My Food Program

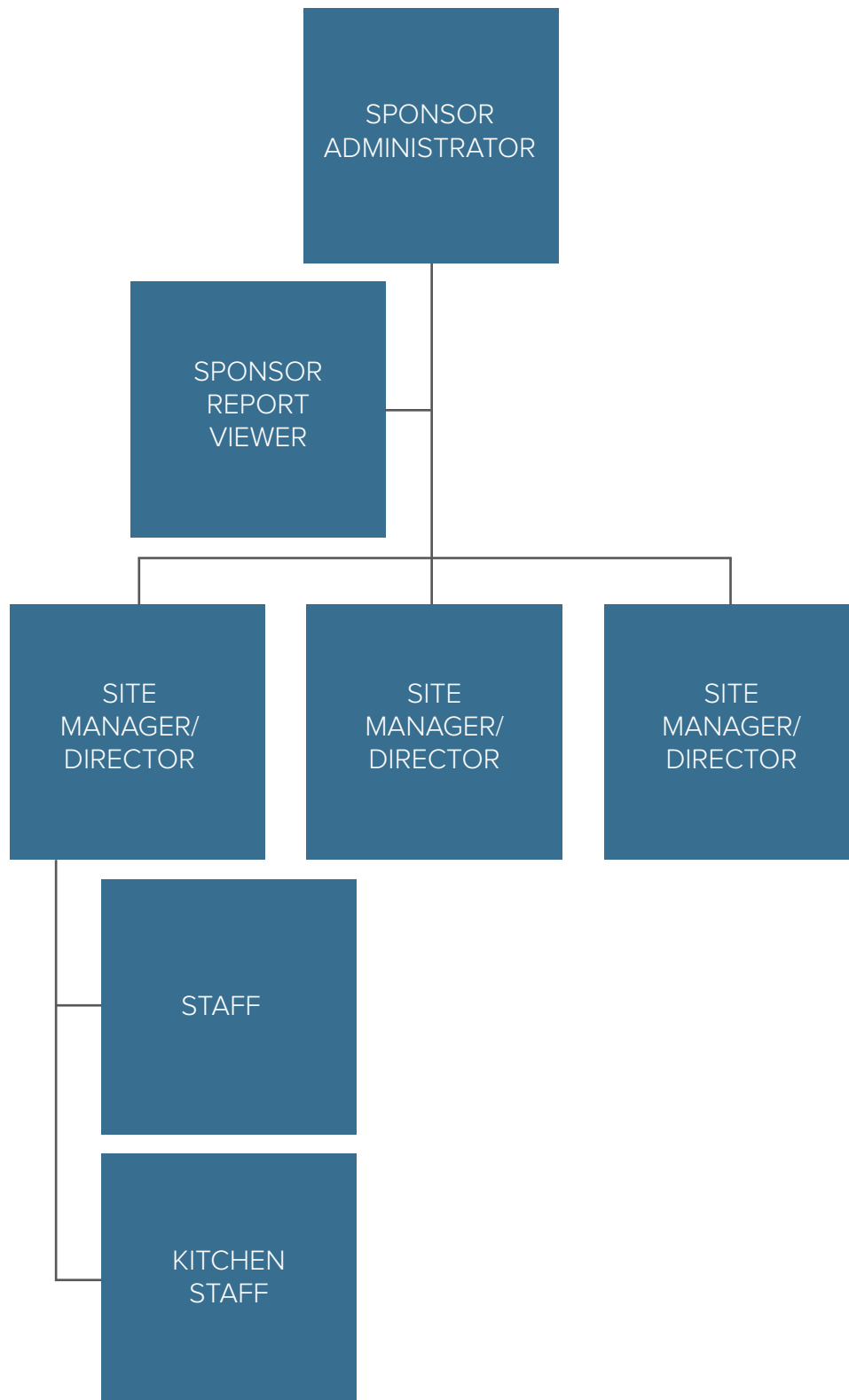## Summer Food Service Program Sponsor Admin: User Guide

Welcome to My Food Program! This User Guide will help you navigate your way through the My Food Program website. You will find a section for each area of the website which includes instructions for getting up and running. This is meant to be the optimal method of setting up My Food Program. Certain features work better if you input data in a specific order, as it allows you to match up certain data fields. While there is no "wrong" way to enter data, this guide will walk you through in a way that will minimize your effort. If you still have questions, please don't hesitate to contact us at info@myfoodprogram.com or 651-433-7345.
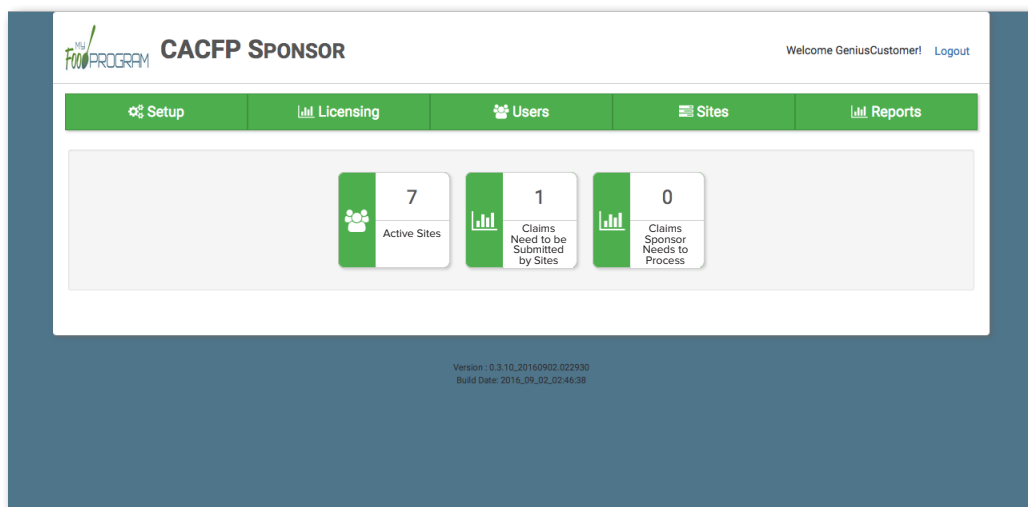
Above is a sample of your My Food Program dashboard. You are able to add your company logo to further personalize this page by going to the Setup tab.

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Add/Delete/Edit/Remove Sites	✔				
Add and Remove Admin Users	✔				
Edit Sponsor Setup Information	✔				
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Add/Delete/Edit Organization Licensing Age Ranges	✔	✔			
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View Expenses	✔		✔		
Add/Edit Expenses	✔		✔		
Submit a Claim	✔		✔		
View a Claim	✔		✔		
Edit a Submitted Claim	✔				

Sponsor Level

The Sponsor Setup tab has all the essential information about your sponsorship.

All fields below are required:

- <u>Name</u>: the name that you would like to appear on all forms
- <u>Legal Name</u>
- <u>Sponsor Identification Number</u>: typically assigned by the state agency
- <u>Status</u>: active/inactive
- <u>Address, City, State, ZIP</u>
- <u>Email Address</u>: this is the primary email contact for the sponsorship
- <u>Phone</u>
- <u>Logo</u>: the logo you upload here will be the one your sites see when they login to My Food Program. If you do not upload a logo here, then your sites will see the My Food Program logo when they login.
- <u>Allowed Meal Types</u>: these are the meal types that are possible to be added by sites. For example, if "Early Snack" is not a meal that is eligible for reimbursement in your state, then leave this box unchecked and no sites can add an early snack in error.

Sponsor Setup

Name	Test Sponsor
Legal Name	Test Sponsor
Sponsor Identification Number	TEST SPONSOR
Status	Active
Address 1	123 Main Street
Address 2	
City	Atlanta
State	Georgia
Zip	55555
Email Address	info@myfoodprogram.com
Phone	(651) 433-7345
Logo	Browse...

Sponsor Principals:

If you wish to track sponsor principal individuals and their training, you can do that here.

To add a sponsor principal::

- Click on "Setup" from the main sponsor dashboard.
- Click the blue "Add" button.
- Complete the fields:
    - ○ **Name (required)**: include the name as it appears on official documents.
    - ○ **Position (required)**: job title or position on the Board of Directors (for non-profit).
    - ○ **Birthdate (required)**
    - ○ Term Dates (optional): for members of the Board of Directors.
    - ○ **Address (required)**: assists with identification.
    - ○ **Email Address (required)**
    - ○ Employer (optional): if Board Member.
    - ○ Job Title at Employer (optional).
    - ○ Conflicts (optional): record conflicts of interest.
    - ○ Checkboxes for "Can Vote" and "Receives Compensation" (optional).
- Click "Save".

Sponsor Principal

Name	
Position	
Birthdate	
Term Dates	
Address	
Email	
Employer Name	
Job Title at Employer	
Conflicts of Interest	

☐ Voting Member of Board
☐ Compensation For Serving

Save

Sponsor users are employees or contractors with the sponsoring organization that should have access to information about all sites under a sponsorship. If you would like an individual to only have access to some sites, you should add them as site-level users instead. See separate instructions for details.

To add a sponsor user:

- Click on "Users" on the main sponsor dashboard.
- Click on the blue "Add" button.
- Enter the fields:
    - **Name (required)**
    - **Username (required)**
    - **Password (required)**: must be at least 12 characters.
    - **Confirm Password (required)**
    - Email Address (optional)
    - Phone Number (optional)
    - Start Date (optional)
    - End Date (optional)
    - Status: active/inactive. A sponsor user marked as inactive will not be able to log in.
    - **Role (required)**: select "Sponsor Admin" which gives full permission to all sponsor and site-level information or "Sponsor Reporter" which is mostly read-only. For more information, refer to the Permissions Matrix.
    - Notes: for your records.

Staff Info

Name	
User Name	
Password	
Confirm Password	
Email Address	
Phone Number	
Start Date	
End Date	
Status	Active
Roles	☐ Sponsor Admin
	☐ Sponsor Reports
Notes	

- Training: enter training here if you would like to use My Food Program to track training by sponsor staff.

To add a new sponsor staff training:

- Click on "Users" on the main sponsor dashboard.
- Click on the name of the sponsor user.
- Click the blue "Add" button in the training section.
- Enter the fields:
  - ○ <u>Training Date</u> **(required)**
  - ○ <u>Training Type</u> **(required)**
  - ○ <u>Description</u> (optional): for your records.
  - ○ Upload a scan or photo of the training agenda and/or signed training roster (optional).

Sponsor Staff Training

Training Date	
Training Type	Choose... ⌄
Description	
Upload Training	Browse...
	Save

Sponsor: Permissions Matrix

MY FOOD PROGRAM FUNCTION	SPONSOR ADMINS	SPONSOR REPORTS	SITE ADMIN/ DIRECTOR	SITE STAFF	SITE KITCHEN STAFF
Add/Delete/Edit/Remove Sites	✔				
Add and Remove Admin Users	✔				
Edit Sponsor Setup Information	✔				
Add/Delete/Edit Admin Principals	✔				
Add/Delete/Edit Organization Licensing Age Ranges	✔	✔			
View Claims	✔	✔	✔		
Edit Claims	✔		✔		
View Reports	✔	✔	✔		
Add/Delete/Edit Site Staff	✔		✔		
Plan Menus	✔		✔		✔
Generate Food Productions Records	✔		✔		✔
View Site Details	✔		✔		
Delete/Edit Site Details	✔				
View Expenses	✔		✔		
Add/Edit Expenses	✔		✔		
Submit a Claim	✔		✔		
View a Claim	✔		✔		
Edit a Submitted Claim	✔				

Sites can be added to My Food Program either individually or uploaded in bulk.

To add a single site:
- Click on "Sites" on the main sponsor dashboard.
- Click on the blue "Add" button in the upper right corner.
- Enter the Site Details. For information about how to set up a site, reference the guide on Site Configuration.
- Click "Save".

