

COLYAR CONSULTING GROUP, INC.

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Child Nutrition Programs

Summer Food Service Program

# User Manual

**Nebraska Department of Education**

**Nutrition Services**

*For Sponsor Users*

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# Introduction

*Welcome to the Child Nutrition Program Electronic Application and Reimbursement System (CNP) user manual for the Summer Food Service Program module. CNP is a web-based software solution that provides administrators, state users, and Sponsors with efficient and immediate access to applications, claims, and related nutrition program functions.*

## Web Site Benefits and Features

CNP is a user-friendly web application that allows authorized users to submit and approve application, claims, and miscellaneous forms via the Internet, as their security rights permit. Key system features include:

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

## User Manual

This user manual is intended for use by authorized state users that administer the SFSP programs. It is designed to provide a general understanding of how to use the system in an effective and efficient manner. This manual will provide:

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

# 2

## Getting Started

Before you can begin using CNP, you must be assigned a user ID and password by the CNP Desk that provides the required security rights. Once this setup is complete, you may use the Internet and your assigned user ID and password to access and log onto the CNP web site.

## Accessing the Web Site

You can access CNP from any computer connected to the Internet by opening your Internet browser and entering the CNP URL in the browser's address line

<https://nutrition.education.ne.gov/Splash.aspx>



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

The screenshot shows the Nutrition Services CNP web site splash page. The header includes the text "Nutrition Services" with the phone number "Lincoln: 402-471-2488 - 800-731-2233" and the "CNP" logo with the Nebraska Department of Education logo. The main content area is divided into several sections: "Returning Users: Log On" with fields for "User ID:" and "Password:", a "Forgot Your Password?" link, a "Remember my User ID" checkbox, and a "Log On" button; "Links" with a list of navigation options including "Nutrition Services Home", "CACFP Online Application", "CACFP Online Claims", "NSLP Online Application", "Reimbursement Rates", and "Training Registration"; "Reimbursement Rates for Fiscal/School Year 2013-2014 announced" with a "Click here for rates" link and a "posted: 10 Jun2013" date; "Recalls.gov" with a brief description and a link to "www.recalls.gov"; "Current Program Year is 2014 (July 1, 2013 - June 30, 2014)"; and "NDE Disclaimer" with a detailed disclaimer text and a list of four bullet items. The footer includes the "CNP press" logo and the copyright notice "Copyright © 2014 Colyar Consulting Group".

Figure 1: CNP Home Page

## About the CNP Home Page

The CNP Home Page consists of three major sections:

- Bulletin Board.
- Log on.
- Links.

The bulletin board is managed by NDE and provides general information. It is important to remember that the bulletin board on the home page is viewable by the public.

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

The links section provides access to websites and additional information:

- Selecting the **SNP Program Resources** link will transfer the user to a webpage that provides additional information on the National School Lunch Program.
- Selecting the **CACFP Program Resources** link will transfer the user to a webpage that provides additional information on the Child and Adult Care Food Program.
- Selecting the **SFSP Program Resources** link will transfer the user to a webpage that provides additional information on the Summer Food Service Program.

## Logging On

### To log on

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

**Note:** If you do not have a User ID and Password, contact the CNP Desk.



**TIP:** The Password is case-sensitive, so be sure to use upper and lowercase letters, numeric and special characters.

## To change your password

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

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

**Note:** Security configuration settings require a password eight (8) characters in length. The password must contain at least one numeric, one uppercase and lowercase letter, and one special character (e.g., !, ?, /). Passwords are case sensitive.

## CNP Content Overview

Once you are logged in and have selected a Sponsor, the top portion of the CNP application contains key elements that provide basic information about your location within the system and the selected Sponsor.

Figure 2: CNP Content Overview

Item	Description
<b>Program Name</b>	The selected program name appears in the gray area at the top of the page.
<b>Menu Items</b>	Menu items display on the blue menu bar at the top of the page. Selecting a menu item will take you to its menu page. Users may not have access to all menu items. If you are unable to select a particular menu item, you do not have the necessary security rights. Contact the CNP Desk for assistance.
<b>Breadcrumb Trail</b>	The navigation, or breadcrumb trail, identifies your location within the web site. Selecting a specific portion of the trail will take you back to that particular screen.
<b>School Year</b>	The selected school year displays on the right beneath the menu bar. Upon logging in, the system defaults to the most current active school year.
<b>Information Box</b>	The information box displays general information regarding the Sponsor/ Site.
<b>Logout</b>	The logout button displays in the menu bar. It is recommended to select <b>Logout</b> to properly exit the system.

**Note:** For security reasons, the system will automatically log you out after twenty (20) minutes of inactivity.

## Screen Options

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



**Figure 3: Screen Options - example**

The following table describes each of the possible screen options:

Item	Description
<b>VIEW</b>	Presents the screen information in 'view-only' mode. In this mode, the user cannot modify any data.

Item	Description
<b>MODIFY</b>	Presents the screen in ‘modify’ mode. In this mode, the user can modify field data and save the data after pressing the save button at the bottom of the screen.
<b>DELETE</b>	Deletes the current record displayed on the screen. The user will be presented with a confirmation screen to validate that they intend to delete the record.
<b>INTERNAL USE ONLY</b>	This option is only available to authorized State users only. This is available for screens that have an Internal Use Only section, which is typically at the bottom portion of the screen. Selecting this option will result in the fields in the Internal Use Only section to become editable.

## CNP Programs Page

Once you successfully log on, the CNP Programs page is displayed. Actual access to specific modules is based on the user’s security rights.



**TIP:** The Accounting, Maintenance and Configuration, and Security tiles are always gray because these are administrative modules that are available to only authorized State users. Sponsors will not have access to these modules. Only select authorized State users will have access to these modules.



Figure 4: CNP Programs Page

Selecting this button...	Provides...
<b>School Nutrition Programs</b>	Access to the School Nutrition Programs home page
<b>Accounting</b>	Access to the Accounting Module home page
<b>Child and Adult Care Food Program</b>	Access to the Child and Adult Care Food Program home page
<b>Maintenance and Configuration</b>	Access to the Maintenance and Configuration module home page
<b>Summer Food Service Program</b>	Access to the Summer Food Service Program home page
<b>Security</b>	Access to the Security Module home page

## Summer Food Service Program Home Page

The Summer Food Service Program (SFSP) home page contains the message board used by state administrators to post and maintain Summer Food Service Program-related messages. Messages may contain important news regarding the submission due dates, upcoming training, legislative changes, or any other SFSP-specific information.

### To access the Summer Food Service Program home page

1. Log on to the CNP web site.
2. On the Programs screen, select **Summer Food Service Program**.

**Note:** If a user only has access to the Summer Food Service Program module, the Programs screen is not be displayed

3. The Summer Food Service Program home page displays.

**Note:** State administrators maintain the message boards for all CNP modules. If you would like a message posted on the Summer Food Service Program home page, please contact the CNP Desk. Please note that messages are visible to both internal and external users.



Figure 5: Summer Food Service Program Home Page

## Summer Food Service Program menu options

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

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

Menu Item	Menu Features
<b>Applications</b>	Access to overall application-related items including: <ul style="list-style-type: none"><li>▪ Sponsor Manager (State users only).</li><li>▪ Application Packet (inc. Sponsor and Site/Provider applications as well as supporting submissions).</li><li>▪ Advance Requests</li><li>▪ Advance Requests Manager</li><li>▪ Download Forms</li></ul>
<b>Claims</b>	<ul style="list-style-type: none"><li>▪ Access to SFSP claim entry screens</li><li>▪ Claim Rates</li><li>▪ Sponsor-specific payment history.</li></ul>
<b>Reports</b>	Access to a variety of standard SFSP reports (State users only).
<b>Security</b>	Access to an individual user's security-related items including: <ul style="list-style-type: none"><li>▪ Change Password (authenticated user changing their password).</li><li>▪ User Manager.</li></ul>
<b>Search</b>	<ul style="list-style-type: none"><li>▪ Access to SFSP Sponsor Search</li><li>▪ Access to SFSP Site Search</li><li>▪ Access to Status Summary Report</li></ul>

## Error Processing

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

### Input Edits

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

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

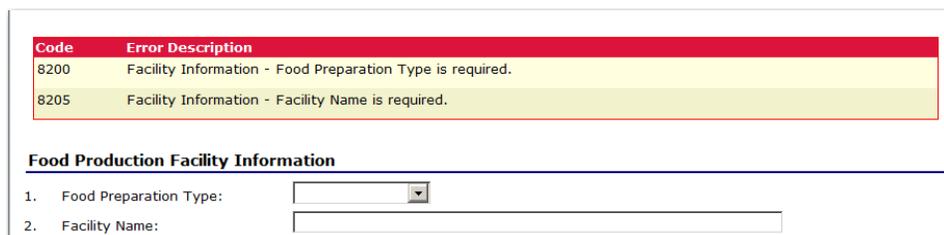
The screenshot shows a portion of a web form. At the top, there is a red header bar with the text "Input Errors" in white. Below this, a yellow box contains the error message "A) Value is required. Please re-enter." in red text. Underneath the error message is a white box with the text "Advance Date: Mar 2014". Below that is a certification statement with a checkbox and the text: "I certify that the information on this form is true and correct. I also certify that I am operating the number of sites for which my administrative budget was approved and that my projected administrative costs do not differ significantly from my approved budget. Furthermore, I also certify that prior to requesting this second advance, I have required all administrative and site personnel to complete training on all relevant SFSP responsibilities and procedures, and that I have records to document that this training was completed. I understand that deliberate misrepresentation or withholding of information may result in prosecution under applicable state and federal statutes." At the bottom of the form, there are two buttons: a red "Save" button and a grey "Cancel" button.

Figure 6: Examples of an Input Error (Partial Screen)

## Business Rule Edits

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

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



The screenshot shows a table of error messages at the top of a form. The table has two columns: 'Code' and 'Error Description'. Below the table is a section titled 'Food Production Facility Information' with two numbered fields: '1. Food Preparation Type:' with a dropdown menu and '2. Facility Name:' with a text input field.

Code	Error Description
8200	Facility Information - Food Preparation Type is required.
8205	Facility Information - Facility Name is required.

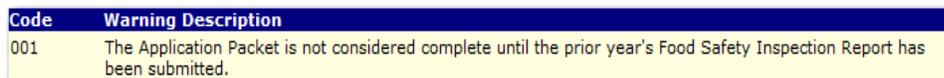
**Food Production Facility Information**

1. Food Preparation Type:

2. Facility Name:

**Figure 7: Example of a Business Rule Error (Partial Screen)**

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



The screenshot shows a table with two columns: 'Code' and 'Warning Description'. The table contains one row with a warning message.

