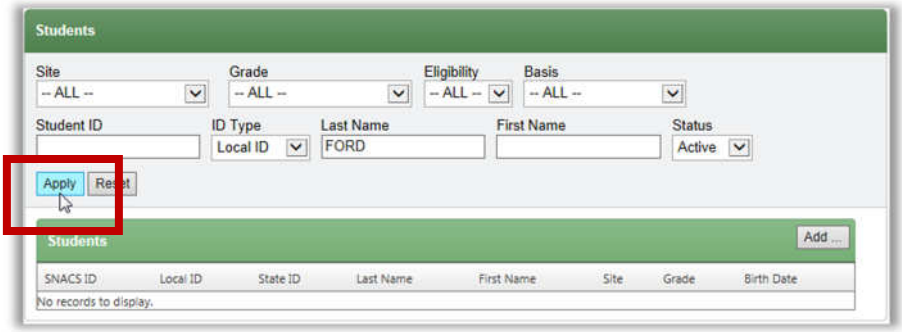
- Enter or select search conditions, as needed.
- Click 

.



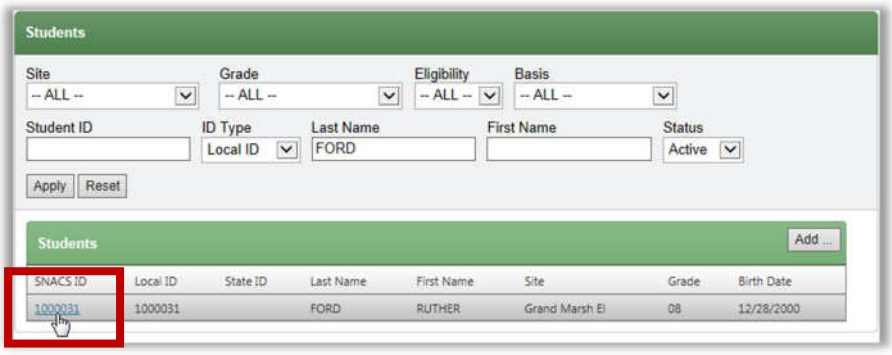
All records that meet the search conditions are shown in the **Students** list.

Viewing a Student Record



On the *Students* page narrow search results by

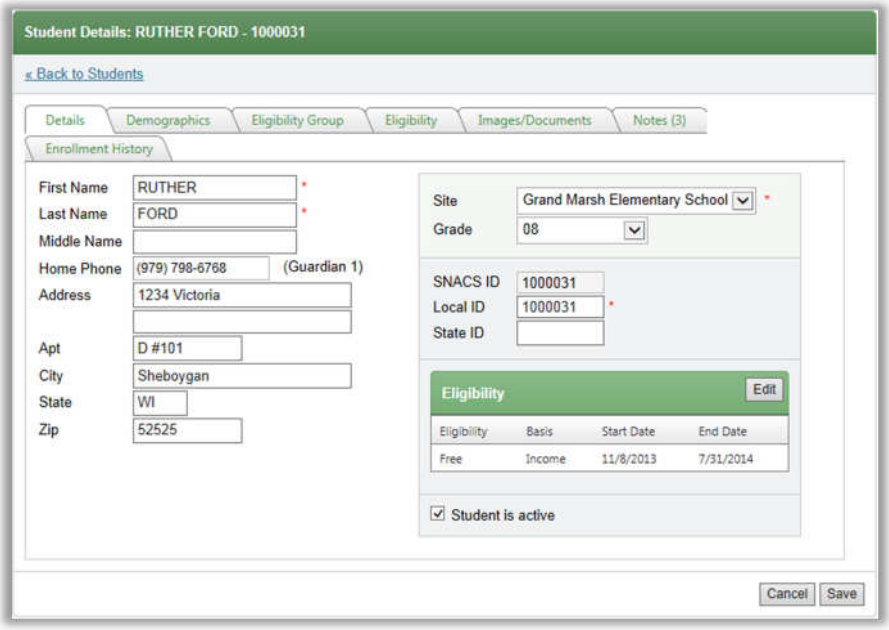
- In **Site**, select a site.
- In **Grade**, select a grade level.
- In **Eligibility**, select a benefits eligibility.
- In **Basis**, select a basis for the eligibility.
- In **Student ID** enter one identifier.
- In **Last Name** and **First Name**, enter complete or partial names.
- In **Status**, choose an available status.
- Click Apply.



On the *Students* page

- Click a **SNACS ID** link in a student listing to open the details for that student.

Tab 1 - Details

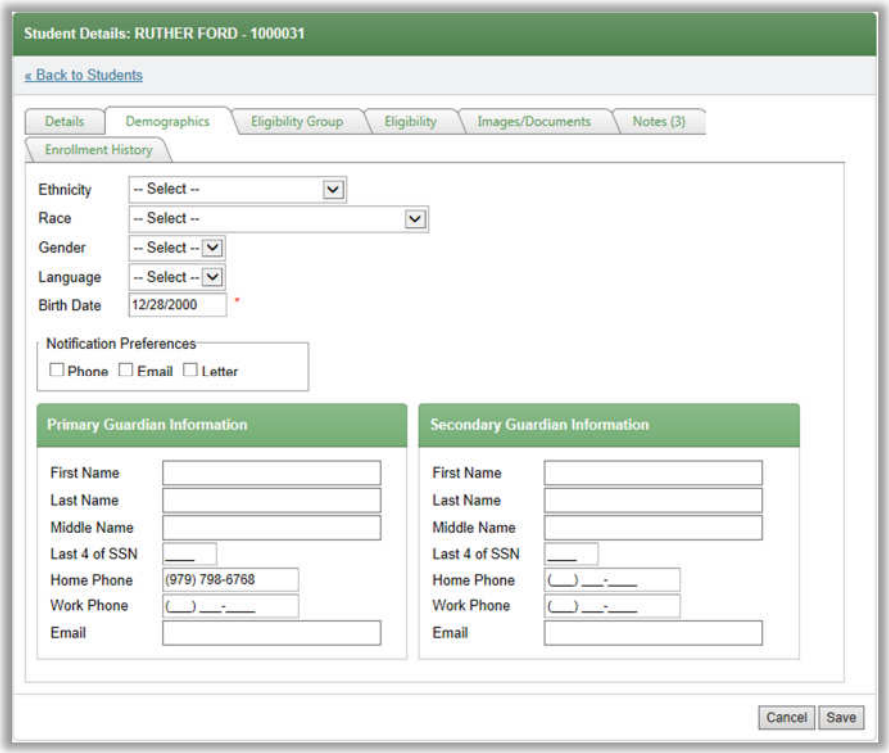


The **Details** tab lists basic student information, such as if the student is active in SNACS.

Note

Make changes to student data in the Student Information System and import them into SNACS. Changes made directly in SNACS could be overwritten by the next import.

Tab 2 - Demographics

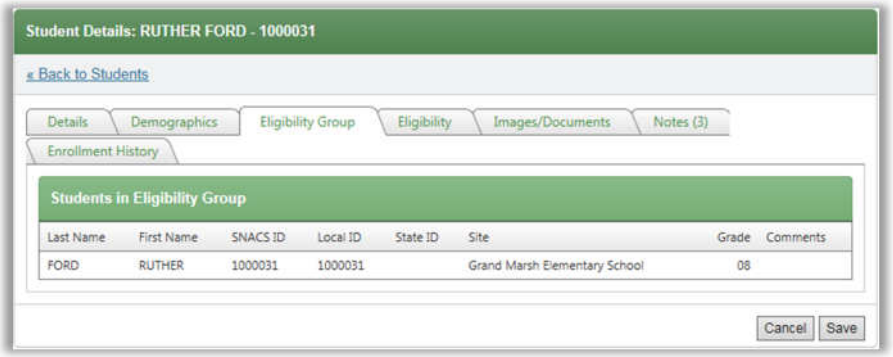


The **Demographics** tab lists demographic and Guardian information imported from the Student Information System or entered in SNACS.

Note

Make changes to student data in the Student Information System, not in SNACS. Changes made in SNACS could be overwritten by the next import. (Guardian information may be updated by the import, but will not be erased.)

Tab 3 – Eligibility Group

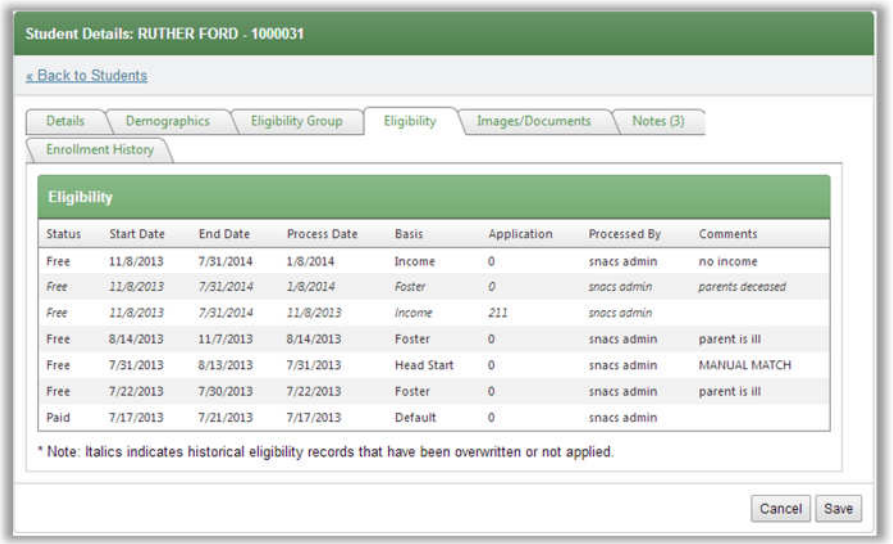


The **Eligibility Group** tab displays all the students in the same eligibility grouping (receive their benefits from the same source).

Students are combined in an eligibility grouping when they are processed on an application together or received their eligibility through DC Sibling Match.

Note
No changes can be made on this tab.

Tab 4 - Eligibility



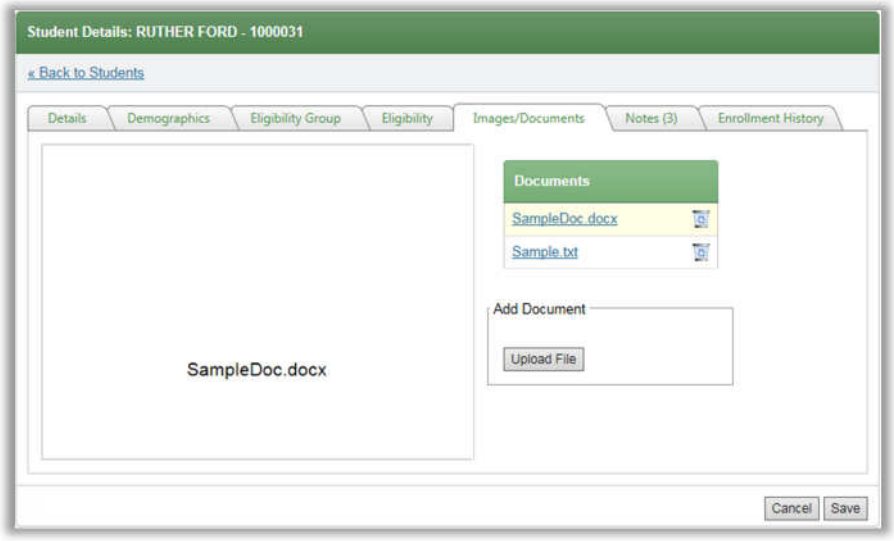
The **Eligibility** tab displays the student's status history. The most recent record is listed first.

All students will have an original eligibility record with **Status** of "Paid" and **Basis** of "Default".

Any student without an application or other basis for Free or Reduced Status is given a Reason of "Default".

Note
No changes can be made on this tab.

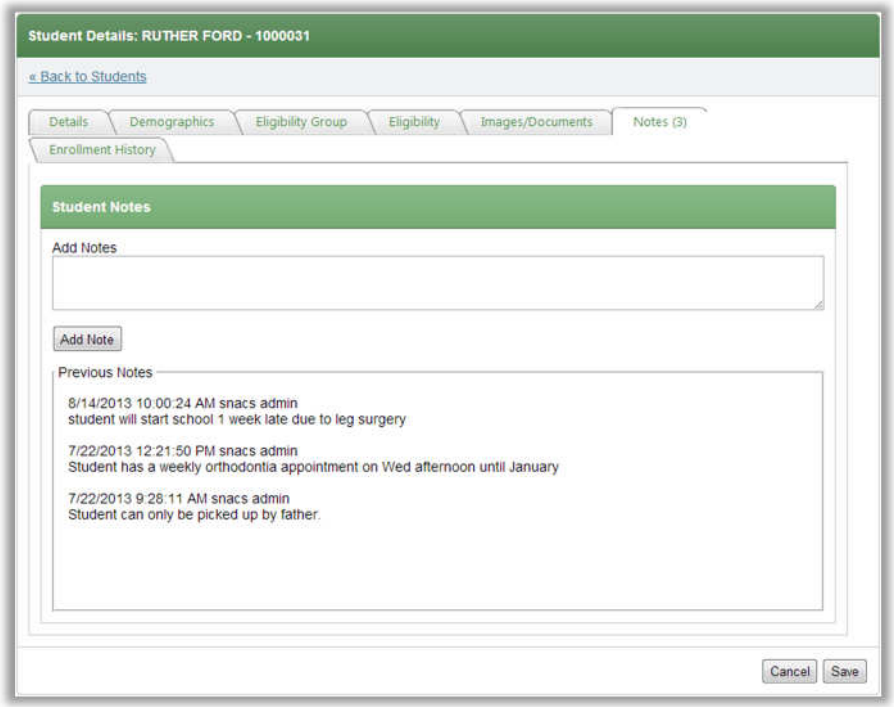
Tab 5 – Images/Documents



The **Images/Documents** tab displays documents or other files that have been uploaded pertaining to the student.

-

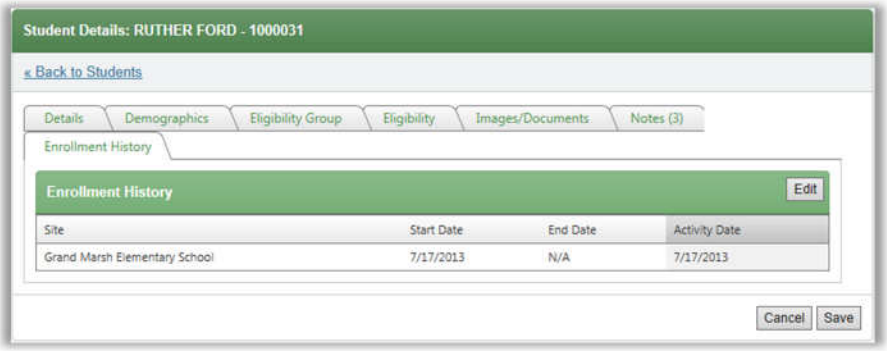
Tab 6 - Notes



The **Notes** tab lists all notes recorded for the student in **Previous Notes**. New notes are entered in **Add Notes**.

Notes are shown in chronological order with the most recent note shown at the top of the list.

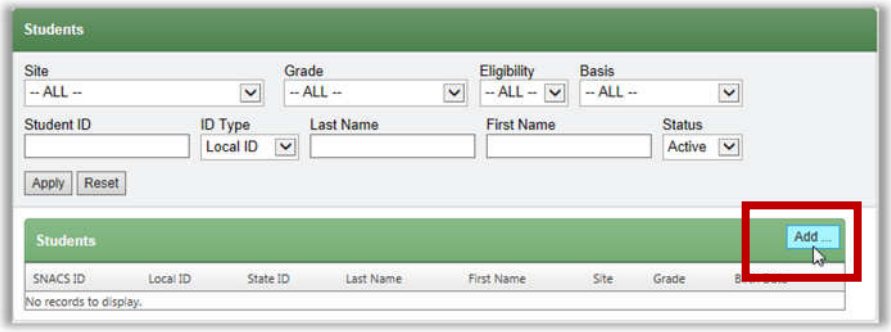
Tab 7 - Enrollment History



The **Enrollment History** tab displays each school in your SFA in which the student has been enrolled. The most recent record is listed first. Student history may not be complete. Information displayed on this page is a function of the user's permissions.

Although the Enrollment History can be edited on this page, it is recommended that changes in enrollment be imported from your Student Information System.

Adding a Student Record

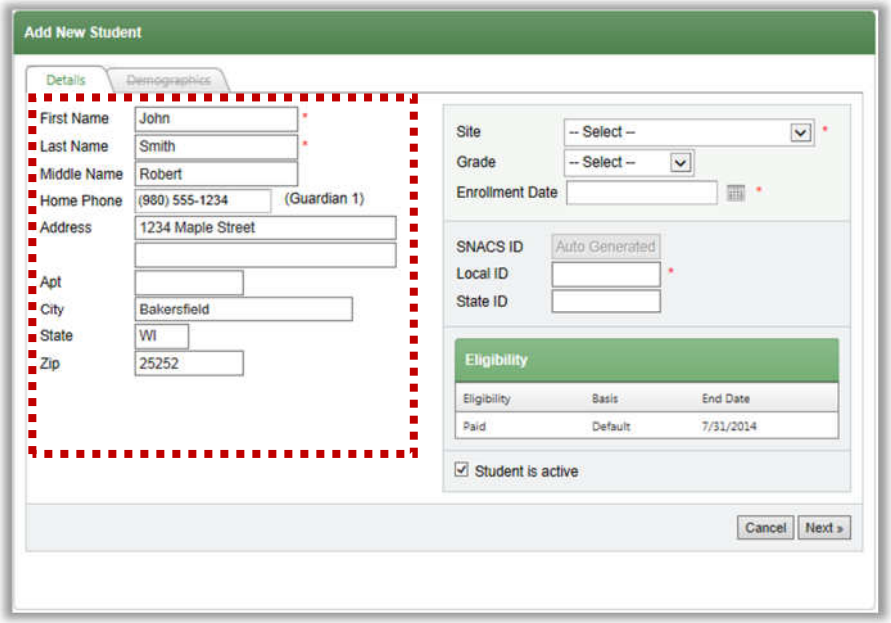


On the *Students* page

- Click Add ... .

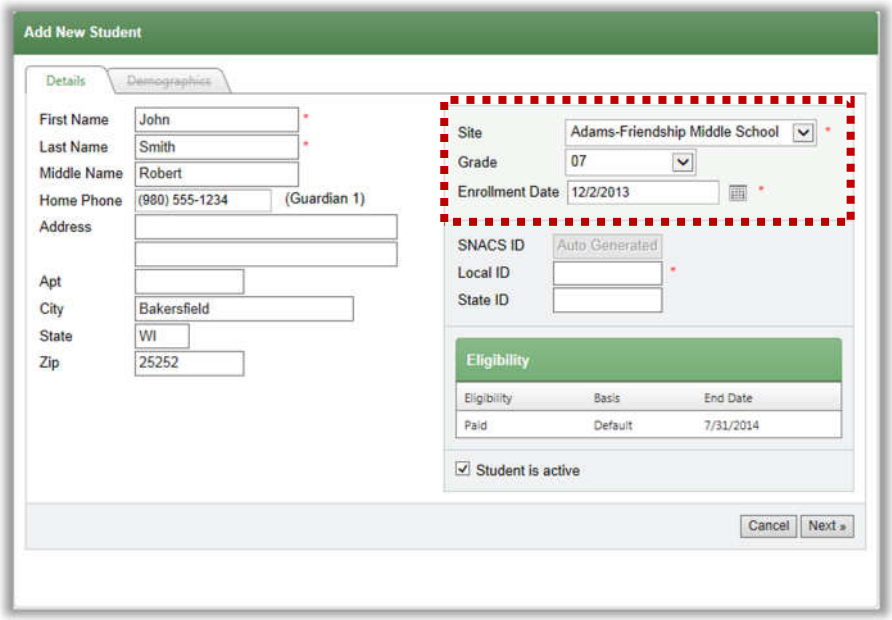
Note

Student records may be added on this page, but importing student records using the **Student File Upload** function is strongly recommended.



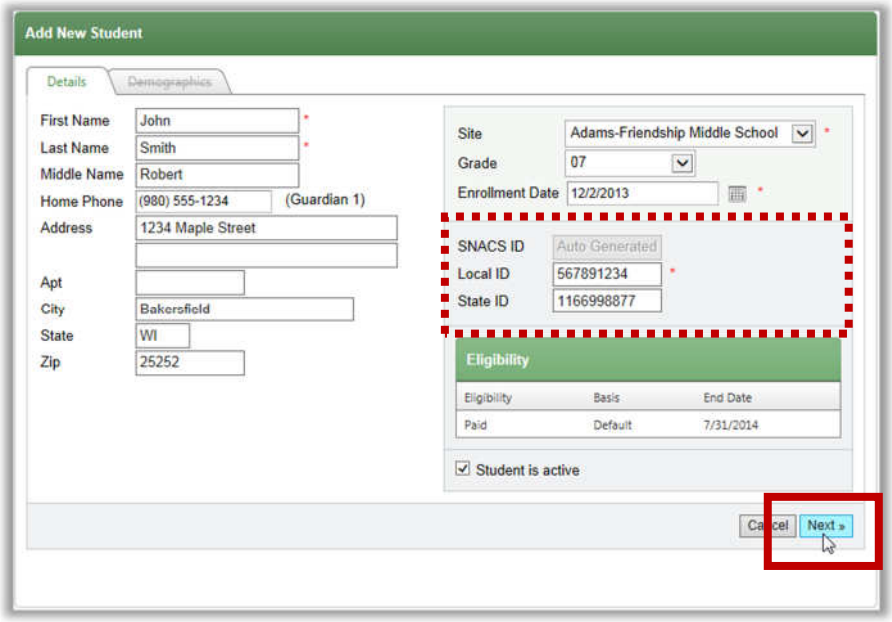
On the **Add New Student – Details** tab in the student contact group

- Enter the student's **First Name** and **Last Name** (**required**).
- Enter remaining information as needed.



On the **Add New Student – Details** tab in the school group

- Select the student's assigned school **Site** (**required**) and **Grade**.
- Enter or select **Enrollment Date** (**required**).



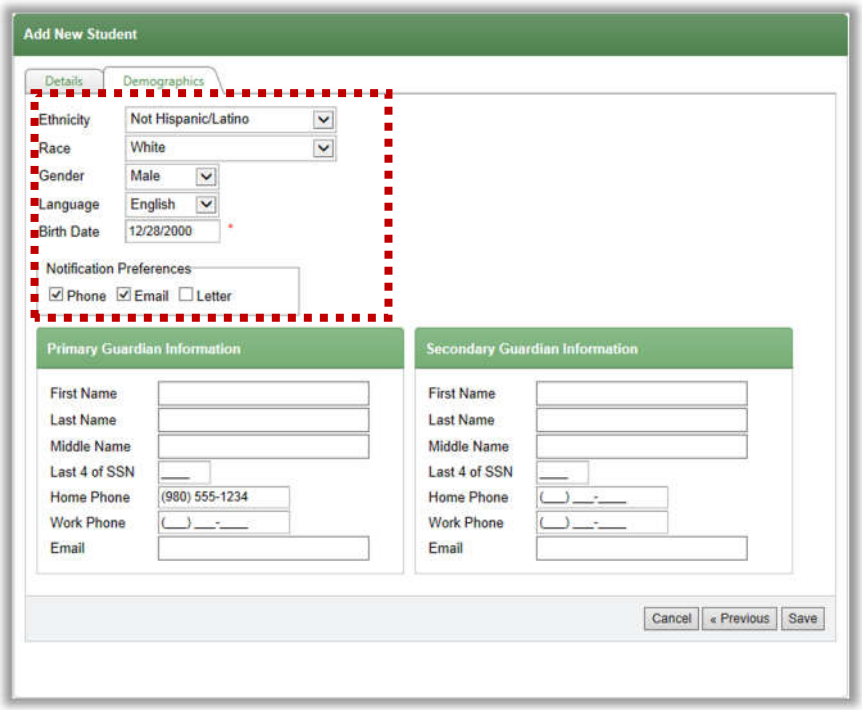
On the **Add New Student – Details** tab in the ID group

- In **Local ID**, enter the student ID assigned by the school.
- In **State ID**, enter the Wisconsin state ID (if known).
- Verify the **Student is active** check box is selected if the student is active.
- Click Next » .

Notes

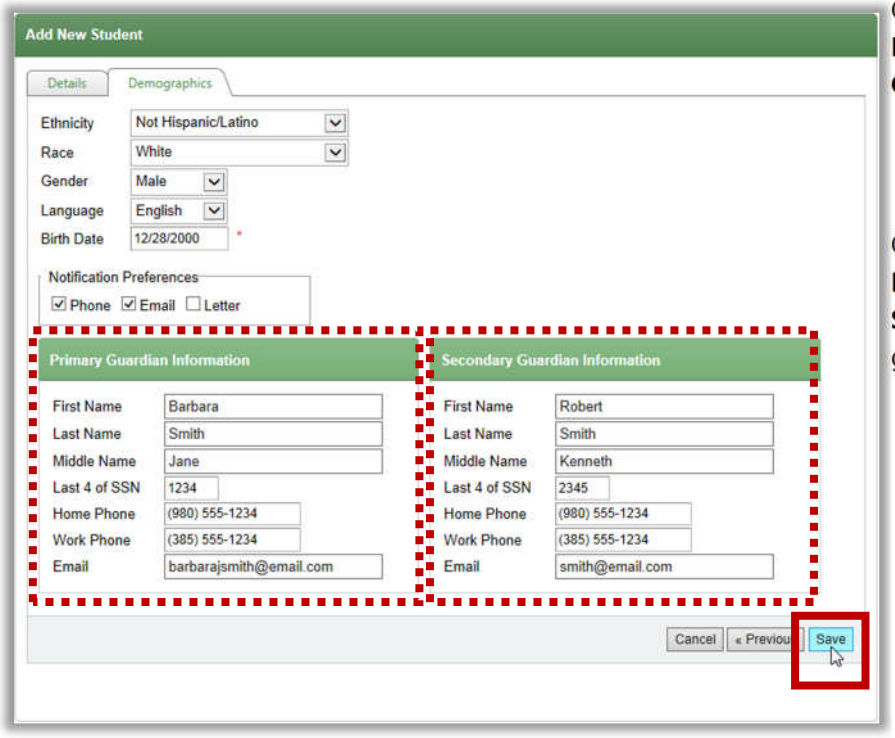
The SNACS ID is automatically generated by the system for students added manually or through the import process.

If the Local ID is not entered, a message appears; see the last step in this procedure for more information.



On the **Add New Student – Demographics** tab

- In **Ethnicity**, enter the student's ethnicity.
- In **Race**, enter the student's race.
- In **Gender**, enter the student's gender.
- In **Language**, enter the student's language.
- In **Birth Date**, enter the student's birth date (**required**).
- In **Notification Preferences**, select the parent's preferred method(s) of notification.

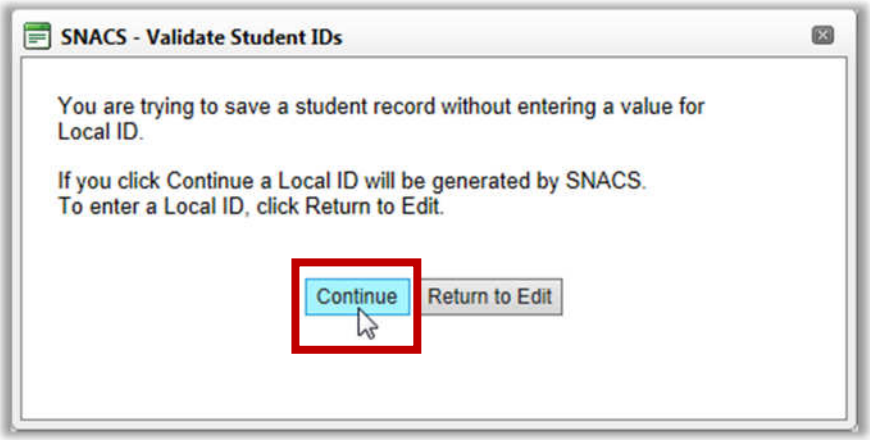


On the **Add New Student – Demographics** tab in the **Primary Guardian Information** group

- Enter primary guardian information.

On the **Add New Student – Demographics** tab in the **Secondary Guardian Information** group

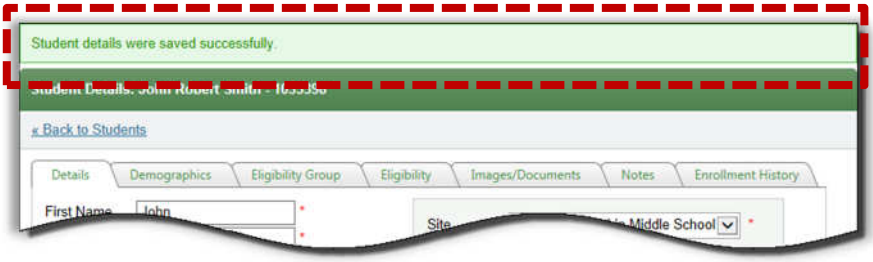
- Enter secondary guardian information, if available.
- Click Save .



If the Local ID is not entered, the **SNACS - Validate Student IDs** popup displays.

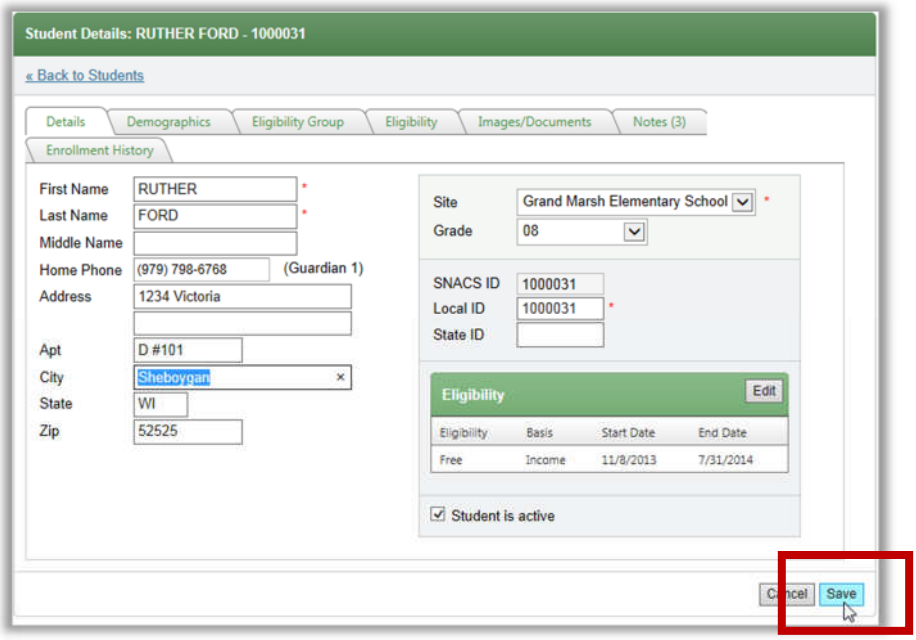
On the **SNACS - Validate Student IDs** popup, do one of

- Click Continue to use the SNACS ID as the Local ID, or
- Click Return to Edit to return to the **Add New Student** page and enter the Local ID.



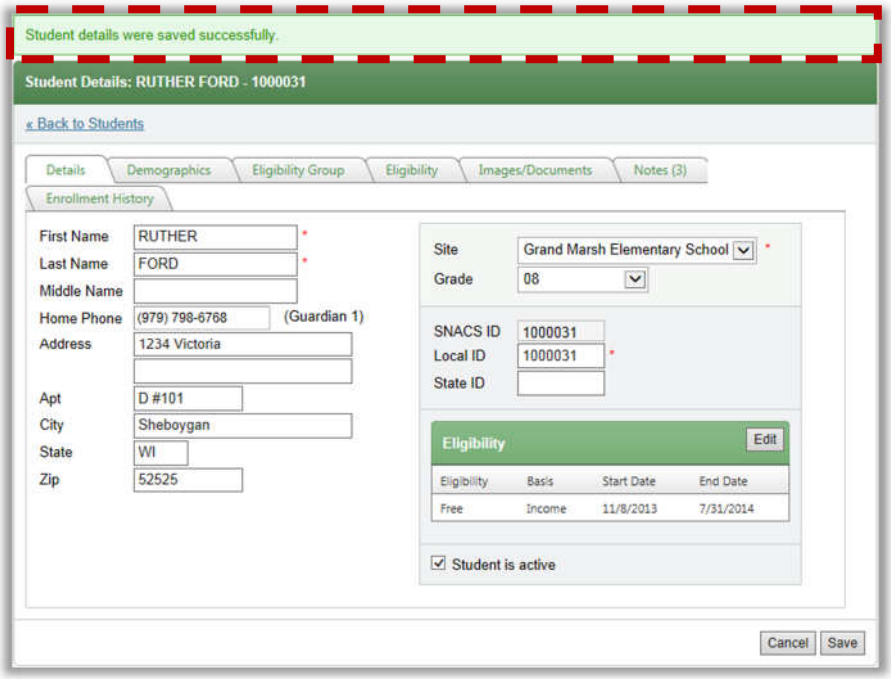
A save success message appears.

Updating a Student Record



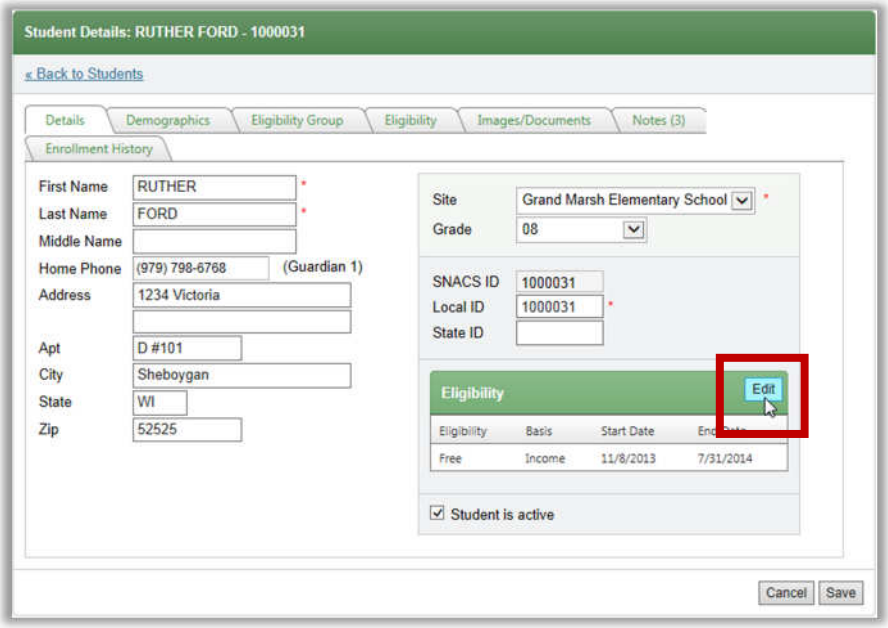
On any tab of a student record

- Make changes as needed.
- Click Save .



A success message appears.

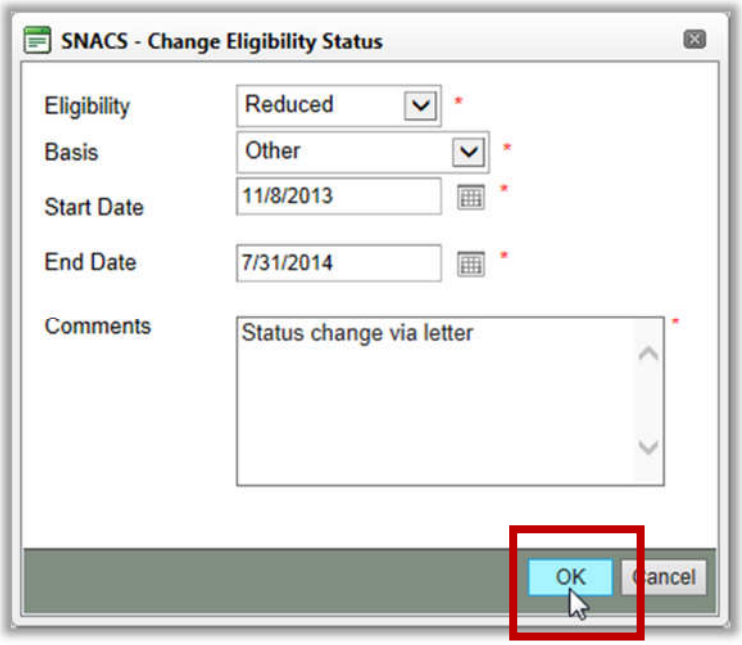
Changing Eligibility



On the **Details** tab of a student record in the **Eligibility** group

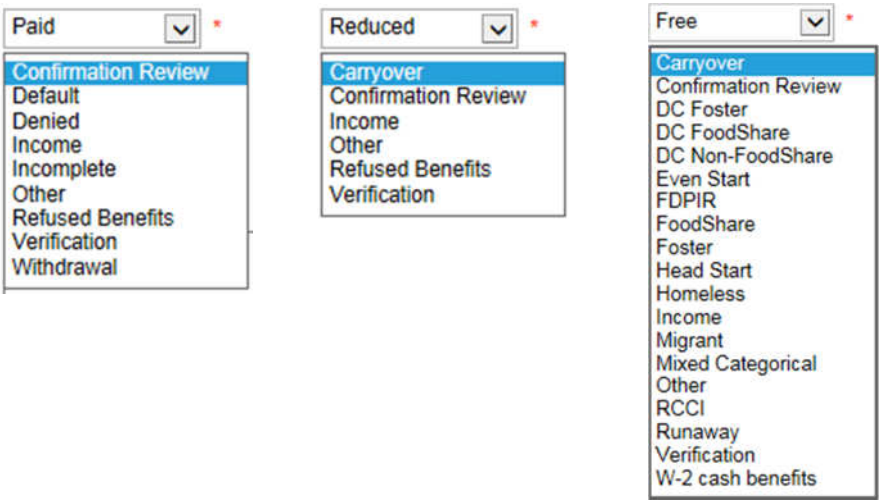
- Click Edit.

Note
Changing Eligibility directly on the student record is not recommended. Eligibility should come from processing.

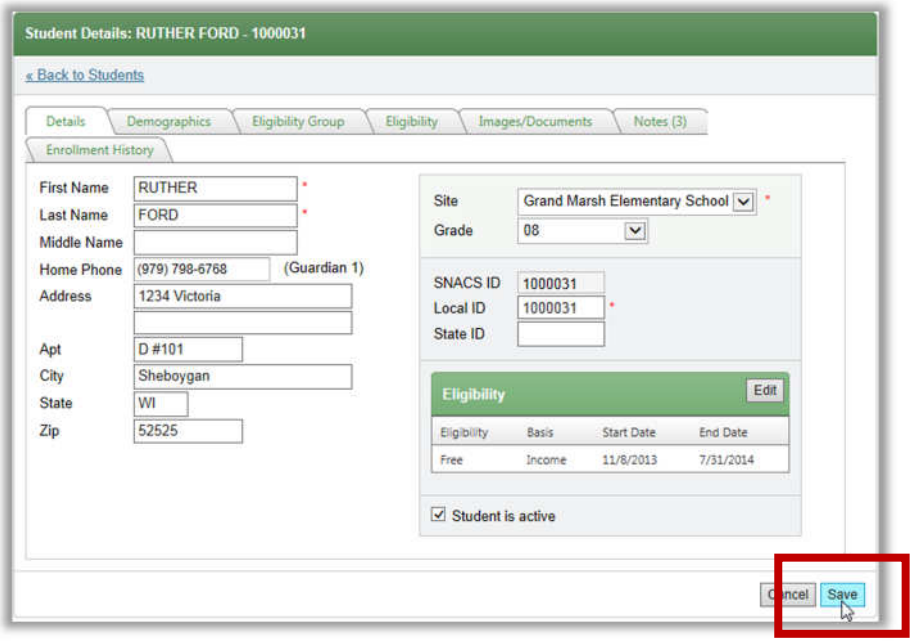


In the **Change Eligibility Status** popup

- In **Eligibility**, select the eligibility.
- In **Basis**, select a reason.
- In **Start Date**, enter or select a date on which the new eligibility begins.
- In **End Date**, enter or select a date on which the eligibility stops. By default, **End Date** is the last day of the Academic Year (plus the minimum grace period). Unless there is a specific reason to enter a different **End Date**, use the default.
- In **Comments**, enter comment text (**required**).
- Click OK.

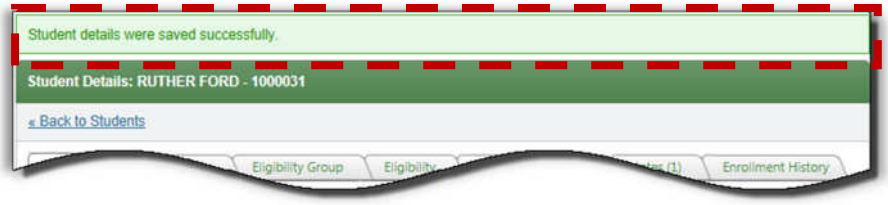


Available **Basis** for each **Eligibility** type are shown to the left.



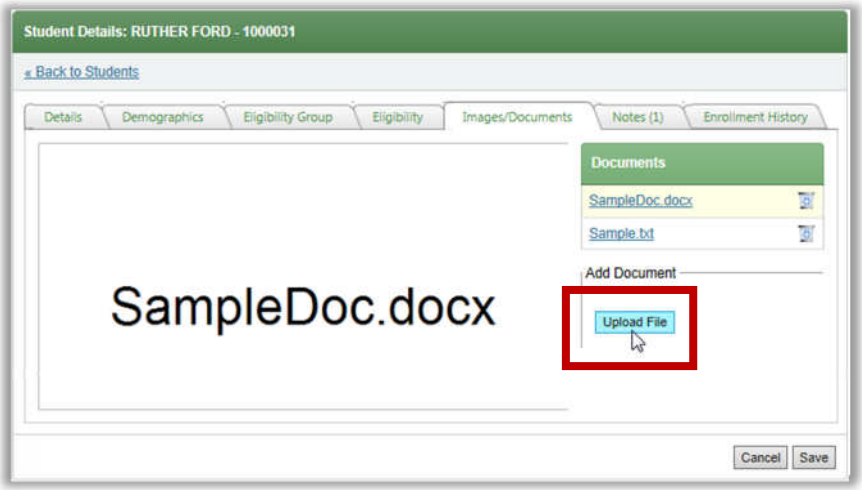
On the *Student Details* page

- Click Save .



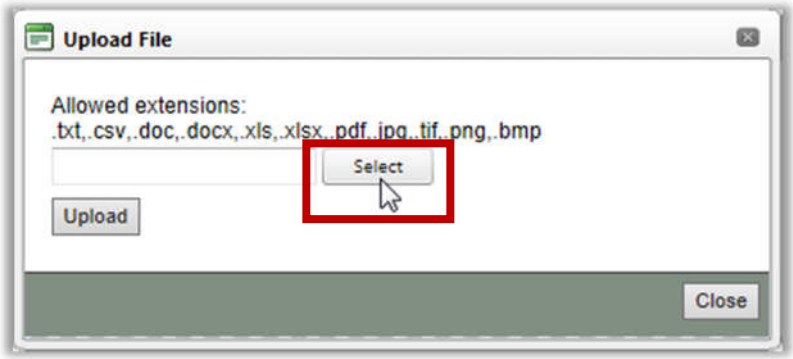
A success message appears.

Adding an Image / Document



On the **Images/Documents** tab

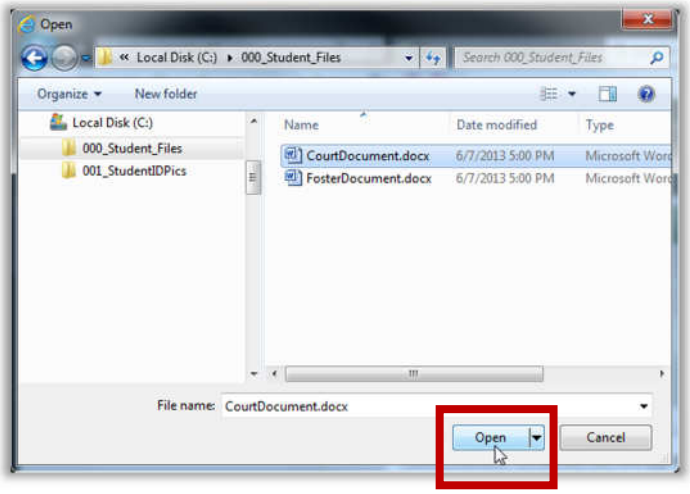
- Click Upload File .



In the *Upload File* popup

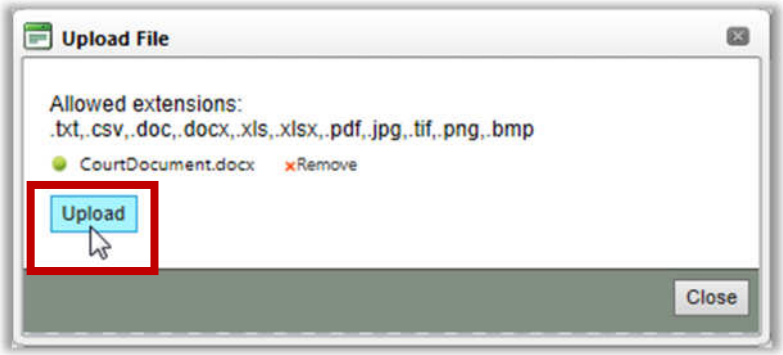
- Click Select and use standard Windows navigation techniques to select a picture file.
- Click Open .

Note
Pictures must be 50KB or smaller.



Use standard Windows navigation techniques to select a file.

- Click Open .

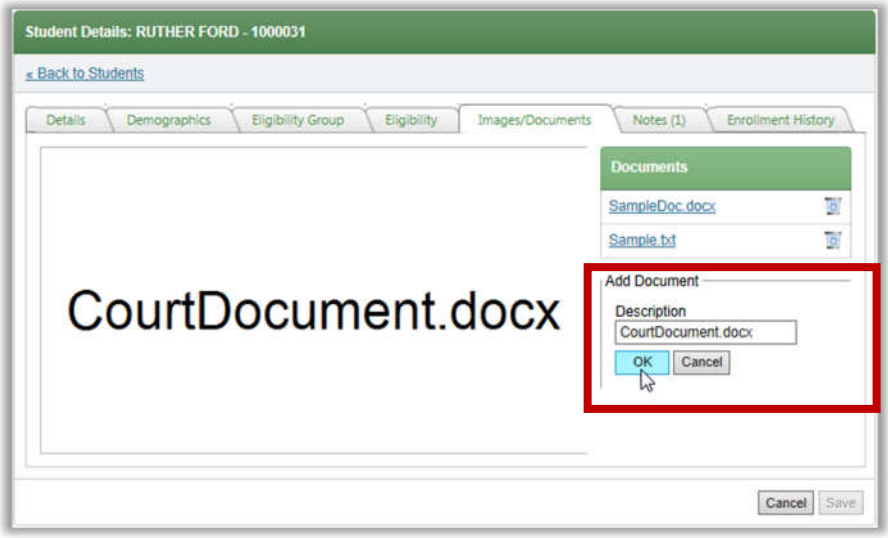


In the **Upload File** popup

- Click Upload .

