**Everything Food Service**

What is this?

It's documentation for every Food Service related question we've been asked and all documentation that's been created. It includes what Food Service **directors** (typically) should be doing on a daily/weekly/monthly basis, what role **office staff** plays in Food Service, options for purchases, payments and reports, what role the **MSDS submitter** plays, a Verification and Application guide, eligibility and reimbursement reports, and most anything else that's ever come up

Below are links to the different areas covered in the documentation. If you can't click on a link, do the following:

1. In the upper left-hand corner of Word, click on **File**
2. From the **File** menu, select **Options**
3. On the left-hand side, click on the **Advanced** tab
4. **Uncheck** the option to **Use CTRL + Click to follow hyperlink**
5. At the bottom of the screen, click on **OK**
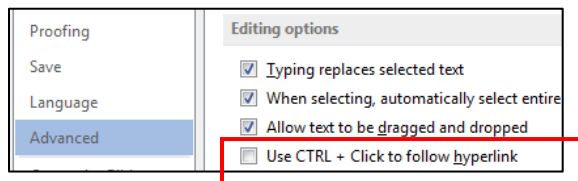
Clicking on a link will take you to the appropriate section in this document. Each section will have additional links that will take you to the referenced document

- Applications Related
- Verification Related
- Reimbursement Related
- Free and Reduced Rosters
- AR Review Related
- Purchase Related
- Payment Related
- Daily/Monthly counts Related
- General Food Service Reporting
- FS Director
  - Food Service Tasks and When to Perform Them
  - Year End Tasks for FS Directors
  - Year Start Tasks
- Item Master Related
- Food Service ID/Barcode Related
- Cashier/POS Related
- Office Related
- Miscellaneous
  - Customers vs. Payors

Summary of all Documentation

Applications Related: this section is primarily for the person entering Food Service applications for your district. However some of the information here may useful to others

- • **(03) Application Guide:** This is a check-off sheet of things that need to be done in order to prepare for the new school year and application entry
- • **(03a) What Information is needed for Which Type of Application**: This document is a refresher on what type of information to include for each Lunch Code, based on the type of application you're processing. It's important that this format be followed, as it makes it easier when trying to troubleshoot Skyward FS issues. Information also needs to be entered exactly like this for Verification purposes. See individual documentation for step-by-step instructions on processing the different types of applications
- • **(03b) Adding Direct Cert to a Student's FS Account**: provides step-by-step instructions on how to extend DC eligibility from a student that was on the DC list to one that was not on the list but is also eligible
- • **(03c) Adding Homeless Status to a Student's FS Account**: provides step-by-step instructions on how to add Homeless status to a student's Food Service account
- • **(03d) Entering a Food Stamp Application**: provides step-by-step instructions for processing a Food Stamp application
- • **(03e) Entering a Foster Child Application**: provides step-by-step instructions for processing a Foster Child application
- • **(03f) Entering an Income Eligible Application**: provides step-by-step instructions for processing an Income Eligible application
- • **(03g) Creating an Application for Multiple Household Students**: provides an alternate option for creating 1 application and adding all students to it, as opposed to creating an application for an individual student and cloning it to others
- • **(03h) How to load Direct Cert files into Skyward**: this document provides step-by-step instructions on how to load the CEPI Direct Cert file into Skyward
- • **(03i) Printing Application Letters for all processed applications**: this document provides instruction on printing notices for free/reduced eligibility after you've processed a batch of applications
- • **(03j) Printing Application Letters for an individual student**: This document is for the person providing audit documentation for the AR Review. It shows how to get a copy of the different application letters needed for your review. For example, the DC notification letter. The process can also be used if you need to reprint applications for individual students
- • **(03k) Emailing Application Letters**: provides instruction on emailing application letters. **Note**: letters will be emailed where the guardian has an email listed in the system. For those that don't have an email, the email process will produce a letter that can be printed

- **(04a) Expiring Applications**: this document includes instructions on how to print a report of students that don't have a current year application and will expire after the 30 day carryover, as well as how to print the actual letters that will be sent to the parent/guardian
- **(04b) USDA Non-Discrimination Statement and Application Letters**: this provides some information on the USDA Statement for Food Service letters, as well as some options for printing letters
- **(04c) How to Update Application Letters**: this document includes instruction on how to change the verbiage in the letters that get sent home for notification of eligibility
- **(04d) How to Update Application Letter Templates**: this covers how to update the Application templates that tell the system who to print the eligibility letters for
- **(05) Messages You Get During the Application Process**: this document covers some of the pop-up messages you get during the application process, along with an explanation of what they mean
- **(06) 30 Day Carryover Eligibility**: this document is for anyone that wants to know how the 30 day carryover eligibility works for free/reduced eligible students
- **(20) Sync Payor Status Audit**: this utility updates the Active/Inactive status for Food Service Customers. If a student exits the district, their FS record may still be active. Running this utility will inactivate any students without an active enrollment record, which helps clean up your Food Service data. It should also be run prior to running the **(22) RESA FS Customer Control vs. Application Report**, which will tell you if there are any Lunch Code discrepancies
- **(21) RESA FS Application Lunch Code Errors**: this document provides instruction on running a report in order to see if there are any issues with the data you've entered in any current year applications. It should be run after processing a number of applications, and before monthly reimbursement claims are submitted, and before the Verification process is started
- **(22) RESA FS Customer Control vs. Application Report**: this report should be run prior to submitting your monthly claim for reimbursement, as it will show any inconsistencies with a customer's Application Lunch Code and their Customer Control Record Lunch Code. While these should be the same, they're not always. . It should be run after processing a number of applications, before monthly reimbursement claims are submitted, and before the Verification process is started

Verification Related: this section would be for the person in your district that performs the Verification process for Free and Reduced applications
- **(07) Verification Guide**: this is a check off sheet of things that need to be done to prepare for the Verification process
- **(07a) Updating Verification Letters**: provides step-by-step instructions on how to update the verbiage in Food Service letters pertaining to Verification
- **(07b) Updating Verification Letter Templates**: provides step-by-step instructions on how to update Food Service letter templates, which tell the system who to print the letters for, pertaining to Verification
- **(20) Sync Payor Status Audit utility**: should be run prior to running the next reports, which should be run prior to starting the Verification process
- **(22) RESA FS Customer Control vs. Application report**: should be run prior to the verification process to identify any lunch code issues
- **(21) RESA FS Lunch Code Errors report**: should be run prior to the verification process to identify any application issues
- **(07c) Verification Process**: provides step-by-step instructions for initiating the Verification process and printing the letters/notices

- **(07d) Recording Verification Responses**: provides step-by-step instructions on recording Verification responses
- **(07e) Sending Verification Response Letters**: provides step-by-step instructions on printing the Verification response letters
- **(07f) Completing Verification**: provides instruction on closing out the Verification process
- **(07g) Running Reports for Verification**: provides instructions on what reports to run after the verification process has been completed

Reimbursement Related: this section is for anyone involved in running reports and/or submitting the monthly reimbursement claim information
- **(32) Reports to run to obtain Reimbursement Claim information**: this document is for Food Service directors and/or person submitting monthly reimbursement claim, and covers how to most easily obtain the needed information in order to submit your monthly reimbursement claim. It only requires you to run 2 different reports
- **(34c) Installing Crystal Reports Viewer in Order to Run Custom Reports**: in order to run the RESA FS Monthly Summary report, and to be able to adjust it as needed, you need to have the Crystal Reports Viewer installed on your computer. If you have the ability to install software on your machine, follow these instructions. Otherwise, your IT person will need to install it. This only needs to be installed once.
- **(33) Lunch Code Totals by Day Report**: provides, for a specific day, the number of free/reduced/paid students by building. Can also be run to include names
- **(34a) RESA FS Monthly Summary Report**: provides monthly summary information, by building, for purchases and payments. In order to hide the transaction details you'll need to have the **(34c) Crystal Viewer** installed on your computer. It should be run with Details on, and saved to your network drive every month. This is the information you'll possibly need for future audits
- **(34d) Customizing the RESA FS Monthly Summary to your Needs:** provides instruction on how to use the RESA Monthly Summary report to get only specific information you need
- **(35) RESA FS Reimbursement Summary by School**: provided you gave SIS Team your reimbursement rates per school, you can run this report to verify it against your reimbursement claim. It will tell you, by school, what you should be getting from your reimbursement claim, as well as the numbers to report

Free & Reduced Rosters: these are the reports used/ways to get Free/Reduced/Paid eligibility counts
- **(28) Free and Reduced Rosters with Grades and Buildings**: run this to produce a list of F/R/P students, along with their enrolled grades and buildings they attend
- **(29) AR Review Benefit Issuance List**: this data mining report will produce all the needed information for the AR Review. Includes: student name, grade, school, lunch code, effective date and eligibility method. The eligibility method tells if the student is eligible due to an application being submitted, being direct certified or categorically eligible. This can be determined by the associated lunch code
- **(33) Lunch Code Totals by Day:** run this for a specific date to see F/R/P and Total building eligibility counts. Can be run with detail to get student names or with totals only
- **(31) Lunch Codes with Grade Level**: provides instruction on how to create a report of Free/Reduced/Paid students, along with their grade level

AR Review Related: provides instruction on how to obtain the information needed for the Food Service AR audit

- **(29) AR Review Benefit Issuance List**: this data mining report will produce all the needed information for the AR Review. Includes: student name, grade, school, lunch code, effective date and eligibility method. The eligibility method tells if the student is eligible due to an application being submitted, being direct certified or categorically eligible. This can be determined by the associated lunch code
- **(65) Income Eligibility Guidelines**: provides instruction on how to get the Income Eligibility Guidelines used by Skyward
- **(03j) Printing Copies of Various Application Letters**: provides instruction on how to get a copy of the different application letters needed for your review. For example, the DC notification letter

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Purchase Related: this section contains all purchase-related documentation

- **(36) Purchases – Everything you need to know**: gives an overview of the ways purchases can be recorded, corrected and reported

Recording Purchases:

- **(37a) Purchase Entry by Homeroom – Elementary Teachers**: for districts where teachers record breakfast served in the classroom, this provides instruction on how to record purchases
- **(37b) Purchase Entry by Homeroom – anyone other than Teachers**: provides information on using Purchase Entry by Homeroom to ring up transactions. Typically used for breakfast in the classroom
  - **(37c) How to Print Purchase Entry by Homeroom Class List**: provides instructions on how to print rosters, based on the Purchase Entry by Homeroom screen, to easily check off and record purchases using the Purchase Entry by Homeroom method
- **(37d) Recording GSRP meals:** used in districts where GSRP students are served meals and purchases are record at a later time/date. This document provides instruction on how to record GSRP meals served
- **(30) Grandparent meals:** this document is for districts that have Grandparent volunteers who get a free meal for volunteering. It covers how to set up the item in the Item Master, how to serve the meal, and how to report the meals served to submit to the district for reimbursement
- **(45a) Visitor Accounts**: discusses Visitor accounts, which are used in the cafeteria line for customers that don't have their own FS account

Modifying Purchases:

- **(38a) Fixing purchases from within the POS – Cashiers**: shows cashiers how to remove purchases recorded from within the POS
- **(39) 2nd Meals Served**: this document is typically for Food Service directors and covers how to run a utility to mass remove 2nd meals
- **(40) Remove ALL Purchase Records without Purchases**: This document is for the Food Service director and covers some cleanup steps to remove 0 quantity purchases from Food Service accounts
- **(19) Change Customer Purchase Cafeteria**: shows how to correct purchases recorded on the wrong register/at the wrong building
- **(18) Remove Customer Purchases and Payments**: if it's discovered that purchases/payments were recorded on a student's account that shouldn't have been, you can run this utility to mass remove all transactions from that account. A typical scenario for using this would be when a student is typing in the wrong ID and meals are being reported for an Inactive student. You might not know

who is using the number, but you need to remove the purchases from the account that did not receive them

Troubleshooting Purchases:
- **(41a) Purchase Transactions Log Report:** used to run a chronological purchase report by date/cafeteria or user. Typically used to troubleshoot issues

Limiting Purchases:
- **(43a) Wanding Messages**: provides instructions on adding individual messages to a student's account. Wanding messages come up every time the account is brought up
- **(43c) Customer Wanding Messages Report**: run this report to see a list of all customers that have Wanding Messages associated with their Food Service accounts
- **(43b) Stop ALL Purchases or ALL ala Carte Purchases:** provides instructions on how to stop all purchases for a student, or just ala Carte purchases. Stop Purchases alerts only come up when trying to serve something that has been stopped

Purchases for adults that don't have a Food Service account:
- **(45a) Visitor Accounts**: discusses Visitor accounts, which are used in the cafeteria line for customers that don't have their own FS account
- **(45b) Creating Food Service Staff/Adult Customers:** provides instruction on creating a Staff/Adult Food Service account

Fixing account information so that purchases are reported/charged appropriately
- **(46) Price Category Audit**: provides a list of students that have an incorrect Price Category. This will result in students being charged the wrong amount in the cafeteria line. This utility also allows you to mass change any transactions that were recorded
- **(17) Changing Default Cafeterias:** provides instruction on how to change the Default Cafeteria for a customer whose purchases may be displaying in the wrong building on some Food Service reports

Reporting Purchases:
- **(48) Daily Charge/Credit Report**: this report provides either Detail or Summary Purchase, Payment, Charges, and Credits information for a specified date/date range
- **(49) Daily Activity Report**: this document discusses the Daily Activity Report, which districts ran prior to the **(34b) RESA FS Daily Summary** report being created. **(34b)** provides most information in one report and can be used in place of the Daily Activity Report
- **(34a) RESA FS Monthly Summary Report**: used to obtain monthly meal counts. Can be used in place of the Skyward Accuclaim report
- **(34d) Customizing the RESA FS Monthly Summary to your Needs:** provides instruction on how to use the RESA Monthly Summary report to get only specific information you need
- **(25a) Payor-Customer Meal Statements – FS Director**: these are the detail reports for a specified student. They show the entire year's history of purchases and payments. Typically given to parents questioning an account. This option would be used by the FS Director and/or anyone else that has access to Food Service Customers
- **(25b) Payor-Customer Meal Statements – Cashiers**: these are the detail reports for a specified student. They show the entire year's history of purchases and payments. Typically given to parents

questioning an account. This option would be used by the cashiers or anyone else that doesn't have access to Food Service Customers

- **(26) Teacher Payor Balance List:** for districts that have homerooms set up, provides instructions on running a report of students, by teacher, to be given to the classroom teacher. Typically used when teachers follow up on students' negative balances or need to know balances for a specific reason
- **(23) Lunch Code Totals for Purchases by Day**: provides a breakdown, by building and register, of **meal** items purchased by different pay types on a specified date. Typically used when meals are recorded after the fact to make sure the numbers look right. For example: GSRP meals are recorded once a week. You could run this report for the month to make sure your numbers look right for each day. It does not total the meals, so you would run the **(37e) Reporting GSRP Meals** report to get your monthly F/R/P count of meals served
- **(24c) Reporting Lunch Survey Results**: provides instructions on how to print the lunch survey results recorded by classroom teachers
- **(37e) Reporting GSRP Meals**: for districts that have, and serve, GSRP students, this document provides instruction on reporting GSRP meals by Lunch Code. This report can then be submitted to the district for reimbursement
- **(30) Grandparent meals:** this document is for districts that have Grandparent volunteers who get a free meal for volunteering. It covers how to set up the item in the Item Master, how to serve the meal, and how to report the meals served to submit to the district for reimbursement

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Payment Related: this section contains all payment-related documentation

- **(10) Payments and Account Balances – everything you need to know**: gives an overview of the different options for recording or adjusting payments on a student's account, as well as common reporting options for payments and account balances

Recording Payments:
- **(11) Payment Entry module**: provides information on recording payments using the Payment Entry module. Typically used when payments are recorded outside of the POS line
- (**37b) Purchase Entry by Homeroom – anyone other than teachers**: provides instruction on recording meals and/or payments using the Purchase Entry by Homeroom option
- **(38b) Recording Payments in the POS**: this document is for cashiers and covers how to record payments from within the POS

Modifying Payments:
- **(16a) Adjusting a Food Service Account Balance**: use this document when you need to make an adjustment to a student's account and where no money will be exchanging hands
- **(16b) Correcting a Payment Recorded on the Wrong FS Account**: use this document when a payment was mistakenly recorded on one account but should have been put on another
- **(16c) Correcting a Payment recorded for the wrong amount**: use this document when a payment was recorded for the wrong amount and needs to be corrected
- **(16d) Refunding Money from a Food Service Account**: use this document when a parent is requesting a refund from a student's FS account
- **(16e) Splitting Payments Mistakenly Recorded on One Student's Account**: use this document when an entire payment was applied to one student's account but should have been split among multiple

- **(16f) Transferring Money from One FS Account to Another**: use this document when a parent has requested that all or part of a balance be transferred from one student to another
- **(27) Update Prior Balance Utility:** allows you to move prior balances from Inactive students to active siblings and/or zero out prior year balances
- **(18) Remove Customer Purchases and Payments**: if it's discovered that purchases/payments were recorded on a student's account that shouldn't have been, you can run this utility to mass remove all transactions from that account. A typical scenario for using this would be when a student is typing in the wrong ID and meals are being reported for an Inactive student. You might not know who is using the number, but you need to remove the purchases from the account that did not receive them

Troubleshooting Payments:
- **(41b) Payment Transactions Log Report:** used to run a chronological Payment report by date/cafeteria or user. Typically used to troubleshoot issues
- **(12) Check Deposits Report**: used to view recorded deposits for any selected day/date range. Typically used for troubleshooting when the cash drawer is off, or when a parent says their student made a payment that day. In this scenario, you can look to see if the payment may have been made on someone else's account by mistake

Fixing account information so that payments are reported appropriately
- **(13) Change Payor Balance Notice Indicator**: by default, when an adult Food Service account is created, the account is set to not print balance notices. Prior to printing negative balance notices, this utility should be run so that notices print for all customers specified

Reporting Payments:
- **(34a) RESA FS Monthly Summary Report**: provides details and summary information for all payments recorded, broken down by building and pay type
- **(34b) RESA FS Daily Monthly Summary Report**: provides summary information of payments recorded, broken down by building and pay type
- **(34d) Customizing the RESA FS Monthly Summary to your Needs:** provides instruction on how to use the RESA Monthly Summary report to get only specific information you need
- **(48) Daily Charge/Credit Report**: this report provides either Detail or Summary Purchase, Payment, Charges, and Credits information for a specified date/date range
- **(47) Daily Income, Sales and Deposit Report:** provides summary payment and purchase information, broken down by building by day. However, ala Carte purchases are not broken out by student/adult. You can run the **RESA FS Daily (34b)** or **Monthly (34a) Summary Reports** to get this information, as well as additional information needed for reporting
- **(14) Payor Balance Notices**: these are the notices that you can print (or email) to let parents know their student has a negative account balance
- **(15) Payor Balance Summary**: run this report to generate a list of students with a specified account balance. Typically used to see students that have negative account balances
- **(25a) Payor-Customer Meal Statements – FS Director**: these are the detail reports for a specified student. They show the entire year's history of purchases and payments. Typically given to parents questioning an account. This option would be used by the FS Director and/or anyone else that has access to Food Service Customers

- **(25b) Payor-Customer Meal Statements – Cashiers**: these are the detail reports for a specified student. They show the entire year's history of purchases and payments. Typically given to parents questioning an account. This option would be used by the cashiers or anyone else that doesn't have access to Food Service Customers
- **(26) Teacher Payor Balance List**: for districts that have homerooms set up, provides instructions on running a report of students, by teacher, to be given to the classroom teacher. Typically used when teachers follow up on students' negative balances or need to know balances for a specific reason
- **(42) Reports by Payor, Customer, School**: typically used to report building payments separately when all payments were recorded (mistakenly or intentionally) in one building
- **(12) Check Deposits Report**: used to view recorded deposits for any selected day/date range. Typically used for troubleshooting when the cash drawer is off, or when a parent says their student made a payment that day. In this scenario, you can look to see if the payment may have been made on someone else's account by mistake
- **(44b) Master Sales Activity Report**: covers how to run a master report to see if the cashier's cash drawers are under/over/balanced

Daily/Monthly Counts Related:
- **(34b) RESA FS Daily Summary Report**: used to obtain daily meal and ala carte counts. Can be used in place of the Skyward Accuclaim and/or Daily Activity report. Provides a breakdown of ala Carte sales by pay type, which Skyward's reports don't do
- **(34a) RESA FS Monthly Summary Report**: used to obtain monthly meal and ala carte counts. Can be used in place of the Skyward Accuclaim report
- **(34d) Customizing the RESA FS Monthly Summary to your Needs**: provides instruction on how to use the RESA Monthly Summary report to get only specific information you need
- **(32) Reports to Run to Obtain Your Monthly Reimbursement Information**: run this to get the highest Free/Reduced numbers for the month. You can run it for every month but October, when you MUST report numbers based on the October 31st date. For October, use the **(33)Lunch Code Totals by Day report**
- **(33) Lunch Code Totals by Day Report**: run this for your eligibility counts for your monthly reimbursement claim
- **(31) Lunch Codes with Grade Level**: provides instruction on how to create a report of Free/Reduced/Paid students, along with their grade level
- **(23) Lunch Code Totals for Purchases by Day**: provides a breakdown, by building and register, of **meal** items purchased by different pay types on a specified date. Typically used when meals are recorded after the fact to make sure the numbers look right. For example: GSRP meals are recorded once a week. You could run this to check your numbers before submitting your reimbursement claim
- **(24c) Reporting Lunch Survey Results**: provides instructions on how to print the lunch survey results recorded by classroom teachers
- **(37e) Reporting GSRP Meals**: for districts that have, and serve, GSRP students, this document provides instruction on reporting GSRP meals by Lunch Code. This report can then be submitted to the district for reimbursement
- **(30) Grandparent Meals**: this document is for districts that have Grandparent volunteers who get a free meal for volunteering. It covers how to set up the item in the Item Master, how to serve the meal, and how to report the meals served to submit to the district for reimbursement

General Food Service Report Related:

- **(67a) Data Mining Food Service Report Options:** covers the different reporting options for Food Service that can be found in Data Mining
- **(67b) Food Service Customer Views Options:** covers the different food service information that can be found within the different Food Service Customers views
- **(67c) Food Service Payor Views Options:** covers the different food service information that can be found within the different Food Service payors views

Food Service Director (typically):

- **(62a) Food Service Tasks and When to Perform Them**: provides an overview of Skyward Food Service tasks and when to perform them
- **(62b) Year End Tasks for FS Directors**: covers Skyward tasks you should complete prior to leaving for the year, as well as reports you should run
- **(62c) Year Start Tasks**: covers tasks that should be completed after returning for a new school year
- **(50a) FS Alerts/Batch Updates – FS Directors**: provides instructions for the FS Directors (or anyone else with access to this area) on how to manually update batch processes
- **(44b) Master Sales Activity Report**: provides instructions on how to run a master report of all cash drawers to see if they're under/over/balanced
- **(52) Viewing Student Contact Information in Skyward Food Service**: provides instruction on how to view parent/guardian/phone information for a student through Food Service
- **Accuclaim Report**: Skyward's report for obtaining monthly reimbursement counts. You can use the custom **RESA FS (34a) Monthly/(34b) Daily Summary** reports in place of this. They provide all the needed information on one report.

