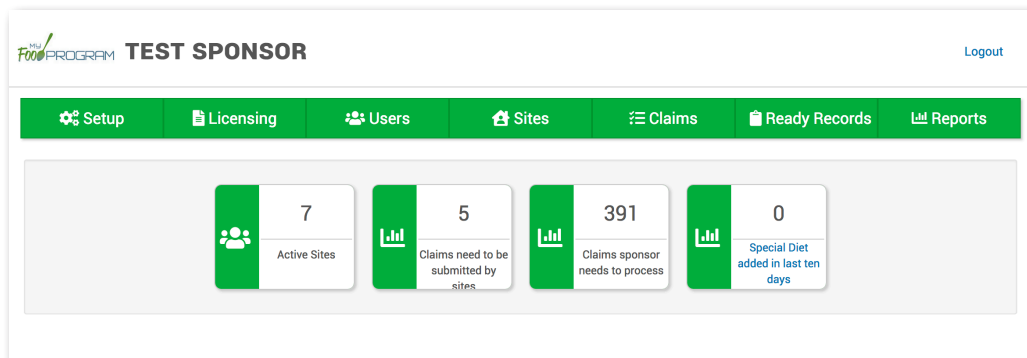




Summer Food Service Program Sponsor Admin: *User Guide*

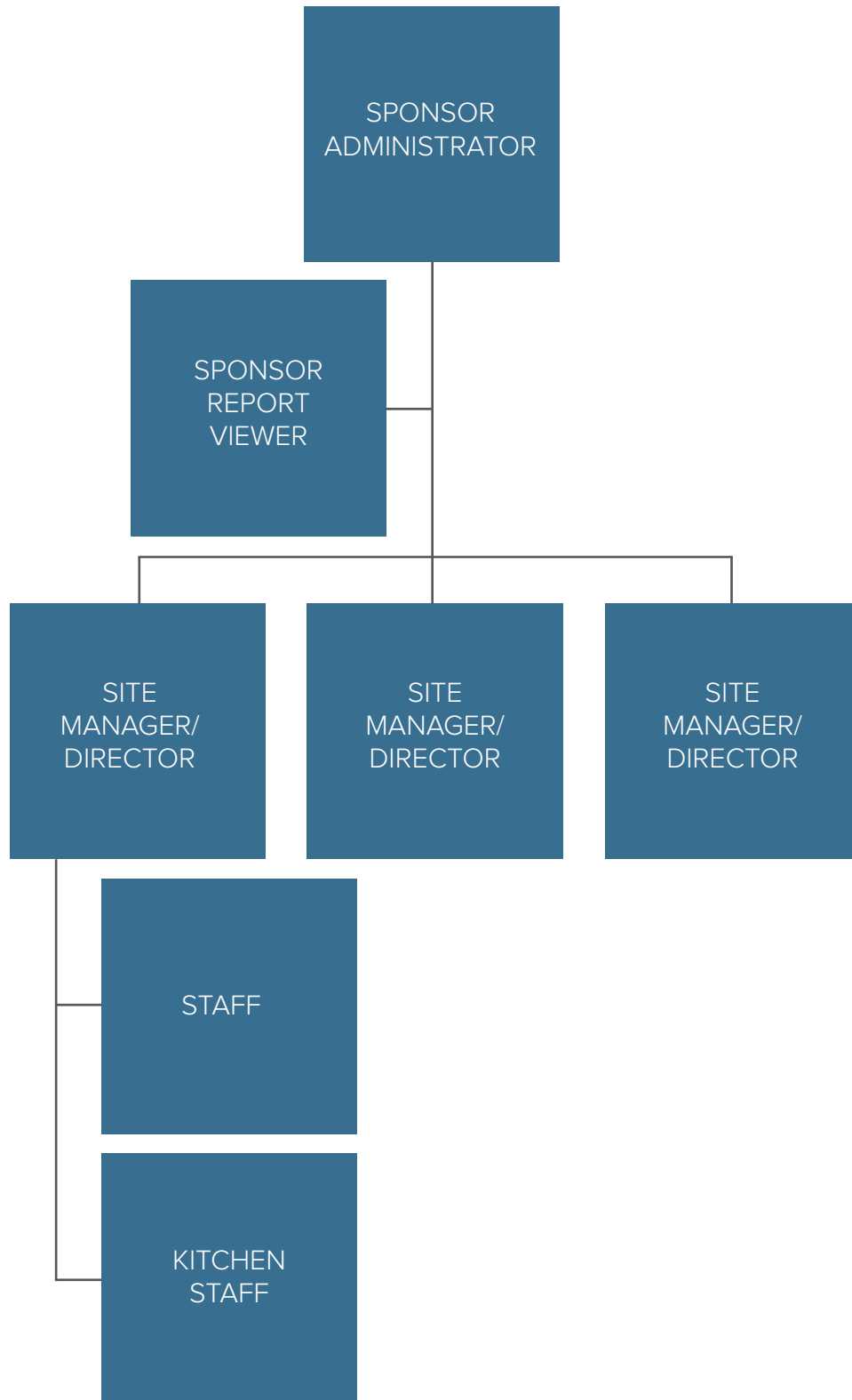
Welcome to My Food Program! This User Guide will help you navigate your way through the My Food Program website. You will find a section for each area of the website which includes instructions for getting up and running. This is meant to be the optimal method of setting up My Food Program. Certain features 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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Sponsor Level

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

All fields below are required:

- Name: the name that you would like to appear on all forms
- Legal Name
- Sponsor Identification Number: typically assigned by the state agency
- Status: active/inactive
- Address, City, State, ZIP
- Email Address: this is the primary email contact for the sponsorship
- Phone
- Allow Sites to Override Disallow for Meals Not Listed on Participant Enrollment Form by Checking "Meal Outside of Schedule" and Providing a Reason (Child Care Centers and Family Day Care Homes Only).
- Allow site level users to create and edit Infant Meal Notifications
- Allow site level users to create and edit Infant Development Readiness Dates
- Allow site level users to create and edit Special Diets
- Restrict Site Level Users from adding Participants
- Allow Site-Level users to enter expenses: select here if you enter all expenses to document a nonprofit meal service or if another method is used for tracking expenses.
- Show Description for Print View: if this is unchecked the printed menus will always be a list of food items on the menu and cannot be over-ridden by the user. Providers or Centers can still add Menu Notes to supplement the food item list if needed.
- Disallow Meals Not Listed on Participant Enrollment Form (Child Care Centers and Family Day Care Homes Only).
- Allow site level users to create Summer/School Closures
- Require parent/guardian name, contact information, schedule and race and ethnicity information for participants: All sites are required to enter first name, last name, birthdate and start date. By checking here, sponsor can ALSO require child care centers, family child care homes and adult day care programs to enter this information as well. Additional information is not required for after school programs or emergency shelters.
- Batch Claims: select here if you would like to process your claims in batches.
- Allow Participant Status "Pending": select here if you want to have Pending as an option for participant status.
- Allow Participant Status "Incomplete": select here if you want to have Incomplete as an option for participant status.
- Apply electronic signature to meal count forms after claim is submitted
- Only enrollment form included in Participant Registration download
- Hide portion size reminders on menu page: select here for a simplified screen when entering menus.
- Site Users Allowed to Edit and Create Rosters: select here to allow your site users to create and edit rosters.
- Licensed Capacity Method: select Age Range OR License Types.

- FRP Classification: select from these options:
 - Include any participant that attended at least once during the month
 - Include any participant that attended at least once during the month AND had an enrollment form that was valid for at least one day in the month
 - Include any participant that ate a meal or snack at least once during the month
 - Include any participant that ate a meal or snack at least once during the month AND had an enrollment form that was valid for at least one day in the month
 - Include any participant that had an enrollment form that was valid for at least one day in the month (it doesn't matter if the participant attended or ate a meal or snack during the month)
- Enrollment Form Effective Date Policy: select from these options:
 - First day of calendar month in which the form was signed by the parent
 - First day of calendar month in which the form was signed by the sponsor
 - Parent signature date
 - Sponsor signature date
- Enrollment Form Expiration Date Policy: select from these options:
 - One year from effective date
 - One day prior to one year from effective date
 - End of the month one year from effective date
 - End of the prior month one year from effective date
 - Specific date
- Income Eligibility Form Effective Date Policy: select from these options:
 - First day of calendar month in which the form was signed by the parent
 - First day of calendar month in which the form was signed by the sponsor
- Income Eligibility Form Expiration Date Policy: select from these options:
 - 12 months
 - 13 months
 - Specific date
- Receipt Totals Policy: select Required OR Optional.
- Food Shortage Policy: select from these options (does not apply to Family Child Care Homes):
 - Do not disallow for food shortages
 - Disallow for food shortages and allow editing of FPR in the past
 - Disallow for food shortages and do not allow editing of FPR in the past
- Default age for infant developmental readiness for solid foods: select the default date for infant developmental readiness for solid foods. The system defaults to setting developmental readiness at 6 months, but sponsors can also select to set it at 7, 8, 9, 10 or 11 months. When the default age is set, the boxes for infant developmental readiness for solid foods on the Participant screen are filled in for newly-enrolled children.
- Logo: 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.
- Allowed Meal Types: 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.

- Allowed Expense Categories: sponsors have the ability to restrict users to specific expense categories. Check the expenses that are allowed and those will be the only ones that will appear for selection at the site level.

Expense categories are now sorted into five different groups:

- Operating (Child Care Center, Adult Day Care, After School, Emergency Shelter, and Summer Food)
 - Allowable Non-Food Supplies
 - Facilities and Space Costs - Operational
 - Food (Actual Receipts)
 - Food Costs (Contracted and Store Purchases)
 - Food Service Equipment
 - Food Service Salaries and Benefits
 - Labor and Benefits
 - Laundry and Cleaning
 - Milk
 - Operations Labor
 - Other
 - Training - Operational
 - Vended Meals
- Administrative (Child Care Center, Adult Day Care, After School, Emergency Shelter, and Summer Food)

NOTE: only self-sponsored sites have administrative expenses contribute toward their nonprofit food service account.

 - Administrative Salaries and Benefits
 - Facilities and Space Costs - Admin
 - Non-Allowable Expenses Included on Receipt
 - Other Administrative Expenses
 - Overhead
 - Training and Dues
 - Travel/Meals/Entertainment
- FDCH Schedule C (Family Day Care Homes)
 - Advertising
 - Business Reports and Maintenance
 - Car and Truck Expenses use Mileage Log
 - Family Daycare Liability Insurance
 - Food Purchases
 - Household Supplies
 - Legal and Professional Services
 - Office Supplies/Postage/Bank Charges
 - Other Schedule C
 - Program Supplies
 - Taxes and Licenses
 - Toys and Equipment
 - Travel Expenses
 - Wages

- FDCH Form 8829 (Family Day Care Homes)
 - General Home repairs and Maintenance
 - Homeowners Insurance
 - Other House Expenses
 - Real Estate Taxes
 - Rent or Interest on Mortgage
 - Utilities
- FDCH Form 4562 (Family Day Care Homes)
 - Equipment Purchases over \$2,500
 - Furniture or Appliance Purchases over \$2,500
 - Home Improvements over \$2,500
- Payment Integration: select Quickbooks from the drop-down menu in order to use Quickbooks to pay your sites.
- Milk Audit Settings: sponsors can customize the following:
 - Milk Audit Units: select from cups OR gallons.
 - Calculation Method: select Calculated from Attendance and/or Food Production Amounts
 - Milk Audit Type: select By Day and/or By Month
 - Milk Audit Delete Permission: select Sponsor Only OR Both Site Staff and Sponsor
 - Milk Audit Manual Increases: select Opening Balance and/or Purchase
 - Milk Audit Manual Decreases: select Additional Servings and/or Spoilage/Waste
 - Milk Audit Requirement: select from: Milk audit not required before claim OR Milk audit required before claim but do not adjust claim for underserved milk OR Milk audit required before claim and adjust claim if milk is underserved. If the last one is selected, you will have the following additional options:
 - Disallow for Under-Served Milk: select Adjust claim by a percentage of meals & snacks OR Adjust claim to account for a specific amount of underserved milk OR Adjust claim to remove specific meals and snacks based on milk receipt dates.
 - Leeway Percentage: the threshold set by the state agency that triggers a claim adjustment for a milk shortage. If the amount by which the site is short on milk is under the Leeway Percentage, then no claim adjustments are made.

The following fields are optional and/or not relevant for this site type:

- Manage Enrollment And Income Form Reminder Emails: only relevant for sponsors that are using Ready Records. Please see the Ready Records training guides for more details.
- Hot Meal Minimum Temperatures: for sponsors that need to disallow meals based on temperature range.
Cold Meal Maximum Temperatures: for sponsors that need to disallow meals based on temperature range.

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	<input type="text"/>
Position	<input type="text"/>
Birthdate	<input type="text"/>
Term Dates	<input type="text"/>
Address	<input type="text"/>
Email	<input type="text"/>
Employer Name	<input type="text"/>
Job Title at Employer	<input type="text"/>
Conflicts of Interest	<input type="text"/>

☐ Voting Member of Board
☐ Compensation For Serving

Save

ARAM Release Days:

You can ignore this button, as this is not relevant for this site type.

Sponsors are able to input days that no sites should be able to claim meals.

To add Sponsor Closure days:

- Click on “Setup” from the main sponsor dashboard.
- Click on “Sponsor Closures” button.
- Click the blue “Add” button.
- Complete the fields:
 - **Reason Off Site**: select field trip, closure or holiday.
 - **Date Off Site**
- Click “Save”.

Sponsor Off Site

Reason Off Site

Select

Date Off Site

Save

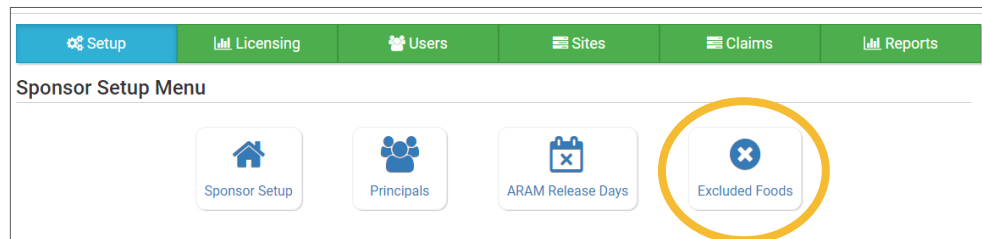
Note: The error message that displays will read “Meals claimed on days that a sponsor is closed”

Excluded Foods:

You have the ability to exclude foods from being included on menus. For example, if your state agency does not allow the breading on chicken nuggets to be counted toward the grain/bread component, you can prevent providers from adding them to their menus. .

To add excluded foods:

- Click on “Setup” from the main sponsor dashboard.
- Click on “Excluded Foods” button.
- Click the blue “Add” button.
- Select the specific foods that you want to exclude.
- Click “Save”.



Note that sponsors are not able to add foods to our database - that is a function available only to My Food Program staff. If you need a food added to our database, please contact us and we will get it added right away.

This page is used to set default settings for newly-created sites and also manage configurations for all existing sites. You can either ensure that all sites have the same configuration or change one of the settings for all sites without needing to go into each site individually. .

To manage site configurations:

- Click on “Setup” from the main sponsor dashboard.
- Click on the “Manage Site Configurations” button.
- On the left column you will see a list of settings for which sponsors can set a default value. See below.
- On the right column users can select from existing sites and apply the same settings. Here is where you can ensure that all sites have the same configuration or change one of the settings for all sites without needing to go into each site individually.
- Be sure to click “Save Configuration for future sites” or “Apply checked fields to selected sites” when finished.

Manage Site Configurations

Configuration to be applied to future new sites

Mark to apply to selected site(s)

Select Site(s) to apply to

Daily Attendance Method	Select	<input type="checkbox"/>
Meal CountTimeFrame	Select	<input type="checkbox"/>
Meal Count Method	Select	<input type="checkbox"/>
Meal Count Entry	Select	<input type="checkbox"/>
Infant Menu Method	By Date	<input type="checkbox"/>
Reimbursement Method	Actual Meal Count by Type	<input type="checkbox"/>
<input type="checkbox"/> Require menus before meal counts		<input type="checkbox"/>
<input type="checkbox"/> Require food production records before meal counts		<input type="checkbox"/>
<input type="checkbox"/> Allow Sites to Download Pre-Filled Participant Registration Forms (income and/or enrollment forms)		<input type="checkbox"/>
<input type="checkbox"/> Hide option for staff to take attendance		<input type="checkbox"/>
<input type="checkbox"/> Enhanced sponsor control of available food items		<input type="checkbox"/>
<input type="checkbox"/> Site can add Staff		<input type="checkbox"/>
<input type="checkbox"/> Ignore menu validation		<input type="checkbox"/>
<input type="checkbox"/> Invoicing Feature		<input type="checkbox"/>
<input type="checkbox"/> Allow meal orders to be entered using the mobile app		<input type="checkbox"/>
<input type="checkbox"/> Hide Check for Errors Button?		<input type="checkbox"/>
<input type="checkbox"/> Hide Submit to Sponsor button?		<input type="checkbox"/>
<input type="checkbox"/> Allow Staff to add Participants on Mobile		<input type="checkbox"/>
<input type="checkbox"/> Do not include ARAM participants in income and enrollment form reminders		<input type="checkbox"/>
Licensing Age Range Errors	Choose	<input type="checkbox"/>
Enrollment Form Errors	Choose	<input type="checkbox"/>
Missing Infant Menu Errors	Choose	<input type="checkbox"/>
Missing Infant Notification Errors	Choose	<input type="checkbox"/>
Facility License Missing/Expired	Choose	<input type="checkbox"/>

Save Configuration for future sites
Apply checked fields to selected sites

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 and enter the fields:
 - **Name (required)**
 - **Username (required)**
 - **Password (required)**: must be at least 12 characters.
 - **Confirm Password (required)**
 - Email Address, Phone Number, Start Date and End Date (optional)
 - Status: active/inactive. A sponsor user marked as inactive will not be able to log in.
 - **Roles (required)**: select “Sponsor Admin” which gives full permission to all sponsor and site-level information or “Sponsor Reporter” which is mostly read-only. You can assign the centers or providers in their sponsorship and you can restrict the monitoring forms available to Sponsor Reporters on the My Food Program for Reviewers Mobile App. For more information, refer to the Permissions Matrix.
 - Notes: for your records.
 - Sign Here: only relevant for sponsors that are using Ready Records. Please see the Ready Records training guides for more details.
- Training: enter training here if you would like to use My Food Program to track training by sponsor staff.