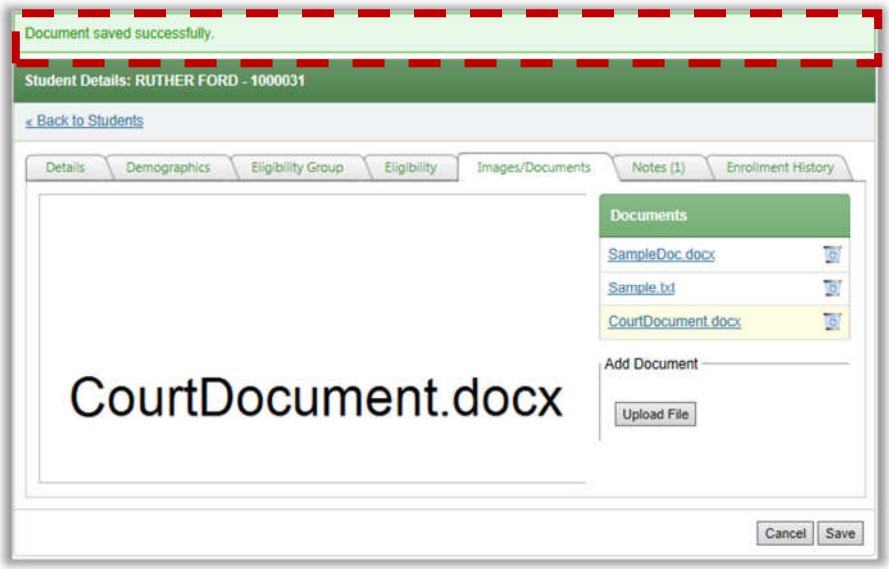
An image of the uploaded file or the filename appears.

- Click Save .



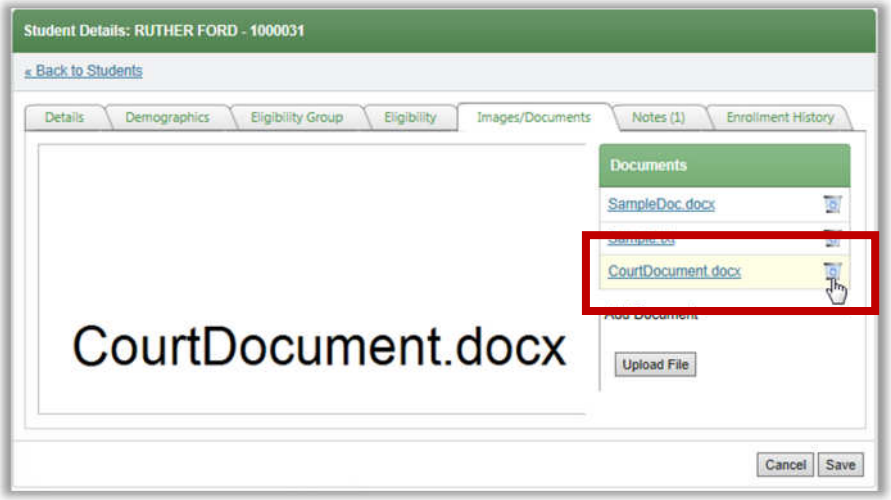
The selected document appears in the **Add Document** group.

- Click OK .



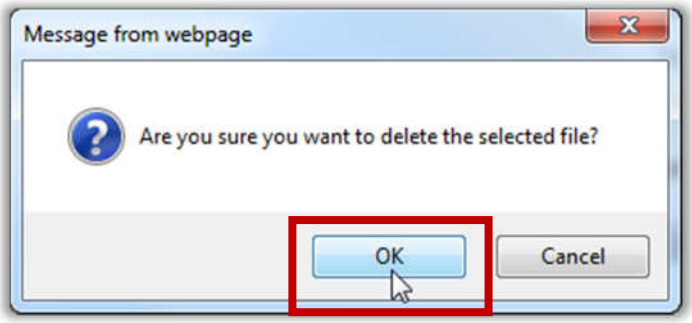
A success message appears. The new document appears in the **Documents** list.

Removing an Image / Document



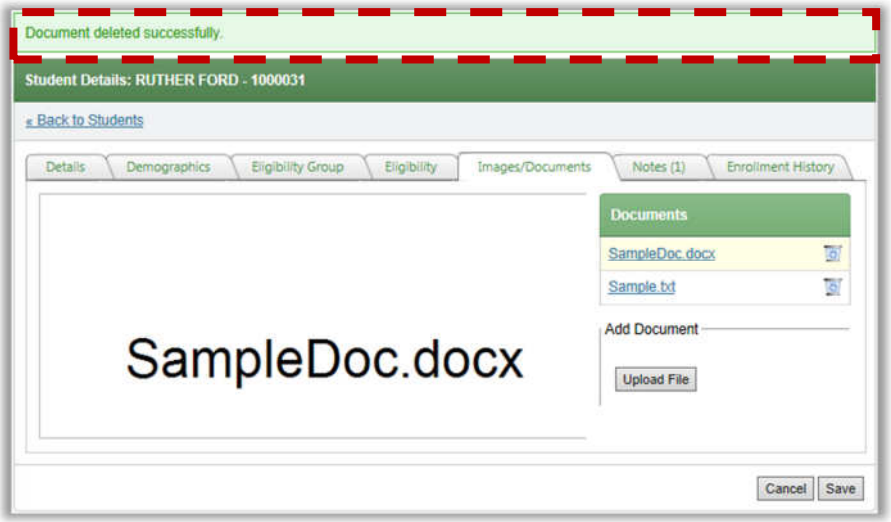
On the **Images/Documents** tab

- Click **Delete** ( ) in a document listing.



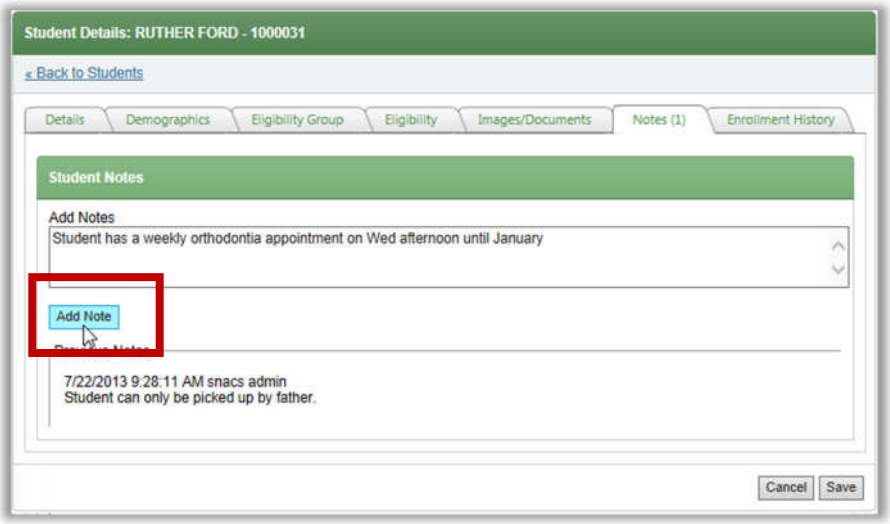
In the confirmation message

- Click OK .



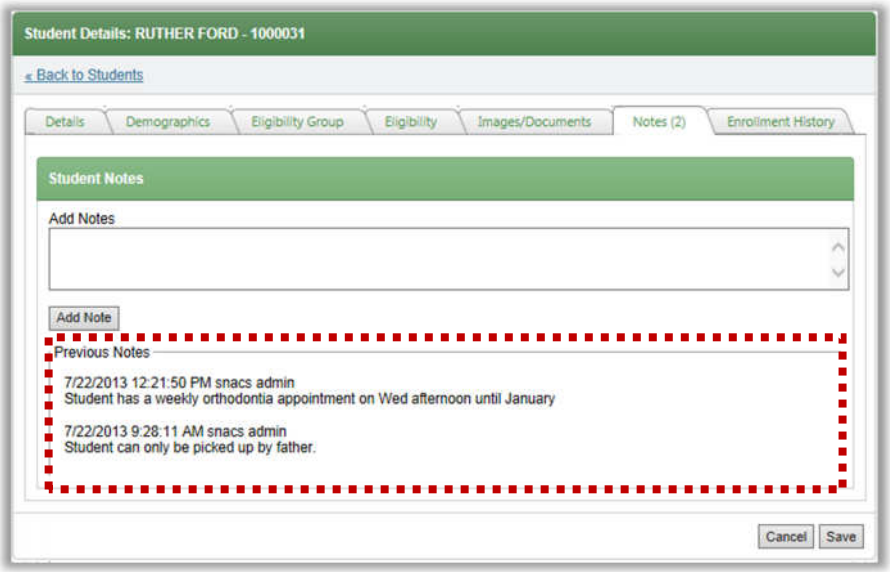
A delete success message appears.

Adding a Note



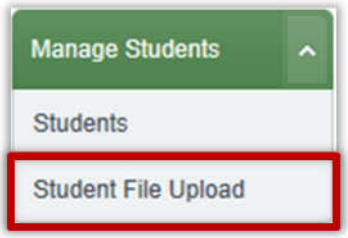
On the **Notes** tab

- Enter notes in **Add Notes**.
- Click Add Note .



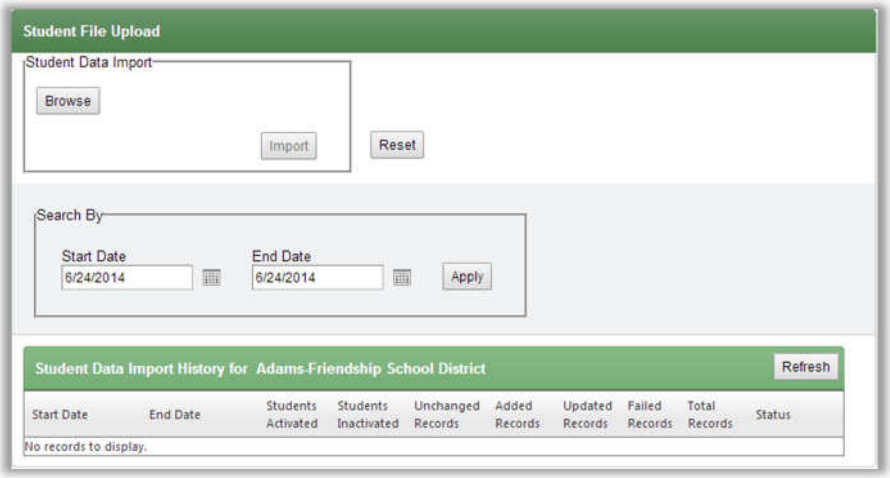
The new note appears in the **Previous Notes** group.

Student File Upload



The **Student File Upload** function:

- Uploads student records and applies updates to the database.
- Searches for import records.



By default, on the *Student File Upload* page

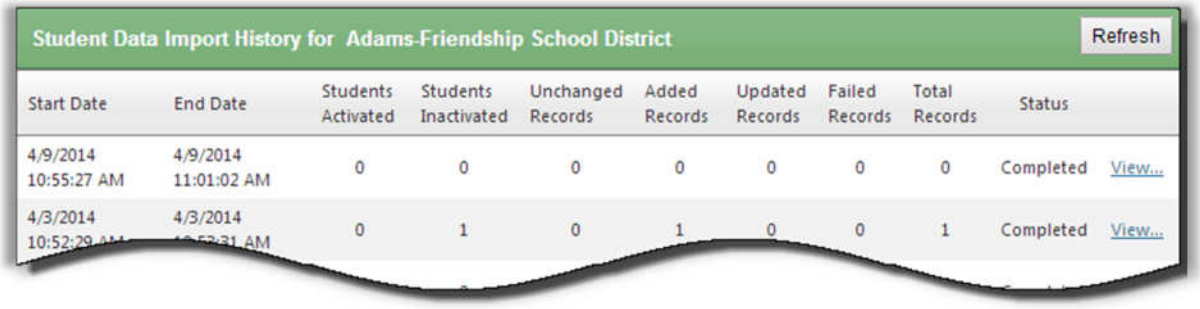
- **Start Date** and **End Date** are set to the current date.

Page Functions

Field/Button	Description
Apply	Click to list all import records that occur during the selected date range.
Browse	Click to select a student import file.
Import	Click to upload a student file.
Reset	Click to clear all selected search criteria.

Table 2.4 Student File Upload Page Functions

Listings: Student Data Import History

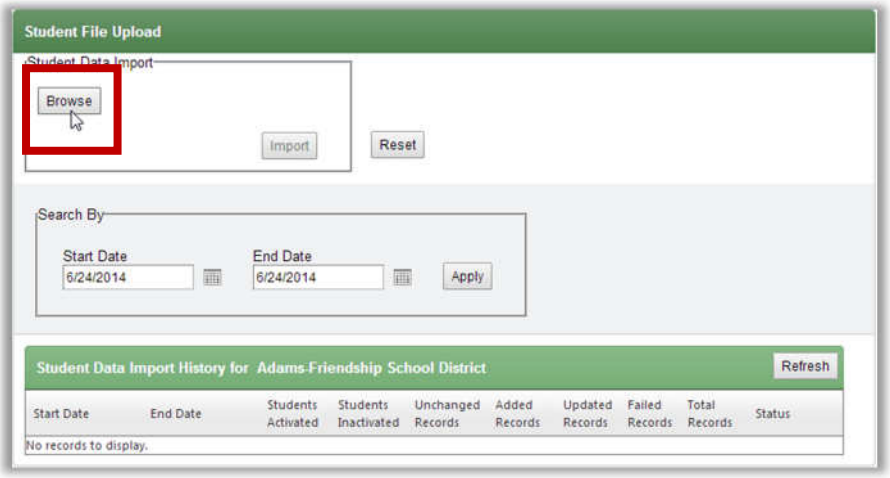


Each listing in **Student Data Import History** includes:

Header Name	Data Type	Description
Start Date	*View only*	*Sortable;* Date and time import was started.
End Date	*View only*	*Sortable;* Date and time import finished.
Student Activated	*View only*	*Sortable*; Number of student records that were made active.
Students Inactivated	*View only*	*Sortable*; Number of student records that were made inactive.
Unchanged Records	*View only*	*Sortable;* Number of student records that retained original status.
Added Records	*View only*	*Sortable*; Number of student records added to the student database.
Updated Records	*View only*	*Sortable*; Number of student records to which changes were made.
Failed Records	*View only*	*Sortable*; Total number of records in the import file that could not be processed.
Total Records	*View only*	*Sortable;* Total number of records updated from the import process.
Status	*View only*	*Sortable;* Completion status of the file import.
View . . .	***Clickable link***	Click to view file import details

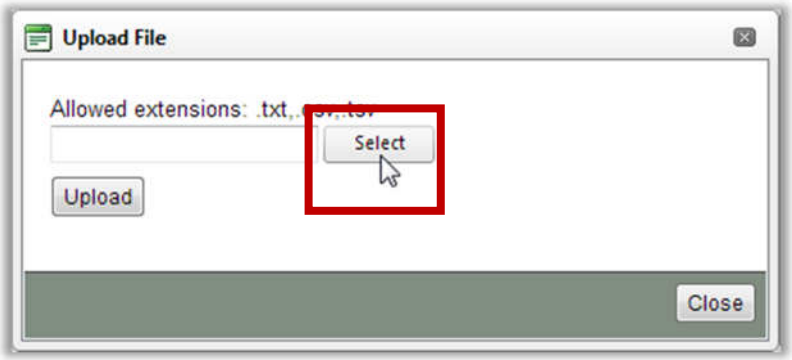
Table 2.5 Student Data Import History Listings

Uploading a Student File



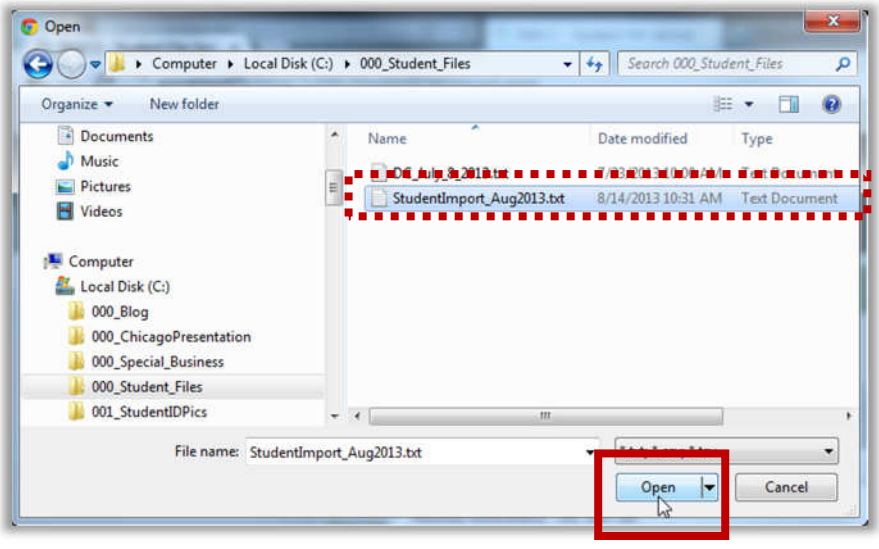
On the *Student File Upload* page

- Click Browse .



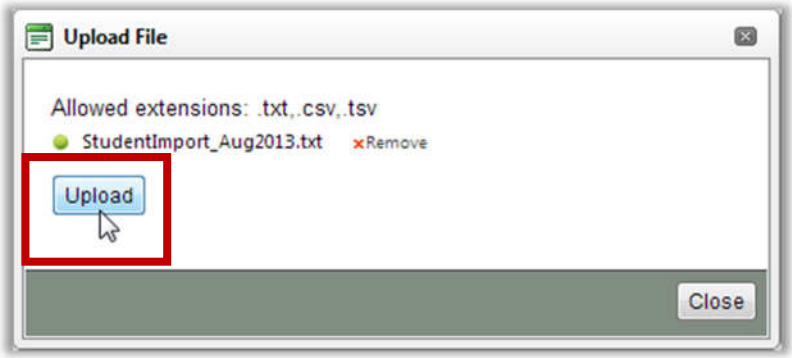
In the **Upload File** popup

- Click Select .



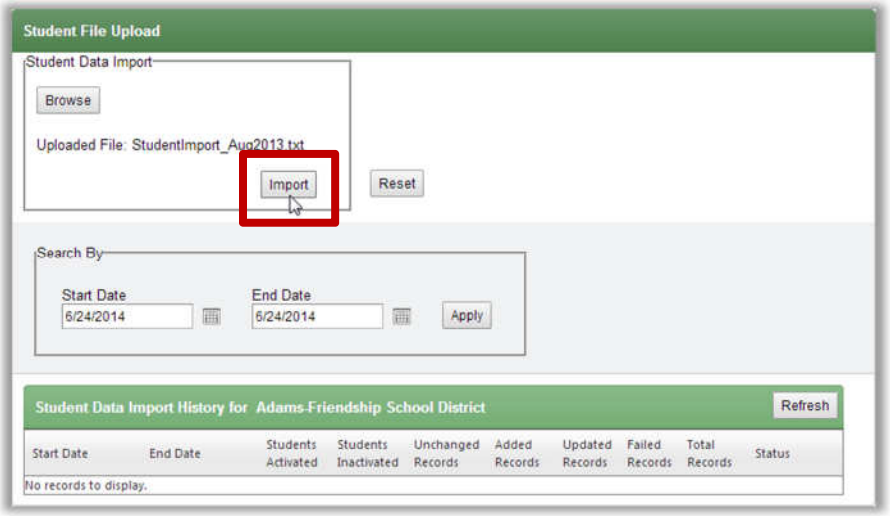
In the Windows **Open** popup

- Use standard Windows navigation techniques to find and select a file.
- Click Open .



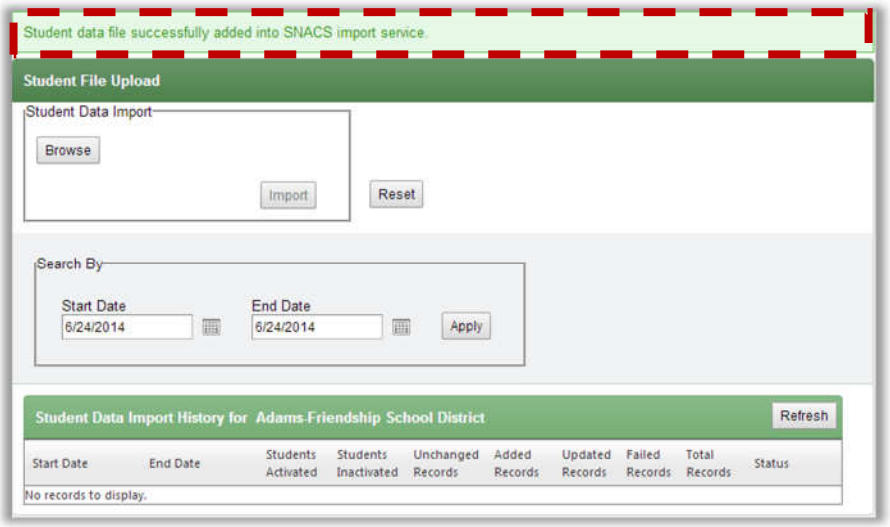
In the **Upload File** popup

- Click Upload .



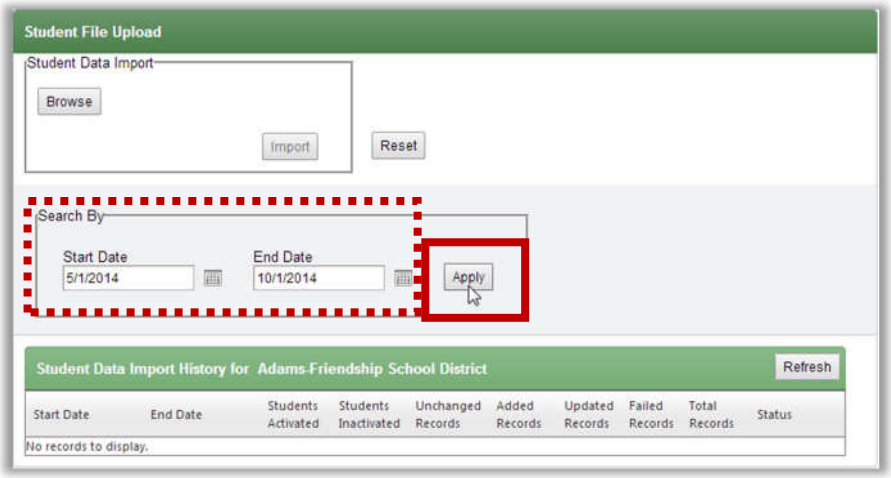
With the uploaded file name shown in the **Student Data Import History** group

- Click Import .



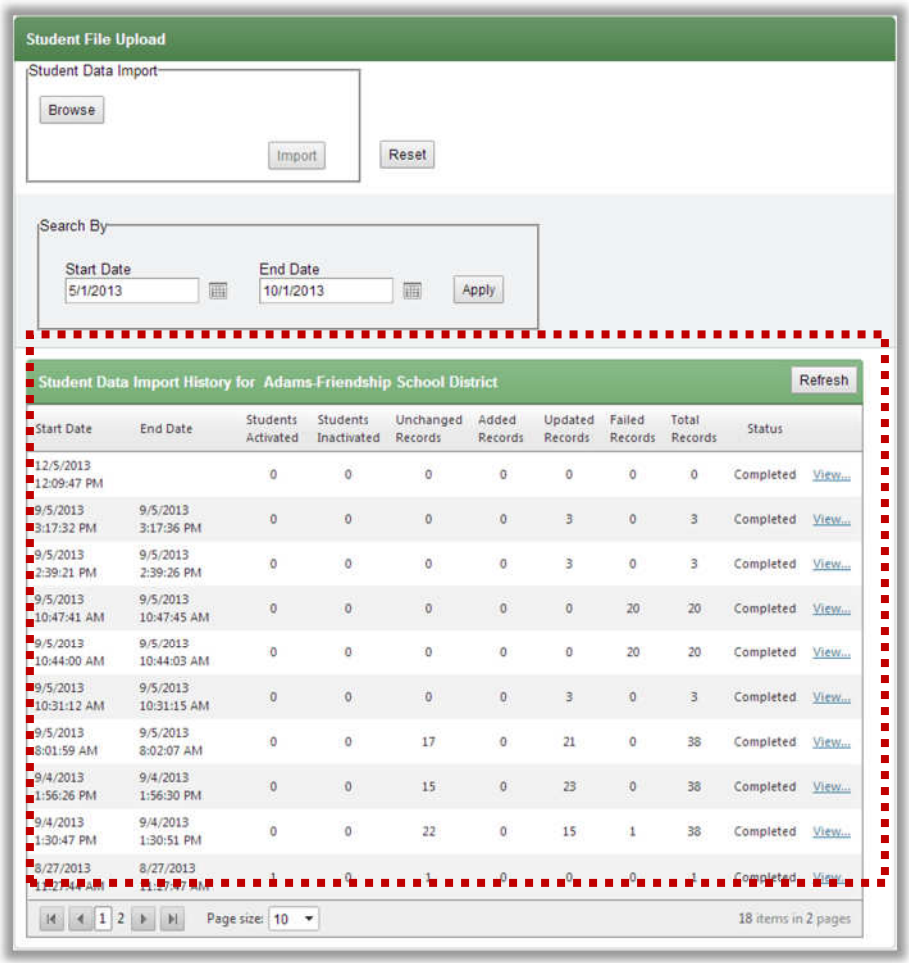
An add success message appears.

Searching for an Import Record



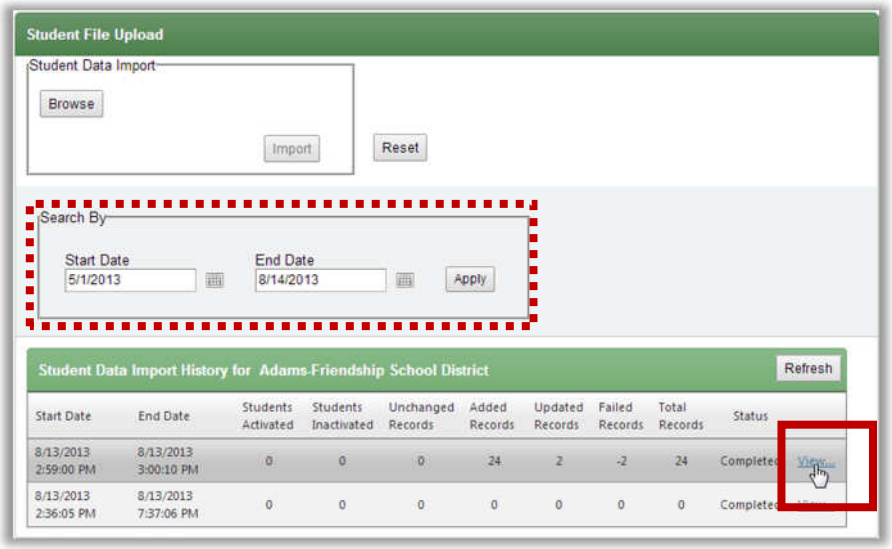
On the *Student File Upload* page

- Select a **Start Date**, if needed.
- Select an **End Date**, if needed.
- Click Apply .



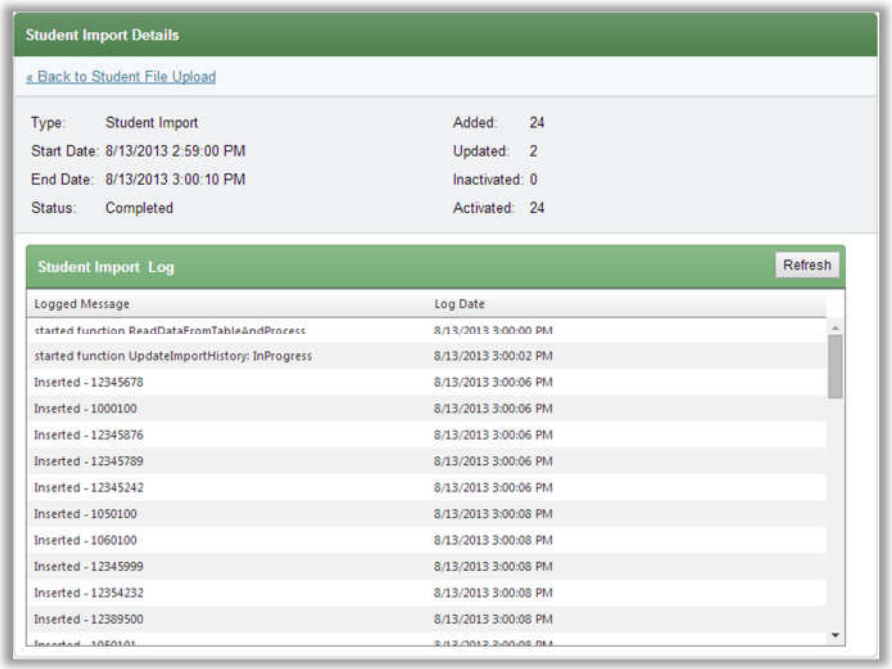
All file import records that meet the selected date range are shown in the **Student Data Import History** list.

Viewing Import Details



On the *Student File Upload* page

- Use Search By conditions to specify which import records to display.
- Click **View . . .** in an import record listing.

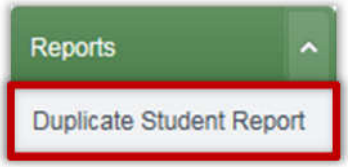


Import details are listed above the **Student Import** log.

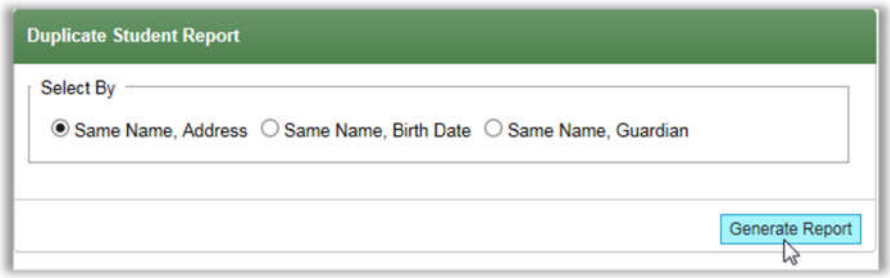
In the **Student Import Log** list

- Use the scroll bar to view record messages.
- Click on the column headers to sort log data.
- Click Refresh to update the import **Status** and to display all records in the import log.

Duplicate Student Report



The **Duplicate Student Report** lists possible duplications of student records. Duplication by Name and Address, or Name and Birth Date, or by Name and Guardian can be selected.



By default, on the *Duplicate Student Report* page

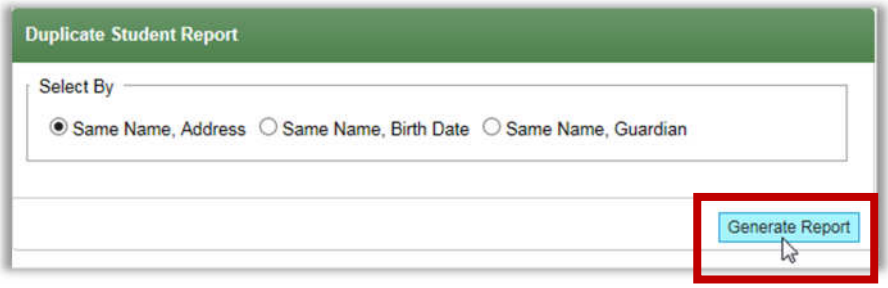
- **Select By** is set to "Same Name, Address" by default.

Page Functions

Field/Button	Description
Generate Report	Click to create report with selected data conditions.

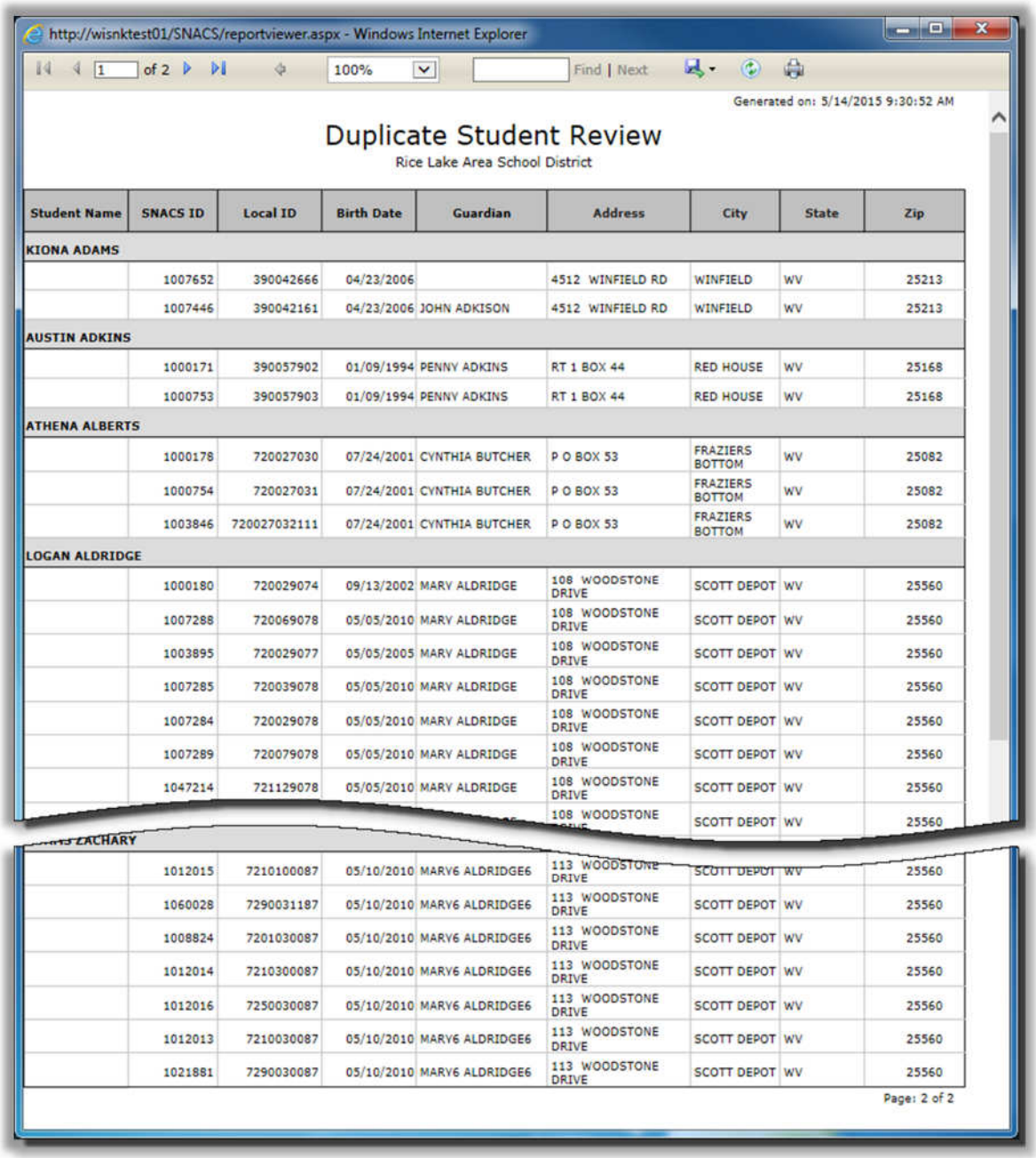
Table 2.6 Duplicate Student Report Page Functions

Generating a Duplicate Student Report



On the *Duplicate Student Report* page

- Select one **Select By** option.
- Click Generate Report .



Student Name	SNACS ID	Local ID	Birth Date	Guardian	Address	City	State	Zip
KIONA ADAMS								
	1007652	390042666	04/23/2006		4512 WINFIELD RD	WINFIELD	WV	25213
	1007446	390042161	04/23/2006	JOHN ADKISON	4512 WINFIELD RD	WINFIELD	WV	25213
AUSTIN ADKINS								
	1000171	390057902	01/09/1994	PENNY ADKINS	RT 1 BOX 44	RED HOUSE	WV	25168
	1000753	390057903	01/09/1994	PENNY ADKINS	RT 1 BOX 44	RED HOUSE	WV	25168
ATHENA ALBERTS								
	1000178	720027030	07/24/2001	CYNTHIA BUTCHER	P O BOX 53	FRAZIERS BOTTOM	WV	25082
	1000754	720027031	07/24/2001	CYNTHIA BUTCHER	P O BOX 53	FRAZIERS BOTTOM	WV	25082
	1003846	720027032111	07/24/2001	CYNTHIA BUTCHER	P O BOX 53	FRAZIERS BOTTOM	WV	25082
LOGAN ALDRIDGE								
	1000180	720029074	09/13/2002	MARY ALDRIDGE	108 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
	1007288	720069078	05/05/2010	MARY ALDRIDGE	108 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
	1003895	720029077	05/05/2005	MARY ALDRIDGE	108 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
	1007285	720039078	05/05/2010	MARY ALDRIDGE	108 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
	1007284	720029078	05/05/2010	MARY ALDRIDGE	108 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
	1007289	720079078	05/05/2010	MARY ALDRIDGE	108 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
	1047214	721129078	05/05/2010	MARY ALDRIDGE	108 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
					108 WOODSTONE	SCOTT DEPOT	WV	25560
ZACHARY								
	1012015	7210100087	05/10/2010	MARV6 ALDRIDGE6	113 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
	1060028	7290031187	05/10/2010	MARV6 ALDRIDGE6	113 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
	1008824	7201030087	05/10/2010	MARV6 ALDRIDGE6	113 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
	1012014	7210300087	05/10/2010	MARV6 ALDRIDGE6	113 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
	1012016	7250030087	05/10/2010	MARV6 ALDRIDGE6	113 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
	1012013	7210030087	05/10/2010	MARV6 ALDRIDGE6	113 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560
	1021881	7290030087	05/10/2010	MARV6 ALDRIDGE6	113 WOODSTONE DRIVE	SCOTT DEPOT	WV	25560

Chapter 3: Counting and Claiming—Eligibility Summary

In this chapter you will learn how to

- ✓ Upload a file of student eligibility data.
- ✓ Generate a list of all eligibility changes for a selected time period.

Eligibility Summary at a Glance

Menu Selection	Description
Upload File	Import a file with student eligibility data.
View Eligibility Summary	Generate the Eligibility Summary report with all eligibility changes for a selected month or date range.

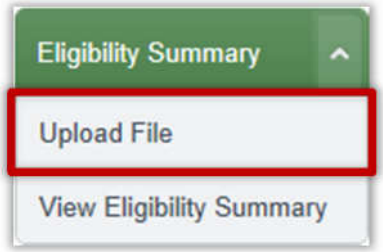
Table 3.1 Eligibility Summary Menu Selections

Note
Categories and menu selections to which you have access in SNACS are those appropriate for your assigned role(s). When you access the **Eligibility Summary** menu, you may see a subset of the menu selections listed above.

You may or may not see **Upload File** on the Eligibility Summary menu.

If your site is processing applications or certifications through SNACS procedures, **do not use** the **Upload File** function. Doing so overwrites the application or certification processing completed by SNACS.

Upload File

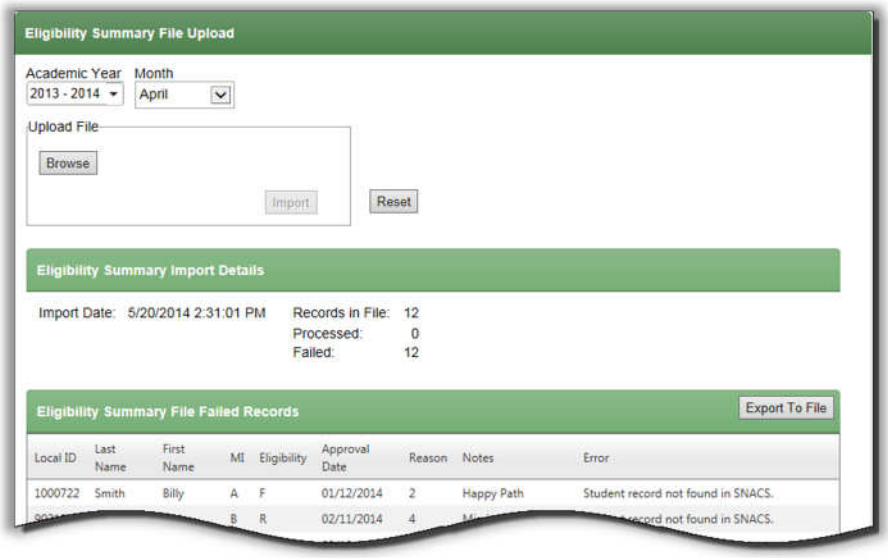


Upload File imports a file with student eligibility data.

When a record fails to upload and process, a failure listing appears with the reason for failure.

You may or may not see **Upload File** on the Eligibility Summary menu.

If your site is processing applications or certifications through SNACS procedures, **do not use** the **Upload File** function. Doing so overwrites the application or certification processing completed by SNACS.



By default, on the *Upload File* page

- **Academic Year** is set to the current year.
- **Month** is the current month.

Import Details group displays the results of the import.

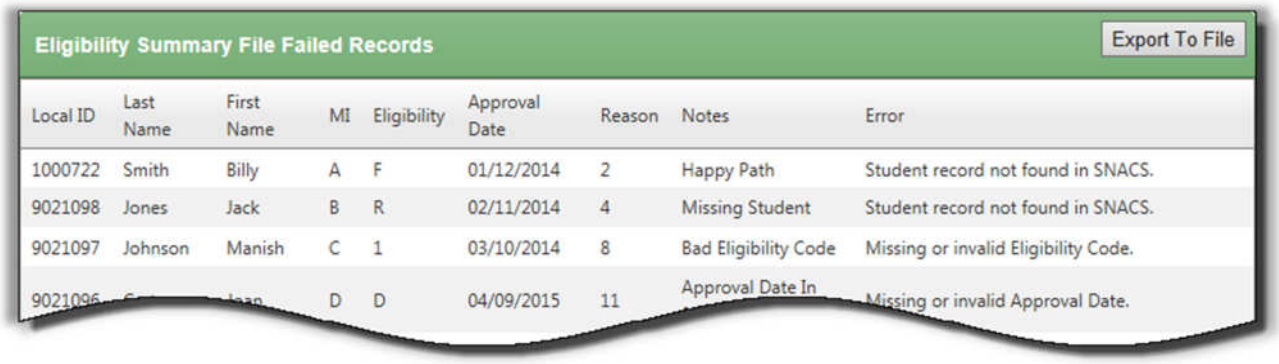
Failed Records group displays each failed record and the reason for the processing failure.

Page Functions

Field/Button	Description
Browse	Click to display the **Upload File** popup to select a file for upload.
Import	Click to import a selected file.
Reset	Click to clear all selections, import details and failed record listings, and return default settings.
Export To File	Click to export the failed records listed in the grid as a text file.

Table 3.2 Upload File Page Functions

Listings: Eligibility Summary File Failed Records



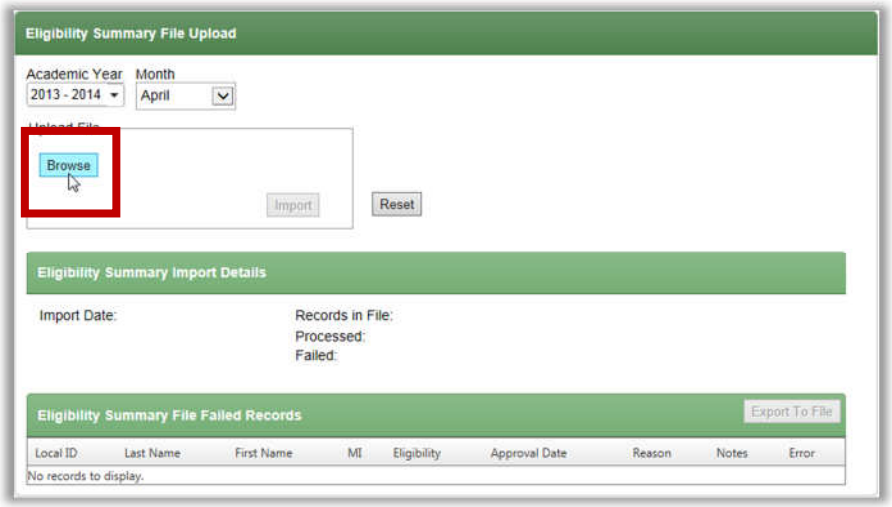
Each listing in **Eligibility Summary File Failed Records** includes:

Header Name	Data Type	Description
Local ID	*View only*	Student's district ID
Last Name	*View only*	Student's last name
First Name	*View only*	Student's first name
MI	*View only*	Student's middle name initial
Eligibility	*View only*	Assigned benefit eligibility
Approval Date	*View only*	Date on which eligibility was assigned

Header Name	Data Type	Description
Reason	*View only*	Code for benefit eligibility assignment
Notes	*View only*	Text included in Notes column of import file
Error	*View only*	Processing-failure reason

Table 3.3 Eligibility Summary File Failed Records Listings

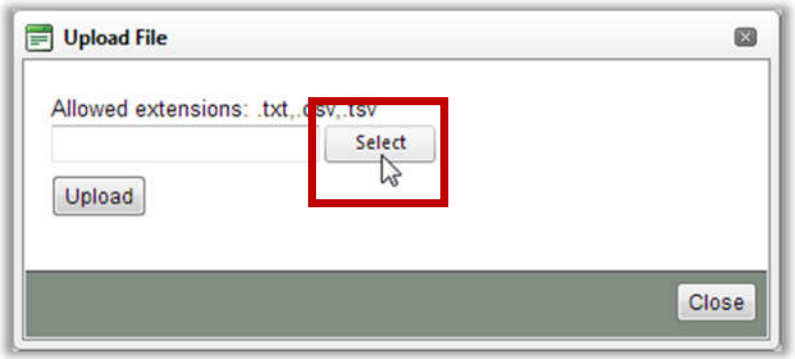
Uploading an Eligibility Summary file



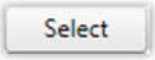
On the *Student File Upload* page

- Select an **Academic Year** and **Month**.
- Click

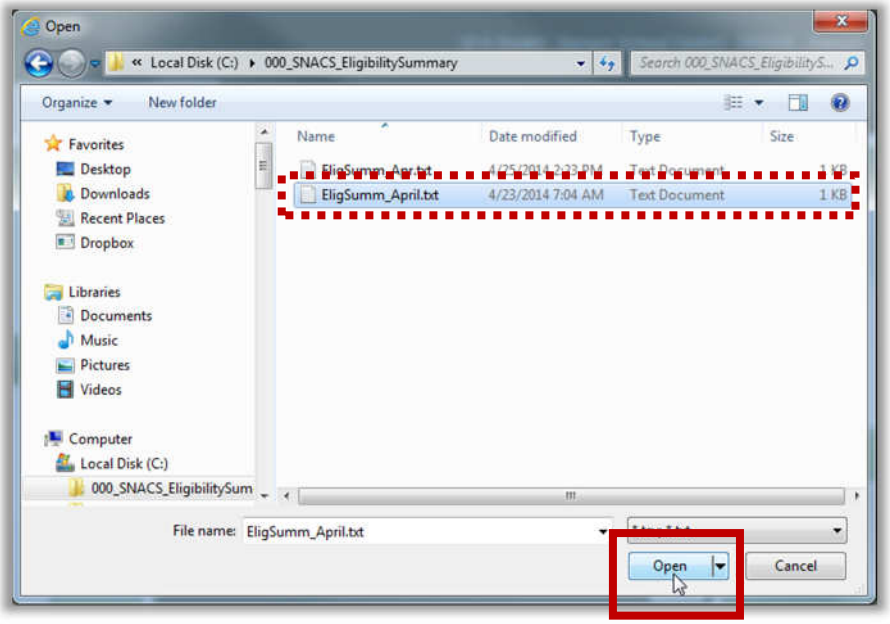
.



