COLYAR CONSULTING GROUP, INC.

Texas Unified Nutrition Programs System (TX-UNPS)

School Nutrition Programs

User Manual

Texas Department of Agriculture

Food and Nutrition Division

For External Users

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TABLE OF CONTENTS

TABLE OF FIGURES

1

Introduction

Welcome to the Texas Unified Nutrition Programs System (TX-UNPS) user manual for the School Nutrition Programs module. TX-UNPS is a web-based software solution that provides administrators, state users, and Contracting Entities with efficient and immediate access to applications, claims, and related nutrition program functions.

Website Benefits and Features

TX-UNPS is a user-friendly web application that allows authorized state agency personnel, Contracting Entities, and Education Service Centers (ESC) to submit and approve application, claims, and miscellaneous forms via the Internet. Key system features include:

- A software system that manages information regarding Contracting Entities, 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 School Nutrition Programs. It is designed to provide a general understanding of how to use the system in an effective and efficient manner. This manual will provide:

- A general explanation of each feature available.

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

2

Getting Started

Before you can begin using TX-UNPS administrative modules, you must be assigned a user ID and password by the TX-UNPS Help 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 TX-UNPS web site.

Accessing the Website

You can access TX-UNPS from any computer connected to the Internet by opening your Internet browser and entering the following URL in the browser's address line: http://txunps.texasagriculture.gov/ The TX-UNPS project page displays. Click the "**Continue to TX-UNPS logon page"** link to log into TX-UNPS.

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

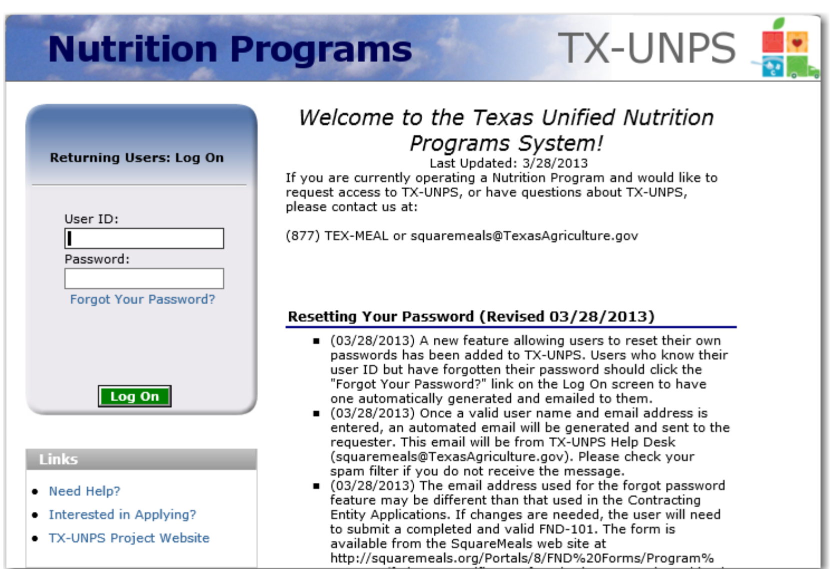


Figure 1: TX-UNPS Home Page

About the TX-UNPS Home Page

The TX-UNPS Home Page consists of three major sections:

- Bulletin Board.
- Log on.
- Links.

Bulletin Board

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

Log On

The log on section is where authorized users enter their User ID and password. If users have forgotten their password, they can request a new temporary password be automatically generated by TX-UNPS and e-mailed to the email address associated with their profile.

By selecting the Forgot Your Password? Link, users are transferred to the Password Reset screen. By entering their User ID and the email address associated with their security profile, TX-UNPS will automatically email a temporary password. This email will be from TX-UNPS Help Desk (squaremeals@TexasAgriculture.gov). Users should check their spam filter if they do not receive the message.

Note: You should enter the email address associated with your Security Profile. This may not be the same as the email addresses specified on the Contracting Entity applications. If you are having any issues, please contact the TX-UNPS Help Desk.

Figure 2: Password Reset Screen

Once users receive the email and log into TX-UNPS with the assigned temporary password, you will be taken to the Change Password screen to create a new password.

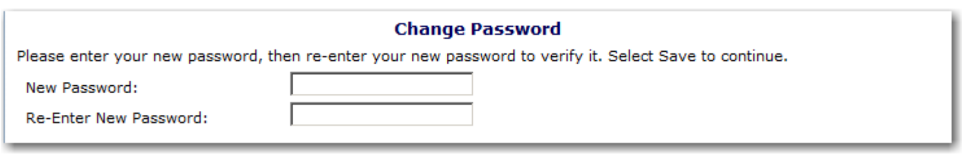


Figure 3: Change Password Screen

Note: Security configuration settings require a password ten (10) to twelve (12) characters in length. Please note that the password must be at least ten (10) characters in length. The password must contain at least one number, one letter, and one special character (e.g., !, ?, /). Passwords are case sensitive.

Links

The links section provides access to websites and additional information:

- Selecting the **Need Help?** link will transfer the user to a webpage that contains the TX-UNPS User Manuals and other program resources (ex. Administrator's Reference Manual and Handbooks). The user can also send a support request or request a User ID and password.

- Selecting the **Interested in Applying?** link will transfer the user to a webpage that provides additional information on the nutrition programs offered and allow the user to submit a request for an application.

- Selecting the **TX-UNPS Project Website** link will transfer the user to the project's website.

Logging On

To log on

1. Access TX-UNPS 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 TX-UNPS Help Desk.

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

To change your password

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

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

Note: Security configuration settings require a password ten (10) to twelve (12) characters in length. Please note that the password must be at least ten (10) characters in length. The password must contain at least one number, one letter, and one special character (e.g., !, ?, /). Passwords are case sensitive.

TX-UNPS Content Overview

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

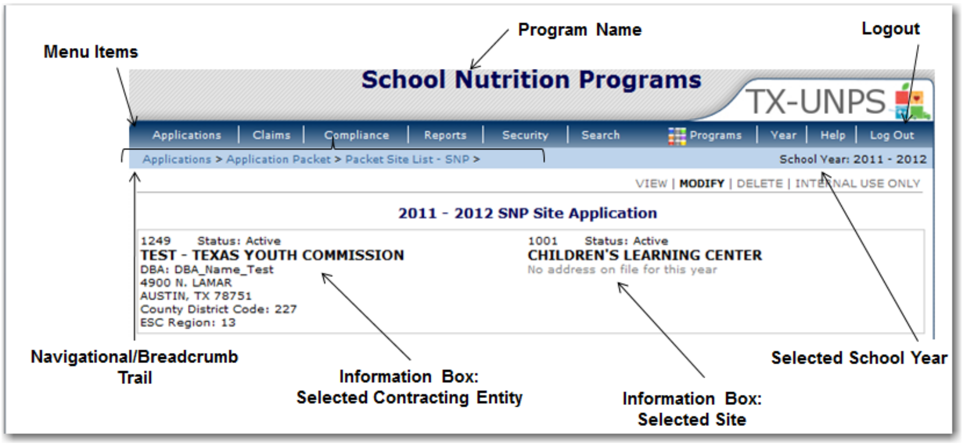


Figure 4: TX-UNPS Content Overview

Item	Description
Program Name	The selected program name appears in the gray area at the top of the page.
Menu Items	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 TX-UNPS Help Desk for assistance.
Navigation/Breadcrumb Trail	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.
School Year	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.
Information Box	The information box displays general information regarding the Contracting Entity/Site.

Item	Description
Logout	The logout button displays in the menu bar. It is recommended to select **Logout** 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.

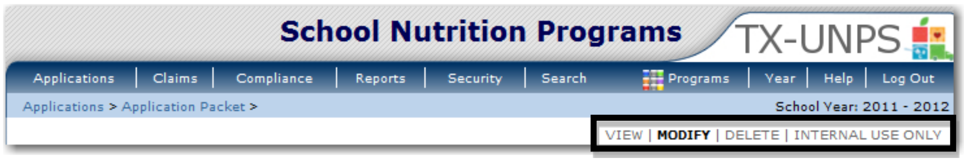


Figure 5: Screen Options - Example

The following table describes each of the possible screen options:

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

TX-UNPS Programs Page

Once you successfully log on, the TX-UNPS 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. Contracting Entities and ESCs will not have access to these modules. Only select authorized State users will have access to these modules.