Sponsors that are going to use My Food Program for multiple sites can save time by creating sites using our import feature rather than creating each site individually.

To bulk import sites:
- Download the Site Import Template.
- Enter the information for your sites using copy/paste or by renaming the columns in your own spreadsheet.
- Save the document and ensure that you retain the .csv file extension. Files with Excel .xlsx extensions will not work.
- Click the blue "Upload Sites" button.
- Locate the file in with the site information.
- You will now see a list of sites. Click on the checkbox next to the word "Name" to mark all sites for upload. If you only wish to upload some sites, click them in individually. Any errors will be displayed on the far-right column; sites with errors will not be uploaded.
- Click "Save" and your sites will be uploaded.

Upload Sites

☑	Name	Type/Status	Address	Settings	Errors
☑	Happy Kid's Daycare HAPPY KIDS ID: 23892309248	Child Care Center Active	111 Huron Rd Fresno CA 95628 PST8PDT	Meal Count Type: Roster Meal Time Frame: Day Attendance: Present Requires Roster: true Self Sponsored: true Staff Allowed: true	
☑	Longmont Elementary LUSD ID: 273478347834	After School Program Inactive	222 Kimbark Ave Longmont CO 34533 MST7MDT	Meal Count Type: Headcount Meal Time Frame: Point of Service Attendance: In/Out Times Requires Roster: false Self Sponsored: false Staff Allowed: false	
☑	Grandmas Home Elders Inc ID: 77675949494	Adult Day Care Active	333 Jane Way Erie PA 12344 EST5EDT	Meal Count Type: Headcount Meal Time Frame: Day Attendance: In/Out Times Requires Roster: false Self Sponsored: false Staff Allowed: false	
	Home is Here City of Akron ID: 78346729290	Active	444 Public Road Akron OH 32324 CST6CDT	Meal Count Type: Headcount Meal Time Frame: Point of Service Attendance: Present Requires Roster: false Self Sponsored: true Staff Allowed: true	SiteType Homeless Shelter is not valid for this sponsor.

Site claims can be run individually or for all sites under a sponsorship at once. To run a claim individually, refer to the guides on claims processing. Claims that have been "Submitted to Sponsor" (i.e. through step 3 in the claims process) will be included when processing claims in bulk.

To run claims in bulk:
- Click on "Claims" on the main sponsor dashboard.
- Select the month/year for claims processing.
- Click the green "Create Claims" button. The claims creation process may take several minutes depending on the size of the sites and their configuration.
- Completed claims will appear on the screen. Clicking on the name of the site will take you to the Claim Summary page at the site level.

Claims									
Site Name	Claim Type	Days Open	Total Attendance	Total Meals	Submitted Meals	Rejected Meals	Average Daily Attendance	Payable Meals	Non Payable Meals
Summer Program	SFSP	1	1	2118	2118	0	1.0	2118	0

06/01/2018   Create Claims

The majority of reports are contained in site-level reports. Sponsor-level reports are those that aggregate data across multiple sites. The **CLiCS Report** generates a .txt file that can be directly uploaded into the Minnesota state agency claiming system, CLiCS.

To run the CLiCS Report:
- Click on "Reports" on the main sponsor dashboard.
- Click the hyperlink for CLiCS Report.
- Select the month/year for the report and add comments.
- Click the green "Generate File" button. A hyperlink will appear - click the link to download the file.

The majority of reports are contained in site-level reports. Sponsor-level reports are those that aggregate data across multiple sites.

To view information about site claims across a sponsorship:
- Click on the "Reports" tab on the main sponsor dashboard.
- Select the claiming method and the month/year for which you would like to view claims.

- Click on the green "View Claims" button.
- A summary of the claims will appear below.

- If you wish to print the report, click on the blue hyperlink for "Download PDF".

Menu

To plan a new menu:

- Click on "Menu" on the main dashboard.
- Click on the date and meal type for which you want to enter a menu.
- To plan a menu for children ages 1 and older:
  - Click on the blue "Edit Menu" button.
  - Enter the "Description for Print View". Note that whatever is entered in this box is what will appear when you print a menu. If you are planning to print and post a menu for parents, we strongly recommend that you use this description feature.
  - If you wish to use a saved menu, select it from the "Menu" drop-down, then make any changes and click Save
  - If you want to enter food items without using a saved menu:
    - Go through each of the required components and select the food item that you are using to meet that meal pattern requirement.
    - You must have a food item for each required meal component in order to save the menu.
    - You may add food items using the drop-down "favorite foods" list or you may search for items. If you use the search function, we recommend keeping your search term broad as the system will not recognize mis-spelled words or partial matches.
    - If you select a food item by mistake, simply click the red "Remove" button.
    - When you are done, click "Save". If there the menu does not meet the meal pattern requirements, you will receive an error message in red at the top. Otherwise, if the menu meets the meal pattern requirements, you will return to the menu details screen.

Menus can be edited unless:

1. A food production record has been created. If you want to edit a menu and a food production record has already been created based off that menu, then you need to delete the food production record before you can edit the menu.
2. A claim has been processed for the month. If you want to edit a menu and a claim has been created, you need to roll-back the claim, edit the menu, and then re-process the claim.

To edit a planned menu:

-   Click on "Menu" on the main dashboard.
-   Click on the date and meal you wish to edit.
-   Remove, add or substitute the food items.
-   Click "Save". If the menu you planned meets the meal pattern requirements, then you will be re-directed to the Meal Details page. If your menu does not meet the meal pattern requirements, you will see info boxes in red that will identify the errors.

My Food Program allows flexibility when it comes to recording fluid milk. Please review the two options below and begin using the milk type that works best for the requirements in your state.

Option #1:

Your State Agency does not require menus or food production records to be specific about the types of fluid milk served. When planning menus, you should use the menu item "Milk, fluid". Using this as your menu item indicates to the state agency that children are receiving milk in the appropriate fat percentage for their age category, but does not track amounts by separate milk types.

Your menu will say "Milk" and your Food Production Record will indicate how many total cups of milk of all types you served.

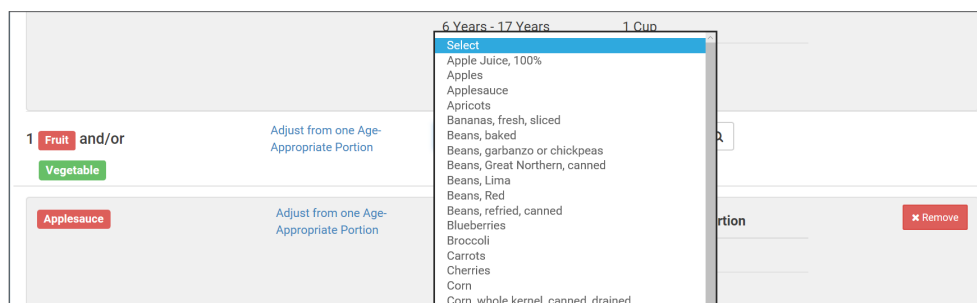**Favorite Foods**

Menu Planning

Option #2:

Your State Agency requires menus and/or food production records to be specific about the types of milk served. Before you being recording menus, **you should set all the types of fluid milk that you use as "Favorite Foods"**.

If you **do not serve a different type of milk only to those children in the "transition month"**, you will need to select **two types of milk** each time you plan a menu:

Favorite Foods

Fluid Milk

Mark as Favorite	Name
☐	1% Milk
☐	1% milk for ages 2+ (in half-pints)
☐	Lactose-free 1% milk
☐	Lactose-free skim milk
☐	Milk, fluid
☐	Milk, fluid (in gallons)
☑	Skim Milk
☐	Soymilk nutritionally equivalent to cow's milk

Favorite Foods

Fluid Milk

Mark as Favorite	Name
☑	1% Milk
☐	1% milk for ages 2+ (in half-pints)
☐	Lactose-free 1% milk
☐	Lactose-free skim milk
☐	Milk, fluid
☐	Milk, fluid (in gallons)
☐	Skim Milk
☐	Soymilk nutritionally equivalent to cow's milk

As you are planning menus, you may find that you use the same foods over and over. It would take a considerable amount of time to search for a food item each time you want to include it in a menu. That's where favorite foods comes in. If a food item is designated as a favorite, it will appear in the drop-down menu when planning menus.

A few items are automatically set to be favorites. To add or remove items from your favorite foods list:
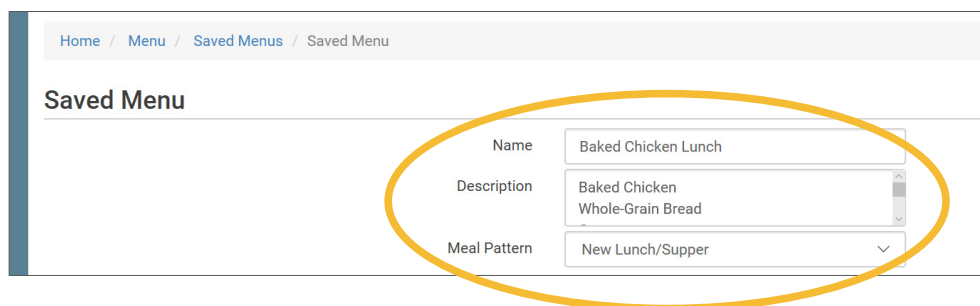
- Click on "Menu" from the main dashboard.
- Click on "Favorite Foods" in the upper-left corner.
- Check the box next to food items that you want as favorites.
- Uncheck the box next to any food items that you want to remove as favorites.
- Click "Save".
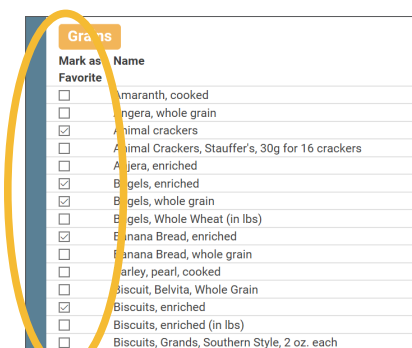
Saved menus reduce the amount of time it takes to plan and record the food items that you are going to use to satisfy each meal pattern group. There are two ways to create a saved menu.

Method #1 to Create a New Saved Menu:
- Click on "Menu" from the main dashboard.
- Click on "View Menus".
- Click on the blue "Add Menu" button on the upper-right corner.
- Complete the fields for:
  - Name: this is a required field and will be the name that will appear in the drop-down when you plan your daily menus. You may name it with just an entree, for example "Baked Chicken Lunch", or with a list of the food items, for example "Yogurt and Crackers" or with the information from a cycle menu plan, for example "Monday Breakfast Week 1".
  - Description: the description is what will appear on the printed version of your menu. If you do not enter any text in the "Description" box, then the names of the food items will appear on the printed version of your menu. If you plan to print and post your menu, it would be best to complete the description.
  - Meal Pattern: this is a required field. Select whether you are planning a breakfast, snack or lunch/supper so that the correct meal pattern appears during menu planning.

- Enter the food items for your saved menu using favorite foods and/or the food search function.
- Click "Save".
- Your new Saved Menu now appears as a choice when completing a daily menu.

Saved menus reduce the amount of time it takes to plan and record the food items that you are going to use to satisfy each meal pattern group. There are two ways to create a saved menu.

