

School Nutrition Programs



Manual for Organizations operating a USDA Child Nutrition Program

**(National school Lunch Program, School Breakfast
Program, Afterschool Care Snack Program and
Special Milk Program)**

**Department of Education
Bureau of Nutrition and Health Services
June 2014**

State of
Department of Education
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Introduction

Welcome to the Iowa Department of Education (IADE) user manual for the School Nutrition Programs module. The system is a web-based software solution that provides administrators, state users, and Organizations with efficient and immediate access to applications, claims, and related nutrition program functions.

Web Site Benefits and Features

The system is a user-friendly web application that allows authorized state agency personnel and Organizations to submit and approve application, claims, and miscellaneous forms via the Internet. Key system features include:

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

User Manual

This user manual is intended for use by Organization users that participate in the School Nutrition Programs. It is designed to provide a general understanding of how to use the system in an effective and efficient manner. This manual will provide:

- A general explanation of each feature available.

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

Getting Started

Before you can begin using IowaCNP you must be assigned a user ID and password. Contact Ellen Miller at Ellen.Miller@.gov if you need assistance. Once this setup is complete, you may use the Internet and your assigned user ID and password to access and log onto the web site.

Accessing the Web Site

You can access the system from any computer connected to the Internet by opening your Internet browser and entering the URL (shown below) in the address line:

<https://cnp.ed.gov/cnp/>



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



Figure 1: System Home Page

About the System Home Page

The System Home Page consists of three major sections:

- Bulletin Board.
- Log on.
- Links.

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

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

The links section provides access to websites and additional information:

Logging On

To log on

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

Note: If you do not have a User ID and Password, contact the Ellen Miller at Ellen.Miller@gov.



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

To change your password

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

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

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

Screen Options

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



Figure 2: Screen Options - example

The following table describes each of the possible screen options:

Item	Description
VIEW	Presents the screen information in 'view-only' mode. In this mode, the user cannot modify any data.
MODIFY	Presents the screen in 'modify' mode. In this mode, the user can modify field data and save the data after pressing the save button at the bottom of the screen.
DELETE	Deletes the current record displayed on the screen. The user will be presented with a confirmation screen to validate that they intend to delete the record.

School Nutrition Programs Home Page

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

To access the School Nutrition Programs home page

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

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

3. The School Nutrition Programs home page displays.

Note: State administrators maintain the message boards for all modules. If you would like a message posted on the School Nutrition Programs home page, please contact Ellen Miller at Ellen.Miller@gov. Please note that messages are visible to all users.



Figure 3: School Nutrition Programs Home Page

School Nutrition Programs menu options

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

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

Menu Item	Menu Features
Applications	Access to overall application-related items including: <ul style="list-style-type: none">▪ Application Packet (inc. Organization, SNP, and FFVP applications).▪ Verification Reports▪ Food Safety Inspection Reports▪ Form Download
Claims	Access to claim entry screens (e.g., SNP and FFVP) and Organization-specific payment history.
Compliance	Forms necessary for the Administrative Review
Security	Access to an individual user's security-related items including: <ul style="list-style-type: none">▪ User Manager.
Search	Access to the Organization Search screen (State users and Organization users with access to more than one Organization.).

Error Processing

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

Input Edits

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

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

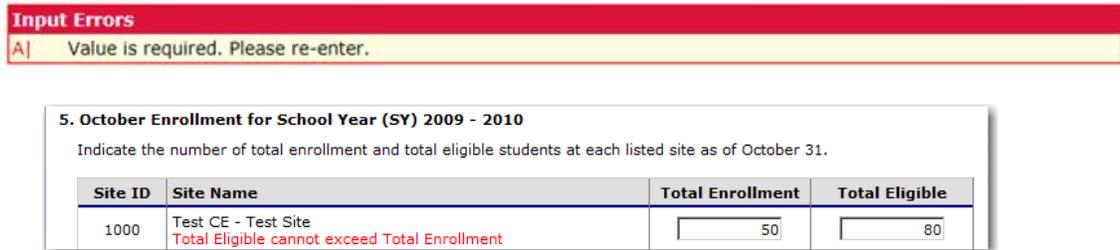


Figure 4: Examples of an Input Error (Partial Screen)

Business Rule Edits

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

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

Code	Error Description
3067	Pricing Information - NSLP - If Pricing Information is Pricing or Pricing without Free Option, then Paid Price must be greater than zero.

Version: Original

Meal Type	Pricing Information	Paid Price	Reduced Price	Adult Price
National School Lunch Program (NSLP)	Pricing	0.00	0.00	3.27
School Breakfast Program (SBP)	Pricing	1.55	0.30	3.27

Figure 5: Example of a Business Rule Error (Partial Screen)

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

Code	Warning Description
3114	NSLP - Meal Service Begin Time cannot be prior to 10:00 AM unless pre-approved by State.

A2. Meal Service Times Begin Time: 9 AM :45 End Time: 1 PM :00

Figure 6: Example of a Warning Error

Note: If you think an error message is incorrect or unclear, please contact the Patti Harding at patti.harding@gov.