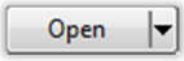
In the **Upload File** popup

- Click 

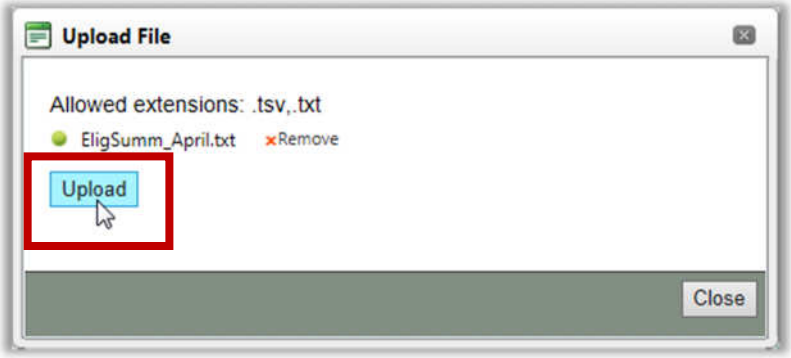
.



In the Windows **Open** popup

- Use standard Windows navigation techniques to find and select a file.
- Click 

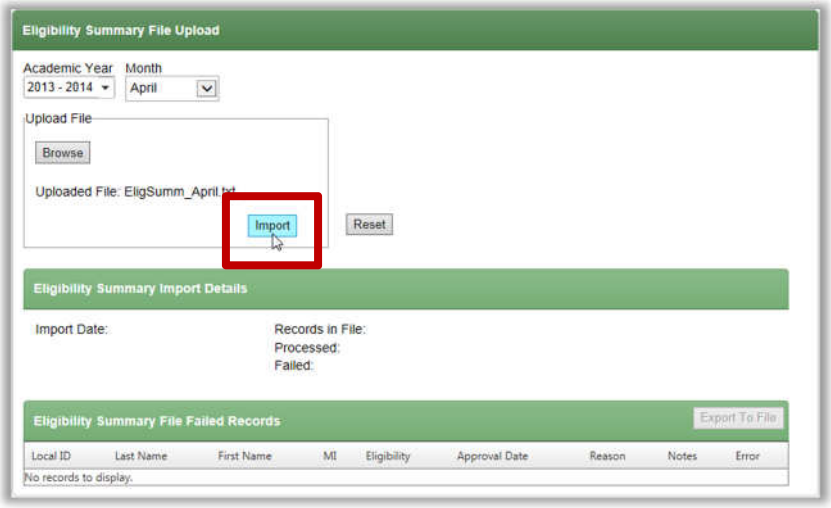
.



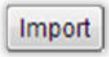
In the **Upload File** popup

- Click

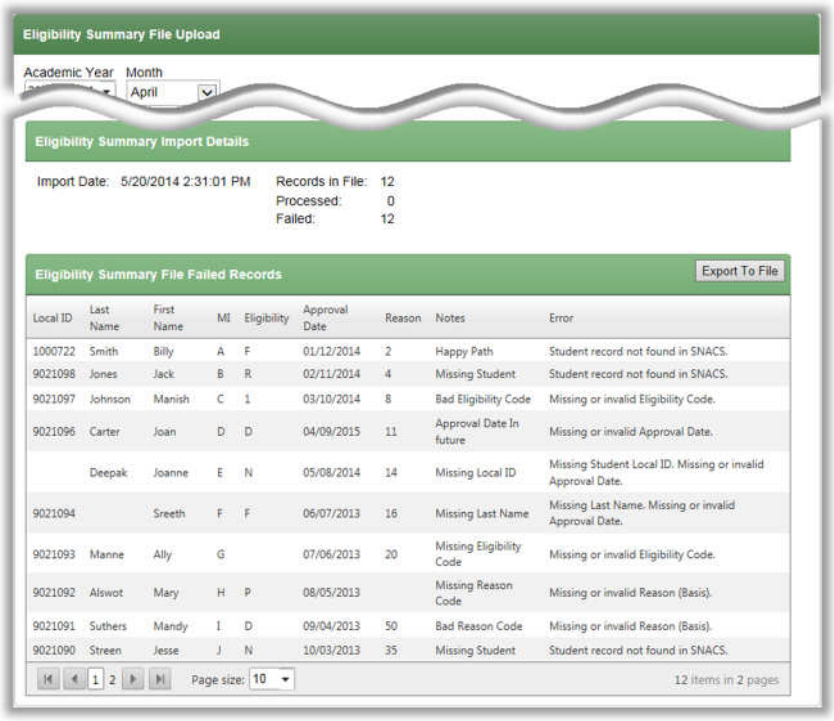
.



With the uploaded file name shown in the **Upload File** group

- Click 

.

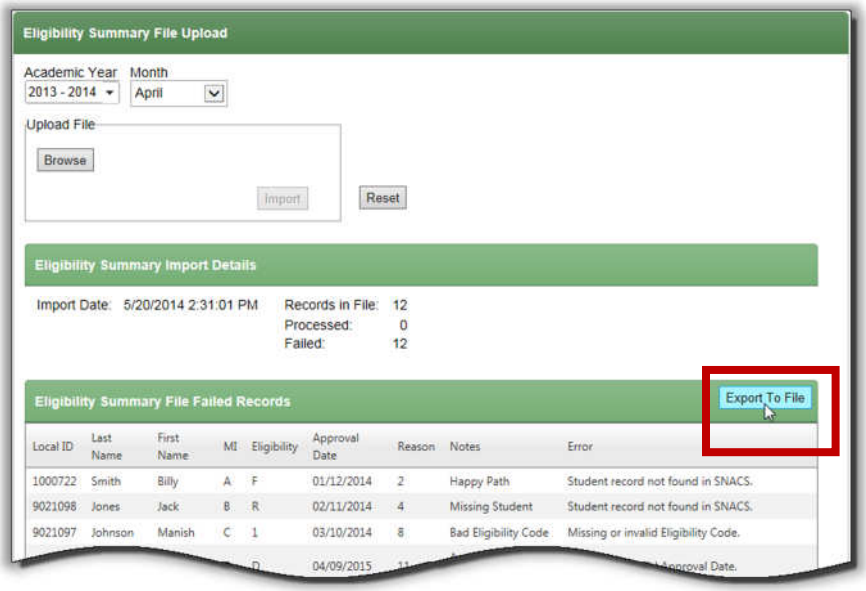


Processed and failed record totals are shown in the Import Details group.

A one-line listing appears in the Failed Records group for each record that failed to upload and process. Error reason(s) are listed for each failed record.

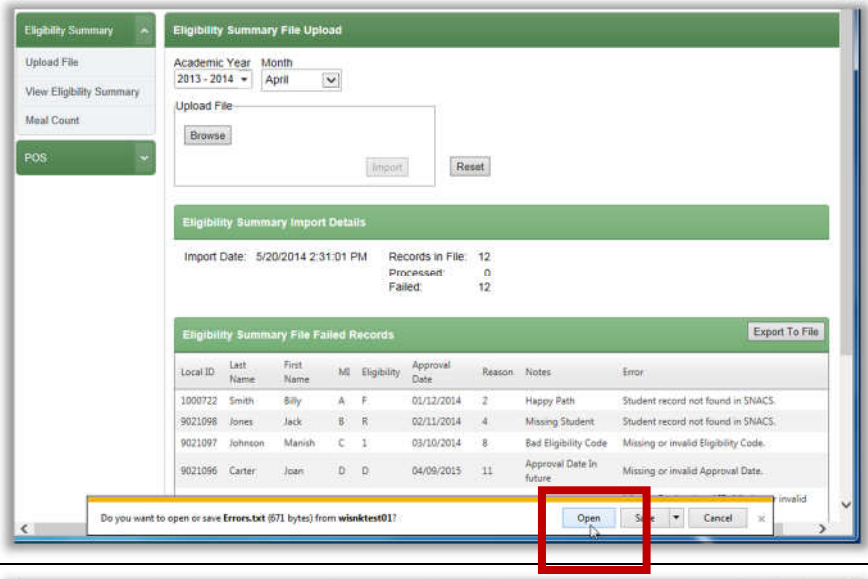
Use the page controls to move between pages of failed records, if needed.

Exporting Failed Records to a Text File



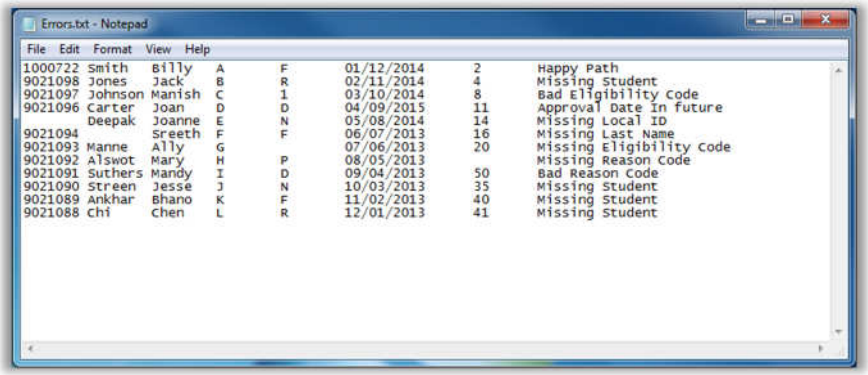
With a listing of failed records on display

- Click Export To File .



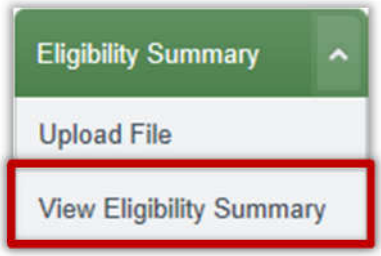
In the **Open / Save** popup message

- Click Open .



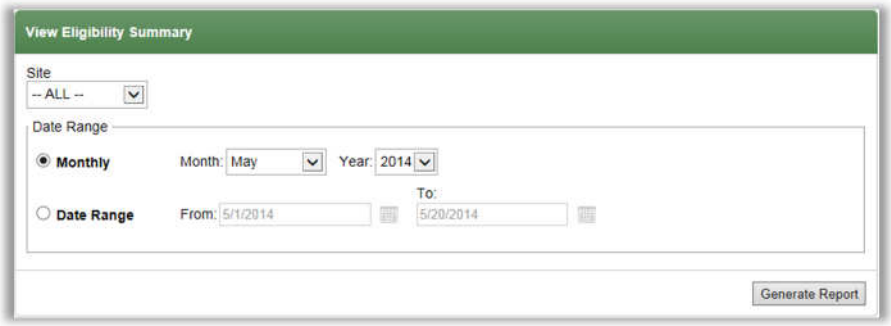
A text file with the failed record listings appears.

View Eligibility Summary



View Eligibility Summary generates the Eligibility Summary report.

The Eligibility Summary report includes all eligibility changes for each Student ID within a selected month or date range.



By default, on the *View Eligibility Summary* page

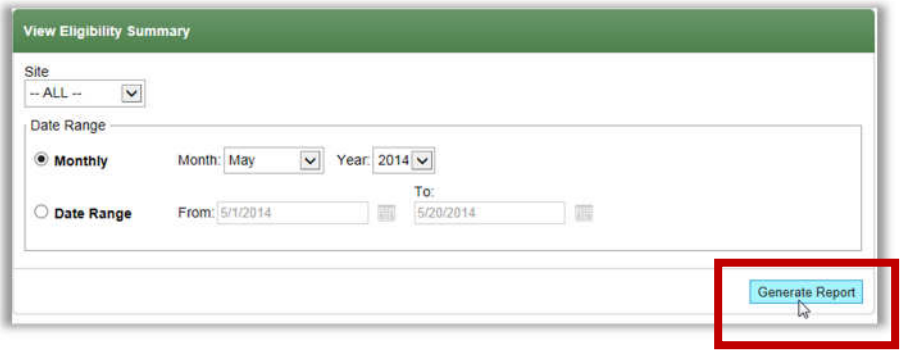
- **Site Name** is set to "—ALL—".
- **Date Range** is set to "Monthly" with the current month and year selected.

Page Functions

Field/Button	Description
Generate Report	Click to generate the Eligibility Summary report.

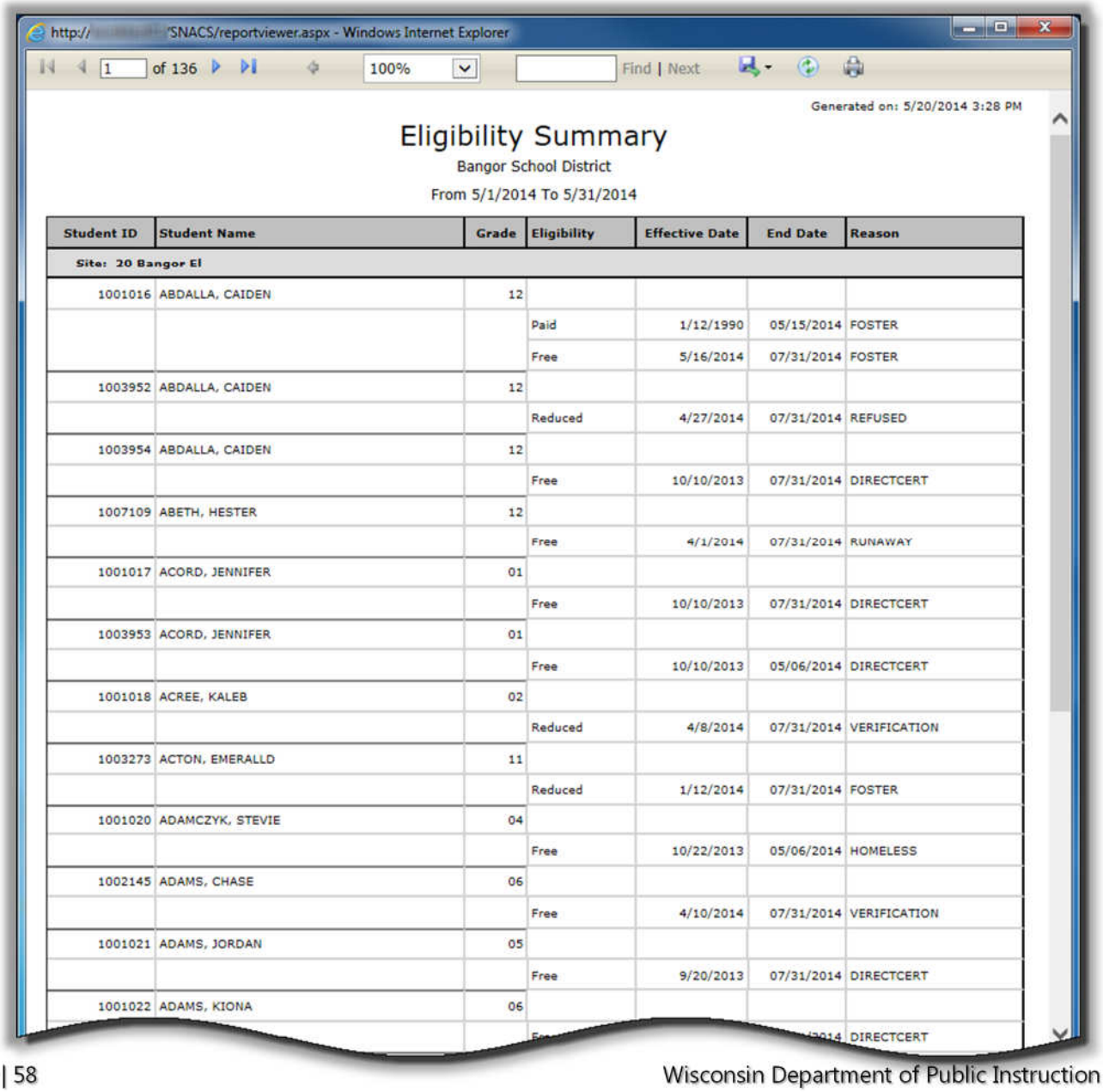
Table 3.4 View Eligibility Summary Page Functions

Generating the Eligibility Summary Report



On the *View Eligibility Summary* page

- Select a **Site** or accept "—ALL—" to include all sites.
- Select a date range in the **Date Range** group.
- Click Generate Report.



Student ID	Student Name	Grade	Eligibility	Effective Date	End Date	Reason
Site: 20 Bangor El						
1001016	ABDALLA, CAIDEN	12				
			Paid	1/12/1990	05/15/2014	FOSTER
			Free	5/16/2014	07/31/2014	FOSTER
1003952	ABDALLA, CAIDEN	12				
			Reduced	4/27/2014	07/31/2014	REFUSED
1003954	ABDALLA, CAIDEN	12				
			Free	10/10/2013	07/31/2014	DIRECTCERT
1007109	ABETH, HESTER	12				
			Free	4/1/2014	07/31/2014	RUNAWAY
1001017	ACORD, JENNIFER	01				
			Free	10/10/2013	07/31/2014	DIRECTCERT
1003953	ACORD, JENNIFER	01				
			Free	10/10/2013	05/06/2014	DIRECTCERT
1001018	ACREE, KALEB	02				
			Reduced	4/8/2014	07/31/2014	VERIFICATION
1003273	ACTON, EMERALLD	11				
			Reduced	1/12/2014	07/31/2014	FOSTER
1001020	ADAMCZYK, STEVIE	04				
			Free	10/22/2013	05/06/2014	HOMELESS
1002145	ADAMS, CHASE	06				
			Free	4/10/2014	07/31/2014	VERIFICATION
1001021	ADAMS, JORDAN	05				
			Free	9/20/2013	07/31/2014	DIRECTCERT
1001022	ADAMS, KIONA	06				
						DIRECTCERT

End of Chapter

Chapter 4:
Counting and Claiming—POS

In this chapter you will learn how to

- ✓ Upload a file with student meal records.
- ✓ Generate a list of all meal items sold.
- ✓ Generate a list of meal counts.

POS at a Glance

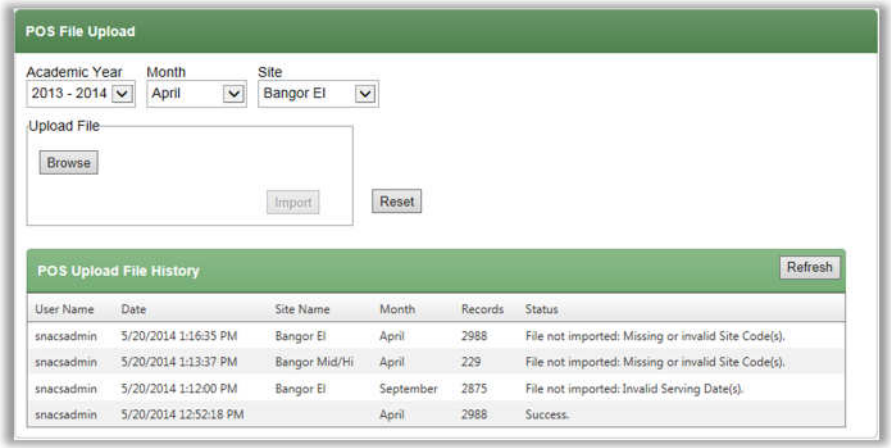
Menu Selection	Description
Upload File	Import all records from a file with student meal records.
Student Meals	Generate a list of all meal items sold for a selected date, month or date range.
Meal Count	Generate a list of meal counts for a selected date, month or date range; summary or detailed report available.
Remove Meals	

Table 4.1 POS Menu Selections

Note
Categories and menu selections to which you have access in SNACS are those appropriate for your assigned role(s). When you access the **POS** menu, you may see a subset of the menu selections listed above.

Upload File

Upload File imports and saves POS transaction data from an upload file.



By default, on the *POS File Upload* page

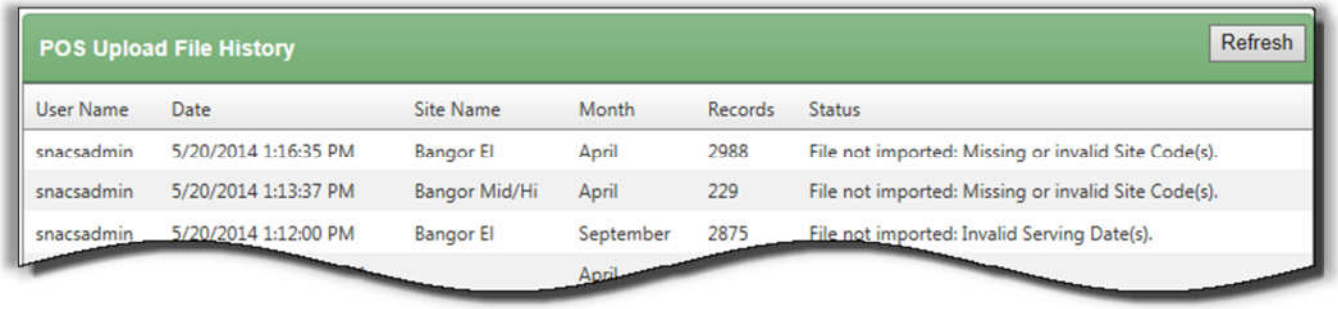
- **Academic Year** is set to the current year.
- **Month** is the current month.
- **Site** displays "—ALL—".

Page Functions

Field/Button	Description
Browse	Click to display the **Upload File** popup; use the **Upload File** popup to select a file for upload.
Import	Click to import a selected file.
Reset	Click to clear all selections and return default settings.
Refresh	Click to display the most current history data for POS Upload File.

Table 4.2 POS File Upload Page Functions

Listings: POS Upload File History

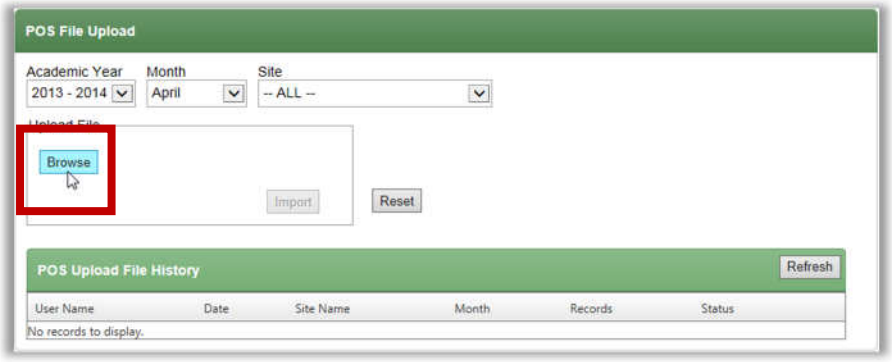


Each listing in **POS Upload File History** includes:

Header Name	Data Type	Description
User Name	*View only*	Name of user who started the import job.
Date	*View only*	Date and time import finished.
Site Name	*View only*	Name of site to which imported data applies.
Month	*View only*	Serving month of imported data.
Records	*View only*	Number of records in the file.
Status	*View only*	File import status; lists error messages.

Table 4.3 POS Upload File History Listings

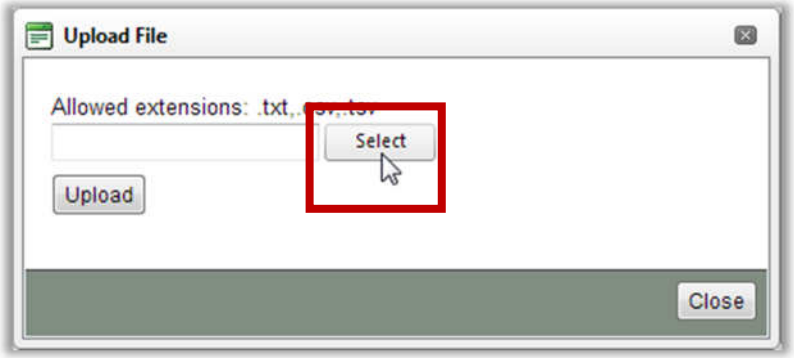
Uploading a POS file



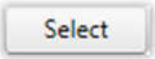
On the *Student File Upload* page

- Select an **Academic Year**, **Month**, and **Site**.
- Click

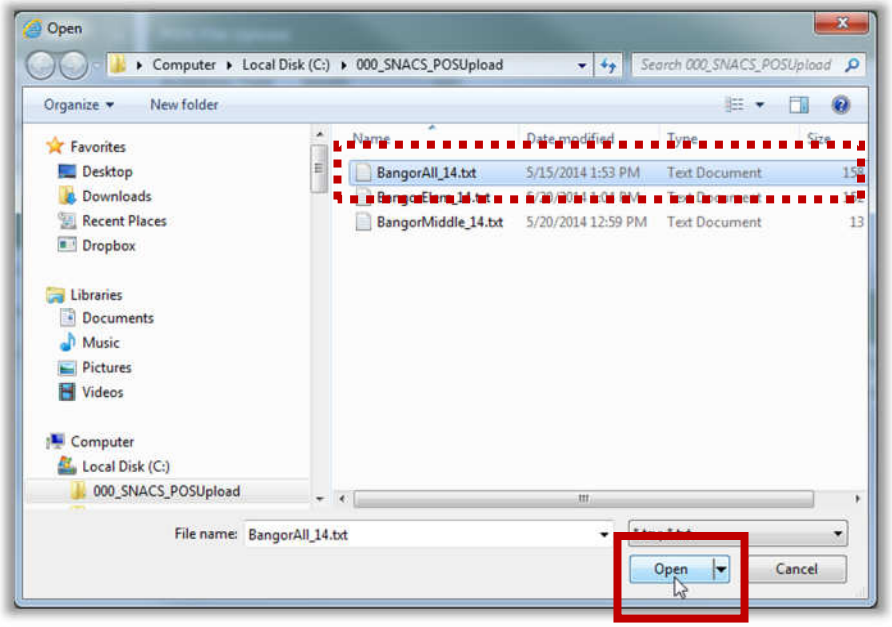
.



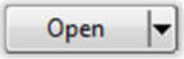
In the **Upload File** popup

- Click 

.



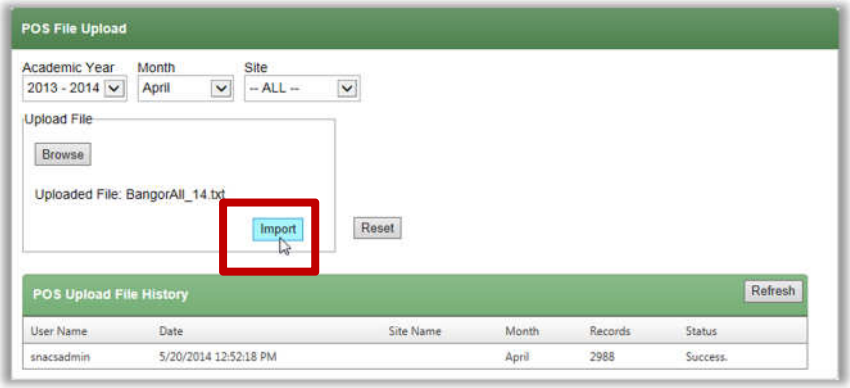
In the Windows **Open** popup

- Use standard Windows navigation techniques to find and select a file.
- Click 

.

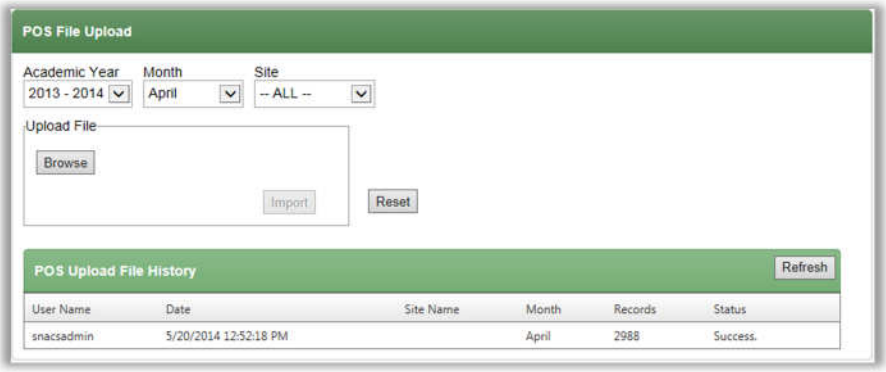
In the **Upload File** popup

- Click Upload .



With the uploaded file name shown in the **Upload File** group

- Click Import .



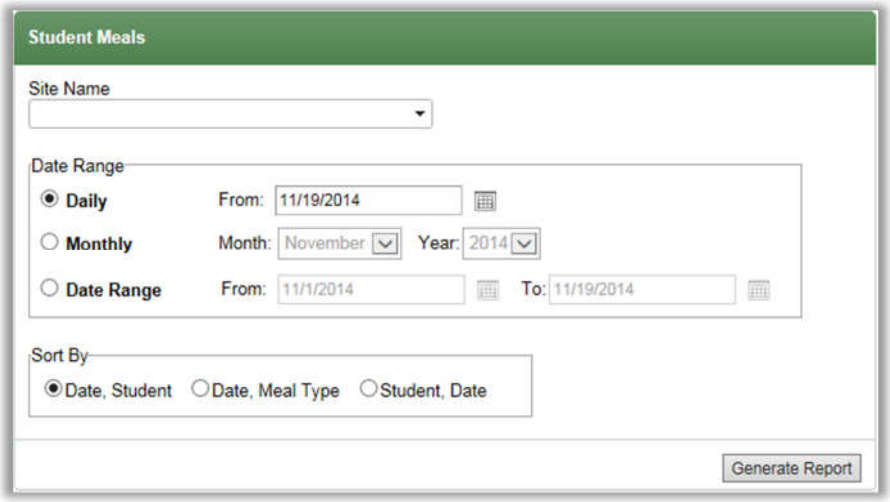
A one-line history listing appears with the status of the file upload.

Student Meals (Report)

Student Meals generates the Student Meals report for a selected site for a date, month, or date range.

The Student Meals report includes all imported POS transactions for the selected date/date range; each listing includes

- Transaction Date
- Local Student ID
- Name
- Grade
- Item
- POS Eligibility



By default, on the *Student Meals* page

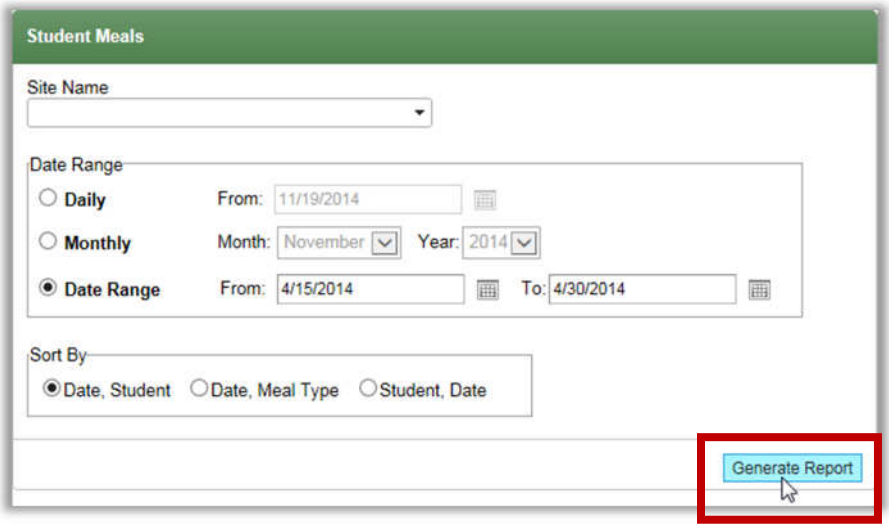
- **Site Name** is blank.
- **Date Range** is set to "Daily" with the current date selected in **"From**".
- **Sort By** is set to "Date, Student" to sort first by Date and then by Student.

Page Functions

Field/Button	Description
Generate Report	Click to generate the Student Meals report.

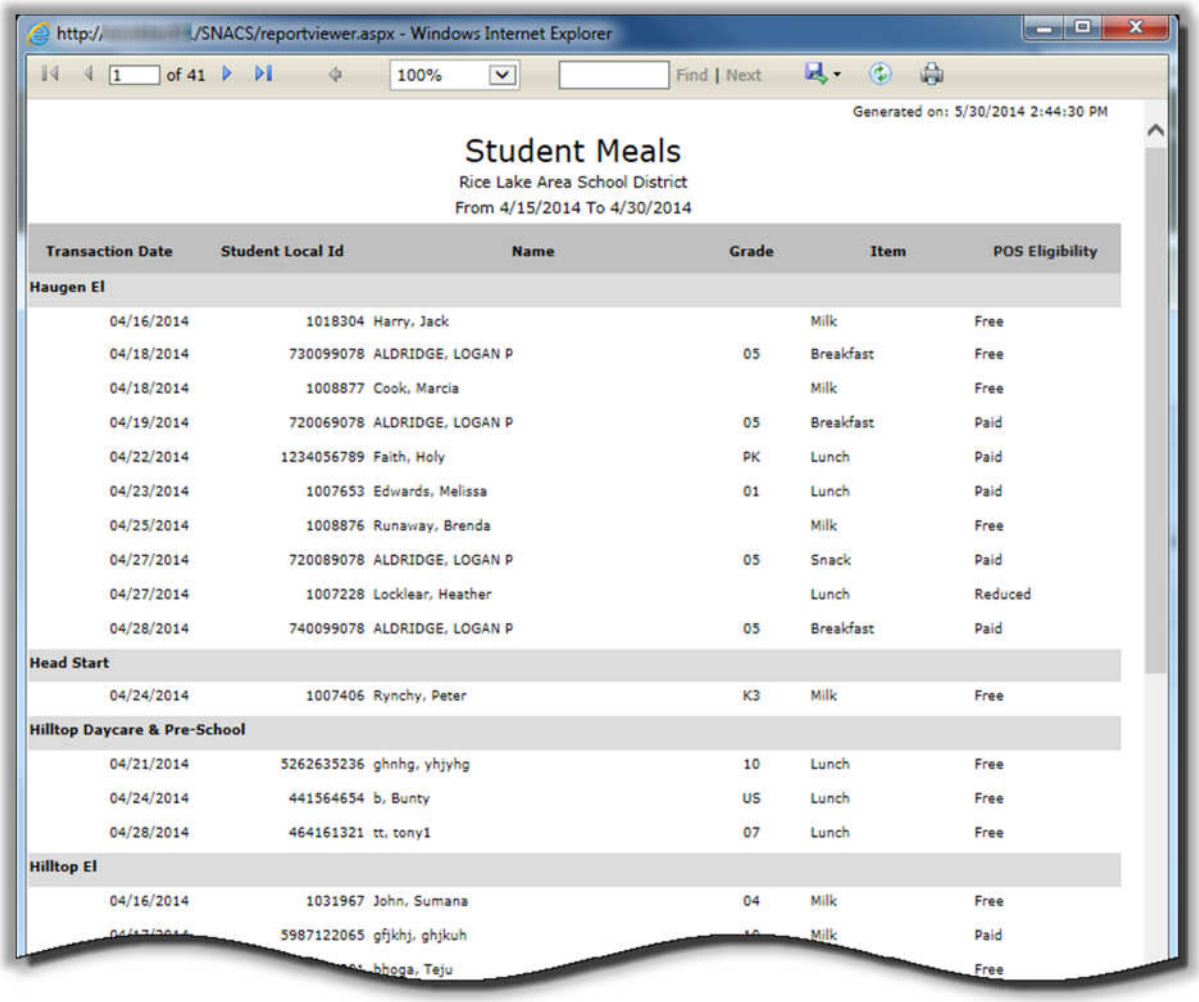
Table 4.4 Student Meals Page Functions

Generating the Student Meals Report

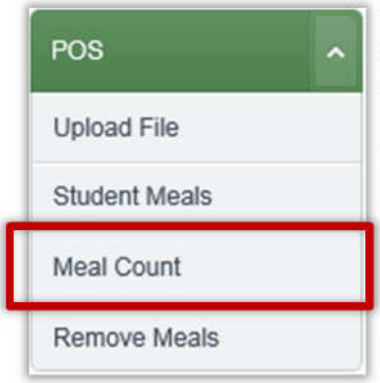


On the *Student Meals* page

- Select a **Site** or leave blank to see all sites.
- Select a date, month, or date range in the **Date Range** group.
- Select a **Sort By** option or accept the default to sort by Date and then by Student.
- Click Generate Report .



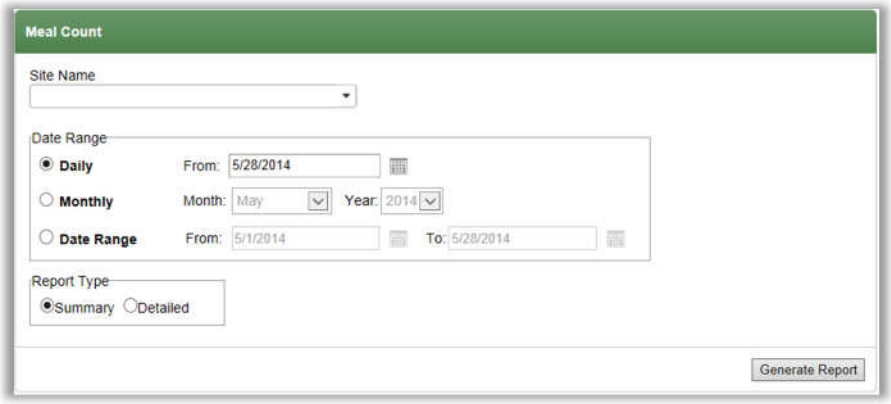
Meal Count (Report)



The **Meal Count Report** lists the number of all meals served by eligibility for a selected date or date range. All sites in the SFA are listed by default, or a specific site can be selected.

Two types of reports, Summary or Detailed, can be generated.

- Summary – lists only selected-range totals for each site
- Detailed – lists daily totals for each site



By default, on the *Student Meals* page

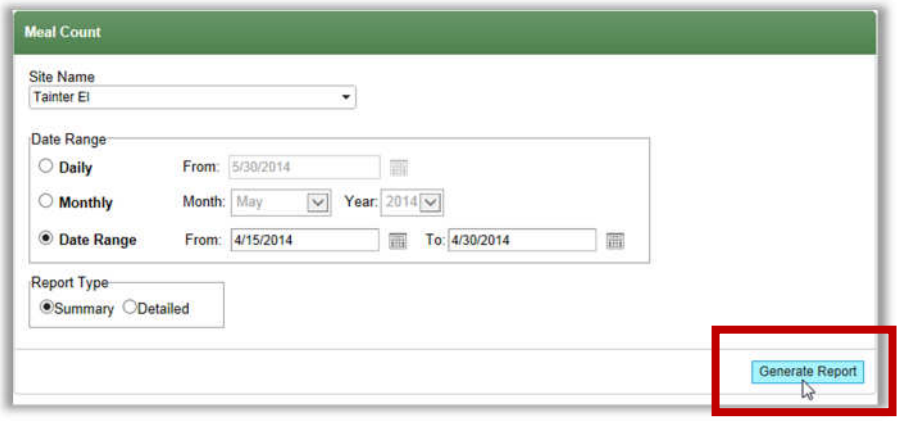
- **Site Name** is blank (which defaults to "-ALL-").
- **Date Range** is set to "Daily" with the current date selected in **"From**".
- **Report Type** is set to "Summary".

Page Functions

Field/Button	Description
Generate Report	Click to generate the Meal Count report.

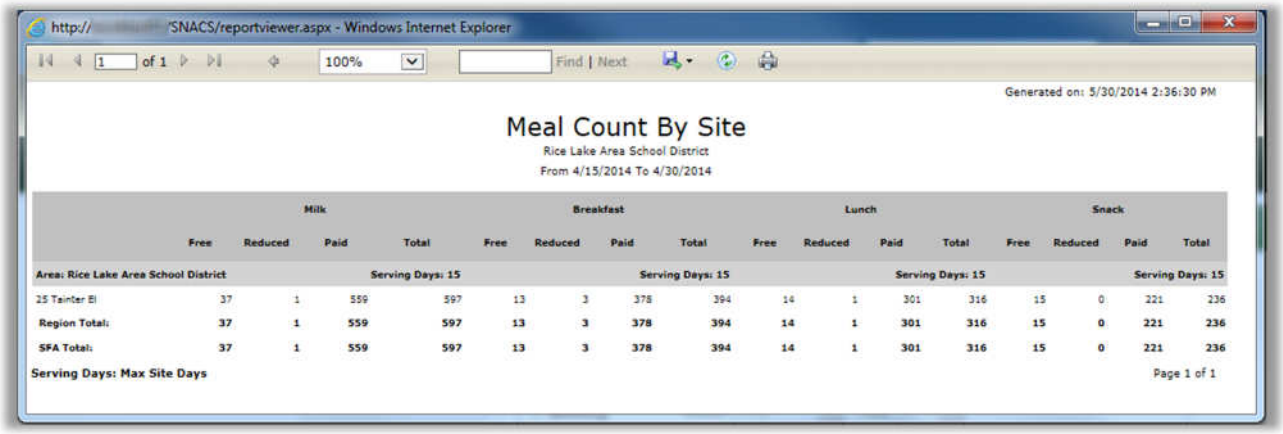
Table 4.5 Meal Count Page Functions

Generating a Summary Meal Count by Site Report

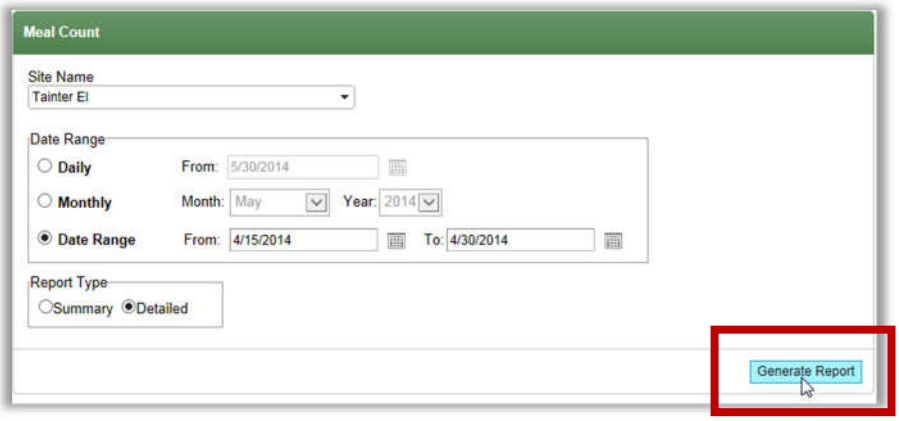


On the *Student Meals* page

- Either leave **Site Name** blank to select "All" sites or select a site.
- Select a date, month/year, or date range in the **Date Range** group.
- Select a **Report Type**.
- Click Generate Report .

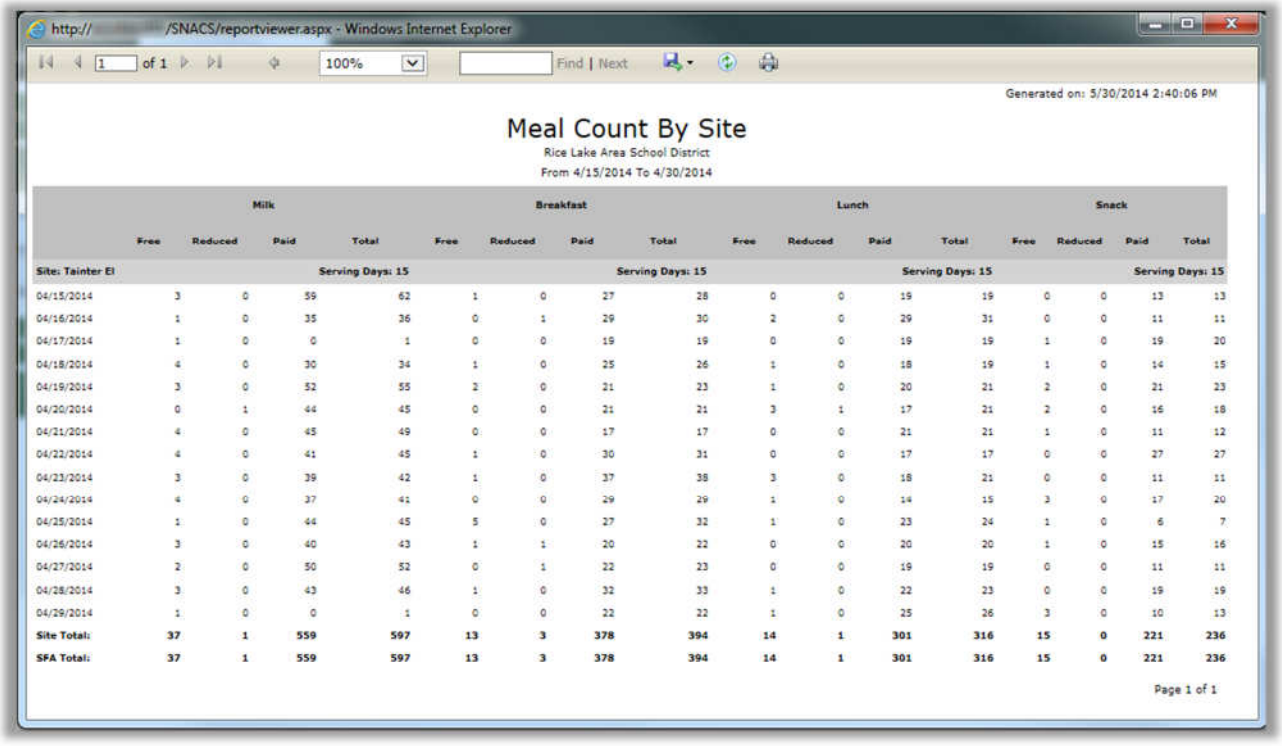


Generating a Detailed Meal Count by Site Report



On the *Student Meals* page

- Either leave **Site Name** blank to select "All" sites or select a site.
- Select a date, month/year, or date range in the **Date Range** group.
- Select a **Report Type**.
- Click Generate Report .



http:// /SNACS/reportviewer.aspx - Windows Internet Explorer

1 of 1 100% Find | Next

Generated on: 5/30/2014 2:40:06 PM

Meal Count By Site

Rice Lake Area School District

From 4/15/2014 To 4/30/2014

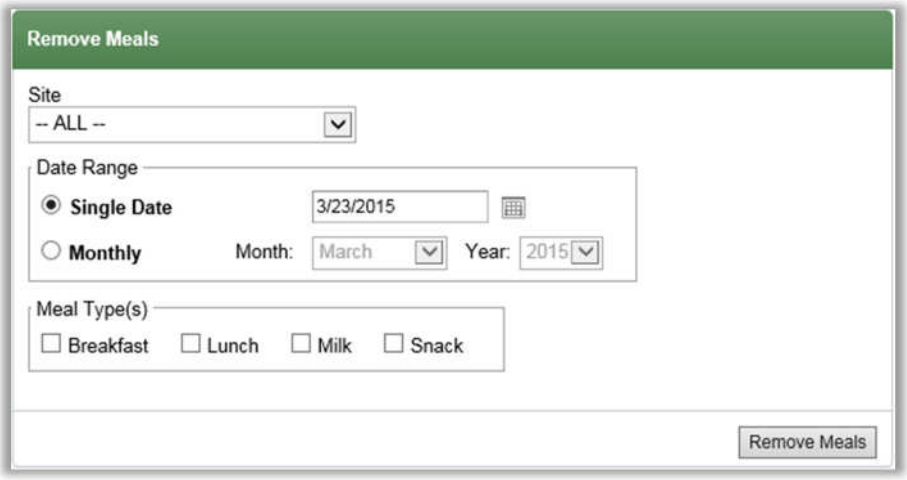
	Milk				Breakfast				Lunch				Snack			
	Free	Reduced	Paid	Total	Free	Reduced	Paid	Total	Free	Reduced	Paid	Total	Free	Reduced	Paid	Total
Site: Tainter El			Serving Days: 15				Serving Days: 15				Serving Days: 15				Serving Days: 15	
04/15/2014	3	0	59	62	1	0	27	28	0	0	19	19	0	0	13	13
04/16/2014	1	0	35	36	0	1	29	30	2	0	29	31	0	0	11	11
04/17/2014	1	0	0	1	0	0	19	19	0	0	19	19	1	0	19	20
04/18/2014	4	0	30	34	1	0	25	26	1	0	18	19	1	0	14	15
04/19/2014	3	0	52	55	2	0	21	23	1	0	20	21	2	0	21	23
04/20/2014	0	1	44	45	0	0	21	21	3	1	17	21	2	0	16	18
04/21/2014	4	0	45	49	0	0	17	17	0	0	21	21	1	0	11	12
04/22/2014	4	0	41	45	1	0	30	31	0	0	17	17	0	0	27	27
04/23/2014	3	0	39	42	1	0	37	38	3	0	18	21	0	0	11	11
04/24/2014	4	0	37	41	0	0	29	29	1	0	14	15	3	0	17	20
04/25/2014	1	0	44	45	5	0	27	32	1	0	23	24	1	0	6	7
04/26/2014	3	0	40	43	1	1	20	22	0	0	20	20	1	0	15	16
04/27/2014	2	0	50	52	0	1	22	23	0	0	19	19	0	0	11	11
04/28/2014	3	0	43	46	1	0	32	33	1	0	22	23	0	0	19	19
04/29/2014	1	0	0	1	0	0	22	22	1	0	25	26	3	0	10	13
Site Total:	**37**	**1**	**559**	**597**	**13**	**3**	**378**	**394**	**14**	**1**	**301**	**316**	**15**	**0**	**221**	**236**
SFA Total:	**37**	**1**	**559**	**597**	**13**	**3**	**378**	**394**	**14**	**1**	**301**	**316**	**15**	**0**	**221**	**236**

Page 1 of 1

Remove Meals

Remove Meals removes meals for a selected Site, Date Range, and Meal Type. This allows you to correct upload errors, such as when an upload file is applied to the wrong month.