Staff Info

Name

User Name

Password

Confirm Password

Email Address

Phone Number

Start Date

End Date

Status

Active

Roles

☐ Sponsor Admin
 ☒ Sponsor Reports

Specific Sites

Specific Audit Forms

Notes

Sign Here:

Clear Signature

Training

+ Add

Type	Date	Description	Link
<div>Save</div>			

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:
 - **Training Date (required)**
 - **Training Type (required)**
 - Description (optional); for your records.
 - Training Hours; for your records and available on the Staff Training Report.
 - Upload a scan or photo of the training agenda and/or signed training roster (optional).

Sponsor Staff Training	
Training Date	<input type="text"/>
Training Type	<input type="text" value="Select"/>
Description	<input type="text"/>
Training Hours	<input type="text"/>
Upload Training	<input type="button" value="Choose File"/> No file chosen
Current Upload	No Upload
<input type="button" value="Save"/>	

Sponsor: Permissions Matrix



FUNCTION	OWNER OR SPONSOR ADMINS	SPONSOR REPORTER	SITE ADMIN/DIRECTOR	SITE STAFF	KITCHEN STAFF OR INFANT TEACHER
MENUS					
Manage Available Foods	✓				
Create/Edit/Delete Menus	✓		✓		✓
Manage Favorite Foods*	✓		✓		✓
Copy Menus	✓		✓		✓
Print Menus	✓		✓		✓
Create/Edit/Finalize/Delete Food Production Record	✓		✓		✓
Create/Edit/Finalize/Delete Meal Order*	✓		✓		✓
ATTENDANCE AND MEAL COUNTS					
Enter a Meal Count at Point of Service	✓		✓	✓	✓
Edit Meal Counts for a Month without a Claim*	✓		✓		
Allow Sites to Claim Meals Outside of Participant Schedule	✓				
Enter Attendance for the Current Day	✓		✓	✓	✓
Edit Attendance for a Month without a Claim*	✓		✓		
PARTICIPANTS & ROSTERS					
Create/Delete/Inactivate a Roster	✓		✓	✓	✓
Add or Withdraw a Child	✓		✓	✓	✓
Change a Child's Roster or Schedule*	✓		✓	✓	✓
Print an Income or Enrollment Form for the Parent to Sign	✓		✓	✓	✓
Certify Income or Enrollment Forms	✓				
Add an Infant Meal Notification	✓		✓	✓	✓
Designate an Infant as Developmentally Ready for Solid Foods	✓		✓	✓	✓
Indicate that a Child has Special Dietary Needs	✓		✓	✓	✓
Move a Child to a Different Household	✓		✓	✓	✓
Merge Duplicate Children	✓		✓	✓	✓

Sponsor: Permissions Matrix



FUNCTION	OWNER OR SPONSOR ADMINS	SPONSOR REPORTER	SITE ADMIN/DIRECTOR	SITE STAFF	KITCHEN STAFF OR INFANT TEACHER
👤 STAFF/USERS					
Add/Inactivate a New Sponsor-Level User	✓				
Change a Sponsor User Password	✓				
Add/Inactivate a New Site-Level User	✓		✓		
Change a Site-Level Users Password	✓		✓		
Add a Signature to be Applied to Attendance and Meal Count Forms			✓		
🏠 SITE DETAILS					
View Site Details	✓		✓		
Modify Site Settings	✓				
🚌 CLOSURE/FIELD TRIPS					
Record a Closure or Field Trip	✓		✓		
🥛 MILK AUDIT					
Manage Milk Audit Settings	✓				
Create/Edit/Delete a Milk Audit*	✓		✓		✓
🏢 EXPENSES					
Set Expense Categories	✓				
Record Expenses to Demonstrate a Nonprofit Meal Service	✓		✓		✓
Manage Opening and Closing Balances in Nonprofit Meal Service Account	✓				

Sponsor: Permissions Matrix



FUNCTION	OWNER OR SPONSOR ADMINS	SPONSOR REPORTER	SITE ADMIN/DIRECTOR	SITE STAFF	KITCHEN STAFF OR INFANT TEACHER
CLAIMS					
Check for Claim Errors Before Submitting*	✓		✓		
Submit a Claim	✓		✓		
Set a Site's Licensed Capacity	✓				
Designate Days that a School Age Child can be Claimed for Lunch on ARAM	✓				
Manage Claim Batches	✓				
Create or Rollback a Claim	✓				
View a Claim Summary	✓	✓	✓		
REPORTS					
View Reports for a Single Site	✓	✓	✓		✓
View Reports for All Sites	✓				
Record Hours Worked	✓		✓	✓	✓
VISITS					
Add a Review Visit	✓	✓	✓		
View a Review Visit Summary	✓	✓	✓		

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					
<input checked="" type="checkbox"/>	Name	Type/Status	Address	Settings	Errors
<input checked="" type="checkbox"/>	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	
<input checked="" type="checkbox"/>	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	
<input checked="" type="checkbox"/>	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. 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		Claim			SFSP Claim
		Counts	Site Submitted to Sponsor	Errors	CACFP Claim	ARAM Claim	
Adult Day Center	Adult Day Care						
Child Care Center	Child Care Center		02/17/2020 10:37 AM		02/17/2020 10:37 AM		
Child Care Home	Family Child Care Home				02/10/2020 10:53 AM		
Rising Stars After School	After School Program		03/04/2020 05:39 PM			03/04/2020 05:39 PM	
Safe Harbor Shelter	Emergency Shelter						

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

Below is our full list of available reports, separated by the following categories: Attendance & Meal Counts, Claims, Financial, Food Service Operations, Export, Income and Enrollment, and Monitoring and Training. If your state agency requires a specific report, we can develop new reports to meet those requirements. Reach out with any questions.

REPORT NAME	DESCRIPTION	USER SELECTIONS	SAMPLE REPORT
≡ ATTENDANCE & MEAL COUNT REPORTS			
Average Daily Participation Report	This reports shows the average daily participation for meals. Used by Texas sponsors.	Month/Year	
Meal Count and Menu Claim Documentation	Meal counts and menu data for a claim month,	Report Date Active Sites Inactive Sites	
Payable Meals Custom Date Range	Generates a csv file of payable meals by week by tier.	Date Range	
Weekly Meal Count with Attendance by FPR	The Weekly Meal Count Report contains meal counts and attendance for each participant per meal by FRP type for a given week.	Date Separate OR Combined Rosters	
Monthly Meal Count with Attendance Report	Monthly Meal Count with Attendance Report for all sites.	Month/Year All OR Payable Only Meal Type	
Attendance and Meal Counts by Roster	Claim Information Separated By Roster.	Month/Year	
Meals Outside of Schedule	Report of all meals served outside of schedule during a month.	Month/Year	
⬆ CLAIMS REPORTS			
Claim Summary and Disallowed Meals	This report displays the Site Claim Summary and Disallowed Meals Reports for each site.	N/A	
🏛 FINANCIAL REPORTS			
Expense Summary Reports	Expense Summary Report for all sites.	Date Range	
Expense Summary by Center	This report sums the costs for expense categories by center for a selected date range.	Center OR All Date Range	

REPORT NAME	DESCRIPTION	USER SELECTIONS	SAMPLE REPORT
Reimbursements by Calendar Year	Yearly summary of CACFP reimbursement for all sites.	Year	
Nonprofit Status Report	The ending balance for each site for the selected months.	Month/Year	
🍴 FOOD SERVICE OPERATIONS REPORTS			
Site Food Orders	This report displays meal orders by age range for each site.	Date	
Site Menu Report*	Child and Infant menus for every site with a claim. *This report will only include menus for sites that have created a claim for that month.	Month/Year	
Special Diet Report	Special Diet report for one or more sites.	Sites OR All	
📄 EXPORT REPORTS			
Participant Export Report	Generates a csv file of all participant attributes.	Participant Status	
Site Export Report	A spreadsheet that is a comprehensive site export file.	Site Status	
📄 INCOME AND ENROLLMENT REPORTS			
Annual Re-Enrollment	Generates Re-Enrollment form for all active participants for all active sites.	Effective Date AND Expiration Date of Enrollment Renewal	
Bulk Enrollment Form Report	Generates one pdf with a enrollment form for each household for each site.	Missing/Expired Enrollment Forms, Income Forms or Both	
Enrollment Create Date Report	This report displays participants with enrollment forms created within a range.	Date Range	
Expired/Missing HIEF Report	These reports are only relevant for sponsors that are using Ready Records. Please see the Ready Records training guides for more details.		
Pending HIEF Report			
Missing Forms Report	Report of number of missing forms for each site.	N/A	

REPORT NAME	DESCRIPTION	USER SELECTIONS	SAMPLE REPORT
Missing Forms Detail Report	This report lists all missing or expired income/enrollment forms for the selected month.	Month/Year Missing, Expired, Expiring OR All Enrollment OR Income Forms By Site OR Monitor	
Income Certification Address Logging	Logs of all income certification requests.	Date Range	
 MONITORING AND TRAINING REPORTS			
Missing/Expired Training Report	This report displays each user for each site that has missing or expired training.	Current Fiscal Year OR Current Year OR Last 12 Months	
Participants Enrolled in Multiple Sites	Active Participants with the same First Name, Last Name and Birth Date enrolled in multiple sites.	N/A	
Participants with Duplicate Meals in Multiple Sites	Participants with the same First, Last Name and Birthdate that have eaten the same meal at multiple sites.	N/A	
Serious Deficiency Report	This report lists all serious deficiencies for a time period.	Date Range Status	
Monitoring Visits	This report displays each site visit by date for this site.	Date Range	
Site Summary Reports	Site Summary report for one for more sites, Manual and Online Claims.	Claim Type Report Type	
Sponsor Staff Training Report	A spreadsheet of all of the training for all sites between the selected dates.	Date Range	
Site Closures Report	This report displays all site closures for a date range.	Date Range	
Daily Notes Export	A spreadsheet containing all daily notes for each site.	Date Range	
Facility License Report	A list of the facility license numbers, effective dates and expiration dates for all active sites. Facility licenses that are missing, expired or expiring in the next 30 days will be in red text.	Start Date	

REPORT NAME	DESCRIPTION	USER SELECTIONS	SAMPLE REPORT
☰ CLAIMS			
State Agency Export Files	Generate export files for state agencies.	N/A	 
Claim Summary and Disallowed Meals	This report displays the Site Claim Summary and Disallowed Meals Reports for each site.	N/A	
Claims	This report shows the claim summary for selected site types including Child Care Centers, Adult Day Care Centers, Afterschool Programs, Emergency Shelters and Summer Food Service Programs.	Site Type Month/Year	
Claims (Payment Amounts Only)	This report is for sponsors that just want to know the amount of the reimbursement check to be sent to the center. This is a truncated version of our comprehensive Sponsor-Level Claim Summary Report that includes the following fields: <ul style="list-style-type: none"> • Site Identification Number • Site Name • Payment Method • Claim Batch • Claiming Percentage • CACFP Blend Rate Estimate • CACFP Actual Meal Count Claim Estimate • ARAM Claim Estimate 	Site Type Select: "Payment Amounts Only" Month/Year	
Claims (FDCH)	This report shows the claim summary for Family Day Care Homes.	Site Type Month/Year	
Claims (FDCH) (Payment Amounts Only)	This report is for sponsors that just want to know the amount of the reimbursement check to be sent to the family day care home. This is a truncated version of our comprehensive Sponsor-Level Claim Summary Report that includes the following fields: <ul style="list-style-type: none"> • Site Identification Number • Site Name • Payment Method • Claim Batch • CACFP Claim Estimate • Claim Adjustments Date(s) and Amount(s) 	Site Type Select: "Payment Amounts Only" Month/Year	

Menu

The food database only includes creditable foods. If you would like a food added, please send a request to info@myfoodprogram.com. When planning your menus, keep in mind that the software was designed to prevent errors, so you will not be able to save a menu that doesn't credit with the CACFP.

When viewing your menus, you will notice that there are a number of icons used. These are meant to be a visual reference to note the status of your menus. Please see below for more detailed descriptions.



Numbered List

This icon means that a meal count has been entered.



Fork & Knife

This icon means that a menu has been planned. The name of the meal turns green once both a menu and meal count have been entered.



Child

This icon means that an infant menu has been planned.



Food Production Record

This icon means that a food production record has been created for this meal.



Individual Infant Feeding Records

This icon in red means that an infant has been checked in for a meal. Once each infant checked in for a meal has an individual infant feeding record, the icon will turn green.



Site Closures

This icon means that the site was recorded as closed or on a holiday that day.



Juice

This icon means that juice was served that day. The software automatically prevents juice from being served twice in one day.



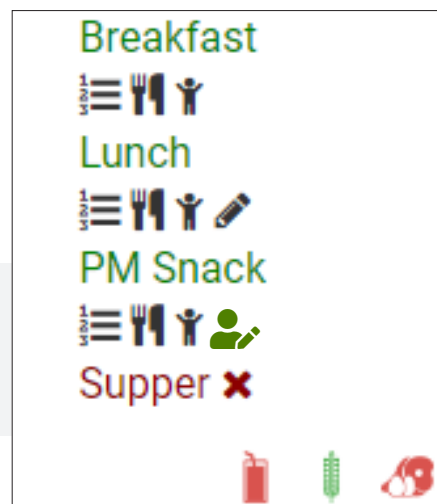
Whole Grain Rich

This icon will be green if you have served a food that is whole grain-rich. If you have not served a food that is whole grain-rich, the icon is grey.



Meat/Meat Alternate

This icon means that a meat/meat alternate was served at breakfast instead of a grain. The software automatically limits those substitutions to three times per week.



To plan a new menu for children ages 1 and older:

- 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.
 - Enter the “Menu Notes”. Note that whatever is entered here will be added to the list of food items and will also appear on the *Child Menu Print Ready Report*.
 - If you wish to use a saved menu, select it from the “Use Saved 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. If your sponsor allows it, you may also search our food database for additional food 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.

Meal Menu

Date
11/03/2020

Meal
Breakfast

Description For Print View

Menu Notes

Use Saved Menu
Select

Requirements

One of each of the following
One whole-grain rich food per day : not met

Category	Portion Size	Favorite Foods	Search Food
1 Fluid Milk	Adjust from one Age-Appropriate Portion	Select	Search... <input type="button" value="Q"/>
1 Fruit and/or Vegetable	Adjust from one Age-Appropriate Portion	Select	Search... <input type="button" value="Q"/>
1 Grains and/or Meat/Meat Alternate	Adjust from one Age-Appropriate Portion	Select	Search... <input type="button" value="Q"/>

Save

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 three options below and begin using the milk type that works best for the requirements in your state.

Option #1: No Milk Audit; No Food Production Records

Your state agency does not require milk audits or food production records.

Favorite Foods

<input checked="" type="checkbox"/>	Whole Milk (1 yr) 1% Milk (2 yrs+), unflavored (in cups)
<input checked="" type="checkbox"/>	Whole Milk (1 yr) Skim Milk (2 yrs+), unflavored (in cups)

Menu Planning:

Select ONE.

Option #2:

Milk Audit; Food Production Record in Cups

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

Fluid Milk Combination: Add whole milk for 1 year olds and either skim milk OR 1% milk for all participants 2 and older.

Favorite Foods

<input checked="" type="checkbox"/>	1% Milk for 2 yrs+ (in cups)
<input checked="" type="checkbox"/>	Skim Milk for 2 yrs+ (in cups)
<input checked="" type="checkbox"/>	Whole Milk for 1 yr olds (in cups)

Menu Planning:

Select BOTH whole milk AND skim or 1% milk.

Option #3:

Milk Audit; Food Production Record in Gallons

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

Fluid Milk Combination: Add whole milk for 1 year olds and either skim milk OR 1% milk for all participants 2 and older.

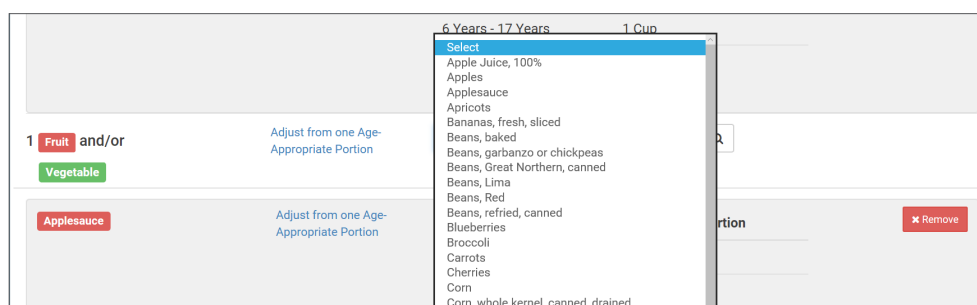
Favorite Foods

<input checked="" type="checkbox"/>	1% Milk for 2 yrs+ (in gallons)
<input checked="" type="checkbox"/>	Skim Milk for 2 yrs+ (in gallons)
<input checked="" type="checkbox"/>	Whole Milk for 1 yr olds (in gallons)

Menu Planning:

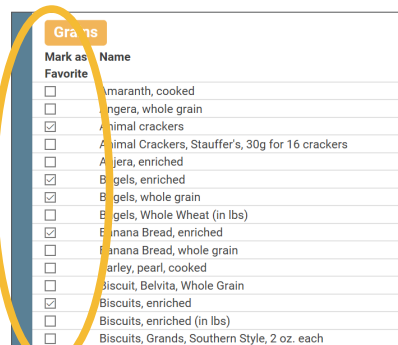
Select BOTH whole milk AND skim or 1% milk.

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.
- This screen is split into two sections with the top list for “Foods for Participants Other than Infants < 12 months” and the bottom list for “Foods for Infants < 12 months”.
- 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”.