Code	Warning Description
001	The Application Packet is not considered complete until the prior year's Food Safety Inspection Report has been submitted.

**Figure 8: Example of a Warning Error**

**Note:** State administrators maintain the business rule error messages.

## Selecting a Program Year

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

**Note:** A Sponsor will be unable to select a new year if they have not been granted the security right. Contact NDE to request access to the **Select Year** security right if you think this is in error.

### To select a program year

---

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

**Note:** The selected year is indicated by **Selected**.

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



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



Figure 9: Year Select screen

# Sponsor Search

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

For most SFSP functions, you must search for and select a Sponsor using the Sponsor Search function before beginning any task. When the Sponsor Search screen displays, you can search for the Sponsor using all or part of the Sponsor's ID, Name, or any other combination of parameters provided on this screen.

## To search for an Sponsor

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



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

**Search for Sponsors**

Agreement Number:	<input type="text"/>	Packet Status:	<input type="text"/>
Sponsor Name:	<input type="text"/>	Field Service Rep:	<input type="text"/>
FEIN:	<input type="text"/>	Packet Assigned To:	<input type="text"/>
County:	<input type="text"/>	Program Status:	<input type="text"/>
Sponsor Status:	<input type="text" value="Active"/>		

Search all available Programs

Figure 10: Sponsor Search screen

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

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

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

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

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

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

**Search for Sponsors**

---

Agreement Number:  Packet Status:

Sponsor Name:  Field Service Rep:

FEIN:  Packet Assigned To:

County:  Program Status:

Sponsor Status:

Search all available Programs

**Sponsors** **Found: 1277**

Agreement Number	Sponsor Name	SNP	SFSP	CACFP	Status
000000	Registration	✓		✓	Active
000001	ESU #1	✓			Active
000002	ESU #2	✓			Active

Figure 11: Sponsor Search screen – “Search all available Programs” example

## To add a new Sponsor

---

1. On the menu bar, select **Search**. The Search Options screen displays.
2. Select **Sponsor Search**. The Sponsor Search screen displays.
3. Perform a search to ensure that the Sponsor does not already exist in the system.
4. Select **Add New Sponsor** at the bottom of the screen results section. The Add New Sponsor screen displays.
5. Enter the Sponsor name and select **Search**. If CNP detects a Sponsor(s) within the database that has the same/similar name, it will display existing Sponsors in order to ensure that the user is not adding a duplicate Sponsor.
6. If the Sponsor that was to be added already exists and is displayed in the Search Results section, select the Sponsor name to transfer to the existing Sponsor Profile.
7. If the Sponsor does not exist in the database, select the **Add New Sponsor** link to transfer to a blank Sponsor Profile screen for data entry. Refer to the *Sponsor Profile* section.

**Search for Sponsors**

Agreement Number:  Packet Status:

Sponsor Name:  Field Service Rep:

FEIN:  Packet Assigned To:

County:  Program Status:

Sponsor Status:

Search all available Programs

---

**Sponsors** Found: 0

Agreement Number	Sponsor Name	Application Packet Status	Submitted for Approval	Approval Date	Packet Assigned To
No Sponsors found for this selection.					

[Add New Sponsor](#)

Figure 12: Add New Sponsor screen – Duplicate Search example

## Site Search

You can also search for and select a Site through the Site Search function on the Search menu.



**TIP:** Sites only display if they are associated with a Sponsor to which you have access.

You can search for the site using all or part of the Site ID, Site Name, License Number, or Street Address. At least one search criteria must be entered. The search results display in the Site List below the search criteria.

### To search for a site

1. On the menu bar, select **Search**.
2. Select **Site Search**.
3. Enter all or a portion of the Site ID, Site Name, Site Type, or Address in the respective text box (es).
4. Select **Search**.
5. Select the desired Site.

**SFSP Site Search**

**Search for Sites**

---

Site ID:

Site Name:

Site Type:

Street Address:

City:

State:  Zip Code:

Site Status:

**Figure 13: Site Search Page**

Parameter	Type of Search	Search Features
<b>Site ID</b>	“includes”	<ul style="list-style-type: none"> <li>▪ If in combination with the Site Name, the Site ID takes precedence</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>
<b>Site Name</b>	“includes”	<ul style="list-style-type: none"> <li>▪ If in combination with the Site ID, the Site ID takes precedence; this parameter is ignored</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>
<b>Site Type</b>	“exact”	<ul style="list-style-type: none"> <li>▪ If in combination with the Site ID, the Site ID takes precedence; this parameter is ignored</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>
<b>Street Address</b>  <b>City</b>  <b>State</b>  <b>Zip Code</b>	“includes”	<ul style="list-style-type: none"> <li>▪ If in combination with the Site ID, the search is performed using both the Site ID and this parameter</li> <li>▪ If in combination with any other parameter, all parameters are used to perform the search</li> </ul>

# 3

## Applications

Now that you know how to access and log on to CNP, the remainder of the manual will explore the functions of the Summer Food Service Program module. Let's first look at the Applications component of CNP, where users manage yearly enrollment of Sponsors and sites and submit/review Advance Requests.

### About the School Year Enrollment Process

In order to participate in the Summer Food Service Program, Sponsors must submit an Application Packet to the State for review and approval. Before beginning the Application Packet, Sponsors must select the "Add" action on the Application Packet screen. The user is then transferred to a blank SFSP Sponsor application screen. A new Application Packet must be submitted and approved for each program year. Once the Application Packet is approved, monthly claims for reimbursement may be submitted.

Packet Assigned To: unassigned			
Action	Form Name	Latest Version	Status
<a href="#">Add</a>	Sponsor Application		Not Started

Figure 14: Enrolling in a New Program Year

### Submitting an Application Packet

The Sponsor can submit the Application Packet to the State once the application is deemed complete by the system. In order to be able to submit an Application Packet, the packet must contain:

- A completed Sponsor Application with no errors.
- At least one completed SFSP Site Application with no errors.
- A completed Management Plan with no errors.
- A completed Budget Detail with no errors if the Sponsor: had not enrolled in the Summer Food Service Program in the previous year (i.e., "new" application) OR

- is identified as a Type of Agency of “Private Non Profit Sponsor” (i.e., on their Sponsor Profile).
- All items in the Checklist are identified as submitted to NDE.



**TIP:** Site Field Trip data can be entered ONLY for approved sites; hence they are usually not part of the initial Application Packet submission by the Sponsor.

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

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

**Figure 15: Packet History (sub-section of the Application Packet screen)**

## Applications Menu

The Applications menu is the starting point for all tasks related to the annual Summer Food Service Program enrollment process. Menu items are based on security levels.

### To access the Applications Menu

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

The following figure displays the complete list of Applications menu items for authorized state users. It is important to note that Sponsors have significantly fewer Applications menu items.

Item	Description
Sponsor Manager	SFSP Sponsor's Profile, Site and Hold Information
Application Packet	SFSP Applications Forms (Sponsor and Site)
Advance Requests	Request Sponsor's SFSP Advance(s) for the current year
Advance Requests Manager	Manage requested Sponsor's SFSP Advance(s) for the current year
Download Forms	Forms Available for Downloading

Figure 16: SFSP Applications Menu screen (State view)



**TIP:** Advance Requests Manager is State-only screens. Sponsors will not see these screens on their menu.

## Sponsor Manager Menu

The Sponsor Manager Menu allows authorized State users to access the Sponsor Profile, Site Manager, Batch Hold, and Payment Hold functions.

### To access the Sponsor Manager Menu

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Sponsor Manager**. If a Sponsor has already been selected, the Sponsor Manager Menu screen displays.  
If no Sponsor has been selected, use the Sponsor Search feature to search for and select a Sponsor.

Item	Description
Sponsor Profile	Specific information for the Sponsor.
Site Manager	Site List and Site Options for the Sponsor.
Batch Holds	Batch Hold Options for Enrolled Programs.
Payment Holds	Payment Hold Options for Enrolled Programs.

Figure 17: Sponsor Manager Menu screen

The following table describes the features available from the Sponsor Manager screen.

Item	Description
<b>Sponsor Profile</b>	Provides specific information for the Sponsor, including identification numbers, and program participation.
<b>Site Manager</b>	Provides access to the list of sites associated with the Sponsor and the ability to access a specific Site Profile
<b>Batch Holds</b>	Provides the ability to place a hold on all future claim month payments for a selected Sponsor. CNP will maintain submitted claim data, but will not process any payments for <u>all future claim months</u> until the batch hold is removed.

<b>Payment Holds</b>	<p>Provides the ability to place specific claim month payments on hold for a selected Sponsor. For the specific claim month(s), CNP will maintain submitted claim data, but will not process any payments <u>for these specific claim months</u> until the payment hold is removed.</p> <p>It is highly recommended that NDE use the Batch Hold feature; not the Payment Hold feature</p>
----------------------	---



**TIP:** It is more common to place a Batch Hold on a Sponsor rather than a Payment Hold. The Batch Hold will ensure no payments are issued; the Payment Hold will only ensure that claim payments for a specific month/year are not issued.

## Sponsor Profile

The Sponsor Profile provides general information on the Sponsor. The Sponsor Profile data is NOT year-specific. It provides general attribute information regarding the Sponsor such as name, Agreement Number, type of agency, and county.

All Sponsors must be initially registered through the Sponsor Profile screen before an Application Packet can be completed and any additional data can be added to the system. Furthermore, a Sponsor cannot be assigned a CNP User ID until the entity is defined in the system via the Sponsor Profile screen.

**Note:** State users also use the Sponsor Profile to specify whether the *Sponsor will report Sponsor level* or *Site level* claims. Once these preferences are set, they are in effect starting the following claim month. CNP functionality will not honor a change to claiming status (Sponsor reporting vs. Site reporting) within a claim month.

### To view or modify an Sponsor profile

1. On the Applications menu, select **Sponsor Manager**.
2. Search for and select a Sponsor using the Sponsor Search (if necessary).
3. Once a Sponsor has been selected, select **Sponsor Profile**.
4. Modify any desired information within the profile.
5. Select **Save**. If no errors exist, a confirmation screen displays.
6. Select **Edit** to return to the Sponsor Profile screen you just modified.  
-OR-  
Select **Finish** to return to the Sponsor Manager Menu.