Selecting a School Year

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

To select a school year

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

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

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



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

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

School Year	Date Range	Application Packet
 2014 - 2015	07/01/2014 - 06/30/2015	Application Packet on File
2013 - 2014	07/01/2013 - 06/30/2014	Application Packet on File
2012 - 2013	07/01/2012 - 06/30/2013	Application Packet on File

Figure 7: Year Select screen

Organization Search

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

If you are associated with more than one organization, you must search for and select a Organization using the Organization Search function before beginning any task. When the Organization Search screen displays, you can search for the Organization using all or part of the Organization's ID, Name, or any other combination of parameters provided on this screen.

To search for a Organization

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



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

Search for Organizations

Agreement Number:	<input type="text"/>	Packet Status:	<input type="text"/>
Organization Name:	<input type="text"/>	Field Service Rep:	<input type="text"/>
Headquarter Number:	<input type="text"/>	Packet Assigned To:	<input type="text"/>
Vendor Number:	<input type="text"/>	Program Region:	<input type="text"/>
County:	<input type="text"/>	Program Status:	<input type="text"/>
County Code:	<input type="text"/>		
Organization Status:	<input type="text" value="Active"/>		

Organizations					Found: 3
Agreement Number	Organization Name	Application Packet Status	Submitted for Approval	Approval Date	Packet Assigned To
13570000	Spring Valley CSD	Not Submitted			
22350000	Silver Lake CSD	Not Started			
79350000	Elm Creek CSD	Not Submitted			

Figure 8: Organization Search screen

Note: Users will only see Organizations associated with their user account.

The search parameters follow a specific set of rules. These are described in the following table.

If the type of search is identified as “includes”, the system will search for any Organization that includes the parameter in any portion of the selected field. For example, if the user entered “386” in the Agreement # parameter, the system will retrieve Organizations with Agreement #s of “00386” and “01386”.

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

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

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

SNP Sponsor Search

Search for Sponsors

Agreement #: Packet Status:

Sponsor Name: Field Service Rep:

Vendor Number: Packet Assigned To:

County: Region:

Program Status:

Sponsor Status:

Search all available Programs

Sponsors **Found: 7**

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

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

3

Applications

Now that you know how to access and log on to the system, the remainder of the manual will explore the functions of the School Nutrition Programs module. Let's first look at the Applications component of the system, where users manage yearly enrollment of Organizations and sites and complete the appropriate forms required by the State.

About the School Year Enrollment Process

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

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

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



Figure 10: Enrolling in a New Program Year

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

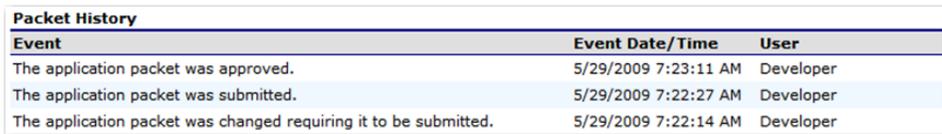
Submitting an Application Packet

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

In order to be able to submit an Application Packet, the packet must contain:

- A completed Organization Application with no errors.
- At least one completed SNP Site Application with no errors.
- All items in the Checklist are identified as submitted to the State.
- If the Organization had identified that they would be using a Food Service Management Company on their Organization Application, the packet must contain at least one Food Service Management Company contract with a status of “Submitted”.

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



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

Figure 11: Packet History (sub-section of the Application Packet screen)

Applications Menu

The Applications menu is the starting point for all tasks related to the annual School Nutrition Programs enrollment process. Menu items are based on security levels.

To access the Applications Menu

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

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



Figure 12: Applications Menu screen (SFA view)

Application Packet

In order to participate in the School Nutrition Programs (SNP), Organizations must submit an Application Packet to the State for review and approval. At the beginning of each program year, Organization data is rolled over and must be verified by Organizations prior to submitting any claims.

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

Application Packet item has been completed correctly and contains no errors, a green check displays next to the Application Packet item.

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

Note: Once an Application Packet has been approved, when a Organization revises any item within the Application Packet, the Application Packet must be re-submitted for approval.

To access the Application Packet

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

Action	Form Name	Latest Version	Status
View Modify	➔ Organization Application	Original	Error
View Modify	✔ Community Eligibility Provision (CEP) Schedule		Submitted
Details	FSMC Contract List		No Contracts
Details	➔ Meal Pattern Compliance Dashboard		Pending Validation
Details	➔ Checklist Summary (2)		

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

Figure 13: Application Packet screen

Organization Application

The Organization Application screen provides access to the Organization’s annual application for the School Nutrition Programs for both new and renewing Organizations. The Organization is required to complete a new Organization application annually; some data will roll over from the previous year and pre-fills a new year’s application.

To modify a Organization application

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. Select the appropriate year.

3. Select **Modify** next to the **Organization Application** packet item. The Organization Application for the designated school year is displayed.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Organization Application screen.

-OR-

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



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

To revise a Organization application

Note: Only state-approved applications can be revised. Once a Organization revises any item within the Application Packet, the Application Packet must be re-submitted and the state review and approval process starts again.

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. Select the appropriate year.
3. Select **Revise** next to the **Organization Application** packet item. The Organization Application for the designated school year is displayed.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Organization Application screen you just modified.

-OR-

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



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

To view a Organization application (Revision)

7. On the blue menu bar, select **Applications**.
8. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
9. Select the revision link under the **Latest Version** column. The Sponsor Application History for the designated school year is displayed.
10. Select the application version you would like to view.