Method #2 to Create a New Saved Menu:
- Click on "Menu" from the main dashboard.
- Click on the date and meal type that you want to plan, for example, lunch on July 27.
- Complete the steps to plan a menu by adding required food items using favorite foods and/or the food item search function.
- Click "Save" to return to the Meal Details screen.
- Click the blue "Save Menu" button underneath the Menu.
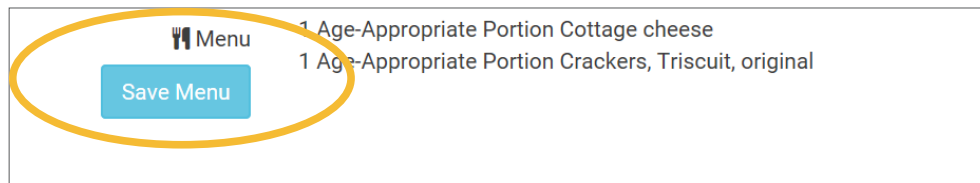
- Make any edits and click "Save".
- Your new Saved Menu now appears as a choice when completing a daily menu.

A saved menu can be edited at any time. Be aware that any meals that were recorded using that saved menu in the past **will not be changed**. If you need to change the food items served on a particular day, you will need to edit the planned menu.

To edit a saved menu:

- Click on "Menu" from the main dashboard.
- Click on "View Menus" in the upper-left corner.
- Click on the name of the saved menu that you want to edit.
- Make any changes to the menu that you need by removing and/or adding items. You can also change the Name and Description of the menu. You should not change the Meal Pattern associated with the saved menu.
- When you are done making changes, click "Save".
- The edited saved menu is now available on your list.

Menu: Saved Menus: Copying a Saved Menu

A saved menu can be copied. You would use this feature if you are creating a new saved menu with food items that are substantially the same. For example, if you have a saved menu of Pancakes, Applesauce and Milk and you want to create a new saved menu with Waffles, Applesauce and Milk. Copying the saved menu with pancakes may be faster than creating a new saved menu.

To copy a saved menu:

- Click on "Menu" on the main dashboard.
- Click on "View Menus" in the upper-left corner.
- Locate the saved menu that you want to copy and click on the blue "Copy" button on the far right side.

| Tuesday Lunch | Whole Grain Macaroni/Cheese Broccoli Pineapple Milk | 1.00 Broccoli
1.00 Cheese, american, cheddar,mozzarella, or swiss
1.00 Pineapple
1.00 1% Milk for all participants 2 and older
1.00 Whole milk for ages 12-23 months
1.00 Pasta, macaroni, whole grain | New Lunch/Supper | Copy |
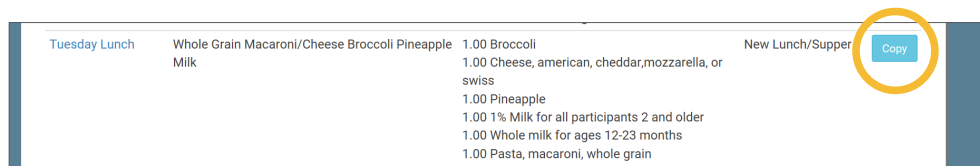
- Make any changes to the saved menu. Note: you need to give each saved menu a unique name. You should not change the Meal Pattern associated with the saved menu.
- Click "Save".
- Your new saved menu is now available for menu planning.

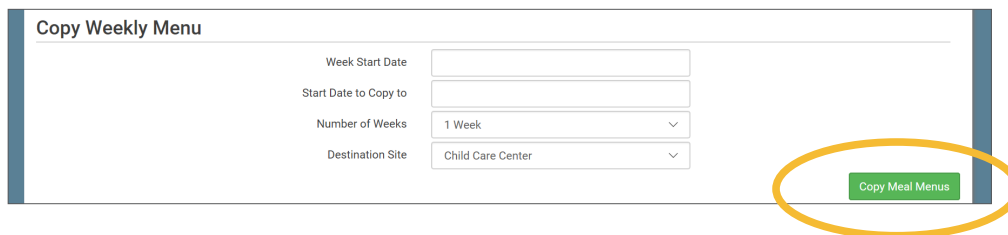Menus can be copied from one week to any other week and within sites under the same sponsor.

To copy a menu:
- Click on "Menu" from the main dashboard.
- Scroll to the bottom of the menu calendar page to the section titled "Copy Weekly Menu".

- All fields are required:
    - <u>Week Start Date</u>: this is the week that is your master copy. Only Sundays will be able to be selected. **You can only copy by the week. You cannot copy only one day to another day.**
    - <u>Start Date to Copy to</u>: this is where your new menu will appear. **The week that you are copying TO must be empty.** If you attempt to copy a menu to a week with any menus planned, you will get an error.
    - <u>Number of weeks</u>: you may choose to copy up to 6 weeks of menus to another period of 6 weeks. This is especially helpful for programs that use a rotating menu.
    - <u>Destination Site</u> (**note**: this option does not appear for any site-level staff. This option is only available to sponsor admin users): the drop-down menu defaults to the current site. If you wish to copy menus from one site to another site, then select the destination site here.
- Click "Copy Meal Menus".
- You can confirm that the menus were copied by looking for the icons on the menu calendar page.

A menu can be printed directly from the My Food Program web app or by exported into Excel. **Note: the words that appear in print view are from the "Description" field in each day's menu if that is completed. If the "Description" field is left blank, then the name of the food item is placed on the printed menu.** If you are planning to post a menu for parents to see, we highly recommend completing the "Description" field on each day's menu.

To print a menu:

- Click on "Menu" on the main dashboard.
- Select the month and year that you would like to print.
- Scroll to the bottom and select one of the following:
  - "Print View" will open a print-friendly web page. Use your web browser's print function to generate a printed version of your menu. Landscape orientation is usually best.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
	Breakfast: English Muffins, Apples and Milk. AM Snack: Cottage Cheese Triscuit Lunch: Pork, Bread, Mixed Vegetables, Pears, Milk PM Snack: Cottage Cheese Triscuit	Breakfast: Sausage Applesauce Milk AM Snack: Cottage Cheese Triscuit Lunch: Mac & Cheese Peas Pears Milk PM Snack: Cottage Cheese Triscuit	Breakfast: English Muffins, Apples and Milk. AM Snack: Cottage Cheese Triscuit Lunch: Pork, Bread, Mixed Vegetables, Pears, Milk PM Snack: Cottage Cheese Triscuit	Breakfast: Total Cereal, Applesauce, Milk AM Snack: Cottage Cheese Triscuit Lunch: Mac & Cheese, Peas, Pears, Milk PM Snack: Cottage Cheese Triscuit	Breakfast: Sausage Applesauce Milk AM Snack: Cottage Cheese Triscuit Lunch: Mac & Cheese, Peas, Pears, Milk PM Snack: Cottage Cheese Triscuit	

  - "Export to Excel". After you click "Export to Excel" a report will be generated and the page will refresh. Click on "Download Excel Report" and save the Excel document in your location of choice. Once in Excel, you can modify the food items, fonts, column widths and add your own logo and images. Note that any changes you make to the menu in Excel will not be transferred to My Food Program. Substitutions and menu changes must be recorded directly in My Food Program.

Monday	Tuesday	Wednesday	Thursday	Friday
28	29	30	31	1
Breakfast	Breakfast	Breakfast	Breakfast	Breakfast
Cereal, Juice, Milk	Cereal, Juice, Milk	Cereal, Juice, Milk	Cereal, Juice, Milk	Cereal, Juice, Milk
AM Snack	AM Snack	AM Snack	AM Snack	AM Snack
Animal Crackers Milk	Cheez Its & Milk	Animal Crackers Milk	Goldfish Crackers Milk	Goldfish Crackers Milk
Lunch	Lunch	Lunch	Lunch	Lunch
Chicken Legs Enriched White Rice Bananas Mixed Vegetables Milk	Macaroni Beef Mixed Vegetables Fruit Cocktail Milk	Macaroni Beef Mixed Vegetables Fruit Cocktail Milk	Beef Stew Mixed Vegetables Banana Dinner Roll Milk	Chicken Quesadilla French Fries Fruit Cocktail Milk

You may delete a menu as long as the meal has not been included in a claim. If a food production record has been created based on the menu, deleting the menu will ALSO delete the food production record. This is to ensure that the menu and food production record always match.

To delete a menu:
- Click on Menu on the main dashboard.
- Click on the date and meal that you want to delete.
- Click the red "Delete Menu" or "Delete Infant Menu" button.
- The menu is now deleted and the fork/knife icon disappears from the menu calendar.

Before creating a new food production record:

1. Make sure that a menu is planned. If no menu is planned, the button "Edit Food Production" will not appear.
2. Remember that once a food production record is finalized, the menu can no longer be edited. This is to ensure that the menu always matches the food production record.
3. Remember that only one food production record can be associated with a particular date and meal.
4. Food production records can be deleted at any time, but a menu cannot be changed if a claim has been processed.

To create a new food production record:

- Click on "Menu" on the main dashboard.
- Click on the date and meal for which you would like to generate a food production record.
- Click on the blue "Edit Food Production" button in the lower right corner.
- The food production screen is divided into two parts: Food Production and Milk Production. It is separate because the age ranges for milk are different than the age ranges for food.
  - ° Food production has three columns:
    1. <u>Number of participants</u>: this is the column that will be used to generate the food production estimates. My Food Program will multiply the number of participants in each age range by the minimum portion size requirements associated with that age range. The system disregards any numbers entered in the first two rows.
    2. <u>Our Estimate</u>: this column is greyed-out because it cannot be edited. Numbers appear here if a meal count has already been entered:
       - Based on participant schedule: if information about participant schedules are completed, My Food Program can estimate how many children in each age range are likely to be attending the meal.
       - Based on meal counts: if meal counts have already been taken for the meal, then it will display the number of children in each age range that were checked in.
    3. <u>Age Range</u>: A list of the CACFP age ranges.

Food Production		
Number of participants | **Our Estimate**		**Age Range**
	0	6 Years - 12 Years
Number of participants | **Our Estimate**		**Milk Age Range**
	0	6 Years - 12 Years

Food Production

Number of participants | Our Estimate		Age Range
	0	6 Years - 12 Years

Number of participants | Our Estimate		Milk Age Range
	0	6 Years - 12 Years

- Complete the fields for "Number of Participants". If there are no participants in a particular age range, you can leave it blank. It is not necessary to type a zero into those fields.
- Click the blue "Estimate Production" button and the estimates will appear at the bottom. To generate the estimates, My Food Program multiplies the number of participants in each age range by the minimum portion size requirements associated with that age range.

Amount	Unit	Food
3.5	oz	Cottage cheese
15	Crackers	Crackers, Triscuit, original
		Save

- **NOTE: the units used in the food production records are tied to the food item that you selected on the menu.** If you wish to change the units, you must go back to the menu and select a different food item. For example, if you want your food production record to be pounds, then you need to select a food item with "(in lbs)" in the description. Otherwise, the units will default to those used in the meal pattern requirements (cups, servings, and ounces).
- Edit the estimates to reflect the actual amount of food and fluid milk produced and click "Save" to be returned to the Meal Details screen. You will now see the food production amounts listed on the Meal Details screen.

Food Production   15 Crackers Crackers, Triscuit, original
3.5 oz Cottage cheese

Once a food production estimate is created, you can see it in Food Production Reports and on the Meal Details page. However, a food production record is not locked-in until it is finalized. Advantages of taking the extra step of finalizing a food production record:

1. The menu is locked after a food production record is finalized. This means that menus cannot be edited unless the food production record is deleted. Finalizing food production records ensures that your menu will always match your food production records.
2. A date/time stamp will be associated with a finalized food production record. This assists sponsors in ensuring that food production records were created in a timely manner.