## Sponsor Profile

### Sponsor Information

Agreement Number:

Sponsor Name:

Type of Agency:

FEIN:

County:

Congressional District:

DUNS Number:

Communication Preference:  Electronic  Paper

### Program Participation

Select the program(s) available to the Sponsor:

- School Nutrition Programs (SNP)  Summer Food Service Program (SFSP)
- Child and Adult Care Food Program (CACFP)

### Permanent Agreement Approved

Select the program(s) that NDE has an approved Permanent Agreement:

School Nutrition Programs (SNP)

- National School Lunch Program (NSLP)  Special Milk Program (SMP)
- School Breakfast Program (SBP)  Fresh Fruit and Vegetable Program (FFVP)
- Afterschool Care Program (ASCP)

Summer Food Service Program (SFSP)

- Summer Food Service Program (SFSP)

Child and Adult Care Food Program (CACFP)

- Adult Day Care (ADC)  Day Care Homes (DCH)
- Child Care Center (CCC)

### School Nutrition Program

Claims are reported by:  Sponsor  Site

One-Time Exception Used Date:

One-Time Exception Used Date (FFVP):

Agreement Type:

Region:

Payment Suffix:

State Supported Entity:

Address Book Number:

Field Service Representative:

SNP Specialist:

SNP Consultant:

**Summer Food Service Program**

---

Claims are reported by:  Sponsor  Site

One-Time Exception Used Date:

Agreement Type: School Food Authority (SFA) ▼

Region: ▼

Payment Suffix:

State Supported Entity: ▼

Address Book Number:

Field Service Representative: ▼

SFSP Specialist: ▼

SFSP Consultant: ▼

**Child and Adult Care Food Program (CACFP) - Centers**

---

Participating in the Centers Program

Claims are reported by:  Sponsor  Site

One-Time Exception Used Date:

Agreement Type: ▼

Region: ▼

Payment Suffix:

State Supported Entity: ▼

Address Book Number:

Field Service Representative: ▼

CACFP Specialist: ▼

CACFP Consultant: ▼

**Child and Adult Care Food Program (CACFP) - Family Day Care Home (FDCH)**

---

Participating in the Family Day Care Home Program

Claims are reported by:  Sponsor  Provider

One-Time Exception Used Date:

Region: ▼

Payment Suffix:

State Supported Entity: ▼

Address Book Number:

Field Service Representative: ▼

DCH Specialist: ▼

DCH Consultant: ▼

**Status**

---

Sponsor Status: Active ▼

Created By: cnp\_conversion on: 12/24/2013 6:17:25 AM Modified By: eShepherd on: 2/4/2014 8:34:56 AM

Figure 18: Sponsor Profile screen (partial)

## To delete an Sponsor profile

---

1. On the Applications menu, select **Sponsor Manager**.
2. Search for and select a Sponsor using the Sponsor Search (if necessary).
3. Once a Sponsor has been selected, select **Sponsor Profile**.
4. On the Edit menu, select **DELETE**. A warning displays.



**WARNING:** Once the profile has been deleted, it is permanently removed from the system and cannot be restored. You will not be able to access any data regarding the Sponsor within the system. **Use caution before deleting a profile.**

---

5. Select **Delete**. A confirmation screen displays.
6. Select **Finish** to return to the Sponsor Manager menu.



**TIP:** To retain history on a Sponsor, change their Status to Inactive instead of deleting the profile.

---

## Site Manager

The Site Manager enables you to view, modify, add, delete, and change the status of a Sponsor's site.

### To access Site Manager

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Sponsor Manager**. If a Sponsor has already been selected, the Sponsor Manager Menu screen displays.  
If no Sponsor has been selected, use the Sponsor Search to search for and select a Sponsor.
3. On the menu, select **Site Manager**. The Sponsor Site Manager screen displays.

### To create a new Sponsor site

---

1. On the menu bar, select **Applications**. The Applications menu displays.
2. Select **Sponsor Manager**. The Sponsor Options menu displays.
3. Select **Site Manager**. The Site Manager menu displays.
4. Select **Create New Site**. A blank Site Profile screen displays.
5. Enter data. The system will automatically generate the next available Site ID, but the ID can be overwritten if needed (i.e. for public and charter schools). Site ID must be unique within a

Sponsor. They are not unique across the system.

6. Select the check boxes for the programs in which the site participates.
7. Select **Save** to save the information on the site. The Sponsor Site Manager re-displays with the new site added.

**Site Profile**

---

**Site Information**

---

Site ID: 0001  
Site Name: Lincoln Elementary  
Building Number: 005  
County: Adams (001) ▼

**Program Participation**

---

Site will operate in the following programs:  
 SNP  SFSP  CACFP

**Status**

---

Site Status: Active ▼

Figure 19: Site Profile screen

## To view or modify a Site Profile

---

1. On the Applications menu, select **Sponsor Manager**. If a Sponsor has already been selected, the Sponsor Manager Menu screen displays.  
If no Sponsor has been selected, use the Sponsor Search to search for and select a Sponsor
2. Once a Sponsor has been selected, select **Site Manager**. The Sponsor Site Manager displays.
3. Select the site you wish to view or modify. The Site Profile screen displays.
4. Modify any desired information within the profile.
5. Select **Save**. A confirmation screen displays.
6. Select **Edit** to return to the Site Profile screen you just modified.  
-OR-  
Select **Finish** to return to the Sponsor Site Manager screen.

**Note:** By selecting program participation, the site will automatically appear on the respective program's site list within the Application Packet.

**Note:** Sponsors may also add sites via the 'Quick' Site Profile.

## Sponsor Site Manager

010018	Status: Active	
<b>Hastings Public Schools</b>		
No address on file for this year		
Site ID	Site Name	Status
0001	Lincoln Elementary	Active
0002	Alcott Elementary	Active
0003	Longfellow Elementary	Active
0004	Morton Elementary	Active
0005	Watson Elementary	Active

Figure 20: Sponsor Site Manager screen

### To delete an Sponsor site

1. On the Applications menu, select **Sponsor Manager**. If a Sponsor has already been selected, the Sponsor Manager Menu screen displays.  
If no Sponsor has been selected, use the Sponsor Search to search for and select a Sponsor.
2. Once a Sponsor has been selected, select **Site Manager**.
3. Select the site you wish to delete.
4. Selected **DELETE** on the Edit menu in the top-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.



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

7. Select **Finish** to return to the Sponsor Site Manager screen.

## Batch Holds

The Batch Holds feature enables authorized state users to issue or view payment holds for a Sponsor, by program. Sponsors can still enter claims when a batch hold is in place; however, no payments will be issued by the system for the selected program until the hold is removed.

### To view or modify a Batch Hold

1. On the Applications menu, select **Sponsor Manager**. If necessary, search for and select a Sponsor.
2. Once a Sponsor has been selected, select **Batch Holds**. The Batch Holds screen displays.

3. Make any desired modifications.
  4. Select **Save**. A confirmation screen displays.
  5. Select **Edit** to return to the Batch Holds screen you just modified.
- OR-
- Select **Finish** to return to the Sponsor Manager Menu screen.



**TIP:** The Batch Hold Change History provides information on when batch holds were placed and removed and the reason for the hold.

**Summer Food Service Program Options**

---

Batch Hold  All Months

Reason Code

---

Save Cancel

**Batch Hold Change History**

Change	Change Date/Time	User
Summer Food Service Program Batch Hold was added due to Review	4/20/2011 2:42:42 AM	Developer

**Figure 21: Batch Holds screen**

### To remove a Batch Hold

1. On the Applications menu, select **Sponsor Manager**. If necessary, search for and select a Sponsor.
  2. Once a Sponsor has been selected, select **Batch Holds**. The Batch Holds screen displays.
  3. Uncheck the **All Months** checkbox.
  4. Select the blank space from the drop-down menu for the **Reason Code**.
  5. Select **Save**. A confirmation screen displays.
  6. Select **Edit** to return to the Batch Holds screen you just modified.
- OR-
- Select **Finish** to return to the Sponsor Manager Menu screen.

## Payment Holds

The Payment Holds feature enables authorized state users to issue or view payment holds on a Sponsor for a specific month/year, by program. Sponsors can still enter claims when a payment hold is in place; however, a payment will not be issued by the system for the selected month/year and program until the hold is removed.

## To view or modify a Payment Hold

1. On the Applications menu, select **Sponsor Manager**. If necessary, search for and select a Sponsor.
2. Once a Sponsor has been selected, select **Payment Holds**. The Payment Holds screen displays.
3. Make any desired modifications.
4. Select **Save**. A confirmation screen displays.
5. Select **Edit** to return to the Payment Holds screen you just modified.  
-OR-  
Select **Finish** to return to the Sponsor Manager Menu screen.



**TIP:** The Payment Hold Change History provides information on when payment holds were placed and removed and the reason for the hold.

**Summer Food Service Program Options**

Payment Hold (Check all that apply)  All  10/2011  11/2011  12/2011  1/2012  2/2012  3/2012  
 4/2012  5/2012  6/2012  7/2012  8/2012  9/2012

Reason Code

**Payment Hold Change History**

Change	Change Date/Time	User
Summer Food Service Program Payment Hold was added due to Claim Validation for: 7/2012.	4/20/2011 3:01:38 AM	Developer

Figure 22: Payment Holds screen

## To remove a Payment Hold

1. On the Applications menu, select **Sponsor Manager**. If necessary, search for and select a Sponsor.
2. Once a Sponsor has been selected, select **Payment Holds**. The Payment Holds screen displays.
3. Uncheck each checked month checkbox.
4. Select the blank space from the drop-down menu for the **Reason Code**.
5. Select **Save**. A confirmation screen displays.
6. Select **Edit** to return to the Payment Holds screen you just modified.  
-OR-  
Select **Finish** to return to the Sponsor Manager Menu screen.

# Application Packet

In order to participate in the Summer Food Service Program (SFSP), Sponsors must submit an Application Packet to the State for review and approval. At the beginning of each program year, Sponsor data is rolled over and must be verified by Sponsors prior to submitting any claims.

The Application Packet contains the Sponsor application, site application(s), and other forms required as a part of the packet. After selecting Application Packet from the Applications menu, each required packet item and its status displays. If any packet item requires attention (such as an error within a form or a checklist item needs to be completed), a red arrow displays next to the Application Packet item. If the Application Packet item has been completed correctly and contains no errors, a green check displays next to the Application Packet item. For more details, see *Reviewing an Application*.

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

**Note:** Once an Application Packet has been approved, if a Sponsor revises an item within the Application Packet (excluding the Site Field Trip), the Application Packet must be re-submitted for approval. Modifications to the Site Field Trip screen do not initiate the Application Packet approval process.