TIP: The View option appears in two situations: 1) If the user only has view-access security rights or 2) If the user has modify-access security rights BUT the Application Packet has been submitted to the State and is under State review and therefore can no longer be modified.

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

Site Applications – School Nutrition Program

Organizations must complete a Site Application for each of their sites. The Site Application screen provides access to the Site's annual application for the School Nutrition Programs for both new and renewing sites. Sites must complete a new application annually; however, some data rolls over from the previous year and pre-fills a new year's application.

To access the Organization's site list

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. Select the appropriate year.
3. Under Site Applications, select **School Nutrition Program**. The Application Packet - SNP Site List screen displays.

School Nutrition Programs

Iowa **C N P**

Applications | Claims | Compliance | Reports | Security | Search | Year | Help | Log Out

Applications > Application Packet > Packet Site List - SNP > School Year: 2014 - 2015

2014 - 2015 Application Packet - SNP Site List

12340000 Status: Active
 Anytown USA
 DBA:
 12 Scott St
 Garden Grove, IA 51503-0782
 Type of Agency: Educational Institution
 Type of SNP Organization: Public

Action	Site ID / Site Name	NSLP SBP ASCP SMP FFVP					Version/ Status	% Enroll Free/Redc Oct 2013
		Totals	16	16	6	0		
View Modify ✓	0109 Thomas Jefferson High School		X	X			Original / Not Submitted	70.0000
View Modify ✓	0118 Abraham Lincoln High School		X	X			Original / Not Submitted	50.3552
View Modify ✓	0212 William Jefferson Clinton High School		X	X	X		Original / Not Submitted	58.9130

Add Site Application ←

Total Sites Enrolled: 3

Figure 14: Application Packet – SNP Site List screen

To add a new site (for Organizations)

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. Select the appropriate year.
3. Under Site Applications, select **School Nutrition Program**. The Application Packet - SNP Site List screen displays.
4. At the bottom of the site list, select **Add Site Application**. The SNP Available Site(s) screen displays.

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

5. If the site you would like to add an application for is listed, contact Ellen Miller at Ellen.Miller@.gov.

To view a Site Application

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

To modify a Site Application

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. Select appropriate year.
3. Under Site Applications, select **School Nutrition Program**. The Application Packet - SNP Site List screen displays.
4. Select Modify next to the site whose application you would like to view. The site's Site Application is displayed.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Site Application screen.
-OR-
Select **Finish** to return to the SNP Site List screen.
8. Repeat **Steps** 4 through 7 for each site that will participate in the program.

To delete a Site Application

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. Select appropriate year.
3. Under Site Applications, select **School Nutrition Program**. The Application Packet -

SNP Site List screen displays.

4. Select **Modify** next to the site whose application you would like to delete. The site's Site Application is displayed.
5. Select **DELETE** on the Edit menu in the top-right corner.
6. The system transfers you to the bottom of the screen and a warning message is displayed.
7. Select the **Delete** button at the bottom of the page. A confirmation message displays.



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

To revise a Site Application

Note: Only state-approved applications can be revised. Once a Organization revises any item within the Application Packet, the Application Packet must be re-submitted and the state review and approval process starts again.

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



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

Food Service Management Company (FSMC) Fact Sheet

If the Organization's School Nutrition Program is managed by a Food Service Management Company (FSMC), then information regarding the FSMC contract is **required** as a part of the Application Packet. The FSMC Application Packet item is initiated when the Organization has specified that they will be using a FSMC on their Organization application. If the Organization has not specified that they will be using a FSMC for the respective year, the FSMC Fact Sheet will not appear on the Application Packet screen. SPECIAL NOTE: A State Consultant will enter the prior year's contract on behalf of the SAF and will contact the SFA when completed.

Community Eligibility Provision Schedule

If the Organization is interested in participating in the Community Eligibility Provision offered by the USDA, the Community Eligibility Provision Schedule must be completed. This item is automatically added to the Application Packet screen when the Organization answers "Yes" to the "Will any of your sites be participating in the Community Eligibility Provision (CEP) for the National School Lunch Program?" question under the Eligibility Information section of the Organization Application.

To access the Community Eligibility Provision Schedule

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select ADD next to **Community Eligibility Provision (CEP) Schedule**. The Community Eligibility Provision (CEP) Schedule screen displays.

Note: The default display is to show the Grouping detail for all groups associated with the Organization (i.e., Show Detail column checked). To view only groups with sites, uncheck the "Show Detail" checkbox where Number of Sites is "0".

Summary									
Total Sites: 2									
Group Name	Show Detail	Number of Sites	First Year	Year Used	Eligible Students	Enrolled Students	Identified Student %	Reimburse % Free	Reimburse % Paid
Unassigned	<input checked="" type="checkbox"/>	2			77	180			
Individual	<input checked="" type="checkbox"/>	0			0	0			
Group 1	<input checked="" type="checkbox"/>	0			0	0	0.00	0.00	100.00
Group 2	<input checked="" type="checkbox"/>	0			0	0	0.00	0.00	100.00
Group 3	<input checked="" type="checkbox"/>	0			0	0	0.00	0.00	100.00
Group 4	<input checked="" type="checkbox"/>	0			0	0	0.00	0.00	100.00
Group 5	<input checked="" type="checkbox"/>	0			0	0	0.00	0.00	100.00