To finalize a food production record:
- Click on "Menu" on the main dashboard.
- Click on the date and meal for which you would like to finalize a food production record.
- Click on the blue "Finalize Food Production Record" in the lower right corner.
- A warning box will appear. Click "OK".
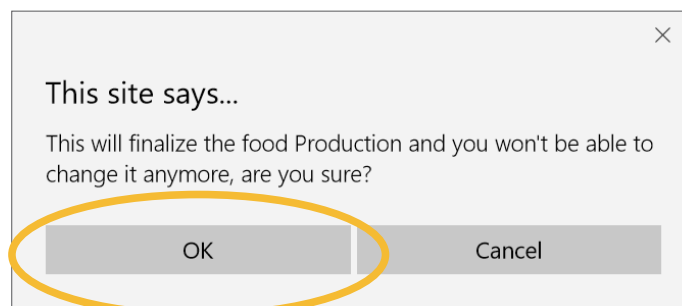
- You will now be returned to the Meal Details screen. You will note that the "Edit Menu" button is now gone and a date and time stamp is displayed for the finalized food production record.

You may wish to delete a food production record under the following circumstances:

1. You had a last-minute change to your menu and the food production record is now incorrect.
2. You made an error in the original food production record.

To delete a food production record:
- Click on "Menu" on the main dashboard.
- Click on the date and meal for which you would like to delete a food production record.
- Click on the red "Delete Food Production Record" in the lower right corner.
- You will see a warning box. Click "OK".
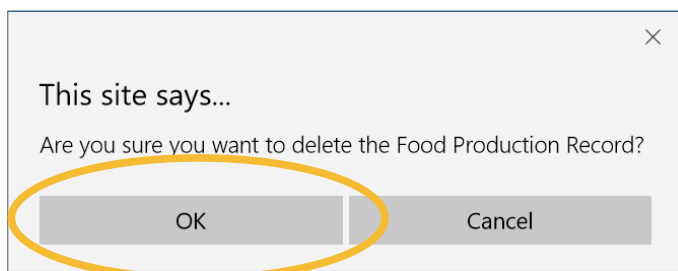
- You will be returned to the Meal Details screen. You will note that the "Edit Menu" button has now returned (unless a claim has already been processed for that month) and the time/date stamp associated with the original finalized food production record is gone.

This is an output of the food production information entered in the menu screen. It has the date, meal type, actual meal count and the amount prepared for each menu item.

The only selection required for the Food Production Report is the date range.

To run the report, make your selection for the date rage and click the green "Run Report" button. A hyperlink will appear called "Download Report". Click the hyperlink to download or view the report.

Contracting Entity		ID #					08/20/2018	

Date Served	Meal	USDA Age Range			Food Production Amounts			
07/02/2018	Breakfast		Actual Headcount	Planned Headcount	Amount	Unit	Component	Food Item
Menu		Age Range			2.75	Cup	Fruit	Apples
English Muffins, Apples and Milk.		Preschoolers	2	3	4.00	oz eq	Grains	English muffins, enriched
		School Age 1	1	1	3.25	Cup	Fluid Milk	1% Milk for all participants 2 and older
		Toddlers	3	3	1.50	Cup	Fluid Milk	Whole milk for ages 12-23 months
		Non-CACFP	1	1				
		Adult	1	1				

Date Served	Meal	USDA Age Range			Food Production Amounts			
08/02/2018	Lunch		Actual Headcount	Planned Headcount	Amount	Unit	Component	Food Item
Menu		Age Range			8.00	half pints	Fluid Milk	Whole milk for 12-23 month (in half-pints)
Beef Meatballs		Preschoolers	23	24	53.00	half pints	Fluid Milk	1% milk for ages 2+ (in half-pints)
Tater Tots		School Age 1	18	18	91.00	oz	Meat/Meat Alternate	Meatball, Ckn Trky Beef 1 oz FZN 160CT
Peaches		Toddlers	19	19	39.50	oz eq	Grains	Bun, Hamburger Wheat 4.25" FZN 8CT
Hamburger Bun		Non-CACFP	1	1	4.69	lbs	Fruit	Peaches, canned (in lbs)
Milk		Adult	1	1	5.56	lbs	Vegetable	Potato, Nugget Par-fried FZN 5 LB
		Infants						
		0-5 Months	1	1				

Food Temperatures

My Food Program can be used to track food temperatures at three different points in the process:
- When it leaves the caterer,
- When it arrives at the program, and
- When it is served.

Food temperatures can be entered using either the web app or the mobile app.

To enter a food temperature using the web app:

- Click on "Food Temps" on the main dashboard
- Dates with at least one food temperature entered will be green. Those without any food temperatures entered will be red.
- Select the meal and date from the food temperature calendar.

- Enter the food temperatures. You may enter one, two or all three food temperatures.
- Click "Save".
- You can print a summary of food temperatures in the reports section.

Meal Count

Meals counts can be recorded two ways:

- Web app through any web browser, such as Chrome, Explorer, Edge or Safari.
- Mobile app available through the Google Play or iTunes.

To take a meal count:

- Click on "Meal Count" on the main dashboard.
- Select the date, meal and roster for which you want to take a count.
- Use the up/down arrows or type a number into the box.
- Click "Save" to record the meal counts.

Note: headcount meal counts from other users will appear on the upper-left corner. If two users enter counts for the same meal on the same day, they will add together. If using headcount meal counts, we strongly recommend having only one person assigned to entering meal counts.

Meal Count:
Taking Meal Counts Using Mobile App

Meals counts can be recorded two ways:

- Web app through any web browser, such as Chrome, Explorer, Edge or Safari.
- Mobile app available through the Google Play or iTunes.

To take a meal count using mobile app:

- Click on the "Meal Count" button and select the correct roster and meal.
- Click the "Add One to Count" button until you reach the number of children eating the meals.
- Click "Submit".
- This information will be saved to the database and users who login or refresh their screens will see these children as checked in. It will also synchronize in real time with the web app.

Note: If you are attempting to serve a meal and there are no options under the "Meal" drop down menu, you are serving a meal outside of the scheduled meal time.
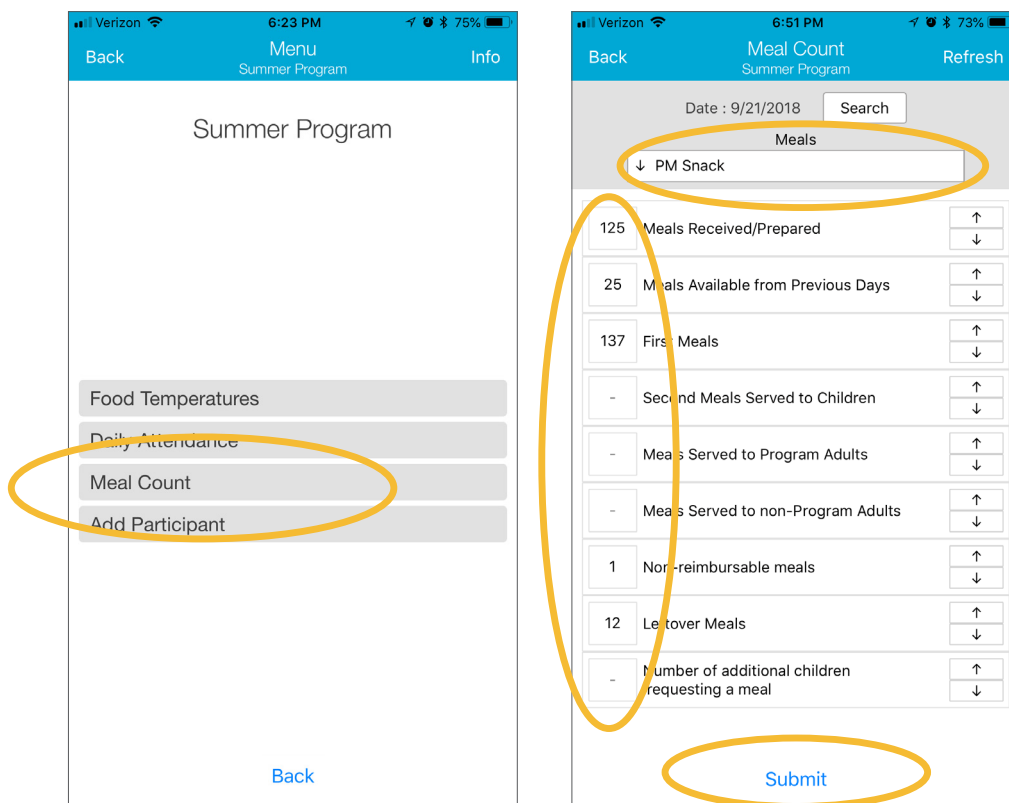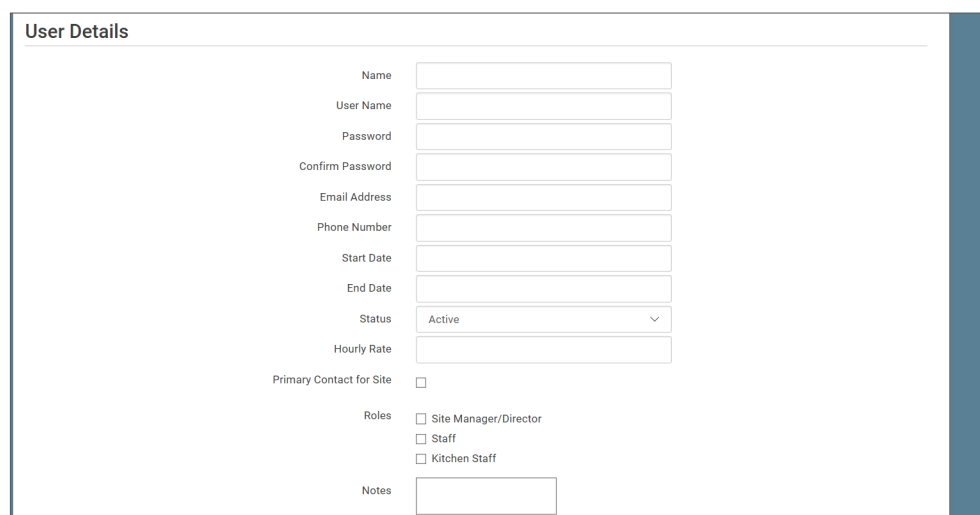
Staff

When you create a new site, you also need to create new users who can access the site. Some centers choose to have each staff person be assigned their own username and password. The main advantage to individualized login information is that you can track who is entering meal counts (or forgetting to!). On the downside, it can be difficult to manage if people routinely forget their login credentials.

To create a new site-level user:
- Click on "Staff" on the main dashboard.
- Click on the blue "Add" button in the upper-right corner.
- Enter the fields:
    - **Name (required)**
    - **User Name (required)**: this will be part of their login credentials.
    - **Password (required)**: a minimum of 12 characters. There is no requirement for upper-case, lower-case, numbers or special characters.
    - **Confirm Password (required)**: retype password.
    - Email Address (optional)
    - Phone Number (optional)
    - Start Date (optional)
    - End Date (optional)
    - **Status (required)**: a status of "active" will allow the user to login. A status of "inactive" will prevent a login
    - Hourly Rate (optional): if you are using My Food Program to track payroll expenses for the purpose of demonstrating a nonprofit meal service, enter an hourly rate here.
    - Primary Contact for Site (optional)
    - **Roles (required)**: select one of three roles. See additional materials for further explanation. Manager/director can access all site information, Staff can access meal counts, participants & rosters and record hours. Kitchen staff can access menus, meal counts, participants & rosters and record hours.
    - Notes (optional): for your recordkeeping.
- Click "Save".