Caution! Removals cannot be undone!



By default, on the *Remove Meals* page

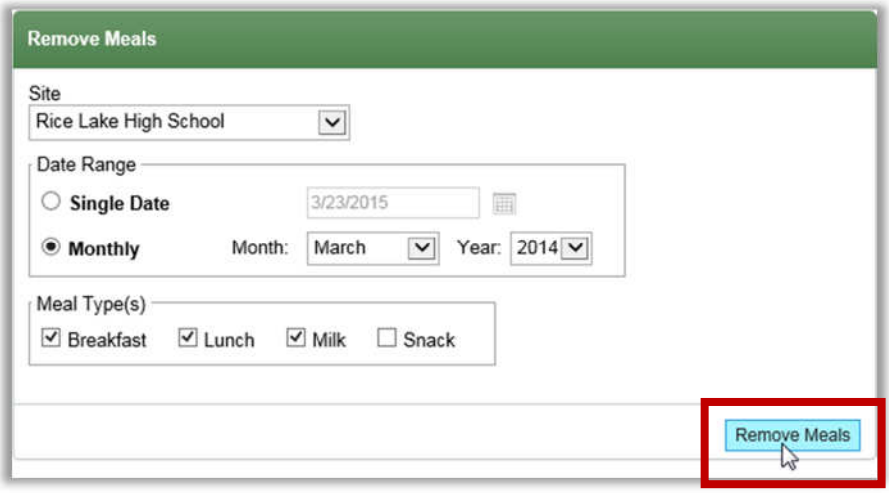
- **Site** is set to "-ALL-".
- **Date Range** is set to "Single Date" with the current date selected.
- **Meal Type(s)** is not set.

Page Functions

Field/Button	Description
Remove Meals	Click to remove selected meal types for the selected site and date range.

Table 4.6 Remove Meals Page Functions

Removing Meals

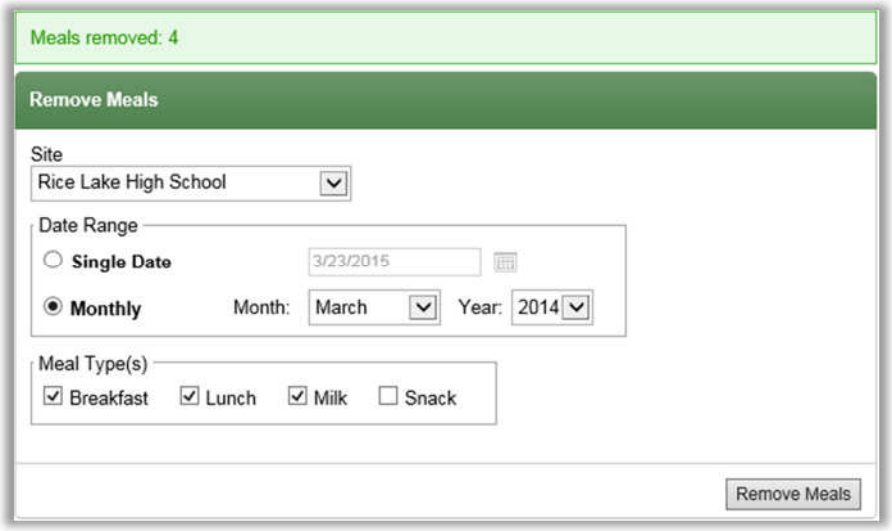


On the *Remove Meals* page

- Either leave **Site** set to "All" or select a site.
- Select an individual date, or month in the **Date Range** group.
- Select one or more **Meal Type(s)**.
- Click Remove Meals .

Note: You must choose at least one Meal Type.

A confirmation message appears with the total number of meals that meet your selected criteria.



A success message displays the number of meals removed.

End of Chapter

Chapter 5: Counting and Claiming—Edit Check

In this chapter you will learn how to

- ✓ View and enter Attendance Factors for one or more sites.
- ✓ Display a list of edit checks for a selected date or date range.
- ✓ Resolve an edit check.
- ✓ Generate an Edit Check report.

Edit Check at a Glance

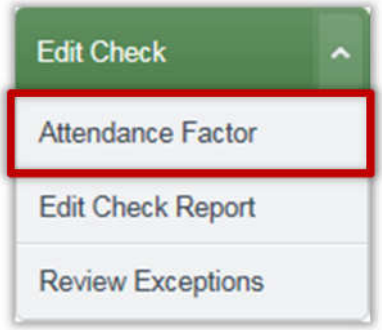
Menu Selection	Description
Attendance Factor	Allows SFA to set Attendance Factor for the SFA or an individual site.
Edit Check Report	Generate a list of meals served and allowable number of meals to serve.
Review Exceptions	Displays a list of edit checks or discrepancies between the number of meals that can be served for a Meal Type and the actual count of meals that were served

Table 5.1 Edit Check Menu Selections

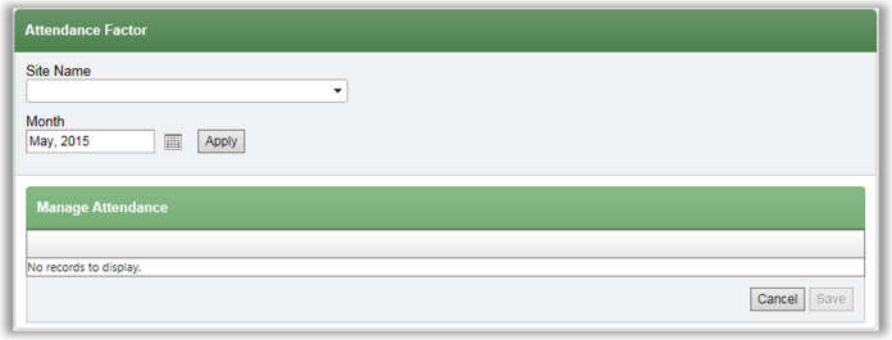
Note

Categories and menu selections to which you have access in SNACS are those appropriate for your assigned role(s). When you access the **Edit Check** menu, you may see a subset of the menu selections listed above.

Attendance Factor



Attendance Factor allows an SFA to set the Attendance Factor for the month for the SFA or an individual site (depending on the Setting Attendance Factor). The value set by the USDA may be used or a custom value may be set when manual calculations by the SFA determine that a custom Attendance Factor is appropriate.



By default, on the *Attendance Factor* page

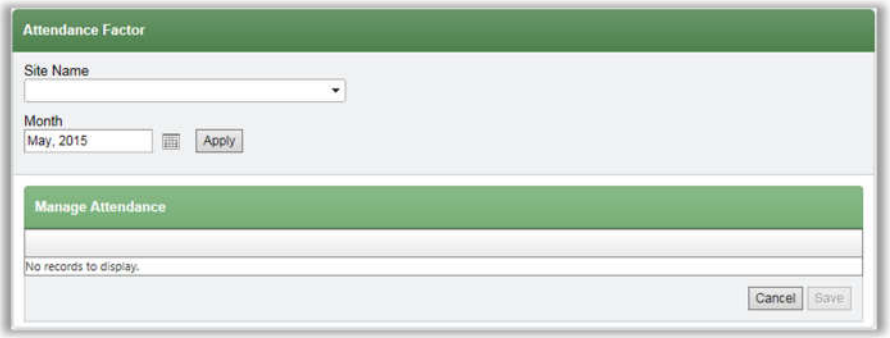
- **Site Name** is blank (which defaults to "-ALL-"). The Site Name dropdown will not be displayed if the Attendance Factor Setting is set to "*Monthly by SFA*".
- **Month** is set to the current month, year.

Page Functions

Field/Button	Description
Apply	Click to display all Attendance Factor records in the **Manage Attendance** list.
Cancel	Click to discard changes made to individual attendance factor records.
Save	Click to save changes made to individual attendance factor records.

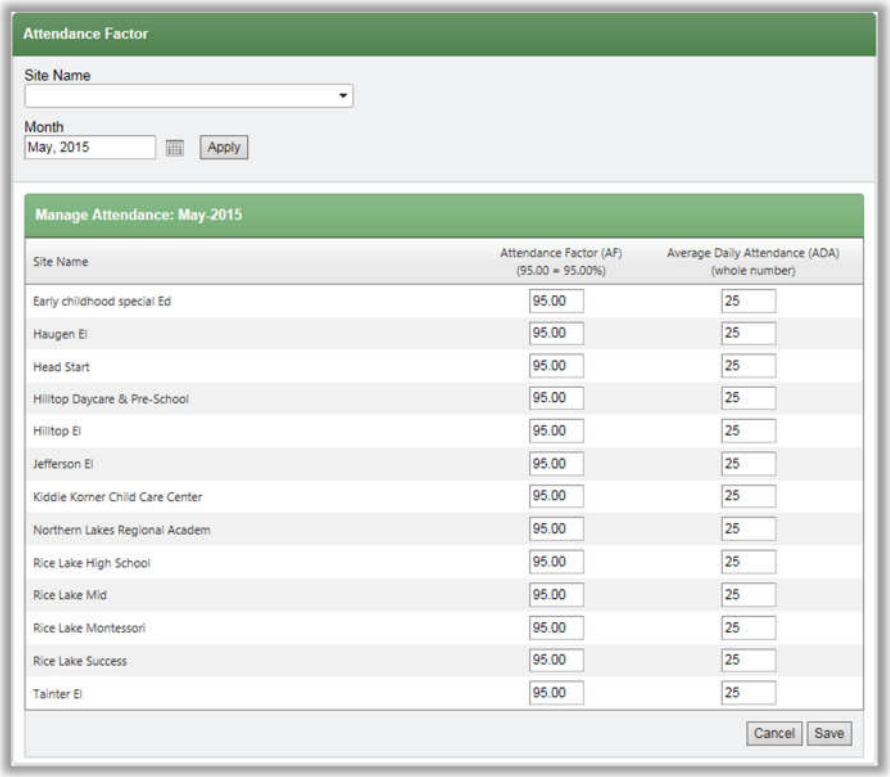
Table 5.2 Attendance Factor Page Functions

Displaying Attendance Factors



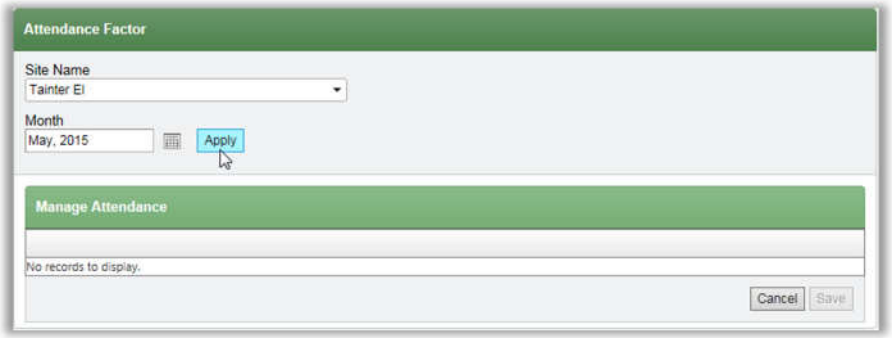
On the *Attendance Factor* page

- Accept "All" (blank) to view all sites in the SFA or select a **Site Name**. (The Site Name dropdown will not be displayed if the Attendance Factor Setting is set to "*Monthly by SFA*".
- Accept the current month or select a different **Month**.
- Click Apply .



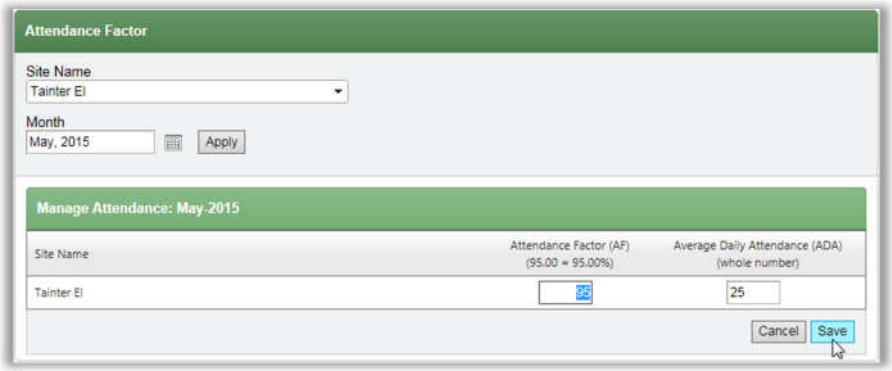
The current Attendance Factor is listed for all schools / selected school (or SFA, depending on the Setting value).

Setting an Attendance Factor



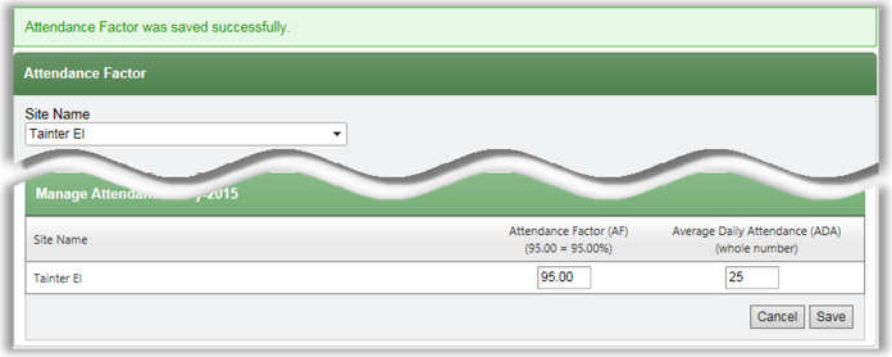
On the *Attendance Factor* page

- Accept "All" (blank) or select a **Site Name**. (The Site Name dropdown will not be displayed if the Attendance Factor Setting is set to "*Monthly by SFA*".
- Accept the current month or select a different **Month**.
- Click Apply .



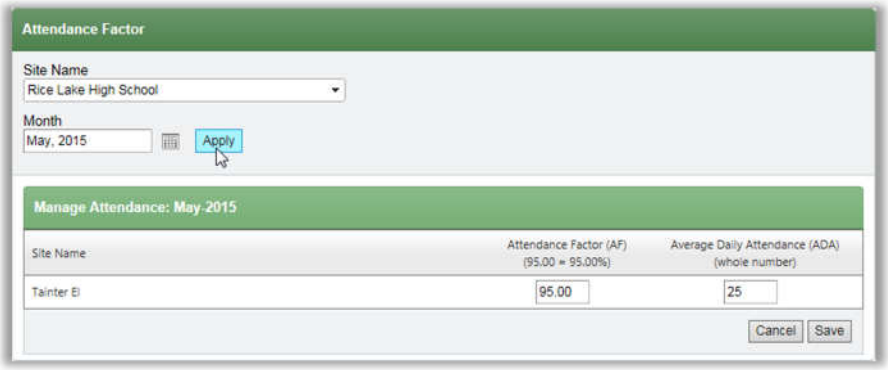
In the **Manage Attendance** group

- In **Attendance Factor** in a site listing, enter the USDA value or a custom value.
- In **Average Daily Attendance**, enter the whole number to indicate the number of students in attendance (average for this month).
- Click Save .



A save success message appears.

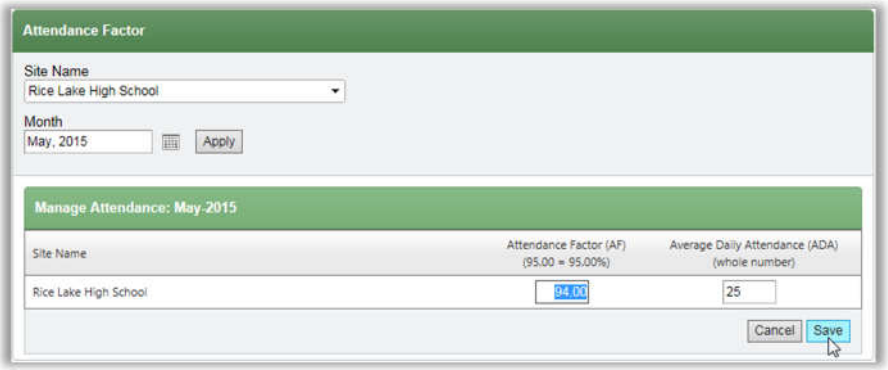
Changing an Attendance Factor



On the *Attendance Factor* page

- Accept "All" (blank) or select a **Site Name**.
- Accept the current month or select a different **Month**.
- Click Apply .

The current Attendance Factor(s) appear(s).

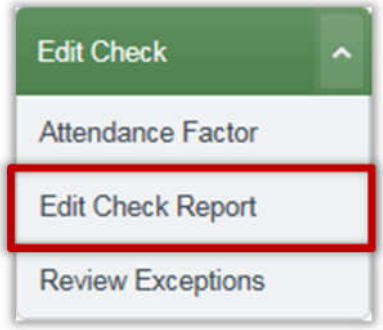


In the **Manage Attendance** group

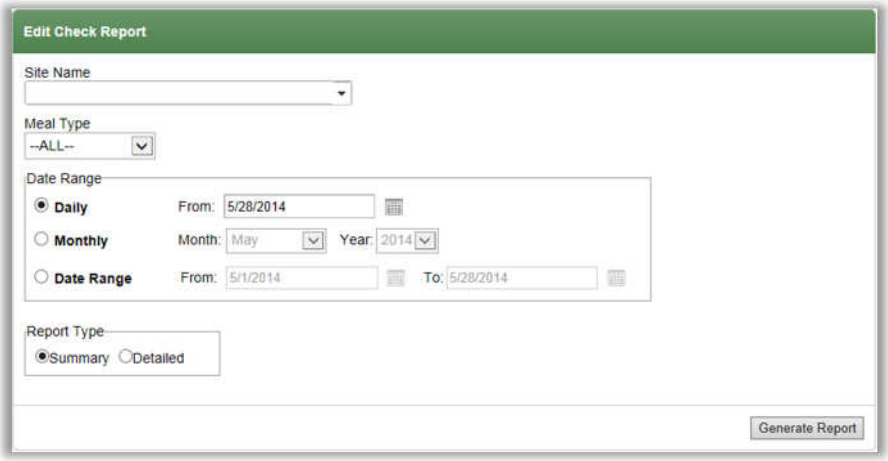
- In **Attendance Factor** in a site listing, enter a new Attendance Factor value.
- In **Average Daily Attendance**, enter the whole number to indicate the number of students in attendance (average for this month).
- Click Save .

A save success message appears.

Edit Check Report



The **Edit Check Report** lists the number of meals served and the number of allowed meal servings based on the attendance-adjusted eligible number. This report highlights areas for a closer look before reimbursement claims are submitted.



By default, on the *Edit Check Report* page

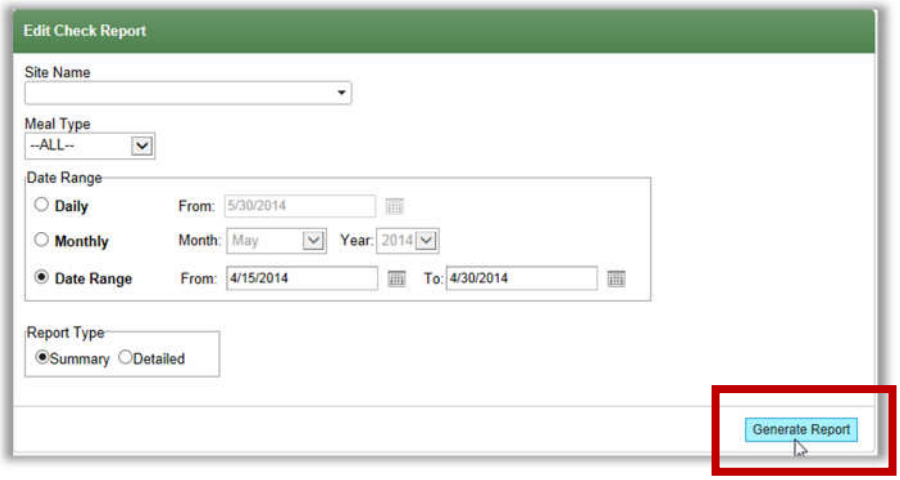
- **Site Name** is blank ("All").
- **Meal Type** is set to "—ALL—".
- **Date Range** is set to "Daily" with the current date selected in "From."
- **Report Type** is set to "Summary."

Page Functions

Field/Button	Description
Generate Report	Click to generate the Edit Check report for the selected Meal Types and Date Range.

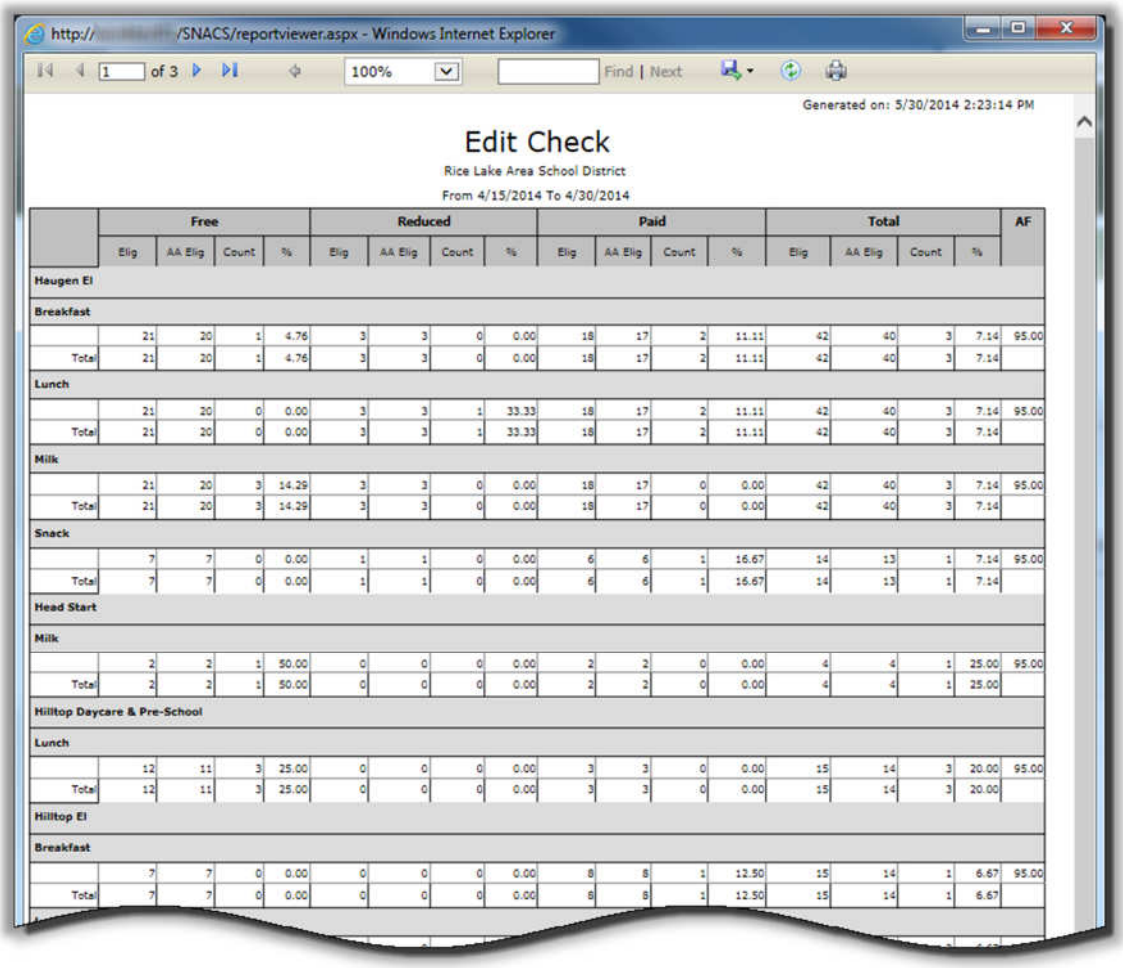
Table 5.3 Edit Check Report Page Functions

Generating a Summary Edit Check Report



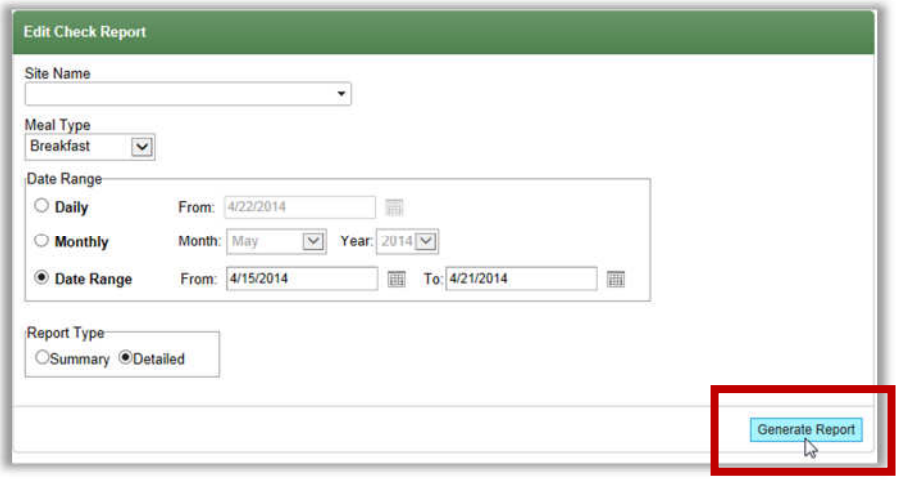
On the *Edit Check Report* page

- Either leave **Site Name** blank to select "All" sites or select a site.
- Either leave **Meal Type** set to "ALL" or select a meal type.
- Select a date, month/year, or date range in the **Date Range** group.
- Select "Summary" in **Report Type**.
- Click Generate Report .



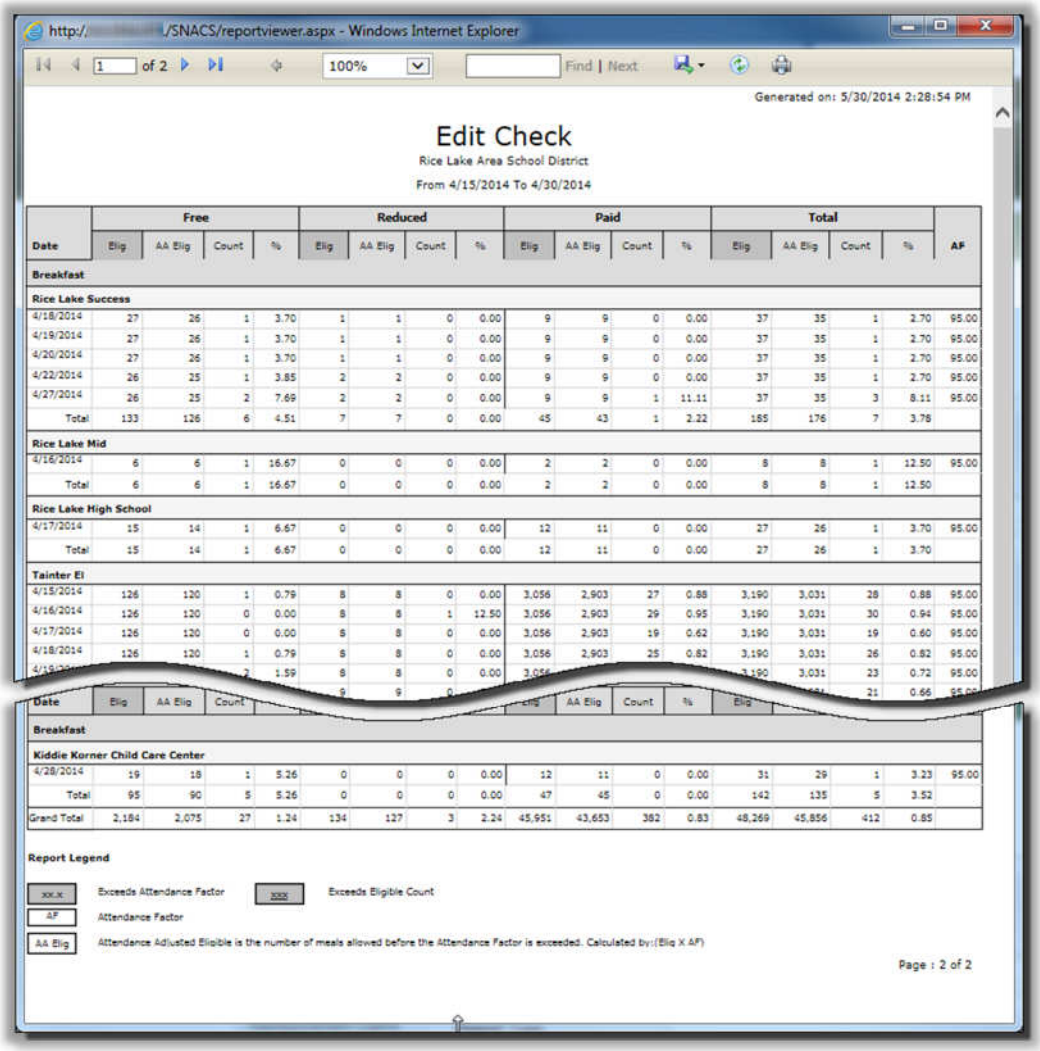
	Free				Reduced				Paid				Total				AF
	Elig	AA Elig	Count	%	Elig	AA Elig	Count	%	Elig	AA Elig	Count	%	Elig	AA Elig	Count	%	
Haugen El																	
Breakfast																	
	21	20	1	4.76	3	3	0	0.00	18	17	2	11.11	42	40	3	7.14	95.00
Total	21	20	1	4.76	3	3	0	0.00	18	17	2	11.11	42	40	3	7.14	
Lunch																	
	21	20	0	0.00	3	3	1	33.33	18	17	2	11.11	42	40	3	7.14	95.00
Total	21	20	0	0.00	3	3	1	33.33	18	17	2	11.11	42	40	3	7.14	
Milk																	
	21	20	3	14.29	3	3	0	0.00	18	17	0	0.00	42	40	3	7.14	95.00
Total	21	20	3	14.29	3	3	0	0.00	18	17	0	0.00	42	40	3	7.14	
Snack																	
	7	7	0	0.00	1	1	0	0.00	6	6	1	16.67	14	13	1	7.14	95.00
Total	7	7	0	0.00	1	1	0	0.00	6	6	1	16.67	14	13	1	7.14	
Head Start																	
Milk																	
	2	2	1	50.00	0	0	0	0.00	2	2	0	0.00	4	4	1	25.00	95.00
Total	2	2	1	50.00	0	0	0	0.00	2	2	0	0.00	4	4	1	25.00	
Hilltop Daycare & Pre-School																	
Lunch																	
	12	11	3	25.00	0	0	0	0.00	3	3	0	0.00	15	14	3	20.00	95.00
Total	12	11	3	25.00	0	0	0	0.00	3	3	0	0.00	15	14	3	20.00	
Hilltop El																	
Breakfast																	
	7	7	0	0.00	0	0	0	0.00	8	8	1	12.50	15	14	1	6.67	95.00
Total	7	7	0	0.00	0	0	0	0.00	8	8	1	12.50	15	14	1	6.67	

Generating a Detailed Edit Check Report

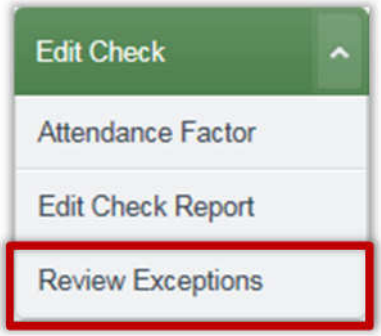


On the *Edit Check Report* page

- Either leave **Site Name** blank to select "All" sites or select a site.
- Either leave **Meal Type** set to "ALL" or select a meal type.
- Select a date, month/year, or date range in the **Date Range** group.
- Select "Detailed" in **Report Type**.
- Click Generate Report .

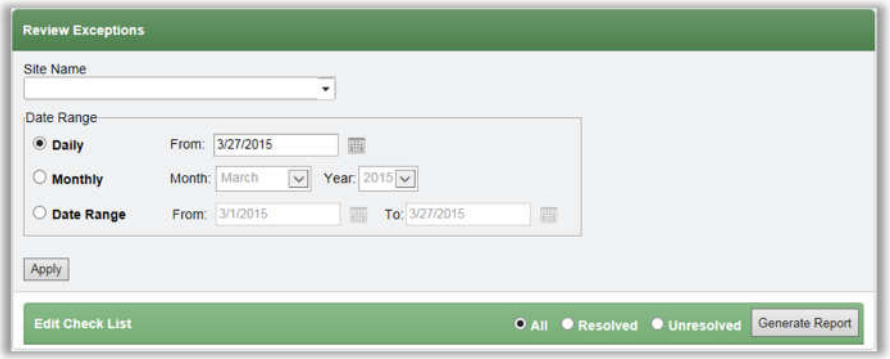


Review Exceptions



Review Exceptions displays a list of edit checks or discrepancies between the number of meals that can be served for a Meal Type and the actual count of meals that were served. Each edit check offers a reason for flagging the Meal Type count.

Comments should be added to individual edit checks to explain the discrepancy.



By default, on the *Review Exceptions* page

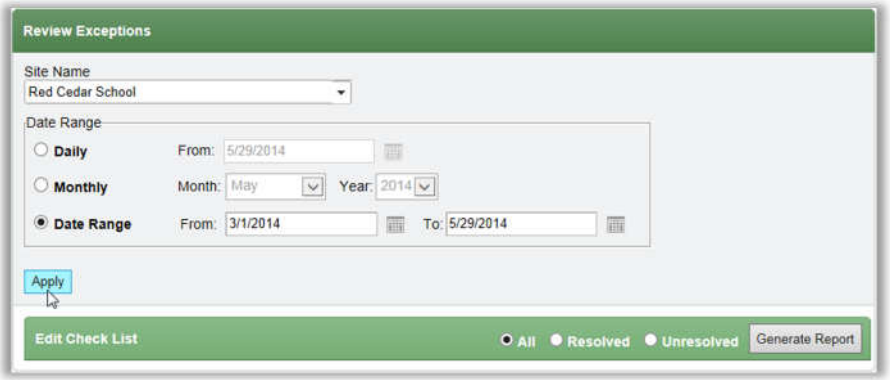
- **Site Name** is blank (which defaults to "-ALL-").
- **Date Range** group is set to "Daily" with the current date selected in "From".

Page Functions

Field/Button	Description
Apply	Click to display all edit check exceptions in the **Edit Check** list.
Generate Report	Click to create the Review Exceptions report listing exceptions for the selected date range.

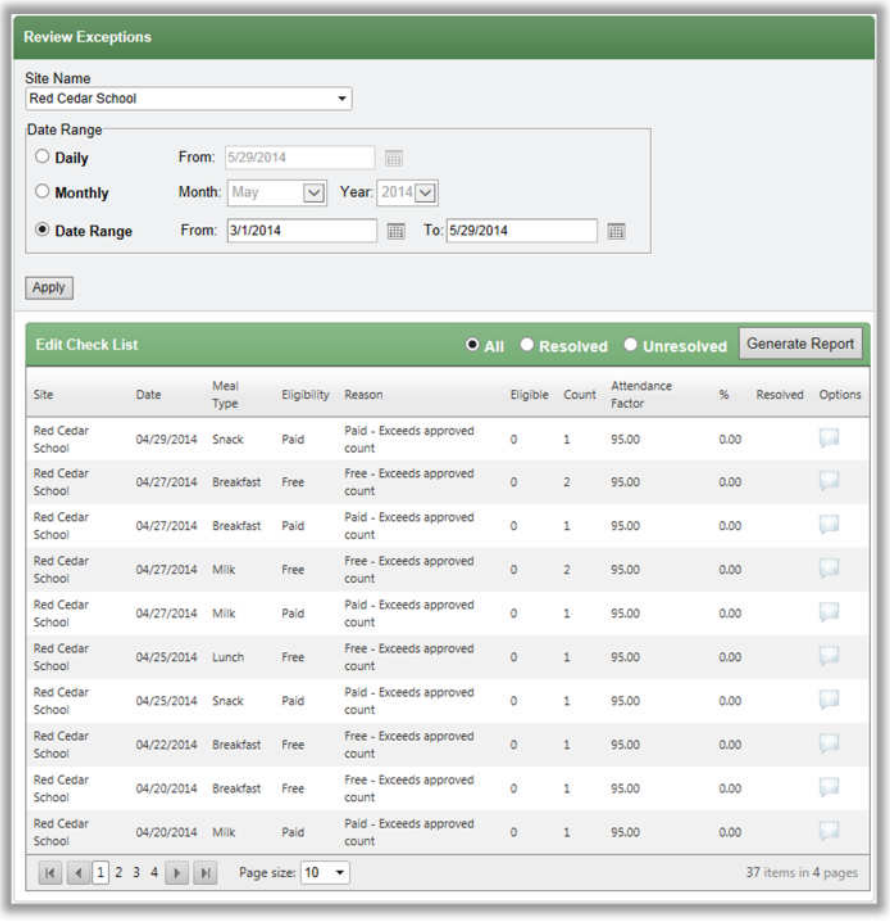
Table 5.4 Review Exceptions Page Functions

Displaying a List of Exceptions



On the *Review Exceptions* page

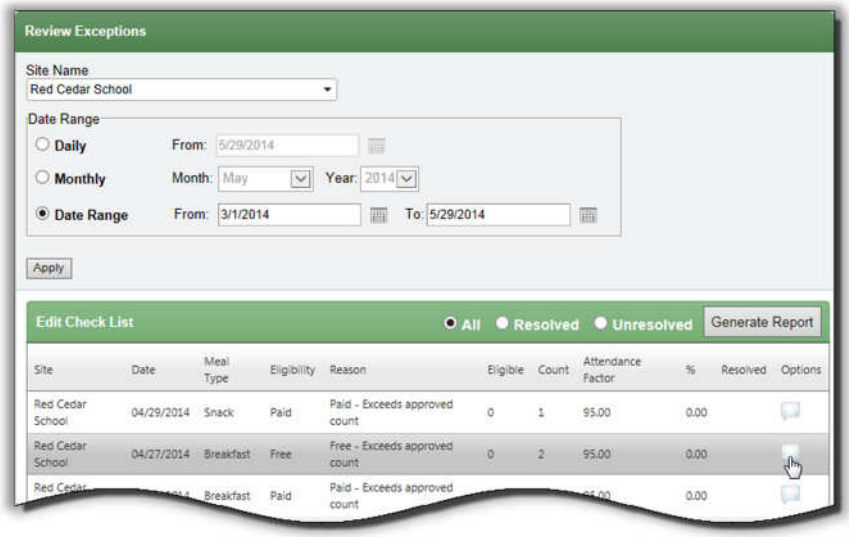
- Accept "All" (blank) in **Site Name** or select a site.
- Select a date, month or date range in the **Date Range** group.
- Click Apply .



All edit check records that meet the search conditions are displayed in **Edit Check List**.

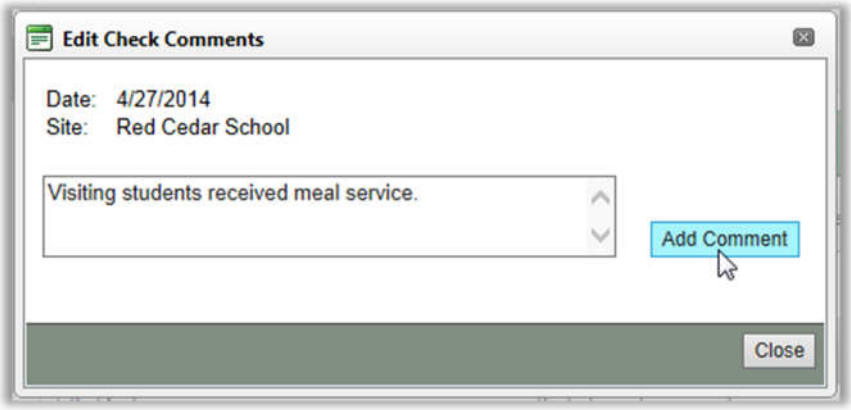
Note: Refer to page 19 for a list of techniques to scroll among pages in the **Edit Check List**.

Resolving an Edit Check



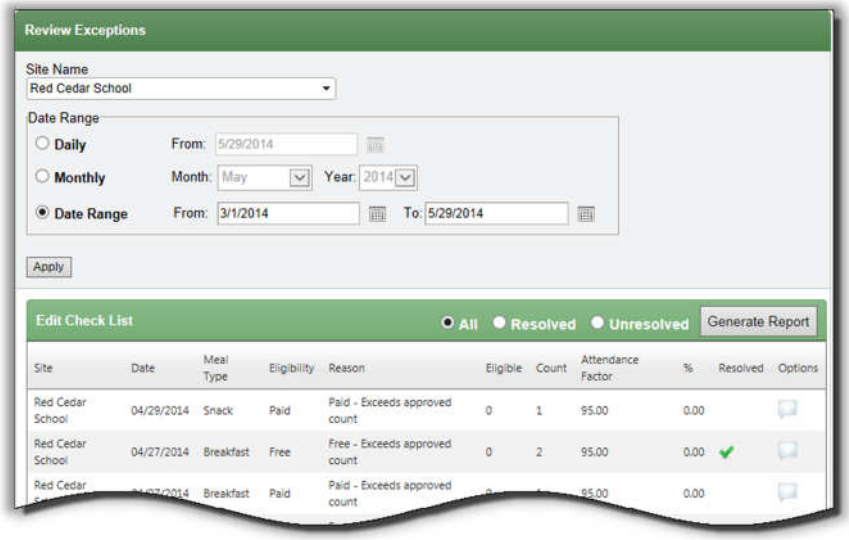
On the *Review Exceptions* page

- Use search criteria to display a list of edit checks.
- Click **View Comments** ( ) in an edit check listing.



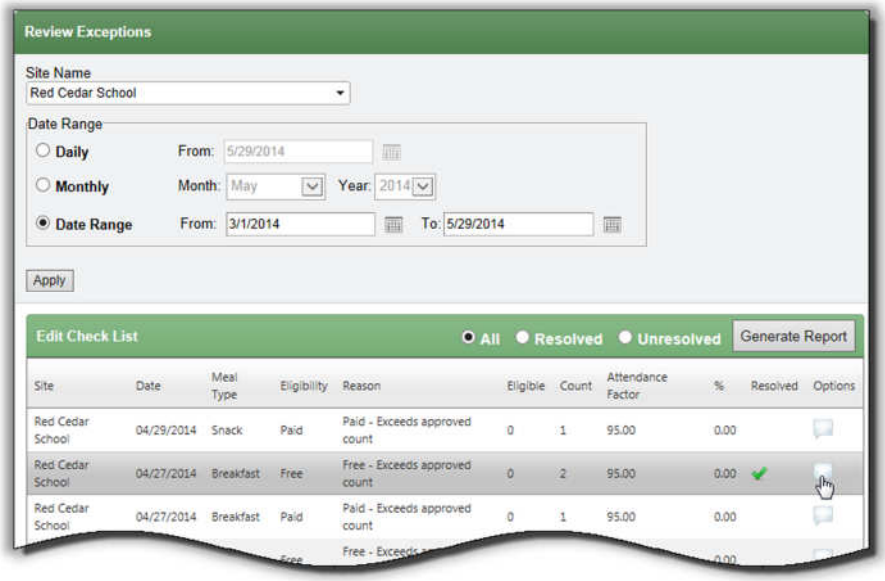
In the *Edit Check Comments* popup

- Enter comments to explain the discrepancy between the Eligiblity and Count values for the Meal Type.
- Click Add Comment .



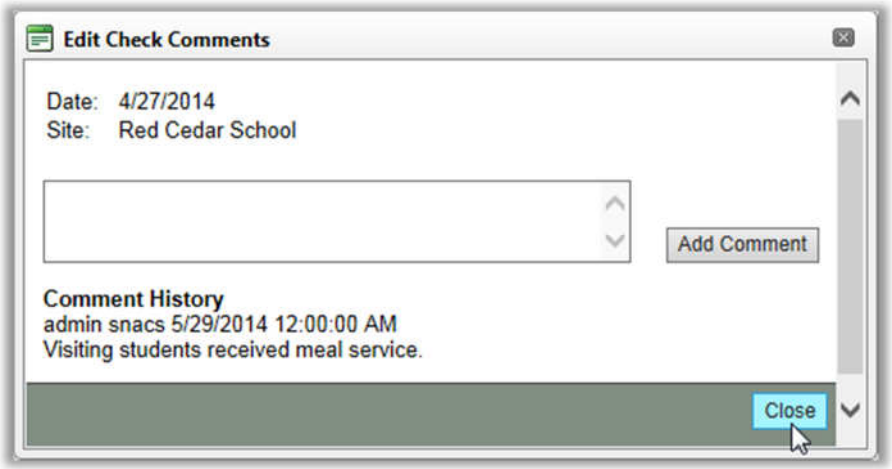
The resolved edit check displays a " ✔ " (green check mark) in the **Resolved** column.

Viewing Edit Check Resolution Comments



On the *Review Exceptions* page

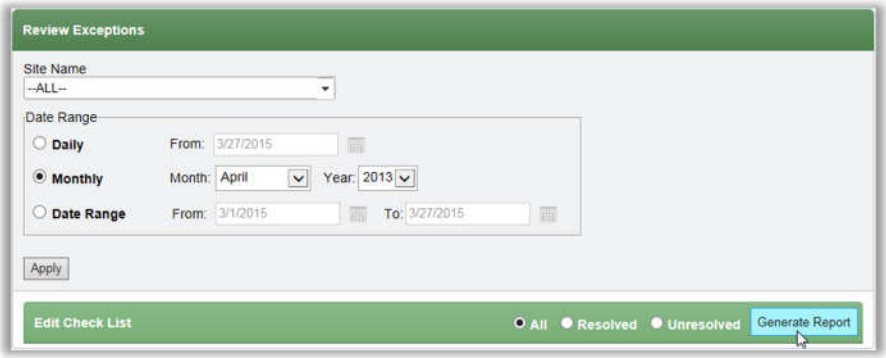
- Use search criteria to display a list of edit checks.
- Click **View Comments** ( ) in an edit check listing which has a ✔ in the **Resolved** column.