Instructions									
<p>The Community Eligibility Option (CEO) for the National School Lunch Program (NSLP) provides an alternative to household applications for free and reduced price meals. Sites which have a 40% or greater percentage of DC are eligible for this option. Sites whose percentage is between 30.00% - 39.99% are potentially eligible.</p> <p>For each site, identify whether the site will qualify based on its individual numbers ("Individual") or as a group ("Group").</p>									
Grouping									
Site ID	Site Name	Group	First Year	Year Used	Eligible Students	Enrolled Students	Identified Student %	Reimburse % Free	Reimburse % Paid
0001	Sample Site 1	Unassigned	2013	2013	45	100	45.00	72.00	28.00
0002	Sample Site 2	Unassigned	2013	2013	32	80	40.00	64.00	36.00

Figure 15: Community Eligibility Provision (CEP) Schedule screen

To define a CEP Schedule

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Add** next to **Community Eligibility Provision Schedule**. The Community Eligibility provision (CEP) Schedule screen displays.

Note: The CEP Schedule screen lists all sites that had identified on their Site Application that they will be participating in the Community Eligibility Provision (CEP) program.

The Students data displayed on this screen is retrieved from the Community Eligibility Provision screen (i.e., April data) for the optimal program year (i.e., the April data that yields the highest Identified Students percentage).

- **Participation Year 1:** The student data displayed is the site's/group's prior year April data
- **Participation Year 2:** The student data displayed is either: a) the site's/group's Year Prior to First Year (YPFY) or b) Year 1 April data – whichever yields the higher Identified Student percentage.
- **Participation Year 3:** The student data displayed is either: a) the site's/group's Year Prior to First Year (YPFY) or b) Year 2 April data – whichever yields the higher Identified Student percentage.

- **Participation Year 4:** The student data displayed is either: a) the site's/group's Year Prior to First Year (YPFY) or b) Year 3 April data – whichever yields the higher Identified Student percentage.

4. For each site, under the Group column, select whether the site will qualify based on its own site data by selecting “Individual” or if the site will qualify by being grouped with other sites by selecting the group number.

Note: If the Organization is qualifying as district-wide, all sites must be assigned to “Group 1”.

5. Once all sites have been either identified as “Individual” or assigned to a group, select **Save**.

Note: CNP will issue an error if any group does not meet the minimum 40.00% Identified Student percentage.

To add a site to an existing Community Eligibility Provision Schedule

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Modify** next to **Community Eligibility Provision Schedule**. The Community Eligibility provision (CEP) Schedule screen displays.
4. The new site will be identified as “Unassigned” under the Group column. Select the group to which the site should be associated or select “Individual” if the site qualifies based on its own student data.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Community Eligibility Provision (CEP) Schedule screen.
-OR-
Select **Finish** to return to the Application Packet screen.



WARNING: All sites identified on their site application as participating in CEP must be assigned to a group or identified as “Individual”.

To delete a Community Eligibility Provision Schedule

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Modify** next to **Community Eligibility Provision Schedule**. The Community Eligibility Provision (CEP) Schedule screen displays.
4. Select **DELETE** on the Edit menu in the top-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.



WARNING: Organizations are not provided the ability to delete a Community Eligibility Provision Schedule. This is controlled by authorized IADE staff via the CNP Security module.

To export the Community Eligibility Schedule

7. On the blue menu bar, select **Applications**. The Applications menu screen displays.
8. On the menu, select **Application Packet**. The Application Packet screen displays.
9. Select **View** next to **Community Eligibility Provision Schedule**. The Community Eligibility Provision (CEP) Schedule screen displays.
10. Select the **Export** button. A spreadsheet opens in Microsoft Excel that lists information displayed in the Grouping section of the Community Eligibility Provision (CEP) Schedule screen.

Meal Pattern Compliance Dashboard

Organizations must demonstrate compliance with the USDA's updated meal pattern requirements in order to qualify for and receive the additional 6 cent reimbursement. The submission and review of the documentation required is performed as part of the Application Packet process via the Meal Pattern Compliance Dashboard.

The Organization must add and upload each menu before completing the Annual Attestation screen. If an Application Packet is returned as a result of incomplete or incorrect menus, the Organization must re-upload the corrected menus and resubmit the Annual Attestation.

To access the Meal Pattern Compliance Dashboard

11. On the blue menu bar, select **Applications**. The Applications menu screen displays.
12. On the menu, select **Application Packet**. The Application Packet screen displays.
13. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.

School Nutrition Programs

Applications | Claims | Compliance | Reports | Security | Search | Year | Help | Log Out

Applications > Application Packet > Meal Pattern Dashboard > School Year: 2014 - 2015

Meal Pattern Compliance Dashboard For School Year: 2014 - 2015

12340000 Status: Active
Maple Grove Community School District
DBA:
12 Scott St
Maple Grove, IA 51503-0782
Type of Agency: Educational Institution
Type of SNP Organization: Public

Submitted Date:
Original Submitted Date:
Approved Date:
Validated Date:

Instructions

All Menus must be uploaded prior to uploading the Annual Attestation. To upload a menu, click on the Add Menu link in the Menus section of this screen.