Item Master Related:

- **(53) Item Master**: provides information about the Item Master, how to set up various types of items, and how to add them to specific touch screens
- **(30) Grandparent meals:** this document is for districts that have Grandparent volunteers who get a free meal for volunteering. It covers how to set up the item in the Item Master, how to serve the meal, and how to report the meals served to submit to the district for reimbursement

Food Service ID/Barcode Related:

- **(60a) Generate Customer Key Pad Numbers:** used to randomly assign student short IDs
- **(60b) Food Service Short IDs**: provides instruction on the different ways of assigning student short IDs for use in the cafeteria line. There are different instructions for the FS director, cashiers and office staff
  - **(60c) Key Pad Numbers Report**: provides instruction on generating a report of student short IDs. These are typically used in the cafeteria line or provided to teachers to give to students
- **(51a) Student Barcode Labels**: provides instruction on how to print student barcode labels to be used in the cafeteria when students come down by teacher. Can be run by office staff, cashiers and FS director
- **(51b) Set Customer Barcode Numbers to Zero:** scenario: barcodes stop working in the cafeteria. Someone has run the Student Barcode Labels and selected an option to change barcode number. Run this utility to set them back to what they were

Cashier/POS Related:

- **(54) POS Configuration options**: provides information on the Configuration options found in each cashier's POS screen
- **(24c) Reporting Lunch Survey Results**: : provides instructions on how to print the lunch survey results recorded by classroom teachers
- **(56a) Reconciling Cash Drawers Between Meals**: provides instruction for cashiers in districts where they reconcile their cash drawers between breakfast and lunch
- **(56b) Reconciling Cash Drawers After Lunch Only**: provides instruction for cashiers in districts where they reconcile their cash drawers only after lunch
- **(56c) Recording Daily Cash Balances**: a spreadsheet-like means of reporting breakfast cash drawer information the lunch person will need to know when balancing the lunch drawer
- **(44a) Sales Activity Report**: used by cashiers to record cash drawer amounts to see if drawers are under/over/balanced
- **(55) Messages you Get in the POS System**: this document shows some of the common messages that pop up in the POS, as well as what they mean
- **(25b) Payor-Customer Meal Statements – Cashiers**: these are the detail reports for a specified student. They show the entire year's history of purchases and payments. Typically given to parents questioning an account. This option would be used by the cashiers or anyone else that doesn't have access to Food Service Customers
- **(38a) Fixing purchases from within the POS – Cashiers**: shows cashiers how to remove purchases recorded from within the POS

Office Related:

- **(60b) Food Service Short IDs**: provides instruction on the different ways of assigning student short IDs for use in the cafeteria line
- **(60c) Key Pad Numbers Report**: provides instruction on generating a report of student short IDs. These are typically used in the cafeteria line or provided to teachers to give to students
- **(51a) Student Barcode Labels**: provides instruction on how to print student barcode labels to be used in the cafeteria when students come down by teacher
- **(59b) Homeroom Information Office Staff Needs to Know**: for elementary buildings that use the Destiny library software, print barcode labels by teacher for Food Service, serve breakfast in the classroom or have GSRP programs. Provides information on what needs to be done if a new teacher starts, a teacher switches grade levels, or a new grade level/section is added

Miscellaneous:

- **(57) Customers vs. Payors**: provides an explanation of these two different areas in Food Service, along with what information is found in each
- **(50b) FS Alerts – 411**: provides some information on how Food Service purchases and transactions work, and how they pertain to the red FS Alerts link some people see at the top of their Skyward screen
- **(63) Frequently Asked Questions**: self-explanatory
- **(58) Screenshots from within Skyward**: provides instruction on how to take screenshots from within Skyward. You might use this feature when you have an error message you don't have time to look into, or when you want to print something out for future reference. Useful for any Skyward user

Access Related:

- **(45b) Creating Food Service Staff/Adult Customers**: provides instruction on how to create FS accounts for adults not found in Food Service. Typically done by the person in your district responsible for creating Staff accounts
- **(61a) Giving Staff Access to Their Own FS Account Information**: covers how to create permission sets, and add staff members to the set, in order for them to be able to view their own Food Service account information
- **(61b) How Staff Can View Their Own FS Account Information**: shows Staff members how to view their own Food Service account information, which is slightly different for teachers than it is for office staff
- **(34c) Installing Crystal Reports Viewer in Order to Run Custom Reports**: in order for the appropriate staff members to obtain a useful format of the custom **(34a) RESA FS Monthly Summary** report, Crystal Report Viewer needs to be installed on the person's computer. This document provides instruction on how to install it if the end-user doesn't have the appropriate permissions to do so
- **(64) Web-Based Workstation Requirements for Skyward**: if purchasing new computers on which Skyward will be accessed, this document covers the basic requirements for the computer so that Skyward can function most effectively
- **(24a) How to Create Surveys for Teachers to Record Meal Counts**: provides instruction on how to create Lunch Surveys for teachers to record student meal choices so the cafeteria knows how much food to make

Teacher Related:

- **(24b) Lunch Surveys for Teachers**: provides instructions for teachers, in districts where they record student lunch choices, on how to do so through Teacher Access
- **(37a) Purchase Entry by Homeroom – Elementary Teachers**: for districts where teachers record breakfast served in the classroom, this provides instruction on how to record purchases
- **(61b) How Staff Can View Their Own FS Account Information**: shows Staff members how to view their own Food Service account information, which is slightly different for teachers than it is for office staff

MSDS Related:

- **(08) Free/Reduced Eligible After Count Day**: provides instructions on getting a list of students that became free/reduced eligible after count day, but can still be reported as such for count day
- **(09) Uploading an Early Roster to get Applicable Direct Cert students**: provides instruction for the MSDS submitter in your district on how to upload an Early Roster file, which is used to obtain DC status for new students – primarily kindergarten

(03) Application Guide

This document is for the person in your district that process the Free/Reduced meal applications. It's a guide on what to do every year in order to prepare for processing new Food Service applications, as well as the application process itself. There is corresponding documentation for step-by-step instruction on how to complete each of these steps. Use this as a check off list for completed tasks

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☐ Call SIS TEAM 455-1004 with what your 30th school day is for the new school year

☐ Notify your MSDS submitter that an Early Roster file needs to be uploaded to CEPI in order for the Direct Cert file to be refreshed.
- **Explanation**: the State of Michigan releases the Direct Cert list based on students attending your district. If you have new students attending your district (including incoming KD kids), the State won't know they're attending your district until you tell them so. If you wait until Count Day to submit this information, these new students won't appear in any Direct Cert files until after Count Day. In order to let the State know prior to Count Day, an Early Roster file should be submitted through CEPI. CEPI sends emails out notifying districts of Early Roster and DC file deadlines. These should be done as early as possible so that households don't fill out unnecessary application paperwork

☐ **(04d) Update the following Application Letter Templates**:
- Denied – Income Over Limit
- Direct Certification Letter
- Expiring Letters
- Free Letter
- Reduced Letter

☐ **(04c) Update the following Application Letters**:
Note: refer to **(04b) USDA Non-Discrimination Statement and Application Letters** before updating the letters
- Denied Letters
- Direct Certification Letter
- Free Approved Letters
- Prior Year – About to Expire
- Reduced Approved Letter

(03a – 03i) Process incoming applications
Note: Refer to document **(03a)** for an overview or **(03b-03i)** for detailed instructions on how to process different types of applications
Note: applications can be backdated up to 10 days from the day they were received. However, they cannot be backdated earlier than the signature date on the application
Note: don't process any applications if they are not complete. Contact applicant for any missing/confusing information
Note: prior to processing an application, make sure that the students on the application are not already Direct Cert for the current school year

(03i) Print Application letters notifying households of eligibility

☐ Run the **(20) Sync Payor Status Audit** utility to inactivate any exited students that might appear incorrectly on one of the following reports

☐ Run **(21) RESA FS Application Lunch Code Errors** after processing a bunch of applications to see if there are any issues

☐ Run **(22) RESA FS Customer Control vs. Application** report after processing a bunch of applications to see if there are any issues

☐ Prior to the 30 day carryover eligibility expiring (usually mid-October), print reports and/or letters notifying households of **(04a) Expiring Applications**

(03a) What Information is needed for Which Type of Application

This document is for district staff that process Skyward's Food Service applications. It's just a refresher on what type of information to include, based on the type of application you're processing. **It's important that this format be followed**, as it makes it easier when trying to troubleshoot Skyward FS issues. Information also needs to be entered exactly like this for Verification purposes. See individual documentation for step-by-step instructions on processing the different types of applications. After you process a bunch of applications, it's a good idea to run the **(21) RESA FS Application Errors report** to see if there are any issues

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(03b): D (Direct Cert): used by the system when a Direct Cert file is loaded. Also used when extending household eligibility to someone in the house who was not on the DC list
No: Any income
No: Case Number
No: Application Number
No: Household Size
Lunch Code = D
Exclude Selection Reason: most often this will be **SNAP**. However, you should look at the student who was in the DC file in order to determine what they were. Could also be **TANF**. If original student was Foster, the eligibility should not be extended
   • **Note**: do NOT use **Direct Certification** or **SNAP Letter** as exclude reasons
Application Comments: when extending eligibility, put a note here with the student's name that did have the DC eligibility. **Example**: Extending eligibility due to household student Peter Pan
Can be cloned to other household members? The eligibility does extend from within a household, but you should not clone DC applications from one student to another. Manually create each individual's DC application

(03f): F (Income Eligible Free): used when the application contains income and household size information
Yes: Income. If household has no income, put $1 for income
No: Case Number
Yes: Application Number
Yes: Household Size
Lunch Code = F
Applicant Has No SSN checkbox: yes
   • **Note**: this information needs to be on the paper application, but does not need to be entered into Skyward
Application Comments: when there is no income on application, and you put $1 in the income section, enter a comment here that says "Zero income"
Can be cloned to other household members? Yes

(03d): G (Food Stamp): used when the application contains a valid Food Stamp Case Number
Yes: Food Stamp Case Number
Yes: Application number
No: any income
No: Household size

Lunch Code = G
Can be cloned to other household members? Yes

(03c): **H (Homeless): used when a McKinney Vento form is given to you**
No: any income
No: Application number
No: Case Number
No: Household size
Lunch Code = **H**
Exclude Selection Reason: Homeless child
Can be cloned to other household members? No

(03e): **O (Foster): used when the application is listed as a Foster application**
Yes: Foster Application
No: any income
Yes: Application Number
No: Case Number
No: Household Size
Lunch Code = **O**
Can be cloned to other household members? No

(03f): **R (Reduced)**: Used when an application contains income and household size information that results in a Reduced status
Yes: Income
No: Case Number
Yes: Application Number
Yes: Household Size
Applicant Has No SSN checkbox: yes
- **Note**: this information needs to be on the paper application, but does not need to be entered into Skyward
Lunch Code = **R**
Can be cloned to other household members? Yes

(03b) Adding Direct Cert to a student's Food Service account in Skyward

This document is for the person that processes Free/Reduced Meal Applications and would be used when it has been determined that at least one student in a household is Direct Cert, but not all kids in the household were on the list and you want to extend the benefits to the others in the household

Note: if you already know how to process applications, but just don't remember what type of information to include/not include for the various lunch codes, you can refer to **(03a) What Information is Needed for Which Type of Application**

Note: if a student in a particular household is on the Direct Cert list, and the benefit is either SNAP or TANF, these benefits **can** be extended to all other students in the household. If a DC student is Foster or Homeless, these benefits do **NOT** get extended. So, before you extend benefits, you must first see what the original student's benefit is.

Note: when you create an application for a student, you can then clone that application to other students in the household. **However**, you should not do this for DC students, as doing so produces various issues

1. Click on the **Food Service** tab in Skyward
2. Under the **Payor/Customer Maintenance** section, click on **Payors**
3. Click the dropdown arrow to the left of the student's name **that was on the DC list**:

4. Click the dropdown arrow to the left of **Applications**:

5. For the **DC** application, click on the **Edit** button
6. At the bottom of the application, look to see what the **Program Type** is. If it's **SNAP** or **TANF**, continue on. If it's Foster or Homeless, do not extend the benefits

7. Now search for the student you want to extend the benefit to
8. Click the dropdown arrow to the left of Applications

9. Look at the top (most recent) application and see what the Effective Date and Lunch Codes are:
   - Is the **Effective** Date 07/01 of this year or later? If yes, this is a current application. Look at the Lunch Code. If it's anything other than D, enter the Direct Cert status
   - If the **Effective** Date is prior to 07/01 of this year, enter the Direct Cert status
10. If processing the application, click on **Add Application**
11. Look at the **Effective Date** and change it if necessary
12. If backdating the **Effective Date**, also backdate the **Application Date** to the same date

Note: The **Application Date** is the date you're actually entering the information. The **Effective Date** is the date the student becomes eligible for Free/Reduced meals. They both default to the system date. If you're backdating the Effective Date, it helps if you also backdate the Application Date to the same date. If you forget, don't worry about it

Note: if you are backdating the Effective Date, any purchases made during those days will be updated to reflect the new status

13. Set the **Lunch Code** to **D – DC**
14. Set the **Exclude Select Reason** to whatever the student had in step 6 above **(SNAP or TANF only!)**
15. In the **Application Comments** section, enter the name of the student that was in the DC list

16. Click on **Save**
17. You will get a message that **No Application Number** has been entered. Click **YES** to this
    - **Note**: application numbers will not be assigned when manually entering DC or Homeless records. They will only be assigned when processing an actual paper application

18. Repeat for any remaining students in the household

(03c) Adding Homeless Status to a Student's Food Service Account in Skyward

This document is for the person that processes Free/Reduced Meal Applications and would be used when it has been determined (McKinney Vento form) that a student qualifies for Homeless status

Note: if you already know how to process applications, but just don't remember what type of information to include/not include for the various lunch codes, you can refer to **(03a) What Information is Needed for Which Type of Application**

1. Click on the **Food Service** tab in Skyward
2. Under the **Payor/Customer Maintenance** section, click on **Payors**
3. Click the dropdown arrow to the left of the student's name:

4. Click the dropdown arrow to the left of **Application**s:

5. Look at the top (most recent) application and see what the Effective Date and Lunch Codes are:
   - Is the **Effective Date** 07/01 of this year or later? If yes, this is a current application. Look at the Lunch Code. If it's P or R, process the application. If the student is already free, regardless of the reason, the Homeless app does not need to be processed
   - If the **Effective Date** is prior to 07/01 of this year, process the application
6. If processing the Application click on **Add Application**
7. Look at the **Effective Date** and change it if necessary
8. If backdating the **Effective Date**, also backdate the **Application Date** to the same date

Note: The **Application Date** is the date you're actually entering the information. The **Effective Date** is the date the student becomes eligible for Free/Reduced meals. They both default to the system date. If you're backdating the Effective Date, it helps if you also backdate the Application Date to the same date. If you forget, don't worry about it

Note: if you are backdating the Effective Date, any purchases made during those days will be updated to reflect the new status

9. Set the **Lunch Code** to **H**
10. Set **Exclude Selection Reason** to **Homeless Child**

11. Click on **Save**
12. You will get a message that **No Application Number** has been entered. Click **YES** to this
    - **Note**: application numbers will not be assigned when manually entering DC or Homeless records. They will only be assigned when processing an actual paper application

13. Repeat for any remaining students

(03d) Entering a Food Stamp Application into Skyward

This document is for the person that processes Free/Reduced meal applications and provides step-by-step details on how to create a Food Stamp application

Note: it is assumed that you've already looked over the paper application and verified all required information is present. Do not process the application if information is missing. Contact the applicant for clarification if needed

Note: if the application contains both income information and a valid Food Stamp case number, process the application as Food Stamp

Note: if you already know how to process applications, but just don't remember what type of information to include/not include for the various lunch codes, you can refer to **(03a) What Information is Needed for Which Type of Application**

1. Click on the **Food Service** tab in Skyward
2. Under the **Payor/Customer Maintenance** section, click on **Payors**
3. Click the dropdown arrow to the left of the student's name:

4. Click the dropdown arrow to the left of Application:

5. Look at the top (most recent) application and see what the **Effective Date** and **Lunch Codes** are:
    * Is the **Effective Date** 07/01 of this year or later? If yes, this is a current application. Look at the Lunch Code. If it's an R or a P, process the application ***** see step 6
    * If the **Effective Date** is prior to 07/01 of this year, process the application * see step 6
6. Preview this same information for any other students on the application
    * If any student on the application is DC for the current school year (has a date of 07/01 of this year or later), do not process the application. Instead, follow the document for **Adding Direct Cert to a Student's Account in Skyward**
    * If no student on the application is DC, process the app
7. Click on the **Add Application** link
8. Look at the **Effective Date** and change it if necessary
9. If backdating the **Effective Date**, also backdate the **Application Date** to the same date

Note: The **Application Date** is the date you're actually entering the information. The **Effective Date** is the date the student becomes eligible for Free/Reduced meals. They both default to the system date. If you're backdating the Effective Date, it helps if you also backdate the Application Date to the same date. If you forget, don't worry about it

Note: if you are backdating the Effective Date, any purchases made during those days will be updated to reflect the new status

10. Check the box to indicate **Applicant Has No SSN**

Note: certain application types require that the last four digits of the applicant's SSN be entered. However, Skyward does not need to have this number entered, so this box can be checked for all application types

11. Enter the Food Stamp **Case Number**
    - If you tab off of the Case Number field, you may get a message that this student qualifies for Free priced meals and asks you if you want to change the code to Free. Click on **No**
12. Enter the **Application Number**
    - **Note:** only paper apps that you process will get an Application Number. You will need to keep track of which numbers have been used

13. Enter a **Lunch Code** of **G** - **Food Stamp**

14. Are there other students on the application? If so, otherwise, skip to step 14:
    - Click on **Clone Application**
    - Check the box for any other students that should be added to the application
    - Click on **Save**
15. Click on **Save**

(03e) Entering a Foster Child Application in Skyward

This document is for the person that processes Free/Reduced meal applications and provides step-by-step details on how to create a Foster application

Note: if you already know how to process applications, but just don't remember what type of information to include/not include for the various lunch codes, you can refer to **(03a) What Information is Needed for Which Type of Application**