Site-level users can be assigned one of three roles:

- Site Manager/Director
- Staff
- Kitchen Staff

The dashboard for a Site Manager/Director looks like this:
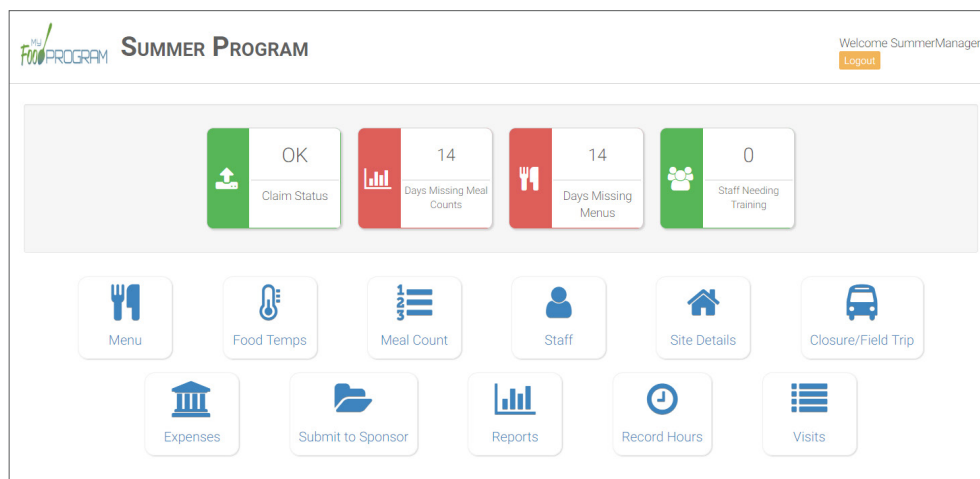
Site Manager/Directors have full access to all features.

The dashboard for a Kitchen Staff looks like this:
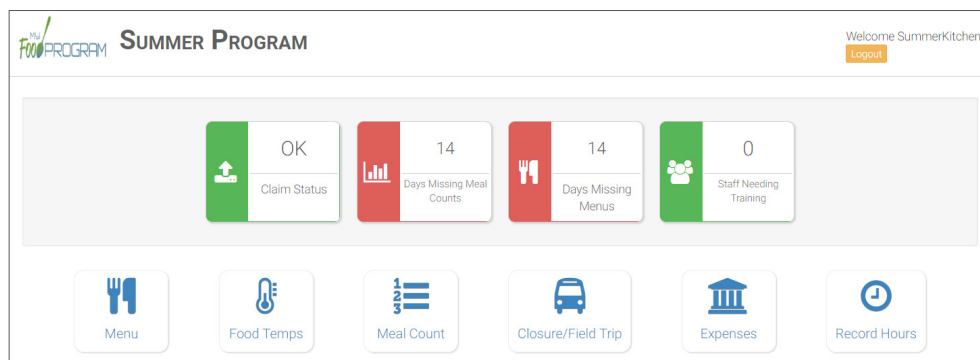
The dashboard for a Staff looks like this:
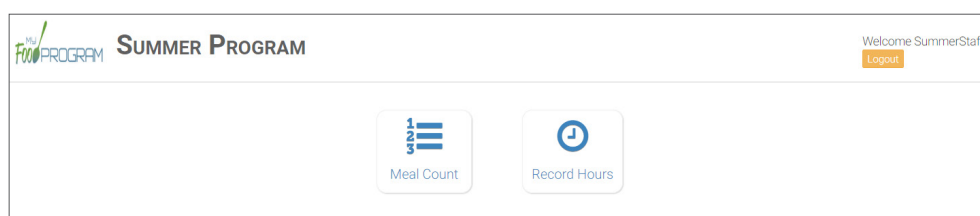
Annual staff training on Civil Rights and Food Program duties and responsibilities are a required part of participation in the CACFP. 7 CFR 226.16 states "At a minimum, such training must include instruction, appropriate to the level of staff experience and duties, on the Program's meal patterns, meal counts, claims submission and review procedures, recordkeeping requirements, and reimbursement system."

To track documentation of staff training:

- Click on "Staff" on the main dashboard.
- Click on the name of the staff person who participated in training.
- Scroll to the bottom and click the blue "Add" button in the Training section.
- Enter the fields as follows:
    - <u>Training Date</u> **(required)**: use the date picker or type in the date on which the training occurred.
    - <u>Training Type</u> **(required)**: select Civil Rights Training or Other.
    - <u>Description</u> (optional): for your recordkeeping.
    - <u>Upload Training</u>: you may wish to upload a copy of the training agenda, training materials and/or a signed training roster.
- Click "Save".

Staff Training

Training Date	
Training Type	Select ⌄
Description	
Upload Training	Browse...

One staff person can be assigned to more than one site. The most common scenario for this configuration is a caterer that provides meals for multiple sites and needs access to My Food Program in order to complete food production records.

To add an existing staff member to a new site:

- On the site on which the staff person already has a username, click on "Staff" on the main dashboard
- Click on the name of the staff person and copy their username and user code.

Name	Test Center Director
User Name	TestCenterDirector
User Code	2d66ba
Password	●●●●●●●●●●●●●

- On the site that you want to add the user to, click on "Staff" on the main dashboard
- Click the blue "Add Existing User" button on the upper-left corner
- Type their username and user code and indicate the permission level
- Click "Save".

Now when that staff person logs into My Food Program, the system will prompt them to select the site that they want to access:

Choose the Site You Wish to Work With:

Child Care Center
Test Center 2

Site Details

To create a new site within your sponsorship:

- Click "Sites" on the main sponsor dashboard.
- Click the blue "Add" button in the upper-left corner. (You can also upload sites in bulk, see separate instructions).
- Complete the fields as follows:

REQUIRED	FIELD	DESCRIPTION
✓	**Name**	enter the name of the site that you want to appear on your site list and all reports.
✓	**Type**	select the type of program (adult care, child care, afterschool program, emergency shelter). **Note:** only the types of programs that you sponsor are included as options.
✓	**Legal Name**	
	Pre-Qualifying Month	this does not apply to summer food sites.
	Intended Start Date	for your recordkeeping.
	Actual Start Date	for your recordkeeping.
	End Date	for your recordkeeping.
✓	**Profit Status**	indicate if the site is for-profit or non-profit.
✓	**Site Identification Number**	you may use any string of letters, numbers and symbols that you wish for the site identification number. For many sponsors, the site identification number is assigned by their state agency.
	Tax Identification Number	for your recordkeeping for the distribution of tax documents
	Food Contracting Entity	if your state agency assigns an ID to vended meal contractors, you can enter that here and it will appear on food production record reports.
✓	**Status**	a status of "active" will allow users to login. A status of "inactive" will prevent any users from logging in.
✓	**Address, City, State, Zip**	
	Email Address	
	Phone	
✓	**Daily Attendance Method**	this does not apply to summer food sites.
✓	**Meal Count Time Frame**	select "Point of Service" or "Day". If "Point of Service" is selected, then meal counts can only be entered during the meal time frame by staff. If "Day" is selected, then meal counts can be entered any time during the day. Meal counts can never be entered before a meal has started, regardless of the choice of meal count time frame.
	Restrict All Site Staff Meal Count Times (defaults to unchecked)	this requires even Site Director/Managers to enter meal counts within the specified time frame. If you have this box checked, then Site Director/Managers cannot go back and correct meal counts from prior days or times.

REQUIRED	FIELD	DESCRIPTION
✓	**Time Zone**	ensure that you select the correct time zone for the site as meal times are locked in accordance with the time zone adjustments.
✓	**Summer Food Area Type**	select the claiming designation for the summer site.
✓	**Meal Count Method**	Summer Food Sites should always set this to Headcount.
	Shifts are an option for Meal Times (defaults to unchecked)	this does not apply to summer food sites.
	Hide option for staff to take attendance (defaults to unchecked)	if this button is checked, staff can only take meal counts and not attendance. See separate instructions for details.
	Paper Attendance and Meal Counts are Master (defaults to unchecked)	this does not apply to summer food sites.
	Ignore Meal Validation (2016 Meal Pattern; defaults to unchecked)	if this button is checked, meals are not checked for validation at all. This means that menus can be missing all together or contain non-creditable foods. Use this feature with care and it means that you are turning off all validation of creditable meals.
	Ignore Whole Grain Meal Errors (2016 Meal Pattern; defaults to unchecked)	if this box is checked, then meal validation will occur with the exception of the requirement for one whole grain-rich food per day. **Note:** this feature will be removed after September 30, 2018, which marks the end of the grace period for the implementation of the new meal pattern requirements.
	Site is Self-Sponsored (defaults to unchecked)	use this box if you are a single-site sponsor. See separate instructions for details.
	Invoicing Feature (defaults to unchecked)	this does not apply to summer food sites.
	Hide Submit to Sponsor Button (defaults to unchecked)	some sponsors find that sites prematurely and accidently click the "Submit to Sponsor" button, which then locks them out of entering meal counts or menus. If you would like to hide the "Submit to Sponsor" button until a calendar month is complete (and therefore prevent this mistake from happening), then select this feature. The downside of this feature is that sites may wish to submit their meal counts to their sponsor prior to the completion of a calendar month (for example, the final day of a calendar month lands on a weekend).
	Allow Staff to Add Participants on Mobile	This box is checked by default. Uncheck the box if you'd like staff to be restricted from adding participants using the mobile app.
	Logo	you can upload a logo in this spot. Typically, sponsors upload their own logo here to promote their sponsorship. If no logo is uploaded, then a blank box will appear in the upper-left corner of the site dashboard. The optimal size for a logo is 110x65 pixels. Allowed file types are .jpg and .png.

REQUIRED	FIELD	DESCRIPTION
	Mobile Logo	you can upload a logo in this spot and it will be displayed if someone uses the My Food Program web app using a mobile browser.
	Site Hours (optional, but if you do not complete them, you cannot add meal times or take meal counts)	enter the times and days that the site is open using the blue "Add Hours" button on the right. If the site has different operating hours on different days of the week, you can indicate that by adding a second set of hours.
	Site Meal Times (optional, but if you do not complete them, you cannot enter menus or take meal counts)	enter the times that the site serves each meal. The amount of time that a meal lasts is not restricted, other than by the times that the site is open. However, meal times cannot overlap.
	Site USDA Dates	indicate the date that the new meal pattern was implemented at the site. Defaults to 10/1/2017.
	Site License	this does not apply to summer food sites.
	Principals	use this section to track the key staff at each site, their role in the organization and the completion of their required training. See separate instructions for details.

Sites are required to identify the key staff that are responsible for the implementation of the CACFP and provide identifying information to the sponsor in order to ensure that no key staff person is on the National Disqualified List. Entering the site principals here is for one-time recording purposes. If you wish to track their participation in annual training separately, then they should be added as Site Staff members.

To enter Principals (key staff) for a site:

- Click on "Site Details' from the main dashboard.
- Scroll down to "Principals" and click the blue "Add Principals" button.
- Enter the fields:
  - **Name (required)**: include the name as it appears on official documents.
  - **Position (required)**: job title or position on the Board of Directors (for non-profit).
  - **Birthdate** (required)
  - Term Dates (optional): for members of the Board of Directors.
  - **Address** (required): assists with identification.
  - **Email Address** (required)
  - Employer (optional): if Board Member.
  - Job Title at Employer (optional)
  - Conflicts (optional): record conflicts of interest.
  - Checkboxes for "Can Vote" and "Receives Compensation" (optional)
- Click "Save".

Site Principal

Field	
Name	
Position	
Birthdate	
Term Dates	
Address	
Email Address	
Employer	
Job Title at Employer	
Conflicts	

☐ Can Vote
☐ Receives Compensation

Save

Closure/Field Trip

The "Closure/Field Trip" section of My Food Program is intended for sites to provide prior notification to their sponsor of a site closure or a time when the children will be away from the site at meal time. This is so that a sponsor does not attempt to conduct a review visit on a day when a meal cannot be observed.

To add a new closure/field trip:
- Click on "Closure/Field Trip" on the main dashboard.
- Click the blue "Add" button in the upper-right corner.
- Complete the fields:
    - **Reason (required)**
    - **Date (required)**
    - **Meals not served at site (must select at least one)**
- Click "Save".