## To access the Application Packet

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

Packet Assigned To: unassigned			
Action	Form Name	Latest Version	Status
View   Revise	✓ Sponsor Application	Rev. 1	Approved
View   Revise	✓ Budget Detail	Rev. 1	Approved
Details	✓ Management Plan	Original	Approved
Details	✓ Food Production Facility List (1)		
Details	➔ Site Field Trip List (2)		
Details	✓ Checklist Summary (3)		
Details	Application Packet Notes		

Site Applications	Approved	Pending	Return for Correction	Denied	Withdrawn/ Closed	Error	Total Applications
Summer Food Service Program	1	0	0	0	0	0	1

Figure 23: Application Packet screen

If the Application Packet is under review by the State, it becomes “read only” to the Sponsor. The Application Packet screen is displayed with the following message to help make the Sponsor aware that they can no longer modify the submitted packet during this time.

**The Application Packet is currently under review by the State and is unavailable for changes.**

Figure 24: Application Packet screen – Message

## To assign an Application Packet

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. If necessary, search for and select a Sponsor. The Application Packet screen displays.
3. Select the **Packet Assigned To** link. The Application Packet Assignment screen displays.
4. Select the staff consultant to assign the packet.
5. Select **Save**. A confirmation message is displayed.
6. Select **Edit** to return to the Application Packet Assignment screen you just modified.  
-OR-  
Select **Finish** to return to the Application Packet screen.

## To end an Sponsor's enrollment

---

1. From the Applications menu, select **Application Packet**. If necessary, search for and select a Sponsor. The Application Packet screen displays.
2. Select the link under the **Latest Version** column. The Application History screen is displayed.
3. Select **Close Sponsor**. The End Sponsor Agreement screen is displayed.
4. Enter the **Closed/Terminated Date**. When this Sponsor enters claims, the Days on Operation fields will edit check with this date to ensure meals aren't claimed after the entered date.
5. Select the **Closed/Terminated Code**.
6. Enter the **Closed/Terminated Reason**.
7. If desired, provide a description as to why the Sponsor is ending enrollment in **Closed/Terminated Comment**.
8. Select **Save**. The Application History screen is displayed with a message stating that the Sponsor's enrollment has ended.

## To re-open a closed Sponsor

---

1. From the Applications menu, select **Application Packet**. If necessary, search for and select a Sponsor. The Application Packet screen displays.
2. Select the link under the Latest Version column. The Application History screen is displayed.

3. Select **Re-Open Sponsor**. The End Sponsor Agreement screen is displayed.
4. Delete the **Closed/Terminated Date**.
5. Select the blank space from the drop-down menu for the **Closed/Terminated Code**.
6. Delete the **Closed/Terminated Reason**.
7. Delete the **Closed/Terminated Description**.
8. Once all fields are blank, select **Save**. The Application History screen is displayed.

## Sponsor Application

The Sponsor Application screen provides access to the Sponsor's annual application for the Summer Food Service Program. The Sponsor is required to complete a new Sponsor application annually; however, if an application is contained within the system from the previous year, **the State** has identified select application data that rolls over from the previous year and pre-fills a new year's application.

### To view an Sponsor application (Original)

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
3. Select View next to the **Sponsor Application** packet item. The Sponsor Application for the designated school year is displayed.

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

### To view an Sponsor application (Revision)

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



---

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

---

## To add an Sponsor application (New Sponsor)

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select Add next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.
4. Enter required information.
5. Select **Save**. A confirmation screen displays.
6. Select **Edit** to return to the Sponsor Application screen.  
-OR-  
Select **Finish** to return to the Application Packet screen.



---

**TIP:** The Add option only appears for new Sponsors. If a Sponsor had an application in the previous year and has elected to enroll in the new year, the prior year's application information is rolled over into the new year's application as a starting point. The user would select **Modify** to review and update this information.

---

## To modify an Sponsor application

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select Modify next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **Edit** to return to the Sponsor Application screen.  
-OR-  
Select **Finish** to return to the Application Packet screen.



---

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

---

## To delete an Sponsor application

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select Modify next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.
4. Select **DELETE** on the Edit menu in the top-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.



---

**WARNING:** A Sponsor application can only be deleted if the Sponsor has not yet submitted any claims for the program year.

Once the application has been deleted, it is permanently removed and cannot be restored. Use caution before deleting an application.

---

## To revise an Sponsor application

---

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

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



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

## Site Applications – Summer Food Service Program

Sponsors must complete a Site Application for each of their sites. The Site Application screen provides access to the Site’s annual application for the Summer Food Service Program for both new and renewing sites. Sites must complete a new application annually; however, if an application is contained within the system from the previous year, **the State** has identified select application data that rolls over from the previous year and pre-fills a new year’s application.

### To access the Sponsor’s site list

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The most current year’s Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.

Action	Site ID / Site Name	Version / Status
View   Modify Admin	0001 Lincoln Elementary	Original /
<a href="#">Add Site Application</a>		

Figure 25: Application Packet – SFSP Site List screen

### To add a new site (only available to Sponsors)

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The most current year’s Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. At the bottom of the site list, select **Add Site Application**. The SFSP Available Site(s) screen displays.

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

5. If the site you would like to add an application for is listed, select the site. If the site you would like to add an application for is not listed, select **Add New Site**. The ‘Quick’ Site Profile screen displays.

- The system automatically defaults the Site ID to the next available ID for this Sponsor.



**TIP:** For most Sponsors, it is highly recommended that you use the Site ID assigned by the system. The system has verified that the assigned ID is unique and is the next available Site ID for the Sponsor.

- Enter the Site Name and County.
- Select **Save**. The Site Application for the new site is displayed.

Site Information	
Site ID:	<input type="text" value="0214"/>
Site Name:	<input type="text"/>
County:	<input type="text"/>

Figure 26: 'Quick' Site Profile screen

## To view a Site Application

- On the blue menu bar, select **Applications**.
- From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
- Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
- Select View next to the site whose application you would like to view. The site's Site Application is displayed.

## To modify a Site Application

- On the blue menu bar, select **Applications**.
- From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
- Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
- Select Modify next to the site whose application you would like to view. The site's Site Application is displayed.
- Modify any desired information.
- Select **Save**. A confirmation screen displays.
- Select **Edit** to return to the Site Application screen.  
-OR-

Select **Finish** to return to the SFSP Site List screen.

8. Repeat **Steps** 4 through 7 for each site that will participate in the program.

## To delete a Site Application

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. Select **Modify** next to the site whose application you would like to delete. The site's Site Application is displayed.
5. Select **DELETE** on the Edit menu in the top-right corner.
6. The system transfers you to the bottom of the screen and a warning message is displayed.
7. Select the **Delete** button at the bottom of the page. A confirmation message displays.



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

## To revise a Site Application

**Note:** Only state-approved applications can be revised. An application that has been submitted BUT is currently under review by the State CANNOT be revised.

Once a Sponsor revises any item within the Application Packet, the Application Packet must be re-submitted and the state review and approval process starts again.

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

Select **Finish** to return to the SFSP Site List screen.



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

## Closing a Site

A site may be closed within the system, whereby applications cannot be submitted for the **site**.

### To close a Site

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. Select the link under the **Latest Version** column. The Site Application History screen is displayed.
5. Select **Close Site**. The End Site Agreement screen is displayed.
6. Enter the **Closed/Terminated Date**. If the Sponsor is entering site level claims, the Days of Operation fields for this site will edit check with this date to ensure meals aren't claimed after the entered date.
7. Select the **Closed/Terminated Code**.
8. Enter the **Closed/Terminated Reason**.
9. If desired, provide a description as to why the site is being closed in the **Closed/Terminated Comment**.
10. Select **Save**. The Site Application History screen is displayed with a message stating that the site's enrollment is closed.

**The Site's enrollment was closed/terminated as of: 01/30/2011.**

Effective Claim Period	Version	Status	Approved Date
Jul 2010	Rev. 1	Not Submitted	
Jul 2010	Original	Approved	01/27/2011

Figure 27: Example of a Confirmation of a Closed Site

## To re-open a closed Site

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. Select the link under the Latest Version column. The Site Application History screen is displayed.
5. Select **Re-Open Site**. The End Site Agreement screen is displayed.
6. Delete the **Closed/Terminated Date**.
7. Select the blank space from the drop-down menu for the **Closed/Terminated Code**.
8. Delete the **Closed/Terminated Reason**.
9. Delete the **Closed/Terminated Description**.
10. Once all fields are blank, select **Save**. The Site Application History screen is displayed.

## Food Production Facility

The Food Production Facility section of the Application Packet contains information about each food production facility that the Sponsor will use to provide meals to its sites.

## To access the Food Production Facility List

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list screen displays.

### Food Production Facility

010018    Status: Active  
**Hastings Public Schools**  
No address on file for this year

Facility Name	Status	Approved Date
Facility Name	Approved	02/20/2014

[< Back](#)   [Add Facility](#)

Figure 28: Food Production Facilities list screen

## To add a Food Production Facility

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list screen displays.
4. Select the **Add Facility** button. A blank Food Production Facility screen for the specified year is displayed.
5. Complete the form.
6. Select **Save**. A confirmation screen displays.
7. Select **Edit** to return to the Food Production Facility screen.  
-OR-  
Select **Finish** to return to the Food Production Facilities list screen.

## To modify a Food Production Facility

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list screen displays.
4. Select the facility you want to modify. The Food Production Facility screen displays.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **Edit** to return to the Food Production Facility screen.  
-OR-  
Select **Finish** to return to the Food Production Facilities list screen.

## To delete a Food Production Facility

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list

screen displays.

4. Select the facility you want to delete. The Food Production Facility screen displays.
5. Select **DELETE** on the Edit menu in the top-right corner. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.



---

**WARNING:** Once the facility has been deleted, it is permanently removed and cannot be restored. Use caution before deleting a contract.

---

## Site Field Trip

The Site Field Trip section of the Application Packet contains information about any field trips that an approved site will conduct for the specified year. Note: Only approved sites can be associated with a Site Field Trip. Therefore, an initial review of an Application Packet will not include Site Field Trip forms because the State has not yet approved any sites.

### To access the Site Field Trip List

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.

Site	Field Trip Name	Date	Status
Sample County High School	American History Field Trip	7/3/2014	Submitted

Figure 29: Site Field Trip list screen



---

**TIP:** A field trip can be added ONLY for approved SFSP sites (i.e., an approved SFSP site application for the designated year).