1. Click on the **Food Service** tab in Skyward
2. Under the **Payor/Customer Maintenance** section, click on **Payors**
3. Click the dropdown arrow to the left of the student's name:

4. Click the dropdown arrow to the left of Application:

5. Look at the top (most recent) application and see what the date **Effective Date** and **Lunch Codes** are:
   - Is the **Effective Date** 07/01 of this year or later? If yes, this is a current application. Look at the Lunch Code. If it's P or R, process the application
   - If the **Effective Date** is prior to 07/01 of this year, process the application
6. If processing the application, click **on Add Application**
7. From the **Foster Application** dropdown menu, select **Yes**
8. If prompted to change the **Lunch Code to Free**, select **No**
9. Look at the **Effective Date** and change it if necessary
10. If backdating the Effective Date, also backdate the Application Date to the same date

Note: The **Application Date** is the date you're actually entering the information. The **Effective Date** is the date the student becomes eligible for Free/Reduced meals. They both default to the system date. If you're backdating the Effective Date, it helps if you also backdate the Application Date to the same date. If you forget, don't worry about it

Note: if you are backdating the Effective Date, any purchases made during those days will be updated to reflect the new status

11. Enter the **Application Number**
12. Set the **Lunch Code** to **O**
13. Click on **Save**

(03f) Entering an Income Eligible application into Skyward

This document is for the person that processes Free/Reduced meal applications and provides step-by-step details on how to create an Income Eligible application

Note: if the application contains both income information and a valid Food Stamp case number, process the application as Food Stamp

Note: it is assumed that you've already looked over the paper application and verified all required information is present. Do not process the application if information is missing. Contact the applicant for clarification if needed

Note: if you already know how to process applications, but just don't remember what type of information to include/not include for the various lunch codes, you can refer to **(03a) What Information is Needed for Which Type of Application**

1. Click on the **Food Service** tab in Skyward
2. Under the **Payor/Customer Maintenance** section, click on **Payors**
3. Click the dropdown arrow to the left of the student's name:

▼ Perritt

4. Click the dropdown arrow to the left of Application:

		Temp?	Appl Date	Effective Date	Active?	Denied?	HH Size	Lunch Code	Application Number	Application Type
▼ Applications	Add Application									
▶ View		No	07/11/2013	01/01/1900	Yes	No	0	P - Paid		Manual

5. Look at the top (most recent) application and see what the date **Effective Date** and **Lunch Codes** are:
    *   Is the **Effective Date** 07/01 of this year or later? If yes, this is a current application. Look at the Lunch Code. If it's an R or a P, process the application *see step 6
    *   If the **Effective Date** is prior to 07/01 of this year, process the application *see step 6
6. Preview this same information for any other students on the application
    *   If any student on the application is DC for the current school year (has a date of 07/01 of this year or later), do not process the application. Instead, follow the document for **Adding Direct Cert to a Student's Account in Skyward**
    *   If no student on the application is DC, process the app
7. Click on the **Add Application** link
8. In the **Calculate Annual Income** section, enter the income and frequency listed on the paper application

9. Look at the **Effective Date** and change it if necessary
10. If backdating the **Effective Date**, also backdate the **Application Date** to the same date

Note: The **Application Date** is the date you're actually entering the information. The **Effective Date** is the date the student becomes eligible for Free/Reduced meals. They both default to the system date. If you're backdating the Effective Date, it helps if you also backdate the Application Date to the same date. If you forget, don't worry about it

11. Check the box to indicate **Applicant Has No SSN**

Note: certain application types require that the last four digits of the applicant's SSN be entered. However, Skyward does not need to have this number entered, so this box can be checked for all application types

12. Enter an **Application Number** and **Household Size**

Note: you will, at this time, need to keep a record of which application numbers you have used, as you will need to enter the next available number every time you process an application.

You will now receive a message that the system has calculated the eligibility and asking if you want it to set the pay type. Review the eligibility (in this example, Reduced) and make sure it seems right for the information you entered (in case of a type-o). If this seems appropriate, click on **Yes**
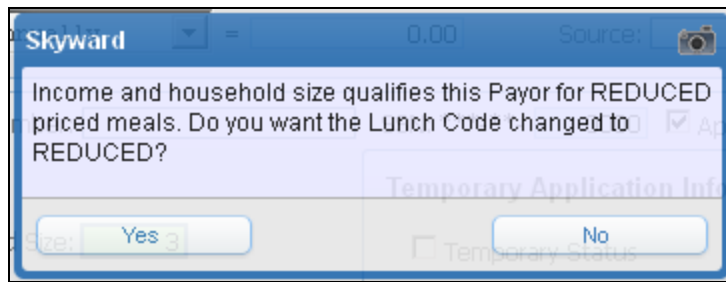
Note: by saying Yes here, all it does is populate the Lunch Code with the referenced status:

Note: If the student(s) qualify for Free, the Lunch Code should show F

13. Are there other students on the application? If so continue, otherwise, skip to step 15:
    - Click on **Clone Application**
    - Check the box for any other students that should be added to the application
    - Click on **Save**
14. Click on **Save**
15. Repeat for any remaining applications

(03g) Creating an Application for Multiple Household Students

This document is for the person that processes Free/Reduced Meal Applications. It offers an alternate option for creating applications.

Explanation: when processing applications, you can either go into Food Service/Payors, create an application for one student on the application, then Clone that application to other household members, or you can create 1 application for an entire family. The option in this document shows you how you can to go into the Family/Applicant, and select all students at once. As a result, no cloning is necessary. It's also a quick and easy way to determine if one/all students in the household are DC, without having to look all of them up

Note: the downside to this is that you have to be able to find the applicant when processing an application this way. And the applicant has to be listed as a guardian in Family 1 for the students to appear under this applicant. It can sometimes by difficult finding the applicant – especially if they have a different last name than the students

Note: you would only use this process for Income Eligible and Food Stamp applications

Note: if you already know how to process applications, but just don't remember what type of information to include/not include for the various lunch codes, you can refer to **(03a) What Information is Needed for Which Type of Application**

1. Click on the **Food Service** tab
2. In the **Payor/Customer Maintenance** section, click on **Family/Household**
3. Search for the applicant
4. Click the dropdown menu to the left of the applicant's name
5. Click the dropdown menu to the left of Payors in this Family

6. This section will show you all students associated with this person, along with their current Lunch Code. In this example, some of the students in this household are DC, but not all. Therefore, you don't need to process the application; just go into Barbara's account and create a DC application for her

Payor Name	##	Status	Prior Balance	YTD Pmts	YTD Purchs	Curr Bal	Lun Code	Eff Date
▶ Edit Kimball, Barbara	1	Active	-13.25	0.00	0.00	-13.25	P - Paid	08/15/2013
▶ Edit Levandowski, Kathy	1	Active	0.00	0.00	0.00	0.00	D - DC	10/01/2014
▶ Edit Ramsey, Virginia	1	Active	0.00	0.00	0.00	0.00	D - DC	10/01/2014
▶ Edit Thibodeau, Kathy	1	Active	0.00	1.00	1.00	0.00	D - DC	10/01/2014
▶ Edit Hanvey, Robert	2	Active	0.00	0.00	0.00	0.00	D - DC	08/13/2014
▶ Edit John, Hartzell	2	Active	0.00	0.00	0.00	0.00	D - DC	08/13/2014

▼ Payors in this Family

7. In the example below, no students are DC. Therefore, the whole family needs an application. Click on the link in the **Applications in this Family** section to **Add Family Application**

▼ Payors in this Family

Payor Name	##	Status	Prior Balance	YTD Pmts	YTD Purchs	Curr Bal	Lun Code
▶ Edit Kimball, Barbara	1	Active	-13.25	0.00	0.00	-13.25	P - Paid
▶ Edit Levandowski, Kathy	1	Active	0.00	0.00	0.00	0.00	P - Paid
▶ Edit Ramsey, Virginia	1	Active	0.00	0.00	0.00	0.00	P - Paid
▶ Edit Thibodeau, Kathy	1	Active	0.00	1.00	1.00	0.00	P - Paid
▶ Edit Hanvey, Robert	2	Active	0.00	0.00	0.00	0.00	P - Paid
▶ Edit John, Hartzell	2	Active	0.00	0.00	0.00	0.00	P - Paid

Total Records: 6

▼ Applications in this Family Add Family Application

	Temp?	Appl Date	Effective Date	Active?	Denied?	Payor Name	HH Size	Lun Co
▶ Edit	No	10/01/2014	10/01/2014	Yes	No	Levandowski, Kathy	0	P - Paid
▶ Edit	No	10/01/2014	10/01/2014	Yes	No	Ramsey, Virginia	0	P - Paid

8. You may get a message like this. If so, click on **OK**

Application Notice

The following names do not have the same household address as the selected Guardian and were not selected by default:
Hanvey, Robert
John, Hartzell

OK

9. When the Application screen comes up, based on the message above, it automatically checks the box for all students except Robert and John. If they are included on the paper application, check their names here as well

Create Application For					
Create? ▲	Primary Payor Name	##	S	Appl LC	Appl Date
▶ ☑	Kimball, Barbara	1	A	P	08/15/2013
▶ ☑	Levandowski, Kathy	1	A	P	10/01/2014
▶ ☑	Ramsey, Virginia	1	A	P	10/01/2014
▶ ☑	Thibodeau, Kathy	1	A	P	10/01/2014
▶ ☐	Hanvey, Robert	2	A	P	08/13/2014
▶ ☐	John, Hartzell	2	A	P	08/13/2014

10. Complete the application as you would when processing a single student
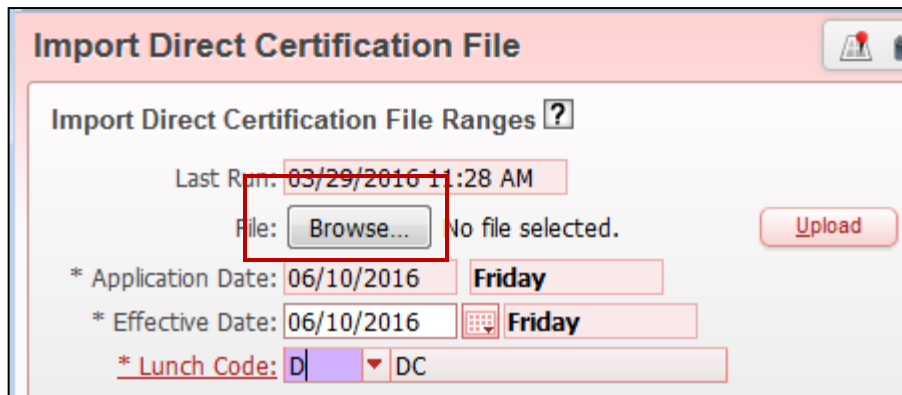11. Click on **Save**

(03h) How to load Direct Cert files into Skyward

This documentation is for the Skyward user responsible for sending out the Direct Cert letters once the file has been uploaded.

1. Obtain the Direct Cert file from the person in your district that gets it from CEPI
2. Open the file. Look down the 'Matched Date' column to see what the most recent match date is.
   - **Note**: the file may not come out until the 6th, but is effective on the 1st. When you upload the file, you'll need to know this date
   - **Important Note**: if the Match Date shows any month other than the one you're in, you should not backdate the file any earlier than the 1st day of the current month. Example: today is 6/12 but the Match Date in the file is 5/15. When I load the file into Skyward, I should not use a date earlier than 6/1
   - **IMPORTANT**: after you get the date, click on **File/Save As**. The file is going to want to save as a **.txt** file, which won't work. From the dropdown menu, select **.csv** to save it
3. In Skyward, click on the **Food Service** tab
4. In the lower right-hand corner, under the **Direct Certification** section, click on **Direct Certification Processes**
5. Click on **Import Direct Certification Files**
6. Click on the **Import File** button
7. If a file is already loaded, you'll see the following:

8. Click on **Remove Attached File**
9. Click on the **Browse** button and Browse to your file location

10. The **Application Date** is the date you're loading the file. This does not affect anything and cannot be changed
11. Change the **Effective Date** to the date you found in the spreadsheet. This is important, as the system will update any meals served to Paid or Reduced students as of this date

12. For the **Lunch Code**, enter **D**
13. Click on the **Upload** button
14. Click on the **Run** button
15. Click **Yes** to the "are you sure" prompt
16. Once the process has completed, you will see the following:
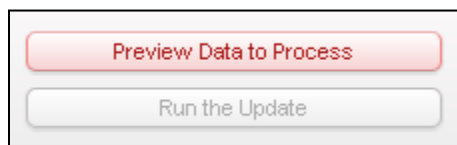
17. Click on **Preview Data to Process**
18. There isn't anything you need to look at on this screen. Just click the **Back** button
19. Click on the **Run the Update** button
20. Click on **OK** to the prompt
21. Once the processing has completed, click on **Display Report**
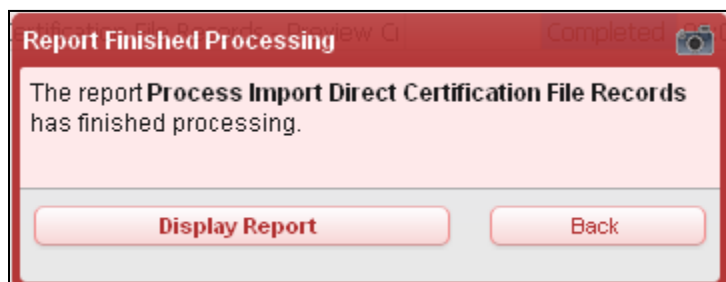
On this report, there are a few things you want to look at. The first page(s) shows the kids who were made DC, along with their previous lunch codes:

If the 30 day carryover process has already run, you might see kids on here that already have an application for the current year. In this example, the first student was already free, and already knows they're free. Therefore, it's not necessary to send them another letter. However, the last 4 students went from either Reduced or Paid to DC. These kids do need to get the letter.

You have one of two choices here. You can print all the letters out and just remove those who don't need to get it. Or, you can go into the student's application and mark the option for **Letter Sent** to **Yes**. This is how you do that:

22. On the **Food Service** tab, select **Payors**
23. Bring up one of the students that was already free
24. Click the dropdown arrow next to their name
25. Under the Application section, you'll see the previous entry, which was already Free, and the new entry, which is DC

	Temp?	Appl Date	Effective Date	Active?	Denied?	HH Size	Lunch Code
▶ Edit	No	05/06/2014	05/01/2014	Yes	No	5	D - DC
▶ Edit	No	03/19/2014	03/18/2014	Yes	No	5	F - Free

26. Click on the **Edit** button
27. In the lower left-hand area, change **Letter Sent** to **Yes**.

Letter Sent?: Yes

28. Click on **Save**

Now, when you go to (03i) print the letters, this one will not print, as they system thinks it has already been printed.

You also want to look at the last page(s) of the DC report, which shows where there are multiple students in a household, but not all of them are DC. The bolded name shows the student who was in the file. The name beneath it shows who else is in that same household, but was not in the file. If any of the students show that they're R or P, these kids may be eligible to be made DC. It's always a good idea to call the household to verify both students do, in fact, live there.

Important Note: when you load the DC file and backdate it, it will overwrite any applications that you entered with a later effective date. For example: you process an application with an effective date of 9/8, which resulted in a Reduced status. You then load the DC file with an effective date of 9/2. This will overwrite your Reduced application and make it DC, but will not overwrite the Customer Control Record, which is what determines what the student is charged in the cafeteria line. You do want to backdate the DC file, as that's when the student was eligible, but you'll want to run the **(22) RESA FS Customer Control Record vs. Application report** afterwards to see if there were any of these issues. If so, call the RESA SIS help desk for help until you're comfortable with making the CCR changes yourself.

Note: a ticket was submitted to Skyward on this on 10/1/15

Refer to **document 03i** for instructions on printing FS Letters

(03i) Printing Application Letters

This document is for the person in your district that processes Free/Reduced meal applications, and includes steps on how to print application letters notifying households of eligibility

After you've processed Food Service applications, or after a Direct Cert file has been loaded, you'll need to print letters notifying households of their eligibility:

1. From the **000** entity, click on the **Food Service** tab
2. From the **Application Letters** section, click on **Print Application Letters**
3. Based on the types of applications you've processed, highlight the type of letter you want to print
4. Click on **Print**
5. Once the report has finished processing, click on **View**
6. If printing this particular letter for the first time this year, and if you had to make any changes to the letter, read it over and make sure everything looks right. If not, reference **(04c) How to Update Application Letters**
7. **Print** the letters

Note: if you're removed the USDA statement from your letter, don't forget to either attach a copy of it to each letter, or run the letters back through the printer and print the notices on the back

(03j) Printing Application Letters/Copies for an individual student

This document is for the person providing audit documentation for the AR Review, or for anyone that needs to print out additional copies of individual application letters. It shows how to print additional copies of notices that have already been printed out

1. From the **000** entity, click on the **Food Service** tab
2. From the **Payor/Customer Maintenance** section, click on **Payors**
3. Search for the appropriate student and expand his/her record
4. Under the Applications section, look for a current year application (7/1/xx or later, where xx is this year) that has the appropriate lunch code you need to print a letter for. In this example, it's a Paid application

Application Date (1)	Effective Date (1)	Active? (1)	Denied? (1)	HH Size (1)	Lunc Cod
09/18/2015	09/17/2015	Y	N	0	H
08/12/2015	07/24/2015	Y	N	0	D
10/13/2014	10/14/2014	Y	N	0	P
08/03/2015	08/03/2015	Y	Y	3	P
08/12/2015	07/24/2015	Y	N	0	D

5. Take note of the Lunch Code
6. In the upper right-hand corner of the screen, click on **Quick Print**
7. For the **Report Option**, select **Application Letters**
8. From the **Template** dropdown menu, select the appropriate letter for the student's lunch code (that you took note of in step 5)

9. Click on **Run**

(03k) Emailing Application Letters

This document provides instruction on emailing application approval/denied letters

Note: letters will be emailed where the guardian has an email listed in the system. For those that don't have an email, the email process will produce a letter that can be printed

In order to email application notices a change needs to be made in your existing application letters. With this option selected, any 1st guardian in the system with an email address will get an email notification of the application letter. For those that don't have an email listed for the 1st guardian, the actual letter will be printed during the Print Application Letters process

1. From the **000**, click on the **Food Service** tab
2. Under **Application Letters**, click on **Print Application Letters**
3. Highlight one of your existing templates and click on **Edit** (to the right)
4. **Expand** the **Email Options** section
5. **Check** the box to **Send Application Letters via Email**
6. **Email Body**: this is the text the guardian will see when they open the email. You should enter something here that's descriptive of the letter they're receiving. For example, in the Free letter, the Email Body should be something along the lines of: Your 16-17 Free/Reduced Meals Application has been processed and you have been approved for Free meals.
7. Click on **Save** or **Save and Print** if you're ready to process letters

If you Save and Print, an email will be immediately sent, wherever applicable. For those that don't have an email address listed, you'll view the generated report and print out the letters shown

Note: the generated report will also provide a list of applicants that received the emailed notice. It's not a bad idea to save a copy of this for possible future reference

(04a) Expiring Applications

This document is for the person responsible for sending expiring free/reduced status letters to any parents that have not yet reapplied for benefits for the current school year. It includes instructions on how to print a report of students that don't have a current year application, as well as how to print the actual letters that will be sent to the parent/guardian

Explanation: if a student doesn't have a new application submitted within 30 school days of the new school year, s/he will be given a Paid status on the 31st day. In order to see who these students are, you can run a report to see who has not yet reapplied and/or you can print letters to send home

To run a report:
1. From the **000** entity, click on the **Food Service** tab
2. Under the **Food Service** module, click on **Reports**
3. From the **Reports** menu, at the very bottom, click on **Prior Year Applications Report**
4. Click on **Add** to add a new template
5. Give it a description of **xx 2016 Expiring Apps** (where xx is your initials – create it for the appropriate year)
6. Check the box to **Share with other users in entity 000**
7. For the **Application Low** date, enter **07/01/xx** (where xx is **last** calendar year)
8. For the **Application High** date, enter **06/30/xx** (where xx is **this** calendar year)
   - **Example**: it's October 1st, 2015, and I need to send out letters for those who applied last year. My Low Date would be 07/01/14 and my High Date would be 06/30/15
9. For the **Processing Date**, use **today's** date
10. Set the **Payor Status** to **Active**
11. **Uncheck** the **All Lunch Codes** box
12. Click on the **Lunch Codes button**
13. Check everything **except** Paid, Visitor and Staff
14. Click on **Save and Print**