In the *Edit Check Comments* popup

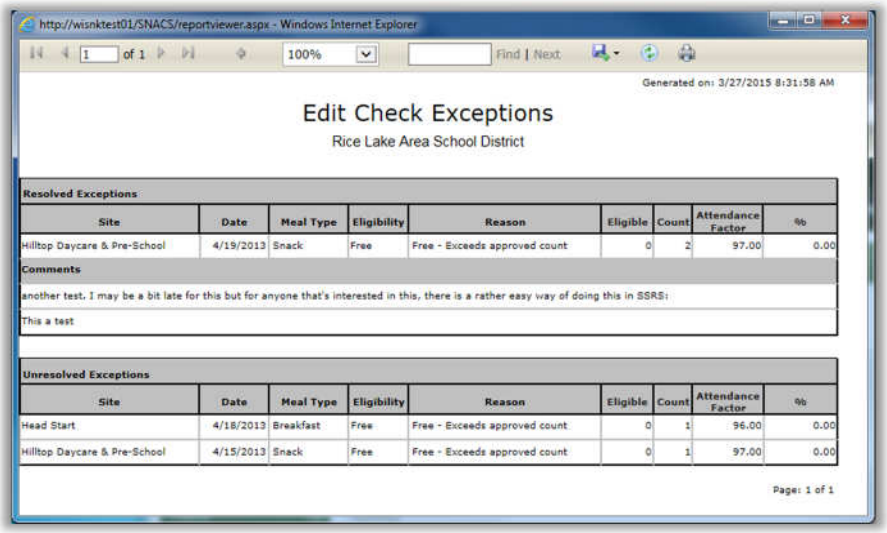
- Review the comments listed in **Comment History**.
- Click Close .

Generating the Edit Check Exceptions Report



On the *Review Exceptions* page

- Select a **Site Name** or accept "—ALL—".
- Select a **Date Range** option and enter/select a date.
- Select the exception type option (All, Resolved, Unresolved).
- Click Generate Report .



The *Edit Check Exceptions* report appears in the report viewer.

- Click to print the report, or
- Click to save the report to a file.

➢ *End of Chapter* ➢

Chapter 6: Counting and Claiming—Claims

In this chapter you will learn how to

- ✓ Generate a Reimbursement Claim.

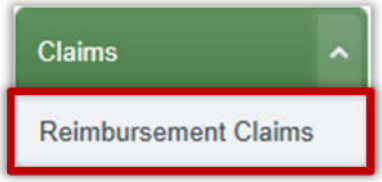
Claims at a Glance

Menu Selection	Description
Reimbursement Claims	Generate a Reimbursement Claim for a selected year and period.

Table 6.1 Claims Menu Selections

Note
Categories and menu selections to which you have access in SNACS are those appropriate for your assigned role(s). When you access the **Claims** menu, you may see a subset of the menu selections listed above.

Reimbursement Claims



Reimbursement Claims generates a claim for reimbursement for meals served to eligible patrons for a selected year and period (based on POS file uploads). After the claim is created, it is then submitted (for review only, not payment). The data can also be used to enter the claim in FNS.

If data is updated for a generated claim period, the claim can be re-created. Two reports detail claim data

- Summary Report – provides general information for each program (number of schools, days in operation, and average daily attendance (ADA) and meal counts).
- Detailed Report – provides counts and reimbursement amounts by eligibility for each site.

Note: The Submit button is unavailable until all Edit Check Exceptions have been Resolved.

By default, on the *Reimbursement Claims* page

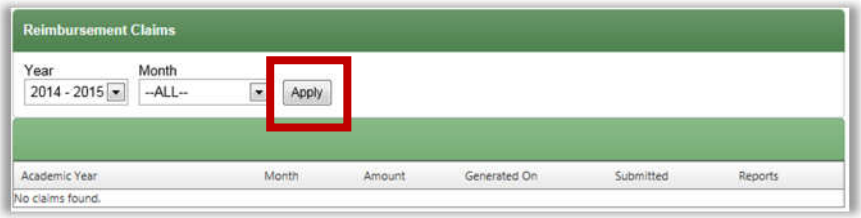
- **Year** is set to the current school year.
- **Month** is set to "—ALL—".

Page Functions

Field/Button	Description
Create Claim	Click to generate a reimbursement claim.
Apply	Click to set the selected Year and Period.

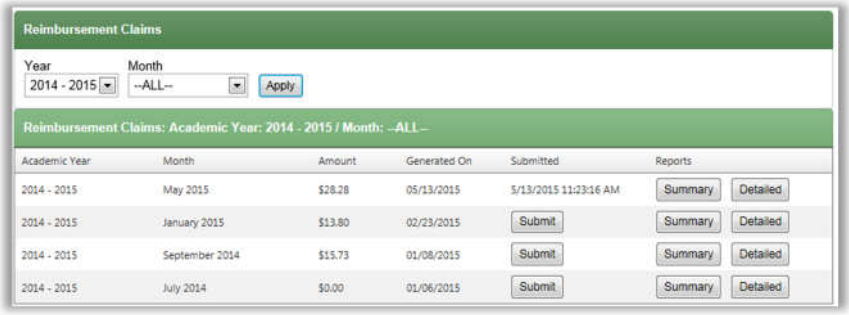
Table 6.2 Reimbursement Claims Page Functions

Listing Generated Reimbursement Claims



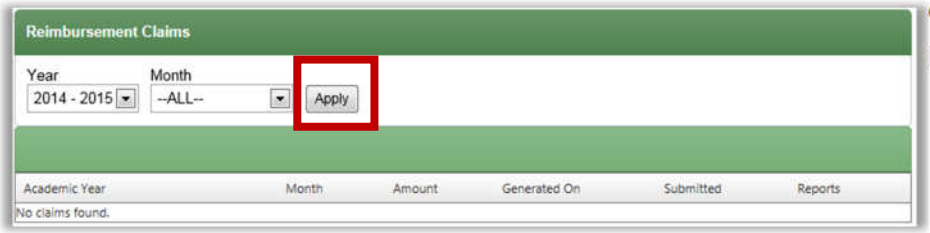
On the *Reimbursement Claims* page

- Select a **Year**.
- Accept "—ALL—" or select a **Month**.
- Click Apply .



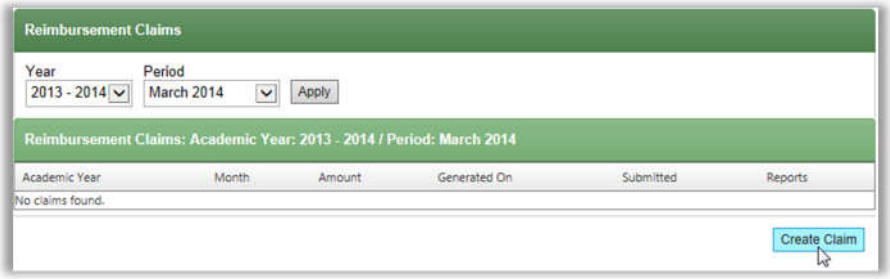
All generated claims for the selected **Year** and **Month** are shown in the **Reimbursement Claims** list.

Creating a Reimbursement Claim



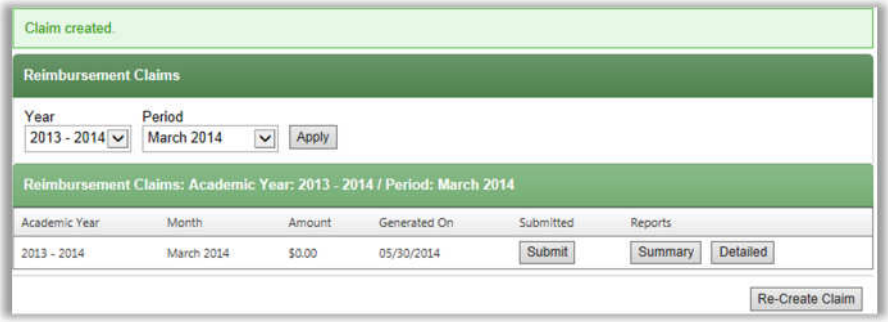
On the *Reimbursement Claims* page

- Select a **Year**.
- Select a **Period**.
- Click Apply .



On the *Reimbursement Claims* page

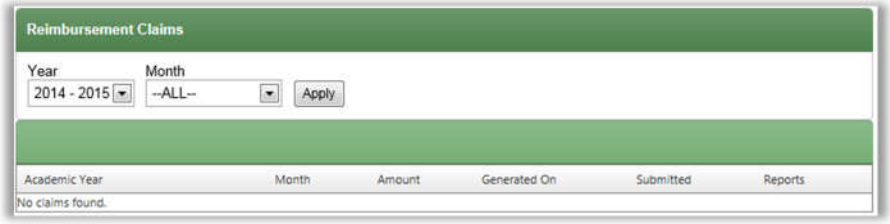
- Click Create Claim



A creation message appears.

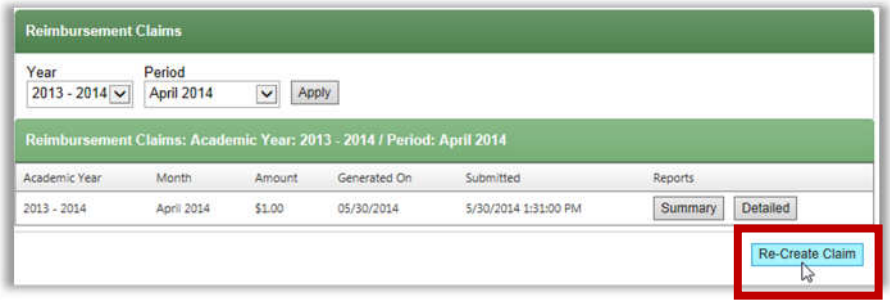
Four new buttons appear.

Re-creating a Reimbursement Claim



On the *Reimbursement Claims* page

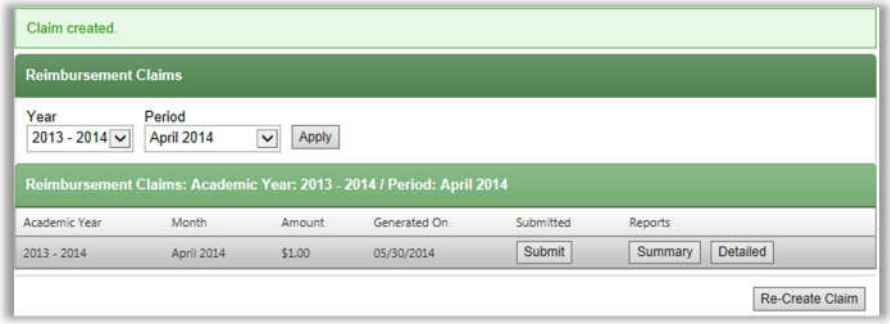
- Select a **Year**.
- Select a **Month**.
- Click



On the *Reimbursement Claims* page in a claim listing

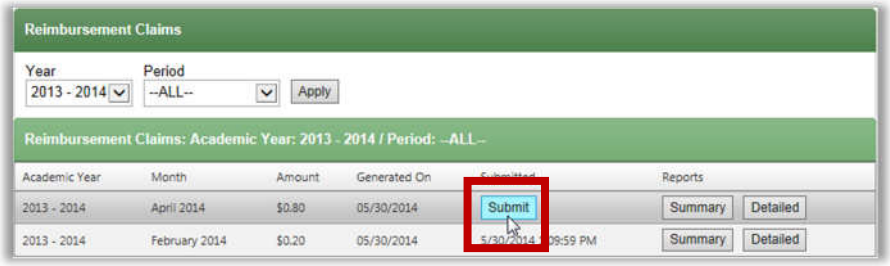
- Click

.



A creation message appears. The date and time of the "re-creation" appears in **Generated On**

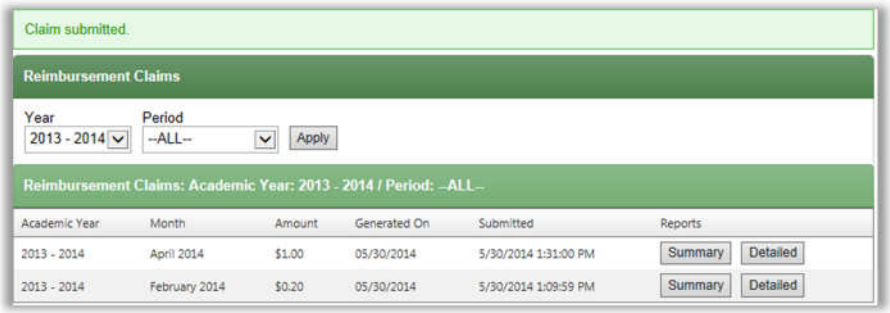
Submitting a Reimbursement Claim



On the *Reimbursement Claims* page

- Display a selected claim or a list of claims.
- Click Submit .

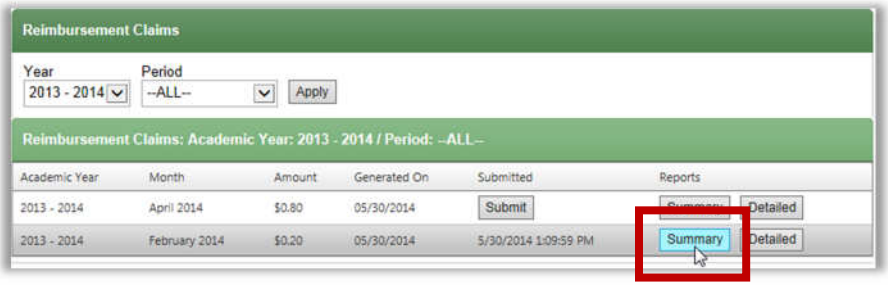
Note: The Submit button is unavailable until all Edit Check Exceptions have been reviewed.



A submitted message appears.

The Submit button is replaced with the date and time of claim submission.

Generating a Summary Claim Report

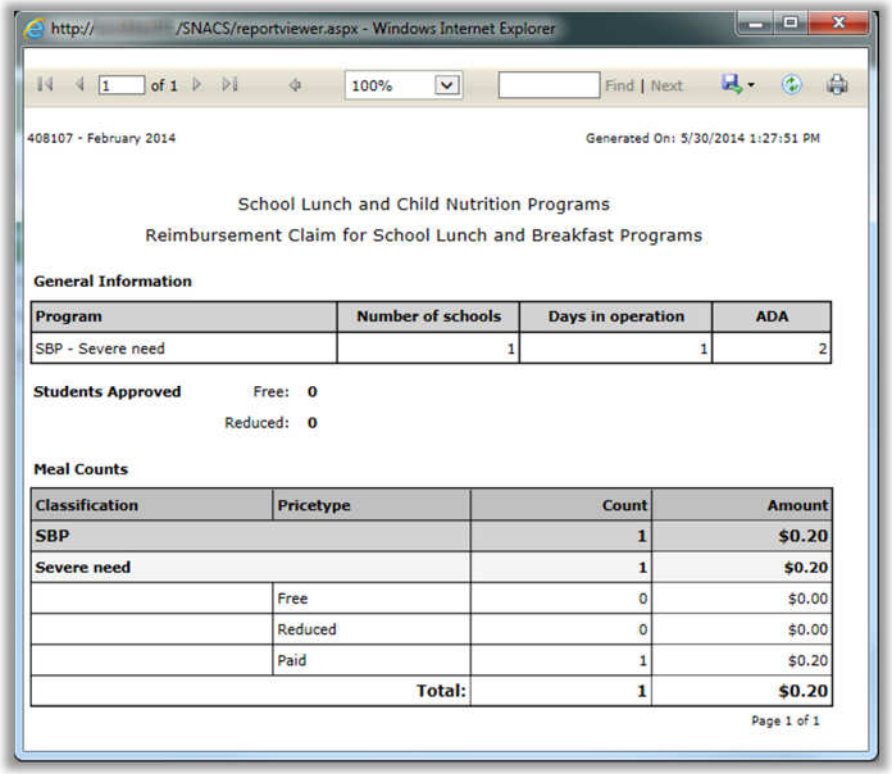


On the *Reimbursement Claims* page in a claim listing

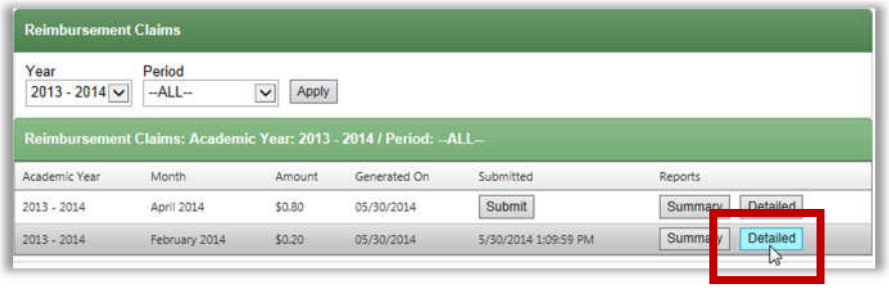
- Click Summary .

The Claim Summary report appears and provides general program information and meal counts by eligibility for each program.

Note: A warning message appears on the report when meals are uploaded for a Program in which the SFA does not participate



Generating a Detailed Claim Report

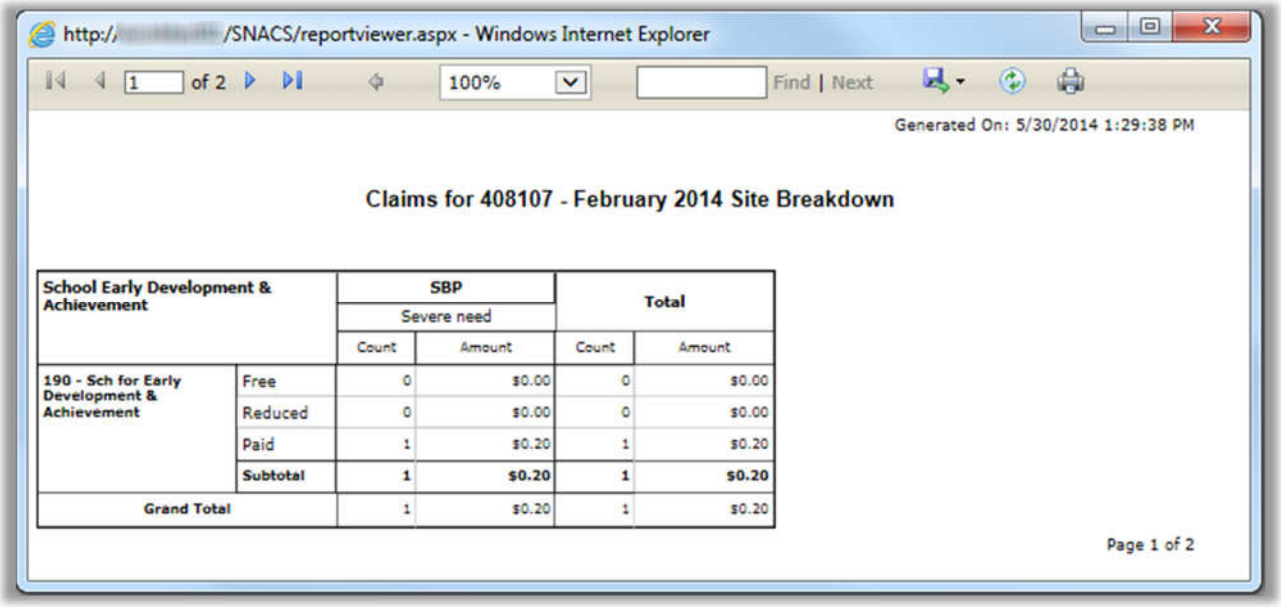


On the *Reimbursement Claims* page in a claim listing

- Click Detailed .

The Detailed Claim report appears. One page is generated for each site in the Claim and provides counts and dollar reimbursement amounts for each eligibility for each program. Totals of each eligibility are listed for each classification.

Note: A warning message appears on the report when meals are uploaded for a Program in which the SFA does not participate.



➢ *End of Chapter* ➢

Chapter 7:
Admin—Sites and Users

In this chapter you will learn how to

- ✓ Describe SNACS organizational levels.
- ✓ Display sites and site details for a School Food Authority (SFA).
- ✓ Set the school year Start Date and Carryover End Date for all sites in an SFA or for individual sites.
- ✓ Display all users assigned to an SFA.
- ✓ Add a new user to an SFA and manage user details.
- ✓ Deactivate a user.
- ✓ Display user login history.

Sites and Users at a Glance

Menu Selection	Description
SFAs	Display all sites and site details for a School Food Authority; set up school year start and Carryover End Dates.
Sites	Display sites by SFA name, site type or site name; display site details.
Users	Create and manage Users access to SNACS.
Login Details	Display log in and log out dates and times for a selected user.

Table 7.1 Sites and Users Menu Selections

Note
Categories and menu selections to which you have access in SNACS are those appropriate for your assigned role(s). When you access the **Sites and Users** menu, you may see a subset of the menu selections listed above.

About Organizational Levels and User Roles

Two organizational levels are used in **SNACS**:

- School Food Authorities (SFAs) which administer a school feeding program, and
- Department of Public Instruction (DPI) which monitors compliance of the administration of the school feeding programs by SFAs.

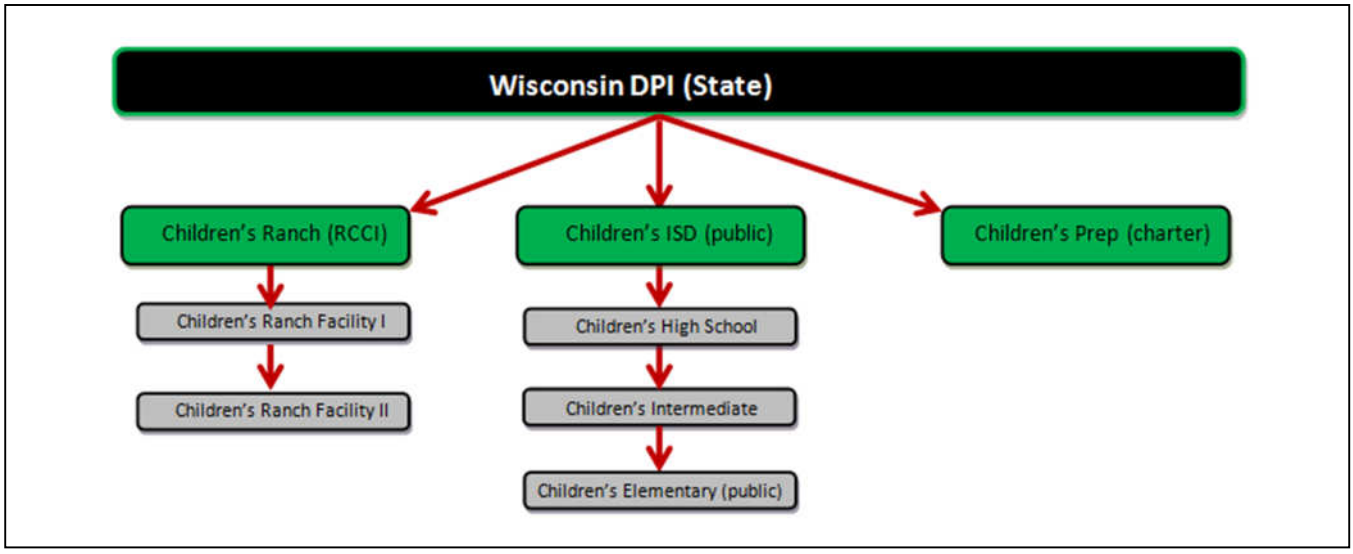


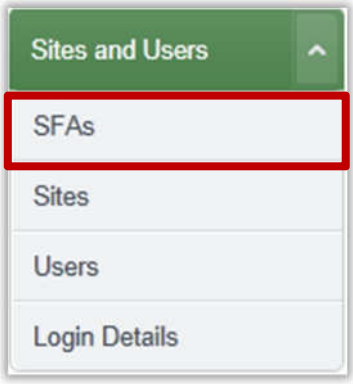
Figure 7.1 Wisconsin Department of Instruction and School Food Authorities Structure

SNACS users at the **SFA** organization level include individuals who are responsible for school feeding program administration for an individual School Food Authority, such as school district Food Service Directors.

SNACS users at the **DPI** organization level include individuals who are responsible for monitoring the administration of the school feeding program(s) at one or more School Food Authorities (SFAs).

Each SNACS user is assigned a "role" or roles. A role specifies access to menu selections which support the user's work duties in SNACS. Roles assigned to SFA-level users include menu selections to manage program administration at the SFA. Roles assigned to DPI-level users include menu selections to manage compliance of program administration at one or more SFAs.

SFAs

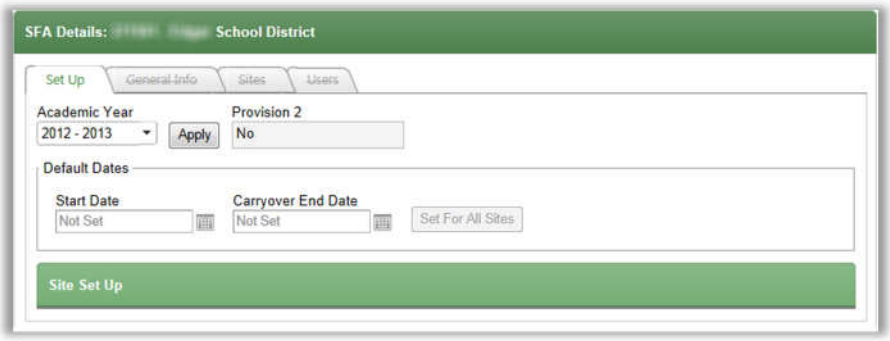


SFAs displays details for your SFA site.

Academic Year Start Date and Carryover End Date are set for an SFA on the **Set Up** tab of the *SFA Details* page. The same dates can be set for all schools in the SFA, or individual dates can be set by school, as needed. Setting these dates is part of the "year begin" process. The Academic Year set up should be done prior to 7/31.

Each SFA has a designated Authorized Representative who is the point of contact for the SFA.

Note: The date set for **Start Date** is the first date that online applications are accepted through the Free and Reduced Price School Meal Application website.



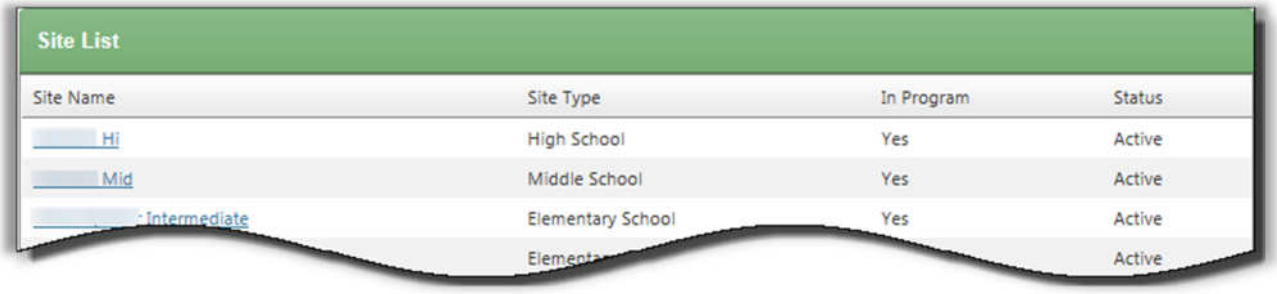
By default on the *SFAs Details* page

- Four tabs are shown.
- The **Set Up** tab is displayed.

Note

When the SFA Details page is first accessed, the only available tab is **Set Up**. The remaining tabs become available after Start Date and Carryover End Date dates are entered and saved for the selected Academic Year.

Listings: Site List

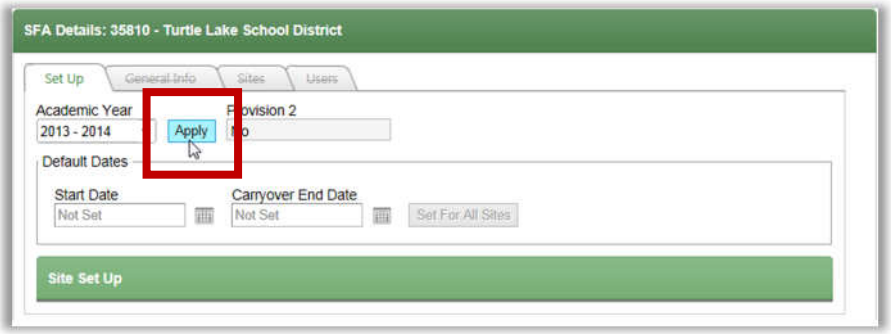


Each listing in **Site List** includes:

Header Name	Data Type	Description
Site Name	*Clickable link*	*Sortable;* Complete name of the site which serves meals/snacks/milk through administration of an SNA program.
Site Type	*View only*	*Sortable;* Grade level served at the site; examples of site types include but are not limited to: Elementary School — Middle School High School — Elem/Sec Combined RCCI — Junior H.S.
In Program	*View only*	*Sortable*; Indicates if site is participating in the school feeding program. ▪ "**Yes**" – School does participate ▪ "**No**" – School does not participate
Status	*View only*	*Sortable*; Indicates that the site is actively participating in administration of one or more SNA programs.

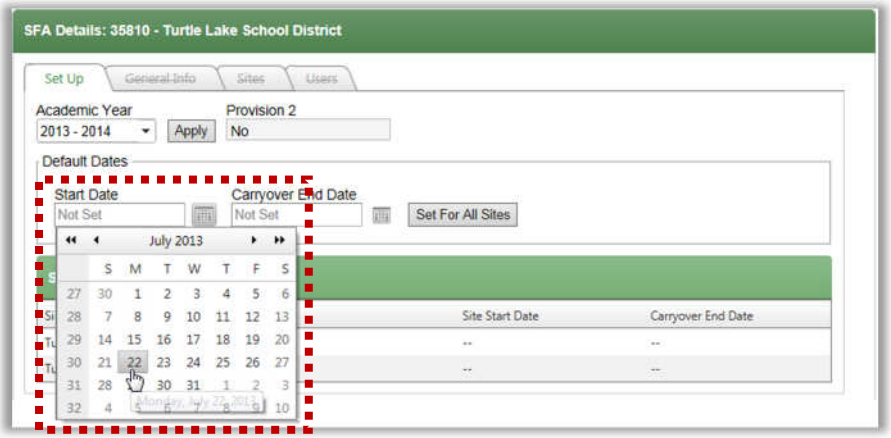
Table 7.2 Site List Listings

Setting the Same School Year Start Date and Carryover End Date for All Sites



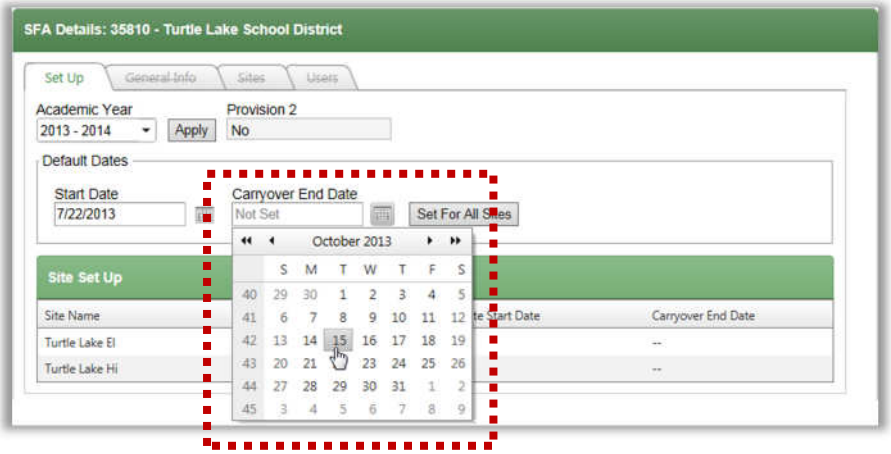
On the **Set Up** tab

- In **Academic Year**, select a year, if needed.
- Click Apply.
- All sites in the SFA are listed in the **Site Set Up** group.



In the **Default Dates** group

- Click Calendar ( ) in **Start Date**.
- Select a date on the displayed calendar.

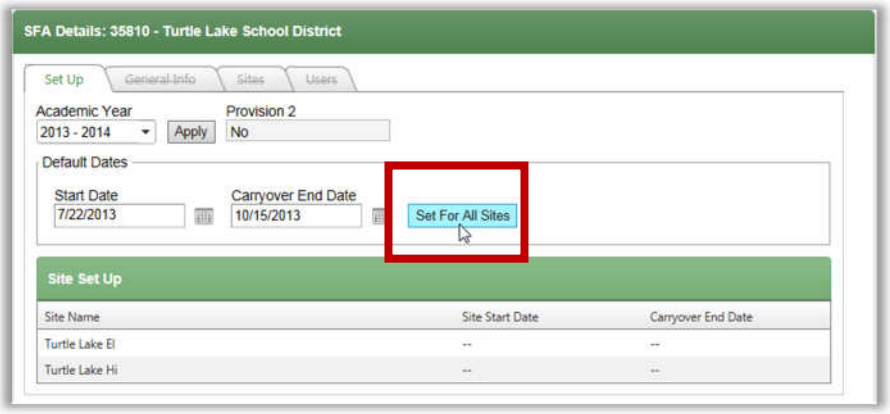


In the **Carryover End Date** group

- Click Calendar ( ) in **Carryover End Date**.
- Select a date on the displayed calendar.

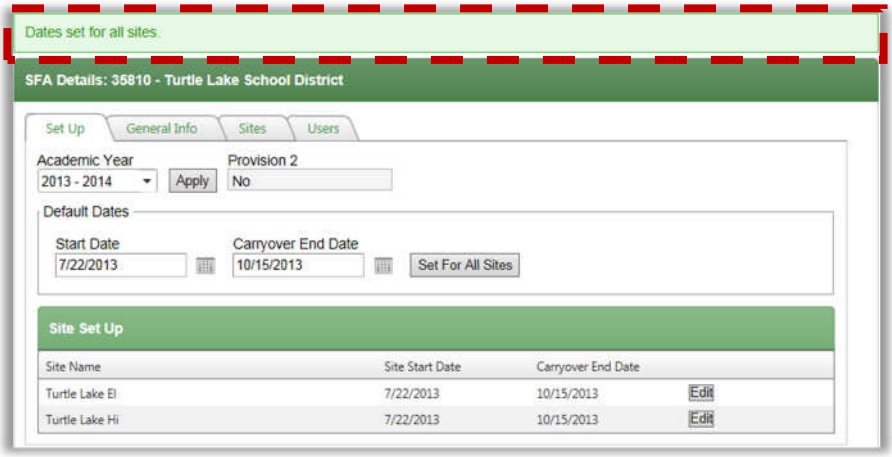
Note

Remember, the **Carryover End Date** must not be more than 30 operating days after the **Start Date**.



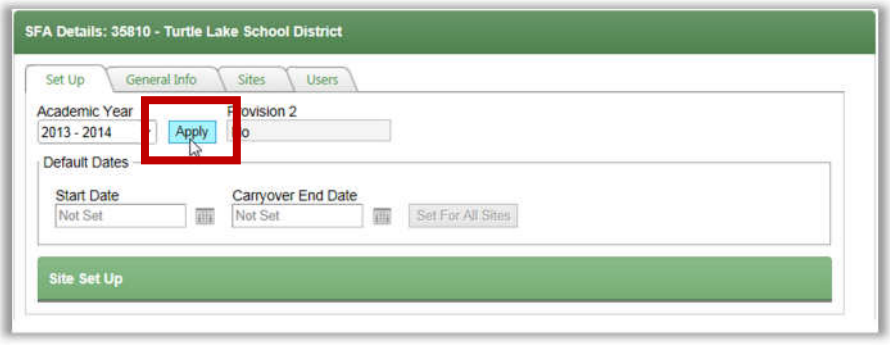
In the **Default Dates** group

- Click Set For All Sites .



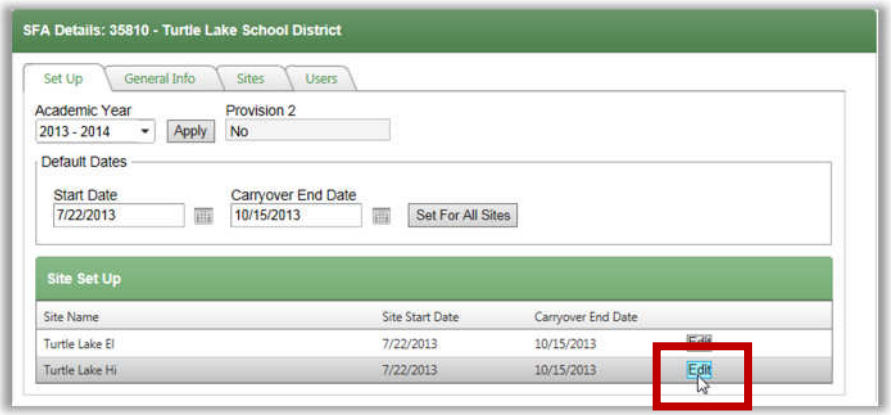
A date set message appears.

Setting a School Year Start Date for an Individual Site



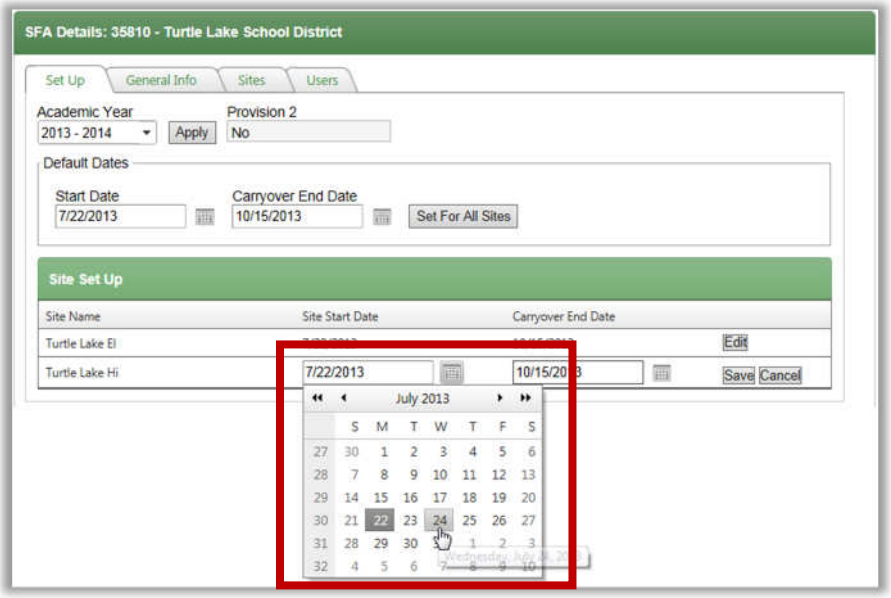
On the **Set Up** tab

- In **Academic Year**, select a year, if needed.
- Click Apply .
- All sites in the SFA are listed in the **Site Set Up** group.



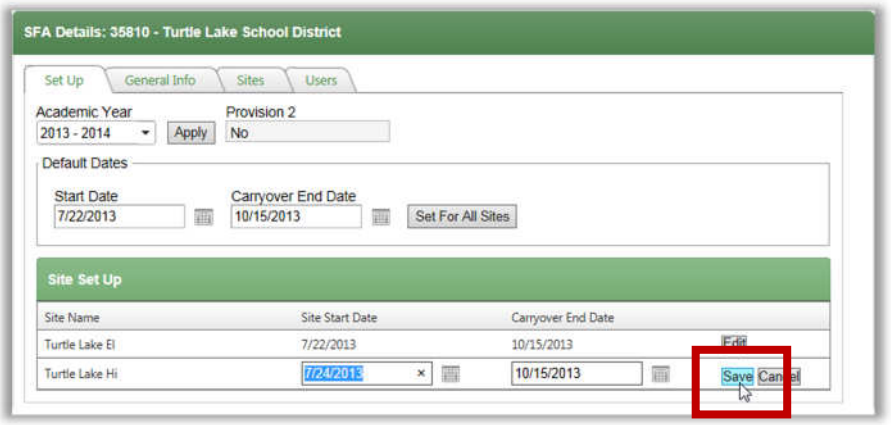
In the **Site Set Up** list

- Click **Edit** in a site listing.



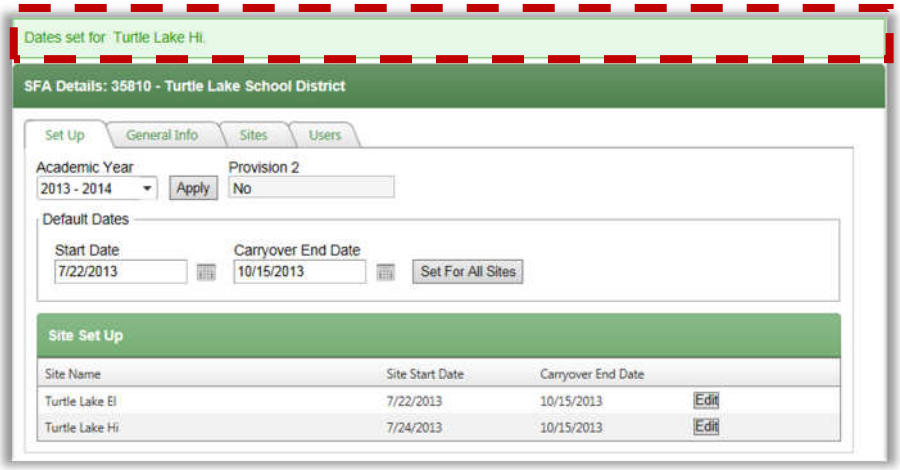
In the **Site Start Date** edit field

- Click **Calendar** ( ) to display the calendar date picker.
- Select a date on the displayed calendar.



In the site listing, do one of the following

- Click **Save** to save the new dates
- Click **Cancel** to discard your changes.

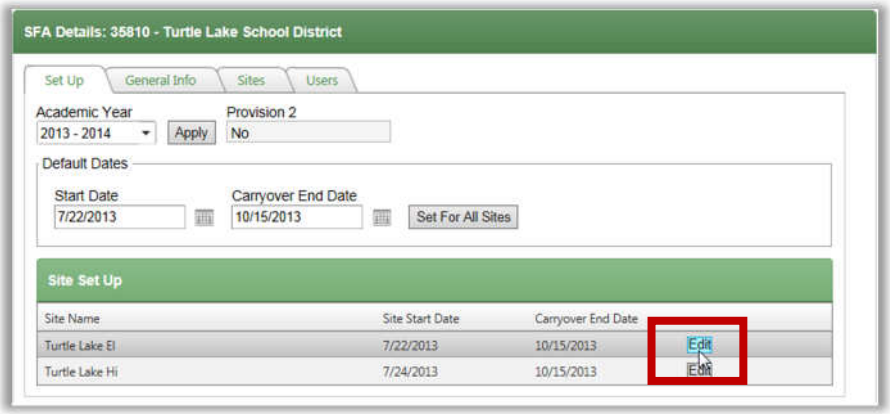


A date set message for the individual site appears.

Setting a Carryover End Date for an Individual Site

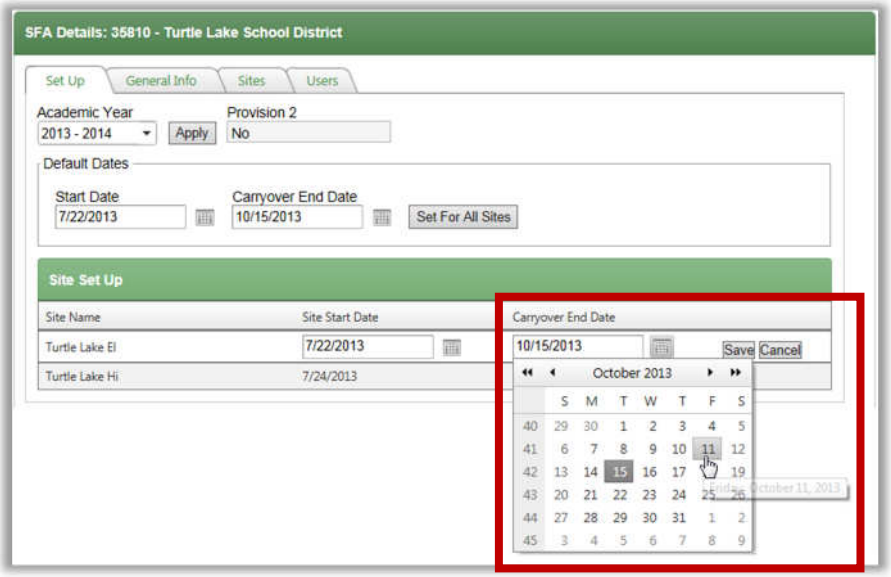
On the **Set Up** tab

- Click Apply .



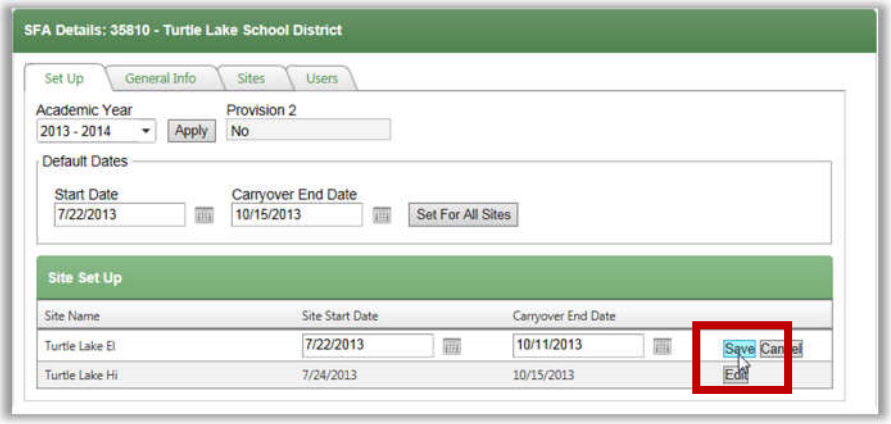
In the **Site Set Up** list

- Click Edit in a site listing.



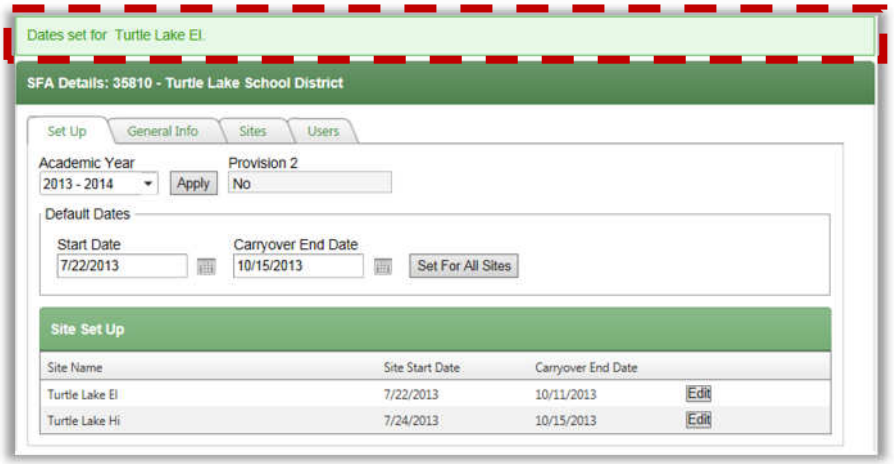
In the **Carryover End Date** edit field

- Click **Calendar** ( ) to display the calendar date picker.
- Select a date on the displayed calendar.