Notes:

- By default, all infant foods are designated as favorite foods. If you would like to add another food item to an infant menu you will need to add it to your favorite foods list in order for it to appear in the drop-down menu.

To copy favorite foods from one site to another:

- Once you have all the favorites selected and saved, scroll to the bottom of the screen and select the site from the dropdown menu.
- Click the green “Copy favorite foods” button.

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 “Saved 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.

Home / Menu / Saved Menus / Saved Menu

Saved Menu

Name: Baked Chicken Lunch

Description: Baked Chicken Whole-Grain Bread

Meal Pattern: New Lunch/Supper

- 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.

Baked Chicken Lunch	Baked Chicken Whole-Grain Bread Corn Watermelon Milk	1.00 Bread, whole wheat 1.00 Chicken, cooked 1.00 Corn 1.00 Watermelon 1.00 1% Milk for all participants 2 and older 1.00 Whole milk for ages 12-23 months	New Lunch/Supper	Copy
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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 “Create Saved 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.

Menu: Saved Menus: Create New Saved Menu for Infants

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 for Infants:

- Click on “Menu” from the main dashboard.
- Click on “Saved Menus”.
- Click on the blue “Add Infant 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 a list of the food items, for example “Formula Peaches Infant Cereal” or with the information from a cycle menu plan, for example “Monday Lunch Week 1”.
 - Meal Pattern: this is a required field. Select whether you are planning a breakfast, snack or lunch/supper and if the menu is just for infants 0-5 months or also includes solid foods for ages 6-11 months.
- 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.

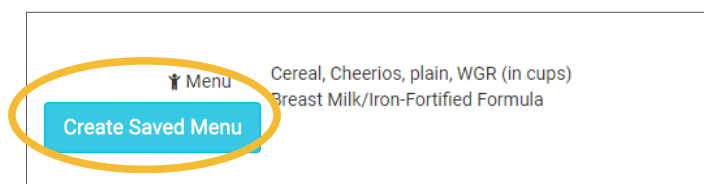
Home / Menu / Saved Menus					
Saved Menus			+ Add Infant Menu + Add Menu		
Name	Name	Food Items	Meal Pattern	Copy	Delete
	Formula Peaches Infant Cereal	1.00 Infant Cereal, Iron-fortified 1.00 Iron-fortified Infant Formula 1.00 Infant Peach Food	Oldest Infant in Care 6-11 Months New Lunch/Supper	Copy	Delete

Menu: Saved Menus: Create New Saved Menu for Infants

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 for Infants:

- 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.
- Click on the blue “Edit Infant Menu” button.
- 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 “Create Saved Menu” button underneath the Menu.



- Make any edits and click “Save”.
- Your new Saved Infant Menu now appears as a choice when completing a daily menu.

Menu: Saved Menus: Modify an Existing Saved 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.

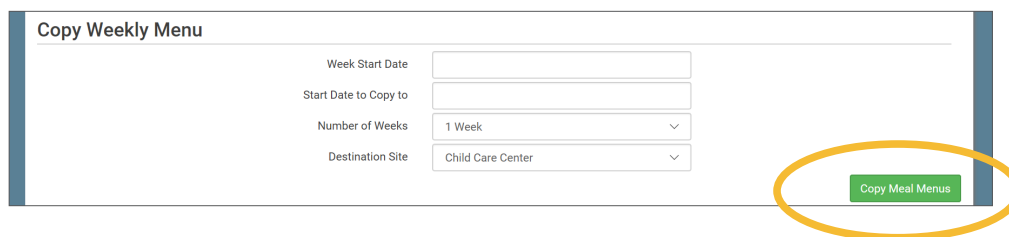


- Make any changes to the saved menu. Note: you need to give each saved menu a unique name. You should not change the Meal Pattern associated with the saved menu.
- Click “Save”.
- Your new saved menu is now available for menu planning.

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”.

A screenshot of the "Copy Weekly Menu" form. It contains four input fields: "Week Start Date", "Start Date to Copy to", "Number of Weeks" (set to "1 Week"), and "Destination Site" (set to "Child Care Center"). A green button labeled "Copy Meal Menus" is circled in orange at the bottom right of the form.

- All fields are required:
 - Week Start Date: 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.**
 - Start Date to Copy to: 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.
 - Number of weeks: 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.
 - Destination Site (**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 as an Excel or PDF file. **Note:** the words that appear in print view are from the “Display Name” field in each day’s menu. If you type text in the *Description for Print View* then the software uses that text instead of the Display Name.

To print a menu:

- Click on “Menu” on the main dashboard.
- Click on the “Print Menus” button at the top of the page.
- Select “Monthly Child Menu Print-Ready”.
 - After you click “Monthly Child Menu Print-Ready” a report will be generated and the page will refresh. Click on “Download Print-Ready Menu” and save the PDF document in your location of choice.

Monthly Child Menu							August 2020
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
26	27 Breakfast: 1% Milk (2 yrs+); Whole Milk (1 yr); Pineapple; Bread WGR Lunch: 1% Milk (2 yrs+); Whole Milk (1 yr); Parmesan or Romano Cheese; Bread WGR; Oranges; Tomatoes; Cucumbers PM Snack: Carrots; Applesauce	28 Breakfast: 1% Milk (2 yrs+); Whole Milk (1 yr); Bread WGR; Mandarin Oranges Lunch: 1% Milk (2 yrs+); Whole Milk (1 yr); Ground Beef; Broccoli; Cantaloupe; Bread WGR PM Snack: Bananas; Bread WGR	29 Breakfast: 1% Milk (2 yrs+); Whole Milk (1 yr); Pears; Eggs; Bread WGR; Cheese Lunch: Ground Beef; Scalloped Potatoes; Corn; Tortillas; 1% Milk (2 yrs+); Whole Milk (1 yr) PM Snack: Ritz Crackers; Watermelon	30 Breakfast: 1% Milk (2 yrs+); Whole Milk (1 yr); Bananas; Waffles Lunch: 1% Milk (2 yrs+); Whole Milk (1 yr); Bread WGR; Ground Beef; Cucumbers; Roasted Potatoes; Cantaloupe PM Snack: Teddy Grahams WGR; Apple Juice (100% Juice)	31 Breakfast: 1% Milk (2 yrs+); Whole Milk (1 yr); Apples; Cheerios WGR Lunch: 1% Milk (2 yrs+); Whole Milk (1 yr); Chicken Nuggets; Tenders or Strips; Bananas; Roasted Potatoes; Bread WGR PM Snack: Animal Crackers; Applesauce; Sun Chips WGR	1	
2	3 Breakfast: 1% Milk (2 yrs+); Whole Milk (1 yr); Whole Milk (1 yr); Cucumbers; Bread WGR Lunch: Whole Milk (1 yr); 1% Milk (2 yrs+); Chicken Nuggets; Tenders or Strips; Cucumbers; Cantaloupe; Bread WGR; Lactose-free 1% Milk PM Snack: Bread WGR; Peanut Butter	4 Breakfast: 1% Milk (2 yrs+); Apples; Cheerios WGR Lunch: 1% Milk (2 yrs+); Whole Milk (1 yr); Chicken Nuggets; Tenders or Strips; Broccoli; Apples; Bread WGR PM Snack: Bread WGR; Peanut Butter	5 Breakfast: Whole Milk (1 yr); 1% Milk (2 yrs+); Bread WGR; Pears Lunch: Chicken; 1% Milk (2 yrs+); Whole Milk (1 yr); Tortillas; Apples; Green Beans PM Snack: Animal Crackers WGR; Cheese	6 Breakfast: Bread WGR; Apples; 1% Milk (2 yrs+); Whole Milk (1 yr) Lunch: Ground Beef; Spaghetti; Mashed Potatoes; Mandarin Oranges; 1% Milk (2 yrs+); Whole Milk (1 yr) PM Snack: Graham Crackers; Bananas; Apple Juice (100% Juice)	7 Breakfast: 1% Milk (2 yrs+); Whole Milk (1 yr); Pinto Beans; Bread WGR Lunch: Hot Dogs; French Fries; Applesauce; Buns WGR; 1% Milk (2 yrs+); Whole Milk (1 yr) PM Snack: Apple Juice (100% Juice); Sun Chips WGR	8	
9	10 Breakfast: Milk; Apple Slices; Toast Lunch: 1% Milk (2 yrs+); Whole Milk (1 yr); Deli Ham; Grapes; Goldfish Crackers; Waffles WGR; Cucumbers PM Snack: Waffles; Bananas	11 Breakfast: Milk; Apple Slices; Cheerios WGR Lunch: 1% Milk (2 yrs+); Whole Milk (1 yr); Beef Ribeye; Corn; Grapes; Bread WGR PM Snack: Celery; Peanut Butter	12 Breakfast: 1% Milk (2 yrs+); Whole Milk (1 yr); Bread WGR; Bananas Lunch: Cheese; Ham; Cucumbers; Apples; Tortillas; 1% Milk (2 yrs+); Whole Milk (1 yr) PM Snack: Peanut Butter; Apples	13 Breakfast: Bananas; Bread WGR; 1% Milk (2 yrs+); Whole Milk (1 yr) Lunch: Ground Beef; Corn; Mandarin Oranges; Tortillas; 1% Milk (2 yrs+); Whole Milk (1 yr) PM Snack: Peanut Butter; Bread WGR	14 Breakfast: Milk; Apple Slices; Toast Lunch: 1% Milk (2 yrs+); Whole Milk (1 yr); Pinto Beans; Pinto Beans; Chicken Drumsticks; Broccoli; Bread WGR PM Snack: Goldfish Crackers; Cheese	15	

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1

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 for a single day:

- Click on Menu on the main dashboard.
- Click on the date and meal that you want to delete.
- Click the red “Delete Menu” button.
- The menu is now deleted and the fork/knife icon disappears from the menu calendar.

← Previous Day

Date04/29/2021

Next Day →

MealBreakfast

Description For Print ViewMilkBananas

Create Saved Menu

Menu Notes

Meal Count5

Food Production5 Cup Oatmeal WGR (in cups)
5 Each Bananas, fresh, regular, 100-120 count (each)
5 Cup 1% Milk for 2 yrs+ (in cups)

Meal Orders

Delete Menu

Edit Meal Count

Edit Food Production

Delete Food Production

Finalize Food Production Record

To delete a menu for multiple days:

- Click on Menu on the main dashboard.
- Click on the “Delete Menus” button at the top of the page.
- Select the Delete From, Delete To and Meal you wish to delete.
- Click the red “Delete Menus” button.

Delete Menus

Delete From *07/05/2021

Delete To *07/09/2021

Meal *All selected

Delete Menus

Menu: Food Production: Creating New Food Production Records



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.
5. In order to see the output of a Food Production Record, look under Reports.

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.
- Food production has four columns:
 1. Numbers for Production Record: these are the numbers that are manually entered by the center to be used in food production calculations.
 2. Estimate from Schedules: these numbers will always be zero.
 3. Actual Meal Counts: this column will be filled in for dates that are TODAY or in the PAST and will include the actual counts of each participant in each age category.
 4. Age Range: A list of the CACFP age ranges.

Food Production			Breakfast 03/08/2021
Numbers for Production Record	Estimate from Schedules	Actual Meal Counts	Age Range
<input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	1 year olds
<input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Transition Month (24 months)
<input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	2 year olds
<input type="text" value="2"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	3-5 year olds
<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	6-12 year olds
<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	13-18 year olds
<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	Adults

Estimate Production

- Complete the fields for “Number for Production Records”. 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
<input type="text" value="1"/>	Cup	Whole Milk for 1 yr olds (in cups)
<input type="text" value="3.5"/>	Cup	1% Milk for 2 yrs+ (in cups)
<input type="text" value="4"/>	Ounces	English Muffins, Enriched (in oz)
<input type="text" value="2.5"/>	Cup	Apples, fresh or canned (in cups)

- **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.

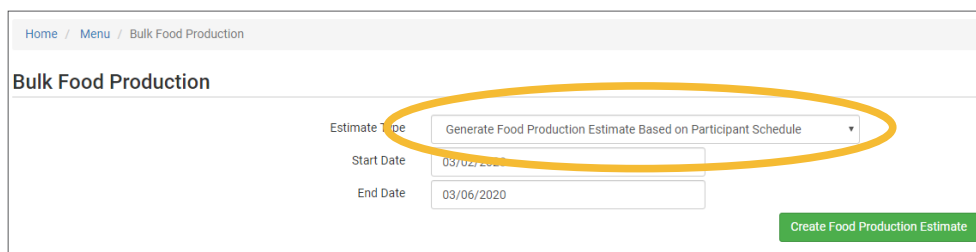
	Food Production	1 Cup Whole Milk for 1 yr olds (in cups) 3.5 Cup 1% Milk for 2 yrs+ (in cups) 4 Ounces English Muffins, Enriched (in oz) 2.5 Cup Apples, fresh or canned (in cups)
--	-----------------	---

Before creating a new food production record:

1. Make sure that a menu is planned. If no menu is planned, the button “Food Production Estimates” 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.
5. In order to see the output of a Food Production Record, look under Reports.

To create a new food production record in bulk:

- Click on “Menu” on the main dashboard.
- Click the “Food Production Estimates” button.
- Select the Estimate Type:
 - Generate Food Production Estimate Based on Participant Schedule: if you use this option, the system will use participant schedules to generate estimates in the future. This can help with food procurement! (Note: if meal counts are already taken, then the system will use those instead of schedules).
 - Generate Food Production Estimate Based on Manual Inputs: use this option if you don’t have participant schedules entered. This allows you to input an estimated attendance by age range for each meal type.
- Remember that you MUST enter menus before generating food production records!



Home / Menu / Bulk Food Production

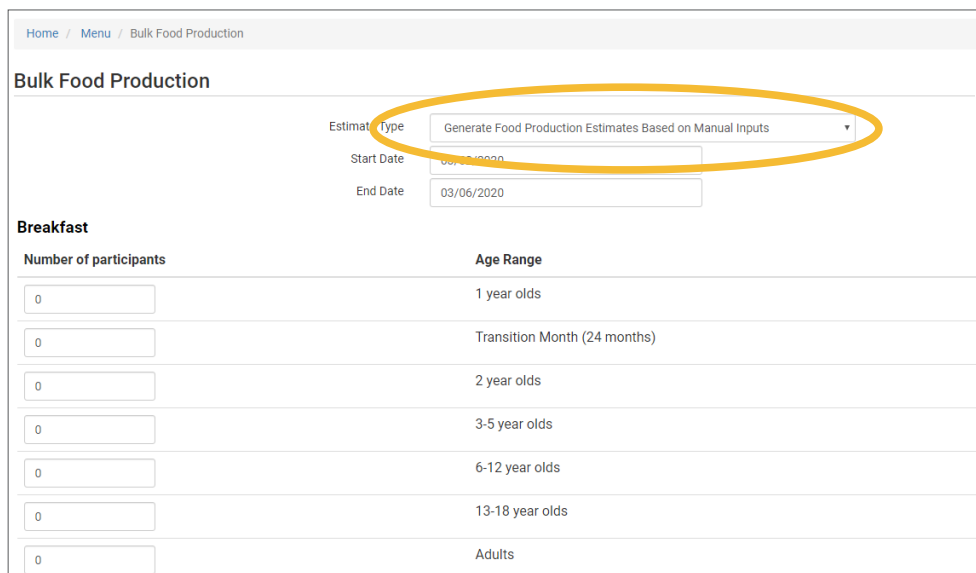
Bulk Food Production

Estimate Type: Generate Food Production Estimate Based on Participant Schedule

Start Date:

End Date:

[Create Food Production Estimate](#)



Home / Menu / Bulk Food Production

Bulk Food Production

Estimate Type: Generate Food Production Estimates Based on Manual Inputs

Start Date:

End Date:

Breakfast

Number of participants	Age Range
<input type="text" value="0"/>	1 year olds
<input type="text" value="0"/>	Transition Month (24 months)
<input type="text" value="0"/>	2 year olds
<input type="text" value="0"/>	3-5 year olds
<input type="text" value="0"/>	6-12 year olds
<input type="text" value="0"/>	13-18 year olds
<input type="text" value="0"/>	Adults

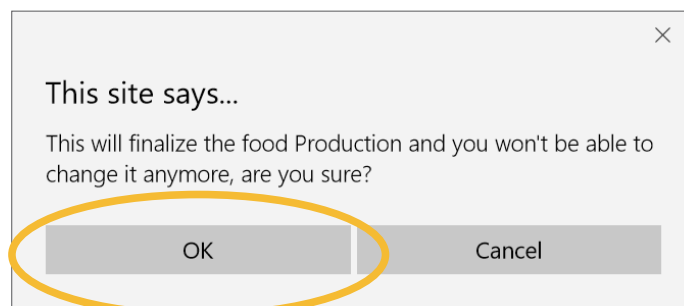
Menu: Food Production: Finalizing Food Production Records

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.

The Meal Details screen displays the following information:

- Date: 07/11/2018
- Meal: AM Snack
- Description For Print View: Cottage Cheese, Triscuit
- Menu: 1 Age-Appropriate Portion Cottage cheese, 1 Age-Appropriate Portion Crackers, Triscuit, original
- Save Menu button
- Meal Count: 6
- Food Production: 15 Crackers Crackers, Triscuit, original, 3.5 oz Cottage cheese
- Buttons: Edit Infant Menu, Edit Meal Count, Delete Food Production
- Food Production Record Finalized: 07/29/2018 (circled in yellow)

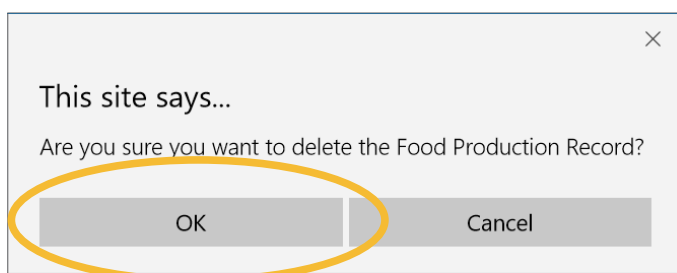
Menu: Food Production: Deleting Food Production Records

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.