Annual Attestation (2014 - 2015)

Action	Document Preparer Contact	Lunch Served	Breakfast Served	Org Attestation	Date Last Updated	Status
View Modify	Ms. Patti Mills patti.mills@anytownusa.org (515) 565-5656	Yes	Yes	View	5/28/2014	Not Submitted

Months Certified (2014 - 2015)

Action	Jul 2014	Aug 2014	Sep 2014	Oct 2014	Nov 2014	Dec 2014	Jan 2015	Feb 2015	Mar 2015	Apr 2015	May 2015	Jun 2015
		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	

Menus Menu Count: 0

Action	Meal Type	Age Grade Group	Menu Nbr	Menu Name	Menu Worksheet	Menu	Nutritional Analysis	Date Last Updated	Status	Site Count
No data to display.										

Add Menu

Menu Certification Status

Status Count		Status Percentage
■ Incomplete	0	
■ Pending	0	
■ Approved	0	
■ Error	0	

Meal Pattern Notes Note Count: 0

Action	Date	Created By	Note Summary
No data to display.			

Add Note

[< Back](#)

Figure 16: Meal Pattern Compliance Dashboard screen

Special Note: SFAs that were certified in FY13 or FY14 will not be required to add menus in the **Menu Section**.

To add an Annual Attestation



TIP: Annual Attestations cannot be added until all Menus have been uploaded.

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.
4. Select the **Modify** link in the Annual Attestation section of the Meal Pattern Compliance Dashboard. The Annual Attestation screen displays.
5. Enter the contact information.
6. In the Document section, select the **Add** link to upload the respective file document. The File Upload screen displays providing the ability to Browse and Upload a document.

The screenshot shows a 'File Upload' dialog box. It has a title bar with the text 'File Upload'. Below the title bar, there are two numbered fields: '1. File:' followed by a text input field and a 'Browse...' button; and '2. Comment:' followed by a large text area with a vertical scrollbar on the right. At the bottom of the dialog, there are two buttons: 'Upload' (highlighted in red) and 'Cancel'.

7. Select **Upload** to upload the document and return to the Attestation screen.
 8. Enter comments, if necessary.
 9. Select **Save**. A confirmation screen displays.
 10. Select < **Edit** to return to the Menu screen.
- OR-
- Select **Finish** to return to the Meal Pattern Compliance Dashboard screen.

To modify an Annual Attestation

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

3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.
4. Select the **Modify** link next to the Annual Attestation to modify. The Annual Attestation screen displays.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.

To view an Annual Attestation

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.
4. Select the **View** link next to the Annual Attestation to view. The Annual Attestation screen displays. Click on **View** in the **Documents section** to view the attached Attestation Form.

To view an uploaded supporting document

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.
4. Select the **View** link associated with the supporting document (e.g., CE Attestation). The document opens in a secondary window/tab.

Checklist

A checklist is automatically generated based upon answers to specific questions from the Organization and site applications. The checklist identifies supplemental documents that need to be submitted to the state. The Checklist feature allows Organizations to keep track of documents and their dates of submission. State users use this feature to identify when documents have been received and to denote the status of the documents.

To access a Checklist

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

Organization	Total Items	Submitted Items	Approved Items
Anytown Community School District	2	1	0

School Nutrition Programs Sites	Total Items	Submitted Items	Approved Items
Anytown Elementary School	0	0	0

Figure 17: Checklist Summary screen

To view a Checklist

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

Note: Only Organizations and sites who have completed their applications and who have additional required documents will have a checklist.

To update a Checklist

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Application Packet**. Select appropriate year. The Application Packet screen displays.
3. Select Details for the **Checklist Summary**. The Checklist Summary screen displays.
4. Select the Organization or Site whose checklist you wish to update. The Checklist screen displays.
5. Identify whether the document has been submitted and the submission date. The Date Submitted to IDE field automatically defaults to the system date. This can be changed by the user. A checklist is not considered complete until all checklist items are identified as having been submitted to IDE.
6. Select Save. The Checklist Summary screen displays.

Verification Collection Report

SFAs will be notified each year when this section is available for submission. Organizations use the Verification Report function to complete and submit the mandatory annual verification report to the State. The verification report contains information about sites collecting applications, site enrollment, eligibility information, and verification results.

To access a Verification Collection Report

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Verification Report**. The Verification Reports list screen displays.

To complete or modify a Verification Collection Report

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Verification Report**. The Verification Reports list screen displays.
3. Select Modify next to the year that you would like to enter data into the Verification Report. The Verification Report screen for the designated year selected is displayed.
4. Enter information into the screen fields provided.
5. Select **Save**. A confirmation screen displays.

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

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

To delete a Verification Collection Report

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Verification Report**. The Verification Reports list screen displays.
3. Select **Modify** next to the year that you would like to delete an existing Verification Collection Report. The Verification Collection Report screen for the designated year selected is displayed.
4. Select **DELETE** on the Edit menu in the top-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.
7. Select **Finish**.



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

Food Safety Inspections

The Food Safety Inspections screen allows Organizations to enter annual food safety inspection information for each of their sites. Food Safety Inspection reports are submitted for the current year.

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

To access a Food Safety Inspections report

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Food Safety Inspections**. The Food Safety Inspections list screen displays.

To complete or modify a Food Safety Inspections report

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Food Safety Inspections**. The Food Safety Inspections list screen displays.