To print letters:
1. From the **000** entity, click on the **Food Service** tab
2. Under the **Application Letters** module, click on **Print Application Letters**
3. **Highlight** the template called **'XX: Prior year – about to expire'** (or something of that nature, where XX is your initials) and click on **Edit**
   - If you don't have an **Edit** button, check to see if **Created By** has your name. If not, you'll need to clone the existing app and give it another name
   - If you don't already see this letter here, click on **Add** to create a new one. Give it the name referenced above
4. In the **Letter Selection** section, select the following:
   - **Letter Type**: Prior Year Application
   - **Letter By**: Guardian
   - **Selected Merge Letters**: Expiring Letter
   - **Default Merge Letter**: Expiring Letters
5. In the **Application Ranges** section, enter the following:
   - **Application Date**:

- **Low** = 07/01/xx (where xx is **last** year)
- **High** = 06/30/xx (where xx is **this** year)

Example: it's October 1st, 2015, and I need to send out letters for those who applied last year. My Low Date would be 07/01/14 and my High Date would be 06/30/15

- **Processing Date**: enter today's date
- **Payor Status**: set to Both
- **Student Status**: set to Active
- Uncheck **Select All Lunch Codes**
- Click on the **Lunch Codes** button
- Check everything **except** Paid, Visitor and Staff

6. Go back up to the **Letter Selection** section and click on the blue link for **Custom Food Service Letter**
7. From the list of letters, **highlight** the **Expiring** letter
8. On the right-hand side of the screen, click on the **Edit** button
9. Make any necessary changes to the letter (like contact names if they've changed and any referenced dates)
10. In the upper-right of the screen, click on **Save & Close**
11. Click on **Back**
12. Click on **Save and Print**

Note: you can print these letters as often as you'd like

Note: if you have the Email Option selected in this template, it will email the notification to the 1st Guardian listed in the student's 1st Family, if that person has an email listed. If not, a letter will be printed for that person. The report itself will provide a list of those emailed, as well as the actual letter for those that need it

(04b) USDA Non-Discrimination Statement and Food Service Letters

This document is for the person that processes applications and covers some information on the verbiage in the Food Service application letters

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Every year or so, the USDA changes the verbiage in their Non-Discrimination Statement. Prior to printing out application letters for the New Year, you'll want to check to see if this verbiage has changed. For the 15-16 school year, it was so long that it didn't fit on the application letters if there was more than 1 student listed on the letter. Trying to make it fit on 1 page required that the font be so small it was unreadable. We had run into issues in prior years with the letter spanning to a 2nd page, where one person's letter might start at the bottom of someone else's second page. Therefore, some districts chose to remove the statement entirely from the letter. They either printed a bunch of the statements out on a separate page and attached them to the letters, or they re-ran the letters through the printer and printed the statement on the back of the letter. If you need to make any changes to the USDA statement, and it is in your actual letter, use **document 04c** for instructions on updating the text. If you don't have the text included in your letter, make sure to check for the latest statement and print them out if needed

You'll also want to see if the verbiage in the actual letters you send has changed. This doesn't happen very often, but if it does, you might need to update the letters as well (**document 04c**)

(04c) How to Update Application Letters

This document is for the person that sends out the Food Service Free/Reduced/Verification letters/notices. It covers how to update the text for the letters that get sent home notifying households of their eligibility

Food Service Letters typically need to be updated from one year to the next. The letter, which contains the actual verbiage on whether or not they were approved for free/reduced meals, usually contains year specific dates, prices….

To update the Food Service Letters:
1. From the **000** entity, click on the **Food Service** tab
2. Under the **Payor/Customer Maintenance** module, in the **Application Letters** section, click on **Maintain Letter Templates**
3. Highlight the first letter and click on **Edit Form**
4. Read through the letter to see if there are any year-specific dates, prices or if anyone's name needs to be changed in the letter. Make any necessary changes
5. In the upper right-hand corner, click on **Save & Close**
6. **Repeat** for any remaining letters

These are the application letters that need to be looked at:
- Denied – Income Over Limit
- Direct Certification Letter
- Free Letter
- Reduced Letter

Note: Expiring Letters are addressed in document **04a**
Note: All Verification related letters are addressed in documents **07a** and **07b**

(04d) How to Update Application Letter Templates

This document is for the person that sends out the Food Service Free/Reduced/Verification letters/notices. It covers how to update the templates that tell the system who to print the eligibility letters for

Food Service Report Templates typically need to be updated from one year to the next. The Report Templates tell the system who to print the letters for and do contain dates that need to be changed

To update the Application Report Templates:
1. From the **000** entity, click on the **Food Service** tab
2. Under the **Payor/Customer Maintenance** module, in the **Application Letters** section, click on **Print Application Letters**
3. Highlight the first template and click on **Edit**
   - If the template was **Created By** someone other than you, you won't be able to edit it. You'll have to click on **Clone** and create a new one. If you create your own, give it the same name, but include your initials at the beginning of it. **Example**: BK: Denied Letters
4. Make any necessary changes referenced starting on the next page
5. Once changes have been made, click on **Save**

The following templates need to be updated:
- Denied Letters
- Direct Certification Letter
- Free Approved Letter
- Reduced Approved Letter

Note: Verification-related templates are covered in **documents 07a** and **07b**
Note: Expiring letters are covered in **document 04a**

Denied Letters:

Letter Selection

Letter Type: ⦿ Payor Application
○ Prior Year Application
○ Temporary Application
Letter By: ⦿ Guardian ○ Payor
* Custom Food Service Letter: Denied - Income Over Limit ▾

Application Ranges

	Low	High
Guardian Alphakey:		ZZZZZZZZZZZ
Application Number:		ZZZZZZZZZZZZ
Case Number:		ZZZZZZZZZZZZZZZZZZ
Annual Income:	0.00	
Application Date:	07/01/2015	
Effective Date:	07/01/2015	

Where both Application Date and Effective Date are 07/01/ of the current year

Payor Status: Both ▾
Student Status: Active ▾
Application Status: Active ▾
Letter Sent: No ▾
Application Denied: Yes ▾
Application Type: All ▾

☑ Select All Default Entities [Entities]

☐ Select All Lunch Codes [Lunch Codes]

Where only the P Lunch Code is selected

☑ Only Print Most Recent Application for Payor
☐ Include ALL students for Payor if one falls within the Default Entity Range

Letter Setup

Heading Line 1:
Heading Line 2:
Heading Line 3:
Contact Name:
Address:
City/State/Zip:
Phone:
Email:
Signature Name:
Title:
Respond By: 10/01/2015
Follow-up Response: 10/01/2015
Letter Options: ☐ Print Payor Titles
☑ Set Letter Sent Field
☐ Breakfast Served

These dates don't really affect anything, but a date is required in order to save the template Make sure the Set Letter Sent box is checked

Reduced Cost Descriptions
Lunch Description:
Breakfast Description:

Direct Certification Letter:

Letter Selection

Letter Type: ● Payor Application
○ Prior Year Application
○ Temporary Application
Letter By: ● Guardian ○ Payor
* Custom Food Service Letter: [Direct Certification Letter ▼]

Application Ranges

	Low	High
Guardian Alphakey:		ZZZZZZZZZZZ
Application Number:		ZZZZZZZZZZZZ
Case Number:		ZZZZZZZZZZZZZZZZZZZZ
Annual Income:	0.00	9,999,999.99
Application Date:	07/01/2015	
Effective Date:	07/01/2015	
Payor Status:	Both ▼	
Student Status:	Active ▼	
Application Status:	Active ▼	
Letter Sent:	No ▼	
Application Denied:	No ▼	
Application Type:	All ▼	

Where both Application Date and Effective Date are 07/01/ of the current year

☑ Select All Default Entities [Entities]

☐ Select All Lunch Codes [Lunch Codes]

Where only the D Lunch Code is selected

☑ Only Print Most Recent Application for Payor
☐ Include ALL students for Payor if one falls within the Default Entity Range

Letter Setup

Heading Line 1:	
Heading Line 2:	
Heading Line 3:	
Contact Name:	
Address:	
City/State/Zip:	
Phone:	
Email:	
Signature Name:	
Title:	
Respond By:	10/01/2015
Follow-up Response:	10/01/2015
Letter Options:	☐ Print Payor Titles
	☑ Set Letter Sent Field
	☐ Breakfast Served

These dates don't really affect anything, but a date is required in order to save the template. Make sure the Set Letter Sent box is checked

Reduced Cost Descriptions

Lunch Description:	
Breakfast Description:	

Free Approved Letters:

Letter Selection

Letter Type: ⦿ Payor Application
○ Prior Year Application
○ Temporary Application
Letter By: ⦿ Guardian ○ Payor
* Custom Food Service Letter: Free Letter

Application Ranges

	Low	High
Guardian Alphakey:		ZZZZZZZZZZZ
Application Number:		ZZZZZZZZZZZZ
Case Number:		ZZZZZZZZZZZZZZZZZZZZZ
Annual Income:	0.00	
Application Date:	07/01/2015	
Effective Date:	07/01/2015	

Payor Status: Both
Student Status: Active
Application Status: Active
Letter Sent: No
Application Denied: No
Application Type: All

Where both Application Date and Effective Date are 07/01/ of the current year

☑ Select All Default Entities   Entities
☐ Select All Lunch Codes   Lunch Codes
☑ Only Print Most Recent Application for Payor
☐ Include ALL students for Payor if one falls within the Default Entity Range

Where only the F, G, H and O Lunch Codes are selected

Letter Setup

Heading Line 1:
Heading Line 2:
Heading Line 3:
Contact Name:
Address:
City/State/Zip:
Phone:
Email:
Signature Name:
Title:
Respond By: 10/01/2015
Follow-up Response: 10/01/2015
Letter Options: ☐ Print Payor Titles
☑ Set Letter Sent Field
☐ Breakfast Served

These dates don't really affect anything, but a date is required in order to save the template Make sure the Set Letter Sent box is checked

Reduced Cost Descriptions
Lunch Description:
Breakfast Description:

Note: the Prior year – about to Expire letter is covered in another document for expiring applications
Reduced Approved Letter:

Letter Selection

Letter Type: ● Payor Application
○ Prior Year Application
○ Temporary Application
Letter By: ● Guardian ○ Payor
* Custom Food Service Letter: Reduced Letter

Application Ranges

	Low	High
Guardian Alphakey:		ZZZZZZZZZZZ
Application Number:		ZZZZZZZZZZZZ
Case Number:		ZZZZZZZZZZZZZZZZZZZZZ
Annual Income:	0.00	9,999,999.99
Application Date:	07/01/2015	
Effective Date:	07/01/2015	

Where both Application Date and Effective Date are 07/01/ of the current year

Payor Status: Both
Student Status: Active
Application Status: Active
Letter Sent: No
Application Denied: No
Application Type: All

☑ Select All Default Entities   [Entities]

Where only the R Lunch Code is selected

☐ Select All Lunch Codes   [Lunch Codes]
☑ Only Print Most Recent Application for Payor
☐ Include ALL students for Payor if one falls within the Default Entity Range

Letter Setup

Heading Line 1:
Heading Line 2:
Heading Line 3:
Contact Name:
Address:
City/State/Zip:
Phone:
Email:
Signature Name:
Title:
Respond By: 10/01/2015
Follow-up Response: 10/01/2015
Letter Options: ☐ Print Payor Titles
☑ Set Letter Sent Field
☐ Breakfast Served

These dates don't really affect anything, but a date is required in order to save the template Make sure the Set Letter Sent box is checked

Reduced Cost Descriptions
Lunch Description:
Breakfast Description:

**(05) Messages you get during the application process**

This document is for the person that processes Food Service free/reduced meal applications and covers some of the common messages that come up during the application process

When processing Food Service applications, various messages pop up, depending on what you're trying to do. It's very important that you read these messages and understand what they're saying. Otherwise, there could be very unintended consequences
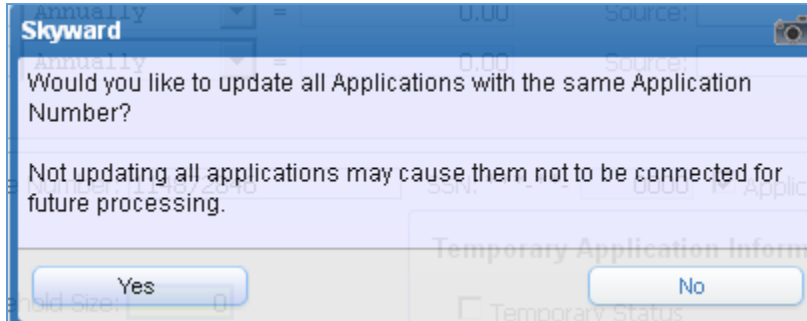
Scenario: you're processing/editing an application, which, when you save it, prompts you with the following, which indicates the Application Number you've entered is already in use. The message is asking you if you still want to use this number

Answer: if you're getting this message because you had already processed another application for someone else in the same household and given them this application number, click on Yes. If you did not just assign this number to someone else in the household, or are not sure, select No. Worst case scenario if you select No is that two different letters will be printed for this family. Worst case scenario if you select Yes is that 1 letter will be sent to multiple households
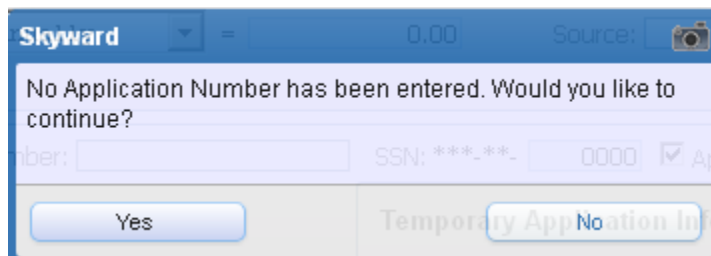
Scenario: you've processed an application and clicked on Save, which resulted in the message that No Application Number has been entered

Answer: if you're processing an Income Eligible, Food Stamp or Foster application, you should enter an Application number, so you would click No here. If it's any other type of application you would click Yes to continue here
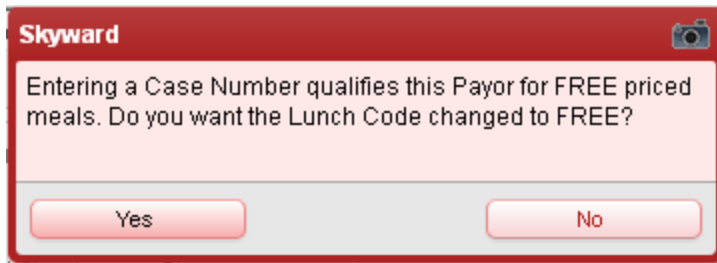
Scenario: you've processed an application, which included a Food Stamp case number. At some point during the process you'll get the message that Entering a Case Number qualifies for Free – do you want the Lunch Code to be Free? (meaning it will automatically enter a Lunch Code of F)
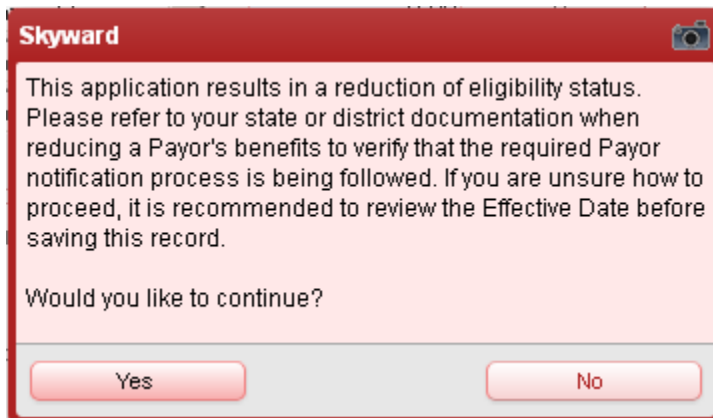
Answer: if you've processed an app with a Food Stamp case number, the Lunch Code should be G. If you say Yes to the prompt above, you'll have to change the automated F to a G. If you say No, you'll just manually type in the G

Scenario: you've processed an application which, upon saving, informs you that this application results in a reduction of eligibility – they either went from Free to Reduced/Paid or Reduced to Paid. I believe you only get this message if you process another application within the same school year.

Answer: Because eligibility is good for the entire year, families don't need to submit a new app if their circumstances have changed, so there really should be any reason that, for the current school year, they should have a reduction in benefits (this doesn't include the 30 day carryover students). You'll **likely** want to say No here
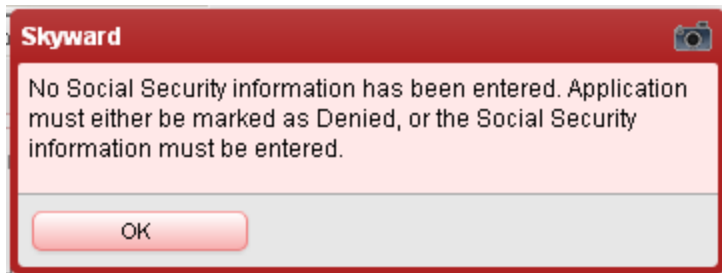
Scenario: you've entered an application and Saved it, which resulted in the prompt that No Social Security information was entered

Answer: Income Eligible applications require something be entered in the Social Security area. You'll want to make sure the paper app has the SS number on it, but it's not necessary to enter the last 4 into Skyward. All you need to do is check the box that the applicant has no SS#
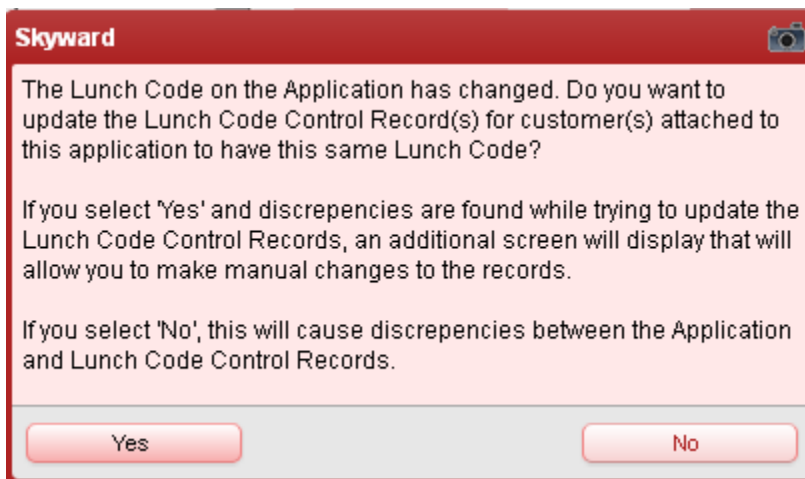
This one is **VERY** important!!!!!

Scenario: you've edited an application that resulted in a change in benefits. Example: you processed it and it said they were Paid. You then realized you entered too much income so you Edit the app and correct it. When you Save it, you get the message that the Lunch Code on the Application has changed, which asks you if you want to also update the Lunch Code Customer Control Record

Answer: Yes, you do want to do update the CCR! If you recall, the only purpose in processing an application is so that it can calculate the student's eligibility. Once the app is created, it also creates the Customer Control Record Lunch Code, which is what actually determines what the student is charged in line.

Note: the **(22) RESA FS Customer Control Record vs. Application report** should be run on a weekly/monthly basis to see if there are any discrepancies in the application Lunch Code and the

Customer Control Record Lunch Code. It's very important that you run this report prior to submitting your monthly reimbursement so that you're reporting students with the correct reimbursement rate

Also note: these inconsistencies don't just result from changes you make to an application. There are certain Skyward processes that can also cause these not to match
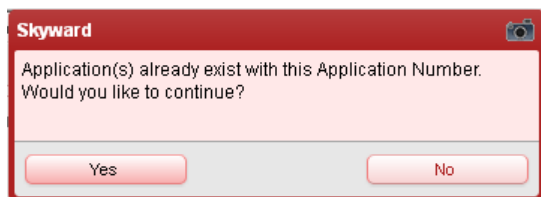
Scenario: you've processed an application, entered an application number, and saved the app, which results in a message that that application number is already in use. Do you want to continue?

Answer: Skyward doesn't keep track of application numbers for you, which means you have to keep track of them yourself. If you are creating individual apps for members of the same household, you do want them to have the same app number, so you would say Yes. However, if you're not adding someone else to an existing application, you would not want to continue. Giving two different households the same application number will result in numerous issues. It's very important that you do not accidentally combine households by giving them the same app number
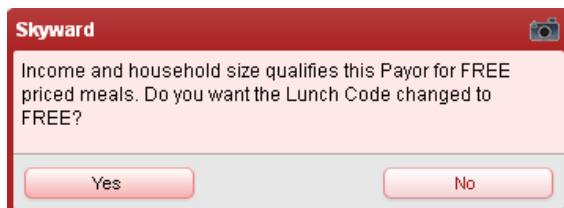
Scenario: you've entered an Income Eligible application which prompts you that based on Income and household size, the student qualifies for Free. It asks if you want to change the Lunch Code to Free (which would be the F code)

Answer: F is your default Lunch Code for Free. Anytime you process an app that results in a free status, the system is going to want to insert the F lunch code. In this case – income eligibility –the Lunch Code should be an F. If you say Yes here, it will populate the LC field for you. If you say No, you'll just manually type in an F

Scenario: you've entered application information and click on the Save button, which results in a message that the Lunch Code cannot be blank

Answer: this occurs when you haven't entered enough information for the system to be able to calculate a lunch code. For example, you've entered income information, but didn't indicate the number of people in the household. The system can't determine the lunch code without the household size, so when you saved it there was no Lunch Code listed in the app. Make the necessary corrections and Save it again

(06) 30 Day Carryover Eligibility

This document is for anyone that wants to know how the 30 day carryover eligibility works for free/reduced eligible students.