Menu: Food Production: Food Production Report



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 range 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	Age Range	Actual Headcount	Planned Headcount	Amount	Unit	Component	Food Item
Menu	English Muffins, Apples and Milk.	Preschoolers	2	3	2.75	Cup	Fruit	Apples
		School Age 1	1	1	4.00	oz eq	Grains	English muffins, enriched
		Toddlers	3	3	3.25	Cup	Fluid Milk	1% Milk for all participants 2 and older
		Non-CACFP	1	1	1.50	Cup	Fluid Milk	Whole milk for ages 12-23 months
		Adult	1	1				
Date Served	Meal	USDA Age Range			Food Production Amounts			
08/02/2018	Lunch	Age Range	Actual Headcount	Planned Headcount	Amount	Unit	Component	Food Item
Menu	Beef Meatballs Tater Tots Peaches Hamburger Bun Milk	Preschoolers	23	24	8.00	half pints	Fluid Milk	Whole milk for 12-23 month (in half-pints)
		School Age 1	18	18	53.00	half pints	Fluid Milk	1% milk for ages 2+ (in half-pints)
		Toddlers	19	19	91.00	oz	Meat/Meat Alternate	Meatball, Ckn Trky Beef 1 oz FZN 160CT
		Non-CACFP	1	1	39.50	oz eq	Grains	Bun, Hamburger Wheat 4.25" FZN 8CT
		Adult	1	1	4.69	lbs	Fruit	Peaches, canned (in lbs)
					5.56	lbs	Vegetable	Potato, Nugget Par-fried FZN 5 LB
		Infants						
		0-5 Months	1	1				

You must create a meal order for a date in the future. If you try to create a meal order for the current date, or a date in the past, the “Edit Meal Order” button will not appear.

To create a meal order using the web app:

- Click on “Menu” on the main dashboard.
- Click on the date and meal for which you would like to create a meal order.
- Click on the blue “Edit Meal Order” button in the lower right corner.
- Enter information in the following fields:
 - Quantity of meals: enter the quantity of meals for the appropriate USDA age range
 - Instructions: use this field to enter notes, such as dietary needs or delivery instructions
- Click on the green “Save” button to save this to the meal with the ability to continue to edit.
- Click on the green “Send to Sponsor” button to finalize the meal order and no longer be able to edit.

Meal Orders

Date

05/18/2020

Meal

Lunch

Age Range

6 Years - 12 Years

Quantity of meals

Instructions

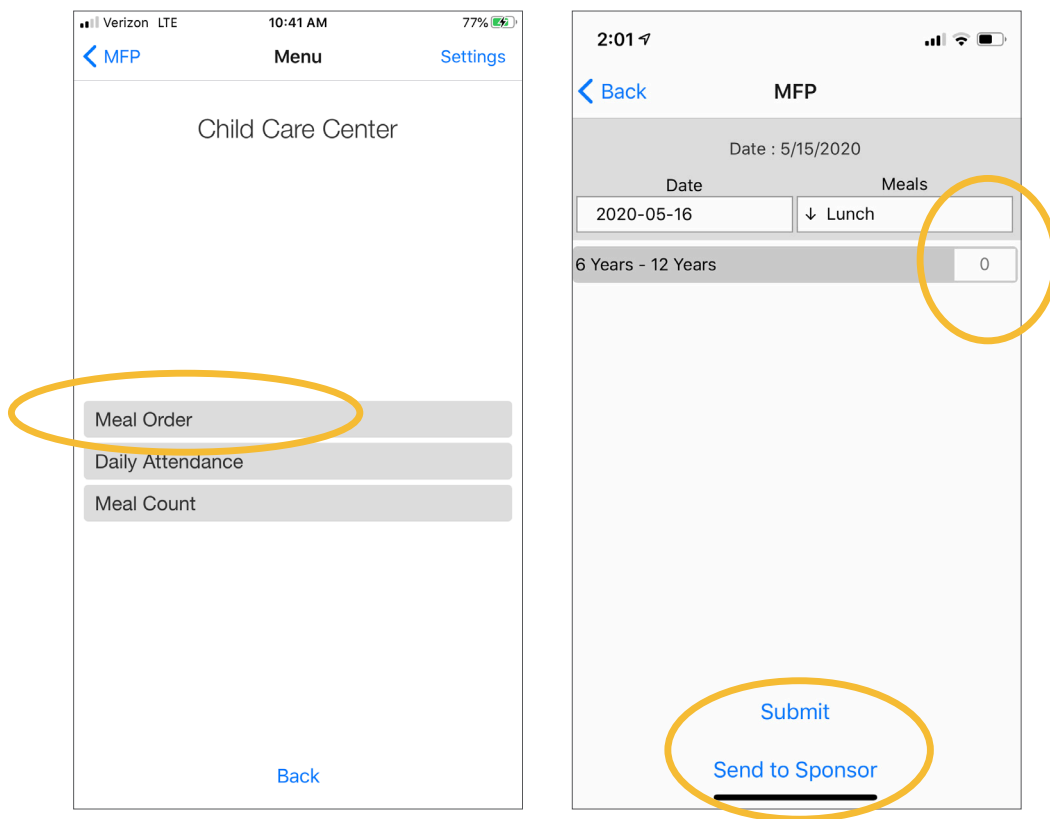
Save

Send to Sponsor

You must create a meal order for a date in the future. If you try to create a meal order for the current date, or a date in the past, the “Edit Meal Order” button will not appear.

To create a meal order using the mobile app:

- Click on the “Meal Order” button.
- Click on the date and meal for which you would like to create a meal order.
- Enter information in the following fields:
 - Quantity of meals: enter the quantity of meals for the appropriate USDA age range
- Click “Submit” to save this to the meal with the ability to continue to edit.
- Click “Send to Sponsor” to finalize the meal order and no longer be able to edit.

The image contains two screenshots of a mobile application. The left screenshot shows the 'Menu' screen with a 'Child Care Center' header and three buttons: 'Meal Order', 'Daily Attendance', and 'Meal Count'. The 'Meal Order' button is circled in orange. The right screenshot shows the 'MFP' (Meal Form) screen. It has a 'Date' field set to '2020-05-16' and a 'Meals' dropdown menu set to 'Lunch'. Below these is a section for '6 Years - 12 Years' with a quantity field set to '0', which is also circled in orange. At the bottom of the screen, there are two buttons: 'Submit' and 'Send to Sponsor', both of which are circled in orange.

*Food
Temperatures*

My Food Program can be used to track food temperatures at three different points in the process:

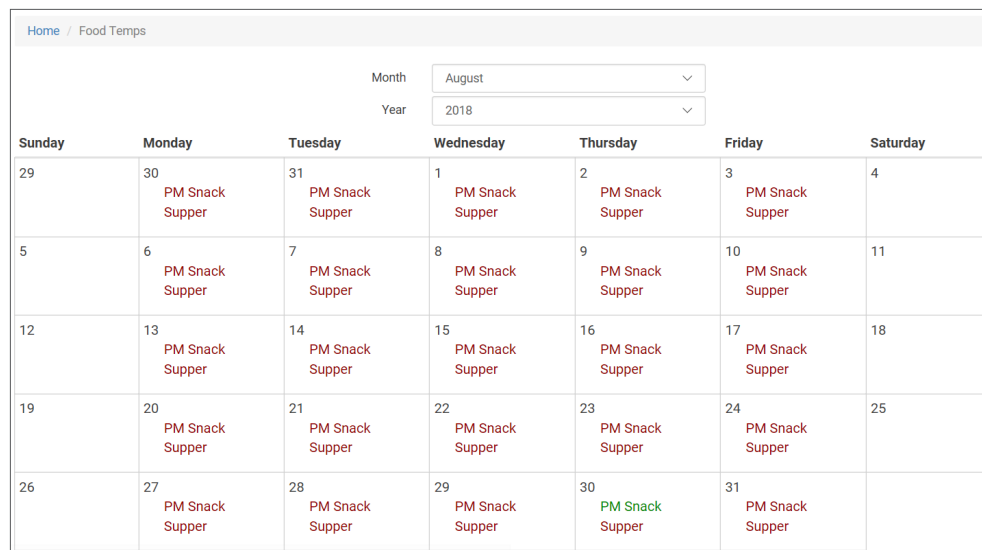
- When it leaves the caterer,
- When it arrives at the program, and
- When it is served.

Sponsors can set required meals and temperature time points in Site Details and may disallow meals that are outside of the safe temperature range.

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

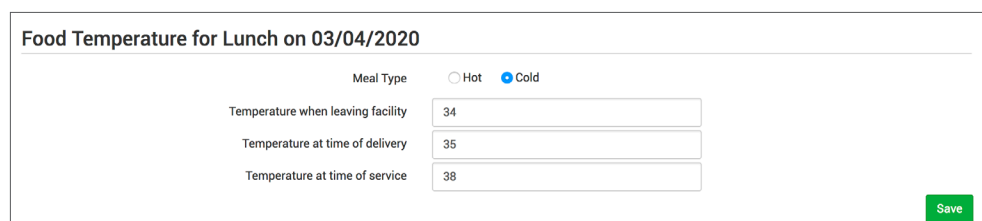
To enter a food temperature using the web app:

- 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



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30 PM Snack Supper	31 PM Snack Supper	1 PM Snack Supper	2 PM Snack Supper	3 PM Snack Supper	4
5	6 PM Snack Supper	7 PM Snack Supper	8 PM Snack Supper	9 PM Snack Supper	10 PM Snack Supper	11
12	13 PM Snack Supper	14 PM Snack Supper	15 PM Snack Supper	16 PM Snack Supper	17 PM Snack Supper	18
19	20 PM Snack Supper	21 PM Snack Supper	22 PM Snack Supper	23 PM Snack Supper	24 PM Snack Supper	25
26	27 PM Snack Supper	28 PM Snack Supper	29 PM Snack Supper	30 PM Snack Supper	31 PM Snack Supper	

- Enter the food temperatures and select whether the meal type is Hot or Cold. You may enter one, two or all three food temperatures.
- Click “Save”.
- You can print a summary of food temperatures using the Food Temperature Report.



Food Temperature for Lunch on 03/04/2020

Meal Type ☐ Hot ☒ Cold

Temperature when leaving facility

Temperature at time of delivery

Temperature at time of service

[Save](#)

My Food Program can be used to track food temperatures at three different points in the process:

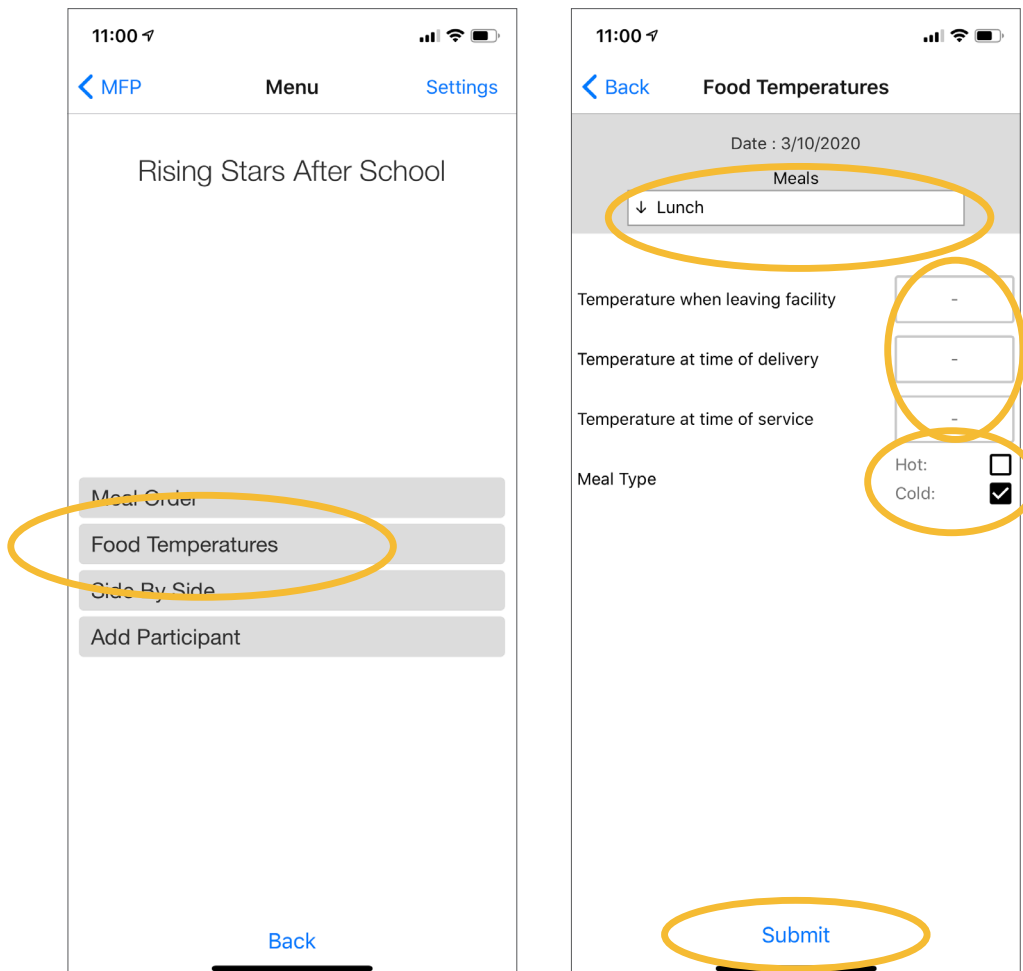
- When it leaves the caterer,
- When it arrives at the program, and
- When it is served.

Sponsors can set required meals and temperature time points in Site Details and may disallow meals that are outside of the safe temperature range.

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

To enter a food temperature using the mobile app:

- Click on “Food Temps” on the main dashboard.
- Select the meal from the drop-down menu.
- Enter the food temperatures. You may enter one, two or all three food temperatures.
- Select whether the meal type is Hot or Cold.
- Click “Submit”

The image contains two screenshots of a mobile application interface. The left screenshot shows the 'Menu' screen with a title 'Rising Stars After School' and a list of options: 'Meal Order', 'Food Temperatures', 'Side By Side', and 'Add Participant'. The 'Food Temperatures' option is circled in yellow. The right screenshot shows the 'Food Temperatures' form. It includes a date field set to '3/10/2020', a 'Meals' dropdown menu with 'Lunch' selected (circled in yellow), three input fields for temperature at different stages (each with a '-' placeholder and circled in yellow), a 'Meal Type' section with 'Hot' (unchecked) and 'Cold' (checked) options (circled in yellow), and a 'Submit' button at the bottom (circled in yellow).

Meal Count

Meal Count: Taking Meal Counts Using Web 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:

- 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.

A screenshot of the "Meal Count" web application interface. The title "Meal Count" is at the top left. Below it, the text "Other Users Counts" is visible. The form contains several input fields and dropdown menus. A yellow circle highlights the "Date" field (showing "09/21/2018"), the "Meal *" dropdown (showing "PM Snack"), and the "Meals Received/Prepared" and "Meals Available from Previous Days" fields (showing "125" and "25" respectively). Another yellow circle highlights the "Save" button at the bottom right. A red button labeled "DELETE ALL HEADCOUNTS FOR THIS ROSTER & MEAL" is located at the bottom left. Other fields include "First Meals" (137), "Second Meals Served to Children" (0), "Meals Served to Program Adults" (0), "Meals Served to Non-Program Adults" (0), "Non-reimbursable meals" (1), "Leftover Meals" (12), and "Number of additional children requesting a meal" (0).

Field	Value
Date	09/21/2018
Meal *	PM Snack
Meals Received/Prepared	125
Meals Available from Previous Days	25
First Meals	137
Second Meals Served to Children	0
Meals Served to Program Adults	0
Meals Served to Non-Program Adults	0
Non-reimbursable meals	1
Leftover Meals	12
Number of additional children requesting a meal	0

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

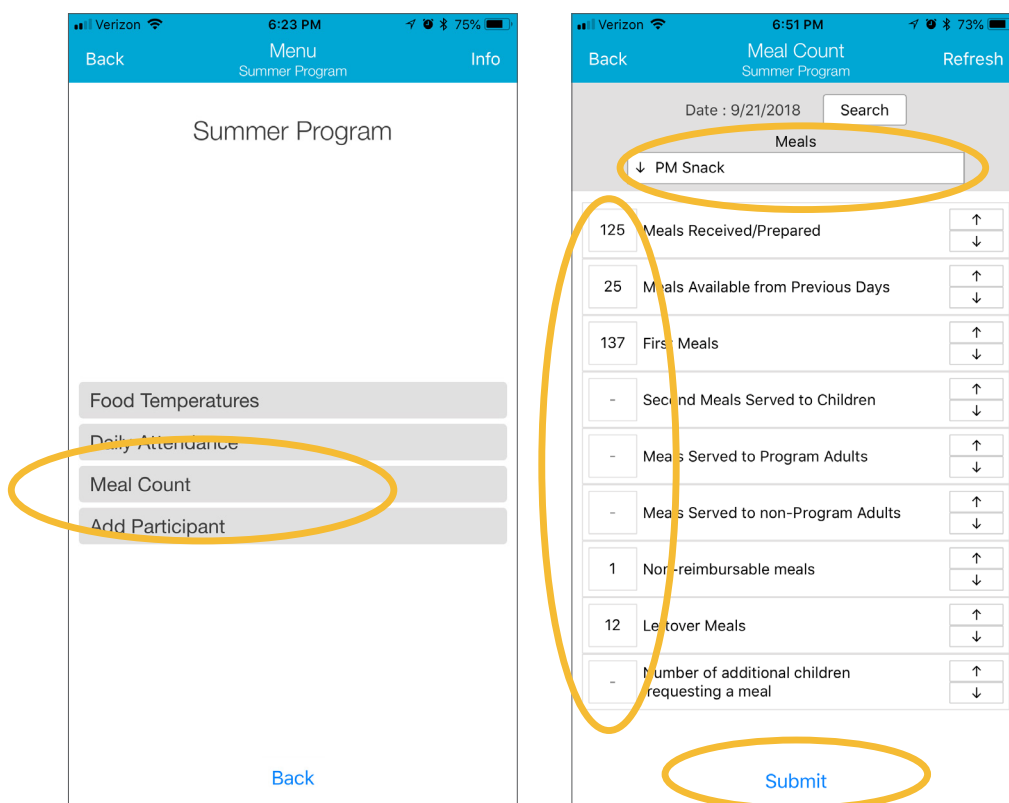
Meals counts can be recorded two ways:

- 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, then 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.