---

### To add a Site Field Trip

---

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

displays.

3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
4. Select the **Create New Field Trip** button. A blank Site Field Trip screen for the specified year is displayed.
5. Select the Sponsor’s Site that will conduct the field trip.
6. Select the **Continue** button. The Site Field Trip screen is re-displayed with the selected site at the top of the page and field trip fields required for completion.
7. Complete the form.
8. Select **Save**. A confirmation screen displays.
9. Select **Edit** to return to the Site Field Trip screen.  
-OR-  
Select **Finish** to return to the Field Trip – Site List screen.

### To modify a Site Field Trip

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
4. Select the field trip you want to modify. The Site Field Trip screen displays.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **Edit** to return to the Site Field Trip screen.  
-OR-  
Select **Finish** to return to the Field Trip – Site List screen.

### To cancel a Site Field Trip

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
4. Select the field trip you want to cancel. The Site Field Trip screen displays.
5. Check the box in question 6 “Cancel Request”.
6. Select **Save**. A confirmation screen displays.

7. Select **Edit** to return to the Site Field Trip screen.  
-OR-  
Select **Finish** to return to the Field Trip – Site List screen.



---

**TIP:** Only approved field trips can be cancelled. If the field trip is not approved, but it will no longer occur, use the Delete feature.

---



---

**WARNING:** A cancelled field trip cannot be “un-cancelled”. If the Sponsor decides to re-instate the field trip, a new field trip must be added.

---

## To delete a Site Field Trip

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
4. Select the field trip you want to delete. The Site Field Trip screen displays.
5. Select **DELETE** on the Edit menu in the top-right corner. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.



---

**TIP:** A field trip cannot be deleted once it is approved. If the field trip will not occur, see the “To cancel a Site Field Trip” section.

---



---

**WARNING:** Once the field trip has been deleted, it is permanently removed and cannot be restored. Use caution before deleting a field trip.

---

## Budget Detail

The Budget Detail screen must be completed by Sponsors that:

- had not enrolled in the Summer Food Service Program in the previous year (i.e., “new” application) OR
- o is identified as a Type of Agency of “Private Non Profit Sponsor” (i.e., on their Sponsor Profile).

In these instances, the system will not allow an Application Packet to be submitted without completion of the Budget Detail screen, with no errors.

In addition, the Budget Detail must be completed if an Advance Request is submitted; however, the submission of an Advance Request occurs outside of the system’s Application Packet sub-module and

therefore must be manually validated by the State.

Once a Budget is approved, a revision (i.e., a new version) must be created.

## To access the Budget Detail

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **View** next to **Budget Detail**. The most current Budget Detail screen displays.

**Note:** If there are multiple versions of a budget within the system (i.e., revisions exist), the system defaults to the most current version.

## To add a Budget Detail

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Add** next to **Budget Detail**. A blank Budget Detail screen displays.
4. Complete the form.
5. Select **Save**. A confirmation screen displays.
6. Select **Edit** to return to the Budget Detail screen.  
-OR-  
Select **Finish** to return to the Application Packet screen.

## To view a Budget Detail

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. To view the most current Budget Detail, select **View** next to Budget Detail. The Budget Detail screen displays.

-OR-

To view a prior Budget Detail, select the revision link under the **Latest Version** column. The Sponsor Budget History for the designated school year is displayed.

Version	Status	Approved Date
Revision 1	Pending Validation	
Original	Approved	04/21/2011

Figure 30: Sponsor Budget History screen

4. Select the budget version you would like to view.

### To modify a Budget Detail

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Modify** next to **Budget Detail**. The Budget Detail screen displays with the most current, un-submitted budget data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **Edit** to return to the Budget Detail screen.  
-OR-  
Select **Finish** to return to the Application Packet screen.

### To revise a Budget Detail

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Revise** next to **Budget Detail**. The Budget Detail screen displays with the most current budget data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **Edit** to return to the Budget Detail screen.  
-OR-  
Select **Finish** to return to the Application Packet screen.



**TIP:** When creating a revision, the system maintains the previously-approved budget that can be accessed via the Sponsor Budget History screen.

## Checklist

---

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

## To access a Checklist

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

SFSP Checklist Summary			
010018 Status: Active <b>Hastings Public Schools</b> No address on file for this year			
Sponsor	Total Items	Submitted Items	Approved Items
Hastings Public Schools	1	0	0
Summer Food Service Program Sites	Total Items	Submitted Items	Approved Items
Lincoln Elementary	0	0	0

Figure 31: Checklist Summary screen

## To view a Checklist

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

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

SFSP Checklist						
010018 Status: Active <b>Hastings Public Schools</b> No address on file for this year						
Required Forms/Documents to submit to NDE	Document Submitted to NDE	Date Submitted to NDE	Document on File w/NDE	Status	Status Date	Last Updated By
SFSP Permanent Agreement		<input type="text"/>	<input type="checkbox"/>	Pending Approval	03/13/2014	Developer
Action	Checklist Item	Comment	Attachment	Date/Time		
There are no attachments						

Figure 32: Checklist screen (partial screen)

## To update a Checklist

---

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

## To upload an attachment to a Checklist item

---

**Note:** If the checklist item has a paper clip icon next to it, you can upload an attachment. Files in the following formats can be uploaded: .doc, .xls, .pdf, and .jpg.

1. Select the paper clip. The Checklist File Upload Details screen displays.
2. Use the **Browse** button to select the file to upload. If desired, enter a brief comment (field is not required)
3. Select **Save**.



Figure 33: Checklist File Upload Detail screen

## Notes

The Application Packet Notes screen allows state users to read and add notes regarding an entire

Application Packet. This enables state users to efficiently communicate and log information pertaining to an Application Packet. Comments regarding a specific Application Packet item can be entered in the Internal Comments field in the Internal Use Only section of the respective screen.

## To access application notes

---

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

**Note:** The Notes feature is only accessible for State users. Sponsors do not have access to the Notes menu option and, therefore, will not be able to access any notes that were entered.

## To view an application note

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select Details next to **Application Packet Notes**. The Application Packet Notes screen displays.

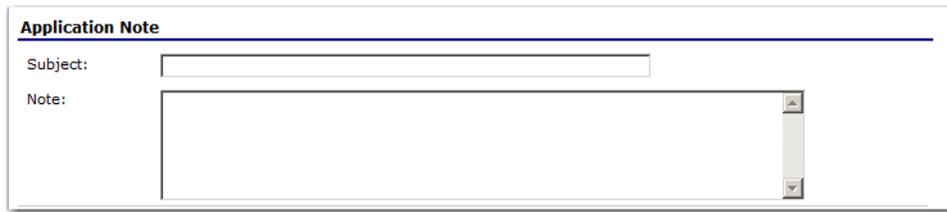
**Note:** Notes can only be modified or deleted by the user that created it. For all other users reading another user's note, the note will be **View Only**.

## To create a new application note

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select Details next to **Application Packet Notes**. The Application Packet Notes screen displays.
4. Select the **Create a New Application Note** button. The Application Packet Note screen displays.
5. Enter the **Subject**.
6. Enter the **Note**.
7. Select **Save**. A confirmation screen displays.
8. Select **Edit** to return to the Application Note screen.  
-OR-

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



**Figure 34: Application Note screen**



---

**TIP:** Once the Create New Application Note button is selected, a blank record is created and displayed on the Application Note screen. Even if you do not enter a note and select the Cancel button, the blank application note will remain and be listed on the Application Notes screen.

To remove the blank note created in error, select it and use the **DELETE** option at the top right of the Application Note screen. To enter information in the blank note, select the note and update the Subject and Note fields on the Application Note screen.

---

## To delete an application note

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Application Packet Notes**. The Application Packet Notes screen displays.
4. Under Date, select the date of the note you wish to delete. The Application Note screen displays.
5. Select **DELETE** on the Edit menu in the top-right corner.
6. The system transfers you to the bottom of the screen and a warning message is displayed.
7. Select the **Delete** button at the bottom of the page. A confirmation message displays.
8. Select **Finish** to return to the Application Notes screen.



---

**WARNING:** Notes can only be modified or deleted by the user that created it. For all other users reading another user's note, the note will be **View Only**. Selecting the button permanently deletes the Application Note from the application and it will not be recoverable once deleted.

---

## Advance Requests (Sponsor needs to be approved)

Sponsors use the Advance Requests menu option to submit a request for operational or administrative payment advances and to view the status of their submitted requests. This screen is Sponsor-specific.

### To access Advance Requests

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Advance Requests**. The Advance Request list screen displays.

Action	Advance Month	Advance Type	Advance Amount	Outstanding Balance	Status	Date Processed
	Oct 2013				n/a	
	Nov 2013				n/a	
	Dec 2013				n/a	
View   Modify	Jan 2014	Operating			Pending Approval	
	Jan 2014	Administrative			Pending Approval	
Add	Feb 2014				n/a	
Add	Mar 2014				n/a	
Add	Apr 2014				n/a	
View   Modify	May 2014	Operating			Not Requested	
	May 2014	Administrative			Pending Approval	
Add	Jun 2014				n/a	
Add	Jul 2014				n/a	
Add	Aug 2014				n/a	
Add	Sep 2014				n/a	
<b>Totals</b>			\$ 0.00	\$ 0.00		

Figure 35: Advance Request list screen

### To add an Advance Request

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select **Add** next to the advance month for which you would like an advance. The Advance Request screen displays.
4. Select the type of advance you are requesting.
5. Select **Save**. A confirmation screen displays.
6. Select **Edit** to return to the Advance Request screen.  
-OR-  
Select **Finish** to return to the Advance Requests list screen.

**Note:** At least one site must have at least ten (10) operating dates in the advance

month to request an advance.

**Note:** A Sponsor may request up to three (3) Operating Advances and up to two (2) Administrative advances for a designated program year.

## To view or modify an Advance Request

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select the advance you would like to view or modify. The Advance Request screen displays.
4. Update information, if desired.
5. Select **Save**. A confirmation screen displays.
6. Select **Edit** to return to the Advance Request screen.  
-OR-  
Select **Finish** to return to the Advance Requests list screen.

## To delete an Advance Request

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select the advance you would like to delete. The Advance Request screen displays.
4. Select **DELETE** on the Edit menu in the top-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.
7. Select **Finish**.



**WARNING:** Only Advance Requests that have not been submitted can be deleted. Selecting the DELETE button permanently deletes the Advance Request from the system. It will not be recoverable once deleted.