Free/Reduced meal eligibility must be determined on a yearly basis. Once a student is eligible, they are eligible for the entire year, regardless of changing circumstances. So, if a student is becomes homeless for 1 day only, they are eligible for the entire year based on that 1 day of homelessness

Furthermore, for every new school year, any student that was free/reduced the previously year gets 30 school days into the new year at the old eligibility. This gives the parents time to fill out a new application. On the 30th school day of the new school year, the RESA runs a process that creates a new application for any students that were previously free/reduced that have not yet filled out a new application for the current year

Prior to the 30th day, districts should send expiring notices out to those that haven't yet reapplied. These notices shouldn't be sent out too early, as parents may already have filled out applications that haven't yet been processed. A good rule of thumb is 2 weeks before that 30th day – around the end of September, beginning of October. See **(04a) Expiring Applications** for instructions on running a report and/or printing letters for any expiring students

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This document will show you how to set up a template to mass change all students who were Free or Reduced in the previous school year and did not apply/qualify for Free or Reduced after the 30 day carryover window. ==This will need to be ran after lunch, at the end of the day prior to your change date #6 above.==

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1. **From the 000 Entity select Food Service/Payor-Customer Maintenance/Setup/Utilities (WS/FS/PM/PS/UT)**
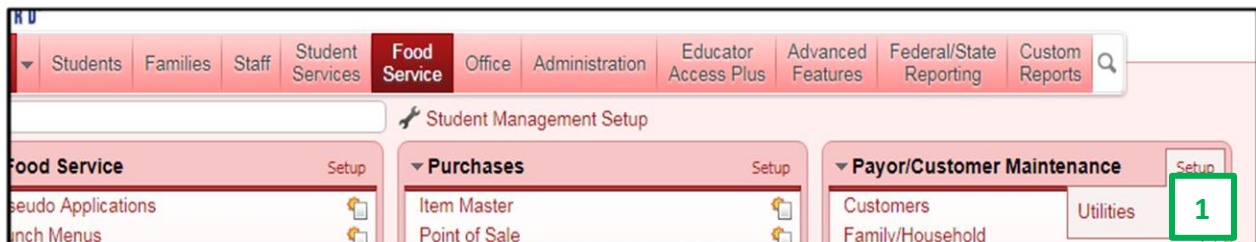
2. **In Utilities select the Change Code by Application Date**
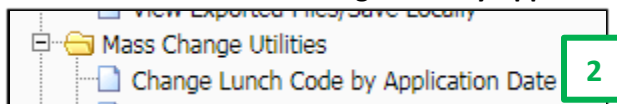
3 – 8. **Set up your template using the example below ==USING CURRENT YEAR INFORMATION==**

3 – 8. Set up your template using the example below USING CURRENT YEAR INFORMATION

Utility Ranges

This process will do the following if a Payor's application and lunch code fall within the ranges:
- Create a new application for the payor.
- Change the payor and his/her assigned customers' lunch codes to be the New Lunch Code selected.

To determine if the above information should be changed, the process checks for the following:
- An application for the payor that falls between the Previous Application Entered Date ranges.
- An application does not exist for the payor on or after the Payor Application Effective Date.
- The Payor's lunch code matches one of the selected Lunch Codes to Change.

After the process has completed then a report will be run to show the differences between Payor and Customer lunch codes because these people may have to be updated manually.

Save
Save and Process
Back

Template Settings

* Template Description: 17-18 30 Day Carryover   **3**
☐ Share with other users in entity 000

Utility Ranges

	Low	High
* Previous Application Entered Date:	01/01/1900	06/30/2017 **4**
* Payor Application Effective: **5**	06/30/2017	(Date prior to the date the first application became effective for the new year.)
* Change Customer Effective Date:	10/17/2017 **6**	1 school days from the start of school)

31 school days from the start of school

Select Lunch Codes To Change   **7**

* New Lunch: **8** P ▼ Paid

Lunch Code Selection

	Include	Code ▲	Description
1	☑	D	DC
2	☑	F	Free
3	☑	G	FS
4	☑	H	Homeless
5	☑	O	Foster
6	☐	P	Paid
7	☐	Q	DC Reduced
8	☑	R	Reduced
9	☐	S	Staff
10	☐	V	Visitor

Save
Back
Select All 10 Records
Deselect 10 Records

(07) Verification Guide

This is for the person/people in your district that will be performing the Food Service Verification process in October and November. It's a guide on the steps that need to be completed. There is corresponding documentation on how to perform each of these tasks

Note: the Verification sample must be pulled from data that was in effect ON October 1st, but the process doesn't need to be run on the first. It can be run at any time, provided you leave enough time to have all responses in, and recorded, by November 15th

Sampling Method to Use:
- **Error-Prone (Standard):** if you received less than an 80% response rate from last year's Verification process, you will be required to use this sampling method for the current year. Your superintendent will usually get an email indicating this method must be used
- **Random (Alternate 1)**: if you're not required to use the Error-Prone (Standard) method, you can select from this option or the next
- **Focused (Alternate 2)**: if you're not required to use the Error-Prone (Standard) method, you can select from this option or the previous one

(07b) Update the following Verification Letter Templates:
- Benefits Decreased – F/R to Paid
- Benefits Increased
- Benefits Reduced – Free to Reduced
- Failure to Respond
- No Change in Benefits
- Verification Notice

(07a) Update the following Verification Letters:
- Benefits Increased
- Benefits Reduced – F to R
- Benefits Terminated – F/R to P
- Failure to Respond
- No Change in Benefits
- Verification Notice

(07c) Pull your Verification Sample and print the notices:
Note: don't forget to include documentation on acceptable forms of proof
Note: you can reprint the notices as many times as needed if you don't get a response the first time. Just remember to **(07a)** update the letter to include a new respond by date

(07d) Record Verification responses
(07e) Send Verification Response letters
(07f) Complete the Verification process
(07g) Print your Verification reports

(07a) Updating Verification Letters

This document is for the person that sends out the Food Service Verification letters/notices. It covers how to update the actual letters

Food Service Letters typically need to be updated from one year to the next. The letter, which contains the actual verbiage on whether or not they were approved for free/reduced meals, usually contains year specific dates, prices…

To update the Verification Letters:
1. From the **000** entity, click on the **Food Service** tab
2. Under the **Payor/Customer Maintenance** module, in the **Application Letters** section, click on **Maintain Letter Templates**
3. Highlight **Benefits Decreased – F/R to Paid** and click on **Edit Form**
4. Make any necessary changes
5. In the upper right-hand corner, click on **Save & Close**
6. **Repeat** for the following:

   - Benefits Increased
   - Benefits Reduced – Free to Reduced
   - Failure to Respond
   - No Change in Benefits
   - Verification Notice

Note: quite often the USDA non-discrimination statement is updated from one year to the next. You'll want to make sure that the letter contains the most recent verbiage. For the 2016 school year it was so long that it wouldn't all fit on one page. There have been issues in the past with the letter taking up more than one page, in that at times the next letter would print at the bottom of the previous letter's 2nd page. Some districts elected to take the notice out of the actual letter in Skyward and either print a stack of the notices out to attach to the letters or to rerun the letters upside down in the printer and print the statement on the back

You'll also want to make sure that if the USDA requirements for letter verbiage has changed that you update the letter

(07b) Updating Verification Letter Templates

This document is for the person that sends out the Food Service Verification letters/notices. It covers how to update the letter templates that tell the system who to print the letters for

Food Service Templates don't typically need to be updated from one year to the next, as they just tell the system who to print the letters for and do not contain dates that need to be changed

To verify the Verification Letter Templates are set up correctly:
1. From the **000** entity, click on the **Food Service** tab
2. Under the **Application Verification** section, click on **Verification Letters**
3. Click on **Print Verification Letters**
4. You should see a list of at least 6 templates here:
   - Benefits Decreased – F/R to Paid
   - Benefits Increased
   - Benefits Reduced – Free to Reduced
   - Failure to Respond
   - No Change in Benefits
   - Verification Notice

If you're missing any options, click on the **Add** button and use the following pages as a guide on how to set up your own templates

If you have all the options, click on **Edit** and verify the information on the following pages:

Note: if you didn't create the template, you won't be able to edit it. In that case, Clone the existing template and give it the same name, but with your initials at the beginning. Example: BK: Benefits Increased

Benefits Decreased – F/R to Paid

Template Description: Benefits Decreased – F/R to Paid
Share with other users in entity 000: check this
Custom Food Service Letter: Benefits Decreased – F/R to Paid
Respond By: this date doesn't really affect anything – just make it today's date
Follow-up Response: this date doesn't really affect anything – just make it today's date
Letter Sent: this should be set to **Both**

- **Note**: normally this would be set to **No** so that you would only be printing notices for those you haven't already notified. However, due to common problems in this area, it's suggested that you set it to print all responses, whether or not a response has already been sent. As a result, you'll possibly get a new letter for those you've already sent one to. You can discard these duplicate notices

Response Types: uncheck Select All
Select Responses: P: Responded Changed to Paid
Increase Number of Contacts Counter: uncheck this
Letter Setup section: you don't need to do anything here

Click on **Save**

Benefits Increased

Template Settings

* Template Description: `Benefits Increased`

☑ Share with other users in entity 000

☐ Print Greenbar

Letter Ranges

* Custom Food Service Letter: `Benefits Increased` ▼

Respond By: `09/28/2015`

Follow-up Response: `09/28/2015`

	Low	High
Verification Key:		`ZZZZZZZZZZ`

Letter Sent: `Both` ▼

Response Types: ☐ Select All   [Select Responses]

☐ Increase Number of Contacts Counter

Letter Setup

Template Description: Benefits Increased
Share with other users in entity 000: check this
Custom Food Service Letter: Benefits Increased
Respond By: this date doesn't really affect anything – just make it today's date
Follow-up Response: this date doesn't really affect anything – just make it today's date
Letter Sent: this should be set to **Both**

- **Note**: normally this would be set to **No** so that you would only be printing notices for those you haven't already notified. However, due to common problems in this area, it's suggested that you set it to print all responses, whether or not a response has already been sent. As a result, you'll possibly get a new letter for those you've already sent one to. You can discard these duplicate notices

Response Types: uncheck Select All
Select Responses: F: Responded Changed to Free
Increase Number of Contacts Counter: uncheck this
Letter Setup section: you don't need to do anything here

Click on **Save**

Benefits Reduced – Free to Reduced

Template Description: Benefits Reduced – Free to Reduced
Share with other users in entity 000: check this
Custom Food Service Letter: Benefits Reduced – Free to Reduced
Respond By: this date doesn't really affect anything – just make it today's date
Follow-up Response: this date doesn't really affect anything – just make it today's date
Letter Sent: this should be set to **Both**
- **Note**: normally this would be set to **No** so that you would only be printing notices for those you haven't already notified. However, due to common problems in this area, it's suggested that you set it to print all responses, whether or not a response has already been sent. As a result, you'll possibly get a new letter for those you've already sent one to. You can discard these duplicate notices

Response Types: uncheck Select All
Select Responses: R: Responded Changed to Reduced
Increase Number of Contacts Counter: uncheck this
Letter Setup section: you don't need to do anything here

Click on **Save**

Failure to Respond

Template Description: Failure to Respond
Share with other users in entity 000: check this
Custom Food Service Letter: Failure to Respond
Respond By: this date doesn't really affect anything – just make it today's date
Follow-up Response: this date doesn't really affect anything – just make it today's date
Letter Sent: this should be set to **Both**

- **Note**: normally this would be set to **No** so that you would only be printing notices for those you haven't already notified. However, due to common problems in this area, it's suggested that you set it to print all responses, whether or not a response has already been sent. As a result, you'll possibly get a new letter for those you've already sent one to. You can discard these duplicate notices

Response Types: uncheck Select All
Select Responses: N: No Response
Increase Number of Contacts Counter: uncheck this
Letter Setup section: you don't need to do anything here

Click on **Save**

No Change in Benefits

Template Description: No Change in Benefits
Share with other users in entity 000: check this
Custom Food Service Letter: No Change in Benefits
Respond By: this date doesn't really affect anything – just make it today's date
Letter Sent: this should be set to **Both**

- **Note**: normally this would be set to **No** so that you would only be printing notices for those you haven't already notified. However, due to common problems in this area, it's suggested that you set it to print all responses, whether or not a response has already been sent. As a result, you'll possibly get a new letter for those you've already sent one to. You can discard these duplicate notices

Follow-up Response: this date doesn't really affect anything – just make it today's date
Response Types: uncheck Select All
Select Responses: C: No Change
Increase Number of Contacts Counter: uncheck this
Letter Setup section: you don't need to do anything here

Click on **Save**

Verification Notice

Template Description: Verification Notice
Share with other users in entity 000: check this
Custom Food Service Letter: Verification Notice
Respond By: this date doesn't really affect anything – just make it today's date
Letter Sent: this should be set to **Both**

- **Note**: normally this would be set to **No** so that you would only be printing notices for those you haven't already notified. However, due to common problems in this area, it's suggested that you set it to print all responses, whether or not a response has already been sent. As a result, you'll possibly get a new letter for those you've already sent one to. You can discard these duplicate notices

Follow-up Response: this date doesn't really affect anything – just make it today's date
Response Types: uncheck Select All
Select Responses:
Increase Number of Contacts Counter: uncheck this
Letter Setup section: you don't need to do anything here

Click on **Save**

(07c) Verification Process

This document is for the person in your district that will be pulling the Verification Sample. It covers how to pull the sample and print the letters

Note: once the sample has been pulled, all you need to do is send the letters to the selected households. After that, there's nothing more to do until the responses come back

Prior to starting the Verification process, you'll want to run the following:
- **(20)** **Sync Payor Status Audit** utility
- **(22)** **RESA FS Customer Control vs. Application report**
- **(21)** **RESA FS Lunch Code Errors report**

Once these reports and the utility have been run and verified, you can proceed with this document.

Pulling your sample:
1. From the **000** entity, click on the **Food Service** tab
2. Under the **Application Verification** section, click on **Verification Processes**
3. Click on **Maintain Verification Samples**
4. If prompted, set the school year to the current school year and click on **Apply**
    - **Note:** in the 2017-18 school year, this should be 2018
5. On the right-hand side of the screen, click on **Create Sample**
6. Select your **Sample Type**
    - **Note**: make sure to see if your district is on the list of districts required to use the Random sampling method. If you are, you MUST select Random. If you're not, you can select any option
7. The **Count Date** field, which is misleading (since it has nothing to do with Count Day), should be set to **Oct. 1st**, which is the date you use from which to pull your sample
8. **Uncheck** the box for **All Lunch Codes**
9. Click on the **Lunch Codes** button
10. All options should be checked except for P(paid), S(staff) and V(vistor)
11. Click on **Save**
12. **Uncheck** the **All Schools** checkbox
13. Click on the **Schools** button
14. Check any/all schools applicable for Verification
    - An example of a school you wouldn't want checked is if your district has a Food Service entity set up. These all start with FS and were set up only to feed students not enrolled in your district. If the students in this entity are eligible for Verification, check the entity. If not, don't.
15. Click on **Save**
16. Click on **Run**
17. When prompted if you're sure, click on **Yes**
18. Once the report has finished generating, click on **View** to see the students that were selected for Verification
19. **Print** the report for your records
20. You'll get a prompt for 'when processing has finished' – click on **OK**

21. Click on **Back**
22. On the right-hand side of the screen, click on **Print Letters**
23. Highlight the **Verification Notice** and click on **Print**
24. Print an extra copy of the letters to attach to the original application
25. Mail the letters

Note: if you were to now look at the application of one of the students selected, you would see a V listed, indicating this application was selected for Verification

▼ Applications	Add Application				
		Temp?	Appl Date	Effective Date	Active?
▶ Edit	V	No	08/24/2015	08/24/2015	Yes

(07d) Recording Verification Responses

This document is for the person that will be recording the Verification responses in Food Service. The responses are the documents you get from the households selected for Verification proving their income/eligibility

There are a few different scenarios on how to handle verification responses:

Food Stamp application - no response, you did not contact DHS:
1. On the last day of Verification, create a new application for the affected students
2. For **Income**, enter **$1**
3. For **Effective Date**, add 10 days to today's date (they get the 10 day grace period if they didn't respond)
4. When prompted that the student qualifies for **Free**, select **No**
5. For **Application Number**, enter **Verification Response**
6. Set the **Lunch Code** to **P**
7. Enter a **Household Size** of **1** (this will keep the application from displaying on the Application Errors report)
8. Check the box for **Applicant Has No SSN**
9. Set **Letter Sent** field to **Yes**
10. Set **Application Denied** to **Yes**
11. In the **Application Comments** section, indicate that you did not get a response for Verification
12. Click on **Save**
    - **Note**: if you've already created a new application for verification purposes (either this year or any other), you may get a message when you save the application that the application number is already in use. What this is telling you is that there is already an application out there with an app number of Verification Response. Therefore, yes, you do want to continue
13. **Clone** the application to any other kids in the household/on the application
14. Skip to **Recording the Verification Responses** section below and use **N – No Response** for the **Response Action**
15. Make note of all attempts to contact the applicant and put them with your verification paperwork

Food Stamp application - no response, you did contact DHS and they are not getting Food Stamps:
1. On the day you got the response from DHS, create a new application for the affected students
2. For **Income**, enter **$1**
3. For **Effective Date**, add 10 days to whatever date you talked to DHS (they get the 10 day grace period in this case)
4. When prompted that the student qualifies for **Free**, select **No**
5. For **Application Number**, enter **Verification Response**
6. Set the **Lunch Code** to **P**
7. Enter a **Household Size** of **1** (this will keep the application from displaying on the Application Errors report)
8. Check the box for **Applicant Has No SSN**

9. Set **Letter Sent** field to **Yes**
10. Set **Application Denied** to **Yes**
11. In the **Application Comments** section, indicate that you did not get a response for Verification
12. Click on **Save**
    - **Note**: if you've already created a new application for verification purposes (either this year or any other), you may get a message when you save the application that the application number is already in use. What this is telling you is that there is already an application out there with an app number of Verification Response. Therefore, yes, you do want to continue
13. **Clone** the application to any other kids in the household/on the application
14. Skip to **Recording the Verification Responses** section below and select **P – Responded Changed to Paid** for the **Response Action**
15. Make note of how you confirmed the information and put it with your verification paperwork

---

Food Stamp application - no response, you did contact DHS and they are getting Food Stamps:
1. Skip to the **Recording the Verification Response** section below and select **D – Directly Verified** for the **Response Action**
2. Make note of how you confirmed the information and put it with your verification paperwork

---

Food Stamp application – responded with proof and they are getting Food Stamps:
1. Skip to the **Recording the Verification Response** section below and select **C – No Change** for the **Response Action**

Income Eligible application – did receive a response:
1. On the day you receive the response, create a new application for the affected students
2. Enter the information you received on proof of income like you would if it was a regular application
3. For the **Effective Date**, use the date that you're processing the application (**today's date**)
4. For **Application Number**, enter **Verification Response**
5. Check the box for **Applicant Has No SSN**
6. Set **Letter Sent** field to **Yes**
7. Click on **Save**
    - **Note**: if you've already created a new income eligible application for verification purposes (either this year or any other), you may get a message when you save the application that the application number is already in use. What this is telling you is that there is already an application out there with an app number of Verification Response. Therefore, yes, you do want to continue

Results of verification application:
Changed from Reduced to Free
- Clone the application to any other applicable students
- Skip to the section below on **Recording the Verification Reponses**
- Use **F – Responded Changed to Free** for the **Response Action**

Changed from Free to Reduced

- Edit the application and increase the Effective Date by 10 days
- Clone the application to any other applicable students
- Skip to the section below on **Recording the Verification Reponses**
- Use **R – Responded Changed to Reduced** for the **Response Action Responses**

Changed from F/R to Paid
- Edit the application and increase the Effective Date by 10 days
- Clone the application to any other applicable students
- Skip to the section below on **Recording the Verification Reponses**
- Use **P – Responded Changed to Paid** for the **Response Action**