Figure 6: TX-UNPS Programs Page

Selecting this button…	Provides…
School Nutrition Programs	Access to the School Nutrition Programs home page
Child and Adult Care Food Program	Access to the Child and Adult Care Food Program home page
Summer Food Service Program	Access to the Summer Food Service Program home page
Food Distribution Program	Access to the Food Distribution Program home page

School Nutrition Programs Home Page

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

To access the School Nutrition Programs home page

1. Log on to the TX-UNPS web site.
2. On the Programs screen, select **School Nutrition Programs**.

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

3. The School Nutrition Programs home page displays.

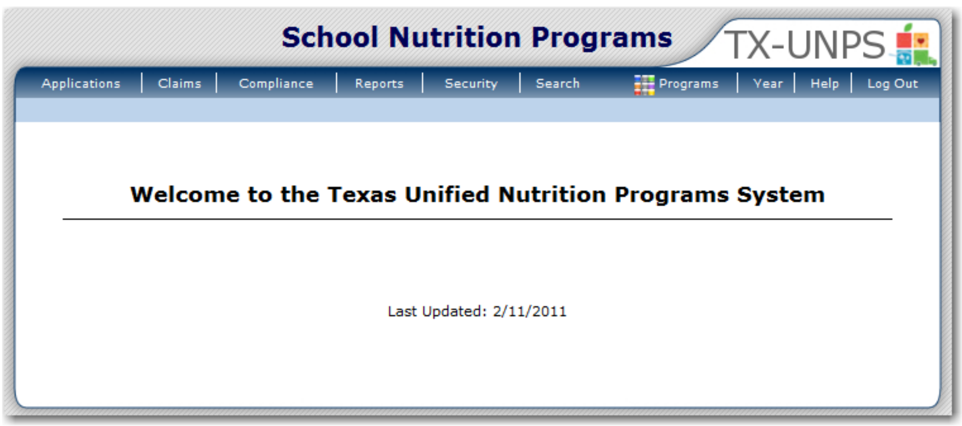


Figure 7: School Nutrition Programs Home Page

School Nutrition Programs menu options

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

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

Menu Item	Menu Features
Applications	Access to overall application-related items including: ▪ Contracting Entity Manager (State users only). ▪ Application Packet (inc. Contracting Entity, SNP, SSO, and FFVP applications). ▪ Verification Reports. ▪ Food Safety Inspection Reports. ▪ Fresh Fruit and Vegetable Invitations and Grants. ▪ Summer Nutrition Program Costs. ▪ Capital Expenditure Requests. ▪ Texas Summer Mandate. ▪ Direct Certification/Direct Verification. ▪ Download Forms.
Claims	Access to claim entry screens (e.g., SNP, SSO, and FFVP) and Contracting Entity-specific payment history.
Reports	Access to a variety of standard SNP reports and a link to the TX-UNPS Data Warehouse.
Security	Access to an individual user's security-related items including: ▪ Change Password (authenticated user changing their password).
Search	Access to the Contracting Entity Search screen (State users, ESCs and Contracting Entity users with access to more than one Contracting Entity.).

Error Processing

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

Input Edits

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

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

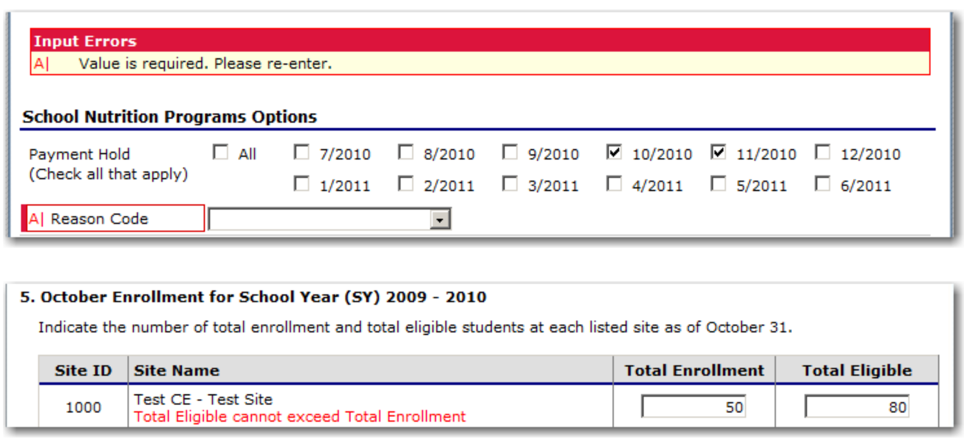


Figure 8: Examples of an Input Error (Partial Screen)

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, TX-UNPS 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.

Figure 9: 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.

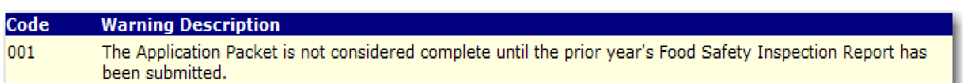


Figure 10: Example of a Warning Error

Selecting a School Year

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

Note: A Contracting Entity will be unable to select a new year if they have not been granted the security right. Contact the TX-UNPS Help Desk and request access to the **Select Year** security right if you think this is in error.

To select a school year

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

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

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

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

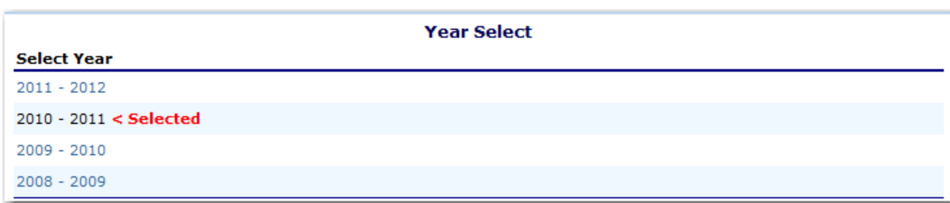


Figure 11: Year Select Screen

Contracting Entity Search

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

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

To search for a Contracting Entity

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

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

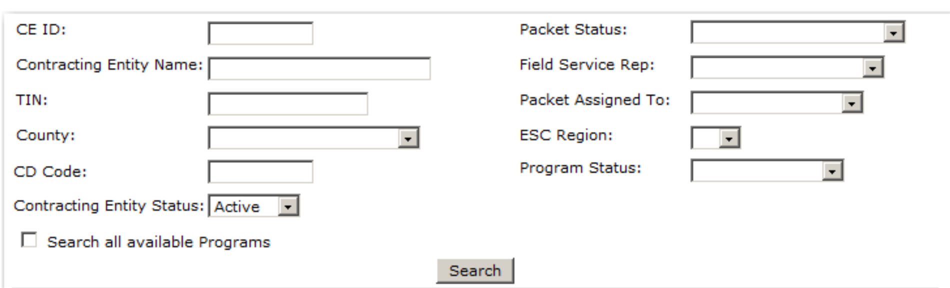


Figure 12: Contracting Entity Search Screen

Note: Users will only see Contracting Entities associated with their user account (e.g. ESC users will only see Contracting Entities in their region).

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 Contracting Entity that includes the parameter in any portion of the selected field. For example, if the user entered "386" in the CE ID parameter, the system will retrieve Contracting Entities with CE IDs of "00386" and "01386".

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

Parameter	Type of Search	Search Features
CE ID	"includes"	▪ If in combination with the Contracting Entity Name, the CE ID takes precedence ▪ If in combination with any other parameter, all parameters are used to perform the search
Contracting Entity Name	"includes"	▪ If in combination with the CE ID, the CE ID takes precedence; this parameter is ignored ▪ If in combination with any other parameter, all parameters are used to perform the search
TIN **CD Code**	"includes"	▪ If in combination with the CE ID, the search is performed using both the CE ID and this parameter ▪ If in combination with any other parameter, all parameters are used to perform the search
County **Packet Status** **Field Service Rep** **Packet Assigned To** **ESC Region** **Program Status**	"exact match"	▪ If in combination with the CE ID, the search is performed using both the CE ID and this parameter ▪ If in combination with any other parameter, all parameters are used to perform the search
Contracting Entity Status	"exact match"	▪ Required; defaults to "Active" ▪ If in combination with any other parameter, all parameters are used to perform the search

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

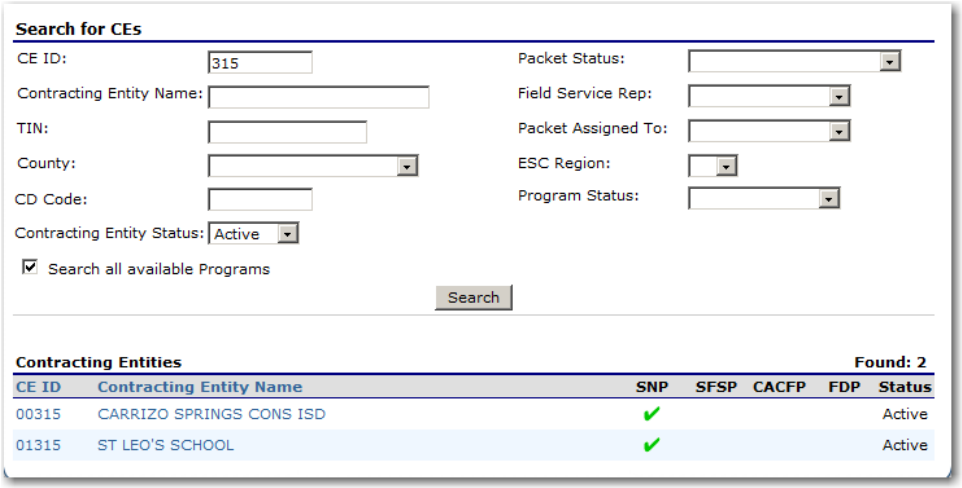


Figure 13: Contracting Entity Search screen – “Search All Available Programs” Example

3

Applications

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

About the School Year Enrollment Process

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

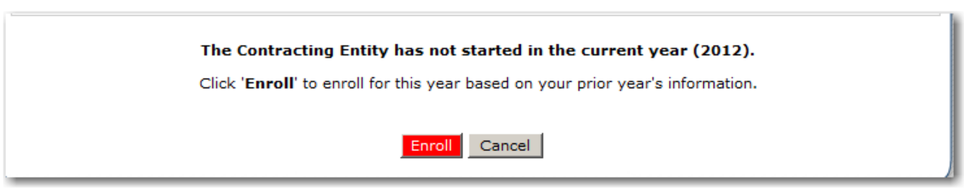


Figure 14: Enrolling in a New Program Year

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

Submitting an Application Packet

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

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

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

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

Packet History

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

Figure 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 School Nutrition Programs enrollment process. Menu items are based on security levels.