3. Select **Modify** next to the year that you would like to enter data into the Food Safety Inspections screen. The Food Safety Inspections screen for the designated year selected is displayed.
4. Enter information into the screen fields provided.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Food Safety Inspections screen.
-OR-
Select **Finish** to return to the Food Safety Inspections list screen.

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

To delete a Food Safety Inspections report

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Food Safety Inspections**. The Food Safety Inspections list screen displays.
3. Select **Modify** next to the year that you would like to enter data into the Food Safety Inspections screen. The Food Safety Inspections screen for the designated year selected is displayed.
4. Select **DELETE** on the Edit menu in the top-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.
7. Select **Finish**.



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

4

Claims

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

About the Claims Process

A Organization submits a reimbursement claim to the State for every month in which one or more sites participates in the School Nutrition Programs. Organizations may enter Organization and site information into the monthly claim form beginning at the first of every month. Organizations have sixty days from the last day of the claim month/year to submit an original claim

Note: Claims cannot be created for a month if there is no approved Application Packet in effect for that period. If you cannot access claims for a specific month, be sure your Application Packet has been approved. If your Application Packet has been approved and you still cannot enter a claim for a specific month, contact the Patti Harding at ptti.harding@.gov to validate the effective date of the Organization application and Site application.

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

Claims Menu

Select Claims from the blue menu bar. Organizations use the Claims Menu to access claim functions, view current claim rates, or view payment summaries. Click on

Item	Description
Claim - SNP	School Nutrition Program Claims
Claim Rates	View current claim rates
Payment Summary	Summary of payments made to this Organization

Figure 18: Claims Menu

Claim Dates

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

Date	Description
Date Created	This date is set to the current system date when the claim is initially created.
Date Modified	This date is set to the current system date when the claim is initially created and each time the claim is saved.
Date Received	This date is typically set to the date the claim was first submitted to the State. The date can be changed by an authorized State user via the Internal Use Only section of the claim form until the claim has been processed for payment. The value of this field is used to validate the 60 day claim rules.
Date Accepted	<p>This date is set to the current system date each time the claim is submitted for payment and contains no errors. If errors are detected during the submit process, the date is not set.</p> <p>These claims are identified with a status of “Accepted”. Accepted claims can be modified until they are included in a payment batch.</p>
Date Processed	<p>This is the date that the claim was added by the State into the batch payment process (via Payment Tracking in the Accounting module). Once the claim has been added to a batch (i.e., “batched”), it cannot be modified.</p> <p>These claims are identified with a status of “*Accepted” until the batch process has completed. When the batch process is completed, the status of the claim is “Processed”.</p> <p>If a change is required to a claim that has a status of “*Accepted” or “Processed”, a revised claim must be entered into the system.</p>

Claim - SNP

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

To access Claim - SNP

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

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

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

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

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

Claim Year Summary

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

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

Claim Month	Adj Number	Claim Status	Date Received	Date Processed	Earned Amount
Jul 2010					\$0.00
Aug 2010					\$0.00
Sep 2010	1	Processed	02/02/2011	02/03/2011	\$37,835.58
Oct 2010	0	Processed	02/03/2011	02/03/2011	\$34,291.36
Nov 2010					\$0.00
Dec 2010					\$0.00
Jan 2011					\$0.00
Feb 2011					\$0.00
Mar 2011					\$0.00
Apr 2011					\$0.00
May 2011					\$0.00
Jun 2011					\$0.00
Year to Date Totals					\$72,126.94

Figure 19: Claim Year Summary screen

Claim Month Details

The Claim Year Summary screen click on the month you want to access. If the claim has been processed, the options are View (to view the completed claim form) or Summary (to view the calculated payment related to the claim.).

Claim Month: September 2013

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View Summary	0	10/01/2013	10/01/2013	10/17/2013	\$21,906.46	Processed
Total Earned					\$21,906.46	

Figure 20: Claim Month Details Screen – Example of Processed Claims

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

Claim Month: October 2010

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

Figure 21: Claim Month Details Screen – Example of Non-Processed Claims

Note: Claims can be modified UNTIL the system is locked for processing. The system is locked at 3:00PM on the 15th of each month. If the 15th is on a weekend or State holiday the system will be closed the next business day at 3:00PM.

Claim Site List

From the Claim Month Detail screen click View, Modify or Summary. The claim site list screen will display to select the site whose claim to add, view, or modify.

Note: Only active sites will have a link to open the Claim for Reimbursement screen.

2010 - 2011 SNP Claim Site List

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

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

Internal Use Only

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

Figure 22: Claim Site List screen

To add an original claim

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

1. From the Claims menu, select the type of claim you would like to enter (e.g., SNP or FFVP). The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select **Add Original Claim** button. The Claim Site List screen displays.

Under Actions, select **Add** to the left of the Site Name you wish to add an original claim. The SNP Site Claim Report screen displays.

Claim Month: April 2014

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

[< Back](#) [Add Original Claim](#)

Figure 23: Claim Month Details screen – Add Original Claim

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

4. Enter claim information for all enrolled programs. Only the programs identified in an approved Application Packet with the appropriate effective date will be available for data entry.
5. Select **Save**. If there are errors click **Correct Now** to resolve the errors or **Correct Later** to correct at a later time. If there are no errors, the Claim Site List Screen displays.
6. Review the list to be sure all sites are completed.

To make a modification or correction to the claim, select the **Modify** to return to the Site Claim Report.