No Change:
- Skip to the section below on **Recording the Verification Reponses**
- Use **C – No Change** for the **Response Action**

Income Eligible application – informed by applicant that circumstances have changed and they're no longer eligible so they're not going to send anything:
1. On the day you this information, create a new application for the affected students
2. For **Income**, enter **$1**
3. For **Effective Date**, add 10 days to whatever date you got this information (they get the 10 day grace period in this case)
4. When prompted that the student qualifies for **Free**, select **No**
5. For **Application Number**, enter **Verification Response**
6. Set the **Lunch Code** to **P**
7. Enter a **Household Size** of **1** (this will keep the application from displaying on the Application Errors report)
8. Check the box for **Applicant Has No SSN**
9. Set **Letter Sent** field to **Yes**
10. Set **Application Denied** to **Yes**
11. In the **Application Comments** section, indicate that circumstances have changed and they no longer qualify
12. Click on **Save**
   - **Note**: if you've already created a new income eligible application for verification purposes (either this year or any other), you may get a message when you save the application that the application number is already in use. What this is telling you is that there is already an application out there with an app number of Verification Response. Therefore, yes, you do want to continue
13. **Clone** the application to any other kids in the household/on the application
14. Skip to **Recording the Verification Responses** section below and select **P – Responded Changed to Paid** for the **Response Action**
15. Make note of any conversations with the applicant and put it with your verification paperwork

Income Eligible application – did not receive a response:
1. On the last day of Verification, create a new application for the affected students
2. For **Income**, enter **$1**

3. For **Effective Date**, add 10 days to today's date (they get the 10 day grace period if they didn't respond)
4. When prompted that the student qualifies for **Free**, select **No**
5. For **Application Number**, enter **Verification Response**
6. Set the **Lunch Code** to **P**
7. Enter a **Household Size** of **1** (this will keep the application from displaying on the Application Errors report)
8. Check the box for **Applicant Has No SSN**
9. Set **Letter Sent** field to **Yes**
10. Set **Application Denied** to **Yes**
11. In the **Application Comments** section, indicate that you did not get a response for Verification
12. Click on **Save**
    - **Note**: if you've already created an application for verification purposes (either this year or any other), you may get a message when you save the application that the application number is already in use. What this is telling you is that there is already an application out there with an app number of Verification Response. Therefore, yes, you do want to continue
13. **Clone** the application to any other kids in the household/on the application
14. Skip to **Recording the Verification Responses** section below and use **N – No Response** for the **Response Action**
15. Make note of any attempts to contact the applicant and put it with your verification paperwork

---

Foster application – did receive proof
1. Skip to **Recording the Verification Responses** section below and use **C – No Change** for the **Response Action**

Foster application – did not receive a response
1. On the last day of Verification, create a new application for the affected students
2. For **Income**, enter **$1**
3. For **Effective Date**, add 10 days to today's date (they get the 10 day grace period if they didn't respond)
4. When prompted that the student qualifies for **Free**, select **No**
5. For **Application Number**, enter **Verification Response**
6. Set the **Lunch Code** to **P**
7. Enter a **Household Size** of **1** (this will keep the application from displaying on the Application Errors report)
8. Check the box for **Applicant Has No SSN**
9. Set **Letter Sent** field to **Yes**
10. Set **Application Denied** to **Yes**
11. In the **Application Comments** section, indicate that you did not get a response for Verification
12. Click on **Save**
    - **Note**: if you've already created an application for verification purposes (either this year or any other), you may get a message when you save the application that the application number is already in use. What this is telling you is that there is already an application out there with an app number of Verification Response. Therefore, yes, you do want to continue

13. **Clone** the application to any other kids in the household/on the application
14. Skip to **Recording the Verification Responses** section below and use **N – No Response** for the **Response Action**
15. Make note of any conversations with the applicant and put it with your verification paperwork

---

Recording the Verification Responses:
1. From the **000** entity, click on the **Food Service** tab
2. Under the **Application Verification** section, click on **Verification Processes**
3. Click on **Enter Verification Responses**
4. If prompted for the school year, click on **Apply**
5. Highlight the applicant's name that you have the response from and click on **Edit**
6. For the **Response Date**, enter today's date
7. From the **Response Action** dropdown menu, select the appropriate option:

- **C – No Change**: select this option if the proof they've supplied matches their original application
- **D – Directly Verified**: used if you were able to contact DHS and have them verify that this is a Food Stamp recipient
- **F – Responded Changed to Free**: select this option if the proof supplied shows that they should go from Reduced to Free
- **N – No Response**: select this option only when you are completing verification and have not received a response
- **P – Responded Changed to Paid**: select this option if the proof supplied results in a Paid status
- **R – Responded Changed to Reduced**: select this option if the proof supplied results in a Free student going to Reduced
- **W – Waiting for Response**: this is the default response, which will be in effect until you change it to one of the options above

8. Click on **Save**
9. Repeat for any remaining responses

If you're ready to print the response letters, refer to **(07e) Sending Verification Response Letters**

(07e) Sending Verification Response Letters

This document is for the person printing the verification response letters to households letting them know if there was a change in their eligibility. These steps will be completed after a response has been recorded for an applicant

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1. From the **000** entity, click on the **Food Service** tab
2. Under the **Application Verification** section, click on **Verification Letters**
3. Click on **Print Verification Letters**
4. Select the appropriate template, based on the verification outcome
5. Click on **Print**
6. Print an extra copy for your records and put it with your verification paperwork

(07f) Completing Verification

This document is for the person in your district that enters the Food Service Verification Responses and sends the notices/letters. This process would be followed on/shortly after November 15th, which is the date the Verification must be completed and responses must be recorded

If you received responses from all those selected for Verification, and have already printed their letters, there's nothing more to do other than print **(07g) Verification Reports**

If you have anyone that has not responded, complete the following:
1. From the **000** entity, click on the **Food Service** tab
2. Under the **Application Verification** section, click on **Verification Processes**
3. Click on **Enter Verification Responses**
4. Highlight the applicant's name that did not respond and click on **Edit**
5. For the **Response Date**, enter 11/15
6. From the **Response Action** dropdown menu, select **No Response**
7. Click on **Save**
8. Repeat for any remaining responses
9. Go into Food Service Payors and process an application for the affected students like you would any other. However, do the following:

   - Enter an Application Number of **Verification**
   - Enter a **Lunch Code** of **Paid**
   - If prompted to change the Lunch Code to Free, select **No**
   - Enter a Comment in the application that there was no response from Verification so you're creating a Paid application for the student
   - Check the box for **No SS#**
   - Repeat for any remaining students

10. Print the **(07e) Verification Response Letter**

To print the Verification Reports, refer to **(07g) Verification Reports**

(07g) Verification Reports

This document is for the person in your district that will be running the Verification Reports once the Verification Process has been completed

Once all responses have been recorded, and all letters printed out, you'll print/save the Verification Reports. You'll need this information for your LEARS report for January:

Note: the following information was true in Zangle but has not been tested in Skyward. Regardless, it's still best practice to follow it: You might want to wait until the MSDS General Collection Count has closed before running your verification reports. **Example reason**:

- A student is absent on count day, which is 10/1 (example date only!). They have up to 30 days to return before the school exits the student. So, in this example, they have until 10/31 to return
- You run your verification report on 10/20. The student is still enrolled and will be included in your verification counts
- The student does not return and is exited from the district on 11/2
- You rerun the verification reports on 11/15, which will now be 1 student off from the results you got on 10/20

1. From the **000** entity, click on the **Food Service** tab
2. Under the **Application Verification** section, click on **Verification Reports**
3. Click on **Verification Sampling Responses**
4. Highlight the Skyward template for **Current Year Verification Sampling** and click on **Print**
5. **Print** or **Save** the report for your records
6. Click on **Back**
7. Click on the **Verification Collection Report**
8. Click on **Run**
9. Save a copy of the report for your records. If you want to print just the results out, repeat this process, but uncheck Print Student Detail. You should have a record of the kids included, but don't need to print them all out.

(08) Free/Reduced Eligible after Count Day

This document is for the Food Service director, the person that processes applications, or the MSDS submission person. It provides instruction on obtaining a list of students that became free/reduced eligible after count day

Explanation: for Count Day, Skyward will only pull free/reduced eligibility for students that were free/reduced ON count day. However, the state allows you to report any students that were **enrolled on** count day, but became free/reduced **eligible after** count day. You'll have to create a report of eligible students to give to the MSDS submission person, who will make these students Free/Reduced in CEPI for the General Collection

1. From the **000** entity, click on the **Food Service** tab
2. From the **Payor/Customer Maintenance** section, click on **Payors**
3. From the **Views** dropdown menu, select **Applications**
4. Click on the word **Filters**

I do see a template called XX: October Count Day Eligible and/or **XX: February Count Day Eligible (where XX is your initials)**
5. Highlight the template and click on the button to **Edit** Filter
6. Change the **Effective Date Low Value** to the day after Count Day:

7. In the upper right-hand corner, click on **Save and Apply Filter**
8. If have results for students that are **free** or **reduced**, click on the Excel icon in the upper right-hand corner of the screen:

9. Click on **Export**
10. Once the report has finished generating, click on **Download Exported File**
11. Save the file to your hard drive and email it to your MSDS submission person. Any students on this list, as long as they were enrolled as of Count Day, can be manually made free/reduced in CEPI. Any kids becoming free/reduced after count day, and up until the final day for certification, can be made free/reduced

I do not see a filter called XX: October Count Day Eligible and/or **XX: February Count Day Eligible (where XX is your initials)**
5. Click on **Add Filter**
6. Give the filter a Name of **XX: October Count Day Eligible** (or February, if needed)
7. Set your filter up with the following options. **Note**: there are some choices missing from my screenshot, as they don't apply. Just look at the ones in the screenshot and make your fields look the same:
   - **Note**: for the **Effective Date Low Value**, enter the day after count day

8. In the upper right-hand corner, click on **Save and Apply Filter**
9. If have results for students that are **free** or **reduced**, click on the Excel icon in the upper right-hand corner of the screen:

10. Click on **Export**
11. Once the report has finished generating, click on **Download Exported File**
12. Save the file to your hard drive and email it to your MSDS submission person. Any students on this list, as long as they were enrolled as of Count Day, can be manually made free/reduced in CEPI. Any kids becoming free/reduced after count day, and up until the final day for certification, can be made free/reduced

(09) Uploading an Early Roster file to get Applicable Direct Cert students

This document is for the person that submits the CEPI MSDS information for Count Day. It provides instruction on uploading an Early Roster file to CEPI prior to Count Day

Explanation: in order for a student to appear in a Direct Cert file for your district, the State needs to know that that student attends your district. For incoming students, the State wouldn't normally know these kids attended your district until Count Day. However, if you want to get them the appropriate DC status, an Early Roster needs to be uploaded through CEPI so that the State knows to include these new students in the upcoming DC files.

Early Rosters can be uploaded multiple times around the beginning of the school year. CEPI will send out a notice of cutoff dates for including students in a DC file. For example, they might say that in order for students to be included in the 9/8 DC file, and Early Roster must be uploaded by 9/1. You should take note of these dates on your calendar.

It's not required that this be done. However, it's in the district's best interest to do so, as it cuts down on the number of parents that have to fill out free/reduced applications, as well as the amount of time it takes to process applications

1. From the **000** entity, click on the **Federal/State Reporting** tab
2. From the **Michigan State Reporting** module, click on **Michigan Student Data System**
3. Click on **Extract MSDS Data**

I do see a template called XX: Early Roster NN (where XX is my initials and NN is the school year)
4. Highlight the template and click on **Edit**
5. In the **Required Grade Level Setup** section, do you see a red message that setup is required? If so, otherwise, skip to step 6:
   - Click on the **Setup Required Grade Levels** button
   - Each '**Actual Grade**' level shown needs to be mapped to a CEPI appropriate grade level. For example, grade 13 should be mapped to grade 12. Any E grades should be mapped to grade 30. To map a grade with a missing **Grade to Use in Export**, highlight the grade and click on **Edit Grade to Use**. Select the appropriate grade level from the dropdown menu and click on Save. Once all grades have been corrected, click on **Back**
   - **Note**: you may need to press **F5** to refresh your screen if you still see the red error
6. If necessary, change the **School Year** to the current school year
   - **Note**: for the 15-16 school year, for example, this would be 2016
7. If necessary, change the **Enrollment Dates** to the whole school year. Example: 7/1/xx to 6/30/xx
   - **Note**: when the dates encompass the entire year, you don't need to update it again if you rerun it for the current year
8. Click on **Save and Print**
9. Once processing has finished, click on **View**
10. Scroll through the first few pages to see if the top of one of them (usually the 1st or 2nd page) says **Student Error Report**. If so, you'll need to resolve the error and repeat the process. If not:
11. **Close** the report
12. Click **Back** on the Extract MSDS screen

13. Click **Export Extracted MSDS Data**
14. Select the current school year and the Early Roster collection
15. Click on **Run**
16. Once processing has finished, click on **Back**. You don't need to view anything here
17. Click on **View Exported files/Save local for submission**
18. Highlight the **Early Roster** file you just created and click on **View**
19. If prompted, select to **Save File**. Save it to your hard drive
20. Log into CEPI and upload the Early Roster file
Note: Instructions on uploading the file to CEPI are outside the scope of this document

Depending on the date you uploaded the file, the new students will appear in one of the next refreshed DC files

I do not see a template called XX: Early Roster NN (where XX is my initials and NN is the school year)
4. Click on **Add**
5. Give the template a description of **XX: Early Roster NN** (where XX is your initials and NN is the current school year)
6. Check the box to **Share with other users**
7. In the **Required Grade Level Setup** section, do you see a red message that setup is required? If so, otherwise, skip to step 8:
   - Click on the **Setup Required Grade Levels** button
   - Each '**Actual Grade**' level shown needs to be mapped to a CEPI appropriate grade level. For example, grade 13 should be mapped to grade 12. Any E grades should be mapped to grade 30. To map a grade with a missing **Grade to Use in Export**, highlight the grade and click on **Edit Grade to Use**. Select the appropriate grade level from the dropdown menu and click on Save. Once all grades have been corrected, click on **Back**
   - **Note**: you may need to press **F5** to refresh your screen if you still see the red error
8. If necessary, change the **School Year** to the current school year
   - **Note**: for the 15-16 school year, for example, this would be 2016
9. From the **Collection** dropdown menu, select **Early Roster**
10. For the **Output Type**, select **Extract Only**
11. Check the box to **Include Error Students in the MSDS Extract**
12. If necessary, change the **Enrollment Dates** to the whole school year. Example: 7/1/xx to 6/30/xx
   - **Note**: when the dates encompass the entire year, you don't need to update it again if you rerun it for the current year
13. **Uncheck** the Include **All Schools** check box
14. Click on the **Schools** button
15. Check all schools that you need to submit students for. You would not check the 000 entity or, where applicable any FSx (Food Service) entities
16. Click on **Save**
17. **Uncheck** Include **All Calendars**
18. **Click** on the **Calendars** button
19. Select all Calendars that should be submitted
20. Click on **Save**
21. Click on **Save and Print**
22. Once processing has finished, click on **View**

23. Scroll through the first few pages to see if the top of one of them (usually the 1st or 2nd page) says **Student Error Report**. If so, you'll need to resolve the error and repeat the process. If not:
24. **Close** the report
25. Click **Back** on the Extract MSDS screen
26. Click **Export Extracted MSDS Data**
27. Select the current school year and the Early Roster collection
28. Click on **Run**
29. Once processing has finished, click on **Back**. You don't need to view anything here
30. Click on **View Exported files/Save local for submission**
31. Highlight the **Early Roster** file you just created and click on **View**
32. If prompted, select to **Save File**. Save it to your hard drive
33. Log into CEPI and upload the Early Roster file

Note: Instructions on uploading the file to CEPI are outside the scope of this document

Depending on the date you uploaded the file, the new students will appear in one of the next refreshed DC files

(10) Payments and Account Balances – Everything You Need to Know

This document is for anyone who has to record, report or adjust Food Service payments and/or balances. It covers the following areas:
- Different ways payments can be recorded
- Different ways payments can be corrected
- Different scenarios for adjusting account balances
- Common Options for Payment Reporting

Different ways payments can be recorded

Skyward's Food Service provides many different ways to record payments on a student's account. Any number of them may be used by different people within the building/district:
- Using the **(11) Payment Entry** option: this would typically be used by cashiers at elementary buildings, where payments are sent down to the cafeteria to be recorded. Office staff may also use this option if payments can be given to them
- **(38b) Recording Payments in the POS**: used by cashiers when students are making payments in the cafeteria line
- **(37a** and **37b) Purchase Entry by Homeroom**: in buildings where breakfasts are served in the classroom, and where Purchase Entry by Homeroom is being used, payments can be recorded in this application
- From **Food Service/Customers**: in the Primary Payor section of the Customer record, there's the option to Add a Payment. This would typically be used by the FS director when payments need to be fixed/refunded
- From **Food Service/Payors**: in the Payment History section of the Payor record, there's the option to Add a Payment. This would typically be used by the FS director when payments need to be fixed/refunded
- If you are using an online payment service, parents can also make payments online through their Family Access account

Different Ways Payments Can be Corrected/Moved
- Using the **(11) Payment Entry** option: with the appropriate permissions, cashiers can make changes to recorded payments using the Payment Entry application. This is not advised, but can be given if needed. Typically, they will only have the ability to fix them here prior to the FS Alert-Batch Updates being run
- **POS**: once a payment is recorded in the POS line, no one has the ability to change it from within the POS
- **(37a** and **37b) Purchase Entry by Homeroom**: once a payment has been recorded here, no one has the ability to change it from within Purchase Entry by Homeroom
- **From Food Service/Customers**: This would typically be used by the FS director when payments need to be fixed/refunded. **Documents 16a – 16f**
- **From Food Service/Payors**: This would typically be used by the FS director when payments need to be fixed/refunded. **Documents 16a – 16f**
- By running the **(27) Update Prior Balances Utility**: this utility can either zero out prior balances for selected range or move prior balances to active siblings
- By running the **(18) Remove Customer Purchases and Payments** utility

Different scenarios for adjusting account balances:

- **(16a) Adjusting a Food Service Account Balance**: use this document when you need to make an adjustment to a student's account and where no money will be exchanging hands
- **(16b) Correcting a Payment Recorded on the Wrong FS Account**: use this document when a payment was mistakenly recorded on one account but should have been put on another
- **(16c) Correcting a Payment recorded for the wrong amount**: use this document when a payment was recorded for the wrong amount and needs to be corrected
- **(16d) Refunding Money from a Food Service Account**: use this document when a parent is requesting a refund from a student's FS account
- **(16e) Splitting Payments Mistakenly Recorded on One Student's Account**: use this document when an entire payment was applied to one student's account but should have been split among multiple
- **(16f) Transferring Money from One FS Account to Another**: use this document when a parent has requested that all or part of a balance be transferred from one student to another

---

Common Options for Payment/Account Balance Reporting

These are just some of the areas where you can find information on payments and account balances. See corresponding documentation for details on how to run the different reports
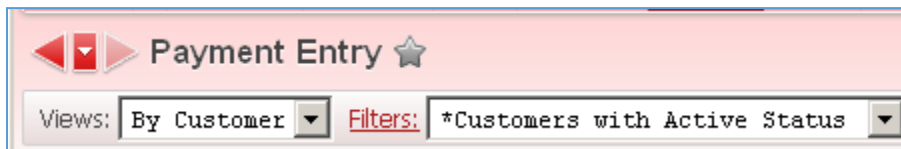
- **(12) Check Deposits Report**: even though it's called Check Deposits, it also reports cash payments. Can be run for a selected day/date range
- **(34b) RESA FS Daily Summary Report**: provides a summary of payments by building and district-wide
- **(34a) RESA FS Monthly Summary Report**: provides detail as well as summary payment information by building and district-wide
- **(48) Daily Charge-Credit Report**: shows the payment amount, purchase amount, along with the Charge/Credit amount. Can be run with detail, which shows student names, or with totals only. Can also be run by individual cafeterias and for a particular date/date range
- **(14) Payor Balance Notices**: these are the notices that get sent home notifying parents of negative account balances
- **(15) Payor Balance Summary**: provides a list of students and account balances
- **(25a) Payor-Customer Meal Statement**: provides detail for account purchases and payments. Used when a parent is questioning a student's account balance

(11) Payment Entry

This document is for anyone that records payments outside of the POS line. Examples would be when the office records payments or when payments are sent to the cafeteria, where they're recorded before students come through the line

It includes instructions for entering payments, along with some other information found in Payment Entry