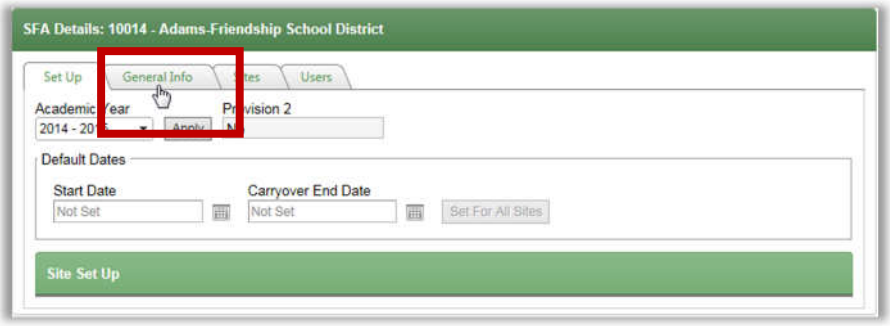
In the site listing, do one of the following

- Click Save to save your changes.
- Click Cancel to discard your changes.



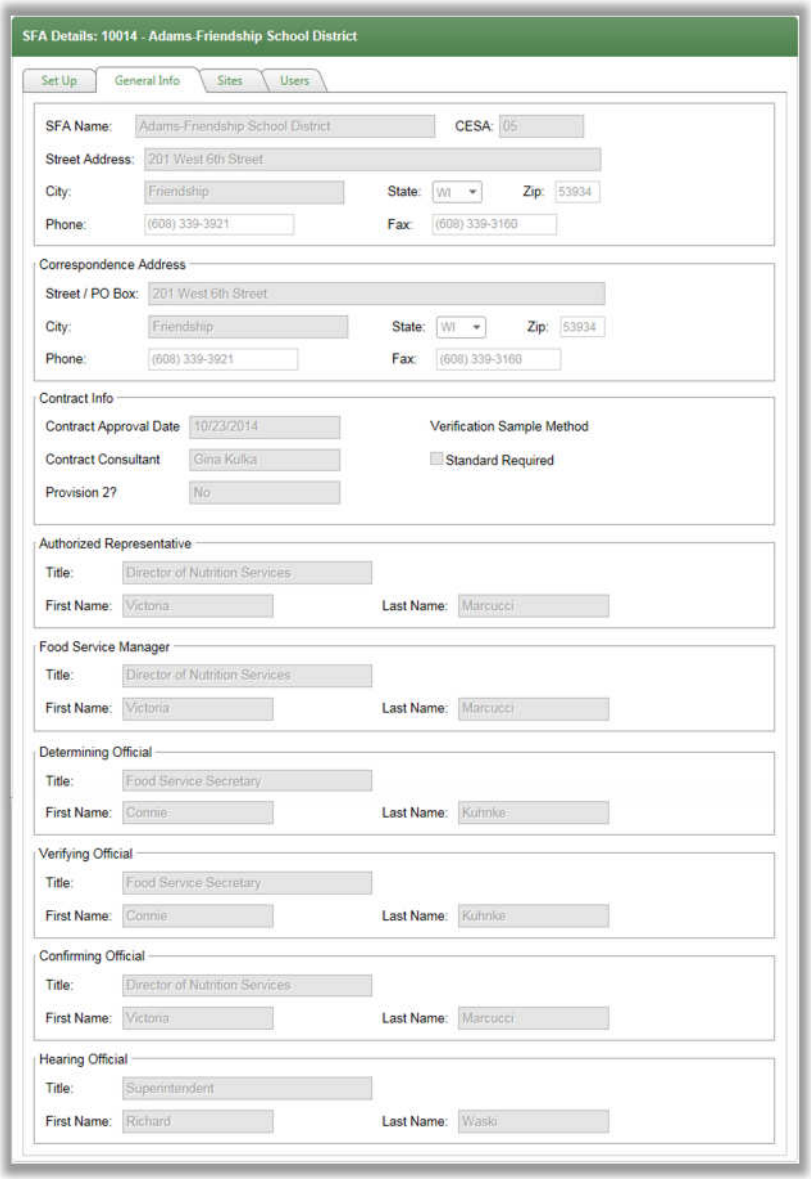
A date set message for the individual site appears.

Displaying General Information for an SFA



On the *SFA Details* page

- Click the **General Info** tab.



The **General Info** tab of the *SFA Details* page appears.

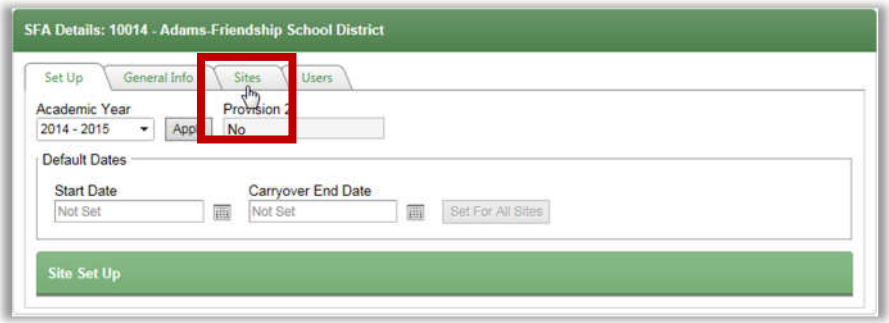
The **General Info** tab lists

- SFA name, physical address and phone
- SFA correspdence address (where to send land mail)
- SFA Contract Info
- Authorized Representative title and name
- Food Service Manager title and name
- Determining Official title and name
- Verifying Official title and name
- Confirming Offical title and name
- Hearing Official title and name

Note

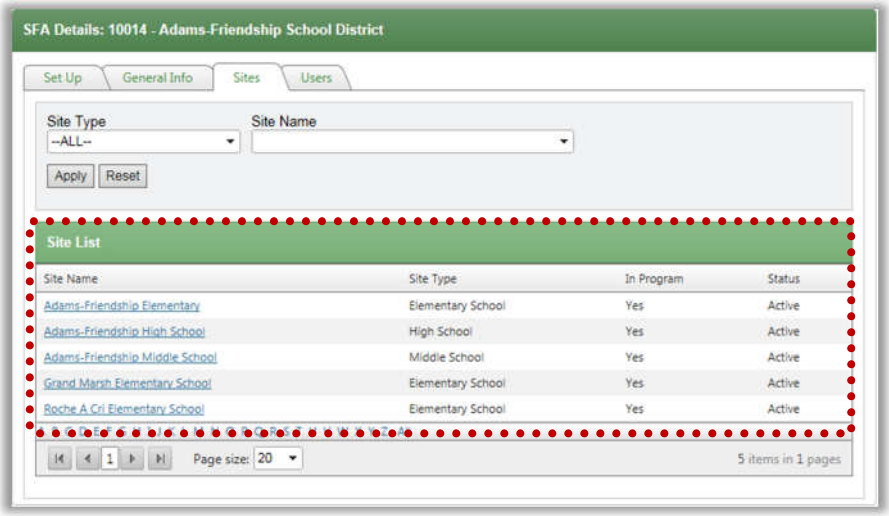
This information is transferred from the DPI contract system and if changed there, is updated automatically.

Displaying All Sites for an SFA



On the *SFA Details* page

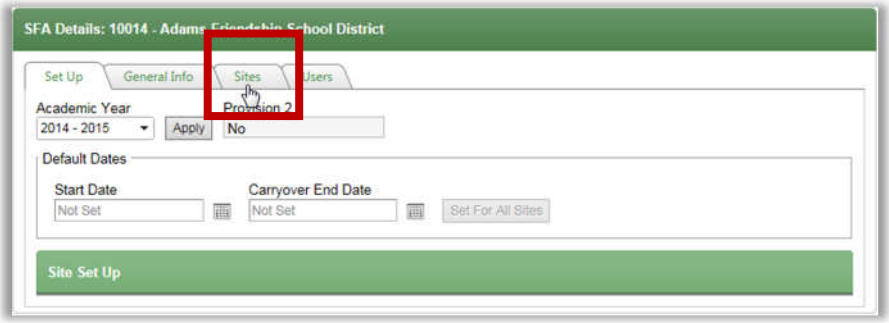
- Click the **Sites** tab.



The **Sites** tab lists all sites included in the selected SFA in the **Site List**.

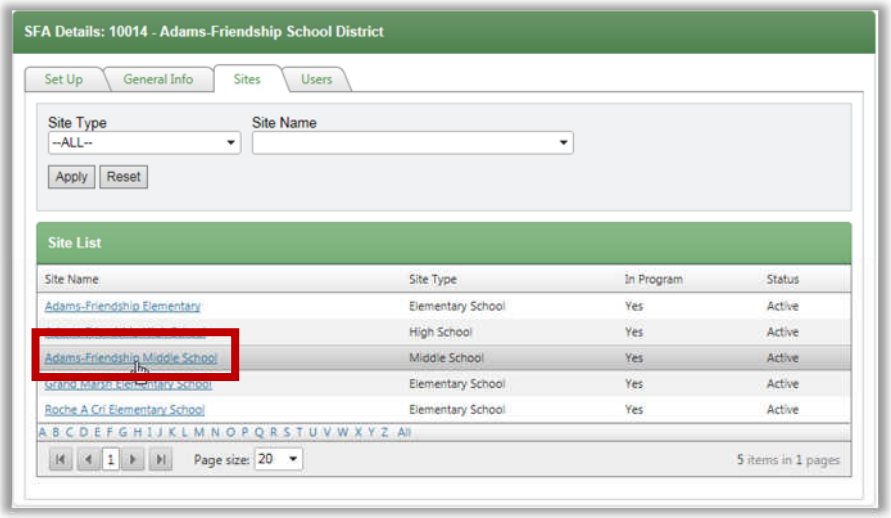
See page 19 for information on working with list controls.

Displaying Site Details



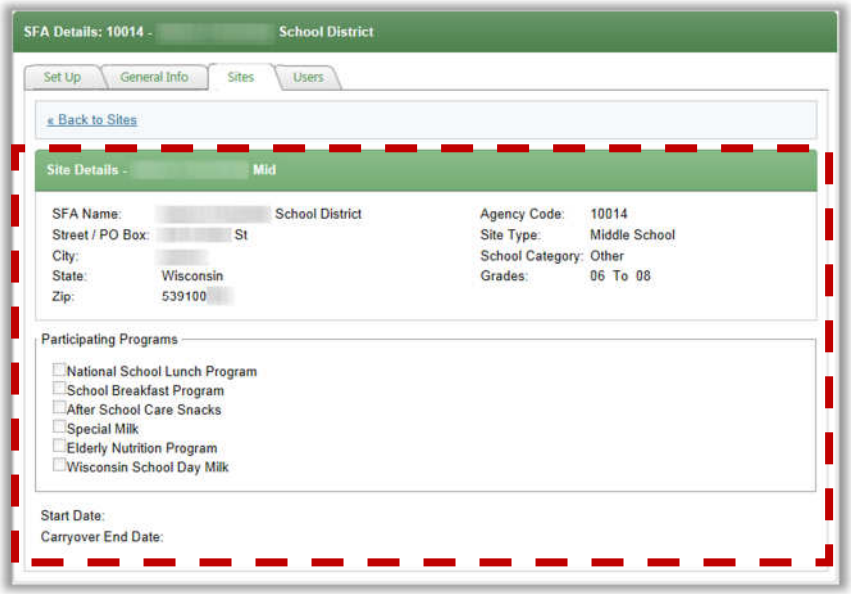
On the *SFA Details* page

- Click the **Sites** tab.



The **Sites** tab lists all sites included in the selected SFA.

See page 19 for information on working with list controls.

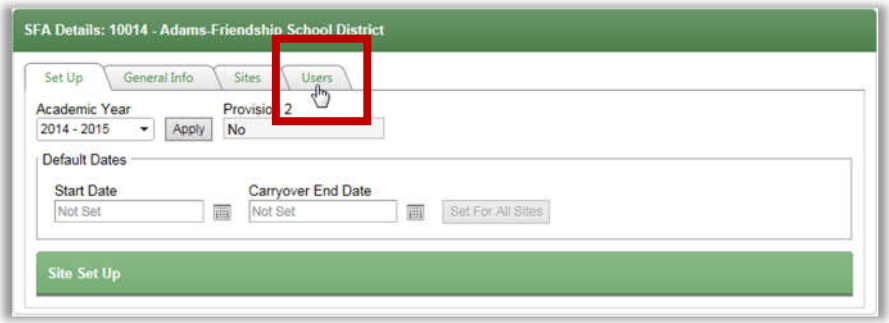


All details for the selected site are displayed.

Note

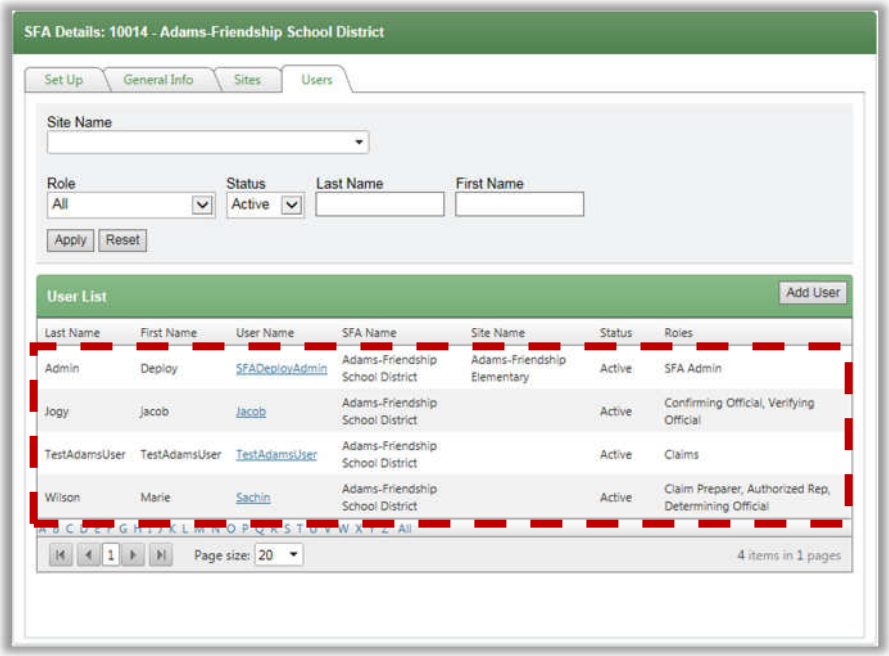
Site details can only be viewed—they cannot be changed on this page. Any changes must come from the DPI contract system.

Displaying All Users Assigned to an SFA



On the *SFA Details* page

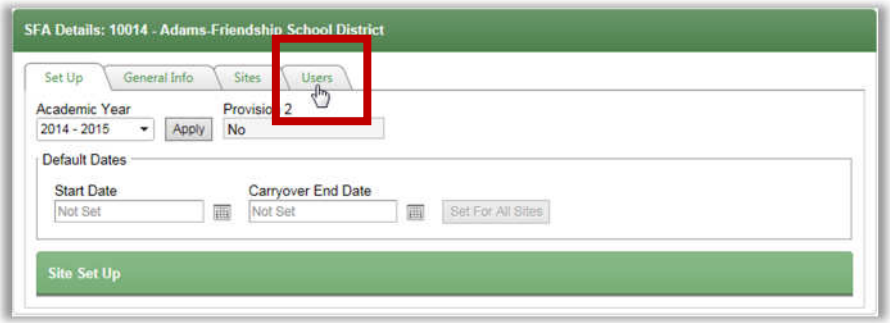
- Click the **Users** tab.



All users assigned to the SFA are displayed in **User List**.

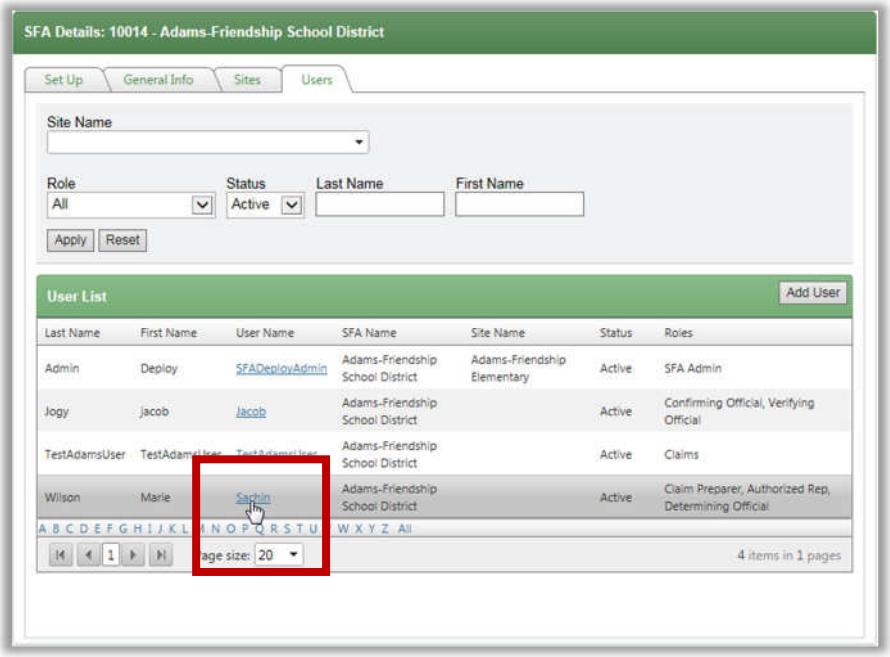
See page 19 for information on working with list controls for lengthy lists.

Displaying User Profile Details



On the *SFA Details* page

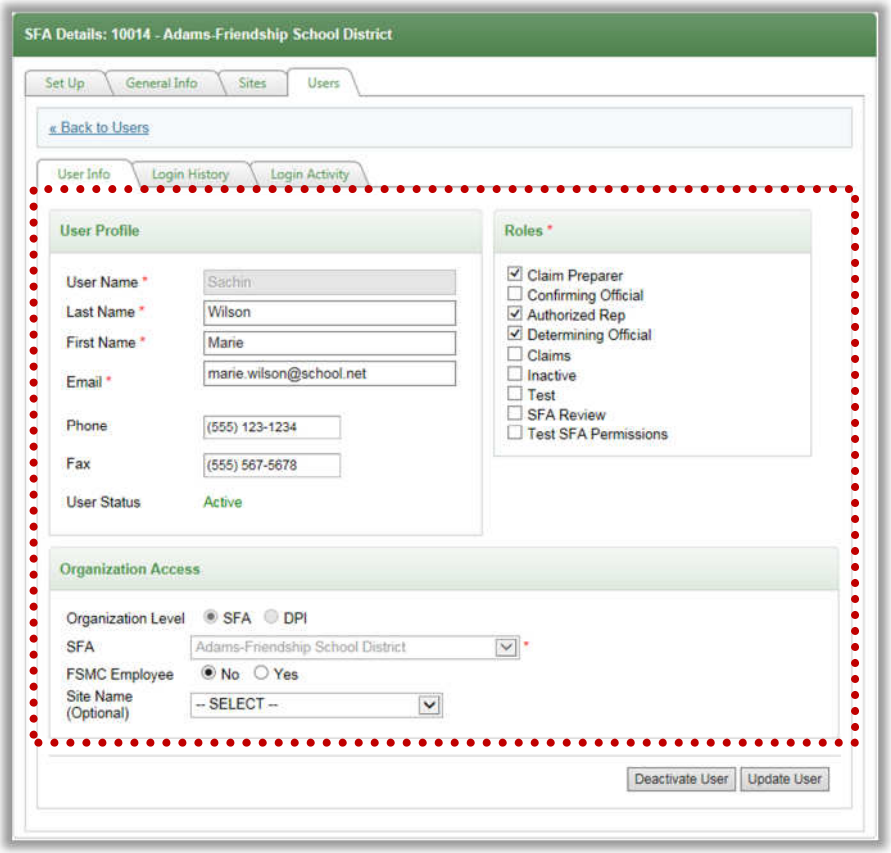
- Click the **Users** tab.



All users assigned to the SFA site are displayed in **User List**.

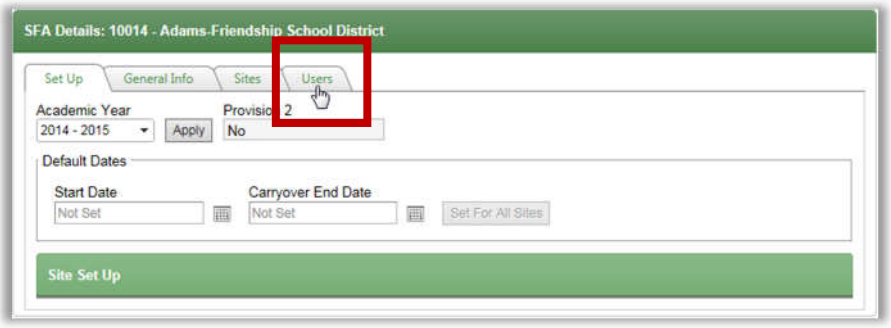
In the **User List**

- Locate the desired User in the **User List**.
- Click a **UserName** link.



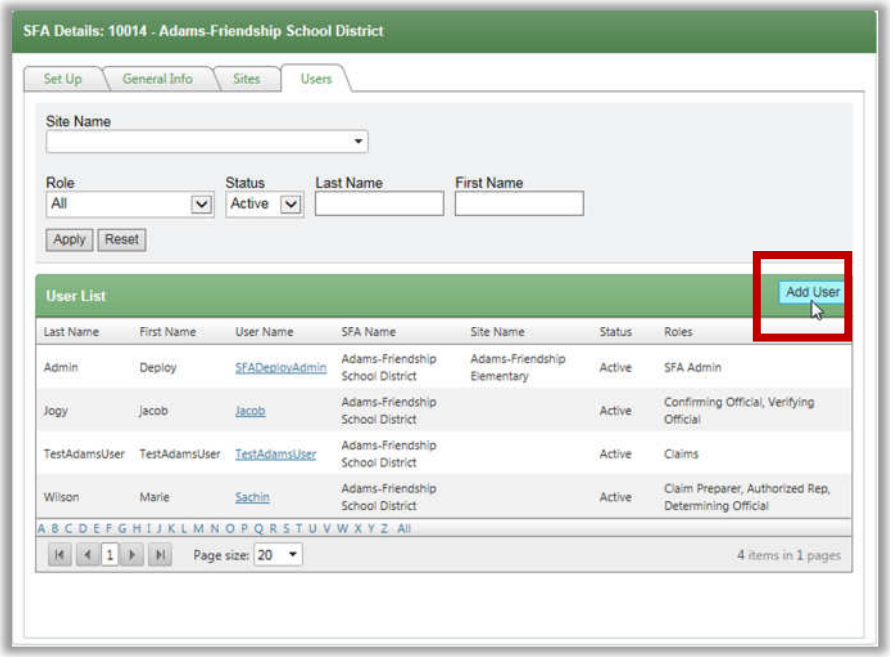
On the **User Info** tab, user profile details are shown.

Adding a User



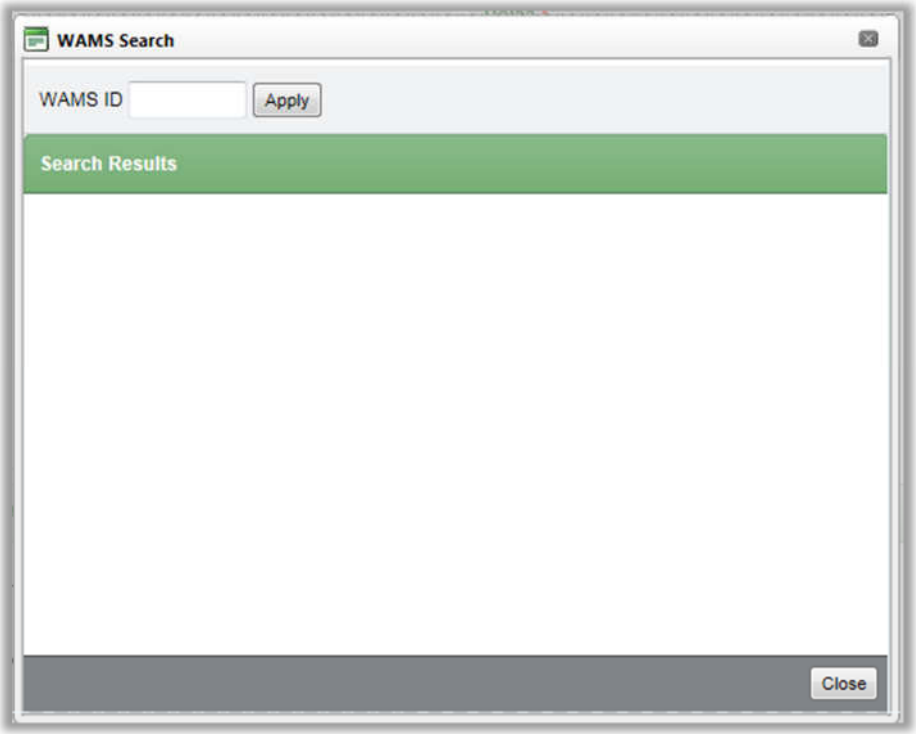
On the *SFA Details* page

- Click the **Users** tab.



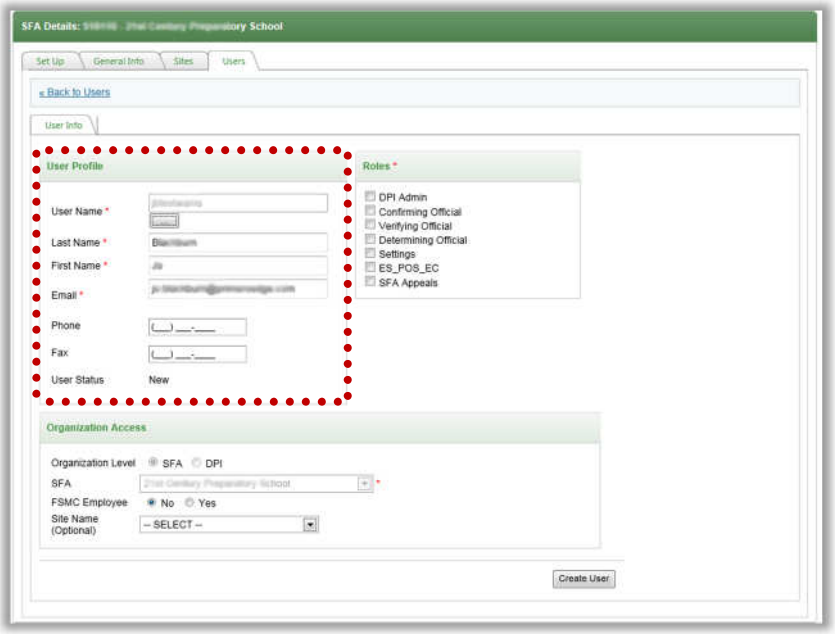
On the *SFA Details* page

- Click **Add User** .



On the *WAMS Search* page

- Enter a valid **WAMS ID**
- Click **Apply**
- Select the WAMS User ID from the grid

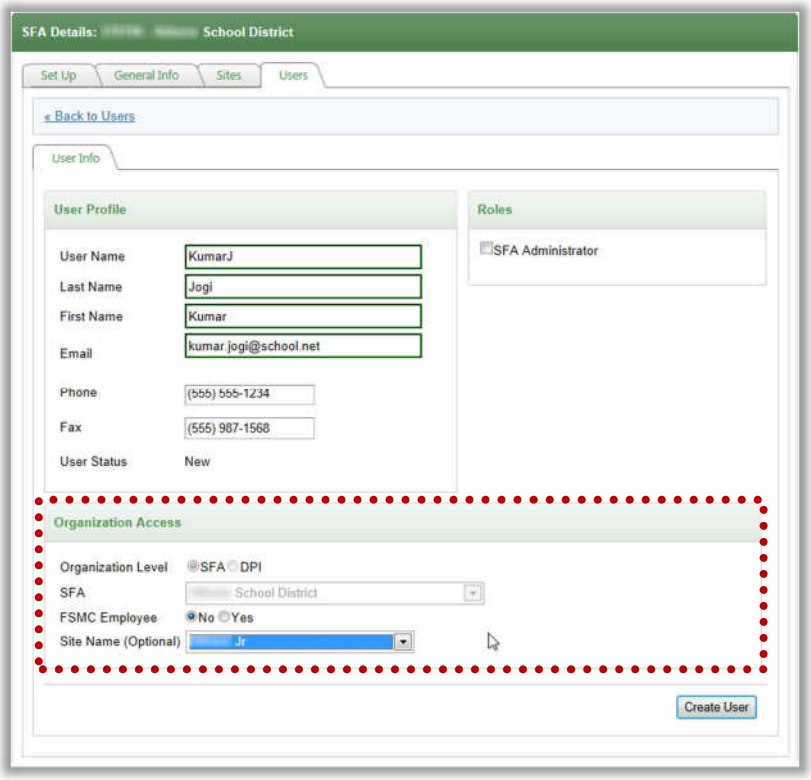


In the **User Profile** group

- **User Name**, **Last Name**, **First Name**, and **Email**, will automatically be populated when a user is selected in WAMS.
- In **Phone**, enter the user's work phone number.
- In **Fax**, enter the user's fax number.

Notes

- The **User Name** field is not available to make changes.
- Required fields are highlighted.
- User Status is "New".

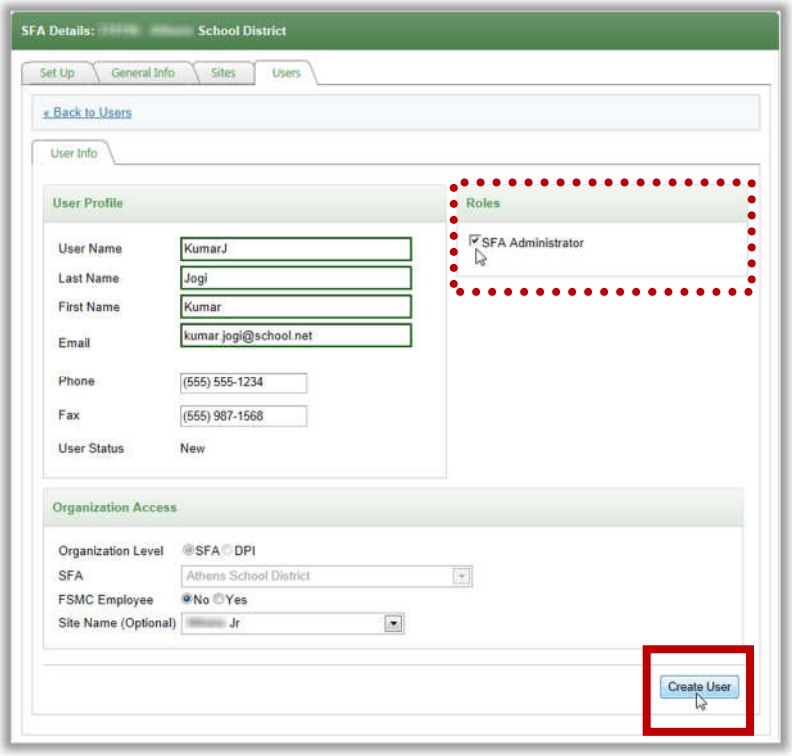


In the **Organization Access** group

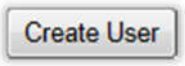
- In **FSMC Employee**, select "**Yes**" if the user is a Food Services Management Company employee; otherwise, leave as "**No**".
- In **Site Name**, select a school—usually the school to which the user is assigned.

Note

Organization Level and **SFA** are not available—selections cannot be made for these fields.



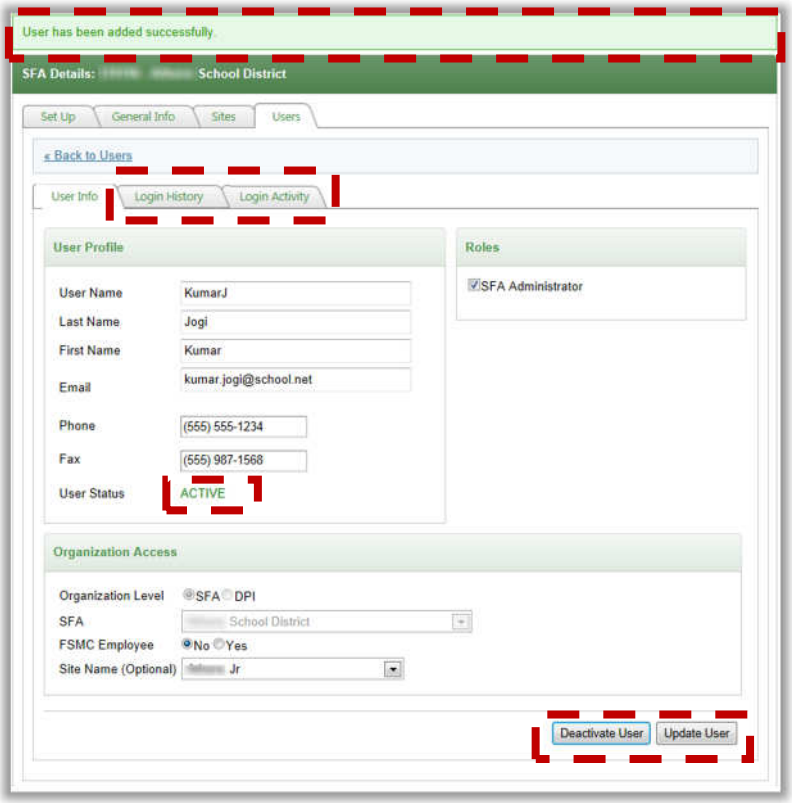
In the **Roles** group

- Select one or more roles as needed to provide the user with the required access.
- Click 

.

Note

The role shown in the example is for example purposes only. You will see different roles in your system from those that are displayed here.



An add success message appears.

The **Login History** and **Login Activity** tabs are added.

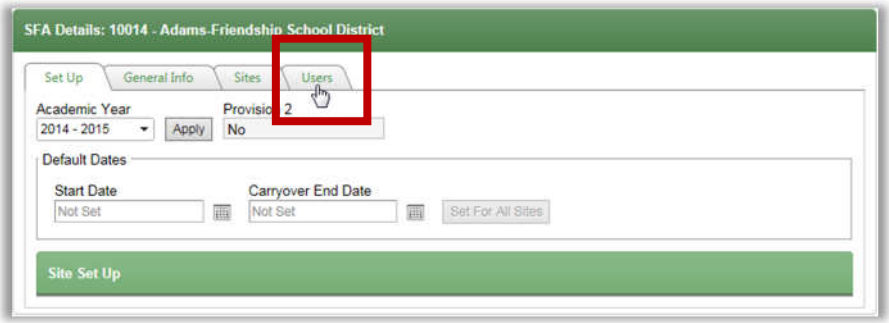
User Status changes to "**ACTIVE**".

Deactivate User and **Update User** buttons appear.

Note

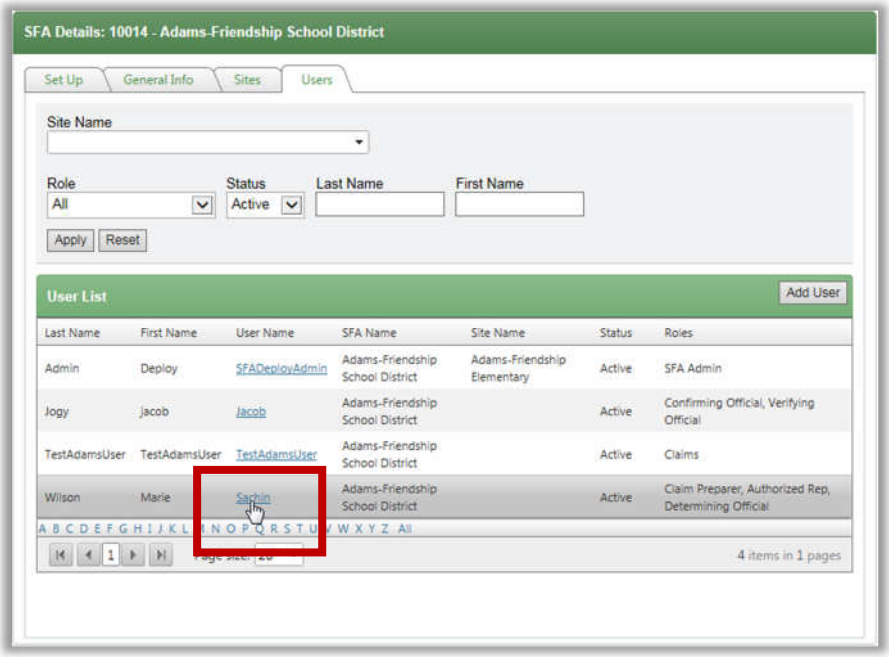
To view the new user in the **User List**, click the << Back to Users link.

Updating User Details



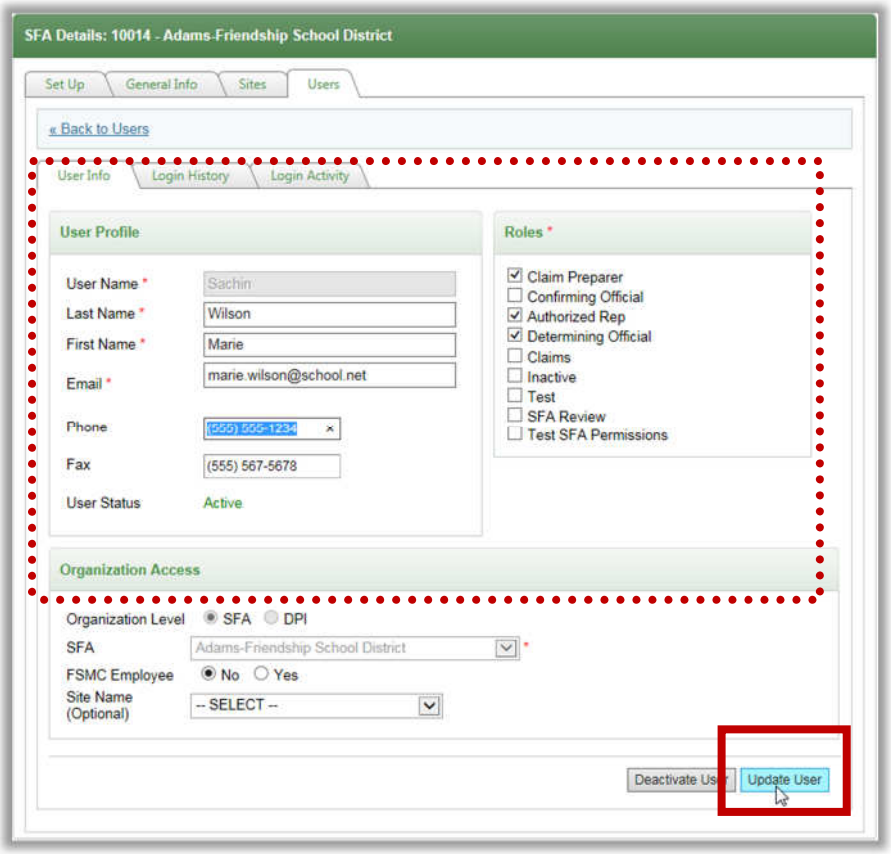
On the *SFA Details* page

- Click the **Users** tab.



On the *SFA Details* page

- Click **User Name** link.

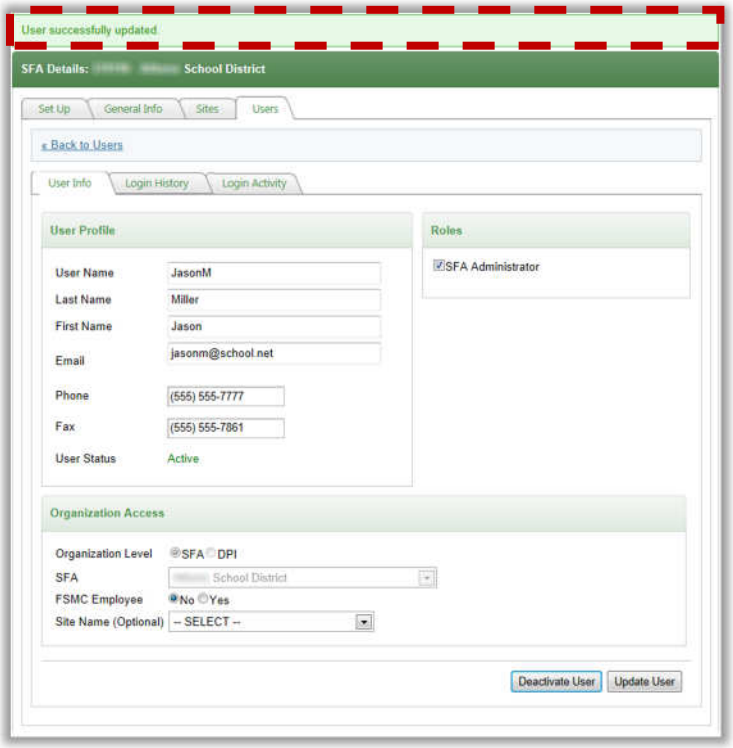


On the *Users* tab

- Make changes as needed.
- Click Update User.

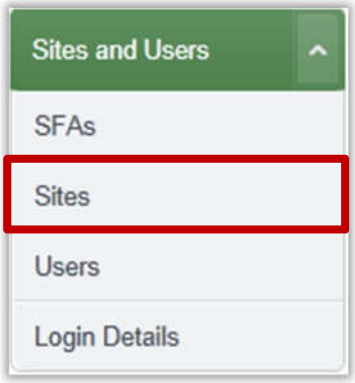
Note

Fields available for update are dependent on your role.



An update success message appears.

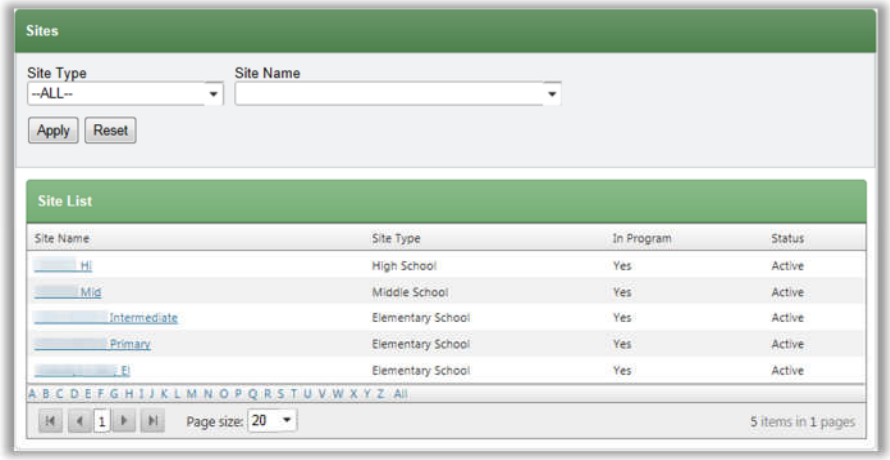
Sites



The **Sites** function is used to display lists of sites by SFA Name, site type or individual site name.

Details for an individual site can be displayed and include:

- Mailing Address
- Agency Code
- Site Type
- School Category
- Grades
- Participating Programs
- (School Year) Start Date
- Carryover End Date



On the *Sites* page, by default:

- **Site Type** is set to "-ALL-".
- **Site Name** is blank.
- **Site List** displays all sites included in the SFA.

Note
The Site List can be quite lengthy.

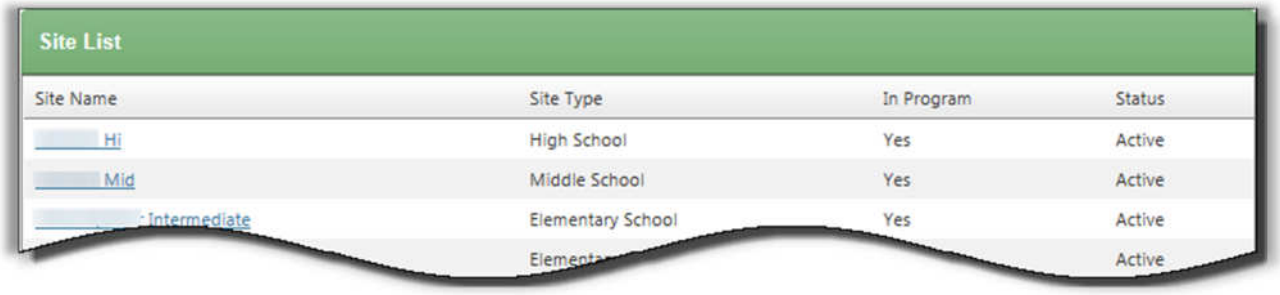
See page 19 for information on working with list controls.

Page Functions

Field/Button	Description
Apply	Click to perform a search with the selected criteria
Reset	Click to clear all selected search criteria

Table 7.3 Sites Page Functions

Listings: Site List

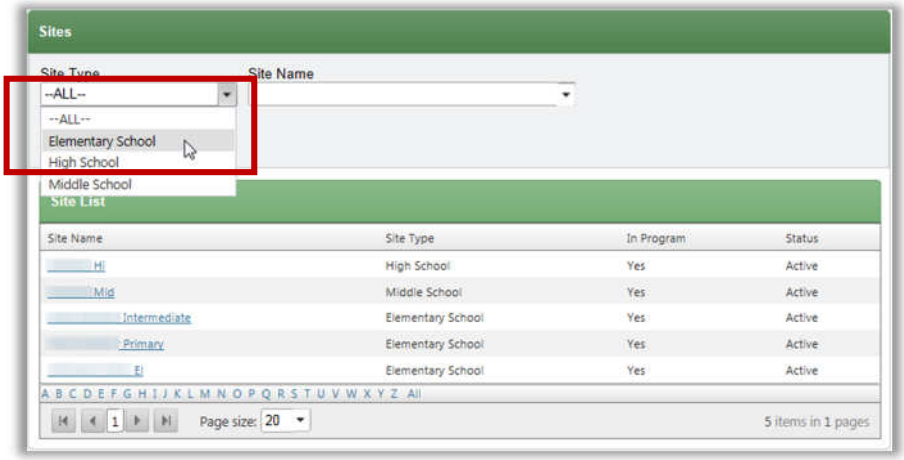


Each listing in the **Site List** includes:

Header Name	Data Type	Description
Site Name	*Clickable link*	*Sortable;* Complete name of the school site.
Site Type	*View only*	*Sortable;* School population served at the site; examples of site types include but are not limited to: Elementary School Middle School High School Elem/Sec Combined RCCI Junior H.S.
In Program	*View only*	*Sortable*; Indicates if site is participating in the school feeding program. ▪ "**Yes**" – Site does participate ▪ "**No**" – Site does not participate
Status	*View only*	*Sortable*; Indicates that the site is currently active in the Contract system.