To submit the claim, click the **Continue** box. Review claim and check the **Certification** box. —Select the **Submit for Payment** button.

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



WARNING: An original claim cannot be submitted by a Organization if the received date is more than 60-days since the last day of claim month/year. For exceptions to this rule, contact Patti Harding at patti.harding@gov.

To modify an un-processed claim

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

1. From the Claims menu, select the type of claim you would like to view (e.g., SNP or FFVP). The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select Modify and the SNP Claim Site List will be displayed.

Under Actions, select **Modify** to the left of the Site Name you wish to view. The Site Claim Report will be displayed.

Claim Month: October 2010						
Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View Modify Summary	0	01/26/2011			\$1,151.70	Pending
Total Earned					\$1,151.70	

Figure 24: Claim Month Details screen – Modify an Un-processed Claim

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

4. Update claim information.
5. Select **Save**. If there are errors click **Correct Now** to resolve the errors or **Correct Later** to correct at a later time. If there are no errors, the Claim Site List Screen displays.
6. Review the list to be sure all sites are completed.

To make a modification or correction to the claim, select the Modify to return to the Site Claim Report.

To submit the claim, click the Continue box. Review claim and check the Certification box. —Select the **Submit for Payment** button.

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



WARNING: An original claim cannot be submitted by a Organization if the received date is more than 60-days since the last day of claim month/year. For exceptions to this rule, contact Patti Harding at patti.harding@gov.

To revise a processed Organization-level claim

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

1. From the Claims menu, select the type of claim you would like to enter (e.g., SNP or FFVP). The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select **Add Revision** button. The SNP Claim Site List screen displays.

Claim Month: October 2010

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

Figure 25: Claim Month Details screen – Add Revision

Under Actions, select **Revise** to the left of the Site Name whose claim you wish to revise. The SNP Site Claim Report screen displays.

4. Select **Save**. If there are errors click **Correct Now** to resolve the errors or **Correct Later** to correct at a later time. If there are no errors, the Claim Site List Screen displays.
5. Review the list to be sure all sites are completed.

To make a modification or correction to the claim, select the Modify to return to the Site Claim Report.

To submit the claim, click the Continue box. Review claim and check the Certification box. —Select the **Submit for Payment** button.

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



WARNING: An upward adjusted claim cannot be submitted by a Organization if the received date is more than 60-days since the last day of claim month/year. For exceptions to this rule, contact Patti Harding at patti.harding@.gov.

To view a claim

1. From the Claims menu, select the type of claim you would like to view (e.g., SNP or FFVP). The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select **View**. The SNP Claim Site List Screen will display.

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

To view a Claim Summary

The Claim Summary allows you to view a summary of the month's claim in an easy-to-read or print format. No modifications can be made from this page.

1. From the Claims menu, select the type of claim you would like to view (e.g., SNP or FFVP). The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select **Summary**. The Claim for Reimbursement Summary screen displays. To print this screen, use Ctrl P.

On the lower left of the screen, click on Show Site Meal Details. The meal counts by site will be displayed.

Month/Year Claimed	Adjustment Number	Date Received	Date Accepted	Date Processed	Reason Code
Sep 2013	0	10/01/2013	10/01/2013	10/17/2013	Original
Organization Totals					
Meal Type	Meals/Supplements Served		Federal Rate	Reimbursement Federal Amount	
National School Lunch Program					
Free	4,400		2.9300	12,892.00	
Reduced	1,033		2.5300	2,613.49	
Paid	4,884		0.2800	1,367.52	
Total	10,317			16,873.01	
Performance-Based Reimbursement (Lunch)					
Claimed	10,317		0.0600	619.02	
Adjusted	0		0.0600	0.00	
Total	10,317			619.02	
Claim Reimbursement Total				17,492.03	

Figure 26: Claim for Reimbursement Summary screen

To delete a claim

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

1. From the Claims menu, select the type of claim you would like to view (e.g., SNP FFVP). The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
Select **Modify**. The SNP Claim Site List screen displays. Under Actions, select **Modify** to the left of the Site Name you wish to view. The Site Claim Report screen displays.
3. Select **Delete** in the Edit menu in the upper-right corner.
4. The system transfers you to the bottom of the screen and a warning message is displayed.
5. Select the **Delete** button at the bottom of the page. A confirmation message displays.
6. Select **Continue**. Claim **deleted**.



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

Payment Summary

The Payment Summary screen provides a list of all payment processed for the Organization for the selected school year. Payments are grouped by program and sorted by date. The Organization’s payment summary displays the following items:

To access Payment Summary

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

Schedule Number	Processed Date	Warrant Issue Date	Earned Amount	Adjustments	Distribution Amount
11020401	02/04/2011		\$ 3,311.70	\$ 0.00	\$ 3,311.70
11012402	01/24/2011		\$ 12,850.30	\$ 0.00	\$ 12,850.30

Figure 27: Payment Summary List screen

To view a Payment Summary

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

Schedule Number	Schedule Process Date	Federal Year	Fund Authority
11020401	02/04/2011	2010-2011	USDA - Federal Funds

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

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

Figure 28: Payment Summary screen



Security

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

Security menu

The Security menu option within the School Nutrition Programs module is the access point to the Change Password.