Click the blue “Click to Set or Reset Password” button to reveal confirmation fields:

- **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
- Primary Contact for Site (optional)
- Allowed to Add Participants on Mobile (optional): this option will allow the staff to add participants using the mobile app.
- Allowed to Record Hours on Mobile (optional): this option will allow the staff to record hours worked using the mobile app.
- Allowed to Change Participant ARAM Flag (optional): this option will allow the staff to check or un-check the box on the Participant Page that indicates a child’s eligibility to participate in the At-Risk Afterschool Meals Program.
- Allowed to delete receipts: this option will allow the staff to delete receipts.
- Allow expense entry after claim creation: this option will allow staff to enter expenses for a month with a claim.
- **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 or Infant Teacher can access menus, meal counts, participants & rosters and record hours.
- Notes (optional): for your recordkeeping.
- Sign Here: add signatures for “Site Manager/Director” permission level users. These signatures will populate on the Daily, Weekly and Monthly Meal Count with Attendance Reports along with the date that the site submitted their claim to their sponsor.

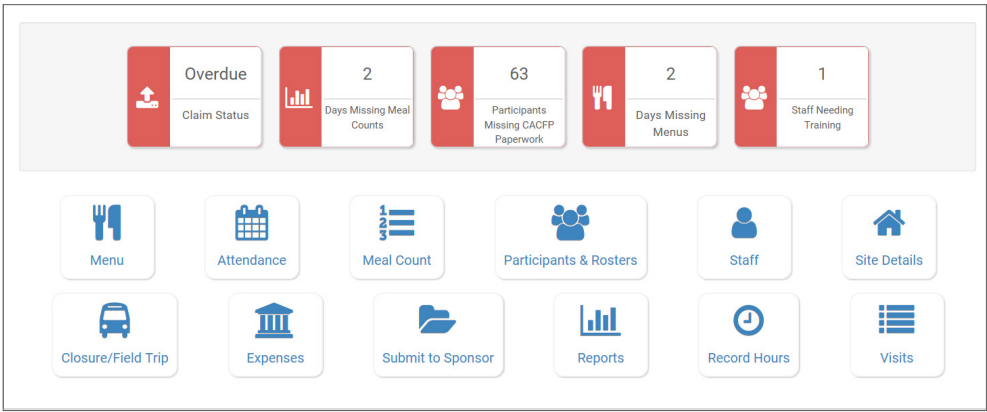
Under “Hourly Rate” click the blue “+ Add” button:

- Hourly Rate (optional): if you are using My Food Program to track payroll expenses for the purpose of demonstrating a nonprofit meal service, enter a start date, end date and hourly rate.
- Click “Save”.

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

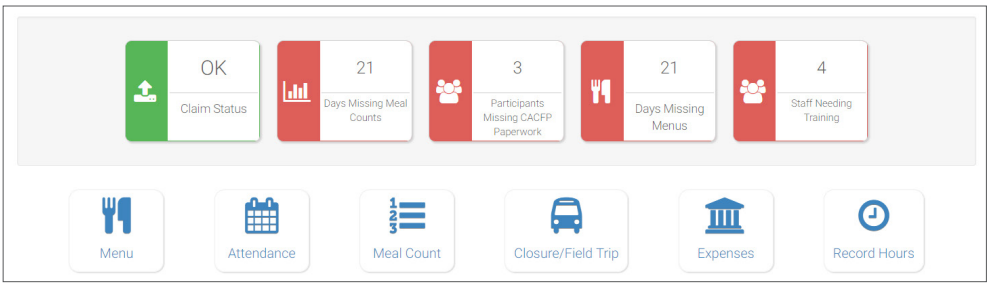
- Site Manager/Director
- Staff
- Kitchen Staff

The dashboard for a Site Manager/Director looks like this:

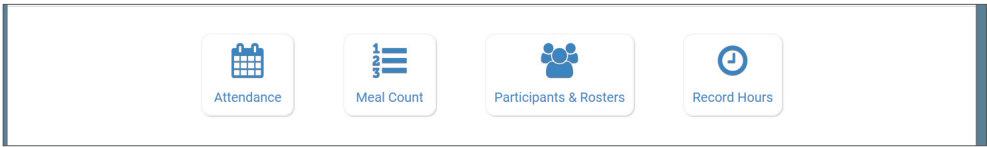


Site Manager/Directors have full access to all features.

The dashboard for a Kitchen Staff looks like this:



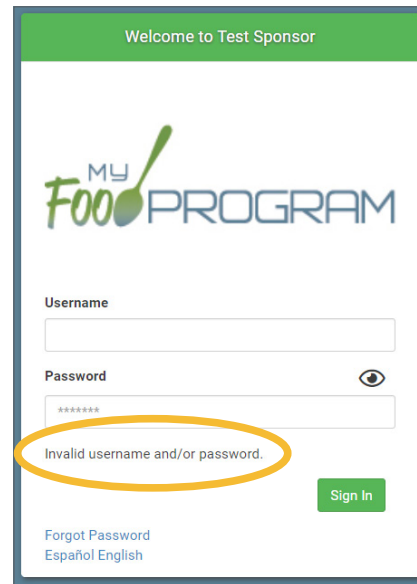
The dashboard for a Staff looks like this:



Site-level users can be set to either Active or Inactive status.

To change the status of a site-level user:

- Click on “Staff” on the main dashboard.
- Click on the name of the staff member..
- Under Status, select either Active or Inactive.
- Click “Save”.
- **Note:** if a staff member is set to Inactive, they will receive the following message when trying to login: “Invalid username and/or password.”

A screenshot of the MY Foo PROGRAM login interface. At the top is a green banner with the text "Welcome to Test Sponsor". Below this is the MY Foo PROGRAM logo. The login form includes a "Username" field, a "Password" field with a toggle icon, and a "Sign In" button. An error message, "Invalid username and/or password.", is displayed below the password field and is circled in orange. At the bottom, there are links for "Forgot Password" and "Español English".

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:
 - **Training Date (required)**: use the date picker or type in the date on which the training occurred.
 - **Training Type (required)**: select Civil Rights and CACFP Required Elements or Other.
 - **Description** (optional): for your recordkeeping.
 - **Upload Training**: 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	<input type="text"/>
Training Type	<input type="text" value="Select"/> ▼
Description	<input type="text"/>
Upload Training	<input type="text"/> <input type="button" value="Browse..."/>

Staff: Add Existing Staff Members to a Site



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”.

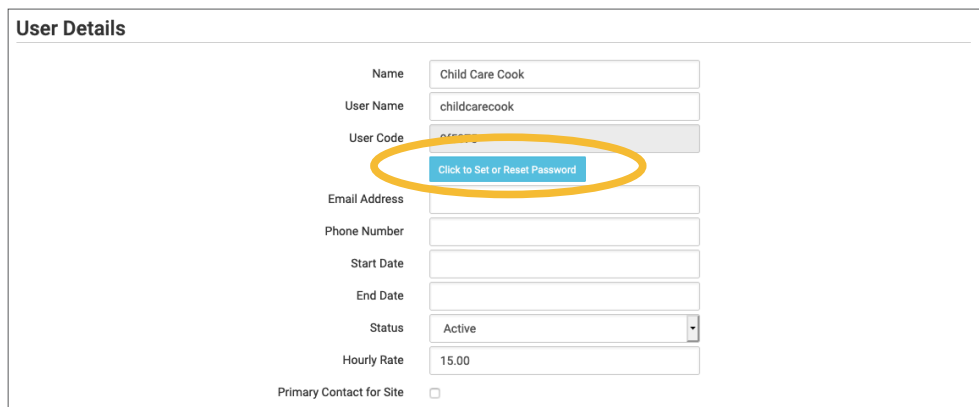
Now when that staff person logs into My Food Program, the system will prompt them to select the site that they want to access:

Choose the Site You Wish to Work With:
Child Care Center
Test Center 2

For security reasons, passwords are not viewable in the User Details. Even though you cannot see the passwords, they are stored and saved in the system in a secure format.

To change a staff member's password:

- Click on “Staff” from the main dashboard.
- Click on the name of the staff member whose password you would like to change.
- Click the blue “Click to Set or Reset Password” button to reveal confirmation fields.
- Enter the new password into the Password field.
- Re-Enter the new password in to the Confirmed Password field.
- Click “Save”.



User Details

Name	Child Care Cook
User Name	childcarecook
User Code	015555
	Click to Set or Reset Password
Email Address	
Phone Number	
Start Date	
End Date	
Status	Active
Hourly Rate	15.00
Primary Contact for Site	<input type="checkbox"/>

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, family child care home or summer food). Note: only the types of programs that you sponsor are included as options.
	Preferred Language	select English or Spanish
	Intended Start Date	for your recordkeeping.
	Actual Start Date	for your recordkeeping.
	End Date	for your recordkeeping.
✓	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	the name of the vended meal contractor that you use
	Food Contracting Entity ID	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	
	County	
	Mailing Address, City, State, Zip	this will be copied from the physical address automatically if nothing is entered.
	Email Address	
	Phone	
	Second Phone	
	Primary Contact User	List of the site users that are marked as primary contacts. See the Staff section for information on how to designate primary contacts.
	Monitors	The designated monitor for this site. Sponsors can assign monitors to specific sites in the Sponsor Users section.
✓	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.

REQUIRED	FIELD	DESCRIPTION
	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.
✓	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.
✓	Meal Count Entry	select how you want your screen to look when taking meal counts. Options include “Daily entry with separate screens for attendance and meal counts”, “Daily entry with combined screen for attendance and meal counts”, “Daily entry of meal counts only (attendance records kept outside of My Food Program)”, “Weekly attendance and meal count from paper”.
	Reimbursement Method	select “Actual Meal Count by Type” or “Blended per Meal”.
✓	Summer Food Area Type	Select from Vended/Urban or Self-Prep/Rural. The Summer Food area type will change the reimbursement rates used to determine your claim estimate.
	Allowed to claim three meals	if this button is checked, you are able to claim breakfast, lunch and supper.
	Require menus before meal counts	if this flag is checked, then users are required to enter a menu before they can check children in for a meal. They will receive a proactive message on the web and mobile app telling them that the menu is required. In addition, menu cannot be edited after a meal count is entered. *Does NOT apply to infant rosters.
	Require finalized food production records before meal counts	if this flag is checked, then users are required to enter a menu, create a food production record and finalize that food production record before children can be checked in for a meal. They will receive a proactive message on the web and mobile app telling them that a finalized food production record is required. In addition, the food production record cannot be deleted after a meal count is entered. *Does NOT apply to infant rosters.
	Shifts are an option for Meal Times (defaults to unchecked)	this allows users to record participants in shifts for meals. See separate instructions for details.
	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.
	Enhanced sponsor control of available food items	select this option if you want to manage the foods available to sites. When this box is checked, sites are restricted to adding only Favorite Foods to their menus and Sponsors have control over the Favorite Foods List.
	Ignore Meal Validation (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.
	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)	checking this box turns on the ability for a site to generate invoices for children based on their number of hours or days in care and the daily rates. See separate instructions for details.

REQUIRED	FIELD	DESCRIPTION
	Allow meal orders to be entered using the mobile app	checking this box allows you to enter meal orders using the My Food Program mobile app.
	Hide Check for Errors Button	checking this box means that the site cannot see their claim errors prior to submitting their claim to their sponsor.
	Hide Submit to Sponsor Button (defaults to unchecked)	some sponsors find that sites prematurely and accidentally 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).
	Require temperatures before meal counts	Temperatures must be entered before meal counts can be entered. The system will automatically re-direct users to the food temperature page if they attempt to enter a meal count
	Disallow Temperatures outside of range	if your state agency requires that you disallow any meals that are outside of the safe temperature range, select this box and be sure to enter the safe temperature range in Sponsor Setup
	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.
	Payment Method	select either “Check” or “Direct Deposit”.
	Notes	use this field to enter notes for the site. These notes are visible to the site users.
	Iron-Fortified Infant Formula Offered by Center or Provider	Use this field to indicate the brand of iron-fortified infant formula offered to enrolled infants.
✓	Missing Infant Notification Errors	If you want meals for infants disallowed if they are missing an Infant Meal Notification, the select Error. The Infant Meal Notification is the form that indicates if the parent or the provider is supplying the breastmilk/formula and solid foods. If you want to pay for infant meals even if no Infant Meal Notification is on-file, then select Ignore.
	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.
	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	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.

REQUIRED	FIELD	DESCRIPTION
✓	Site Meal Times	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 Licensing	if you would like to use My Food Program to validate that meal counts do not exceed licensed capacity, then you should enter licensing information here. See separate instructions for details.
	Age Range Combinations	if you would like to add the restriction of age range combinations in addition to the site licensing capacity, you would enter that here. See separate instructions for details.
	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.
	Facility License	enter the state issued license number for your facility here. See separate instructions for details.
	Record Log - Viewable by Sponsor Only	Record information or correspondence with the site using a free-form text box. Unlike the "Notes" box, the Record Log is not viewable by the provider or center.

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 (optional): 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 (optional): assists with identification.
 - Email Address (optional)
 - 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

Name	<input type="text"/>
Position	<input type="text"/>
Birthdate	<input type="text"/>
Term Dates	<input type="text"/>
Address	<input type="text"/>
Email Address	<input type="text"/>
Employer	<input type="text"/>
Job Title at Employer	<input type="text"/>
Conflicts	<input type="text"/>

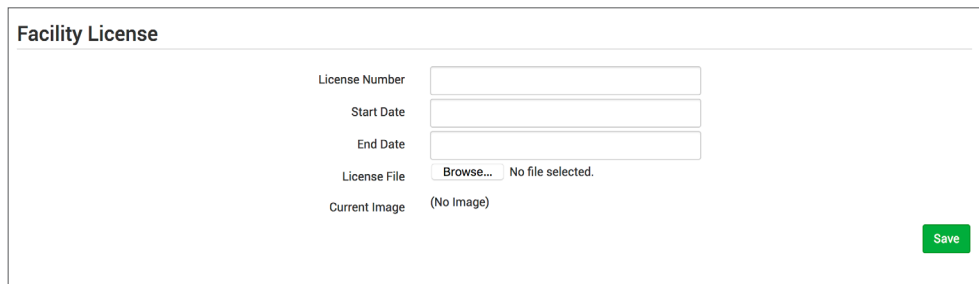
☐ Can Vote
☐ Receives Compensation

Save

My Food Program can be used to verify that the facility is licensed by the state agency.

To add a facility license:

- Click on “Site Details” on the main dashboard.
- Scroll to the “Facility License” section at the bottom.
- Click on the blue “Add Facility License” button.
- Enter the fields:
 - License Number
 - Start Date
 - End Date
 - License File: upload an image of the license for your records.
- Click “Save”.

A screenshot of the "Facility License" form. The form has a title "Facility License" at the top left. Below the title, there are four rows of input fields. The first row is "License Number" with a text input field. The second row is "Start Date" with a date input field. The third row is "End Date" with a date input field. The fourth row is "License File" with a "Browse..." button and the text "No file selected." Below these fields, there is a "Current Image" label and the text "(No Image)". In the bottom right corner of the form, there is a green "Save" button.

Note: you can add multiple licenses into this section. For example, if your license is about to expire and you have your new one already completed, you can save them both in here.

Closure/Field Trip

Closure/Field Trip: Adding and Viewing a 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”.

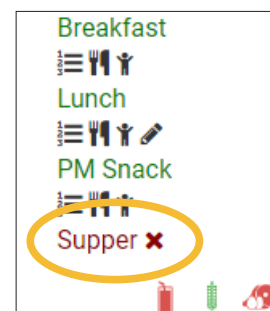
The screenshot shows a web form titled "Field Trips and Closures". It contains the following fields and options:

- Reason Off Site:** A dropdown menu with "Select" as the current option.
- Date Off Site:** A text input field.
- Meals not served at site:** A list of meal types with checkboxes:
 - ☐ Early Snack
 - ☐ Breakfast
 - ☐ AM Snack
 - ☐ Lunch
 - ☐ PM Snack
 - ☐ Supper
 - ☐ Evening Snack
- Save:** A green button in the bottom right corner.

A recorded closure/field trip will show on the menu calendar with a red X.

You will not be able to take meal counts for these meals. If you try to record a meal count you will receive the following error: “Site closure for this day and meal.”

If you record attendance and meal counts and then add the closure, those meals will be disallowed with the following error: “Meals/Snacks claimed outside of the operating days.”



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”.

Milk Audit

The “Milk Audit” feature of My Food Program allows sponsors to conduct a milk audit without needing to print and compare reports.

To enter a milk audit:

- Click on “Milk Audit” on the main dashboard.
- Select the following:
 - **Month/Year (required):** the date for the audit.
 - **Calculation Type (required):**
 - Calculated from Attendance: this will take the minimum portion size for milk times the number of participants in each age range and calculate how much milk you should have used.
 - Food Production Amounts: this will take the usage amounts right from your food production records. Ensure that you have entered a food production record for each of the meals with milk so you have accurate amounts.
 - **Audit Type (required):**
 - By Day: this version gives you a running balance by day and meal of how much milk is on hand.
 - By Month: this version gives you a bottom line for the entire month.
- Click “Create Milk Audit” button.
- Under “Manual Increase” enter the Opening Balance:
 - Enter the date.
 - Select “Opening Balance” under Reason.
 - Select Milk Type.
 - Enter Amount and Units: note that the opening balance should be equal to the ending balance from the previous month.
 - Click “Save”.

Any milk purchases entered using our Expense feature will be automatically pulled into the report. Users also have the option to manually increase milk amounts to reflect an opening balance or purchase not entered in our Expense tracker. Users can manually decrease amounts if there is spoilage/waste or additional servings of milk.