To access the Applications Menu

4. On the blue menu bar, select **Applications.** The Applications Menu displays.

5. 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 Contracting Entities have significantly fewer Applications menu items.

Item	Description
Contracting Entity Manager	SNP Contracting Entity's Profile, Site and Hold Information
Application Packet	Applications Forms (Contracting Entity and Site)
Verification Report	Mandatory Annual Verification Report
Verification Summary	Mandatory Annual Verification Report Summary
Food Safety Inspections	Number of Food Safety Inspections by Site
Food Safety Inspections Summary	Number of Food Safety Inspections by Site Summary
Fresh Fruit and Vegetable Program Grants	Fresh Fruit and Vegetable Grant Information by Site
Fresh Fruit and Vegetable Program Grant Overview	Fresh Fruit and Vegetable Grant Information by Site Overview
Fresh Fruit And Vegetable Program Summary	Fresh Fruit And Vegetable Program Summary
Summer Nutrition Program Costs	Total Costs Associated with Operating a Summer Nutrition Program
Capital Expenditure Request	Request for funds to purchase capital items > $5,000
October Enrollment	October Enrollment and Eligibility by Site
Texas Summer Mandate	Summer Nutrition Programs Intent Declaration
Texas Summer Mandate Summary	Summer Nutrition Programs Intent Summary
Direct Certification / Direct Verification	Direct Certification / Direct Verification screens
Download Forms	Forms Available for Downloading

Figure 16: Applications Menu Screen (State View)

Application Packet

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

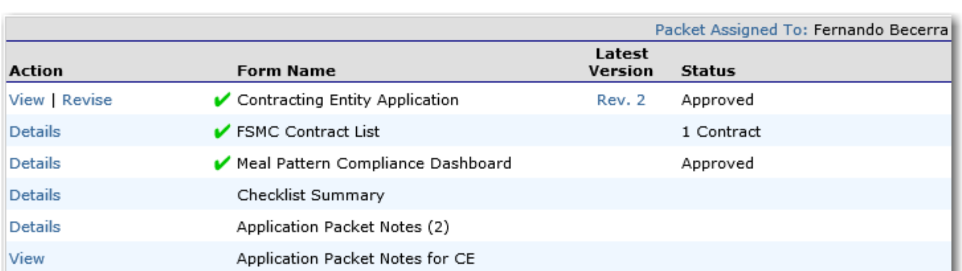
The Application Packet contains the Contracting Entity application, site application(s), and other forms required as a part of the packet. After selecting Application Packet from the Applications menu, each required packet item and its status displays. If any packet item requires attention (such as an 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: Contracting Entities may not submit claims until their Application Packet has been approved for the respective program year.

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

To access the Application Packet

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


Packet Assigned To: Fernando Becerra

Action	Form Name	Latest Version	Status
View | Revise	✔ Contracting Entity Application	Rev. 2	Approved
Details	✔ FSMC Contract List		1 Contract
Details	✔ Meal Pattern Compliance Dashboard		Approved
Details	Checklist Summary		
Details	Application Packet Notes (2)		
View	Application Packet Notes for CE		

Figure 17: Application Packet Screen

Contracting Entity Application

The Contracting Entity Application screen provides access to the Contracting Entity's annual application for the School Nutrition Programs for both new and renewing Contracting Entities. The Contracting Entity is required to complete a new Contracting Entity application annually; however, **the State has identified** select Contracting Entity data that rolls over from the previous year and pre-fills a new year's application.

To view a Contracting Entity 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 **Contracting Entity Application** packet item. The Contracting Entity Application for the designated school year is displayed.

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

To view a Contracting Entity 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 Contracting Entity 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 a Contracting Entity application (New Contracting Entity)

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 **Contracting Entity Application** packet item. The Contracting Entity Application for the designated school year is displayed.

4. Enter required information.

5. Select **Save**. A confirmation screen displays.

6. Select **<Edit** to return to the Contracting Entity Application screen.

   -OR-

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

> **TIP:** The Add option only appears for new Contracting Entities. If a Contracting Entity 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 a Contracting Entity 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 **Contracting Entity Application** packet item. The Contracting Entity 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 Contracting Entity 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 a Contracting Entity 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 **Contracting Entity Application** packet item. The Contracting Entity Application for the designated school 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 Contracting Entity application can only be deleted if the Contracting Entity has not yet submitted any claims for the school year.

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

To revise a Contracting Entity application

Note: Only state-approved applications can be revised. Once a Contracting Entity 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 **Contracting Entity Application** packet item. The Contracting Entity 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 Contracting Entity 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 – School Nutrition Program

Contracting Entities must complete a Site Application for each of their sites. The Site Application screen provides access to the Site's annual application for the School Nutrition Programs for both new and renewing sites. Sites must complete a new application annually; however, **the State has identified** select site data that rolls over from the previous year and pre-fills a new year's application.

To access the Contracting Entity'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 **School Nutrition Program**. The Application Packet - SNP Site List screen displays.

Action	Site ID / Site Name	NSLP	SBP	ASCP	SMP	FFVP	Version/ Status	% Enroll Free/Redc Oct 2010
	Totals	67	56	0	0	0		
View | Modify Admin	0003 WILLIAMS H S	X	X				Original / Pending Validation	0.00
View | Modify Admin	0004 VINES H S	X	X				Original / Pending Validation	0.00
View | Modify Admin	0005 CLARK H S	X	X				Original / Pending Validation	0.00
View | Modify Admin	0006 PLANO EAST SR H S	X	X				Original / Pending Validation	0.00

Figure 18: Application Packet – SNP Site List Screen

To add a new site (for Contracting Entities)

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 **School Nutrition Program**. The Application Packet - SNP Site List screen displays.
4. At the bottom of the site list, select **Add Site Application.** The SNP Available Site(s) screen displays.

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

5. If the site you would like to add an application for is listed, 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.

6. The system automatically defaults the Site ID to the next available ID for this Contracting Entity.

> **TIP:** For most Contracting Entities, 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 Contracting Entity. However, public/charter schools should use the campus code assigned by the Texas Education Agency.

7. Enter the Site Name and County.

8. Select **Save.** The Site Application for the new site is displayed.

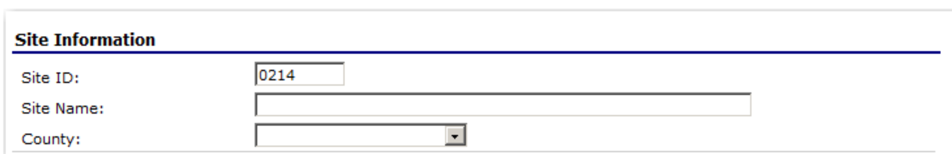


Figure 19: 'Quick' Site Profile Screen

To view 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 **School Nutrition Program**. The Application Packet - SNP Site List screen displays.

4. Select View next to the site whose application you would like to view. The site's Site Application is displayed.

To modify a Site Application

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

To delete a Site Application

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

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

To revise a Site Application

Note: Only state-approved applications can be revised. Once a Contracting Entity 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 **School Nutrition Program**. The Application Packet - SNP 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 SNP Site List screen.

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

Site Applications – Seamless Summer Option

Contracting Entities must complete a Site Application for each of their seamless summer sites. The Site Application screen provides access to the Site's annual application for the Seamless Summer Options for both new and renewing sites. Sites must complete a new application annually; however, the State has identified select site data that rolls over from the previous year and pre-fills a new year's application.

To access the Contracting Entity'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 **Seamless Summer Option**. The Application Packet – Seamless Summer Option Site List screen displays.

Action	Site ID / Site Name	BRK	AM SNK	LUN	PM SNK	SPR	Version/ Status	% Enroll Free/Redc Oct 2010
	Totals	2	0	1	0	0		
View | Modify Admin	0001 DIBOLL H S	X					Original / Error (14)	
View | Modify Admin	0102 DIBOLL PRI	X		X			Original / Pending Validation	0.00
Add Site Application								

Figure 20: Application Packet – Seamless Summer Option Site List Screen

To add a new SSO site (for Contracting Entities)

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 **Seamless Summer Option**. The Application Packet - Seamless Summer Option Site List screen displays.
4. At the bottom of the site list, select **Add Site Application.** The SSO Available Site(s) screen displays.

Note: The sites displayed on this screen are sites that are designated as SSO 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.

6. The system automatically defaults the Site ID to the next available ID for this Contracting Entity. The user can enter in another Site ID; however, it must be 4 digits and must not have already been assigned to another site.

TIP: 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 Contracting Entity.

7. Enter the Site Name and County.

8. Select **Save.** The SSO Site Application for the new site is displayed.

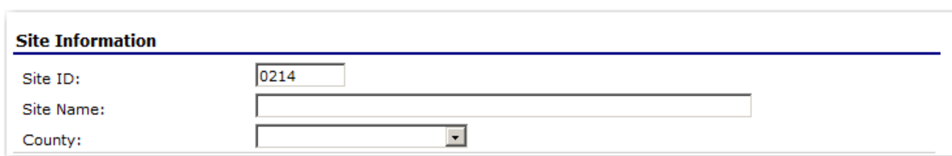


Figure 21: 'Quick' Site Profile Screen

To view a SSO 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 **Seamless Summer Option**. The Application Packet - Seamless Summer Option Site List screen displays.