Field Trips and Closures

Reason Off Site	Select
Date Off Site	
Meals not served at site	Early Snack
	Breakfast
	AM Snack
	Lunch
	PM Snack
	Supper
	Evening Snack

Save

Closures/Field Trips can be logged by either the sponsor or the site to indicate the dates when meals will not be served on-site and a review visit should not be conducted.

To view closures/field trips:
- Click on "Closure/Field Trip" on the main dashboard.
- Upcoming closures and fields trips will be displayed on the screen.
- To view past closures and field trips logged, check the box "Include Closures/Field Trips Before Today".
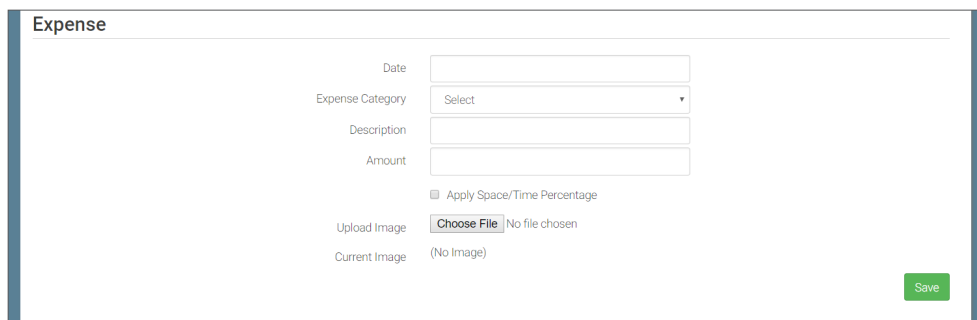
Expenses

The "Expenses" feature of My Food Program is intended for sites to upload receipts and invoices to document a nonprofit meal service.

To add a new expense:

- Click on "Expenses" on the main dashboard.
- Click the blue "Add Expense" button on the upper-right corner.
- Enter the information into the fields:
  - **Date (required)**: the date the expense was incurred
  - **Expense Category (required)**: the most common category used is Food (Actual Receipts)
  - **Description (required)**: typically used to record the store at which the item was purchased and a summary of the expense. For example "Sam's Club - paper goods"
  - **Amount (required)**
  - Apply Space/Time Percentage: check this box only if you are allocated expenses. For example, if the site has determined that they are allocating 50% of paper goods to CACFP, then they should:
    - Enter "50" as the space/time percentage in Site Details.
    - Enter the total amount spent on paper goods in the "Amount" field.
    - Check the box for "Apply Space/Time Percentage".
  - Upload Image (optional, but recommended): upload a photograph or scan of the receipt.
- Click "Save" and the expense is now viewable and will be included in expense reports.

To delete an expense:

- Click on "Expenses" on the main dashboard.
- Click on the red "Delete"button next to the expense you wish to remove. **Note:** this action is permanent and also deletes any files uploaded to the expense. Use this feature with care.

Review
Disallowed Meals

NOTE: the dashboard icon "Review Disallowed Meals" is called "Submit to Sponsor" if logged in as a site-level user. In addition, site-level users do not have a "Process Claim" dashboard button.

The claims process has five steps:

1. Meal validation ("check for errors") by the site.
2. Review and correction of any errors by the site.
3. Submission to sponsor by the site.
4. Correction of any errors and meal disallowances by the sponsor.
5. Claims creation by the sponsor.

To complete the first step in the claims creation process, meal validation ("check for errors"):

- Click on "Submit to Sponsor" on the main dashboard.
- Select the Month/Year from the upper-right drop-down menu.
- A list of meals that have not been validated appears on the screen with the following columns:
  - Date
  - Meal
  - Menu Entered: this will display "true" if a menu has been entered and "false" if a menu is missing. Depending on your site configuration, this might stop your claim from proceeding. Check site configuration for details.
  - Meal Count: the total number of children checked in for the meal across all rosters.
  - Food Production: this will display "true" if a food production record has been entered and "false" if there is no food production record. This is for information only, your claim will proceed without a food production record entered.

Submit Meal Attendance				July 2018
Date	Meal	Menu Entered	Meal Count	Food Production
07/02/2018	Breakfast	true	7	true
07/02/2018	AM Snack	true	6	false
07/02/2018	Lunch	true	7	false
07/02/2018	PM Snack	true	3	false
07/03/2018	Breakfast	true	6	false

- Scroll to the bottom of the page and click "Check for Errors".

07/20/2018	AM Snack	true	7	false
07/26/2018	Breakfast	true	2	false
07/29/2018	Breakfast	false	1	false

Check for Errors | Submit to Sponsor

- The system will now run the meals through validation. This may take several minutes. You do not need to remain on this page for the meal validation process to continue. Depending on how you have the site configured, My Food Program will be checking that:
  - Meals were entered only for dates and times that the facility was open.
  - Menus meet meal pattern requirements.
- Once the meal validation is complete, the list of meals will disappear and any errors generated will be displayed below. If there are no errors, the "Meal Errors" section will be blank. See separate instruction for details on how the site should review these errors prior to submitting their meal counts to their sponsor.

NOTE: the dashboard icon "Review Disallowed Meals" is called "Submit to Sponsor" if logged in as a site-level user. In addition, site-level users do not have a "Process Claim" dashboard button.

The claims process has five steps:

1. Meal validation ("check for errors") by the site.
2. Review and correction of any errors by the site.
3. Submission to sponsor by the site.
4. Correction of any errors and meal disallowances by the sponsor.
5. Claims creation by the sponsor.

Once step 1 is completed, a list of errors will appear on the screen. There are 18 possible errors that can be generated during meal validation. **Sites must not resolve errors unless they are genuine, have documentation and a logical explanation. If errors are true violations of SFSP rules and not incorrect input, the corresponding meals will be disallowed in the claims creation process.**

Instructions for sites to resolve genuine errors is contained in the site-level guide for managers/directors.

NOTE: the dashboard icon "Review Disallowed Meals" is called "Submit to Sponsor" if logged in as a site-level user. In addition, site-level users do not have a "Process Claim" dashboard button.

The claims process has five steps:

1. Meal validation ("check for errors") by the site.
2. Review and correction of any errors by the site.
3. Submission to sponsor by the site.
4. Correction of any errors and meal disallowances by the sponsor.
5. Claims creation by the sponsor.

Once meals have been validated by the site and any errors have been resolved, the site needs to complete step 3 to alert the sponsor that they are finished with their claim for reimbursement.

To submit a claim to a sponsor:

- Click on "Review Disallowed Meals" (logged in as sponsor) or "Submit to Sponsor" (logged in as site).
- Click on the green "Submit to Sponsor" button.
- A warning message will appear. Click "OK" to proceed.
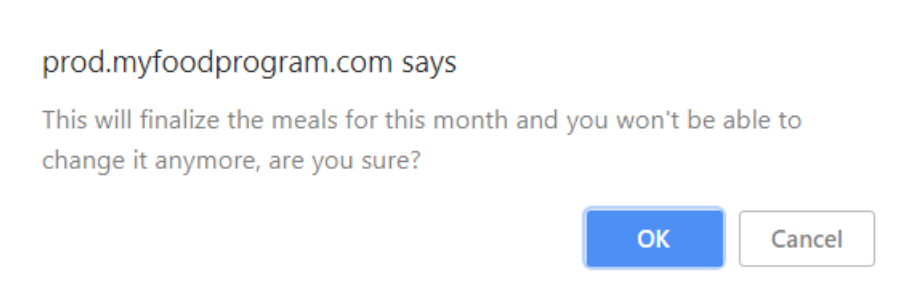
- The system will not run through the validation process. Depending on the size of the site and the way the Site Details are configured, this may take several minutes.
- When claim submission is complete, the "Submit to Sponsor" button disappears. In addition, the site can no longer change menus or alter meal count or attendance records.

Process Claim

NOTE: the dashboard icon "Review Disallowed Meals" is called "Submit to Sponsor" if logged in as a site-level user. In addition, site-level users do not have a "Process Claim" dashboard button.

The claims process has five steps:

1. Meal validation ("check for errors") by the site.
2. Review and correction of any errors by the site.
3. Submission to sponsor by the site.
4. Correction of any errors and meal disallowances by the sponsor.
5. Claims creation by the sponsor.

Once a site has indicated that they have completed the review of their meal counts and attendance for the month, the next step is for the sponsor to complete a second review and also disallow any meals. Any errors that have been identified by My Food Program are listed on the "Review Disallowed Meals" screen. Below is a list of all potential errors and the method used to resolve the errors if it is possible. You may be asking the site for additional documentation in order to clear errors. **Sponsors must not resolve errors unless they are genuine, have documentation and a logical explanation. If errors are true violations of SFSP rules and not incorrect input, the corresponding meals will be disallowed in the claims creation process.**

#	ERROR	HOW IT GETS TRIGGERED	HOW TO GET DETAILS	WHAT TO DO NEXT
1	Meals/snacks claimed outside of the operating days.	A meal count is entered for a meal or snack that is not on a day that the facility is open. **NOTE:** this can only occur if site days of operation are changed in Site Details after a meal count is entered.	Disallowed Meals Report will list the meal(s) and/or snack(s) that were recorded and are now outside the operating days.	Verify the days and meals that the facility is open under "Site Details". Remove or disallow the meal/snack counts for the days that are outside of operating days.
2	Meals/snacks claimed outside of the operating hours.	A meal count is entered for a meal or snack that is during a time that the facility is not open. NOTE: this can only occur if site times of operation are changed in Site Details after a meal count is entered.	Disallowed Meals Report will list the meal(s) and/or snack(s) that were recorded and are now outside the operating times.	Verify the times and meals that the facility is open. If accurate, meals must remain disallowed. Remove or disallow the meal/snack counts that are outside of operating hours.

#	ERROR	HOW IT GETS TRIGGERED	HOW TO GET DETAILS	WHAT TO DO NEXT
3	Meals which do not meet the USDA meal pattern requirements.	Site Details are configured to validate menus AND a meal or snack does not meet the meal pattern requirements.	Disallowed Meals Report will list the meal(s) or snack(s) that are not creditable.	Verify that the meal or snack menu to accurate as to what components were served. If so, meals must remain disallowed. If you are using another system to track menus: Change Site Details configuration to "Ignore meal validation".
4	Meals claimed that differ from those recorded by the field monitor at the time of the visit.	A meal recorded by a site differs from the meal recorded by a monitor.	Disallowed Meals Report will list the meal or snack that is a mis-match. Visits will have details about the menu recorded by the monitor while the Menus section will have the menu recorded by the site.	Revise the site menu to match that recorded by the field monitor. This is most likely related to specific callouts on units or product numbers. Ex: Blueberries, fresh, lbs VS Blueberries, cups.
5	Meals for which there are no menus.	Site Details are configured to enforce meal validation AND a meal count has been entered for a meal or snack and no menu was entered.	Disallowed Meals Report will list the meal(s) and snack(s) without menus.	Delete or disallow the meal counts. Add a creditable menu that matches what was actually served. If you are using another system to track menus: Change Site Details configuration to "Ignore meal validation".

NOTE: the dashboard icon "Review Disallowed Meals" is called "Submit to Sponsor" if logged in as a site-level user. In addition, site-level users do not have a "Process Claim" dashboard button.

The claims process has five steps:

1. Meal validation ("check for errors") by the site.
2. Review and correction of any errors by the site.
3. Submission to sponsor by the site.
4. Correction of any errors and meal disallowances by the sponsor.
5. Claims creation by the sponsor.

Note: the instructions below are for creating a claim for an individual site. If you wish to process claims for multiple sites under the same sponsorship, this is more efficiently done using the Sponsor-level "Claims" tab. See separate instructions for details.