# Advance Requests Manager

The State uses the Advance Request Manager to review and approved advance requests submitted by Sponsors. This menu option is available **ONLY** to authorized State users.

---

## To access Advance Requests Manager

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Advance Requests Manager**. The Advance Requests Manager screen displays.

---

## To search for an Advance Request

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Advance Requests Manager**. The Advance Requests Manager screen displays.
3. Enter desired search criteria and select the Search button. The screen will display all advances that meet the entered criteria.
4. Select the advance you would like to view or modify.  
-OR-  
Select the **Back** button to return to the Applications menu.

The screenshot displays two main components. On the left is the 'Advance Status Summary' table, and on the right is the 'Advance Search' form.

Advance Status Summary	
Incomplete:	0
Error:	0
Pending Approval:	2
Denied:	0
Approved:	1
Processed:	0

Advance Search	
Sponsor	<input type="text"/>
Agreement Number:	<input type="text"/>
Advance Month:	ALL <input type="button" value="v"/>
Advance Status:	ALL <input type="button" value="v"/>

**Figure 36: Advance Requests Manager - Search Feature (partial screen)**



**TIP:** Entering the Agreement Number will retrieve the respective Sponsor's advance submissions. The more specific the search criteria, the faster the search will be.

---

## To review an Advance Request

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Advance Requests Manager**. The Advance Requests Manager screen displays.
3. Enter desired search criteria and select the **Search** button. The screen will display all advances that meet the entered criteria.
4. Select the advance you would like to view or modify.

5. Review the information.
6. Identify whether the Sponsor is approved to receive an advance in excess of \$40,000,
7. Enter the advance amount approved by the State.
8. Enter information in the **Internal Use Only** section.
9. Select the **Save** button. A confirmation screen displays.

## Download Forms

The Download Forms function allows users to view, download and/or print all forms and documents made available on the site by the State.

### To access Download Forms

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Download Forms**. The Download Forms screen displays.

### To download or view a form

---

1. On the blue menu bar, select **Applications**.
2. From the Applications menu, select **Download Forms**. The Download Forms screen displays a list of all available forms.
3. Select the Form ID of the form you wish to download. If the form is a document, a gray dialog box appears.
4. Select **Open** to view the form.  
- OR -  
Select **Save** to save the form to your computer.

**Note:** The software application associated with the form will initiate the opening of the form. For example, if the form is a Microsoft Word document, Microsoft Word on your desktop will initiate the opening of the form. This is also true with Microsoft Excel or Adobe Acrobat forms.

5. Select the **Back** button to return to the previous screen.

### Download Forms

Form ID	Description	Last Modified	New Sponsor?
CACF-0003	Certificate of Authority (p6 of NDE-01-017)	10/26/2012	Y
CACFP Training	CACFP Training class	10/26/2012	Y
DCH-0003	Certificate of Authority (p6 of NDE-01-017)	10/26/2012	Y

**Figure 37: Download Forms screen (partial screen)**



**TIP:** The New Sponsor? column indicates whether the form is required for submission by Sponsors new to the Summer Food Service Program.

# 4

## Claims

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

### About the Claims Process

A Sponsor submits a reimbursement claim to the State for every month in which one or more sites participate in the Summer Food Service Program. Sponsors may enter Sponsor and site information into the monthly claim form beginning at the first of every month. Sponsors have sixty days from the last day of the claim month/year to submit an original claim.

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

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

The following table identifies the steps related to submitting and processing a claim:

Performed by	Task
Sponsor	Complete the Claim for Reimbursement form(s) for the selected claim month. Submit error-free claim to the State for processing.
State	Review and approve claim. Select claim for inclusion in the payment process. Send payment information to the appropriate State agency for payment.

### Claims Menu

Sponsors use the Claims menu to access SFSP claim functions, view current claim rates, or view payment summaries.

Item	Description
Claim - SFSP	Summer Food Service Program Claims
Claim Rates	View current claim rates
Payment Summary	Summary of payments made to this Sponsor

Figure 38: Claims Menu screen

## Claim Dates

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

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

# Claims

The SFSP claim function is used to enter, modify, and view claims. The system provides the ability to submit claims at the Sponsor or site level. Original and upward adjusted claims cannot be submitted if the received date is more than 15 days from the last day of the claim month/year. In order to create a claim in a given month, an approved Application Packet must be in effect for the period.

## To access Claim Entry

---

1. On the blue menu bar, select **Claims**. The Claims menu screen displays.
2. From the Claims menu, select the **Claim - SFSP**. The Claim Year Summary screen displays.  
If a Sponsor has already been selected, the Claim Summary screen displays.  
If no Sponsor has been selected, use the Sponsor Search to search for and select a Sponsor.
3. Select the Claim Month you would like to submit a claim. The Claim Month Details screen displays.

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

## Claim Year Summary

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

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

**Note:** Only months that are identified as valid operational months for the Sponsor are enabled to submit claims.

Claim Month	Adj Number	Claim Status	Date Received	Date Processed	Earned Amount
Oct 2013	0	Processed	11/15/2013	01/14/2014	\$2,557.00
Nov 2013					\$0.00
Dec 2013					\$0.00
Jan 2014					\$0.00
Feb 2014					\$0.00
Mar 2014					\$0.00
Apr 2014					\$0.00
May 2014					\$0.00
Jun 2014					\$0.00
Jul 2014					\$0.00
Aug 2014					\$0.00
Sep 2014					\$0.00
<b>Year to Date Totals</b>					<b>\$2,557.00</b>

Figure 39: Claim Year Summary screen

## Claim Month Details

From the Claim Month Details screen, you can access a specific claim form or a summary of the submitted claim.

If the claim has been processed, the options are View (to view the completed claim form) or Summary (to view the calculated payment summary related to the claim).

### Claim Month: October 2013

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
<a href="#">View</a>   <a href="#">Summary</a>	0	11/15/2013	01/14/2014	01/14/2014	\$2,557.00	Processed
<b>Total Earned</b>					<b>\$2,557.00</b>	

Figure 40: Claim Month Details screen – Example of Processed Claims

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

payment summary related to the claim).

**Claim Month: October 2013**

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
<a href="#">View</a>   <a href="#">Summary</a>	0	11/15/2013	01/14/2014	01/14/2014	\$2,557.00	Processed
<a href="#">View</a>   <a href="#">Modify</a>   <a href="#">Summary</a>	1	02/20/2014	02/20/2014		\$0.00	Accepted
<b>Total Earned</b>					\$2,557.00	

**Figure 41: Claim Month Details screen – Example of Non-Processed Claims**

**Note:** Claims can be modified UNTIL they have been added by the State into the batch payment process. Once a claim has been included in a payment batch, the status of the claim is "Accepted\*" until the batch process has completed. When the batch process has completed, the status of the claim is "Processed".

## Claim Site List

All SFSP Sponsors perform site-level claiming. The Sponsor will first select Add Original Claim from the Claim Months Detail screen. The Claim Site List screen will display.

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

**Figure 42: Claim Site List screen**

The Sponsor would use the Claim Site List screen to select the site whose claim to add, view, or modify.

**Note:** Only active sites with an approved application packet for the school year will have the ability to enter a claim via the Claim for Reimbursement screen.

Month/Year Claimed	Adjustment Number	Date Received	Date Accepted	Date Processed	Reason Code
Oct 2013	1	02/20/2014	02/20/2014		Other - No Fiscal Action

Internal Use Only

Actions	Site #	Site Name	1st Meal Amount	2nd Meal Amount	Previous Amount	Errors	Status
<a href="#">View</a>   <a href="#">Modify</a>	5000001883	Site 1	\$2,505.00	\$52.00	\$2,557.00		Approved
<b>Total</b>			<b>\$2,505.00</b>	<b>\$52.00</b>	<b>\$2,557.00</b>		<b>Net \$0.00</b>

**Figure 43: Claim Site List screen**

## To add an original claim

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select **Add Original Claim** button. For site-level claiming, the Claim Site List screen displays.

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

**Figure 44: Claim Month Details screen – Add Original Claim**

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

4. Under Actions, select **Add** to the left of the Site Name you wish to add an original claim. The Claim for Reimbursement screen displays
5. For each site claim, enter claim information for all enrolled programs.
6. Select **Save**. If there are no errors, the data is saved and the user is returned to Claim Site List screen.
7. Repeat Steps 3-6 for each desired site.
8. Once all site claims are completed, select the **Continue** button on the Claim Site List screen. The Claim Month Details screen is displayed. Review the data for accuracy.

Actions	Site #	Site Name	1st Meal Amount	2nd Meal Amount	Previous Amount	Errors	Status
View   Modify	000006001	Test Site 1	\$0.00	\$0.00	\$0.00		Approved
<b>Total</b>			<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>		<b>Net \$0.00</b>

To make a modification or correction to the claim, select the **Back** button to return to the Claim for Reimbursement screen

To submit the claim, check the Certification box and select the **Submit for Payment** button.

**Note:** When the **Submit for Payment** button is selected, the system performs additional edit checks (e.g., 15/30 day rule, etc.). If the system identifies errors, the errors must be corrected before the user can submit the claim for payment.



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**WARNING:** An original claim cannot be submitted by a Sponsor if the received date is more than 15-days since the last day of claim month/year. For exceptions to this rule, contact NDE for assistance.

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**WARNING:** If the Sponsor has <10 days in their final month of operation, the Sponsor must submit a combined claim representing the current month + previous month'.

If the Sponsor happens to be operating only 1 month that is LESS than 10 days, NDE must instruct the Sponsor to increase the number of operating days to 10 or greater. Since the claim is calculated based on the number of meals and not the number of days, this will not cause a calculation problem and will allow the Sponsor to submit a claim into the system.

---

### To modify an un-processed claim

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select **Modify**. The Claim Site List screen displays.
4. Under Actions, select **Modify** to the left of the Site you wish to view. The Site Claim Report screen displays.

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

5. Update claim information.
6. Select **Save**. If there are no errors, the data is saved and the user is returned to Claim Site List screen.
7. Repeat Steps 4-6 for each desired site claim you would like to modify.
8. Once all site claims are completed, select the **Continue** button on the Claim Site List screen. The Claim Month Details screen is displayed. Review the data for accuracy.
9. To submit the modified claim, check the Certification box and select the Submit for Payment button.

**Note:** When the **Submit for Payment** button is selected, the system performs additional edit checks. If the system identifies errors, the errors must be corrected before the user can submit the claim for payment.



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**WARNING:** An original claim cannot be submitted by a Sponsor if the received date is more than 15 days from the last day of claim month/year. For exceptions to this rule, contact the NDE for assistance.