To access the Security menu

1. Select **Security** on the blue menu bar at the top of the page. The Security menu displays.
2. Select Change Password and the Change Password screen will display.
3. Enter the new password and then Re-enter your new password for confirmation.
4. Select **Save** to continue to the Programs page.



TIP: Strong, secure passwords contain between 6 and 15 characters, including numbers, upper-case, and lower-case letters.

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

The screenshot shows the 'School Nutrition Programs' interface. At the top, there is a navigation bar with 'Applications', 'Claims', 'Compliance', 'Reports', 'Security', and 'Search'. On the right side of the navigation bar, there is a logo for 'IOWA CNP' and links for 'Year', 'Help', and 'Log Out'. Below the navigation bar, the breadcrumb trail reads 'Security > Change Password >'. The main content area is titled 'Change Password' and contains the instruction: 'Please enter your new password, then re-enter your new password to verify it. Select Save to continue.' There are two input fields: 'New Password:' and 'Re-Enter New Password:'. At the bottom of the form, there are two buttons: 'Save' (in red) and 'Cancel' (in gray).

6

Application Packet Process

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

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

Submitting an Application Packet

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

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

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

- The Organization Application must contain no errors.
- At least one Site Application must exist and contain no errors.
- If the Organization is using a Food Service Management Company (FSMC), at least one contract must exist and contain no errors.
- All items in the Checklist must be submitted (submitted checkbox checked and date submitted is entered).
- The Organization is not closed.

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

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

Application Packet Statuses

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

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

- By denying an Application Packet, the status of all items within the packet is automatically set to “Denied”.
 - An “Approved” packet cannot be “Denied”.
- Returned for Corrections
 - The packet has a status of “Returned for Corrections” when the State selects the **Return** button on the Application Packet screen.
 - This status unlocks the packet for the Organization and sets the status back to “Not Submitted”.
 - An “Approved” packet cannot be “Returned for Corrections”.
- Withdrawn
 - The packet has a status of “Withdrawn” when the Organization or State selects the **Withdraw** button on the Application Packet screen.
 - An Application Packet with a status of “First Level Approved” can be withdrawn.
 - An Application Packet with a status of “Approved” packet cannot be “Withdrawn”. If an application has been “Approved”, it can only be “Cancelled” or “Terminated” by the State (see *Application Packet* section).

Application Statuses

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

- Pending Validation
 - The application has a status of “Pending Validation” when the application has not yet been opened or saved.
- Error
 - The application has a status of “Error” if it has failed system validation rules. Data entered is maintained.
- Not Submitted
 - The application has a status of “Not Submitted” when the application is saved without error, but the Application Packet has not been submitted to the State.
- Submitted
 - The application has a status of “Submitted” when the Organization has submitted the Application Packet to the State for review (i.e., the Organization has selected the **Submit for Approval** button).
 - Any application that is marked “Not Submitted” is changed to “Submitted”
 - The Application Packet becomes read-only to Organization users.
- Approved

- The application has a status of “Approved” when the State has approved the application (i.e., the State selected “Approved” in the Internal Use Only section of the form).
 - Denied
 - The application has a status of “Denied” when the State has denied the application (i.e., the State selected “Denied” in the Internal Use Only section of the form).
 - If the application is “Denied”, it can no longer be modified by the Organization. Only the State can change the status of the application.
 - When setting the application status to “Denied”, the State should enter a comment in the Comments to Organization field explaining the reason the application was denied.
 - Returned for Correction
 - The application has a status of “Returned for Correction” when the State has identified errors in the application and has selected “Returned for Correction” in the Internal Use Only section of the form.
 - When setting the application status to “Returned for Correction”, the State should enter a comment in the Comments to Organization field explaining the reason the application was returned.
 - Withdrawn
 - The application has a status of “Withdrawn” when the State has selected “Withdrawn” in the Internal Use Only section of the form.
 - If the Application Packet has ever been approved, there will not be an option to withdraw.

Claim Statuses

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

- Not Eligible
 - The claim has a status of “Not Eligible” when there is an application condition that is preventing claiming for the selected month (e.g., Organization or site is not authorized on the Application Packet to operate for the selected month or the Application Packet status is not “Approved”).
- Incomplete
 - The claim has a status of “Incomplete” when the claim has been created in the system but the **Save** button was never clicked (e.g., timeout, logout, etc.). The system saves the data that has been entered, but no edits have been performed.
- Error
 - The claim has a status of “Error” when the claim has been submitted and has business rule violations.
-

- Pending
 - The claim has a status of “Pending” when the claim has been saved and on-line edits have been performed, but the claim has not been submitted and validated with additional edits (e.g., 60 days edit, etc.).
- Validated
 - This site claim has a status of “Validated” when the site claim has been entered, validated, and contains no errors.
- Accepted
 - The claim has a status of “Accepted” when the claim has passed all on-line edits and additional edits (e.g., 60 days edit, etc.), and is ready to be included in the payment tracking process.
 - The claim can still be modified. A revision is not necessary until the claim is included by the State in a batch payment process.
- *Accepted
 - The claim has a status of “*Accepted” when the claim has been selected by the State for inclusion in the batch payment process; however, the batch process has not run.
 - The claim cannot be modified. If the claim requires a change, a revised claim must be submitted.
- Processed
 - Claim has been fully processed by IDE and has been sent to the State’s Accounting Office for disbursement of funds.