To create a claim:

• Click on "Process Claim" from the main dashboard.
• Select the correct month and year from the drop-down menu.
• Click "Create Claim".
• My Food Program will now go through the meal validation process. Depending on the size and configuration of the site, this may take several minutes.
• When the claim is finished, you will be directed to the claim screen with a summary of payable meals.

Claim

Claim Date:	July 2017
Site Identification:	TESTCENTER1
Early Snack Count:	0
Breakfast Count:	60
AM Snack Count:	71
Lunch Count:	128
PM Snack Count:	64
Supper Count:	0
Evening Snack Count:	0

Rollback Claim

• More details on a claim is available in the Report section. See separate instructions for details.

Claims can be rolled back in My Food Program, but this feature should be used with great care as no record of the claim will be retained. **If a claim has already been submitted to the state agency for reimbursement, then we strongly recommending printing or saving the following reports to substantiate the original claim prior to rolling back the claim:**

1. Additional Meal Counts Report
2. Claim Summary Report

Common reasons to roll back a claim include:

- Receiving household income eligibility forms or enrollment forms for the prior month that should be included in the claim.
- Receiving additional paperwork to substantiate a claim or provide reason to disallow meals.

To roll back a claim:

- Click on "Process Claim" on the main dashboard.
- Select the correct month/year from the drop down.
- Click on the red "Rollback Claim" button.
- Click "OK" when the system prompts you to confirm.
- The claim is now rolled back and the meals are set to new. Menus, meal counts, income forms, enrollment forms and other data can now be changed. To re-create a claim, start-over at step 1 of the claims process.

Reports

The Disallowed Meals Report is a list of the meals that were not included in the claim for a calendar month. Includes the date, meal type, participant) and the reason for the disallow. **The Disallowed Meals Report changes every time you "Check for Errors".** If you are referencing this report to understand claims errors, be sure that you have clicked "Check for Errors" immediately before viewing this report.

To run the report, make your selection and click the green "Run Report" button. A hyperlink will appear called "Download Report". Click the hyperlink to download or view the report.

Date Served	Meal	Status	Error	Participant
			08/19/2018	
03/23/2018	Breakfast	DISALLOWED	Meals for which there are no menus	
03/26/2018	Breakfast	DISALLOWED	Meals for which there are no menus	
03/26/2018	Lunch	DISALLOWED	Meals for which there are no menus	
03/26/2018	Lunch	DISALLOWED	Meal total count greater than number of participants.	
03/27/2018	Breakfast	DISALLOWED	Meals for which there are no menus	

08/19/2018	Number of DISALLOWED meals: 5	Cost of DISALLOWED Meals: $11.71	Page 1 of 1

Features of the Disallowed Meals Report:
1. Date Served
2. Meal
3. Status: there are two status options. "Disallowed" means that there was an error or a sponsor disallow. "Not Payable" means that the number of meals/snacks that a child was checked in for exceeds the daily claim limit.
4. Error: this will list one of the 18 potential errors. For information on how the errors are generated, see the separate instructions.
5. In the footer of the report are two pieces of important information:
   a. The number of disallowed meals. **Note:** this does not include the "not payable" meals that were due to the claim limit.
   b. The cost of the disallowed meals: this can encourage the site to increase compliance with the CACFP regulations in order to maximize their reimbursement.

The Zero Meal Count Report lists dates and meals where no meals have been entered. This is especially helpful for sponsors that provide meals and snacks to sites and retain more than 15% of the reimbursement.

The only selection required for the Zero Meal Count Report is the date range.

To run the report, make your selection and click the green "Run Report" button. A hyperlink will appear called "Download Report". Click the hyperlink to download or view the report.

Summer Program — Zero Meal Count Report

09/17/2018 - 09/22/2018

Date	Meal	Roster
09/17/2018	Lunch	Unassigned
09/17/2018	PM Snack	Unassigned
09/18/2018	Lunch	Unassigned
09/18/2018	PM Snack	Unassigned
09/19/2018	Lunch	Unassigned
09/19/2018	PM Snack	Unassigned
09/20/2018	Lunch	Unassigned
09/20/2018	PM Snack	Unassigned
09/21/2018	Lunch	Unassigned
09/21/2018	PM Snack	Unassigned

The Claim Summary Report provides the information needed for sponsors to enter claims for reimbursement.

Choose the month/year and click the green Run Report button. Click the download report link to view the report.

Summer Program

Claim Summary
Summer Food

June 2018

Meal	Count	x	Amount	=	Total
Breakfast count	0	x	$ 2.19	=	$ 0.00
(Early + AM + PM + Evening Snacks) count	360	x	$ 0.91	=	$ 327.60
Lunch/Supper count	1794	x	$ 3.86	=	$ 6920.35

	TOTAL CLAIM ESTIMATE	=	$ 7247.95
Admin Funds: $ 1087.19	Food Service Funds: $ 6160.76		

Created on: 09/22/2018 · Page 1 of 1

The food temperature report compiles all the food temperature data entered for each meal and date into a single report.

To run the Food Temperature Report, select the month and year and click the green "Run Report" button. Click the hyperlink to download the report.

The additional meal counts report provides a summary of the meal counts entered during a month in all categories.

To run the report, enter the beginning and end date in the date range picker. Click the green "Run Report" button and then click on the hyperlink to download the report.

Breakfast	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Meals Received/Prepared	167	169	173	167	146	166	36	39	222	223	218	202	220	222	224	223	222	224	219	218	0	0	188	188	190	187	187	192	189	189	187
Meals Available from Previous	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Meal Count	71	68	68	68	57	68	19	19	107	107	107	96	107	107	107	107	107	107	108	108	0	0	85	85	85	85	85	85	85	85	85
Second Meal Served to Children	31	34	33	34	27	30	7	8	52	52	50	48	52	51	52	52	51	53	51	50	0	0	40	43	42	40	42	40	43	43	41
Meals Served to Program Adults	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Meals Served to non-Program	38	38	38	38	35	38	3	3	38	38	38	35	38	38	38	38	38	38	38	38	0	0	38	38	38	38	38	38	38	38	38
Non-reimbursable meals	21	20	20	20	20	20	4	4	17	17	17	17	17	17	17	17	17	17	17	17	0	0	15	15	15	15	15	15	15	15	15
Leftover meals	6	9	14	7	7	10	3	5	8	9	6	6	6	9	10	9	9	9	5	5	0	0	10	7	10	9	7	14	8	8	8
Number of additional children	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

	Total
Meals Received/Prepared	5397
Meals Available from Previous	0
Total Meal Count	2478
Second Meal Served to Children	1192
Meals Served to Program Adults	0
Meals Served to non-Program	1026
Non-reimbursable meals	468
Leftover meals	233
Number of additional children	0

This report is used to track training for site staff. It has a custom date range picker and displays columns with staff name, role, a description of the training and the date of training. The information in this report is linked to information entered into the training details on the staff page.

To run the report, make your selection for the date rage and click the green "Run Report" button. A hyperlink will appear called "Download Report". Click the hyperlink to download or view the report.

Summer Program

Staff Training Report

09/22/2018

Name	Role	Description	Date
Summer Kitchen	Kitchen Staff	No Description	06/01/2018
Summer Manager	Site Manager/Director	No Description	08/01/2018
Summer Staff	Staff	No Description	06/01/2018

This report is used to track My Food Program users that are associated with this site. It has a custom date range picker and displays columns with staff name, status, role, start date and end date.

To run the report, make your selection for the date rage and click the green "Run Report" button. A hyperlink will appear called "Download Report". Click the hyperlink to download or view the report.

Summer Program		Staff Active Report		
			09/22/2018	
Name	**Status**	**Role**	**Start Date**	**End Date**
Summer Kitchen	Active	Kitchen Staff	Date not set	Date not set
Summer Manager	Active	Site Manager/Director	Date not set	Date not set
Summer Staff	Active	Staff	Date not set	Date not set

This report is used by sponsors that include staff time in the expense records to demonstrate a nonprofit meal service. Individual staff users need to log their hours for this report to generate data. See separate instructions for details.

To run the report, make your selection for the date rage and click the green "Run Report" button. A hyperlink will appear called "Download Report". Click the hyperlink to download or view the report.

Summer Program — User Hours Detail Report

06/01/2018 to 09/21/2018

Staff	Date	Total Hours	CACFP Direct Labor Hours	Labor Costs	CACFP Admin Hours	Admin Costs	CACFP Total Costs
Summer Manager	06/01/2018	4.00	4.00	$60.00			
Summer Manager	06/04/2018	4.00	4.00	$60.00			
Summer Manager	06/05/2018	4.00	4.00	$60.00			
Total		12.00	12.00	$180.00			

This report is linked to the information that you enter in the Expense part of My Food Program. It summarizes the information for each IRS Category and is helpful for sponsors in demonstrating nonprofit meal service and for individual site users in preparing their taxes.

The only selection required for the Expenses by IRS Category Report is the month/year.

To run the report, make your selection and click the green "Run Report" button. A hyperlink will appear called "Download Report". Click the hyperlink to download or view the report.

Date	Category	# of Expenses	Category Amount	Applied Amount
07/05/2018	Food (Actual Receipts)	2	167.42	167.42
07/05/2018	Food (Actual Receipts)	1	308.85	308.85
07/12/2018	Food (Actual Receipts)	1	108.03	108.03
07/12/2018	Food (Actual Receipts)	1	54.00	54.00
07/12/2018	Food (Actual Receipts)	1	342.51	342.51
07/19/2018	Food (Actual Receipts)	3	178.23	178.23
07/19/2018	Food (Actual Receipts)	1	59.40	59.40
07/19/2018	Food (Actual Receipts)	1	320.15	320.15
07/26/2018	Food (Actual Receipts)	1	317.78	317.78
07/26/2018	Food (Actual Receipts)	2	183.63	183.63
07/26/2018	Food (Actual Receipts)	1	18.84	18.84
07/27/2018	Food (Actual Receipts)	1	108.03	108.03

This report sums up the costs for each expense type over the period of time selected.

The only selection required for the Expense Summary Report is the date range.

To run the report, make your selection and click the green "Run Report" button. A hyperlink will appear called "Download Report". Click the hyperlink to download or view the report.

	07/01/2018 to 08/20/2018		
Category	Number of Expenses	Category Amount	Applied Amount
Food (Actual Receipts)	16	2166.87	2166.87

This is an output of the food production information entered in the menu screen. It has the date, meal type, actual meal count and the amount prepared for each menu item.

The only selection required for the Food Production Report is the date range.

To run the report, make your selection for the date rage and click the green "Run Report" button. A hyperlink will appear called "Download Report". Click the hyperlink to download or view the report.

This report displays how much milk was served in fluid ounces, cups, half-gallons and gallons per type. Shows totals for day, week, and month.

The only selection required for the Food Production Report is the date range.

To run the report, make your selection for the date rage and click the green "Run Report" button. A hyperlink will appear called "Download Report". Click the hyperlink to download or view the report.