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## To revise a processed claim

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Claim revision resulting in a downward adjustment may be submitted at any time. Claim revisions resulting in an upward adjustment may be submitted if the date of submission is within 30 days of the last day of the original claim month. Revised claims must be re-processed by the State regardless of their original status.

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired **Claim Month**. The Claim Month Details screen displays.
3. If the Sponsor is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Revise** to the left of the Site Name whose claim you wish to revise. The Claim for Reimbursement screen displays

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

4. Make any necessary changes to the claim.
5. Select **Save**. If there are no errors, the data is saved and the user is returned to Claim Site List screen.
6. Repeat Steps 3-5 for each desired site.
7. Once all site claims are completed, select the **Continue** button on the Claim Site List screen. The Claim Month Details screen is displayed. Review the data for accuracy. To submit the revised claim, check the Certification box and select the **Submit for Payment** button.

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



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**WARNING:** An upward adjusted claim cannot be submitted by a Sponsor if the received date is more than 30-days since the last day of claim month/year. For exceptions to this rule, contact NDE for assistance.

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## To view a claim

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1. From the Claims menu, select the **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired **Claim Month**. The Claim Month Details screen displays.
3. If the Sponsor is performing Sponsor-level claiming, select **View**. The Claim for Reimbursement screen displays.

If the Sponsor is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **View** to the left of the Site Name you wish to view. The Claim for Reimbursement screen displays

## To view a Claim Summary

---

The Claim Summary allows you to view a summary of the month's claim in an easy-to-read or print format. No modifications can be made from this page. A Claim Summary is not available until a claim has been submitted with no errors.

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Sponsor is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Summary** to the left of the Site Name you wish to view. The Claim for Reimbursement Summary screen displays.

## To delete a claim

---

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select **Modify**.
4. Select **Modify** to the left of the Site Name you wish to view. The Claim for Reimbursement screen displays.
5. Select **DELETE** in the Edit menu in the upper-right corner.
6. The system transfers you to the bottom of the screen and a warning message is displayed.
7. Select the **Delete** button at the bottom of the page. A confirmation message displays.
8. Select **Finish**.



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

## Claim Rates

The system provides a screen to view claim for reimbursement rates by year. The rates displayed apply for the rate year defined at the top of the page. Meals are reimbursed based on the designated rate established by the USDA. Annually, the reimbursement rates are entered by authorized NDE staff through the Claim

Rate Maintenance screens in the Maintenance and Configuration module.

## To access Claim Rates

1. From the Claims menu, select **Claim Rates**. The Claim Rates screen displays.
2. Use the **Back** button to return to the Claims menu.

**Claim Rates for SFSP**  
**Rate Year: January 1, 2013 to December 31, 2013**

**Federal Reimbursement Rates**

Operating Rates		Administrative Rates	
	Maximum Rate Per Meal	Rural and All Self- Preparations Sites Maximum Rate Per Meal	Vended Urban Sites Maximum Rate Per Meal
Breakfast	1.9800	0.1800	0.1425
Lunch/Supper	3.4700	0.3300	0.2725
Supplements	0.8200	0.0900	0.0700

Figure 45: Claim Rates for SFSP screen



**TIP:** The Claim Rates screen defaults to the designated program year identified at the top right of the screen. To view the claim rates for a previous year, see Selecting a Program Year.

## Payment Summary

The Payment Summary screen provides a list of all payment batch schedules processed for the Sponsor for the selected school year. Each schedule number and process date represents payments that have been scheduled. Payments from payment batches are grouped by program and sorted by date.

## To access Payment Summary

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

Schedule Number	Processed Date	Warrant Issue Date	Earned Amount	Adjustments	Distribution Amount
11042101	04/21/2011		\$ 26,316.00	\$ 0.00	\$ 26,316.00

Figure 46: Payment Summary List screen

## To view a Payment Summary

1. From the Claims menu, select **Payment Summary**. The Payment Summary List screen displays.

2. Select the payment record you wish to view. The payment summary information displays for all payments included in the payment batch.
3. Select the **Back** button to return to the previous screen.

Schedule Number	Schedule Process Date	Federal Year	Warrant Number	Paid Date
11042101	04/21/2011	2010-2011		
Account Description	Month	Transaction Description	Amount	
SFSP Meals	Jan 2011	Original Claim	\$ 23,766.00	
	Jan 2011	Distribution for Claim #100231	\$ 23,766.00	
SFSP Admin	Jan 2011	Original Claim	\$ 2,550.00	
	Jan 2011	Distribution for Claim #100231	\$ 2,550.00	
Payment Schedule Summary				
	Jan 2011	SFSP Meals	\$ 23,766.00	
	Jan 2011	SFSP Admin	\$ 2,550.00	
<b>Total Payments</b>			<b>\$ 26,316.00</b>	

Figure 47: Payment Summary screen

# Reports

*Standard Reports for the Summer Food Service Program are available to users through the CNP Reports component.*

## About Reports

The Reports component of the SFSP module enables users to run, view, and print reports containing data maintained within CNP. The Report List contains all reports available within the SFSP module. Once a user selects a particular report, CNP may prompt the user for additional parameters information.

Access to Reports is generally provided to authorized State users to help review and manage statewide data. The Reports menu displays only reports to which the user has access.

### To generate a report

---

1. On the blue menu bar, select **Reports**. The Reports menu screen displays.
2. Select the report you wish to generate. The respective report's parameters screen will display.
3. Identify the reports parameters.
4. Select **Create Report**. The report is generated and displays in a new browser window.



**TIP:** Use the Report Filter to filter the Reports list by selected Report Group. For example, to display only Claim-related reports, select Claim Reports from the drop-down list and select the **Apply Filter** button. The Reports list automatically refreshes.

**Note:** The report will not open in a new window if you have a pop-up blocker running on your system. If this occurs, hold down the **CTRL** key and Select **Create Report** again.

Sponsor Reports	
Item	Description
Health Inspection Report	This report provides health inspections data for all Sponsors. This report is automatically generated into a MS Excel file.
Site Information Summary Report	This report displays summary Site information for a selected Sponsor (or all Sponsors).
Site List by County Report	This report provides a list of Sites by county and respective Site-specific summary data. This report is automatically generated into a MS Excel file.
Sponsor Contact Information	This report is used to display contact information for selected Sponsor types. This report is automatically generated into a MS Excel file.
Sponsors Not Participating This Year	This report lists all SFSP Sponsors that participated in the previous fiscal year, but are not participating this federal fiscal year. This report is automatically generated into a MS Excel file.

Figure 48: Summer Food Service Program Reports (Partial)

## Report Parameters

Most reports require one or more parameters to be entered in order to customize the report to the user's specific needs. Report parameters are useful to also limit data contained in the report or control how the information is sorted or grouped. Below is an example of a report parameters screen.

### Sponsor Contact Information Parameters

Search For:  All approved Sponsors  
 Approved year-round Sponsors  
 All cancelled Sponsors  
 Cancelled year-round Sponsors

County:

Figure 49: Example of Report Parameter – Sponsor Contact Information Report

## Report

Most SFSP reports automatically open in a new window using Microsoft Excel so that the user can manipulate and format the data as needed without assistance from a technical person. If a report is not generated automatically in Microsoft Excel (i.e., the report is a Microsoft Report Services reports) a window opens that allows the user to:

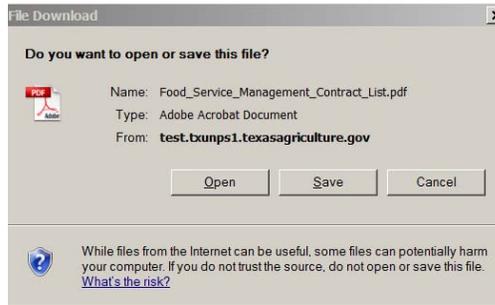
- View the report, page-by-page.
- Change the zoom percentage of the displayed report.
- Search the report using the “Find/Next” feature.
- Select to export the report data (see next section).
- Select to print the report or specific pages.

### To export a report

If the report does not default to a Microsoft Excel format, the user can export the report in a

variety of formats including: .XML, .CSV, .PDF, and Microsoft Excel.

1. In the top menu bar of the generated report, select a format in the **Select a format** box. The Export link becomes active.
2. Select **Export**.
3. The system will open a new window and display a pop-up confirmation asking if you would like to open or save the file.



**Figure 50: Microsoft's File Download Pop-up Window**

4. Select either the **Open** or **Save** option.
5. Your desktop software will manage the opening or saving of the file.



# Security

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

## Security menu

The Security menu option within the Summer Food Service Program module is the access point to the Change Password and User Manager functions.

### To access the Security menu

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1. On the blue menu bar, select **Security**.
2. Select a security item to access that security function.

### To access Change Password

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1. On the blue menu bar, select **Security**.
2. On the Security menu, select **Change Password**. The Change Password screen displays.
3. Enter your **New Password**.
4. Re-Enter your New Password.
5. Select **Save**. A confirmation message displays.
6. Select **Edit** to return to the Change Password screen you just modified.  
-OR-  
Select **Finish** to return to the Security menu.

**Change Password**

Please enter your new password, then re-enter your new password to verify it. Select Save to continue.

New Password:

Re-Enter New Password:

**Figure 51: Change Password screen**

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

# Application Packet Process

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

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

## Submitting an SFSP Application Packet

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

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

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

- The Sponsor Application must contain no errors.
- At least one Site Application must exist and contain no errors.
- A Management Plan must exist and contain no errors.
- A Budget must exist and contain no errors if the Sponsors that:
  - had not enrolled in the Summer Food Service Program in the previous year (i.e., “new” application)
  - OR
  - is identified as a Type of Agency of “Private Non Profit Sponsor” (i.e., on their Sponsor Profile).
- All items in the Checklist must be submitted (submitted checkbox checked and date submitted is entered).
- The Sponsor is not closed.

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

If the Application Packet is denied or returned to the Sponsor for correction, the State will provide

comments within the respective Application Packet item as to why the application was denied or what needs to be corrected in order to re-submit the Application Packet.

## Reviewing an SFSP Application Packet

Once a Sponsor's Application Packet has been submitted, it must be reviewed by an authorized State user. The State must review each item included in the Application Packet and set each item's status to "Approved". This includes each checklist item.

To identify which Application Packets have been submitted, State users can use the Sponsor Search screen by performing a search where Packet Status is "Submitted for Approval".

