

## Process Claim: Claims Step 5: Processing Claims for Individual Sites with Batches

**NOTE:** the dashboard icon “Review Disallowed Meals” is called “Check for Errors or 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:

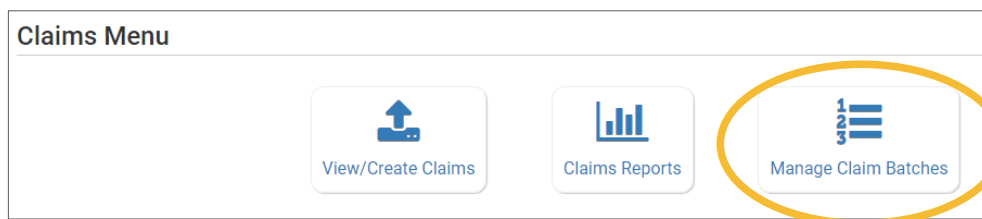
1. Meal validation (“check for errors”) by the site.
2. Review and correction of any errors by the site.
3. Submission to sponsor by the site.
4. Correction of any errors by the sponsor.
5. Claims creation by the sponsor.

**Sponsors can now group their claims into batches in order to track multiple claims submissions to the state agency. To create a claim for an individual site with batches, be sure to turn on batch claiming in Sponsor Setup.**

On a monthly basis, running claims in batches has two steps:

### Step 1: Name your claim batches.

- On the sponsor dashboard, click “Claims” and then “Manage Claim Batches”.



- On the next screen you can name the Claim Batch (you can use a simple 1, 2, 3 system or you can use a date or any other batch naming convention you would like!) and also designate the date that the batch is being submitted to the state and the date your centers or providers can expect payment.

Claim Date*	05/01/2020
Batch Name*	May 2020 Batch 1
Submit to State Date	06/05/2020
Expected Payment Date	06/11/2020

### Step 2: Assign each claim to a batch.

- When you run claims, you will be prompted to assign each claim to a batch.

April 2020	Select Batch	Create Claim
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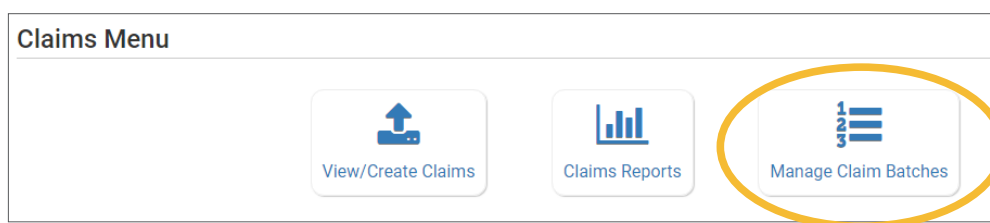
## Process Claim: Claims Step 5: Processing Claims for All Sites with Batches

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

**Sponsors can now group their claims into batches in order to track multiple claims submissions to the state agency. To run claims in bulk with batches, be sure to turn on batch claiming in Sponsor Setup.**

On a monthly basis, running claims in batches has two steps: **Step 1: Name your claim batches.**

- On the sponsor dashboard, click “Claims” and then “Manage Claim Batches”.



- On the next screen you can name the Claim Batch (you can use a simple 1, 2, 3 system or you can use a date or any other batch naming convention you would like!) and also designate the date that the batch is being submitted to the state and the date your centers or providers can expect payment.

Claim Date*	05/01/2020
Batch Name*	May 2020 Batch 1
Submit to State Date	06/05/2020
Expected Payment Date	06/11/2020

### Step 2: Assign claims to a batch.

- Next, return to the main sponsor dashboard and click on “Claims” and “View/Create Claims”.
- Select the month/year for claims processing and then select the batch.
- Click the green “Create Claims” button. The claims creation process may take several minutes depending on the size of the sites and their configuration. A progress bar will appear to track which claim is currently processing and how many claims are left. Any user that visits the page, will get the same update!



- 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.

## Process Claim: Claims Step 5: Processing Claims for All Sites with Batches



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

Claims									
		05/01/2020		Select Batch		Create Claims		Export as .csv	
Site Name	Site Type	Att & Meal		Claim		ARAM	SFSP		
		Counts	Site Submitted to Sponsor	Errors	CACFP Claim	Claim	Claim	Batch	
Adult Day Center	Adult Day Care								
Child Care Center	Child Care Center		05/30/2020 11:40 AM		05/30/2020 11:40 AM				1
Child Care Home	Family Child Care Home								
Safe Harbor Shelter	Emergency Shelter								
Test Center 2	Child Care Center		05/30/2020 08:07 PM						

Each active site is listed on the screen along with the status of their claim:

- Attendance & Meal Counts
  - Red** if no attendance or meal counts have been entered for the month
  - Green** if attendance and meal counts have been entered for the month
  - M symbol** if it is a manual claim site
- Site Submitted to Sponsor
  - Red** if the site still needs to submit their attendance and meal counts to sponsor
  - Green** if the site has submitted their attendance and meal counts (along with date/time stamp)
  - M symbol** if it is a manual claim
- Claim Errors
  - Red** if there are claim errors
  - Green** if no claim claim error
- Claims (CACFP, ARAM and SFSP) have a date/time stamp if a claim has been created
- Batch specifies which batch a claim is assigned to.

## Process Claim: Claims Step 5: Processing Claims for Individual Sites without Batches



**NOTE:** the dashboard icon “Review Disallowed Meals” is called “Check for Errors or 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 by the sponsor.
5. Claims creation by the sponsor.

### To create a claim for an individual site:

- 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.

# Process Claim: Claims Step 5: Processing Claims for All Sites without Batches



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

## 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. A progress bar will appear to track which claim is currently processing and how many claims are left. Any user that visits the page, will get the same update!



- 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.

TEST SPONSOR		Welcome TestSponsorAdmin Logout					
Setup	Licensing	Users	Sites	Claims	Reports		
Claims				01/01/2020	Create Claims		
Site Name	Site Type	Att & Meal Counts		Site Submitted to Sponsor	Claim		SFSP Claim
Adult Day Center	Adult Day Care	<span style="color: green;">✔</span>	<span style="color: red;">✘</span>		<span style="color: green;">✔</span>		
Child Care Center	Child Care Center	<span style="color: green;">✔</span>	<span style="color: green;">✔</span>	02/17/2020 10:37 AM	<span style="color: green;">✔</span>	02/17/2020 10:37 AM	
Child Care Home	Family Child Care Home	<span style="color: brown;">M</span>	<span style="color: brown;">M</span>	<span style="color: brown;">M</span>	<span style="color: green;">✔</span>	02/10/2020 10:53 AM	
Rising Stars After School	After School Program	<span style="color: green;">✔</span>	<span style="color: green;">✔</span>	03/04/2020 05:39 PM	<span style="color: red;">✘</span>		03/04/2020 05:39 PM
Safe Harbor Shelter	Emergency Shelter	<span style="color: red;">✘</span>			<span style="color: green;">✔</span>		

## Each active site is listed on the screen along with the status of their claim:

- Attendance & Meal Counts
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  - **M symbol** if it is a manual claim
- Claim Errors
  - **Red** if there are claim errors
  - **Green** if no claim claim error
- Claims (CACFP, ARAM and SFSP) have a date/time stamp if a claim has been created