Milk Audit By Month		Calculated From Attendance - Feb 2020	
Reason	Fluid Milk Type	Purchase	Usage
Opening Balance	1% Milk	72 Cups	
Purchase <input checked="" type="checkbox"/>	1% Milk	16 Cups	
1% Milk \$	1% Milk	640 Cups	
1% milk \$	1% Milk	320 Cups	
Whole milk \$	Whole Milk	80 Cups	
Whole Milk \$	Whole Milk	160 Cups	
Breakfast	1% Milk		524 Cups
Breakfast	Whole Milk		119 Cups
Lunch	1% Milk		523 Cups
Lunch	Whole Milk		119 Cups
Spoilage/Waste	Whole Milk		1 Cups
Usage Subtotal	1% Milk		1,047 Cups
Usage Subtotal	Whole Milk		239 Cups
Ending Balance	1% Milk	1 Cups	
	Whole Milk	1 Cups	

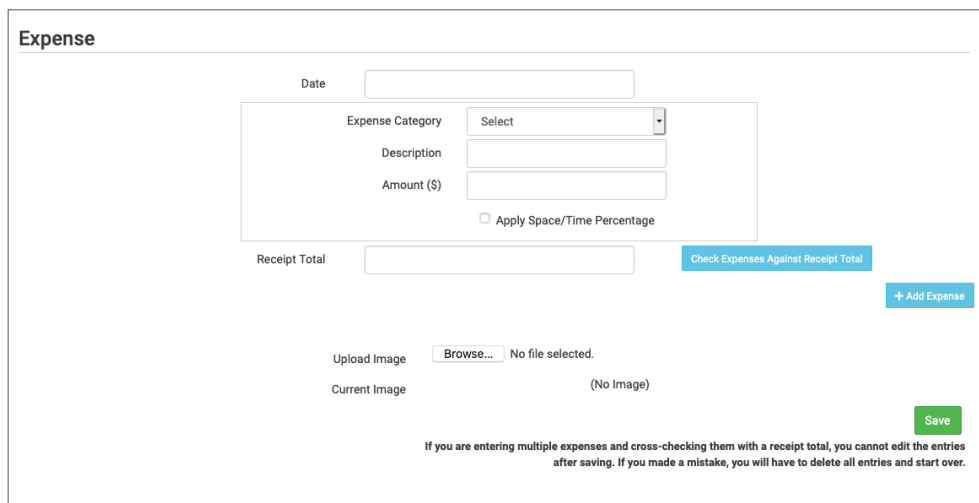
\$ Expense ☒ Manual Increase

Expenses

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

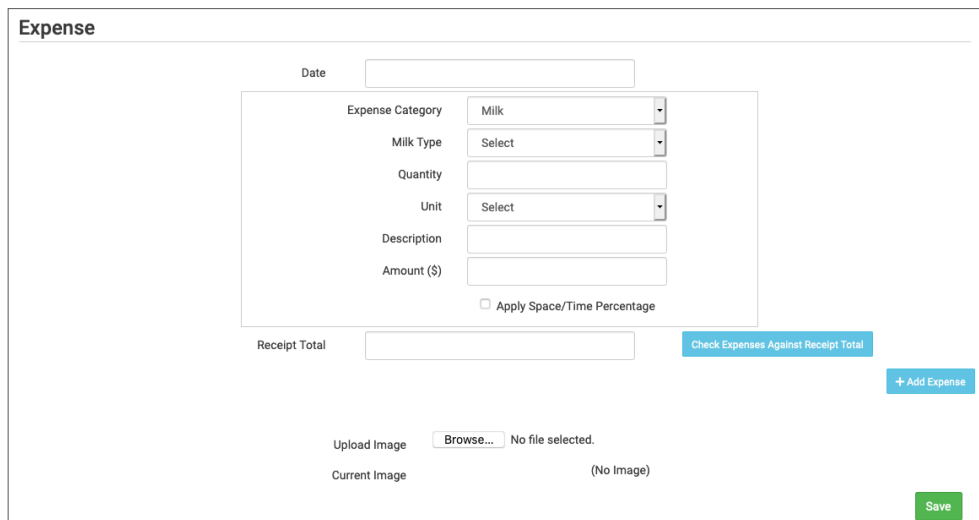
To add a new expense:

- 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)
 - Note: there is a list of active staff to select from when recording expenses under any categories related to labor and benefits.
 - **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 allocating 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”.
 - Receipt Total: enter a receipt total.
 - Click “Check Expenses Against Receipt Total” to cross-check the sum of expenses to the receipt total.
 - If you have several categories for one receipt/invoice, click the blue “+ Add Expense” button.
 - Upload Image (optional, but recommended): upload a photograph or scan of the receipt. If you added multiple expenses, the uploaded receipt image will be associated with each of your entries.
- Click “Save” and the expense is now viewable and will be included in expense reports.

A screenshot of the "Expense" form in the My Food Program interface. The form is titled "Expense" and contains several input fields and buttons. At the top, there is a "Date" field. Below it, a group of fields includes "Expense Category" (a dropdown menu with "Select" as the current value), "Description", "Amount (\$)", and a checkbox labeled "Apply Space/Time Percentage". Below these fields is a "Receipt Total" field. To the right of the "Receipt Total" field is a blue button labeled "Check Expenses Against Receipt Total". Further to the right is another blue button labeled "+ Add Expense". Below the "Receipt Total" field, there is an "Upload Image" section with a "Browse..." button and the text "No file selected." Below that is a "Current Image" section with the text "(No Image)". At the bottom right of the form is a green "Save" button. At the very bottom, there is a small disclaimer: "If you are entering multiple expenses and cross-checking them with a receipt total, you cannot edit the entries after saving. If you made a mistake, you will have to delete all entries and start over."

To add a new milk 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)**: select Milk from the dropdown menu.
 - **Milk Type**: select from: Skim, 1%, 2%, Whole or Fluid Milk Substitute.
 - **Quantity**: enter the quantity purchased.
 - **Unit**: select from: Ounces, Cups Half Gallons or Gallons.
 - **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 - Whole Milk”.
 - **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”.
 - **Receipt Total**: enter a receipt total.
 - Click “Check Expenses Against Receipt Total” to cross-check the sum of expenses to the receipt total.
 - If you have several categories for one receipt/invoice, click the blue “+ Add Expense” button.
 - **Upload Image** (optional, but recommended): upload a photograph or scan of the receipt. If you added multiple expenses, the uploaded receipt image will be associated with each of your entries.
- Click “Save” and the expense is now viewable and will be included in expense reports.
- Note: the information saved here will feed into the *Milk Purchased Report*.



The screenshot shows the 'Expense' form with the following fields and controls:

- Date**: A text input field.
- Expense Category**: A dropdown menu with 'Milk' selected.
- Milk Type**: A dropdown menu with 'Select' selected.
- Quantity**: A text input field.
- Unit**: A dropdown menu with 'Select' selected.
- Description**: A text input field.
- Amount (\$)**: A text input field.
- Apply Space/Time Percentage**: A checkbox.
- Receipt Total**: A text input field.
- Check Expenses Against Receipt Total**: A blue button.
- + Add Expense**: A blue button.
- Upload Image**: A 'Browse...' button and the text 'No file selected.'
- Current Image**: The text '(No Image)'.
- Save**: A green button.

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.

Expenses: Nonprofit Food Service Account Status



You are able to track the balance in the nonprofit food service account to ensure that the CACFP reimbursement is being appropriately spent.

To track balances:

- Click on “Expenses” from the main dashboard.
- Click the blue “Nonprofit Food Service Account Status” button on the upper-right corner.
- Set the opening balance. Either type a number in or click the green button on the left to copy the closing balance from the prior month.
- Reimbursement for Operating (85% of meal reimbursement plus cash in lieu of commodities) is populated based on the claim data but can be edited if necessary.
- Reimbursement for Admin (15% of meal reimbursement) is populated only for self-sponsored sites and is based on the claim.
- Operating Expenses are drawn directly from the receipt ledger.
- Admin Expenses are drawn directly from the receipt ledger and only available for self-sponsored sites.
- If you edit the opening balance or change the reimbursement amounts, you can re-calculate the ending balance for a month by clicking the green button on the right.

[Home](#) / [Expense List](#) / Nonprofit Food Service Account Status

Nonprofit Food Service Account Status

Month/Year		Opening Balance	Reimbursement for Operating*	Reimbursement for Admin*	Operating Expenses**	Admin Expenses**	Ending Balance	Save
Oct 2020	Copy Closing Balance from Prior Month							Recalculate
Sep 2020	Copy Closing Balance from Prior Month	\$ -34,912.03	\$ 0	\$ 0	\$ 0.00	\$ 0.00		Recalculate
Aug 2020	Copy Closing Balance from Prior Month	\$ -35,055.18	\$ 2,235.51	\$ 0	\$ 2,092.36	\$ 0.00	\$ -34,912.03	Recalculate
Jul 2020	Copy Closing Balance from Prior Month	\$ -32,668.49	\$ 2,347.89	\$ 0	\$ 4,734.58	\$ 0.00	\$ -35,055.18	Recalculate
Jun 2020	Copy Closing Balance from Prior Month	\$ -29,191.36	\$ 2,547.74	\$ 0	\$ 6,024.87	\$ 0.00	\$ -32,668.49	Recalculate
May 2020	Copy Closing Balance from Prior Month	\$ -25,709.15	\$ 1,991.51	\$ 0	\$ 5,473.72	\$ 0.00	\$ -29,191.36	Recalculate
Apr 2020	Copy Closing Balance from Prior Month	\$ -21,047.24	\$ 807.2	\$ 0	\$ 5,469.11	\$ 0.00	\$ -25,709.15	Recalculate

*Check for Errors
or Submit to
Sponsor*

Check for Errors or Submit to Sponsor: Claims Step 1: Meal Validation by Site



The claims process has five steps:

1. Meal validation (“check for errors”) by the provider.
2. Review and correction of any errors by the provider.
3. Submission to sponsor by the provider.
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 “Check for Errors or Submit to Sponsor” on the main dashboard.
- Select the Month/Year from the pop-up window and click “Load”.
- 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 provider configuration, this might stop your claim from proceeding. Check provider 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.
- Scroll to the bottom of the page and click “Check for Errors”.

A screenshot of a web application interface for meal validation. At the top, there are four status boxes: "Submitted to Sponsor", "Claim Created", "Claim Sent to State", and "Payment Expected", each with a calendar icon. Below these is a section titled "New Meal Attendance Entered Since Last Check for Errors" with a date/time stamp "05/04/2021 at 09:48 AM" and a dropdown menu showing "May 2021". A table with columns "Date", "Meal", "Menu Entered", "Meal Count", and "Food Production" is present. Below the table is a "Meal Errors" section with a message: "These meals were last checked for errors on 05/04/2021 at 09:48 AM, any data that has been changed since then is not reflected in the meal errors listed below, including the addition of any enrollment forms or menu changes." It includes a table with "Error Description" and "Error Count", showing "No claim errors". A link "Details on meal errors can be found on the Disallowed Meals Report" is provided. Below this is a "Checked Meal Attendance" section with another table with the same columns as the first one. At the bottom, there are three buttons: "Check for Errors" (highlighted with a yellow circle), "Submit to Sponsor", and "Withdraw Meal Submission".

Check for Errors or Submit to Sponsor: Claims Step 1: Meal Validation by Site



- The system will now run the meals through validation and display a progress bar. 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.
 - Licensed capacity was not exceeded.
 - Meal counts did not exceed attendance.
 - Menus meet meal pattern requirements.
 - All children were within the licensing age ranges of the facility.
 - Enrollment forms are current for all participants checked in for meals.
 - Infant menus were entered.
- Once the meal validation is complete, the list of meals will disappear and any errors generated will be displayed below. If no claim errors are found, the Review Claim Errors and Disallow Meals screen displays a message that confirms no claim errors were found. See separate instruction for details on how the site should review these errors prior to submitting their meal counts to their sponsor.

Completed!

Submitted to Sponsor

Claim Created

Claim Sent to State

Payment Expected

New Meal Attendance Entered Since Last Check for Errors 05/04/2021 at 09:47 AM

May 2021

Date	Meal	Menu Entered	Meal Count	Food Production
------	------	--------------	------------	-----------------

Meal Errors

These meals were last checked for errors on 05/04/2021 at 09:47 AM , any data that has been changed since then is not reflected in the meal errors listed below, including the addition of any enrollment forms or menu changes.

Error Description	Error Count
No claim errors	

Details on meal errors can be found on the [Disallowed Meals Report](#)

Checked Meal Attendance

Date	Meal	Menu Entered	Meal Count	Food Production
------	------	--------------	------------	-----------------

Check for Errors or Submit to Sponsor: Claims Step 2: Review of Errors by Site



The claims process has five steps:

1. Meal validation (“check for errors”) by the provider.
2. Review and correction of any errors by the provider.
3. Submission to sponsor by the provider.
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. **For details on any claim errors, you can run the *Disallowed Meals Report* to help you resolve the errors. If you still have questions, please contact your sponsor.**

Check for Errors or Submit to Sponsor: Claims Step 3: Submit to Sponsor by Site

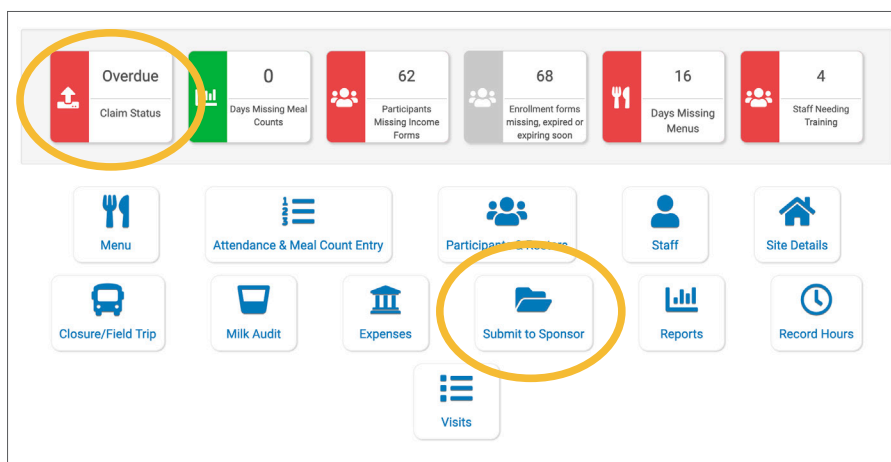
The claims process has five steps:

1. Meal validation (“check for errors”) by the provider.
2. Review and correction of any errors by the provider.
3. Submission to sponsor by the provider.
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 (Step 2), 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:

- You will know that your Claim has not been submitted If your Claim Status is RED.
- Click on “Review Claim Errors and Disallow Meals” (logged in as sponsor) or “Check for Errors 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.



prod.myfoodprogram.com says

This will finalize the meals for this month and you won't be able to change it anymore, are you sure?

OK

Cancel

Check for Errors or Submit to Sponsor: Claims Step 3: Submit to Sponsor by Site



- 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. A progress bar is displayed on the screen and once the check of meals and attendance is complete, the page will automatically refresh and the results will display on the screen.
- When claim submission is complete, the “Check for Errors or Submit to Sponsor” button disappears and the first date icon will now be GREEN and show the date. In addition, the site can no longer change menus or alter meal count or attendance records.
- You can also see your claim has been submitted from your dashboard as the Claim Status will now be GREEN.

Submitted to Sponsor
04/28/2020

Claim Created

Claim Sent to State

Payment Expected

New Meal Attendance

March 2020

Date	Meal	Menu Entered	Meal Count

Meal Errors

Error Description	Error Count
Meals claimed for children who are not enrolled in the program	2
Meals claimed for children who have expired enrollments in the program	6
Meals for which there are no menus	2
Meals for which there is no infant menu	1
Meals/snacks claimed in excess of the approved age range license capacity	2

Checked Meal Attendance

Date	Meal	Menu Entered	Meal Count
03/03/2020	Breakfast	true	5
03/05/2020	Breakfast	false	5
03/23/2020	Breakfast	false	1

Withdraw Meal Submission

OK
Claim Status

0
Days Missing Meal Counts

62
Participants Missing Income Forms

68
Enrollment forms missing, expired or expiring soon

16
Days Missing Menus

4
Staff Needing Training

Menu

Attendance & Meal Count Entry

Participants & Rosters

Staff

Site Details

Closure/Field Trip

Milk Audit

Expenses

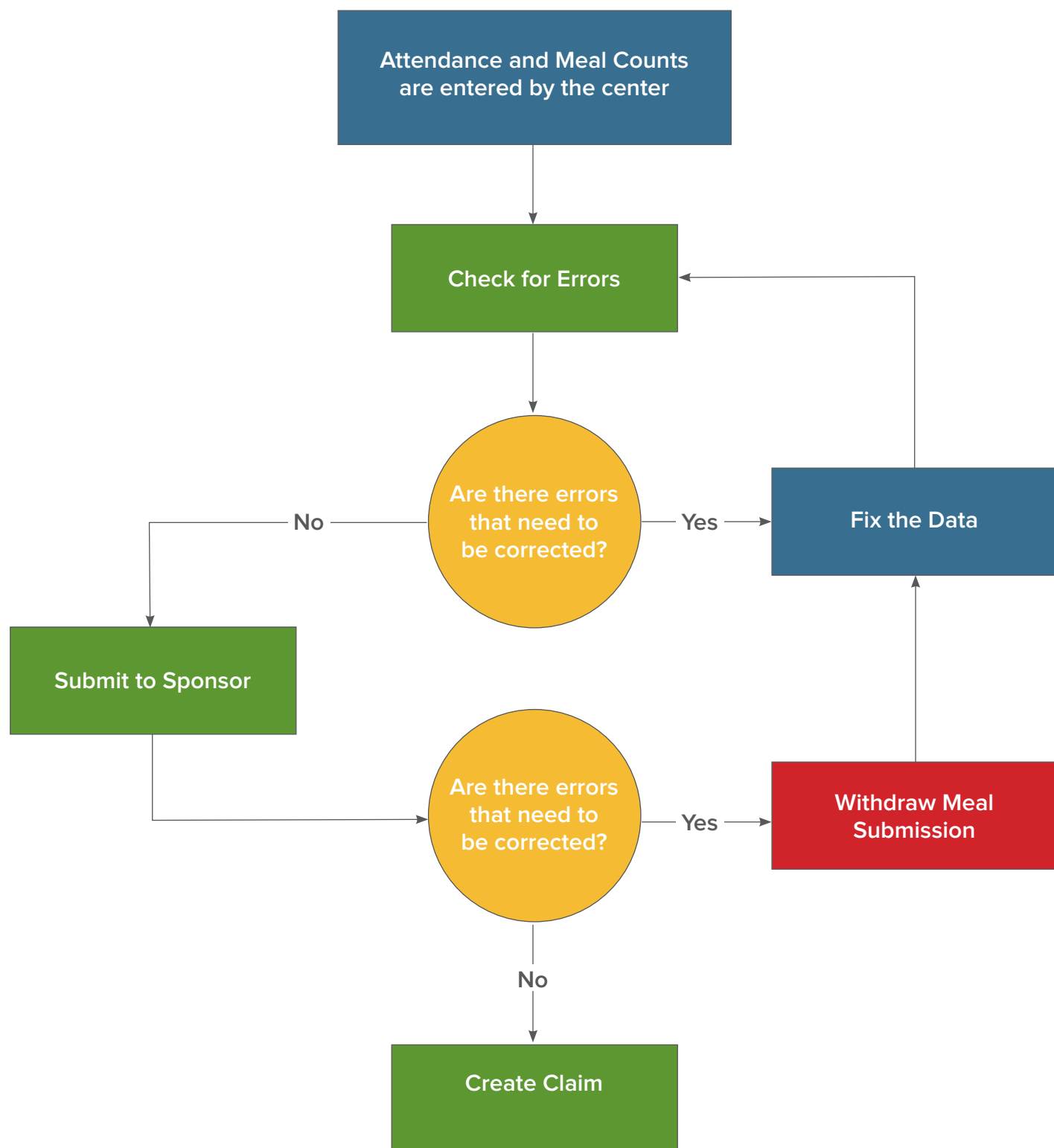
Submit to Sponsor

Reports

Record Hours

Visits

Process Claim



Process Claim: Claims Step 4: Review of Errors by Sponsor



NOTE: the dashboard icon “Review Claim Errors and Disallow 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 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 Claim Errors and Disallow 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 CACFP rules and not incorrect input, the corresponding meals will be disallowed in the claims creation process.**

There is a green button labeled “Check for New Enrollment Forms” that allows you to specifically look for enrollment forms that have been added to the software in the time between when the provider or center clicked “Submit to Sponsor” but before the claim is created. This button will disappear once a claim is created and is hidden from the provider or center.