4. Select View next to the site whose application you would like to view. The site's SSO Site Application is displayed.

To modify a SSO 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 **Seamless Summer Option**. The Application Packet - Seamless Summer Option Site List screen displays.
4. Select Modify next to the site whose application you would like to view. The site's SSO Site Application is displayed.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the SSO Site Application screen.

   -OR-

   Select **Finish** to return to the Seamless Summer Option Site List screen.
8. Repeat **Steps** 4 through 7 for each site that will participate in the program.

To delete a SSO 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 **Seamless Summer Option**. The Application Packet - Seamless Summer Option Site List screen displays.
4. Select Modify next to the site whose application you would like to delete. The site's SSO 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 SSO Site Application

Note: Only state-approved applications can be revised. Once a Contracting Entity 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 **Seamless Summer Option**. The Application Packet - Seamless Summer Option Site List screen displays.
4. Select Revise next to the site whose application you would like to delete. The site's SSO Site Application is displayed.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the SSO Site Application screen.

   -OR-

   Select **Finish** to return to the Seamless Summer Option Site List screen.

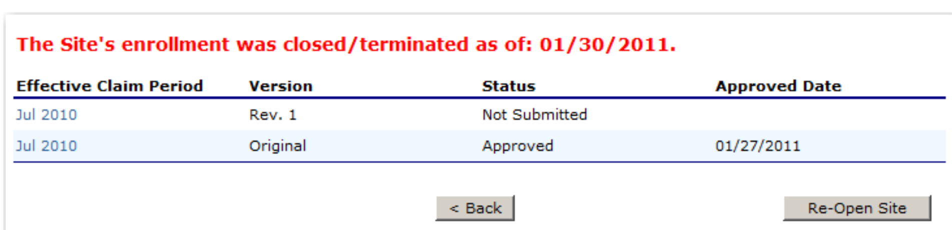
TIP: The Revise option only appears when the previously submitted Application Packet has been approved by the State.

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 **School Nutrition Program**. The Application Packet - SNP 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 Contracting Entity 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

< Back   Re-Open Site

Figure 22: Example of a Confirmation of a Closed Site

Food Service Management Company (FSMC) Contract List

If the Contracting Entity's School Nutrition Programs is managed by a Food Service Management Company (FSMC), then information regarding the FSMC contract is **required** as a part of the Application Packet. The FSMC Application Packet item is initiated when the Contracting Entity has specified that they will be using a FSMC on their Contracting Entity application. If the Contracting Entity has not specified that they will be using a FSMC for the respective year, the FSMC Contract List will not appear on the Application Packet screen.

To access the Food Service Management Company Contract List

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **FSMC Contract List**. The Food Service Management Company Contracts screen displays.

Figure 23: Food Service Management Company Contracts List Screen

To add a Food Service Management Company contract

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **FSMC Contract List**. The Food Service Management Company Contracts list screen displays.
4. Select the **Create New Contract** button. The Food Service Management Company Contract for the specified year is displayed.

5. Select the company. The Company Contact Information is automatically populated.
6. Enter additional contract information.
7. Select **Save**. A confirmation screen displays.
8. Select **<Edit** to return to the Food Service Management Company Contract screen.

   -OR-

   Select **Finish** to return to the Food Service Management Company Contracts list screen.

To modify a Food Service Management Company contract

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **FSMC Contract List**. The Food Service Management Company Contracts list screen displays.
4. Select **Modify** next to the company you want to modify.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Food Service Management Company Contract screen.

   -OR-

   Select **Finish** to return to the Food Service Management Company Contracts list screen.

WARNING: Contract information can be modified only until the State has approved the FSMC contract. Once the FSMC contract has been approved the user would only use the Modify option to early terminate or cancel the FSMC contract.

To delete a Food Service Management Company contract

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **FSMC Contract List**. The Food Service Management Company Contracts list screen displays.
4. Select **Modify** next to the company you would like to delete. The Food Service

Management Company Contract screen 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 contract who's Application Packet has not been approved can be deleted. Once the contract has been deleted, it is permanently removed and cannot be restored. Use caution before deleting a contract.

To early terminate an active Food Service Management Company contract

TIP: Within the system, Food Service Management Company contracts automatically renew based on the number of optional renewal years specified on the Food Service Management Company Contract screen. To end a contract mid-year, use the Early Termination section of the form.

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

2. On the menu, select **Application Packet**. The Application Packet screen displays.

3. Select **Details** next to **FSMC Contract List**. The Food Service Management Company Contracts list screen displays.

4. Select **Modify** next to the company you want to modify.

5. Under the Early Termination Information section, identify that you are terminating the contract early and enter the date and reason for early termination.

6. Select **Save**. A confirmation screen displays.

7. Select **<Edit** to return to the Food Service Management Company Contract screen.
   -OR-
   Select **Finish** to return to the Food Service Management Company Contracts list screen.

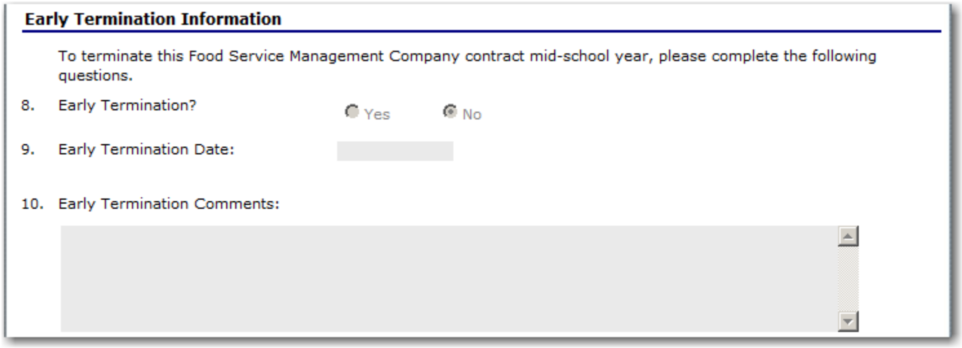


Figure 24: Food Service Management Company Contracts Screen (Partial) - Termination

To cancel a renewing Food Service Management Company contract

TIP: Within the system, Food Service Management Company contracts automatically renew based on the number of years specified on the Food Service Management Company Contract screen. Only contracts in a renewal year can be cancelled. This option is not available in the initial year.

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **FSMC Contract List**. The Food Service Management Company Contracts list screen displays.
4. Select **Modify** next to the company you want to modify.
5. Under the Cancellation of Renewal Years section, check the box identifying that you are cancelling future renewals with this Food Service Management Company.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Food Service Management Company Contract screen.

   -OR-

   Select **Finish** to return to the Food Service Management Company Contracts list screen.

Figure 25: Food Service Management Company Contracts Screen (Partial) - Cancellation

Meal Pattern Compliance Dashboard

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

To access the Meal Pattern Compliance Dashboard

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.

> **Note**: Menus submitted in previous years are accessible for "View-only" from the Meal Pattern Compliance Dashboard.

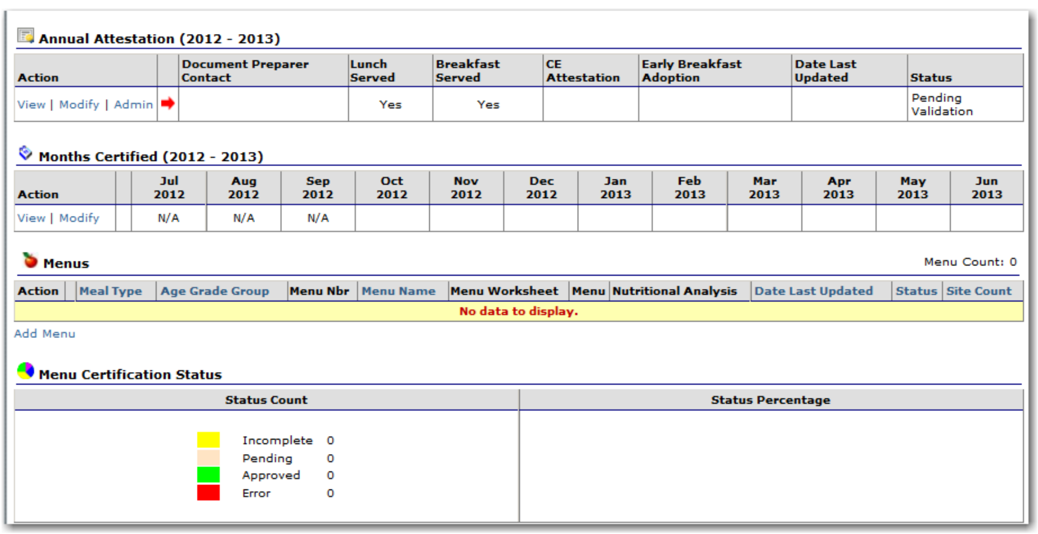
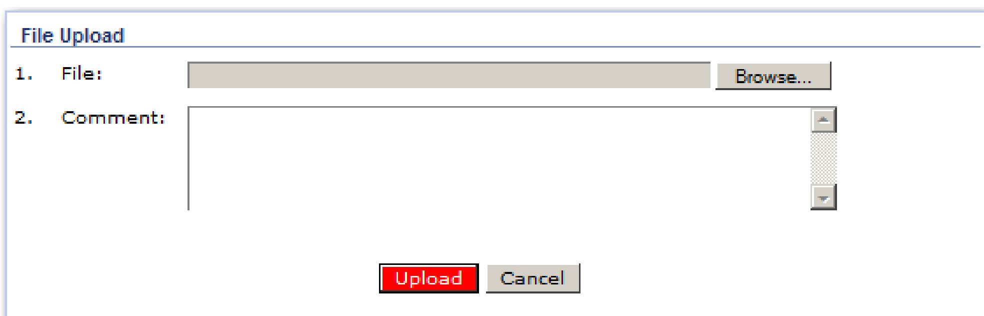


Figure 26: Meal Pattern Compliance Dashboard Screen

To add a Menu

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.
4. Select the **Add Menu** link in the Menus section of the Meal Pattern Compliance Dashboard. The Menu screen displays.
5. Select the Meal Type and Age Grade Group. Select the **Save** button. The Menu screen re-displays with additional fields and capabilities.
6. Enter the Menu Name.
7. In the Supporting Document section, select the **Add** link to upload the respective file document. The File Upload screen displays providing the ability to Browse and Upload a document.