**Search for Sponsors**

Agreement Number:

Sponsor Name:

FEIN:

County:

Sponsor Status:

Search all available Programs

Packet Status:

Field Service Rep:

Packet Assigned To:

Program Status:

**Figure 52: SFSP Sponsor Search – Packet Status example**

After locating a submitted Application Packet via the Search screen, the State user should follow the following steps:

1. Assign the Application Packet to a State consultant (this may be yourself). For additional information, see the *Assign an Application Packet* section.
2. Review each site application.
  - o Select the Admin option next to the site application item.
  - o Review the application.
  - o Update the Internal Use Only section of each site application.
  - o Enter Internal Comments and Comments to Sponsor, if desired.
  - o Update the application status.
    - If the application has no issues, change the status to "Approved".
      - Returning to the Site List screen, you will notice that the application status is "Approved" and there is a green checkmark next to the packet item.
    - If the application requires additional information or corrections from the Sponsor, change the status to "Returned for Correction".
      - Ensure that you have provided information as to what needs to be corrected within the Comments to Sponsor field.
      - Returning to the Site List screen, you will notice that the application status is "Returned for Correction".

- If the application is not valid for submission, change the status to “Denied”.
  - Ensure that you have provided information as to the reason for denial within the Comments to Sponsor field.
  - Returning to the Site List screen, you will notice that the application status is “Denied”.
- If the Sponsor has requested to withdraw the application, change the status to “Withdrawn”.
  - Ensure that you have entered information as to the reason for the withdrawal within the Comments to Sponsor field.
  - Returning to the Site List screen, you will notice that the application status is “Withdrawn”.

### 3. Review the Sponsor Application.

- Select the Admin option next to the Sponsor Application item.
- Review the application.
- Update the Internal Use Only section of the application.
- Enter Internal Comments, if desired.
- Update the application status.
  - If the application has no issues, change the status to “Approved”.
    - Returning to the Application Packet screen, you will notice that the application status is “Approved” and there is a green checkmark next to the packet item.
  - If the application requires additional information or corrections from the Sponsor, change the status to “Returned for Correction”.
    - Ensure that you have provided information as to what needs to be corrected within the Comments to Sponsor field.
    - Returning to the Application Packet screen, you will notice that the application status is “Returned for Correction”.
  - If the application is not valid for submission, change the status to “Denied”.
    - Ensure that you have provided information as to the reason for denial within the Comments to Sponsor field.
    - Returning to the Application Packet screen, you will notice that the application status is “Denied”.
  - If the Sponsor has requested to withdraw the application, change the status to “Withdrawn”.
    - Ensure that you have entered information as to the reason for the withdrawal within the Comments to Sponsor field.
    - Returning to the Application Packet screen, you will notice that the application status is “Withdrawn”.

4. Review the submitted Food Production Facilities information, if applicable.
5. Review the submitted Management Plan.
6. Review the submitted Budget, if applicable.
7. Review the Checklist items (if applicable).
  - Select the Details option next to Checklist Summary. The Checklist Summary is displayed.
  - Select each checklist item for the Sponsor and each site.
  - Select **INTERNAL USE ONLY** from the top right of the screen.
  - For each checklist item received and reviewed, identify that the items was received and change the status to “Approved”.
    - Returning to the Application Packet screen, you will notice that there is a green checkmark next to the Checklist Summary packet item.

**Note:** If the Sponsor submits a Revised Application, which occurs when a Sponsor makes any changes to an Application Packet that has already been approved, the original packet’s status automatically changes to **Not Submitted**. The State is required to perform all of the steps identified above for the revised items in the Application Packet.

8. Return to the Applications menu, and access the Advance Requests Manager to determine if the Sponsor has submitted an advance request.
  - If an advance request has been submitted, ensure that a Budget has been submitted with the Application Packet and has been approved.
  - Review and approve the Advance Request.

## SFSP Application Packet Checklist Items

### **Sponsor Application**

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1. The following checklist items are required for ALL New and Renewal SFSP Sponsor applications:

- Purchased Meals Contract – Only Vended

The following checklist items are required for ALL New SFSP Sponsor applications:

- Policy Statement
- Permanent Agreement

- Pre-Award Civil Rights Certification

### Site Application

---

1. The following checklist item is required for ALL New and Renewal SFSP Site applications:
  - Rosters/Eligibility Documentation

## Approving an SFSP Application Packet

Once the State has reviewed each Application Packet item and has identified each item as “Approved”, the State can now approve the Application Packet.

For new Sponsors, two levels of approval are required. Initially, an authorized State user would select the **Recommend Approval** button on the Sponsor's Application Packet screen. Once the button is selected, the **Approve** button is activated on the Sponsor's Application Packet screen. Once the Approve button is selected, the Application Packet status is set to “Approved” and the Sponsor can begin submitting claims for reimbursement based on the approved Application Packet's data.

For existing Sponsors, only a single level of approval is required. Once the renewal applications and required packet items have all been reviewed and approved by NDE, the State user selects the **Approve** button (i.e., the **Recommend Approval** button is not active) on the Sponsor's Application Packet screen. Once the **Approve** button is selected, the Sponsor can begin submitting claims for reimbursement.

**Note:** If the Sponsor submits a Revised Application, which occurs when a Sponsor makes any changes to an “Approved” Application Packet, the packet's status automatically changes to “Not Submitted”. The State is required to perform all of the steps identified above for the revised Application Packet.

## Application Packet Statuses

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

### Not Submitted

- The packet has a status of “Not Submitted” when the packet is created for the first time or when any of the packet items are created, revised, or modified, but the Application Packet has not been submitted to the State.

### Submitted

- The packet has a status of “Submitted” when the Sponsor uses the **Submit for Approval** button on the Application Packet screen to submit the error-free packet to the State for review.
- If the packet status is “Submitted”, the entire packet becomes read-only to the Sponsor.
- All applications that are “Submitted” must ultimately be “Approved”, “Denied”, or “Returned for Correction” or “Withdrawn”.

### Approval Recommended (i.e., First Level Approved)

- When a Sponsor is new to the program, the system will require two levels of approval. This status represents the first level of approval performed by the State before a final approval is granted.
- The Application Packet screen will display the **First Approval** button when the first level approval is required. After the button has been selected, this button will not display; however, the **Approve** button will be displayed.

#### Approved

- The packet has a status of “Approved” when the State has approved each packet item AND has selected the **Approve** button on the Application Packet screen.

#### Denied

- The packet has a status of “Denied” when the State selects the **Deny** button on the Application Packet screen.
- When a packet is “Denied”, the packet remains view-only and nothing in the packet can be modified. The only way to edit items in a denied packet is for the State to change the status of the packet to something other than “Denied”.
- By denying an Application Packet, the status of all items within the packet is automatically set to “Denied”.
- An “Approved” packet cannot be “Denied”.

#### Returned for Corrections

- The packet has a status of “Returned for Corrections” when the State selects the **Return** button on the Application Packet screen.
- This status unlocks the packet for the Sponsor and sets the status back to “Not Submitted”.
- An “Approved” packet cannot be “Returned for Corrections”.

#### Withdrawn

- The packet has a status of “Withdrawn” when the Sponsor or State selects the **Withdraw** button on the Application Packet screen.
- An Application Packet with a status of “First Level Approved” can be withdrawn.
- An Application Packet with a status of “Approved” packet cannot be “Withdrawn”. If an application has been “Approved”, it can only be “Cancelled” or “Terminated” by the State (see *Application Packet* section).

## Application Statuses

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

#### Pending Validation

- The application has a status of “Pending Validation” when the application has not yet been opened or saved.

#### Error

- The application has a status of “Error” if it has failed system validation rules. Data entered is maintained.

#### Not Submitted

- The application has a status of “Not Submitted” when the application is saved without error, but the Application Packet has not been submitted to the State.

#### Submitted

- The application has a status of “Submitted” when the Sponsor has submitted the Application Packet to the State for review (i.e., the Sponsor has selected the **Submit for Approval** button).
- Any application that is marked “Not Submitted” is changed to “Submitted”
- The Application Packet becomes read-only to Sponsor users.

#### Approved

- The application has a status of “Approved” when the State has approved the application (i.e., the State selected “Approved” in the Internal Use Only section of the form).

#### Denied

- The application has a status of “Denied” when the State has denied the application (i.e., the State selected “Denied” in the Internal Use Only section of the form).
- If the application is “Denied”, it can no longer be modified by the Sponsor. Only the State can change the status of the application.
- When setting the application status to “Denied”, the State should enter a comment in the Comments to Sponsor field explaining the reason the application was denied.

#### Returned for Correction

- The application has a status of “Returned for Correction” when the State has identified errors in the application and has selected “Returned for Correction” in the Internal Use Only section of the form.
- When setting the application status to “Returned for Correction”, the State should enter a comment in the Comments to Sponsor field explaining the reason the application was returned.

#### Withdrawn

- The application has a status of “Withdrawn” when the State has selected “Withdrawn” in the Internal Use Only section of the form.
- If the Application Packet has ever been approved, there will not be an option to withdraw.

## Claim Statuses

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

#### Not Eligible

- The claim has a status of “Not Eligible” when there is an application condition that is preventing claiming for the selected month (e.g., Sponsor or site is not authorized on the Application Packet to operate for the selected month or the Application Packet status is not “Approved”).

#### Incomplete

- The claim has a status of “Incomplete” when the claim has been created in the system but the **Save** button was never clicked (e.g., timeout, logout, etc.). The system saves the data that has been entered, but no edits have been performed.

#### Error

- The claim has a status of “Error” when the claim has been submitted and has business rule violations.

#### Pending

- The claim has a status of “Pending” when the claim has been saved and on-line edits have been performed, but the claim has not been submitted and validated with additional edits (e.g., 15/30 days edit, etc.).
- Applicable only when the Sponsor is participating in Sponsor-level claiming.

#### Validated

- This site claim has a status of “Validated” when the site claim has been entered, validated, and contains no errors.
- Applicable only when the Sponsor is participating in site-level claiming.

#### Accepted

- The claim has a status of “Accepted” when the claim has passed all on-line edits and additional edits (e.g., 15/30 days edit, etc.), and is ready to be included in the payment tracking process.
- The claim can still be modified. A revision is not necessary until the claim is included by the State in a batch payment process.

#### ○ Accepted\*

- The claim has a status of “Accepted\*” when the claim has been selected by the State for inclusion in the batch payment process; however, the batch process has not run.
- The claim cannot be modified. If the claim requires a change, a revised claim must be submitted.

#### Processed

- Claim has been fully processed by NDE and has been sent to the State’s Accounting Office for disbursement of funds.