There is another button called “Resubmit with Sponsor Changes”. This will allow sponsors to correct any recordkeeping mistakes related to attendance, meal counts, menus or add additional enrollment or income forms and re-submit the claim WITHOUT changing the date/time that the site originally submitted their information to the sponsor. IF a new date/time stamp on submission is needed, the “Withdraw Meal Submission” button can be used for that purpose. This button will appear after a provider or center has submitted their claim to the sponsor but a claim has not been created yet.

#	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.

Process Claim: Claims Step 4: Review of Errors by Sponsor



#	ERROR	HOW IT GETS TRIGGERED	HOW TO GET DETAILS	WHAT TO DO NEXT
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.
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".
6	Too many meals claimed for program	This error is only applicable to sites that do headcount meal counts. It is triggered when the site is attempting to claim more than 2 meals and 1 snack or 1 meal and 2 snacks, which would require meal count by name	Site Details will have the meals offered by the site.	Switch the site from Meal Count Method "Headcount" to "Roster" or remove the available meals and snacks to 2 meals and 1 snack or 2 snacks and 1 meal.

Process Claim: Claims Step 4: Review of Errors by Sponsor



#	ERROR	HOW IT GETS TRIGGERED	HOW TO GET DETAILS	WHAT TO DO NEXT
7	Meal count is zero for head count based site.	A menu is entered but no children were marked in for the meal.	Disallowed Meals Report will list the meal(s) and snack(s) without a count entered.	Enter meal counts if they were recorded on a backup (ex: paper or other system), otherwise they must remain disallowed.
8	Meal temperatures out of range	The sponsor has set the policy to disallow meals that are outside of the safe range and a food temperature was recorded outside of the safe range.	The Food Temperature Report will have all recorded food temperatures for each meal.	Adjust any food temperatures that were entered incorrectly.

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



NOTE: the dashboard icon “Review Claim Errors and Disallow 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:

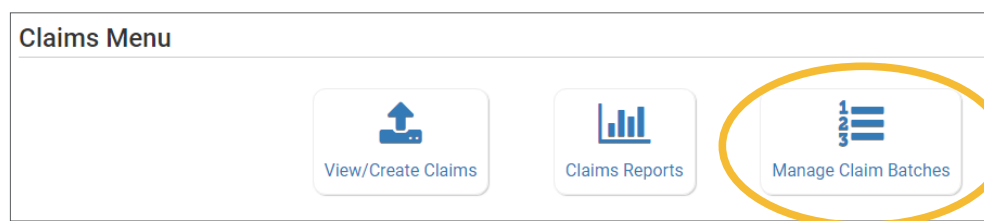
1. Meal validation (“check for errors”) by the site.
2. Review and correction of any errors by the site.
3. Submission to sponsor by the site.
4. Correction of any errors by the sponsor.
5. Claims creation by the sponsor.

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
--------------	----------------	--------------

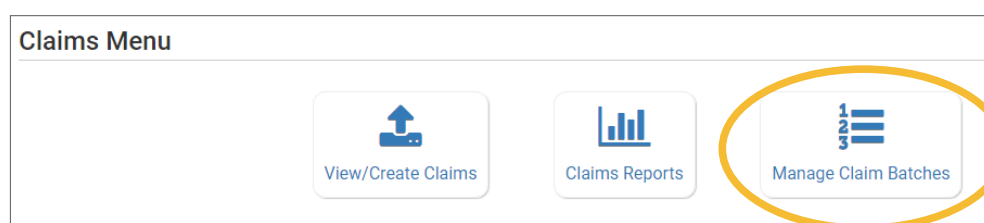
Process Claim: Claims Step 5: Processing Claims for All Sites with Batches

NOTE: the dashboard icon “Review Claim Errors and Disallow 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 Claim Errors and Disallow 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
 - if no attendance or meal counts have been entered for the month
 - if attendance and meal counts have been entered for the month
 - if it is a manual claim site
- Site Submitted to Sponsor
 - if the site still needs to submit their attendance and meal counts to sponsor
 - if the site has submitted their attendance and meal counts (along with date/time stamp)
 - if it is a manual claim
- Claim Errors
 - if there are claim errors
 - 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 Claim Errors and Disallow 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 Claim Errors and Disallow 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		Claim			SFSP Claim
		Counts	Site Submitted to Sponsor	Errors	CACFP Claim	ARAM Claim	
Adult Day Center	Adult Day Care						
Child Care Center	Child Care Center		02/17/2020 10:37 AM		02/17/2020 10:37 AM		
Child Care Home	Family Child Care Home				02/10/2020 10:53 AM		
Rising Stars After School	After School Program		03/04/2020 05:39 PM			03/04/2020 05:39 PM	
Safe Harbor Shelter	Emergency Shelter						

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

The Payments to Sites screen allows you to track whether you have sent payment to your sites for a claim month.

To record payments for sites:

- Click on “Claims” on the main sponsor dashboard and then select “Claim Payments”.
- In the upper-right hand corner select a month with claims already created.
- A list will populate with every site that a claim was created for the selected month. This list includes:
 - Site Name; Site ID; Site Type; Claim Type
 - Includes
 - Original Claim
 - Adj Only: a claim adjustment created after the original claim was paid.
 - Original Claim + Adj: a claim adjustment created before the original claim was paid.
 - Total Claim: this field is editable and initially displays our estimate. It is recommended that you change this value to the amount of reimbursement provided by your state agency as differences in rounding protocols sometimes means our estimates are off.
 - Operating Funds: similar to Total Claim field. Not applicable for Family Day Care Homes.
 - Payment to Site Amount
 - Paid: check individually or all at once using the top checkbox.
 - Date/Time
 - External Bill ID: this will be blank for now. New features coming soon!
- Click the green “Save” button in the upper-right hand corner.
 - NOTE: Once you click save the software will prevent any paid claims from ever being rolled back.
 - The Date/Time stamp will be added to the claims that have been marked as paid.
- You have the option to export this data as a spreadsheet by selecting Paid, Unpaid or All from the drop-down menu in the upper-left hand corner of the screen and clicking “Export as .csv”.
- NOTE: any changes made to claim amounts on this screen will be reflected in the Site-Level Claim Summary Report, Sponsor-Level Claim Summary Spreadsheet and the Nonprofit Food Service Account Status.

Payments to Sites										12/01/2020
All										Export as .csv
										Save
Site Name	Site ID	Site Type	Claim Type	Includes	Total Claim	Operating Funds*	Payment to Site Amount	Paid	Date/Time	External Bill ID
After School Program	C067	After School Program	ARAM	Original Claim	123.01	105.33	\$105.33	<input type="checkbox"/>		
Child Care Center Example 1	81	Child Care Center	CACFP	Original Claim	2878.45	2480.38	\$2,480.38	<input type="checkbox"/>		
Child Care Center Example 2	36	Child Care Center	CACFP	Original Claim	992.00	851.43	\$851.43	<input type="checkbox"/>		
Family Child Care Home Example 1	313	Family Child Care Home	CACFP	Original Claim	\$330.19		\$330.19	<input checked="" type="checkbox"/>	01/29/2021 15:43:21 EST	
Family Child Care Home Example 2	217	Family Child Care Home	CACFP	Original Claim	1460.42		\$1,460.42	<input type="checkbox"/>		
Family Child Care Home Example 3	448	Family Child Care Home	CACFP	Original Claim	356.16		\$356.16	<input type="checkbox"/>		
Family Child Care Home Example 4	318	Family Child Care Home	CACFP	Original Claim	\$394.86		\$394.86	<input checked="" type="checkbox"/>	01/29/2021 15:31:55 EST	
Family Child Care Home Example 4	318	Family Child Care Home	CACFP	Adj Only	19.50		\$19.50	<input type="checkbox"/>		
Family Child Care Home Example 5	459	Family Child Care Home	CACFP	Original Claim + Adj	441.88		\$441.88	<input type="checkbox"/>		

Process Claim: Quickbooks Initial Setup and Paying Bills



1X

ONE TIME

- ☐ Turn on Quickbooks Integration
- ☐ Link Quickbooks and My Food Program
- ☐ Designate Liability and A/P Accounts
- ☐ Match Quickbooks Vendors and My Food Program Sites

To Turn on Quickbooks Integration:

- Click on “Setup” from the main sponsor dashboard.
- Click on the “Sponsor Setup” button.
- Scroll down to Payment Integration and select Quickbooks from the drop-down menu for Integration Type.
- Click “Save” and return to the Setup menu. There should now be a “Connect to Quickbooks” button.


To Link My Food Program and Quickbooks:


- Click on “Connect to Quickbooks”. NOTE: you will need your Quickbooks username and password.
- Click on the “QB Connect” button and login to Quickbooks.
- You will now return to the My Food Program page with a connection confirmation at the top.
- You will also see information for your access token which may need to be renewed every few months.
- There is also a “Disconnect Quickbooks” button that you can use at anytime.

To Designate Liability and A/P accounts:

- You will need to select your Liability and Accounts Payable accounts and click on Save.

Sponsor Connected to Quickbooks Company Sandbox Company_US_2
The access tokens will need to be renewed after 05/16/2021 17:03:51 CDT


Reset Authentication


Disconnect Quickbooks

Billing Accounts

Account Name	Number	Description	Use Account for Site Bills
Reimbursement Pass-Through		Reimbursement Owed to Sponsored Centers and Providers	<input type="checkbox"/>
State Sales Tax Payable			<input type="checkbox"/>

A/P Accounts

Account Name	Number	Description	Use Account for Site Bills
Accounts Payable		Money Owed to Vendors	<input type="checkbox"/>

Process Claim: Quickbooks Initial Setup and Paying Bills



To Match your Quickbooks Vendors and your My Food Program Sites:

- Click on “Sites” from the main sponsor dashboard and select the name of your site.
- Click on the “Link to Quickbooks” button.
- You will see a list of the active vendors in your Quickbooks account. Select the one that matches your site within My Food Program.
- Click on the green “Save” button.

Quickbooks Vendors for company Sandbox Company_US_2

Vendor Name	Use Vendor
Example Center 1	<input type="checkbox"/>
Example Center 2	<input type="checkbox"/>
Example Provider 1	<input type="checkbox"/>
Example Provider 2	<input type="checkbox"/>
Example Provider 3	<input type="checkbox"/>
Example Provider 4	<input type="checkbox"/>
Example Provider 5	<input type="checkbox"/>

Save



MONTHLY

- ☐ Mark Claims as Paid to Send Bills from My Food Program to Quickbooks
- ☐ Pay Bills in Quickbooks

To Mark Claims as Paid to Send Bills from My Food Program to Quickbooks:

- Click on “Claims” on the main sponsor dashboard and then select “Claim Payments”.
- In the upper-right hand corner select a month with claims already created.
- A list will populate with every site that a claim was created for the selected month. This list includes:
 - Site Name; Site ID; Site Type; Claim Type
 - Includes
 - Original Claim
 - Adj Only: a claim adjustment created after the original claim was paid.
 - Original Claim + Adj: a claim adjustment created before the original claim was paid.
 - Total Claim: this field is editable and initially displays our estimate. It is recommended that you change this value to the amount of reimbursement provided by your state agency as differences in rounding protocols sometimes means our estimates are off.
 - Operating Funds: similar to Total Claim field. Not applicable for Family Day Care Homes.
 - Payment to Site Amount
 - Paid: check individually or all at once using the top checkbox.
 - Date/Time: this will be added once you click save.
 - External Bill ID: this will be added on save and matched to Quickbooks.
- Click the green “Save” button in the upper-right hand corner. NOTE: Once you click save the software will prevent any paid claims from ever being rolled back.
- You have the option to export this data as a spreadsheet by selecting Paid, Unpaid or All from the drop-down menu in the upper-left hand corner of the screen and clicking “Export as .csv”.
- NOTE: any changes made to claim amounts on this screen will be reflected in the Site-Level Claim Summary Report, Sponsor-Level Claim Summary Spreadsheet and the Nonprofit Food Service Account Status.

										12/01/2020
All										Export as .csv
										Save
Site Name	Site ID	Site Type	Claim Type	Includes	Total Claim	Operating Funds*	Payment to Site Amount	Paid	Date/Time	External Bill ID
After School Program	C067	After School Program	ARAM	Original Claim	123.01	105.33	\$105.33	<input type="checkbox"/>		
Child Care Center Example 1	81	Child Care Center	CACFP	Original Claim	2878.45	2480.38	\$2,480.38	<input type="checkbox"/>		
Child Care Center Example 2	36	Child Care Center	CACFP	Original Claim	992.00	851.43	\$851.43	<input type="checkbox"/>		
Family Child Care Home Example 1	313	Family Child Care Home	CACFP	Original Claim	\$330.19		\$330.19	<input checked="" type="checkbox"/>	01/29/2021 15:43:21 EST	
Family Child Care Home Example 2	217	Family Child Care Home	CACFP	Original Claim	1460.42		\$1,460.42	<input type="checkbox"/>		
Family Child Care Home Example 3	448	Family Child Care Home	CACFP	Original Claim	356.16		\$356.16	<input type="checkbox"/>		
Family Child Care Home Example 4	318	Family Child Care Home	CACFP	Original Claim	\$394.86		\$394.86	<input checked="" type="checkbox"/>	01/29/2021 15:31:55 EST	

Process Claim: Quickbooks Initial Setup and Paying Bills

To Pay Bills in Quickbooks:

- Login to your Quickbooks account.
 - Click on “+ New” in the upper left-hand corner and select “Pay Bills” under Vendors.
 - You will see a list of all your bills which you can either select all using the top button or select individually.
 - Click the green “Schedule payments online” button. You will be taken to the Bill Pays page.

PAYEE	REF NO.	DUE DATE	OPEN BALANCE	CREDIT APPLIED	PAYMENT	TOTAL AMOUNT
Example Center 1		03/09/2021	\$2,512.51	Not available	2,512.51	\$2,512.51
Example Center 2		03/09/2021	\$977.15	Not available	977.15	\$977.15
Example Center 2		03/09/2021	\$915.95	Not available		\$0.00
Example Provider 1		03/09/2021	\$391.66	Not available	391.66	\$391.66
Example Provider 3		03/09/2021	\$771.01	Not available	771.01	\$771.01
Example Provider 4		03/09/2021	\$657.71	Not available	657.71	\$657.71

- For each bill, select the account you want to use as your Payment Method and confirm the Delivery Method. Check and ACH payments have no fees, while Credit Card payments incur a processing fee.
- Once you have confirmed all the bills, click on the green “Schedule all payments” button at the bottom.
- You will have the option to email the receipt to your centers or providers stating the amount, date and delivery method for their payments.

VENDOR	DEDUCTION DATE	DELIVERY DATE	PAYMENT METHOD	DELIVERY METHOD	AMOUNT
Example Center 1	Mar 4, 2021	Mar 9, 2021	Set method	Bank	\$2,512.51
Example Center 2	Mar 4, 2021	Mar 9, 2021	Set method	Bank	\$977.15
Example Provider 1	Mar 4, 2021	Mar 9, 2021	Set method	Bank	\$391.66
Example Provider 3	Feb 26, 2021	Mar 5, 2021	Set method	Check	\$771.01
Example Provider 4	Mar 4, 2021	Mar 9, 2021	Set method	Bank	\$657.71

Process Claim: Rolling Back Claims



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.

Process Claim: Put a Claim on Hold

To put a claim on hold:

- Click on “Process Claim” on the main dashboard.
- Select the month/year of the claim and click the orange “Create Hold” button.
- This claim will now be skipped and the claim type will be listed as HOLD. It will also display the date and time and who the hold was placed by.
- To release the hold, just click the blue “Remove” button to the right of the claim.