8. Select **Upload** to upload the document and return to the Menu screen.
9. Select the site(s) served by the menu.
10. Enter comments, if necessary.
11. Select **Save**. A confirmation screen displays.
12. Select < **Edit** to return to the Menu screen.

    -OR-

    Select **Finish** to return to the Meal Pattern Compliance Dashboard screen.

TIP: In the Sites Serving section, the system will display SNP sites that meet the selected Meal Type and Age Grade Group based on the current Site Application.

TIP: Each Menu must include the following supporting documents: Menu Worksheet and Menu.

To modify a Menu

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.
4. Select the **Modify** link next to the Menu to modify. The Menu screen displays.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select < **Edit** to return to the Menu screen.

   -OR-

   Select **Finish** to return to the Meal Pattern Compliance Dashboard screen.

TIP: Once saved, the Meal Type and Age Grade group fields are not editable. If these values need to be changed, delete the menu and add a new one.

To view a Menu

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.
4. Select the **View** link next to the Menu to view. The Menu screen displays.

To delete a Menu

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.
4. Select **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 displays.

6. Select the **Delete** button at the bottom of the page. A confirmation message displays.

To modify an uploaded supporting document

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

2. On the menu, select **Application Packet**. The Application Packet screen displays.

3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.

4. Select the **Modify** link next to the Menu to modify. The Menu screen displays.

5. Select the **Modify** link next to the supporting document to re-upload. The File Upload screen displays providing the ability to Browse and Upload a new document. The new document will replace the existing document.

6. Select **Upload** to upload the document and return to the Menu screen.

7. Select **Save**. A confirmation screen displays.

8. Select < **Edit** to return to the Menu screen.
   -OR-
   Select **Finish** to return to the Meal Pattern Compliance Dashboard screen.

To delete an uploaded supporting document

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

2. On the menu, select **Application Packet**. The Application Packet screen displays.

3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.

4. Select the **Modify** link next to the Menu to modify. The Menu screen displays.

5. Select the **Delete** link next to the supporting document to re-upload. The File Upload screen displays and a warning message displays.

6. Select the **Delete** button. The Menu screen displays.

7. Select **Save**. A confirmation screen displays.

8. Select < **Edit** to return to the Menu screen.

   -OR-

   Select **Finish** to return to the Meal Pattern Compliance Dashboard screen.

> **TIP:** Each Menu must include the following supporting documents: Menu Worksheet and Menu.

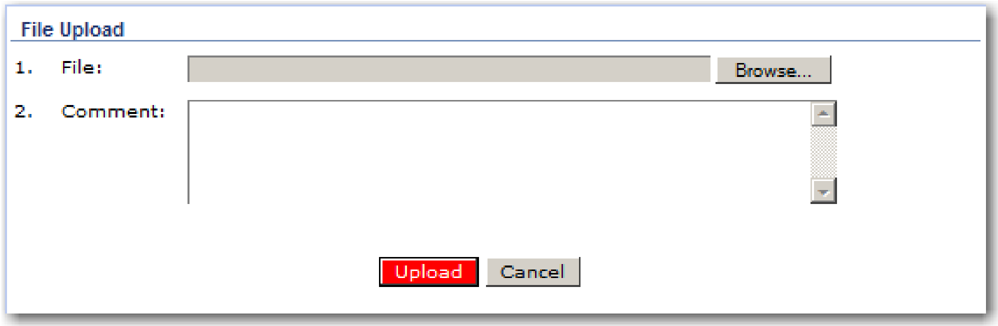
To view an uploaded Menu supporting document

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

To add an Annual Attestation

Note: The Contracting Entity must complete and submit an annual attestation each year.

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



7. Select **Upload** to upload the document and return to the Attestation screen.

8. Enter comments, if necessary.

9. Select **Save**. A confirmation screen displays.

10. Select < **Edit** to return to the Menu screen.

    -OR-

    Select **Finish** to return to the Meal Pattern Compliance Dashboard screen.

TIP: Annual Attestations cannot be added until all menus have been uploaded or previously certified.

To modify an Annual Attestation

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

2. On the menu, select **Application Packet**. The Application Packet screen displays.

3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.

4. Select the **Modify** link next to the Annual Attestation to modify. The Annual Attestation screen displays.

5. Modify any desired information.

6. Select **Save**. A confirmation screen displays.

7. Select < **Edit** to return to the Menu screen.

   -OR-

   Select **Finish** to return to the Meal Pattern Compliance Dashboard screen.

To view an Annual Attestation

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

To modify an uploaded supporting document

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.
4. Select the **Modify** link next to the Annual Attestation to modify. The Annual Attestation screen displays.
5. Select the **Modify** link next to the supporting document to re-upload. The File Upload screen displays providing the ability to Browse and Upload a new document. The new document will replace the existing document.
6. Select **Upload** to upload the document and return to the Attestation screen.
7. Select **Save**. A confirmation screen displays.
8. Select < **Edit** to return to the Annual Attestation screen.
   -OR-
   Select **Finish** to return to the Meal Pattern Compliance Dashboard screen.

To delete an uploaded supporting document

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern

Compliance Dashboard screen displays.

4. Select the **Modify** link next to the Annual Attestation to modify. The Annual Attestation screen displays.
5. Select the **Delete** link next to the supporting document. The File Upload screen displays and a warning message displays.
6. Select the **Delete** button. The Annual Attestation screen displays.
7. Select **Save**. A confirmation screen displays.
8. Select < **Edit** to return to the Menu screen.
   -OR-
   Select **Finish** to return to the Meal Pattern Compliance Dashboard screen.

To view an uploaded supporting document

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

To view Months Certified

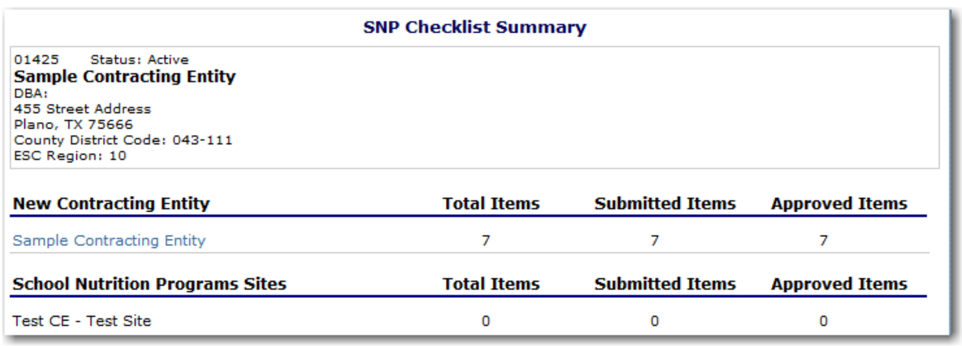
1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Meal Pattern Compliance Dashboard**. The Meal Pattern Compliance Dashboard screen displays.
4. Select the **View** link next to the Months Certified. The Months Certified screen displays.

Checklist

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

To access a Checklist

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



SNP Checklist Summary

01425 Status: Active
Sample Contracting Entity
DBA:
455 Street Address
Plano, TX 75666
County District Code: 043-111
ESC Region: 10

New Contracting Entity	Total Items	Submitted Items	Approved Items
Sample Contracting Entity	7	7	7

School Nutrition Programs Sites	Total Items	Submitted Items	Approved Items
Test CE - Test Site	0	0	0

Figure 27: Checklist Summary Screen

To view a Checklist

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

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

Required Forms/Documents to send to TDA	Document Submitted to TDA	Date Submitted to TDA	Document on File w/TDA	Status	Status Date	Last Updated By
Single Audit Identification Data (H1569)	☐		☐	Pending Approval	02/17/2011	RWESTERMAN
Application for Texas Identification Number (AP-152)	☐		☐	Pending Approval	02/17/2011	RWESTERMAN
Attachment B: Meal Count & Collect Procedures	☐		☐	Pending Approval	02/17/2011	RWESTERMAN
SNP Questionnaire - Compliance with Civil Rights Act of 1964	☐		☐	Pending Approval	02/17/2011	RWESTERMAN
Commodity Agreement	☐		☐	Pending Approval	02/17/2011	RWESTERMAN
FNS Instruction 113-1 (Excerpt)	☐		☐	Pending Approval	02/17/2011	RWESTERMAN
Hazard Analysis Critical Control Points (HACCP) Checklist (FND-104)	☐		☐	Pending Approval	02/17/2011	RWESTERMAN
Local Wellness Policy Checklist (FND-105)	☐		☐	Pending Approval	02/17/2011	RWESTERMAN
Permanent Agreement	☐		☐	Pending Approval	02/17/2011	RWESTERMAN
Proof of IRS 501c3 Tax Exemption	☐		☐	Pending Approval	02/17/2011	RWESTERMAN
Vendor Direct Deposit/Advance Payment Authorization (74-176)	☐		☐	Pending Approval	02/17/2011	RWESTERMAN