Day	Milk Type		Amount		
07/02/2018	1% Milk for all	52.00 (Fluid Oz)	6.50 (cups / 8oz)	.82 (half-gallons)	0.41 (gallons)
07/02/2018	Milk, whole	24.00 (Fluid Oz)	3.00 (cups / 8oz)	.38 (half-gallons)	0.19 (gallons)
07/03/2018	1% Milk for all	46.00 (Fluid Oz)	5.75 (cups / 8oz)	.72 (half-gallons)	0.36 (gallons)
07/03/2018	Milk, whole	12.00 (Fluid Oz)	1.50 (cups / 8oz)	.18 (half-gallons)	0.09 (gallons)
07/04/2018	1% Milk for all	52.00 (Fluid Oz)	6.50 (cups / 8oz)	.82 (half-gallons)	0.41 (gallons)
07/04/2018	Milk, whole	24.00 (Fluid Oz)	3.00 (cups / 8oz)	.38 (half-gallons)	0.19 (gallons)
07/05/2018	1% Milk for all	38.00 (Fluid Oz)	4.75 (cups / 8oz)	.60 (half-gallons)	0.30 (gallons)
07/05/2018	Milk, whole	12.00 (Fluid Oz)	1.50 (cups / 8oz)	.18 (half-gallons)	0.09 (gallons)
07/06/2018	1% Milk for all	52.00 (Fluid Oz)	6.50 (cups / 8oz)	.82 (half-gallons)	0.41 (gallons)
07/06/2018	Milk, whole	12.00 (Fluid Oz)	1.50 (cups / 8oz)	.18 (half-gallons)	0.09 (gallons)
07/10/2018	1% Milk for all	52.00 (Fluid Oz)	6.50 (cups / 8oz)	.82 (half-gallons)	0.41 (gallons)
07/10/2018	Milk, whole	12.00 (Fluid Oz)	1.50 (cups / 8oz)	.18 (half-gallons)	0.09 (gallons)
07/11/2018	1% Milk for all	40.00 (Fluid Oz)	5.00 (cups / 8oz)	.62 (half-gallons)	0.31 (gallons)
07/11/2018	Milk, whole	20.00 (Fluid Oz)	2.50 (cups / 8oz)	.32 (half-gallons)	0.16 (gallons)
07/12/2018	1% Milk for all	52.00 (Fluid Oz)	6.50 (cups / 8oz)	.82 (half-gallons)	0.41 (gallons)
07/12/2018	Milk, whole	12.00 (Fluid Oz)	1.50 (cups / 8oz)	.18 (half-gallons)	0.09 (gallons)
07/13/2018	1% Milk for all	38.00 (Fluid Oz)	4.75 (cups / 8oz)	.60 (half-gallons)	0.30 (gallons)
07/13/2018	Milk, whole	24.00 (Fluid Oz)	3.00 (cups / 8oz)	.38 (half-gallons)	0.19 (gallons)

Week Range	Milk Type		Amount		
07/01/2018 - 07/07/2018	1% Milk for all	240.00 (Fluid Oz)	30.00 (cups / 8oz)	3.78 (half-gallons)	1.89 (gallons)
07/01/2018 - 07/07/2018	Milk, whole	84.00 (Fluid Oz)	10.50 (cups / 8oz)	1.30 (half-gallons)	0.65 (gallons)
07/08/2018 - 07/14/2018	1% Milk for all	182.00 (Fluid Oz)	22.75 (cups / 8oz)	2.86 (half-gallons)	1.43 (gallons)
07/08/2018 - 07/14/2018	Milk, whole	68.00 (Fluid Oz)	8.50 (cups / 8oz)	1.06 (half-gallons)	0.53 (gallons)
07/15/2018 - 07/21/2018	1% Milk for all	158.00 (Fluid Oz)	19.75 (cups / 8oz)	2.48 (half-gallons)	1.24 (gallons)
07/15/2018 - 07/21/2018	Milk, whole	48.00 (Fluid Oz)	6.00 (cups / 8oz)	.74 (half-gallons)	0.37 (gallons)
07/22/2018 - 07/28/2018	Milk, whole	8.00 (Fluid Oz)	1.00 (cups / 8oz)	.12 (half-gallons)	0.06 (gallons)
07/29/2018 - 08/04/2018	Whole milk for 12-23	64.00 (Fluid Oz)	8.00 (cups / 8oz)	1.00 (half-gallons)	0.50 (gallons)
07/29/2018 - 08/04/2018	1% milk for ages 2+ (in	424.00 (Fluid Oz)	53.00 (cups / 8oz)	6.62 (half-gallons)	3.31 (gallons)

Month	Milk Type		Amount		
07/2018	1% Milk for all	580.00 (Fluid Oz)	72.50 (cups / 8oz)	9.12 (half-gallons)	4.56 (gallons)
07/2018	Milk, whole	208.00 (Fluid Oz)	26.00 (cups / 8oz)	3.22 (half-gallons)	1.61 (gallons)
08/2018	Whole milk for 12-23	64.00 (Fluid Oz)	8.00 (cups / 8oz)	1.00 (half-gallons)	0.50 (gallons)
08/2018	1% milk for ages 2+ (in	424.00 (Fluid Oz)	53.00 (cups / 8oz)	6.62 (half-gallons)	3.31 (gallons)

Visits

Visits:
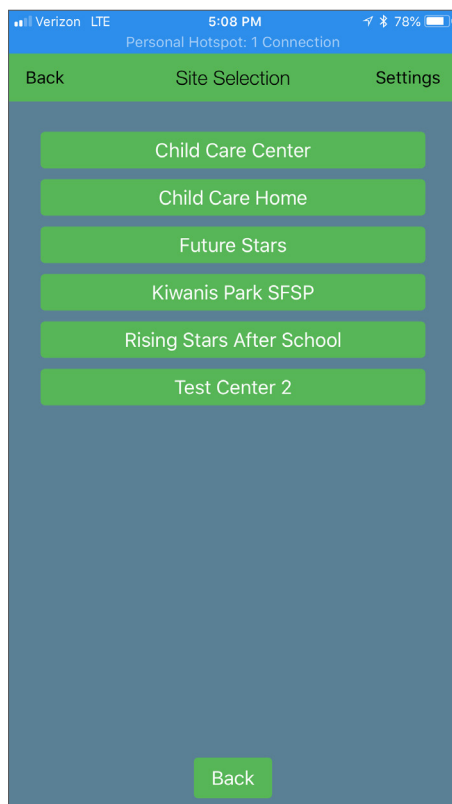## Adding a New Visit using Mobile App

My Food Program has the ability to record and track review/monitoring visits made by sponsors to sites. There are two ways to enter visits:

1. Using the **My Food Program for Reviewers mobile app**.
2. Using a **paper-form and scanning it into My Food Program**.

To add a new review visit using the My Food Program for Reviewers mobile app:

- Download the My Food Program for Reviewers mobile app, available on Google Play, iTunes and the Amazon Appstore.
- Login using the same username and password as for the web app and the meal count app.
- Select the site for the visit.

MY
FOO PROGRAM

- Select the name of the review form you are going to use. **Note:** we are able to input any custom form you want! Just send us the form in any version you have available (word, PDF, etc.) and we can mimic the same form in My Food Program! This is no additional charge for sponsors.
- Proceed through each section, answering questions as you go.

▪▫ Verizon LTE 5:08 PM ⌖ ✻ 78% ▭	▪▫ Verizon LTE 5:09 PM ⌖ ✻ 77% ▭

Left phone screen:

Personal Hotspot: 1 Connection

Back Generic Audit Form
Child Care Center

Visit Information

Records

Civil Rights

Portion Sizes

Meal Service

Special Diets

Menus

Food Production

Infants

Food Safety

Vended Meals

Save to Device

Submit Form

Right phone screen:

Personal Hotspot: 1 Connection

Back Visit Information
Child Care Center

1. Monitor's Name	Monitor
2. Date	08/20/2018
3. Time In	03:00
4. Time out	05:09
5. Visit Type	Scheduled Visit
	Unannounced Visit
6. Meals/ snacks are	catered
7. Meal Served	Breakfast
	AM Snack
	Lunch
	PM Snack
	Supper
	Evening Snack
8. Food is served	Pre-plated
	Family Style
	Combination
	Cafeteria line

Back

- Save the visit information.
  - ○ If you are in a location without cellular or wifi connection, click the "Save to Device" when you have finished. The app will prompt you about any fields that are blank. When you are again in a location with cellular or wifi coverage, open the app again, select the saved form and then click "Submit Form"
  - ○ If you are in a location with cellular or wifi connection, click the "Submit Form" button to record the visit.
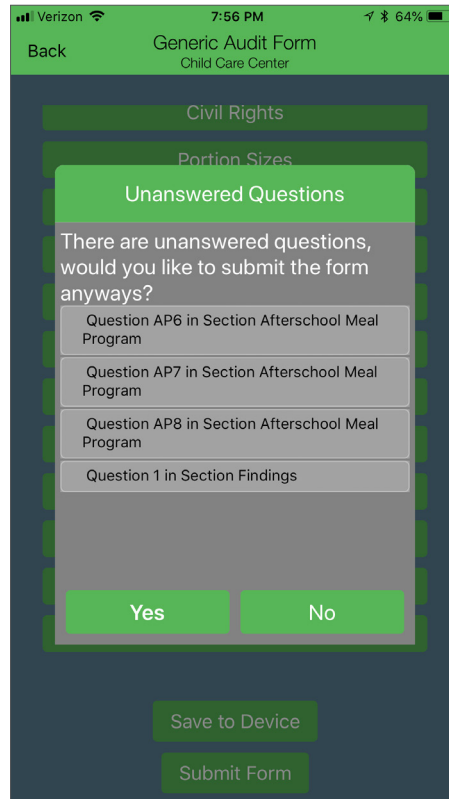
- The visit results are now available for viewing and printing from the web app.
- Once you save a visit, an email is automatically sent to the main sponsor email account as an alert.

To view or print a visit report entered using the mobile app:

- Click on "Visits" on the main dashboard.
- Click on the hyperlink for the date of the visit.
- Click on the hyperlink for the "Audit Report".
- Print directly from your web browser.

Site	Child Care Center
Audit Date	2018-08-20 22:08:35.518
Site Audit Type	Generic Audit Form

	Visit Information	
1	Monitor's Name	Monitor
2	Date	08/20/2018
3	Time In	03:00
4	Time out	05:09
5	Visit Type	Unannounced Visit
6	Meals/snacks are	catered
7	Meal Served	Lunch
8	Food is served	Pre-plated

	Records	Met	Not Met	N/A	Notes
R1	All staff have current CACFP training	X			completed 8/1/18
R2	All children have current enrollment forms	X			
R3	Information about WIC is provided	X			poster in entry
R4	Information on CACFP is provided "Building for the Future"	X			
R5	Facility license is current	X			

My Food Program has the ability to record and track review/monitoring visits made by sponsors to sites. There are two ways to enter visits:

1. Using the **My Food Program for Reviewers mobile app**.
2. Using a **paper-form and scanning it into My Food Program**.

To add a new review visit using the web app:

- Click on "Visits" on the main dashboard.
- Click the blue "Add Visit" in the upper-right corner.
- Enter the fields:
  - **Visit Date (required)**
  - Type: Select from:
    - 28-day follow-up
    - Regular monitoring
    - CAP follow-up
    - Other
    - Site audit
  - Vist Announced: check if the site was notified of the visit ahead of time.
  - Upload Visit Form: click "browse" and select the scan of the paper form.
- Upload any photographs you would like stored with the visit form.
- Click "Save".
- Once you save a visit, an email is automatically sent to the main sponsor email account as an alert.

Visits:
Viewing and Deleting Visits

My Food Program has the ability to record and track review/monitoring visits made by sponsors to sites. There are two ways to enter visits:

1. Using the **My Food Program for Reviewers mobile app**.
2. Using a **paper-form and scanning it into My Food Program**.

To view a visit using the web app:

- Click on "Visits" on the main dashboard.
- Click the blue hyperlink for the visit date.
- View the form:
  - If the visit was added using the mobile app, click on the blue "Audit Report" hyperlink at the bottom of the screen.
  - If the visit was added using the web app, click on the blue "View Document" hyperlink at the top of the screen next to Current Form.

To delete a visit using the web app:

- Click on "Visits" on the main dashboard.
- Click the red "Delete" button next to the correct visit. Note: this action cannot be reversed, so please use this feature with care.
- Confirm that you wish to proceed with the deletion.