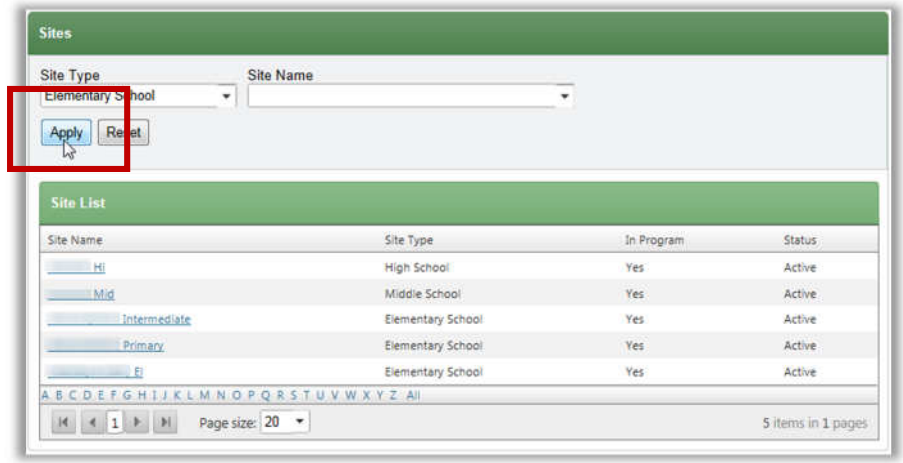
Table 7.4 Site List Listings

Displaying All Sites for a Site Type

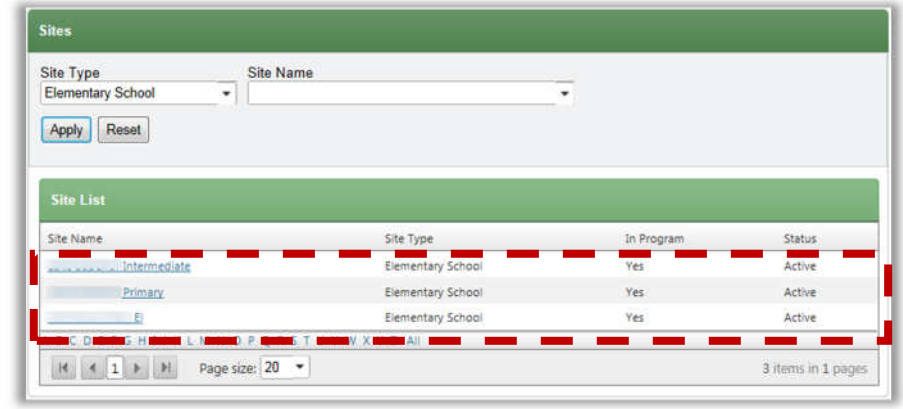


On the *Sites* page

- In **Site Type**, select a type.



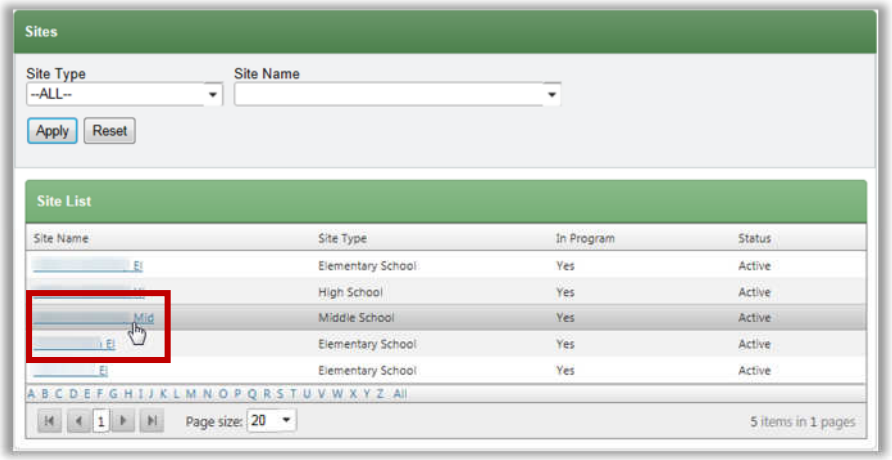
- Click Apply .



All sites included in the SFA for the selected site type are listed.

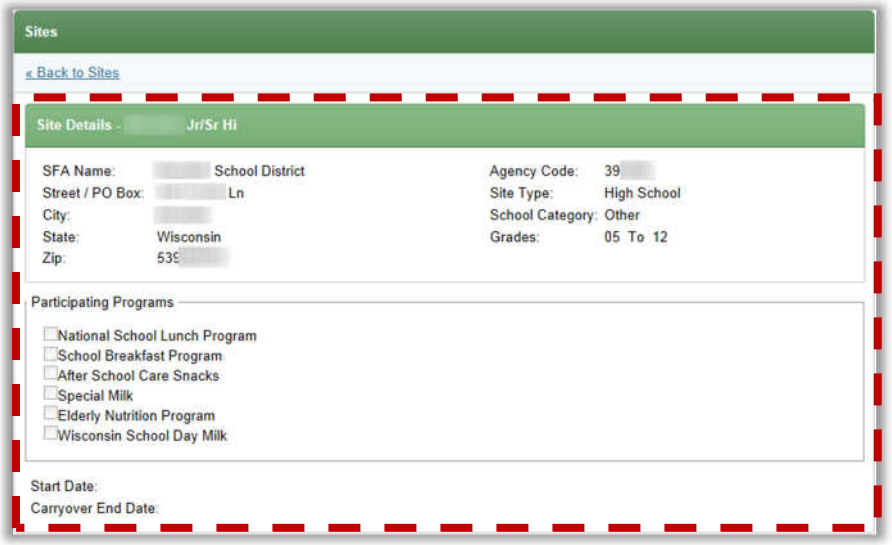
See page 19 for information on working with list controls.

Displaying Site Details



On the *Sites* page

- Select a site name.

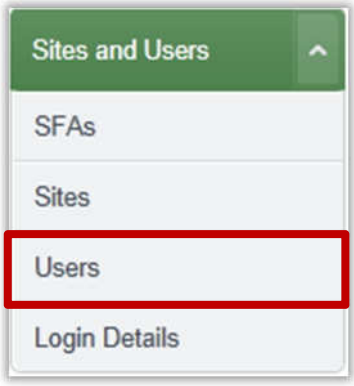


The **Site Details** group appears on the *Sites* page.

Note

Site details can only be displayed on this screen—they cannot be changed. This information is populated based on the Contract system data.

Users



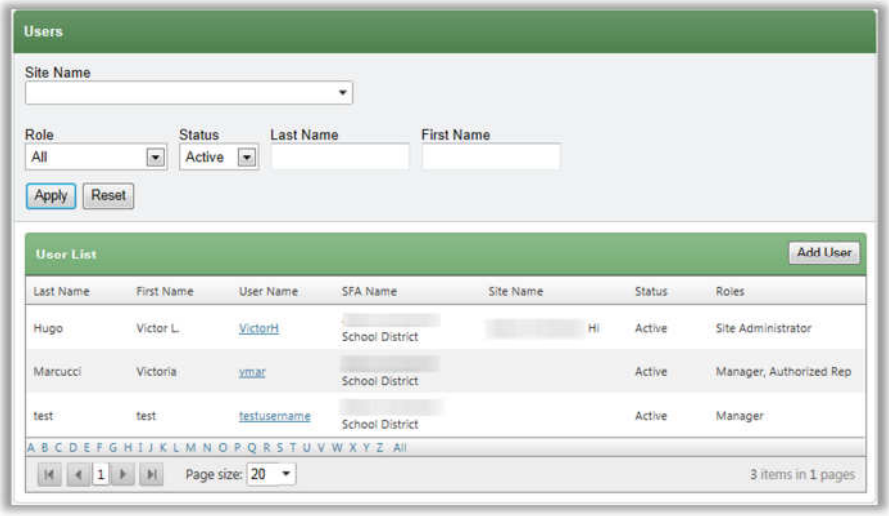
The **Users** function allows you to add, modify and inactivate users and user details with access to SNACS.

User details include three groups of information:

- **Profile data** – includes basic user information such as name and contact information.
- **Roles** – roles specify the menu selection permissions assigned to a User.

  DPI creates Roles.The roles listed in the **Roles** group on the **Set Up** tab or **User Info** tab are dependent on the selection made in **Organization Level** in the **Organization Access** group on the same tabs.
- **Organization Access** – specifies the access level—the default/only selection is "SFA" (local). The user can be designated as a Food Service Management Company employee, and the employee's assigned site can be set.

Note
The **Login History** tab is discussed in the next function, **Login Details**.



By default on the *Users* page

- **Site Name** is blank (empty).
- **Role** is set to "All".
- **Status** is set to "Active".
- **Last Name** and **First Name** are blank (empty).
- All users are displayed in the **User List**

Note

The **User List** can be quite lengthy. To manage the list of users

- Click on a directory alpha button.
- Change the number of listings in **Page size**.
- Click on a page number.

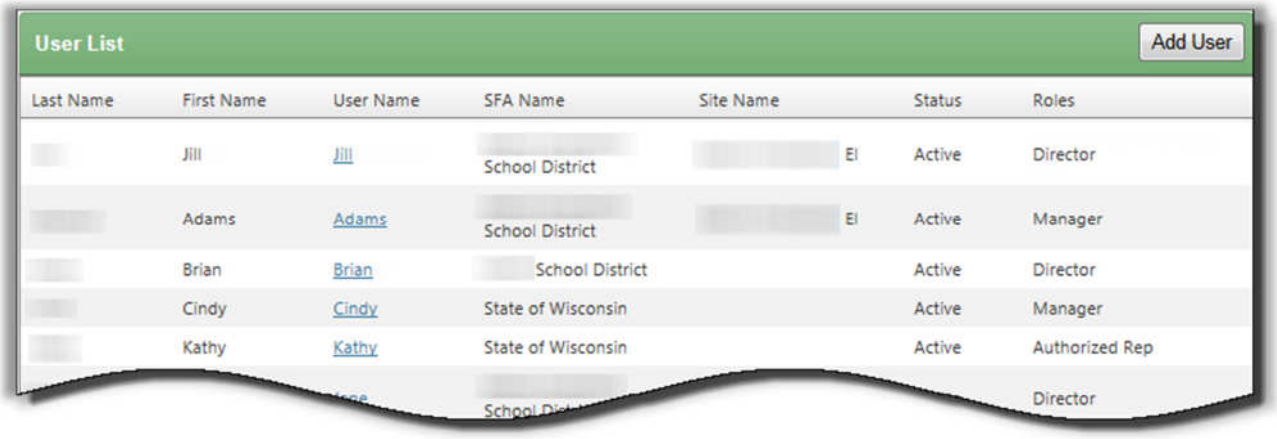
See page 19 for more information on working with list controls.

Page Functions

Field/Button	Description
Apply	Click to retrieve a list of users matching the selected/entered criteria.
Reset	Click to clear all entered/selected search criteria.
Add User	Click to start the add user process.

Table 7.5 Users Page Functions

Listings: User List

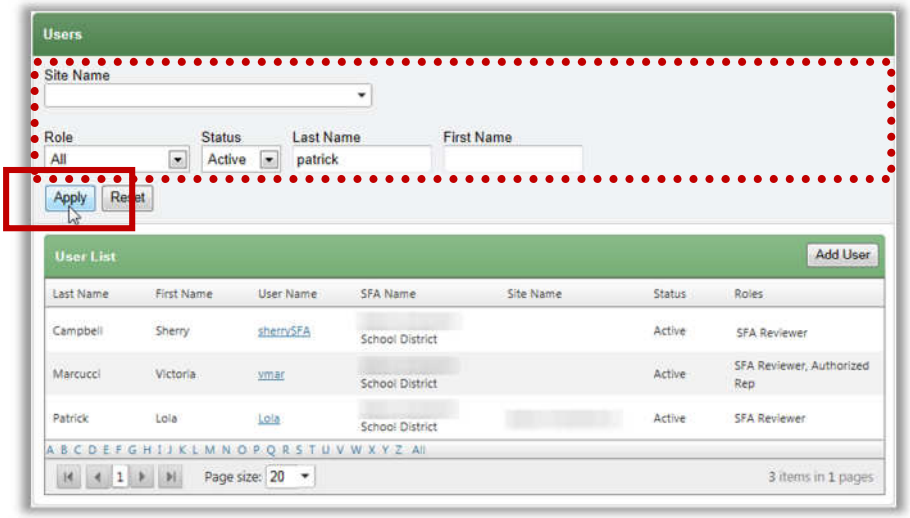


Each listing in **User List** includes:

Header Name	Data Type	Description
Last Name	*View only*	*Sortable*; User's last name
First Name	*View only*	*Sortable*; User's first name
User Name	***Clickable link***	*Sortable*; User login name Click this link to display the User Profile.
SFA Name	*View only*	*Sortable*; School Food Agency name
Site Name	*View only*	*Sortable*; Site name to which the user is assigned.
Status	*View only*	*Sortable*; Indicator of user's current activity in the Reviews system Possible values: Active, Inactive
Roles	*View only*	*Sortable*; List of all roles assigned to user

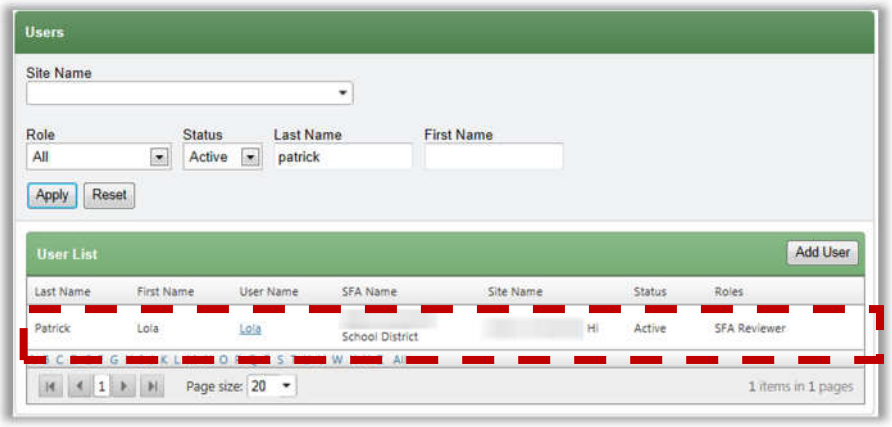
Table 7.6 User List Listings

Displaying a User



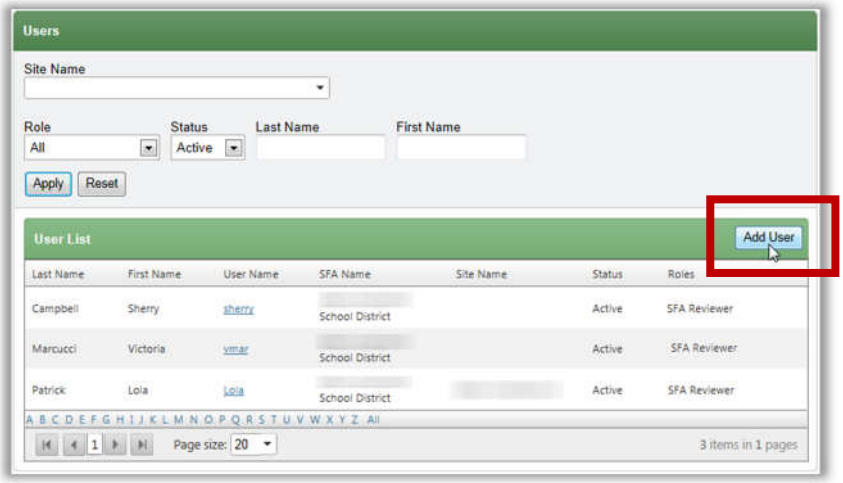
On the *Users* page

- In one or more search-condition fields, enter or select criteria as needed.
- Click Apply .



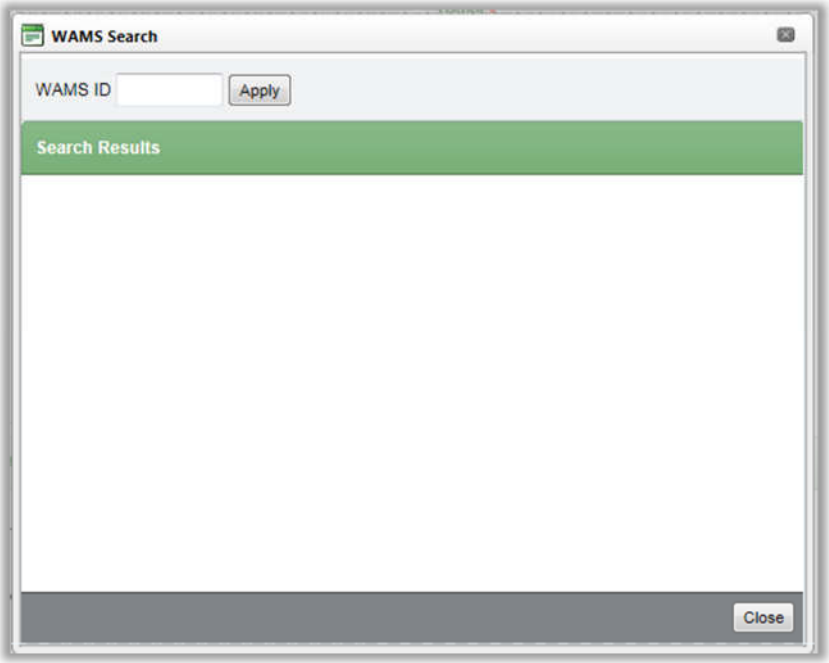
In this example, the user with "Patrick" for a last name is displayed in the **User List**.

Adding a New User



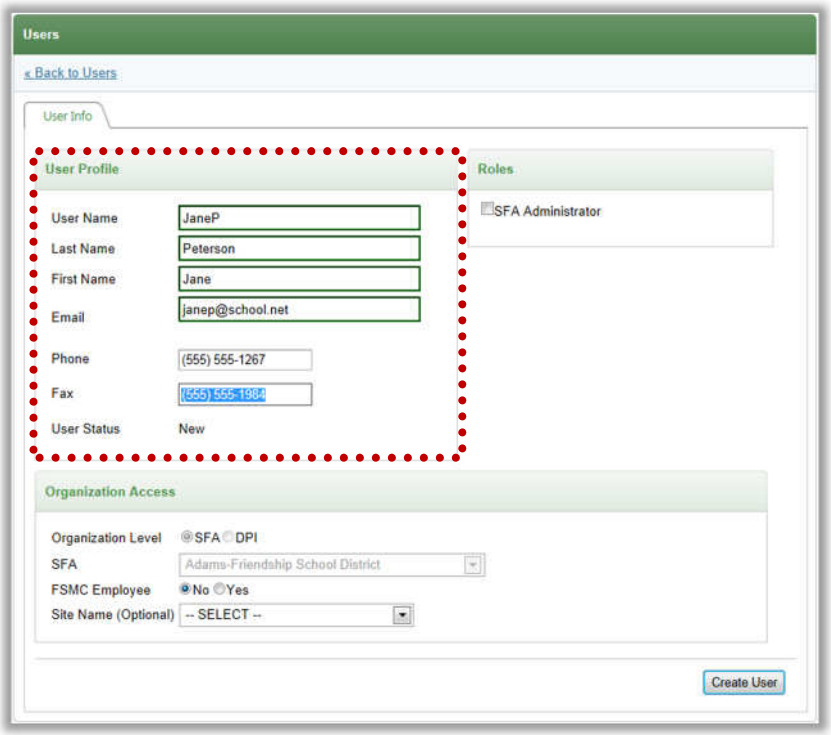
On the *Users* page

Click Add User.



On the *WAMS Search* page

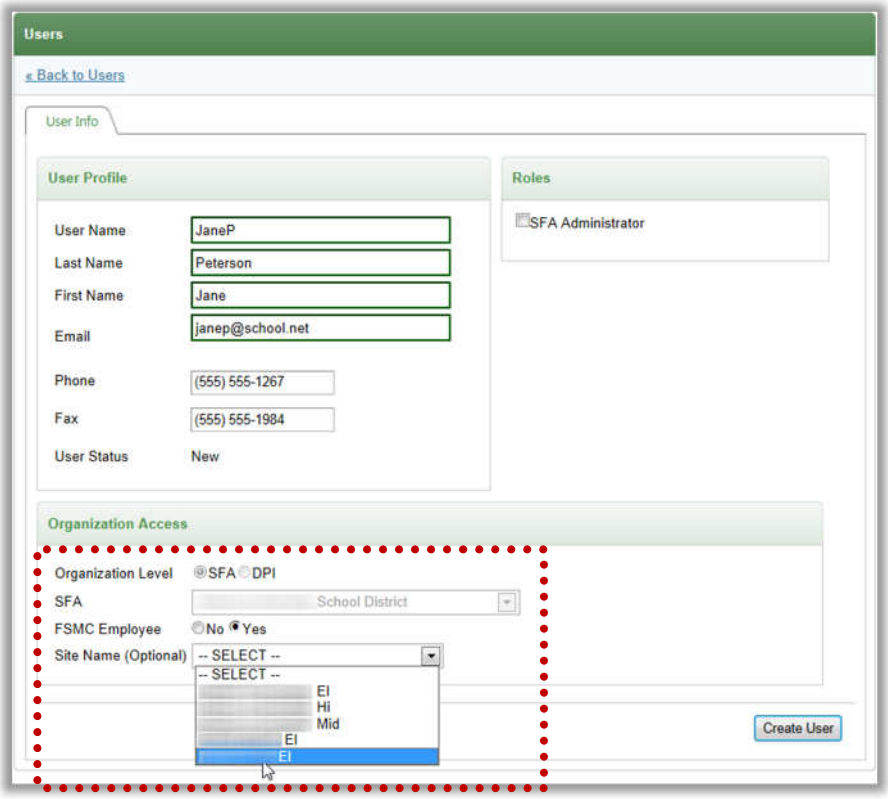
- Enter a valid **WAMS ID**
- Click Apply.



In the **User Profile** group

- **User Name**, **Last Name**, **First Name**, and **Email**, will automatically be populated when a user is selected in WAMS.
- In **Phone**, enter the user's work phone number.
- In **Fax**, enter the user's fax number.

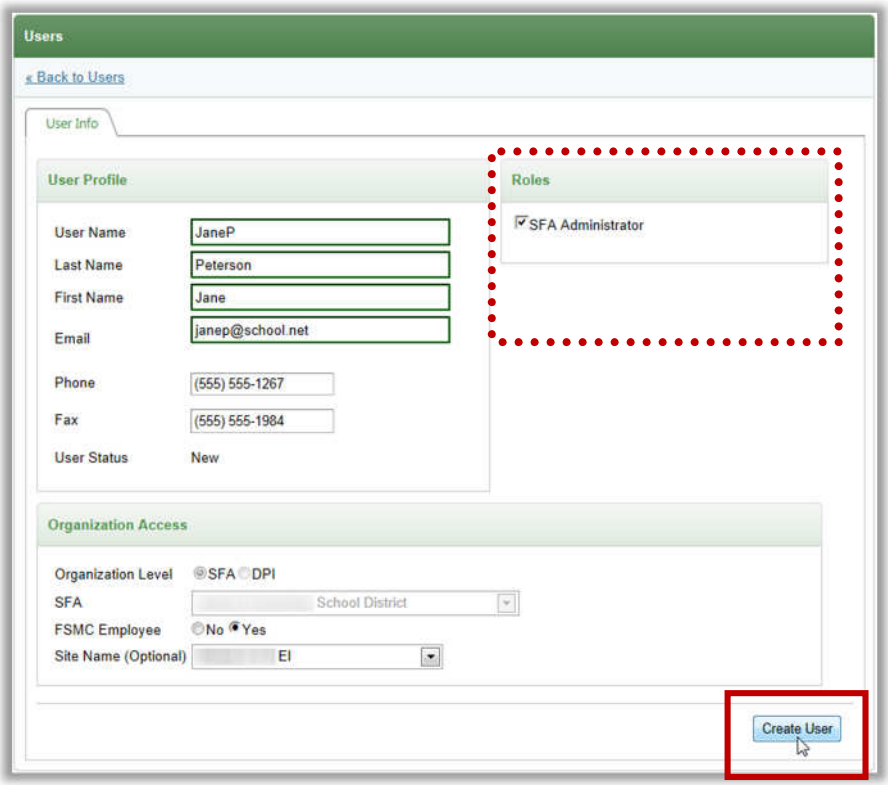
Note
Required fields are highlighted.



In the **Organization Access** group

- In **FSMC Employee**, select "Yes", if needed to designate a Food Service Management Company employee.
- In **Site Name**, select a site.

Note
Organization Level and **SFA** are not available for selection.

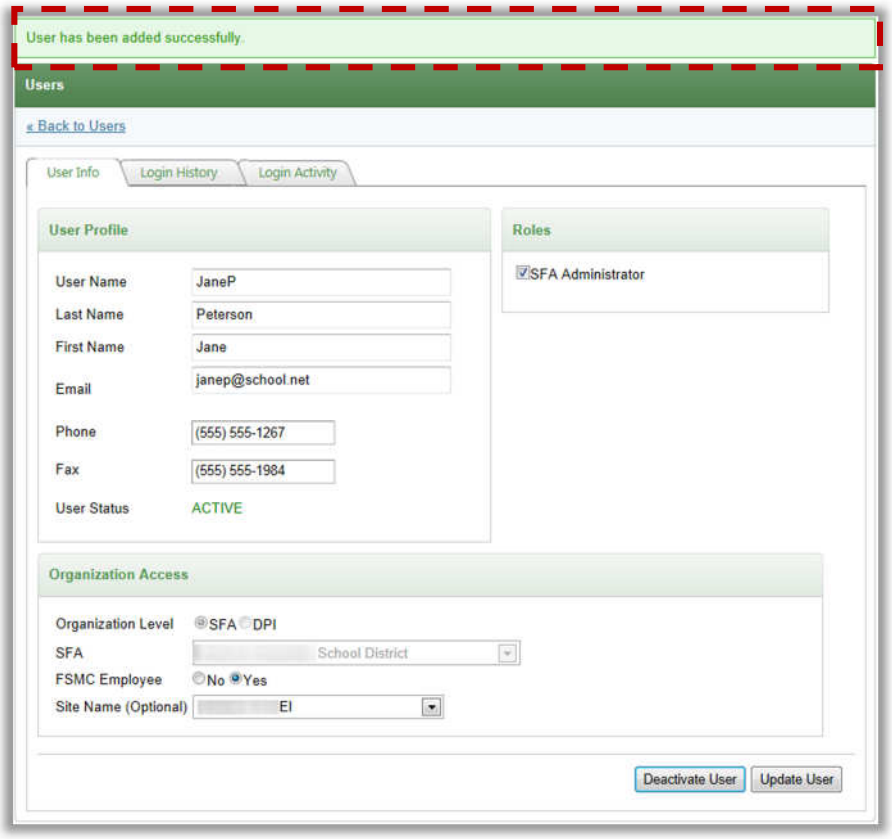


In the **Roles** group

- Select a role to assign to the User.

On the *Users* page

- Click Create User .



An add success message appears.

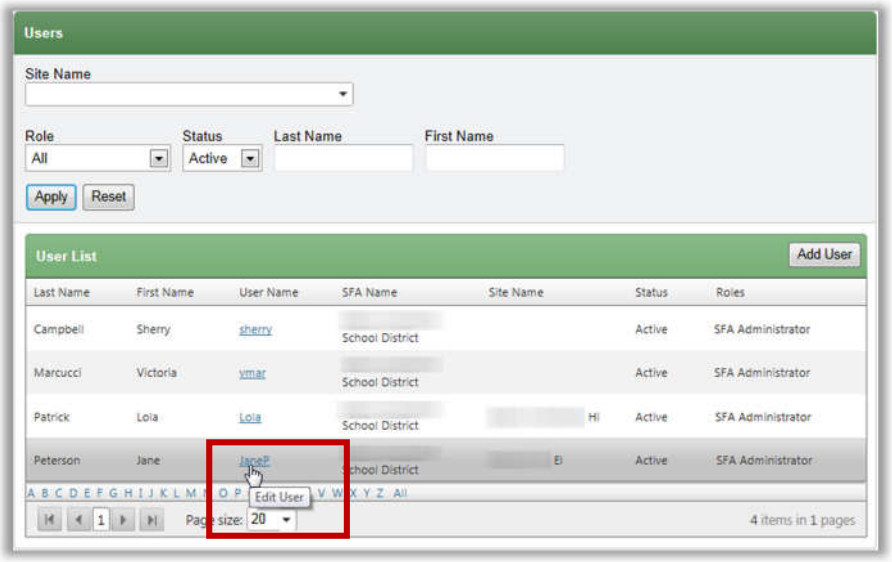
Two new tabs appear

- Login History
- Login Activity

The **User Status** changes to "**ACTIVE**".

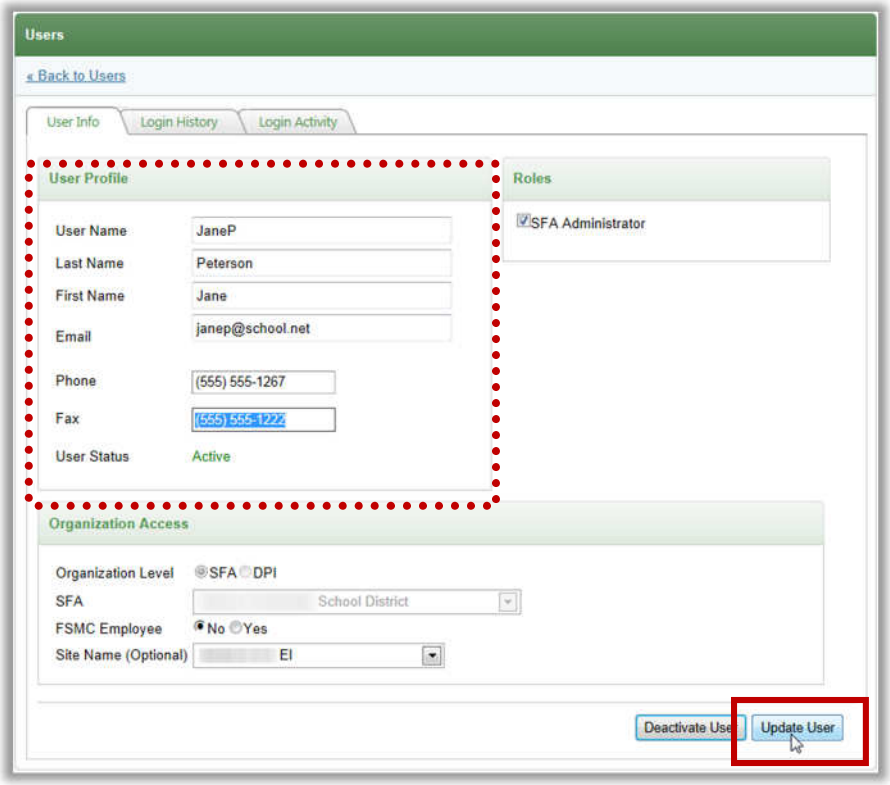
Note
To view the new user in the **User List**, click the **<< Back to Users** link.

Updating User Details



On the *Users* page

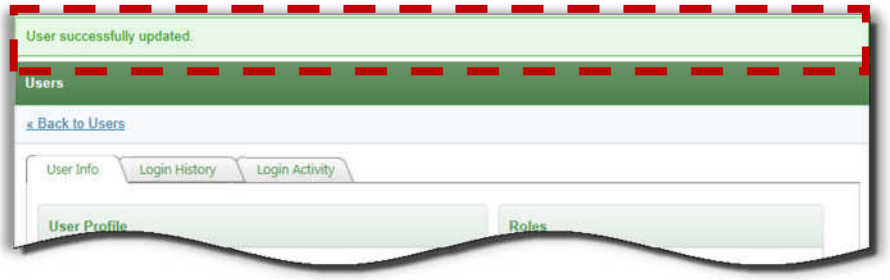
- Click a **User Name** link.



On the *Users* page

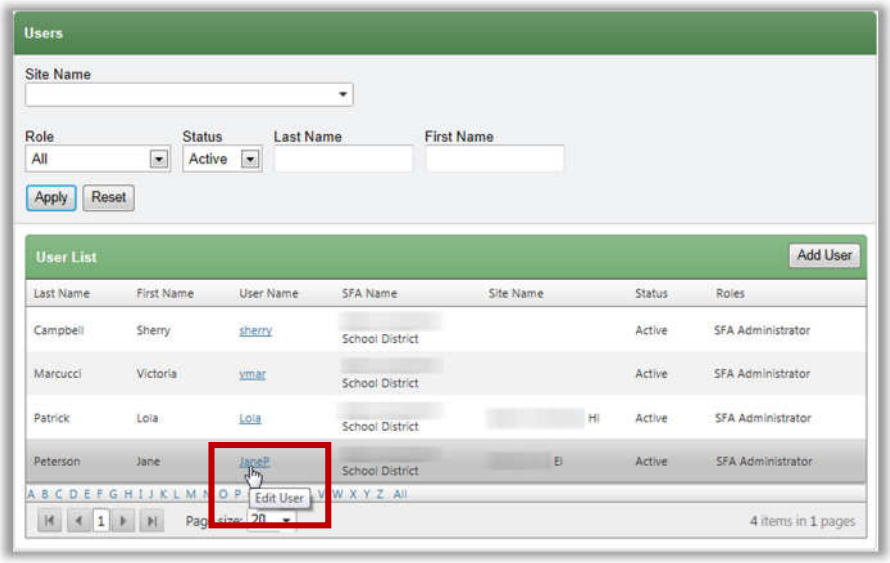
- Make changes as needed.
- Click **Update User** .

Note
Fields available for update is dependent on your role.



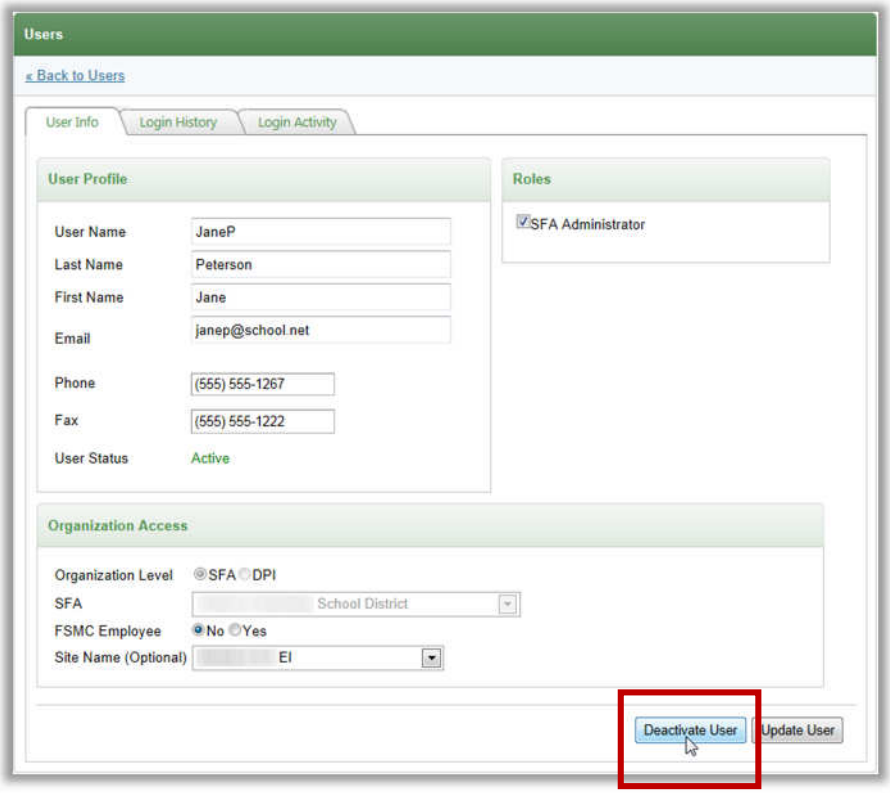
An update success message appears.

Deactivating a User

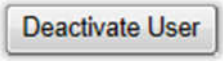


In the **Users** list

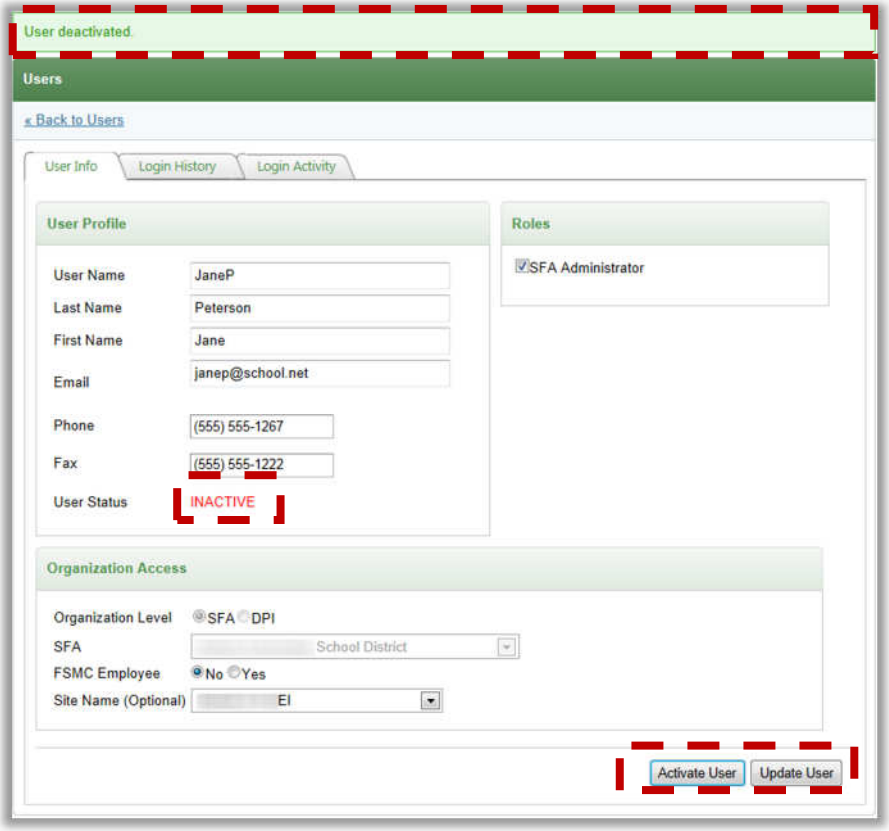
- Locate the desired User in the **User List**.
- Click a **User Name** link.



On the *Users* page

- Click 

.

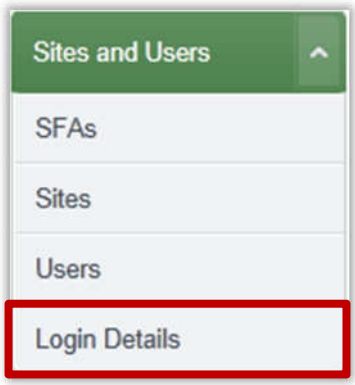


A deactivated message appears.

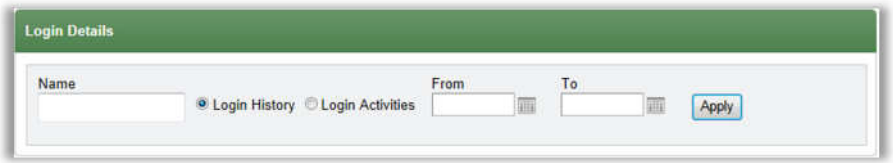
"**INACTIVE**" appears in **User Status**.

The Activate User button replaces the Deactivate User button.

Login Details



Login Details displays log in and log out dates and times for a selected user.



By default on the *Login Details* page

- **Name, From**, and **To** are empty (no selections set).
- "Login History" is selected.

Page Functions

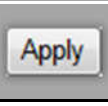
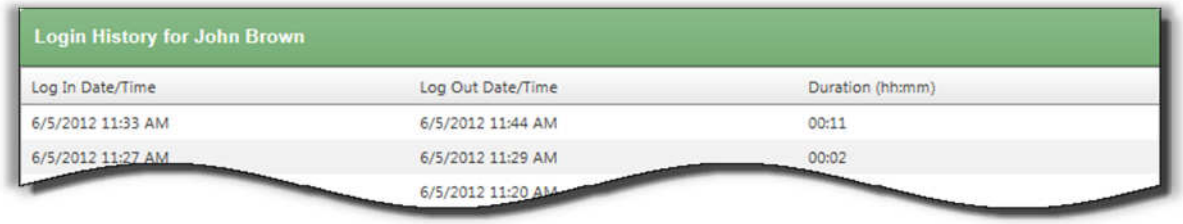
Field/Button	Description
	Click to display a calendar to pick a date.
	Click to retrieve data with the requested details.

Table 7.7 Login Details Page Functions

Listings: Login History

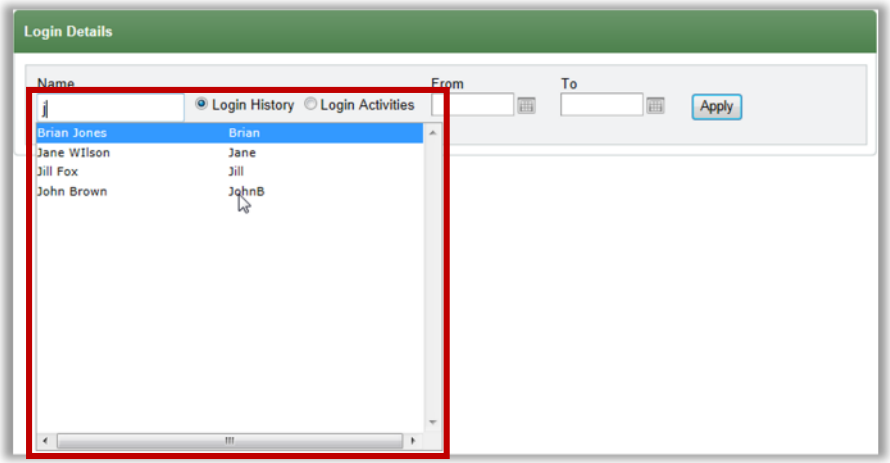


Each listing in **Login History** includes:

Header Name	Data Type	Description
Log In Date/Time	*View only*	Date and time of each log in
Log Out Date/Time	*View only*	Date and time of each log out
Duration (hh:mm AM/PM)	*View only*	Total time user was logged into SNACS

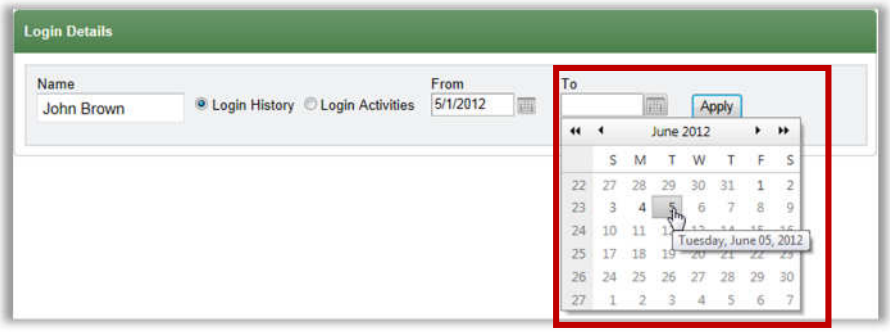
Table 7.8 Login History Listings

Displaying User Login History



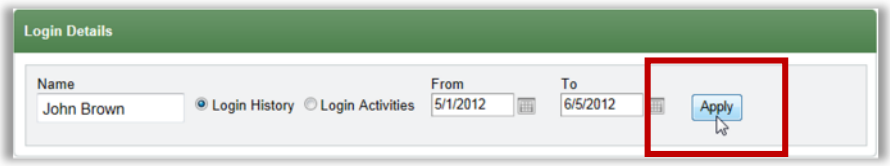
On the *Login Details* page

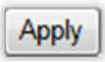
- In **Name**, begin entering the user's first or last name.
- When the list of names appears, either select a name or continue entering characters to narrow the list of names before selecting a name.



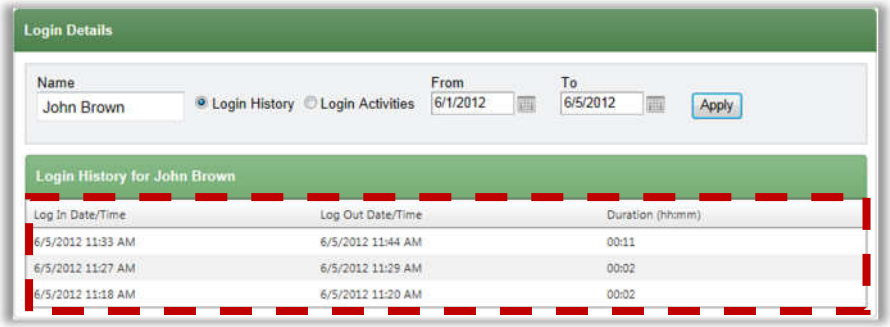
On the *Login Details* page

- In **From**, enter or select a beginning date for the date range to display.
- In **To**, enter or select an ending date for the date range to display.



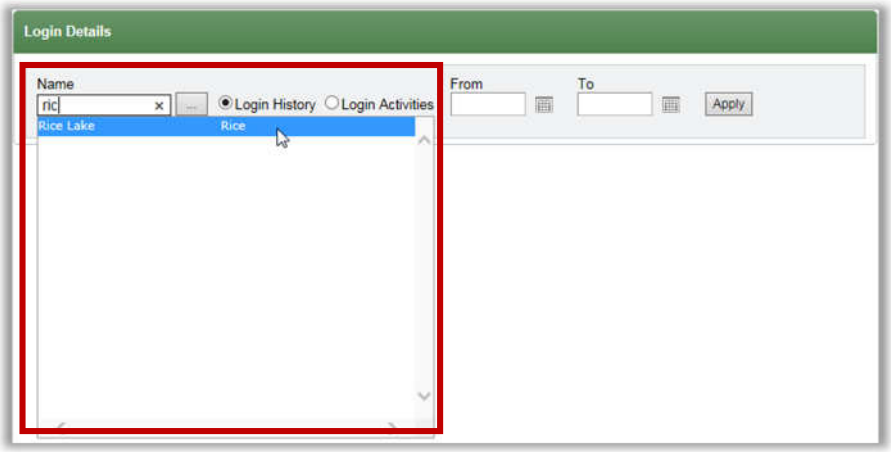
- Click 

.



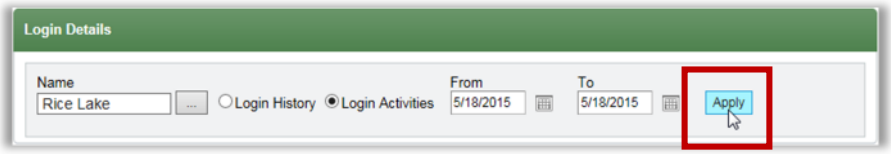
All Log In and Log Out records for the selected time period are listed.

Displaying User Login Activities



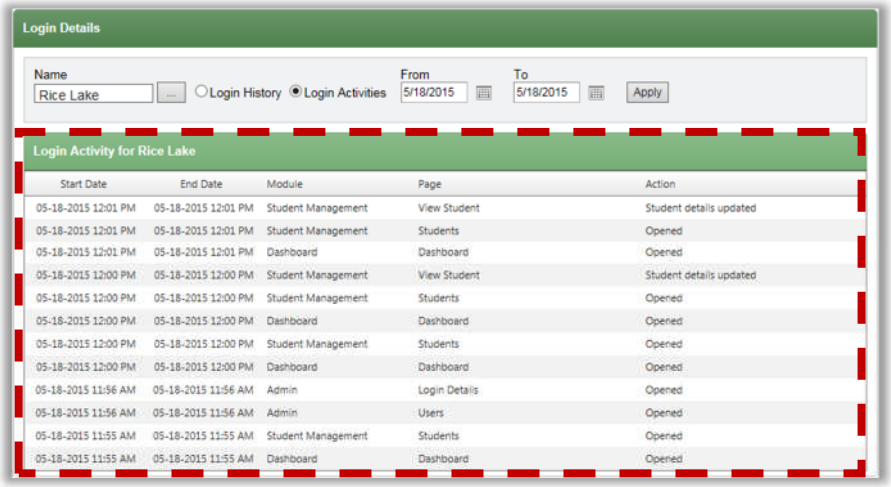
On the *Login Details* page

- In **Name**, begin entering the user's first or last name.
- When the list of names appears, either select a name or continue entering characters to narrow the list of names before selecting a name.
- Or, use the **Lookup** button to search for a name.