Figure 28: Checklist Screen

To update a Checklist

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

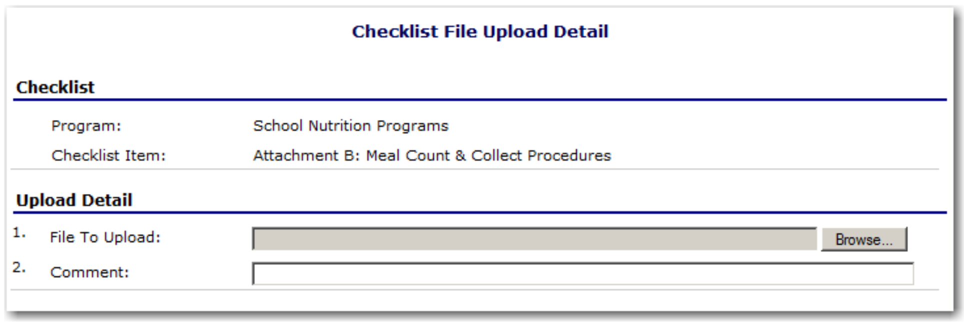


Figure 29: Checklist File Upload Detail Screen

Fresh Fruit and Vegetable Program Application

Contracting Entities invited by the State to participate in the Fresh Fruit and Vegetable Program (FFVP) must complete a Fresh Fruit and Vegetable Program Application. The Fresh Fruit and Vegetable Program Application is accessed from the Application Packet screen; however, it can be submitted outside of the Application Packet.

Note: Only Contracting Entities invited by the State to participate in the Fresh Fruit and Vegetable Program will see a Fresh Fruit and Vegetable Program Application item on their Application Packet screen.

To access and view a Fresh Fruit and Vegetable Program 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. Select View next to the **Fresh Fruit and Vegetable Application** packet item. The Fresh Fruit and Vegetable Program Application for the designated school year is displayed.

To add a Fresh Fruit and Vegetable Program 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. Select Add next to the **Fresh Fruit and Vegetable Application** packet item. The Fresh Fruit and Vegetable Program Application for the designated school year is displayed.
4. Enter the Contracting Entity's Contact Information and select from the invited sites those that are interested in participating in the Fresh Fruit and Vegetable Program.

   Note: Only the sites that the State has invited to participate in the Fresh Fruit and Vegetable Program will display on the screen; this may be a subset of all the sites associated with the Contracting Entity.

5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Fresh Fruit and Vegetable Program Application screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

Packet Assigned To: unassigned

Action	Form Name	Latest Version	Status
View | Revise	✔ Contracting Entity Application	Rev. 1	Approved
Add	Fresh Fruit And Vegetable Program Application		Not Started
Details	Checklist Summary		
Details	Application Packet Notes		

Figure 30: Application Packet Screen – Fresh Fruit and Vegetable Program Application Option

To modify a Fresh Fruit and Vegetable Program 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 Fresh Fruit and Vegetable Program Application packet item. The Fresh Fruit and Vegetable Program Application for the designated school year is displayed.
4. Update desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Fresh Fruit and Vegetable Program Application screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

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

To delete a Fresh Fruit and Vegetable Program 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 Fresh Fruit and Vegetable Program Application packet item. The Fresh Fruit and Vegetable Program Application for the designated school 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.
7. Select **Finish**.

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

Verification Report

Contracting Entities use the Verification Report function to complete and submit the mandatory annual verification report to the State. The verification report contains information about sites collecting applications, site enrollment, eligibility information, and verification results.

To access a Verification Report

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

To complete or modify a Verification Report

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

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

To delete a Verification Report

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

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

Food Safety Inspections

The Food Safety Inspections screen allows Contracting Entities to enter annual food safety inspection information for each of their sites. Food Safety Inspection reports are submitted for the prior year. Hence, during the 2011-2012 year, Contracting Entities are submitting Food Safety Inspection reports for the 2010-2011 year.

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

To access a Food Safety Inspections report

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

To complete or modify a Food Safety Inspections report

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

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

To delete a Food Safety Inspections report

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Food Safety Inspections**. The Food Safety Inspections list screen displays.
3. Select Modify next to the year that you would like to enter data into the Food Safety Inspections screen. The Food Safety Inspections screen for the designated year selected is displayed.

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

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

Summer Nutrition Program Costs

The Summer Nutrition Program Costs screen allows Contracting Entities to enter their total costs related to operating a summer nutrition program.

To access Summer Nutrition Program Costs

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Summer Nutrition Program Costs**. The Summer Nutrition Program Costs list screen displays.

To complete or modify Summer Nutrition Program Costs

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Summer Nutrition Program Costs**. The Summer Nutrition Program Costs list screen displays.
3. Select Modify next to the year that you would like to enter data into the Summer Nutrition Program Costs screen. The Summer Nutrition Program Costs screen for the designated year selected is displayed.
4. Enter information into the screen fields provided.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Summer Nutrition Program Costs screen.
   -OR-
   Select **Finish** to return to the Summer Nutrition Program Costs list screen.

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

To delete Summer Nutrition Program Costs

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

WARNING: Only Summer Nutrition Program Costs reports that have not been submitted can be deleted. Selecting the DELETE button permanently deletes the form from the system. It will not be recoverable once deleted.

Capital Expenditure Request

The Capital Expenditure Request screen allows Contracting Entities to submit capital expenditure requests. Contracting Entities must submit capital expenditure requests for each capital item that is >$5,000. A Contracting Entity may submit as many capital expenditure requests as required in a given year.

To access Capital Expenditure Request

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

To add a Capital Expenditure Request

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Capital Expenditure Request**. The Capital Expenditure Requests list screen displays.
3. Select **Create New Request** button. A blank Capital Expenditure Request screen is displayed.
4. Enter information into the screen fields provided.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Capital Expenditure Request screen.
   -OR-
   Select **Finish** to return to the Capital Expenditure Requests list screen.

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

TIP: The maximum Quantity you may enter is "9,999". The maximum Cost per Item you may enter is "$99,999.99". If this is insufficient, please enter your quantity on multiple lines.

TIP: % Paid by Program Funds should be entered in whole numbers. If the user enters a decimal, upon selecting Save, the system will use normal rounding to derive a whole number.

To modify a Capital Expenditure Request

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Capital Expenditure Request**. The Capital Expenditure Request list screen displays.
3. Select Modify next to the request that you would like to modify data. The Capital Expenditure Request screen for the selected request is displayed.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Capital Expenditure Request screen.
   -OR-
   Select **Finish** to return to the Capital Expenditure Request list screen.

To delete Capital Expenditure Request

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

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

Texas Summer Mandate

By state law, Contracting Entities that meet certain criteria are required to operate a Summer Food Service Program (SFSP), Seamless Summer Option program (SSO) or submit a waiver to the State identifying why they are unable to meet this regulation. The Texas Summer Mandate screen allows Contracting Entities to identify which program they will operate or make a request for a waiver for a specific school year.

To access Texas Summer Mandate

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Texas Summer Mandate**. The Texas Summer Mandate list screen displays.

To complete or modify Texas Summer Mandate

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Texas Summer Mandate**. The Texas Summer Mandate list screen displays.
3. Select Modify next to the year that you would like to enter data into the Texas Summer Mandate screen. The Texas Summer Mandate screen for the designated year selected is displayed.
4. Enter information into the screen fields provided.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Texas Summer Mandate screen.
   -OR-
   Select **Finish** to return to the Texas Summer Mandate list screen.

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

TIP: The Contracting Entity can select one of two options: 1) Operating a summer program or 2) Requesting a waiver from operating a summer program. The questions beneath each option are activated ONLY once the user has selected an option.

To review a Texas Summer Mandate

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Texas Summer Mandate**. The Texas Summer Mandate list screen displays.
3. Select Admin next to the year that you would like to enter data into the Texas Summer Mandate screen. The Internal Use Only section of the Texas Summer Mandate screen for the designated year selected is displayed.
4. Enter information into the screen fields provided.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Texas Summer Mandate screen.

   -OR-

   Select **Finish** to return to the Texas Summer Mandate list screen.

To revise a submitted Texas Summer Mandate

Note: Only state-approved submissions can be revised (i.e., status is "Approved").

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Texas Summer Mandate**. The Texas Summer Mandate list screen displays.
3. Select Revise next to the year to be updated. The Texas Summer Mandate screen with the most current version of the form is displayed.
4. Modify the screen fields as desired.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Texas Summer Mandate screen.

   -OR-

   Select **Finish** to return to the Texas Summer Mandate list screen.

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

Note: The Texas Summer Mandate list screen will now have a "+" sign next to the entry with multiple versions. The default display is the most current version; however, by selecting the "+" sign, the user can see all versions for the respected School Year.