1. From the entity for which the payments should be recorded, click on the **Food Service** tab
2. From the **Payments** module, click on **Payment Entry**
3. From the **Views** dropdown menu, select either **By Customer** or **By Payor** (they should both produce the same results)
4. From the **Filters** dropdown menu, select **Customers with Active Status**

5. Search for the account you're recording the payment for
6. With the name highlighted, click on the Add Payment button on the upper right-hand corner of the screen
7. If prompted for the **Payment Entry Defaults**, select the Cafeteria where this money will be added to the cash drawer and click on **Save**
8. If needed, change the **Date of Payment**
9. The **Record Type** should be set to **Payment**
10. If you weren't prompted in step 7 to enter a default cafeteria, make sure the correct one is listed. It should be the cash drawer that the money will be put in
11. If it's a check, enter the **Check Number**
12. Enter the **Payment Amount**
13. Click on **Save & Close**
14. **Repeat** for any remaining payments

Other information found in Payment Entry:

At the top of the screen you can change the Views dropdown option to **By Date** to see the following:

	Date ▼	Date Total	Cafe AHS Total	Cafe AHS1 Total	Cafe AHS2 Total	Cafe AHS3 Total	Cafe AMS Total	Cafe AMS1 Total
1	▶ 09/13/2015	62.50	37.50	0.00	0.00	0.00	25.00	0.00
2	▶ 09/12/2015	20.00	20.00	0.00	0.00	0.00	0.00	0.00
3	▶ 09/11/2015	708.90	150.00	146.50	156.75	29.40	110.00	116.25
4	▶ 09/10/2015	674.15	30.00	144.85	215.60	46.70	80.00	157.00
5	▶ 09/09/2015	1,537.60	200.00	574.25	360.25	112.75	120.00	170.35
6	▶ 09/08/2015	2,617.60	531.00	880.60	633.25	0.00	0.00	572.75
7	▶ 09/07/2015	250.00	250.00	0.00	0.00	0.00	0.00	0.00
8	▶ 09/03/2015	80.00	80.00	0.00	0.00	0.00	0.00	0.00
9	▶ 09/02/2015	125.00	125.00	0.00	0.00	0.00	0.00	0.00

You can click the dropdown arrow to the left of any date to see details of who payments were recorded for, as well as the cafeteria it was recorded on

If you change the Views dropdown option to By Cafeteria, this is what you see:

	Cafeteria ▲	Short Description	Long Description	Entity	Calendar	Cafeteria Total
1	▶ AHS	Grades 9-12	Grades 9-12	400	400	1,423.50
2	▶ AHS1	Gr. 9-12 Line 1	Gr. 9-12 Line 1	400	400	1,746.20
3	▶ AHS2	Gr. 9-12 Line 2	Gr. 9-12 Line 2	400	400	1,365.85
4	▶ AHS3	Gr. 9-12 Line 3	Gr. 9-12 Line 3	400	400	188.85
5	▶ AMS	Grades 7-8	Grades 7-8	400	400	335.00
6	▶ AMS1	Gr. 7-8 Line 1	Gr. 7-8 Line 1	400	400	1,016.35

You can click the dropdown arrow to the left of any Cafeteria to see all transactions recorded this year on that particular register

(12) Check Deposits Report

This document is for whoever needs to run a report showing recorded deposits on Food Service accounts. It can be run for a particular date or a date range.

Note: even thought this report is called Check Deposits Report, it also reports on Cash payments

1. From either the **000** entity (which will give you all buildings), or from an individual entity (for those that only have access to their own building), click on the **Food Service** tab
2. From the **Food Service** module, click on **Reports**
3. Click on the **Check Deposits Report**

I <u>do</u> have a report listed called XX: Daily Deposits – POS only, where XX is my initials:
4. Highlight **XX: Daily Deposits – POS Only** and click on **Edit**
5. Make the **Date of Payment** dates whatever date range(s) you wish to report on
   - **Note**: make sure you're updating **Date of Payment** and not Last Modified Date
6. Click on **Save** and **Print**

I do <u>not</u> have a report listed called XX: Daily Deposits – POS only, where XX is my initials:
4. Click on **Add**
5. Give the template a description of **XX: Daily Deposits – POS only** (where XX is your initials)
6. Check the box to **Share with other users**
7. Make the **Date of Payment** dates whatever date range(s) you wish to report on
   - **Note**: make sure you're updating **Date of Payment** and not Last Modified Date
8. In the Payment From section, uncheck everything but Wand Entry
   - **Note**: if you use the Payment Entry option to record payments, and want to include these payments in the report as well, keep Payment Entry checked and take out 'POS Only' from your template description
9. Click on **Save and Print**

Sample report:

IER NAME	CSH?	CHK NBR	S	F	T	PAY AMOUNT
Julia		260	P	P	P	20.00
ki, Sophie	Y		P	P	P	0.75
, Kevin	Y		P	P	P	20.00
rath, Nolan	Y		P	P	P	8.00

(13) Change Payor Balance Notice Indicator

This document is for the person that prints the negative balance notices and covers how to enable the printing of negative balance notices for staff members

Explanation: when a student Food Service customer is created, the system defaults their account to say yes to receive balance notices. However, with staff, it sets them to no – do not print balance notices. If you're printing faculty notices and someone with a negative balance is set to no, it will not print for that person. There's a utility you can run prior to printing the notices to make sure everyone is set to Yes

1. From the **000** entity, click on the **Food Service** tab
2. On the **Food Service** module, click on **Setup/Utilities**
3. Under the **Mass Change Utilities** section, click on **Change Payor Balance Notification Indicator**

I <u>do</u> have a template called XX: Set Notification to Yes in my name (where XX is my initials):
4. Highlight **XX Set Notification to Yes** and click on **Process**
5. If you get a message that No records were found to process, click on **Back** and **Back** again, then continue with whatever you need to do next. Otherwise, skip to step 6
6. Click on **Preview Data to Process**. This will produce a list of anyone who is currently set to NO
7. Click on **Back**
8. Click on **Run the Update**
9. Click on **OK**
10. Once the process has completed, click on **Back**. You do not need to display the report
11. Click on **Back** to exit the **My Print Queue Screen**

I <u>don't</u> have a template called XX: Set Notification to Yes (where XX is my initials)**:**
4. Click on **Add**
5. Give it a Template Description of **XX: Set Notification to Yes** (where XX is your initials)
6. Check the box to **Share with other users in entity 000**
7. For **Lunch Code**, check the box to **Select All**

Template Settings

* Template Description: BK: Set Notification to Yes

☑ Share with other users in entity 000

Utility Ranges ?

	Low	High
Payor Key:		ZZZZZZZZZZ

Payor Status: Both ▼

New Balance Indicator Value: Yes ▼

Lunch Code: ☑ Select All   Lunch Codes

Customer Ranges ☐ **Use Ranges**

8. Click on **Save and Process**
9. If you get a message that No records were found to process, click on **Back** and **Back** again, then continue with whatever you need to do next. Otherwise, skip to step 10
10. Click on **Preview Data to Process**. This will produce a list of anyone who is currently set to NO
11. Click on **Back**
12. Click on **Run the Update**
13. Click on **OK**
14. Once the process has completed, click on **Back**. You do not need to display the report
15. Click on **Back** to exit the **My Print Queue Screen**

(14) Payor Balance Notices

This document is for whoever prints the notices that go home to parents indicating a student has a negative account balance. It includes the following:
- How to print the notices
- How to email the notices and print only those that need them

To print the notices:
1. From the **000** entity, click on the **Food Service** tab
2. Under the **Food Service** module, click on **Reports**
3. Under the **Payor/Customer reports** section, select **Payor Balance Noti**ces

I <u>do</u> have a template called XX: Neg Balance Notices (where XX is my initials)
4. Highlight the template and click on **Print**

I <u>do not</u> have a template called XX: Neg Balance Notices (where XX is my initials)
4. Click on **Add**
5. Enter a **template description** of your initials, followed by Neg Balance Notices. IE: **BK – Neg Balance Notices**
    - **Note**: if you send notices for different amounts from different buildings, make the Template Description descriptive enough to know which is which. For example, add HS to one and Ele to the other
6. If you're sending notices out for different buildings based on different balance amounts, enter the entity number of the one you're creating it for in both the Entity Low and Entity High fields. For example, I send notices out for elementary students when they owe any amount, and for secondary students when they owe $10 or more. This is what my templates would look like:

Sample template for High School (entity 400)

Sample template for Elementary buildings (entities 100-104)

7. Check the box to **Share with other users in entity**
8. Change the right-hand side **High Balance** amount to whatever negative amount you want to send these home for. **Example**: if you want any negative balance, enter -.01. If you want only those who owe $10 or more, enter -10
9. Change the **Customer Status** dropdown to **Active**
10. Uncheck the **All Name Types** check box
11. Click the 'next' button to get to the second page
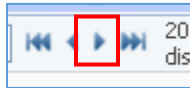
12. Check the **Student** option and click on **Save**
13. In the **Report Options** section, change **Print Only If**: to **Any Customer is within range**
14. For the **Print Notices On** dropdown, choose **Letter Head** if you want to print them 1 to a page and include your district letterhead on the notice. Click on **Plain Paper** if you wish to print them 3 to a page
15. In the upper right-hand corner, click on the **Sort** button
16. In most districts, the Sort option really only works for elementary buildings where students are assigned to a homeroom. The only option for secondary, if they do not have the homerooms set up behind the scenes, is to sort by grade or building. If you're running these notices for elementary, check the box for Homeroom and click on **OK**
17. Click on **Save** (or **Save & Print** if you wish to print them now)

How to email notices:

Skyward now has the ability to email Payor Balance Notices rather than printing them and sending them home. When you select the email option and run the report, anyone with an email in Skyward will receive the email. For anyone that doesn't have an email, a notice will be printed. Emails can be sent for both students and faculty. You can Preview the notices before you send them, which will show you how many are being emailed vs. will get letters. You can also schedule the report to email daily/weekly/as often as you'd like.

This is what the email that the parent gets looks like:
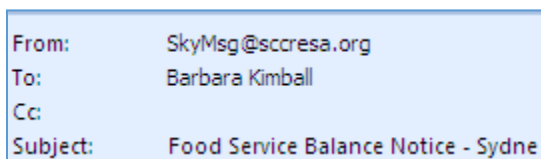
```
After meals were served today, 05/28/2015, your payor account has a balance of $-6.50.

Thank You,


-----------------------------------------------------------------
District: East China School District
District Web Site:
State: MI
District Code: 74050

East China School District - Live Conversion Data 04/05/13
-----------------------------------------------------------------
```

This is the default verbiage, as far as the top part, which you can't change, but you can add additional text if you want to

Here's how to set it up:

1. From the **000** Entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Reports**
3. From within the **Payor/Customer Reports** section, click on **Payor Balance Notices**
4. Click on **Add** to create a new template
5. Give the template a name of **XX: Email Notices NN** (where XX are your initials and NN is the building name/code)
   - **Note**: you'll want to create a separate report template for each building if you give the statements that need to be printed to the individual buildings. If you create one template and run it for the whole district, the printed notices will print out alphabetically and there's no way to differentiate what school the kids go to. If you're mailing them home, you can generate them district wide
6. Check the box to **Share this template with other users in entity 000**
7. From the **Delivery Method** dropdown menu, select **Email**
8. If you're going to email/print these for separate buildings, enter the Entity Low and High numbers for the building
   - **Note**: if you don't know your entity numbers, refer to **(02) District Codes and Utilities** for your building
9. In the **Report Ranges** section, enter a **High Balance** amount. This will be the negative number you want parents to start receiving the email for
10. Change the **Customer Status** to **Active**

Payor Balance Notices

Template Settings

* Template Description: BK: Email Notices

☑ Share this template with other users in entity 000
☐ Print Greenbar

Payor Balance Notices: ○ By Family ● By Range ○ By Individual Payors [Payor]

Delivery Method: Email ☑ Run As Preview

Report Ranges

	Low	High
Entity:		ZZZZ
School:		ZZZZ
Homeroom:		ZZZZZ
Grade/Grad Yr:	9999	0000
Payor Key:		ZZZZZZZZZZZZ
Balance:	-99,999,999.99	-1.00
Customer Status	Active	
Payor Status:	Both	

☑ All Name Types [Name Types]

☑ All Lunch Codes [Lunch Codes]

[Exclude Students with Category Codes]

11. From the **Report Options** section, change **Send Email To**: to **Guardian Home Email Only**
12. From the **Print Only if**: dropdown menu, select **Any Customer is within ranges**
13. From the **Print Notices on**: dropdown menu, select how you want PRINTED notices to print:
    - **Letter Head**: leaves a header space at the top of the page if you want to use paper that has your letter head on it. If you mail letters home, this is the one you'll want to select
    - **Labels**: prints on sticker labels
    - **Plain Paper**: prints 3 to a page. If you hand the notices out, this might be the one you want to select
14. At the bottom of the template, check the 4 boxes shown below:

Report Options

Send Email To: Guardian Home Email Only

Print Only if: Any Customer is within ranges

Salutation: 'To Payor of'

Print Notices on: Letter Head

- ☐ Exclude Zero Balances
- ☐ Print Payor's Last Payment
- ☐ Process only customers with a purchase today
- ☐ Exclude Parents Who Receive Nightly Low Bal Emails
- ☑ Balance From Payor Record
- ☑ Print Payor's Address
- ☑ Display Parameters Page on Report
- ☐ Print Class Period
- ☑ Print Homeroom
- ☑ Print Payor's Balance when Payor has no Customer
- ☐ Print Phone Number

15. In the upper right-hand corner, click on the **Layout** button
16. Check the box to **Default Notice Date to today**
17. If you'd like to add any additional text to the notice, this is where you'll enter it
18. Click on **Save**
19. The first time you run this, you'll run it with the **Run As Preview** box checked. Doing this will provide a report of all customers getting the notice, as well as whether they'll get a printed notice or an email. Once you verify it looks as it should, close the report, uncheck the **Run As Preview** box and click on **Save and Print**
20. You'll get the following notice, which you'll say **OK** to:

Once the report has finished processing, you'll get the following information in it:
- The notices that you actually need to mail/hand out
- A summary of all recipients and the delivery method
- A final page with the parameters you selected for the report

(15) Payor Balance Summary

This document is typically for Food Service directors and can be used to report on all student balances, but is typically used to report on negative balances

Note: the top part of this document is for running reports throughout the course of the school year. At the end of this document is a section on creating a report for the year-end

1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Reports**
3. Click on **Payor Balance Summary**

I do have a template called XX: Negative Balances (where XX is my initials):
4. Highlight the template and click on **Print**

Sample:

```
                        DFLT CAFE    PAYOR
PAYMENTS     SALES      BALANCE      BALANCE
     9.00       10.00   **********      -0.15
    40.75       42.50   **********      -1.75
    71.50       74.75   **********      -3.25
    15.00       15.75   **********      -0.75
```

Note: the report also includes Student Name, Address and Phone Number, which have been excluded for privacy purposes

I do not have a template called XX: Negative Balances (where XX is my initials):
4. Click on **Add**
5. Give the template a description of **XX: Negative Balances NN** (where XX is my initials)
6. Check the box to **Share with others in entity**
7. From the **Report Type** dropdown menu, select **By Customer's Default Cafeteria**
8. Check the box to **Use Payor Table for Balances**
9. Set **Payor Status** to **Active**
10. For **Balance Due**, set the **High** value to the minimum negative amount you want to report on. For example, if you want to see all students that owe $10 or more, the Low Value would remain at -99,999,999, but you would change the High Value to -10
11. Click on **Save and Print**

Note: the report will sort based on the student's default cafeteria. Each cafeteria will show totals at the bottom of that particular cafeteria, and will page break on each cafeteria. **Example**:

In the high school, there are 31 Payors that made payments totaling $766.44, purchased goods totaling $862.85, and, collectively, owe $53.87

```
31 TOTAL # OF PAYORS         ***  TOTAL FOR CAFETERIA AHS         766.44        862.85          0.00        -53.87
```

Setting up the report for the year-end

Follow the same steps above, with the following differences:
- Call the report "**Year End Summary**"
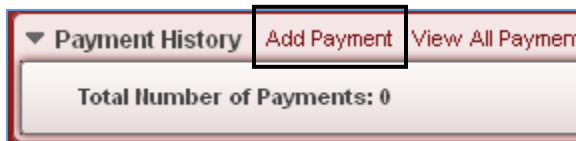- In the Balance Due fields, the low should be -9999999999 and the high should be 9999999999

(16a) Adjusting a Food Service Account Balance

This document is typically for the FS director. Follow these steps when you need to make a correction to a Food Service account balance, but no money will be trading hands. You're just correcting something that's wrong or you're zeroing out a balance a customer shouldn't have
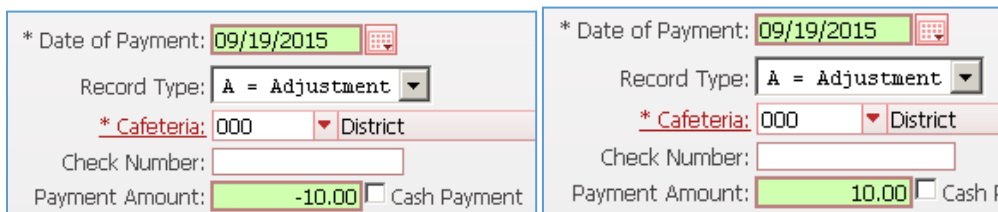
Scenario: a student has a negative account balance but shouldn't, for whatever reason. You just want to zero out the account so that it doesn't show the student owes anything

Note: This will typically be done by the Food Service director using the 000 café. As of Sept. 25th, adjustments (which this scenario would be), are sometimes reported as payments. Therefore, if you record a negative adjustment on a FS account, it will appear on some reports as a negative payment. Subsequently, a positive adjustment may look like an actual payment on some reports. Therefore, any adjustments should be recorded from the 000 café and, ideally, recorded on a weekend day so as to avoid it being reported with actual payments

1. From within **Skyward**, click on the **Food Service** tab
2. From the **Payor/Customer Maintenance** module, click on **Payors**
3. Find the student's account that you need to adjust and expand the record
4. In the **Payment History** section, click on **Add Payment**

5. For the **Date of Payment**, select a **weekend** day
6. For **Record Type**, select **Adjustment**
7. For **Cafeteria**, use **000**
8. Record a negative amount if the student has a positive balance you need to erase, or a positive amount if the student has a negative balance you need to erase

9. Click on **Save and Close**
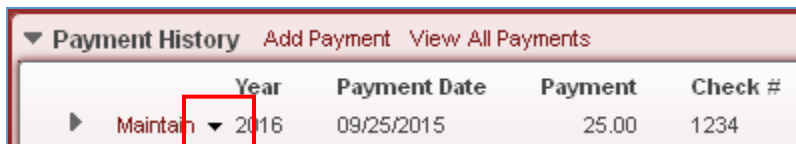
(16b) Correcting a Payment Recorded on the Wrong FS Account

This document is typically for the FS director. Follow these steps when a payment was entered on the wrong student's account and needs to be corrected

---

Scenario: Peter Pan gave you $20, but you accidentally recorded the payment for Paul Pan. You need to remove it from Paul and give it to Peter


Note: this would normally be done by the Food Service director, as cashiers don't typically have access to this area
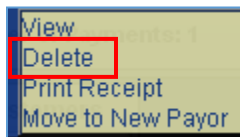
1. From within **Skyward**, click on the **Food Service** tab
2. From the **Payor/Customer Maintenance** module, click on **Payors**
3. Find the student's account that the payment was mistakenly added to and expand it
4. Expand the **Payment History** section:

5. <mark>Take note of the date the payment was recorded, along with the check number (if applicable), and the cafeteria it was recorded on</mark>
6. Click the dropdown arrow to the right of **Maintain** and click on **Delete**
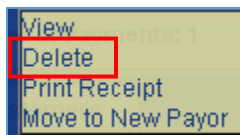
7. When prompted if you're sure, click on **Yes**
8. Find the student's account that the payment should have been recorded on and expand it
9. Expand the **Payment History** section
10. Click on **Add Payment**:
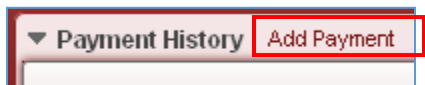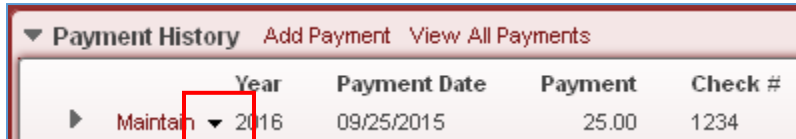
11. Record the **Date of Payment** the original payment was recorded on
12. Select the **Cafeteria** the original payment was recorded in
13. Enter the **Check Number** if applicable
14. Enter the **Payment Amount** that should have been applied to this student's account
15. Click on **Save and Close**