On the *Login Details* page

- Select **Login Activities**.
- In **From**, enter or select a beginning date for the date range to display.
- In **To**, enter or select an ending date for the date range to display.
- Click Apply.



All user login activity for the selected time period are listed.

End of Chapter

Chapter 8: Admin—Management

In this chapter you will learn how to:

- ✓ View current and past reimbursement rates for Free, Reduced Price and Paid meals.
- ✓ View current and past Income Eligibility Guidelines (IEGs) for Free and Reduced Price meals.
- ✓ Print a report of Income Eligibility Guidelines for a selected academic year.
- ✓ View import codes assigned to feeding sites in an SFA for use in an import file.
- ✓ Add an import code for a feeding site to identify the site for an import file.

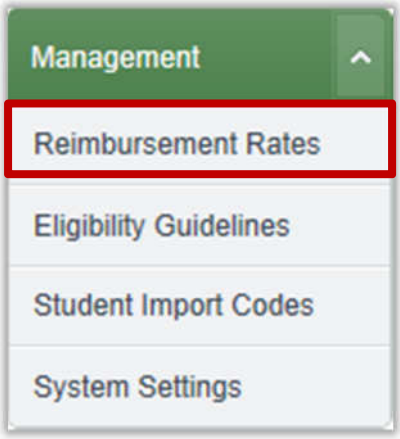
Management at a Glance

Menu Selection	Description
Reimbursement Rates	View Reimbursement Rates for Free, Reduced Price and Paid.
Eligibility Guidelines	View or print a report of Income Eligibility Guidelines (IEGs) used in determining eligibility for Free and Reduced Price meals.
School Import Codes	View and add codes assigned to feeding sites in an SFA for use in an import file.
System Settings	Manage settings to specify the availability or limits for a feature.

Table 8.1 Management Menu Selections

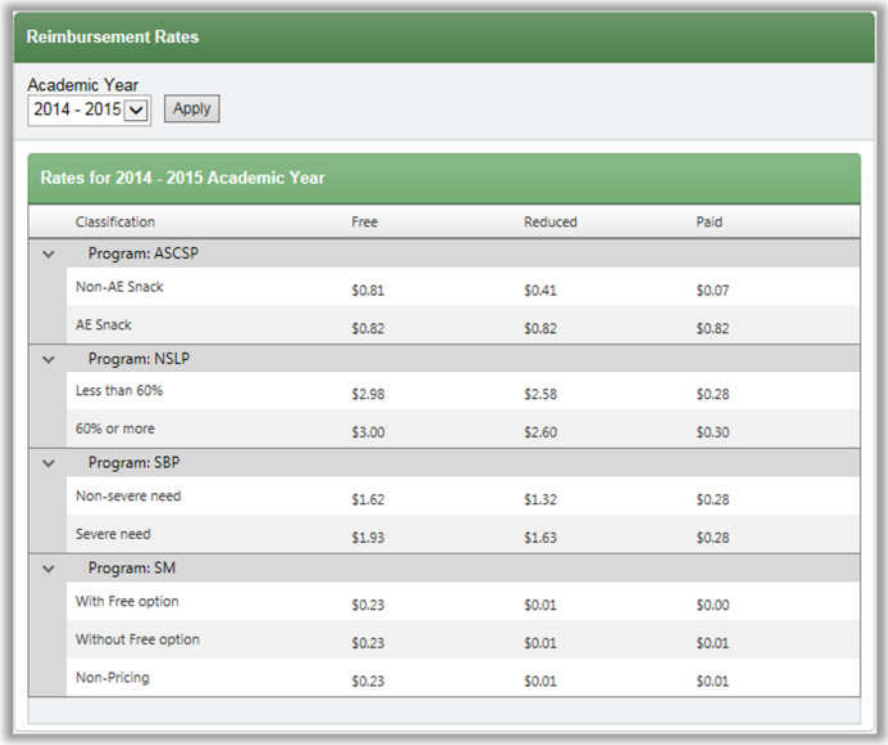
Note
Categories and menu selections to which you have access in SNACS are those appropriate for your assigned role(s). When you access the **Management** menu, you may see a subset of the menu selections listed above.

Reimbursement Rates



Reimbursement Rates displays rates of reimbursement to SFAs for Free, Reduced and Paid meals.

Rates for the current and several past years can be displayed.



By default on the *Reimbursement Rates* page

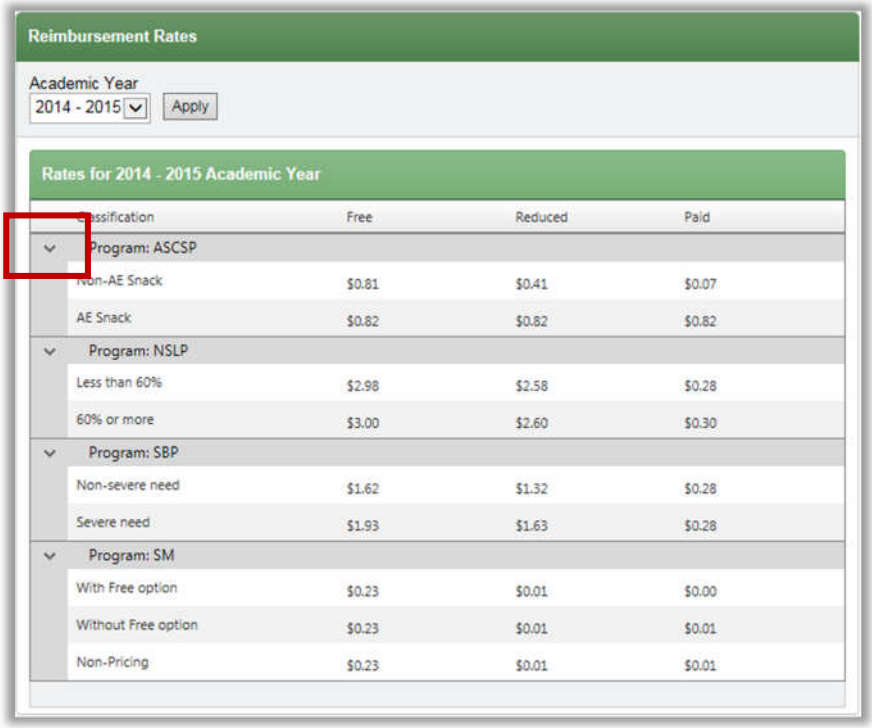
- **Academic Year** is set to the current year.

Page Functions

Field/Button	Description
Apply	Click to retrieve current rates

Table 8.2 Reimbursement Rates Page Functions

Program Groups



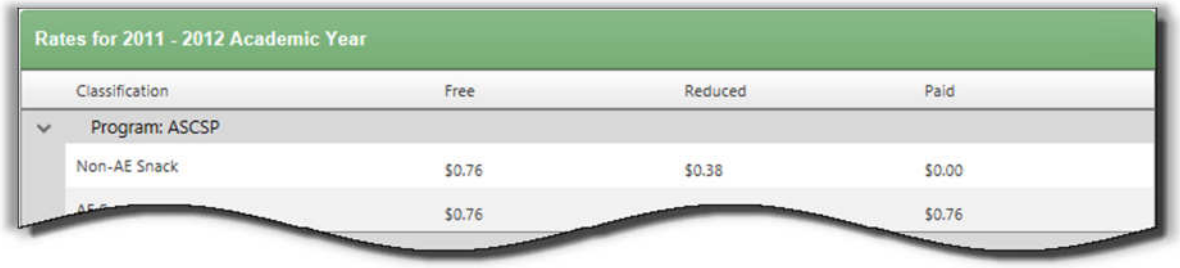
To collapse or hide a group of listings

- Click **Hide** ( ).

To expand or show a group of listings:

- Click **Show** ( ).

Listings: Rates

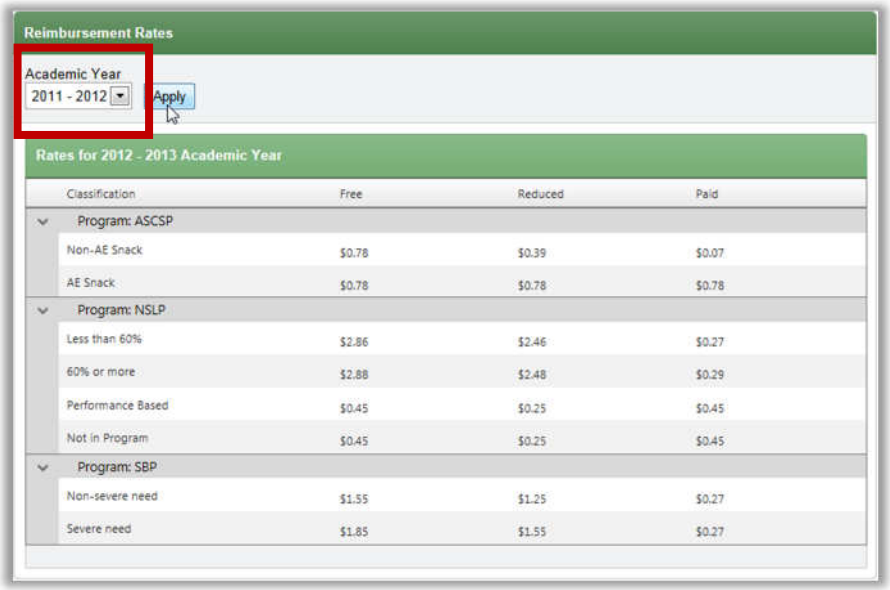


Each listing in **Rates** includes:

Header Name	Data Type	Description
Classification	*View only*	Sub-categories of program services which are eligible for different reimbursement rates.
Free	*View only*	Reimbursement amount for each meal served to a student who is eligible for "Free" meals.
Reduced	*View only*	Reimbursement amount for each meal served to a student who is eligible for "Reduced Price" meals.
Paid	*View only*	Reimbursement amount for each meal served to a student who is not eligible for "Free" or "Reduced Price" meals.

Table 8.3 Reimbursement Rates Listings

Viewing Reimbursement Rates

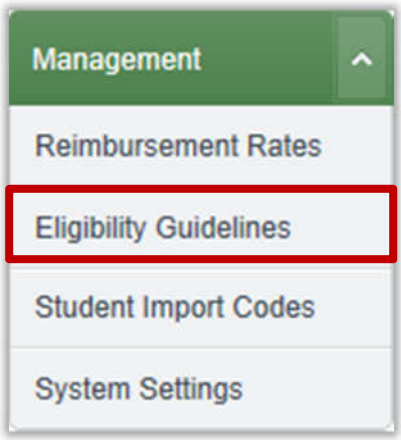


On the *Reimbursement Rates* page

- In **Academic Year**, select a year.
- Click Apply.

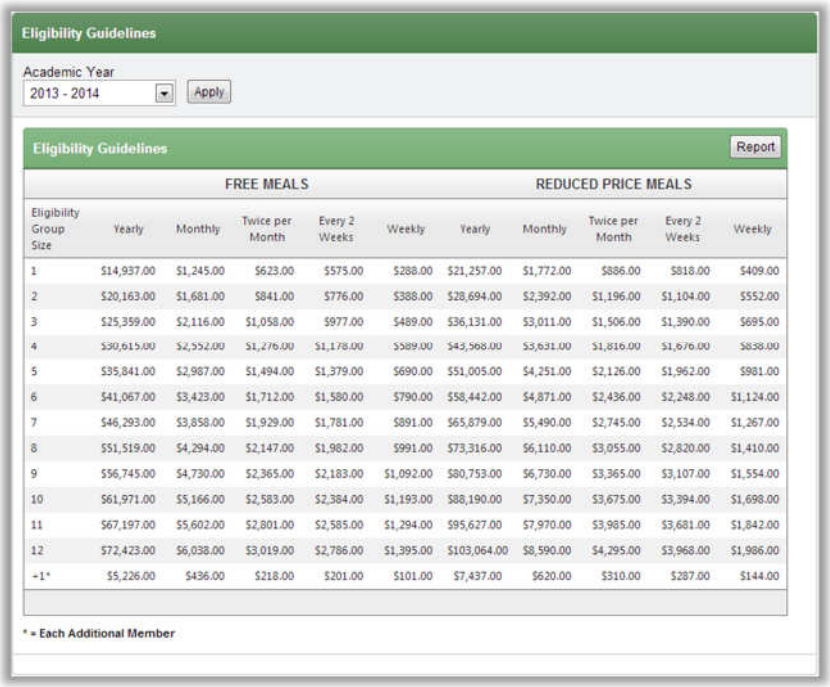
The reimbursement rates in effect for the selected year are displayed in the **Rates** group.

Eligibility Guidelines



Eligibility Guidelines display the yearly guidelines provided by the USDA for household eligibility for Free and Reduced meals.

Income guidelines for the current and several past years can be displayed and printed.



By default on the *Eligibility Guidelines* page

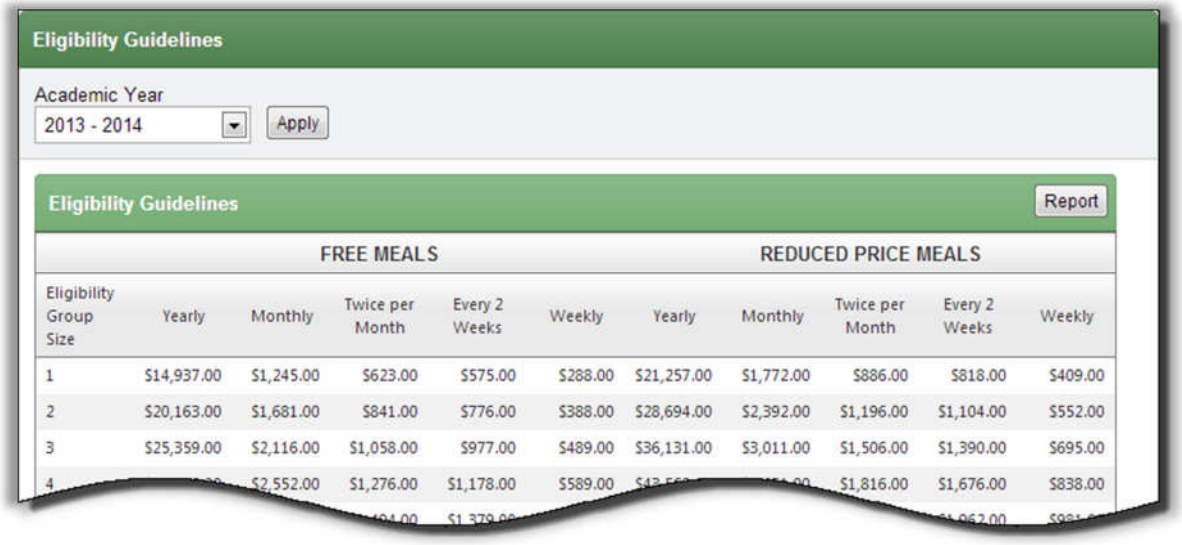
- **Academic Year** is set to the current year.
- All displayed income guidelines reflect the selected (current) year.

Page Functions

Field/Button	Description
Apply	Click to retrieve the guidelines.
Report	Click to generate the displayed guidelines in a report window.

Table 8.4 Eligibility Guidelines Page Functions

Listings: Eligibility Guidelines

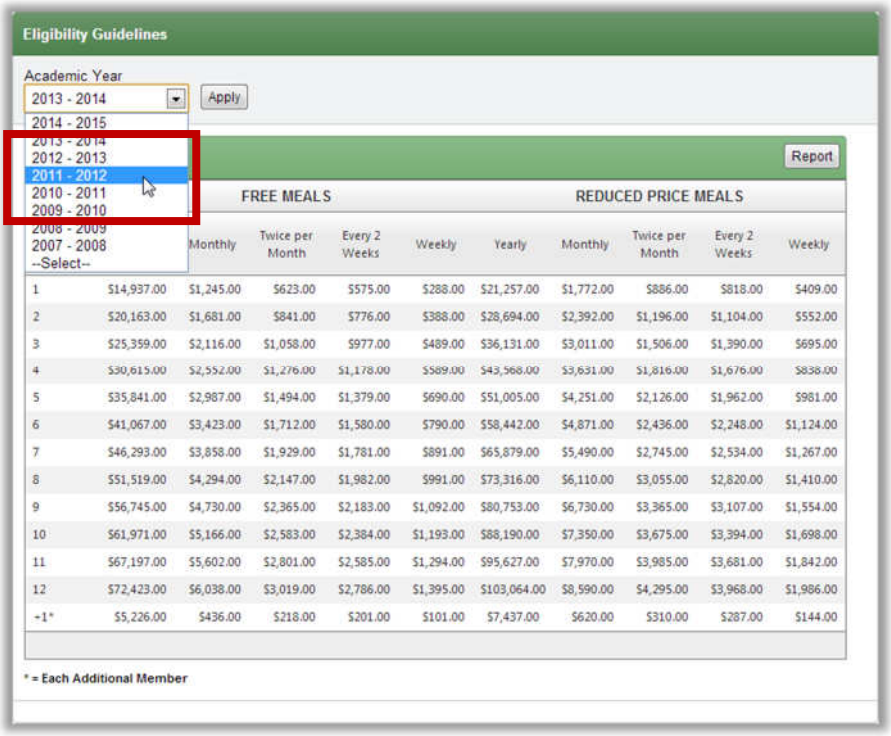


Each listing in **Eligibility Guidelines** includes:

Header Name	Data Type	Description
Eligibility Group Size	*View only*	Number of individuals who reside in the house
(For both meal groups)		
Yearly	*View only*	Yearly limits to qualify for Free or Reduced Priced meals.
Monthly	*View only*	Monthly limits to qualify for Free or Reduced Priced meals.
Twice per Month	*View only*	Monthly limits to qualify for Free or Reduced Priced meals.
Every 2 Weeks	*View only*	Monthly limits to qualify for Free or Reduced Priced meals.
Weekly	*View only*	Monthly limits to qualify for Free or Reduced Priced meals.

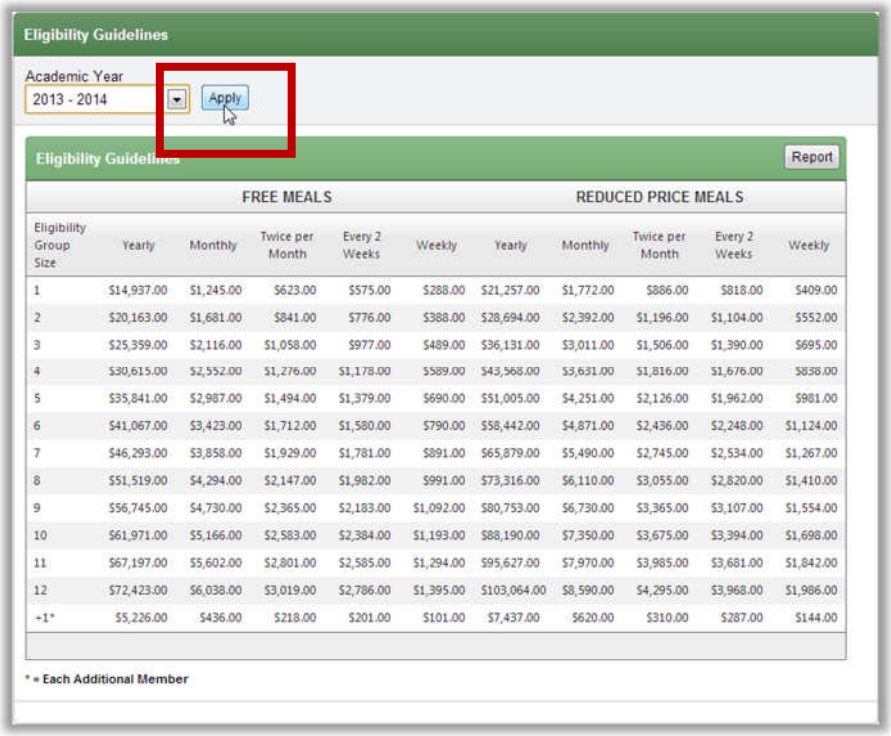
Table 8.5 Eligibility Guidelines Listings

Viewing Eligibility Guidelines



On the *Eligibility Guidelines* page

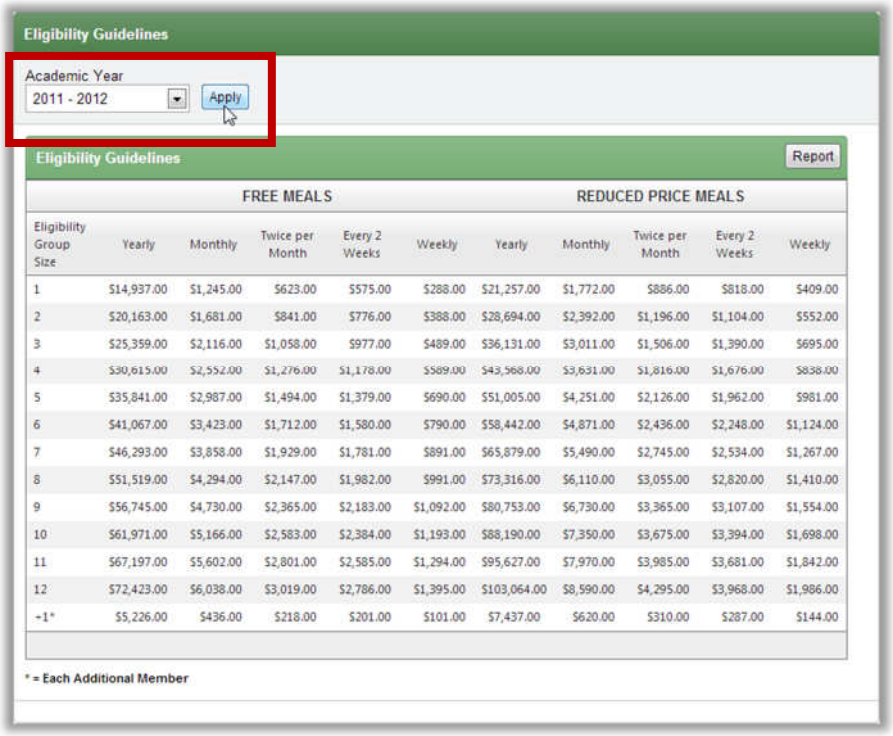
- In **Academic Year**, select a year from the drop-down list.



- Click Apply.

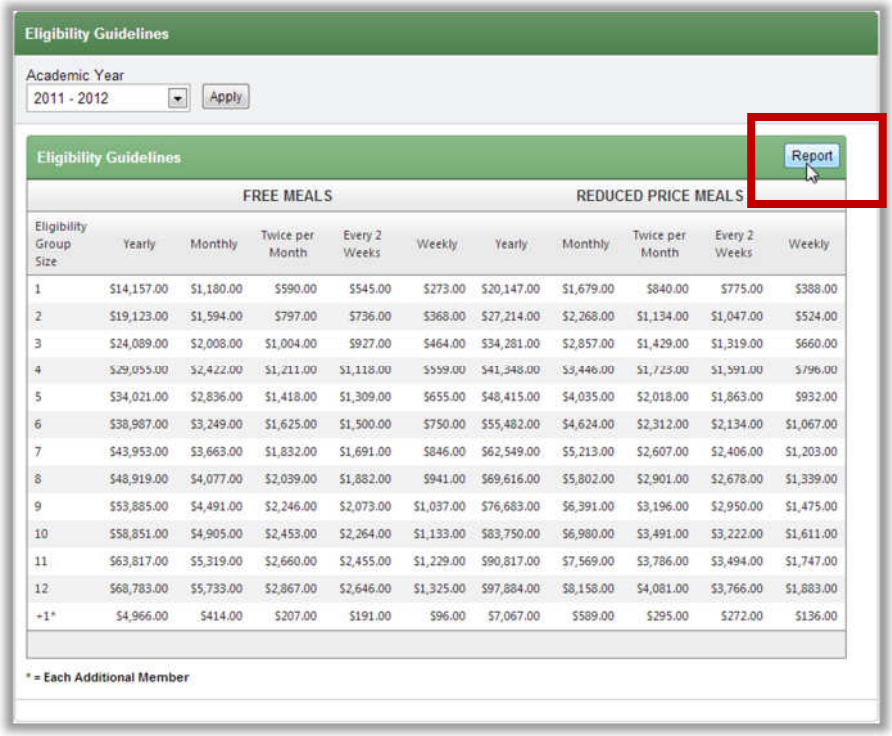
The guidelines in effect for the selected year are displayed in the **Eligibility Guidelines** group.

Printing an Income Eligibility Guidelines Report



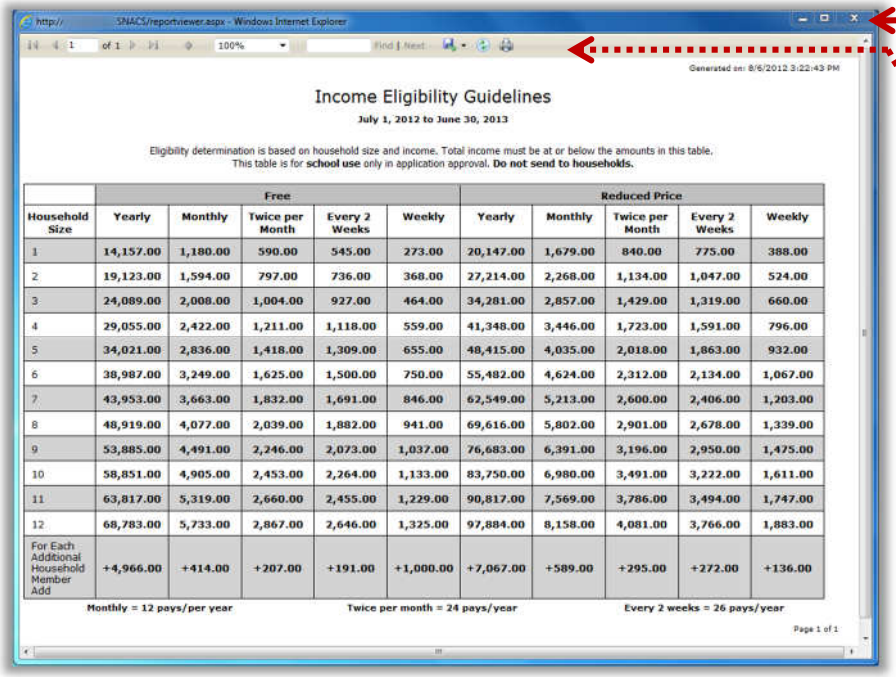
On the *Eligibility Guidelines* page

- In **Academic Year**, select a year from the drop-down list, if needed.
- Click Apply.



In the **Eligibility Guidelines** group

- Click Report.



Generated on: 8/6/2012 3:22:43 PM

Income Eligibility Guidelines

July 1, 2012 to June 30, 2013

Eligibility determination is based on household size and income. Total income must be at or below the amounts in this table.
This table is for **school use** only in application approval. **Do not send to households.**

	Free					Reduced Price				
Household Size	**Yearly**	**Monthly**	**Twice per Month**	**Every 2 Weeks**	**Weekly**	**Yearly**	**Monthly**	**Twice per Month**	**Every 2 Weeks**	**Weekly**
1	14,157.00	1,180.00	590.00	545.00	273.00	20,147.00	1,679.00	840.00	775.00	388.00
2	19,123.00	1,594.00	797.00	736.00	368.00	27,214.00	2,268.00	1,134.00	1,047.00	524.00
3	24,089.00	2,008.00	1,004.00	927.00	464.00	34,281.00	2,857.00	1,429.00	1,319.00	660.00
4	29,055.00	2,422.00	1,211.00	1,118.00	559.00	41,348.00	3,446.00	1,723.00	1,591.00	796.00
5	34,021.00	2,836.00	1,418.00	1,309.00	655.00	48,415.00	4,035.00	2,018.00	1,863.00	932.00
6	38,987.00	3,249.00	1,625.00	1,500.00	750.00	55,482.00	4,624.00	2,312.00	2,134.00	1,067.00
7	43,953.00	3,663.00	1,832.00	1,691.00	846.00	62,549.00	5,213.00	2,600.00	2,406.00	1,203.00
8	48,919.00	4,077.00	2,039.00	1,882.00	941.00	69,616.00	5,802.00	2,901.00	2,678.00	1,339.00
9	53,885.00	4,491.00	2,246.00	2,073.00	1,037.00	76,683.00	6,391.00	3,196.00	2,950.00	1,475.00
10	58,851.00	4,905.00	2,453.00	2,264.00	1,133.00	83,750.00	6,980.00	3,491.00	3,222.00	1,611.00
11	63,817.00	5,319.00	2,660.00	2,455.00	1,229.00	90,817.00	7,569.00	3,786.00	3,494.00	1,747.00
12	68,783.00	5,733.00	2,867.00	2,646.00	1,325.00	97,884.00	8,158.00	4,081.00	3,766.00	1,883.00
For Each Additional Household Member Add	+4,966.00	+414.00	+207.00	+191.00	+1,000.00	+7,067.00	+589.00	+295.00	+272.00	+136.00

Monthly = 12 pays/per year Twice per month = 24 pays/year Every 2 weeks = 26 pays/year

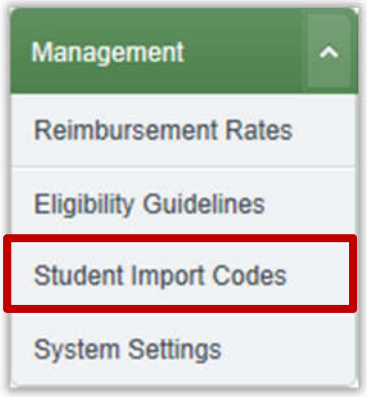
Page 1 of 1

On the *Report Viewer* window toolbar

Click **Print** ( ).

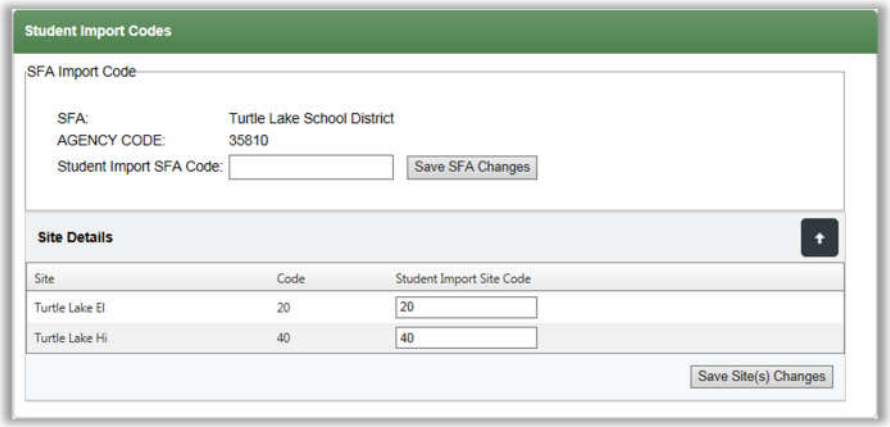
Click **Close** ( ) to close the *Report Viewer* window.

Student Import Codes



Student Import Codes identify each SFA and each feeding Site in the SFA. The codes are used in the header of an import file to identify students served at a Site in the SFA.

Existing SFA code can be viewed or updated. Feeding Site codes can be view or updated and new Site codes can be created.



By default on the *Student Import Codes* page

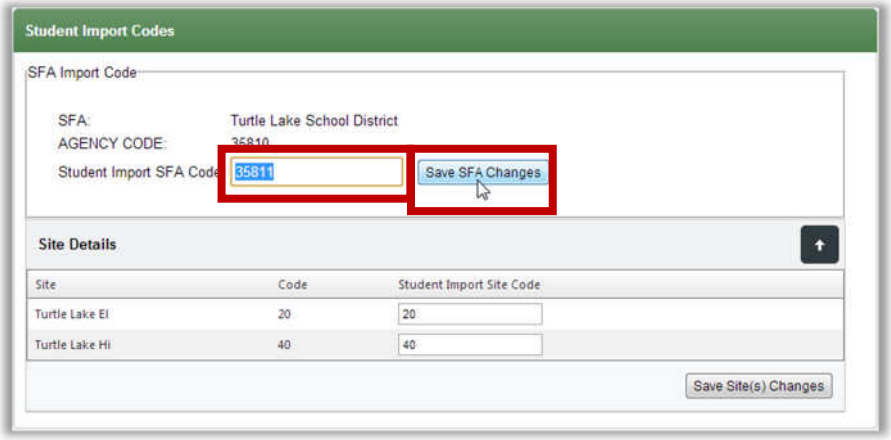
- **SFA** lists the complete School Food Authority name.
- **AGENCY CODE** lists the code assigned to the SFA.
- **Student Import SFA Code** defaults to the **AGENCY CODE**.
- **Site Details** group lists all currently existing feeding-site codes.

Page Functions

Field/Button	Description
Save SFA Changes	Click to save a new SFA import code or changes to the code.
↑ ↓	Click to hide or show the **Site Details** list.
Save Site(s) Changes	Click to save changes to a Site code.

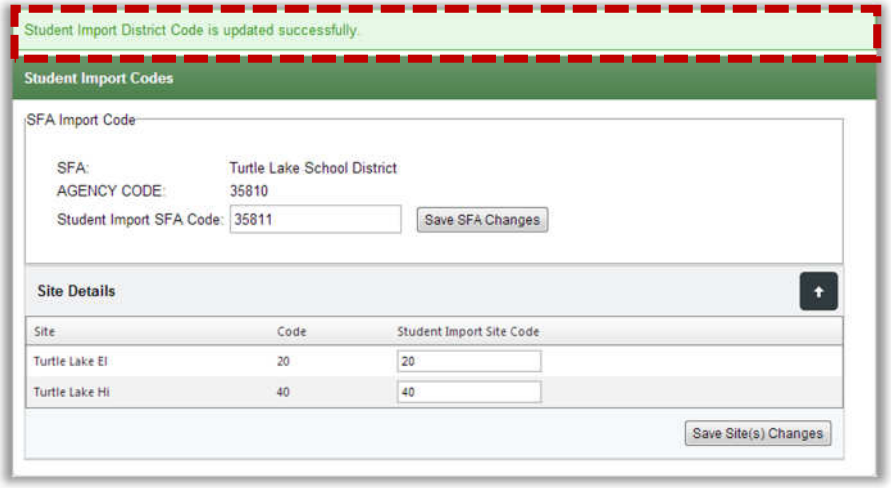
Table 8.6 Student Import Codes Page Functions

Updating a Student Import SFA Code

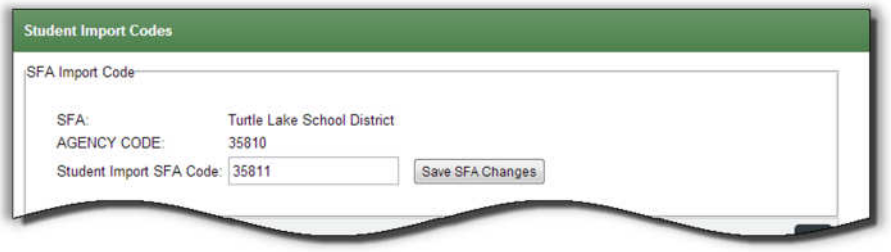


On the *Student Import Codes* page

- In **Student Import SFA Code**, enter a new SFA code.
- Click Save SFA Changes .

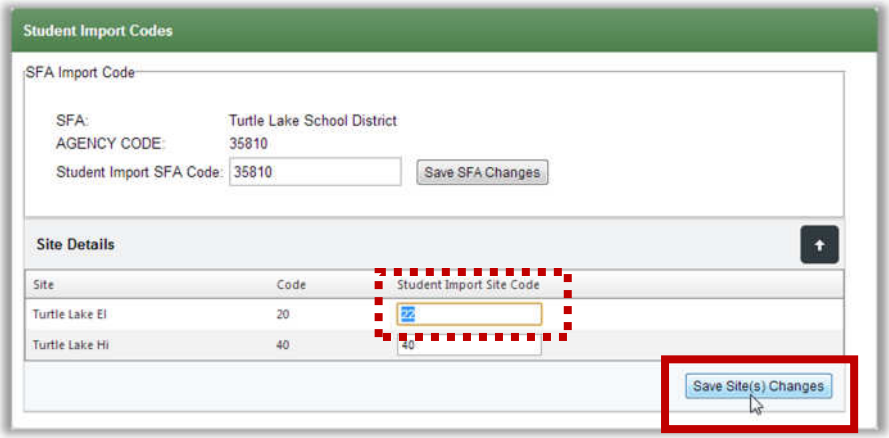


An update success message appears.



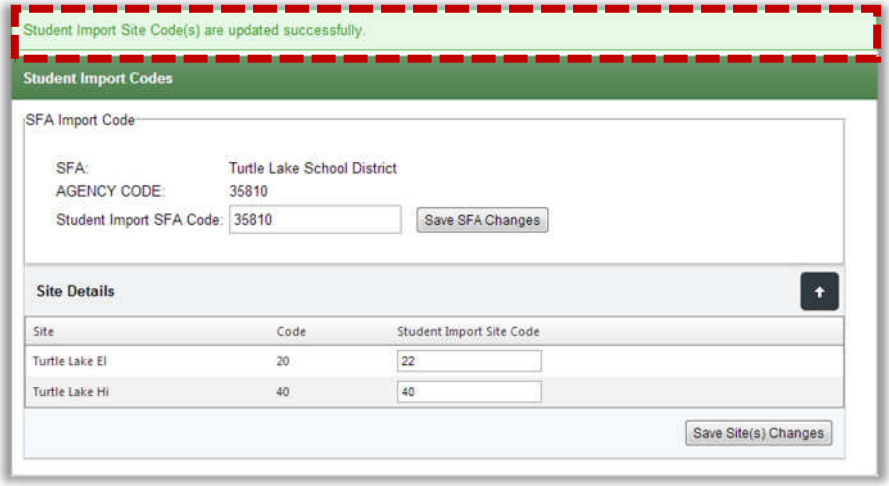
Each time this page is displayed the original Agency Code is shown along with the updated code.

Updating a Student Site Import Code



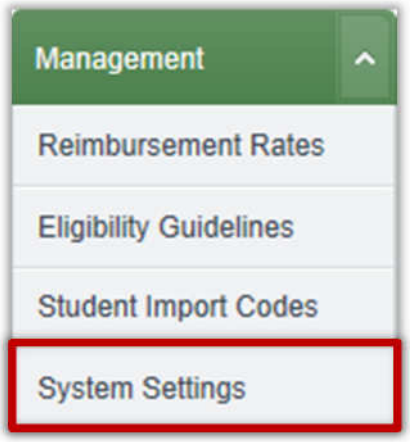
On the *Student Import Codes* page:

- In **Student Import Site Code**, enter a new SFA code.
- Click Save Site(s) Changes .



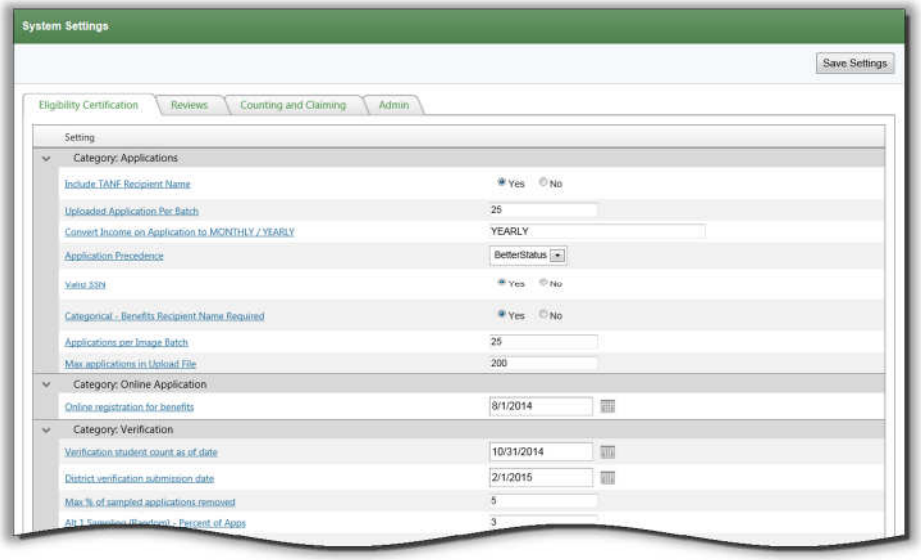
An update success message appears.

System Settings



System Settings offer the ability to set specific values for selected functions, such as the Verification Response Due Days. These values can change over time as the need for the change is required.

See Appendix A: System Settings for a complete list of system settings available at the SFA level.



On the *System Settings* page, by default:

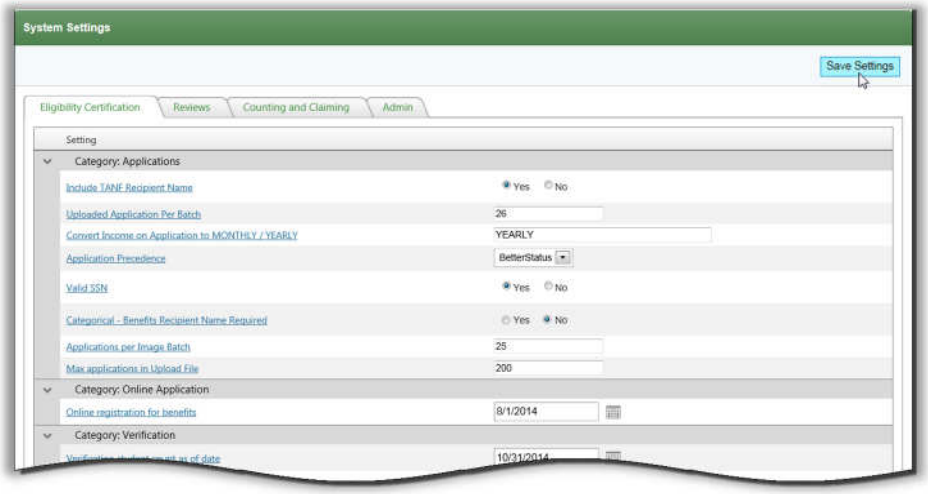
- All Settings available to the SFA are displayed in tabs for each Module.
- Settings are displayed by Category

Page Functions

Button	Description
Save Settings	Click to save changes made to setting values.

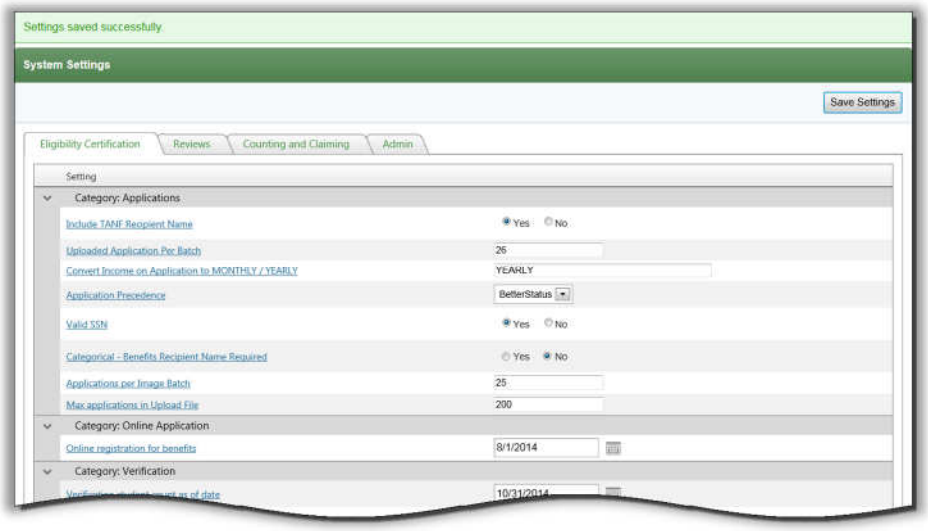
Table 8.7 System Settings Page Functions

Updating a System Setting



On the *System Settings* page:

- In a system setting listing, enter a new setting value.
- Click Save Settings .



A save success message appears.

End of Chapter

Appendix A: Messages

Table A.1 Messages for Admin

Subject / Message / *Description*
Category: Admin
Complete Financial Report Complete the Annual Financial Report *Appears 8/1 and appears 1-time*
Send Public Release Send out the Public Release to Media and Community Agencies *Appears 7/1 and appears 1-time*
Submit Annual USDA Foods Order Submit the annual USDA Foods (Commodity) Order *Appears 7/1 and appears 1-time*

Table A.2 Messages for Counting and Claiming

Subject / Message / *Description*
Category: Claims
Annual Claim Deadline Your Annual Claims must be filed in FNS by 8/31 *Appears on 5/15 if no WI School Day Milk/Elderly Nutrition Program claims in FNS for current Academic Year and SFA is in Program*
Annual Claim Deadline Your Annual Claims must be filed in FNS by 8/31 *Appears on 8/1 and every day until 8/31 if no WI School Day Milk/Elderly Nutrition Program claims in FNS for last Academic Year and SFA is in Program*
FNS Claim Data Overdue Your <<Month Year>> claim has not been filed. Claims must be entered in the FNS system within 60 days after the end of the claiming period. *Appears on the 51st day after the last serving day of the month and repeats until the 60th day after the last serving day of the month if the claim has not been submitted in the FNS system and the SFA or Site is in Program*
High Breakfast Count Breakfast count for <<Month Year>> is equal to or higher than Lunch count. *Appears when the number of breakfast meals is equal to or higher than the lunch meals*

Table A.2 Messages for Counting and Claiming, continued

Subject / Message / *Description*
Category: Claims
No Claim Data No Claim Data Exists for <<Month Year>>. *Appears 51 days from last serving day of the month if the claim is not entered in FNS; appears daily until 60 days after last serving day of the month or until the day after claim is entered in FNS, whichever occurs first*

Table A.3 Messages for Contract

Subject / Message / *Description*
Category: Contract
Renew Contract Renew annual contract using DPI's Online Contract System *Appears 5/1 and appears 1-time*
Submit Food Service Contract Submit Food Service Management company contract to DPI *Appears 5/1 and appears 1-time*
Submit Joint Agreement Submit Joint Agreement to DPI *Appears 5/1 and appears 1-time*
Submit RFP Submit RFP to Food Service Management company *Appears 5/1 and appears 1-time*
Submit Vendor Contract Submit Vendor contract to DPI *Appears 5/1 and appears 1-time*

Table A.4 Messages for Reports

Subject / Message / *Description*
Category: Reports
Child Nutrition Report Please review your Child Nutrition Report on Online Services. *Appears 11/1 and appears 1-time*
Civil Rights Compliance Complete the Civil Rights Compliance Self Evaluation form. *Appears 10/15 and appears 1-time*
On-Site Monitoring form Complete the On-site Monitoring form *Appears 1/1 and appears 1-time*
On-site Monitoring form for Afterschool Snacks Complete the On-site Monitoring form for Afterschool Snack Program *Appears 1/1 and appears 1-time*
On-site Monitoring form for Afterschool Snacks Complete the On-site Monitoring form for Afterschool Snack Program during the first 4 weeks of operation *Appears 9/1 and appears 1-time*
Submit FNS-10 Submit the FNS-10 report *Appears 10/31 and appears 1-time*

➢ *End of Appendix* ➢

Appendix B:
System Settings

Table B.1 System Settings for Admin

System Setting / Description
Category: Management
None

Table B.2 System Settings for Counting and Claiming

System Setting / Description
Category: Claims
Attendance Factor Controls whether Attendance Factors are entered Monthly for each Site or Monthly for the entire SFA.

End of Manual