+	Action	School Year	Received Date	Latest Version	Status
+	View | Modify | Admin	2012 - 2013	12/05/2012	Rev. 1	Submitted
	View | Admin	2011 - 2012	01/16/2012	Original	Approved

Figure 31: Sample of Multiple Versions on the Texas Summer Mandate List Screen

To delete Texas Summer Mandate

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

WARNING: Only Texas Summer Mandate forms that have not been submitted can be deleted. Selecting the **DELETE** button permanently deletes the form from the system. It will not be recoverable once deleted.

Direct Certification/Direct Verification

The Direct Certification/Direct Verification provides authorized users access to the Direct Certification/Direct Verification system from within TX-UNPS.

To access Direct Certification / Direct Verification

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Direct Certification/Direct Verification**. The Direct Certification/Direct Verification screen displays.
3. Select the **<Back** button to return to previous screen.

Figure 32: Direct Certification / Direct Verification Screen

Note: By selecting the **Direct Certification / Direct Verification** link on this screen, a new browser window will open providing access to the Direct Certification/Direct Verification system.

The screen will not open if you have a pop-up blocker running on your system. If this occurs, hold down the **CTRL** key and select **Direct Certification / Direct Verification** again.

Your TX-UNPS browser session will remain active until the system times out (i.e., 20 minutes). If using the Direct Certification/Direct Verification system takes longer than 20 minutes, you will need to re-login to TX-UNPS.

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**. The Applications menu screen displays.
2. On the menu, select **Download Forms**. The Download Forms screen displays.

To download or view a form

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the 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 Contracting Entity?
SNP-008	FND-119 - Assisted Nutrient Standard Menu Planning ANSMP) Application	12/08/2010	
SNP-009	H1569 - Single Audit Identification Data	12/08/2010	
SNP-010	Questionnaire - Compliance with Civil Rights Act of 1964	12/08/2010	
SNP-011	AP-152 - Application for Texas Identification Number (TIN)	12/08/2010	
SNP-012	74-176 - Vendor Direct Deposit/Advance Payment Notification Authorization	12/08/2010	
SNP-013	FND-105 - Local Wellness Policy Checklist	12/08/2010	

Figure 33: Download Forms Screen

TIP: The New Contracting Entity? column indicates whether the form is required for submission by Contracting Entities new to the School Nutrition Programs.

4

Claims

The TX-UNPS Claims component allows Contracting Entities to submit monthly online reimbursement claim requests to the State, review claim rates, and review historical payment summaries.

About the Claims Process

A Contracting Entity submits a reimbursement claim to the State for every month in which one or more sites participates in the School Nutrition Programs. Contracting Entities may enter Contracting Entity and site information into the monthly claim form beginning at the first of every month. Contracting Entities 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 TX-UNPS Help Desk to validate the effective date of the Contracting Entity 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
Contracting Entity	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

Contracting Entities use the Claims Menu to access claim functions, view current claim rates, or view payment summaries.

Item	Description
Claim - SNP	School Nutrition Program Claims
Claim - SSO	Seamless Summer Option Claims
Claim - FFVP	Fresh Fruit and Vegetable Program Claims
Claim Rates	View current claim rates
Payment Summary	Summary of payments made to this Contracting Entity

Figure 34: Claims Menu

Claim Dates

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

Date	Description
Date Created	This date is set to the current system date when the claim is initially created.
Date Modified	This date is set to the current system date when the claim is initially created and each time the claim is saved.
Date Received	This date is typically set to the date the claim was first submitted to the State. The date can be changed by an authorized State user via the Internal Use Only section of the claim form until the claim has been processed for payment. The value of this field is used to validate the 60 day claim rules.
Date Accepted	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.
Date Processed	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.

Claim Entry

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

WARNING: Only Contracting Entities authorized by the State can submit site-level claims. Please contact the TX-UNPS Help Desk if you are interested in site-level claiming.

To access Claim Entry

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

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

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

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

Figure 35: 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: September 2010

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View | Summary	0	02/02/2011	02/02/2011	02/02/2011	$37,843.34	Processed
View | Summary	1	02/02/2011	02/02/2011	02/03/2011	($7.76)	Processed
				Total Earned	$37,835.58	

Figure 36: 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: August 2010

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View | Modify | Summary	0	11/30/2010	01/26/2011		$109.55	Accepted
				Total Earned	$109.55	

Figure 37: 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

If the Contracting Entity has been identified by the State as performing site-level claiming on the Contracting Entity Profile screen, the Contracting Entity would use the Claim Site List screen to select the site whose claim to add, view, or modify.

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

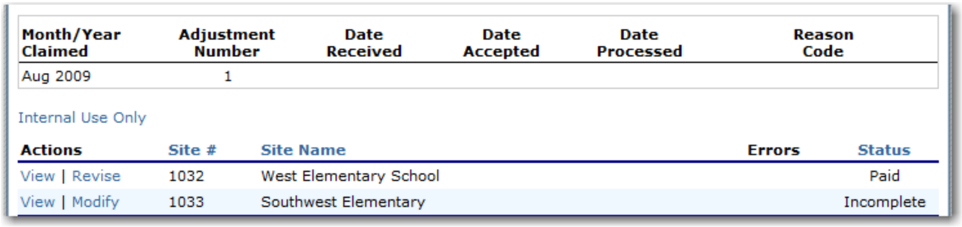


Figure 38: Claim Site List Screen

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 Contracting Entity and Site applications).

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

2. Select the desired Claim Month. The Claim Month Details screen displays.

3. Select **Add Original Claim** button. If the Contracting Entity is performing CE-level claiming, the Claim for Reimbursement screen displays.

   If the Contracting Entity is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Add** to the left of the Site Name you wish to add an original claim. The Claim for Reimbursement screen displays.

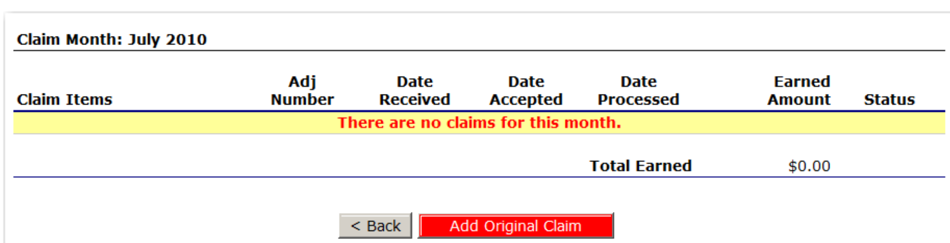


Figure 39: Claim Month Details screen – Add Original Claim

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

4. Enter claim information for all enrolled programs. Only the programs identified in an approved Application Packet with the appropriate effective date will be available for data entry.

5. Select **Save**. The Claim Month Details screen displays.

6. Review the information.

   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., 60 day rule, etc.). If the system identifies errors, the errors must be corrected before the user can submit the claim for payment.

> **WARNING**: An original claim cannot be submitted by a Contracting Entity if the received date is more than 60-days since the last day of claim month/year. For exceptions to this rule, contact the TX-UNPS Help Desk.

To modify an un-processed claim

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

1. From the Claims menu, select the type of claim you would like to view (e.g., SNP, SSO or FFVP). The Claim Year Summary screen displays.

2. Select the desired Claim Month. The Claim Month Details screen displays.

3. If the Contracting Entity is performing CE-level claiming, select **Modify.** The Claim for Reimbursement screen displays.

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

Claim Month: October 2010

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

Figure 40: Claim Month Details screen – Modify an Un-processed Claim

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

4. Update claim information.

5. Select **Save**. The Claim Month Details screen displays.

6. Review the information.

   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., 60 day rule, etc.). If the system identifies errors, the errors must be corrected before the user can submit the claim for payment.

WARNING: An original claim cannot be submitted by a Contracting Entity if the received date is more than 60-days since the last day of claim month/year. For exceptions to this rule, contact the TX-UNPS Help Desk.

To revise a processed Contracting Entity-level claim

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

1. From the Claims menu, select the type of claim you would like to enter (e.g., SNP, SSO or FFVP). The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Contracting Entity is performing CE-level claiming, select **Add Revision** button. The Claim for Reimbursement screen displays.

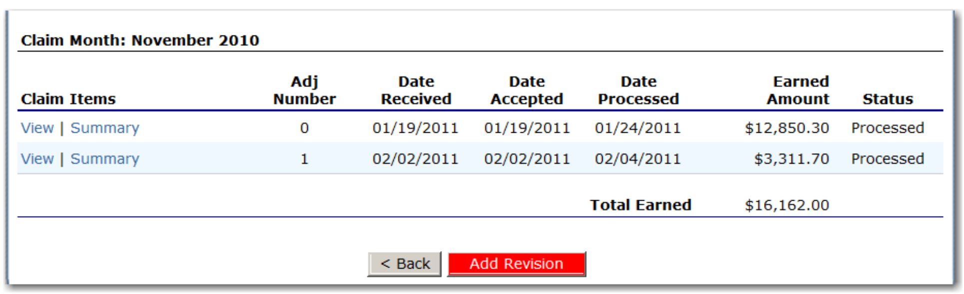


Figure 41: Claim Month Details Screen – Add Revision

If the Contracting Entity 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**. The Claim Month Details screen displays.
6. Review the information.

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

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.

WARNING: An upward adjusted claim cannot be submitted by a Contracting Entity if the received date is more than 60-days since the last day of claim month/year. For exceptions to this rule, contact the TX-UNPS Help Desk.