Claims					
		January 2021	Select Batch	Create Claim	Create Hold
Claim Date	Claim Type	Batch	Claim Made By	Claimed On	Action
Jan 2021	HOLD		ctwait	01/22/2021 05:23 PM	X Remove
Jun 2020	CACFP	2	System Admin	01/22/2021 01:11 PM	Sponsor Manual Adjustments
Apr 2020	CACFP	1	System Admin	05/08/2020 11:42 AM	Sponsor Manual Adjustments

Process Claim: Adjust Payment Amounts to Match Funds Received From States



Sponsors in states using the Blended Per Meal method for calculating reimbursement sometimes see a small discrepancy between the claim estimates calculated by My Food Program and the claim amounts received from the state agency due to rounding protocols. Sponsors have the ability to enter the total amount of funds received from the state and My Food Program will automatically re-calculate the individual site claim amounts.

To adjust payment amounts:

- From the Sponsor dashboard select the “Claims” tab.
- Select “Claims Payments”.
- On the right-hand side, select the month and year and click “Done”. Your payments will appear in a list below.
- Enter the “Actual Amount Received From State For UNPAID Claims” in the box at the bottom.
- If the amount differs from the estimate, click the blue “Adjust Unpaid Claims Total to Match Total Claim Amount Received from State” and the individual site claim amounts will be automatically re-calculated.
- Be sure to mark the claims as paid in order for the new amounts to overwrite our original estimates.
- Click the green “Save” button when finished.

Payments to Sites05/01/2021

All

Export as .csv












Save


Site Name	Site ID	Site Type	Claim Type	Includes	Site Claim Total	Operating Funds*	Payment to Site Amount	Paid <input type="checkbox"/>	Date/Time	External Bill ID
Test Center #2	67584	Child Care Center	ARAM	Original Claim	<input type="text" value=".96"/>	<input type="text" value=".82"/>	\$.82	<input type="checkbox"/>		
Test Center #2	67584	Child Care Center	CACFP	Original Claim	<input type="text" value="6.24"/>	<input type="text" value="5.30"/>	\$5.30	<input type="checkbox"/>		
Total For All Sites					\$7.20	\$6.12	\$6.12			
UNPAID Total For All Sites					\$7.20	\$6.12	\$6.12			
Actual Amount Received From State For UNPAID Claims					<input type="text"/>	<div>Adjust Unpaid Claim Total to Match Total Claim Amount Received from State</div>				













*Operating Funds are the payment to the center. It includes 85% of meal reimbursement and 100% of cash-in-lieu of commodities.

Reports

Below is our full list of available reports, separated by the following categories: Attendance & Meal Counts, Claims, Financial, Food Service Operations, Participant, Recordkeeping and Staff. If your state agency requires a specific report, we can develop new reports to meet those requirements. If you have any questions, please reach out.

REPORT NAME	DESCRIPTION	USER SELECTIONS	ACCESS LEVEL	SAMPLE REPORT
 ATTENDANCE & MEAL COUNT REPORTS				
Meal Counts by Meal Type	This reports shows the total meal counts and additional counts for each day for each meal.	Date Range	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Daily Meal Count Tally Report	A printout of the daily meal count in each category (first meals, second meals, adult meals, leftovers, etc.) along with a space for a staff signature.	Date Meal	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
 CLAIMS REPORTS				
Claim Summary Report	This report displays claim summary information. Meal counts by totals and reimbursement rates	Month/Year Claiming Method Types of Meals	Sponsor Site Manager	
Disallowed Meals Report	A list of the meals that were non-payable (over the daily claim limit) or disallowed for a calendar month. Includes the date, meal type, participant and the reason for the disallow.	Month/Year Detailed or Summary Types of Meals Status	Sponsor Site Manager	
Sponsored Claim Summary Report	This report displays sponsored claim summary information. Payable meals by totals and reimbursement rates.	Month/Year Claiming Method Type of Meal	Sponsor Site Manager	
 FINANCIAL REPORTS				
Expense Detail Report	This report helps you document expenses and categorizes them as CACFP, non-CACFP. It is linked to the information that you enter in the Expense part of My Food Program.	Date Range Include Receipts (optional)	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Expense Summary Report	This report sums up the costs for each expense type over the period of time selected.	Date Range	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Reimbursements by Calendar Year	Yearly summary of CACFP reimbursement for all sites.	Year	Sponsor Provider Kitchen Staff/ Infant Teacher	

REPORT NAME	DESCRIPTION	USER SELECTIONS	ACCESS LEVEL	SAMPLE REPORT
🍴 FOOD SERVICE OPERATIONS REPORTS				
Daily Meal Production Record	This report pulls all meal production records for each day onto one page. This report does not include substitutions for special dietary needs or a record of leftover/recycled food.	Date Range	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Daily Meal Production with Leftovers and Dietary Accommodations	Detailed meal production report that includes documentation of use of leftover/recycled food and meal substitutions for special dietary needs. It contains all the information on the Texas Department of Agriculture form H1530.	Date Range Meal	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Delivery Receipt Report	Menu and food production information is pre-populated on this form. It is designed to be printed and sent with vended meal providers and used to document food temperatures and signatures.	Date	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Food Production Report	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.	Date Range	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Food Production Spreadsheet with Meal Pattern	This is an output of the food production information entered in the menu screen as a spreadsheet.	Date Range	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Food Shortage Report	This is an output of the food shortage information entered in the menu screen. It has the date, meal type, actual meal count and the amount prepared and amount required for each menu item.	Date Range All Meals OR Only Meals with Food Shortage	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Food Temperature Report	This reports shows the food temperatures entered for the select time period.	Month/Year	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Grocery List Report	This report displays the estimated milk and food needed for a given date range based on participant schedules.	Date Range	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Milk Purchased Report	This report displays the milk purchased per type. Shows totals for day, week, and month.	Date Range	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Milk Served By Type Totals Report	This report displays estimated milk used in gallons per type based on meal attendance. Shows totals for day, week, and month.	Date Range	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Special Diet Report	A list of special diet form records for all participants.	N/A	Sponsor Provider Kitchen Staff/ Infant Teacher	

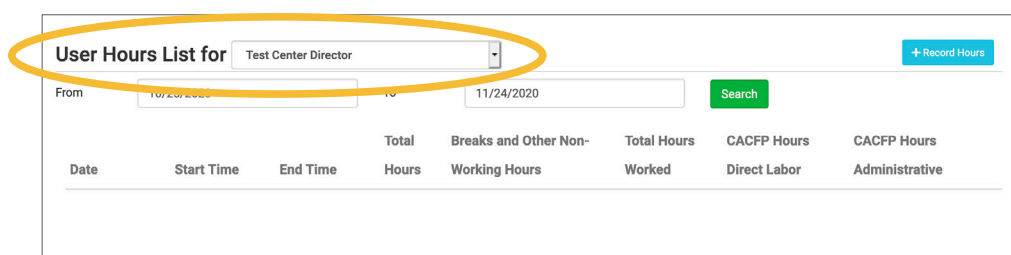
REPORT NAME	DESCRIPTION	USER SELECTIONS	ACCESS LEVEL	SAMPLE REPORT
 PARTICIPANT REPORTS				
Enrollment Roster	Enrollment information for enrolled participants within a date range.	Month/Year	Sponsor Provider	
Participant Export Report	Generates a csv file of all participant attributes.	Active or All Participants	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Special Diet Report	A list of special diet form records for all participants.	N/A	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
 RECORDKEEPING REPORTS				
Bulk Enrollment Form Report	Generates one pdf with a enrollment form for each household with an expired or missing enrollment or income form.	Expired.Missing Enrollment AND/OR Income Forms	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Daily Menu Attendance and Meal Count Sheet	Generates daily menu attendance and meal count PDF.	N/A	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
Site Summary Report	This report shows information about the site, the participants and their schedule, user training from current fiscal year, and site visits.	N/A	Sponsor Site Manager Kitchen Staff/ Infant Teacher	
 STAFF REPORTS				
Staff Active/Inactive Report	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.	Date Range	Sponsor Site Manager	
Staff Hours Detail Report	Detail of staff hours for a selectable period of time.	Date Range	Sponsor Site Manager	
Staff Training Report	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.	Date Range	Sponsor Site Manager	

Record Hours

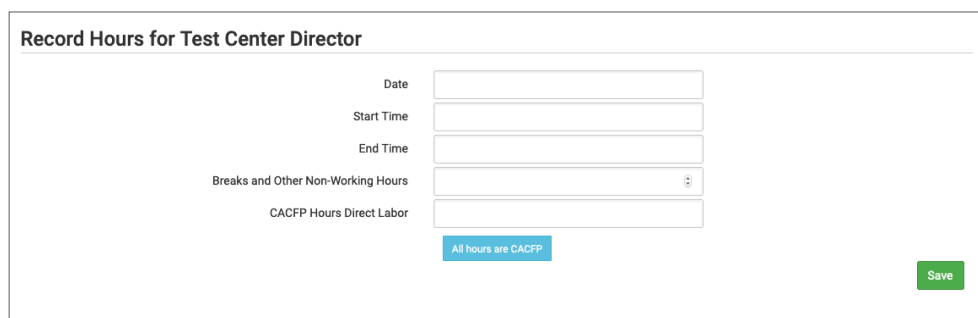
You are able to record staff hours within My Food Program for the purpose of demonstrating a nonprofit meal service.

To record hours:

- Before you can record hours, you must assign an hourly wage. You can find this by clicking “Staff” from the dashboard and entering it under User Details.
- Click on “Record Hours” from the main dashboard.
- Select the User you would like to record hours for from the dropdown menu.
- Click the blue “Record Hours” button on the upper-right corner.
- Enter the information into the fields:
 - Date
 - Start Time
 - End Time
 - Breaks and Other Non-Working Hours
 - CACFP Hours Direct Labor (examples include taking meal counts, grocery shopping, etc.)
 - “All Hours are CACFP Button”: for those staff that have only CACFP-related duties (for example, food service staff), click here to allocate all working hours as CACFP.
 - Note: Self-sponsored sites will have the ability to records CACFP Admin Hours (examples include preparing claims, household income statements, etc.)
- Click “Save”.



The screenshot shows a dropdown menu titled "User Hours List for" with "Test Center Director" selected. Below the dropdown, there are fields for "From" (10/20/2019) and "To" (11/24/2020), a "Search" button, and a "+ Record Hours" button. Below these fields is a table with the following columns: Date, Start Time, End Time, Total Hours, Breaks and Other Non-Working Hours, Total Hours Worked, CACFP Hours Direct Labor, and CACFP Hours Administrative.



The screenshot shows the "Record Hours for Test Center Director" form. It includes fields for Date, Start Time, End Time, Breaks and Other Non-Working Hours, and CACFP Hours Direct Labor. There is a blue button labeled "All hours are CACFP" and a green "Save" button.

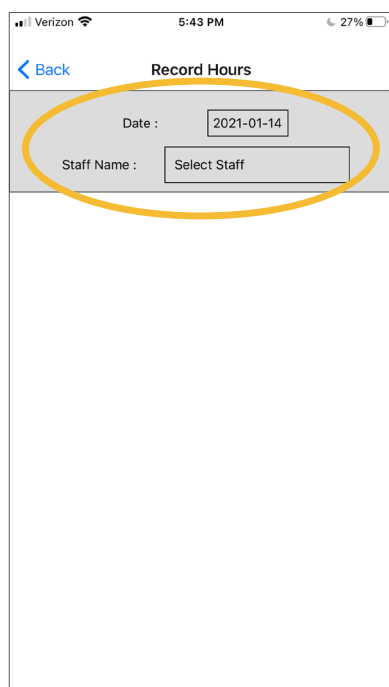
Notes:

- Site Manager/Directors will have the option to record hours for other users. Staff and Kitchen Staff/Infant Teachers will only be able to record hours for themselves.
- The information saved here will feed into the *Staff Hours Detail Report*.

You are able to record staff hours within My Food Program for the purpose of demonstrating a nonprofit meal service.

To record hours on mobile app:

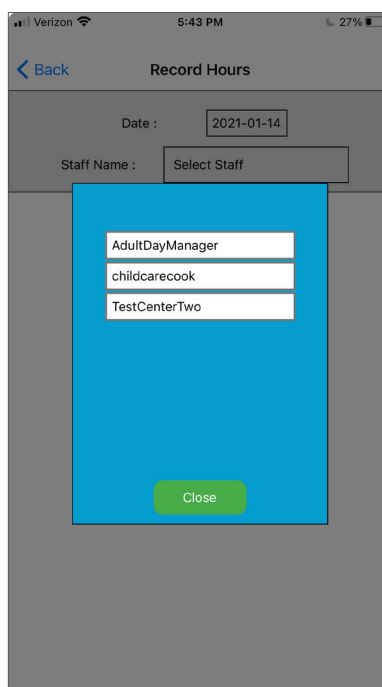
- Click on “Record Hours” from the main dashboard.
- Select the date you would like to record hours for.
- Select the Staff you would like to record hours for from the dropdown menu.
- Enter the information into the fields:
 - Start Time
 - End Time
 - Non-Working Hours
 - CACFP Hours Direct Labor (examples include taking meal counts, grocery shopping, etc.)
 - Note: Self-sponsored sites will have the ability to records CACFP Admin Hours (examples include preparing claims, household income statements, etc.)
- Click “Submit”.



Record Hours

Date : 2021-01-14

Staff Name : Select Staff



Record Hours

Date : 2021-01-14

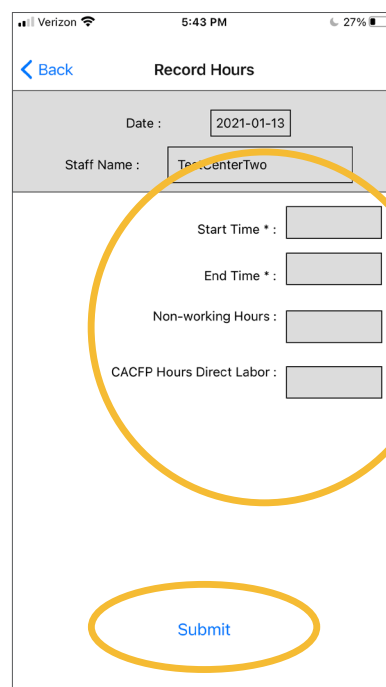
Staff Name : Select Staff

AdultDayManager

childcarecook

TestCenterTwo

Close



Record Hours

Date : 2021-01-13

Staff Name : TestCenterTwo

Start Time * :

End Time * :

Non-working Hours :

CACFP Hours Direct Labor :

Submit

Notes:

- Site Manager/Directors will have the option to record hours for other users. Staff and Kitchen Staff/Infant Teachers will only be able to record hours for themselves.
- The information saved here will feed into the *Staff Hours Detail Report*.

Visits

Visits: Adding a New Visit using Web 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 **Electronic Visits through the Web 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 and then click the blue “Add Visit” in the upper-right corner.
- Enter the fields:
 - **Manual/Electronic (required)**: select “Electronic”
 - **Visit Date (required)**
 - **Type**: select from:
 - 28-day follow-up
 - Regular Monitoring
 - Regular Monitoring – 1st Tri
 - Regular Monitoring – 2nd Tri
 - Regular Monitoring – 3rd Tri
 - Weekend Visit
 - CAP follow-up
 - Other
 - Site audit
 - Desk Audit
 - Preoperational/Intro Visit
 - **Electronic Forms**: select from Preoperational/Approval Visit OR Review Visit Form.
 - **Visit Announced**: check if the site was notified of the visit ahead of time.
 - **Meal Observed**: select from Breakfast, AM Snack, Lunch, PM Snack, Dinner, Evening Snack
 - **Follow-Up Required**: check if a follow-up is required.
 - **Not Home**: check if provider was not home.
- Click “Save” in order to display the link to the electronic review form.
- Click the blue “Open Electronic Form button” and complete the form. You will not be able to submit until all required questions have been answered and the form has been signed by both the monitor and center.
- You will be able to see all attachments and audits on this page as well.

Site Visit

Manual / Electronic

electronic

Visit Date

Visit Type

Select

Electronic Forms

Select

☐ Visit Announced

Meal Observed

None

☐ Follow-up Required

☐ Not Home

Attachments

Photo

Delete

Add Attachment

File limit is 10MB

Save

Audits

Start Date	End Date	Status	Report
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Manual / Electronic

electronic

Visit Date

04/06/2021

Type

Regular monitoring

Electronic Forms

Review Visit Form

☐ Visit Announced

Meal Observed

None

☐ Follow-up Required

☐ Not Home

Open Electronic Form

Visits: Adding a New Visit using a Paper Form



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 **Electronic Visits through the Web App.**
2. Using a **paper-form and scanning it into My Food Program.**

To add a new review visit using a paper form:

- Click on “Visits” on the main dashboard.
- Click the blue “Add Visit” in the upper-right corner.
- Enter the fields:
 - **Manual/Electronic (required):** select “Manual”
 - **Visit Date (required)**
 - **Type:** select from:
 - 28-day follow-up
 - Regular Monitoring
 - Regular Monitoring – 1st Tri
 - Regular Monitoring – 2nd Tri
 - Regular Monitoring – 3rd Tri
 - Weekend Visit
 - CAP follow-up
 - Other
 - Site audit
 - Desk Audit
 - Preoperational/Intro Visit
 - **Visit Announced:** check if the site was notified of the visit ahead of time.
 - **Meal Observed:** select from Breakfast, AM Snack, Lunch, PM Snack, Dinner, Evening Snack
 - **Follow-Up Required:** check if a follow-up is required.
 - **Not Home:** check if provider was not home.
 - **Upload Visit Form:** use the Browse button to find and select the form from your device.
- Click “Save”.
- You will be able to see all attachments and audits on this page as well.

Site Visit

Manual / Electronic

manual

Visit Date

Visit Type

Select

☐ Visit Announced

Meal Observed

None

☐ Follow-up Required

☐ Not Home

Upload Visit Form

Browse...

No file selected.

Current Form

File limit is 10MB
(No Image)

Attachments

Add Attachment

File limit is 10MB

Photo

Delete

Save

Audits

Start Date

End Date

Status

Report

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 by clicking on the blue “Audit Report” hyperlink at the bottom of the screen.

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.