To view a claim

1. From the Claims menu, select the type of claim you would like to view (e.g., SNP, SSO or FFVP). The Claim Year Summary screen displays.

2. Select the desired Claim Month. The Claim Month Details screen displays.

3. If the Contracting Entity is performing CE-level claiming, select **View.** The Claim for Reimbursement screen displays.

   If the Contracting Entity 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.

1. From the Claims menu, select the type of claim you would like to view (e.g., SNP, SSO or FFVP). The Claim Year Summary screen displays.

2. Select the desired Claim Month. The Claim Month Details screen displays.

3. If the Contracting Entity is performing CE-level claiming, select **Summary.** The Claim for Reimbursement Summary screen displays.

   If the Contracting Entity 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

Month/Year Claimed	Adjustment Number	Date Received	Date Accepted	Date Processed	Reason Code
Nov 2010	0	01/19/2011	01/19/2011	01/24/2011	Original

Contracting Entity Totals

Meal Type	Meals/Supplements Served	Federal Rate	Reimbursement Federal Amount
National School Lunch Program			
Free	2,711	2.7400	7,428.14
Reduced	620	2.3400	1,450.80
Paid	1,568	0.2800	439.04
Total	**4,899**		**9,317.98**
School Breakfast Program Severe Need			
Free	1,710	1.7600	3,009.60
Reduced	251	1.4600	366.46
Paid	601	0.2600	156.26
Total	**2,562**		**3,532.32**
Claim Reimbursement Total			**12,850.30**

Figure 42: Claim for Reimbursement Summary Screen

To delete a claim

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

1. From the Claims menu, select the type of claim you would like to view (e.g., SNP, SSO or FFVP). The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Contracting Entity is performing CE-level claiming, select **Modify.** The Claim for Reimbursement screen displays.

   If the Contracting Entity is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Modify** to the left of the Site Name you wish to view. The Claim for Reimbursement screen displays
4. Select **Delete** in the Edit menu in the upper-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**.

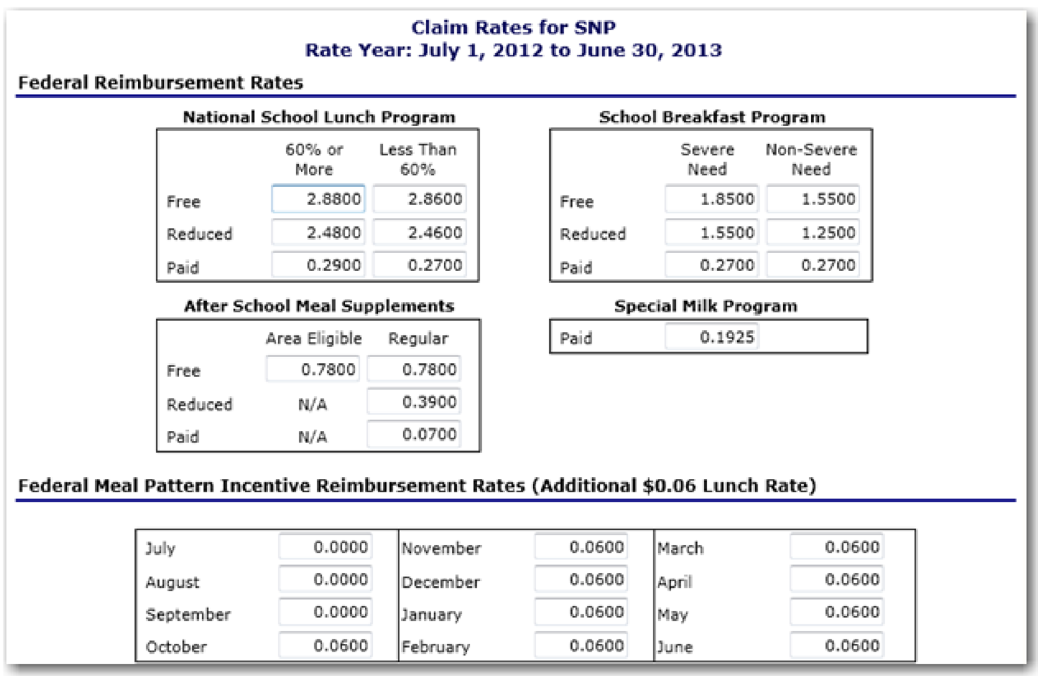
WARNING: Once the claim has been deleted, it is permanently removed from the application and cannot be restored. Use caution before deleting a claim.

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 TDA 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 SNP
Rate Year: July 1, 2012 to June 30, 2013

Federal Reimbursement Rates

National School Lunch Program

	60% or More	Less Than 60%
Free	2.8800	2.8600
Reduced	2.4800	2.4600
Paid	0.2900	0.2700

School Breakfast Program

	Severe Need	Non-Severe Need
Free	1.8500	1.5500
Reduced	1.5500	1.2500
Paid	0.2700	0.2700

After School Meal Supplements

	Area Eligible	Regular
Free	0.7800	0.7800
Reduced	N/A	0.3900
Paid	N/A	0.0700

Special Milk Program

Paid	0.1925

Federal Meal Pattern Incentive Reimbursement Rates (Additional $0.06 Lunch Rate)

July	0.0000	November	0.0600	March	0.0600
August	0.0000	December	0.0600	April	0.0600
September	0.0000	January	0.0600	May	0.0600
October	0.0600	February	0.0600	June	0.0600

Figure 43: Claim Rates for SNP Screen

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

Payment Summary

The Payment Summary screen provides a list of all payment batch schedules processed for the Contracting Entity 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
11020401	02/04/2011		$ 3,311.70	$ 0.00	$ 3,311.70
11012402	01/24/2011		$ 12,850.30	$ 0.00	$ 12,850.30

Figure 44: Payment Summary List Screen

To view a Payment Summary

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

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

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

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

Figure 45: Payment Summary Screen

5

Reports

Standard Reports for the School Nutrition Programs are available to users through the TX-UNPS Reports component.

About Reports

The Reports component of the SNP module enables users to run, view, and print reports containing data maintained within TX-UNPS. The Report List contains all reports available within the SNP module. Once a user selects a particular report, TX-UNPS 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.

6

Security

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

Security menu

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

To access the Security menu

1. Select **Security** on the blue menu bar at the top of the page.
   The Security menu displays.
2. Select a security item to access that security function.

To access Change Password

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.

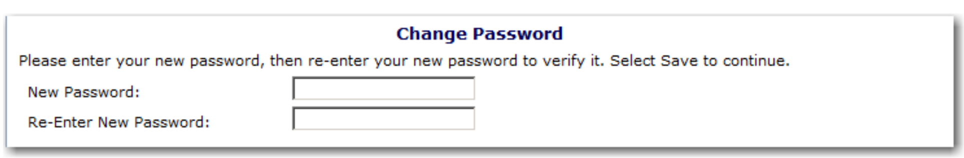


Figure 46: Change Password Screen

Note: Security configuration settings require a password ten (10) to twelve (12) characters in length. Please note that the password must be at least ten (10) characters in length. The password must contain at least one number, one letter, and one special character (e.g., !, ?, /). Passwords are case sensitive.

7

Application Packet Process

This section of the manual provides information on how the State can review and approve Application Packets *through TX-UNPS.*

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

Submitting an Application Packet

All new enrollment or renewal enrollment applications are initially created with a status of “Pending Validation”. Once the Application has been saved, the systems 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 Contracting Entity 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 Contracting Entity.

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

Note: Once an application packet has been submitted by the CE to the State, the system will automatically send an email to the assigned State Application Packet Consultant. A copy of the email is also to the Contracting Entity's Child Nutrition Director as specified on the Contracting Entity Application.

Once the Contracting Entity 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 Contracting Entity for correction.

If the Application Packet is denied or returned to the Contracting Entity 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.

Note: Once an application packet has been approved, denied, or returned by the State, the system will automatically send an email to the Contracting Entity's Child Nutrition Director, as specified on the Contracting Entity Application, providing status of the 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 Contracting Entity 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 Contracting Entity.
  - 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 Contracting Entity 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 Contracting Entity 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 Contracting Entity 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 Contracting Entity has submitted the Application Packet to the State for review (i.e., the Contracting Entity 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 Contracting Entity 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 Contracting Entity. 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 Contracting Entity 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 Contracting Entity 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., Contracting Entity or site is not authorized on the Application Packet to operate for the selected month or the Application Packet status is not "Approved").
- Incomplete
  - The claim has a status of "Incomplete" when the claim has been created in the system but the **Save** button was never clicked (e.g., timeout, logout, etc.). The system saves the data that has been entered, but no edits have been performed.
- Error
  - The claim has a status of "Error" when the claim has been submitted and has business rule violations.
- Pending
  - The claim has a status of "Pending" when the claim has been saved and on-line edits have been performed, but the claim has not been submitted and validated with additional edits (e.g., 60 days edit, etc.).
  - Applicable only when the Contracting Entity is participating in CE-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 Contracting Entity 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., 60 days edit, etc.), and is ready to be included in the payment tracking process.
  - The claim can still be modified. A revision is not necessary until the claim is included by the State in a batch payment process.
- Accepted*
  - The claim has a status of "Accepted*" when the claim has been selected by the State for inclusion in the batch payment process; however, the batch process has not run.
  - The claim cannot be modified. If the claim requires a change, a revised claim must be submitted.
- Processed
  - Claim has been fully processed by TDA and has been sent to the State's Accounting Office for disbursement of funds.