(16c) Correcting a Payment recorded for the wrong amount

This document is typically for the FS director and would be used when a payment was recorded for the wrong amount and needs to be fixed

1. From within **Skyward**, click on the **Food Service** tab
2. From the **Payor/Customer Maintenance** module, click on **Payors**
3. Find the student's account that had the whole amount put on it and expand the record
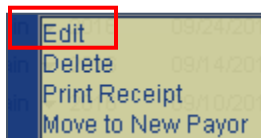4. Expand the **Payment History** section:

5. Take note of the date the payment was recorded, along with the check number (if applicable), and the cafeteria it was recorded on
6. Click the dropdown arrow to the right of **Maintain**

If you **don't have** an **Edit** option, it means the utility has already been run. You'll need to Delete the payment and recreate it for the correct amount. See the appropriate section below
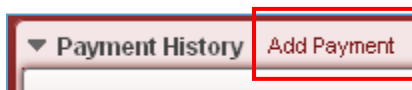

If you **do have** an **Edit** option, it means the utility has not yet been run and you can just Edit the existing payment. See the appropriate section below

What to do if you only have the Delete option:
7. From the **Maintain** dropdown menu, select **Delete**
8. When prompted if you're sure, click on **Yes**
9. Click on **Add Payment**:

10. Record the **Date of Payment** the original payment was recorded on
11. Select the **Cafeteria** the original payment was recorded in
12. Enter the **Check Number** if applicable
13. Enter the **Payment Amount** that should have been applied to this student's account
14. Click on **Save and Close**

What to do if you have the Edit option:
7. From the **Maintain** dropdown menu, select **Edit**
8. Change the **Payment Amount** to what should have been recorded:

9. Click on **Save and Close**

(16d) Refunding Money from a Food Service Account

This document is typically for the FS director and would be used when a Food Service account has a positive balance on it and the parent is requesting a refund

1. From within **Skyward**, click on the **Food Service** tab
2. From the **Payor/Customer Maintenance** module, click on **Payors**
3. Find the student's account that you're issuing the refund from and expand it
4. In the **Payment History** section, click on **Add Payment**
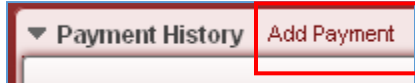
5. **Date of Payment**: if a check is being issued, use a weekend date. If money is coming out of a cash drawer, use the date it is being taken out of the drawer
6. **Record Type**: set this to Refund
7. **Cafeteria**: if a check is being issued, this should be 000. If the money is coming out of a cash drawer, use the drawer it's coming from
8. **Payment Amount**: record this as a negative amount
9. Click on **Save and Close**

(16e) Splitting Payments Mistakenly Recorded on One Student's Account

This document is typically for the FS director and would be used when a payment was recorded on one student's account but was supposed to have been split between multiple accounts

Scenario: a student has a $25 check, which is recorded only on this student's account. However, it was meant to be distributed between 2 students

Note: this process will be different depending on whether or not the FS batch processes have been run, which 'finalize' transactions. You'll easily be able to tell when you go in to split the payment

Note: this would normally be done by the Food Service director, as cashiers don't typically have access to this area
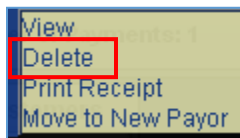
1. From within **Skyward**, click on the **Food Service** tab
2. From the **Payor/Customer Maintenance** module, click on **Payors**
3. Find the student's account that had the whole amount put on it and expand the record
4. Expand the **Payment History** section:
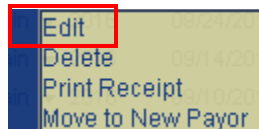

5. Take note of the date the payment was recorded, along with the check number (if applicable), and the cafeteria it was recorded on
6. Click the dropdown arrow to the right of **Maintain**

If you **don't have** an **Edit** option, it means the utility has already been run. You'll need to Delete the payment and recreate it for the correct amount. See the appropriate section below
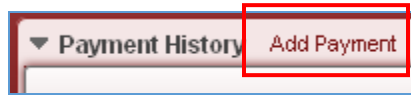

If you **do have** an **Edit** option, it means the utility has not yet been run and you can just Edit the existing payment. See the appropriate section below

What to do if you only have the Delete option:
7. From the **Maintain** dropdown menu, select **Delete**

8. When prompted if you're sure, click on **Yes**
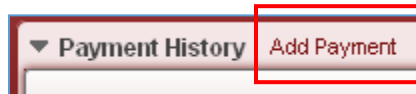9. Click on **Add Payment**:

10. Record the **Date of Payment** the original payment was recorded on
11. Select the **Cafeteria** the original payment was recorded in
12. Enter the **Check Number** if applicable
13. Enter the **Payment Amount** that should have been applied to this student's account
14. Click on **Save and Close**
15. Repeat steps 9 – 14 for the remaining student(s) that should have received part of the payment

What to do if you have the Edit option:
7. From the **Maintain** dropdown menu, select **Edit**
8. Change the **Payment Amount** to what should have been recorded:

9. Click on **Save and Close**
10. Search for the other student you need to add the payment for and expand his/her record
11. In the **Payment History** section, click on **Add Payment**:

12. Record the **Date of Payment** the original payment was recorded on
13. Select the **Cafeteria** the original payment was recorded in
14. Enter the **Check Number** if applicable
15. Enter the **Payment Amount** that should have been applied to this student's account

16. Click on **Save and Close**

**(16f) Transferring Money from One FS Account to Another**

This document typically would be used by the FS director when money needs to be transferred from one Food Service account to another

Scenario: a student has graduated/exited the district and has money left on his/her Food Service account. The parent has requested that the balance be transferred to another student's account

Note: This will typically be done by the Food Service director using the 000 café. As of Sept. 25th, adjustments (which this scenario would be), are sometimes reported as payments. Therefore, if you record a negative adjustment on a FS account, it will appear on some reports as a negative payment. Subsequently, a positive adjustment may look like an actual payment on some reports. Therefore, any adjustments should be recorded from the 000 café and, ideally, recorded on a weekend day so as to avoid it being reported with actual payments

Note: you can also run the **(27) Update Prior Balance** Utility, which will take the **Inactive** student's account balance and distribute it evenly amongst all active siblings

1. From the **000** entity, click on the **Food Service** tab
2. From the **Payor/Customer Maintenance** module, click on **Payors**
3. Find the student's account that the money will be transferred from and expand the record
4. In the **Payment History** section, click on **Add Payment**
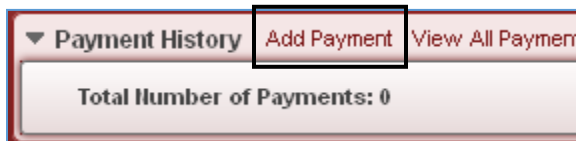
5. For the **Date of Payment**, select a **weekend** day
6. For **Record Type**, select **Adjustment**
7. For **Cafeteria**, use **000**
8. Record a negative amount for the amount being transferred

9. Click on **Save and Close**
10. Repeat for the student you're transferring the money to, using the same Date of Payment, Adjustment and Cafeteria options. However, you'll enter a positive amount for the student receiving the money

* Date of Payment: 09/19/2015

Record Type: A = Adjustment

* Cafeteria: 000 District

Check Number:

Payment Amount: 10.00 ☐ Cash P

(17) Update Student Default Cafeterias

This document is typically for the Food Service director and provides instruction on updating students' Default Cafeterias for Food Service.

Explanation: When the RESA ran the year-end rollover in July, all default cafeterias were updated for students. However, if any students have switched buildings, or have since been retained back to a grade that puts them in a different building, the default cafeterias will need to be updated by you. This should be run weekly at least through the end of September, and at the end of each month thereafter

1. If there are **FS Alerts**, follow **(50a) FS Alerts-Batch Updates – FS Director**
2. From the **000** entity, click on the **Food Service** tab
3. In the **Food Service** module, click on **Year End**
4. Click on **Change Customer Default Cafeteria**
5. Highlight the first **RESA** template in the list and click on **Process**. If no records were found, click on **Back** and repeat for remaining. Otherwise:
6. Click on **Preview Data to Process**
7. Click on **Back**
8. Click on **Run the Update**
9. Click on **OK**
10. Click on **Back**. You don't need to view the report

(18) Remove Customer Purchases and Payments

This document is typically for the Food Service director, and would be used when purchases and/or payments were recorded on the wrong person's account and need to be removed.

Note: you cannot be selective on what Purchases and/or Payments to remove. Therefore, you would not want to run this utility if some of the purchases truly belong to the person whose account was also used to record someone else's purchases

Note: if you need to remove individual payments from an account, refer to **16b**. If you need to remove individual purchases from an account, contact SIS Team to discuss

1. From the **000** entity, click on the **Food Service** tab
2. On the **Food Service** module, click on **Setup/Utilities**
3. From the **Utilities** menu, select **Remove Customer Purchases and Payments**
4. Search for the Customer by typing (up to) the first 5 letters of the last name and the first 3 letters of the first name. Example for Barbara Kimball: kimbabar
5. **Optional**: click View Purchases to view all purchases that will be removed
   - **Note**: if there are purchases, and you want to print off the details (to add them to the correct customer), click on the Report button. Otherwise, click on **Back**
6. **Optional**: click View Payments to view all payments that will be removed
   - **Note**: if there are payments, and you want to print off the details (to add them to the correct customer), click on the Report button. Otherwise, click on **Back**
7. Click on **Run**
8. When you're prompted if you're sure, click on **Yes**
9. When you get the Audit Report message, click on **OK**

All payments and purchases have now been removed from the selected customer. If needed, you can use the printed reports as reference for adding the transactions to the correct customer

(19) Change Customer Purchase Cafeteria

This document is for Food Service directors and covers how to mass fix purchases recorded on the wrong register/at the wrong building.

Scenario: you have a sub that was logged into the wrong building when they rang up student purchases. Maybe they were serving elementary students but rang them up on the high school register. These students are now showing up in your high school meal counts

Note: you can only move purchases – you cannot move payments. Therefore, all payments made by these students will be reported/shown under the original register on any of the reports you typically run. However, you can run the **(42) Reports by Payor, Customer, School** report to see a total breakdown by school. There's a sample report at the end of this document

Important Note: if you have any hesitation or are not comfortable with doing this on your own, call SIS Team for assistance. If you don't do this exactly right, you can cause a lot of problems

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How to set up the utility:
1. Find out which register the students were actually recorded on, as well as what register they SHOULD have been recorded on
2. From the **000** entity, click on the **Food Service** tab
3. From the **Food Service** module, click on **Setup/Utilities**
4. Click on **Change Customer Purchase Cafeteria**
5. Click on **Add**

Here is my **EXAMPLE** scenario. Use it as a **guide** to set up your own template for your particular situation:
I was mistakenly logged into the ME1 register and served some AlgE students. I should have been logged into the AlgE1 register when I rang them up. I need to move the AlgE student transactions from the ME1 register to the AlgE1 register

6. Give the Template a descriptive name, starting with your initials. **Example**: BK- ME1 to AlgE1
7. Check the box to **Share with other users in entity 000**
8. In both the **Entity High** and **Low fields**, enter the entity number for the correct school. If you don't know the building entity numbers, refer to **(02) District Codes and Utilities** for your district
9. For **Old Cafeteria**, select the line the students were mistakenly rung under
10. For the **New Cafeteria**, select the line the students should have been rung under
11. Change the **Purchase Date** to the date the issue occurred

Template Settings
* Template Description: BK: ME1 to AlgE1
☑ Share with other users in entity 102

Utility Ranges

	Low	High
Entity:	300	300
Customer Key:		ZZZZZZZZZZZ
Grade/Grad Yr:	9999	0000
School:		ZZZZ
Student Status:	Both	
Staff Members:	Include	
Old Cafeteria:	ME1 ▼	Gr. K-1 Line 1
New Cafeteria:	AlgE1 ▼	Gr. 2-6 Line 1
	(Leave New Cafeteria Blank to Use Customer Default Cafeteria)	
* Purchase Date:	10/01/2015 🔲 ?	

12. Click on **Save and Process**
13. When prompted to continue, click on **Yes**
14. Click on **Preview Data to Process**
15. Make sure you see the affected students here
16. Click on **Back**
17. Click on **Run the Update**
18. Click on **OK**
19. Once the report has finished processing, click on **Back**
20. On the My Print Queue screen, click on **Back**

In my example, the students that were mistakenly rung under ME1 now show their transactions under AlgE1

Example of **(42) Reports by Payor, Customer, School**

When the report is sorted by School, you'll see a list of all posted payments, but the bottom of each school will give you a total, as well as a grand total:

```
 ** TOTAL FOR  199   SCHOOL           0.00                  384.00

 ** TOTAL FOR  468   SCHOOL           0.00                  404.60

 **** GRAND  TOTAL  POSTED  PAYMENTS                        855.95
```

(20) Sync Payor Status Audit

This document is for the Food Service director and/or person processing applications. This utility updates the Active/Inactive status for Food Service Customers. If a student exits the district, their FS record may still be active. Running this utility will inactivate any students without an active enrollment record, which helps clean up your Food Service data. It should also be run prior to running the **(22) RESA FS Customer Control vs. Application** Report, which will tell you if there are any Lunch Code discrepancies

1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Setup/Utilities**
3. Click on **Sync Payor Status Audit**

I <u>do</u> have a report template called XX: Inactivate Inactive Customers (where XX is my initials):
4. Highlight the template and click on **Process**
5. If there were no inconsistencies, you'll get a message that No records were found to process and you don't need to do anything more. Otherwise, skip to step 6
6. Click on **Preview Data to Process**
7. You'll see a list of Food Service Customers who are Active in Food Service but Inactive in Enrollment (or Faculty for Staff). Look at the names and see if anyone is in the list that you know shouldn't be. If all looks good, click on **Back**
8. Click on **Run the Update**
9. Click on **OK**
10. When the report has finished processing, click on **Back**. You don't need to view the report
11. Click on **Back** on the My Print Queue screen

I <u>do not</u> have a report template called XX: Inactivate Inactive Customers (where XX is my initials):
4. Click on **Add**
5. Give the template a description of **XX**: **Inactivate Inactive Customers** (where XX is your initials)
6. Check the box to **Share with other users**
7. Click on **Save and Process**
8. If there were no inconsistencies, you'll get a message that No records were found to process and you don't need to do anything more. Otherwise, skip to step 6
9. Click on **Preview Data to Process**
10. You'll see a list of Food Service Customers who are Active in Food Service but Inactive in Enrollment (or Faculty for Staff). Look at the names and see if anyone is in the list that you know shouldn't be. If all looks good, click on **Back**
11. Click on **Run the Update**
12. Click on **OK**
13. When the report has finished processing, click on **Back**. You don't need to view the report
14. Click on **Back** on the My Print Queue screen

(21) RESA FS Application Lunch Code Errors

This document is for the person that processes your district's Free/Reduced meal applications. It provides instruction on running a report in order to see if there are any issues with the data you've entered in any current year applications

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Explanation: after processing a number of Food Service applications, and before the monthly reimbursement claim is submitted, and prior to starting the Verification process, this report should be run to identify where any issues might be in any applications you've processed. These issues can cause your reimbursement numbers to be wrong, as well as cause the Verification results to be reported incorrectly

---

1. From the **000** entity in **Skyward**, click on the **Custom Reports** tab at the top of your screen
2. In the **Custom Reports** module, click on **Reports**
3. Highlight **RESA FS Application Lunch Code Errors** and click on **Run**
4. For the **Export Method**, select **PDF Export Options**
5. Click on **Print**
6. When the request has finished processing, click on **View Report**

Note: depending on what Internet browser and operating system you're using, you'll either be prompted to open the file, the file will automatically open, or it will kind of download to the bottom of the screen, which will require you to click on it. Regardless of the method, you want to open the file in Adobe Reader

The report will provide information on any application with issues. The last page(s) of the report have a legend which explains the issue with each application, based on the referenced error code.

Note: until the 30 day carryover has been run for the 15-16 school year, ignore any **prior year** errors.

Note: for any current year errors, you can (for now) ignore any error 1 codes. These are caused by the Direct Cert process and a ticket has been submitted to Skyward to address

---

Examples of issues:
Note: this is not a current year application – it's just being used as an example

	Status:	Inactive	Case Number:	
Error 13	Lunch Code:	H - Homeless	Household Size:	0
	Application Date:	01/22/2015	Annual Income:	0
	Effective Date:	01/22/2015	App. # / Denied:	__ / No
	Exclude Random Selection:	YES	Exclude Reason:	

This application produces an error code of 13. If you refer to the bottom of the report, this is what it says for **Error 13**: Homeless students are excluded from Verification and need an Exclude Selection Reason. Please edit the application and set Exclude Selection Reason to Homeless Child.

Another example:

Note: again, not a current year application – it's just being used for demonstration purposes:

Error 3			

Status:	Inactive	Case Number:
Lunch Code:	D - DC	Household Size: 0
Application Date:	08/13/2014	Annual Income: 0
Effective Date:	08/13/2014	App. # / Denied: Electronic / No
Exclude Random Selection:	YES	Exclude Reason: Direct Certification

This application produces an error code of 3. If you refer to the bottom of the report, this is what it says for **Error 3:** This is a DC application that was cloned from a DC student. Cloned DC applications must have an Exclude Selection Reason of either SNAP or TANF, based on what the original student had. Please correct application.

All error codes are explained at the bottom of the report. Fix any issues that aren't Error 1 or are not current year applications. Once the 30 day carryover is run, you should no longer see any prior year errors on this report. After all issues have been fixed, re-run the report to make sure you didn't create any new errors with your changes

(22) RESA FS Customer Control vs. Application

This document is for the person that processes the Free/Reduced applications. The report should be run prior to submitting your monthly claim for reimbursement, or after processing a bunch of applications, as it will show any inconsistencies with a customer's Application Lunch Code and their Customer Control Record Lunch Code. While these should be the same, they're not always. Run the report and look for any issues with Lunch Codes.

Note: prior to running this report, run the **(20) Sync Payor Status Audit** utility to correct any inactive students/staff issues that may appear on the report. As a result, there is likely an issue with anyone showing with a discrepancy in the A/I column

1. In Skyward, click on the **Custom Reports** tab at the top of your screen
2. In the **Custom Reports** module, click on **Reports**
3. Highlight **RESA FS Customer Control vs. Application** and click on **Run**
4. For the **Export Method**, select **PDF Export Options**
5. Click on **Print**
6. When the request has finished processing, click on **View Report**

Note: depending on what Internet browser and operating system you're using, you'll either be prompted to open the file, the file will automatically open, or it will kind of download to the bottom of the screen, which will require you to click on it. Regardless of the method, you want to open the file in Adobe Reader

Sample Report:

her	Customer Type	Cust Ctrl / App	Customer Control - Application	Payor / Stud-Staff
atti, Serena M	Active Student	S / P	04/16/2015 - 10/15/2013	A / A
on, Zoe L	Active Student	P / H	04/16/2015 - 01/08/2015	A / A
my	Active Staff	R / S	01/01/1900 - 01/01/1900	A / A
d, Camille N	Current Year Student	P / P	09/02/2014 - 01/01/1900	A / I
alvin J	Current Year Student	P / P	01/01/1900 - 01/01/1900	A / I

The ones you want to look for are where the Cust Ctrl/App Lunch Codes are different. If these are off they'll affect your reimbursement counts. If you encounter any, call SIS Team to discuss until you're comfortable with what to do. You also want to look at the Payor/Stud-Staff column to see if there are any inconsistencies where **students** (denoted by Current Year Student in the Customer Type column) show A/I. When the Payor section shows A, but the Stud-Staff section shows I, it means that this student isn't currently enrolled (which could be a problem with their enrollment record), but that their Food Service record is still active. While this shouldn't affect your counts, it does need to be looked at.

(23) Lunch Code Totals for Purchases by Day

This report would typically be run by the Food Service director. It provides a breakdown, by building and register, of **meal** items purchased by different pay types on a specified date. Typically used when meals are recorded after the fact to make sure the numbers look right. For example: GSRP meals are recorded once a week. You could run this report for the month to make sure your numbers look right for each day. It does not total the meals for the month, so you would run the **(37e) GSRP Report** to filter on GSRP meals to get your monthly F/R/P count of meals served

1. From the **000** entity, click on the **Food Service** tab
2. From within the **Food Service** module, click on **Reports**
3. Click on **Lunch Code Totals for Purchases By Day**

I do have a template called XX: Purchases by Lunch Code (where XX is my initials)
4. Highlight the template and click on **Edit**
5. Change the **Date of Purchase** ranges for the dates you want to report on. This would typically be a day or a month range
6. Click on **Save and Print**

I do not have a template called XX: Purchases by Lunch Code (where XX is my initials)
4. Click on **Add**
5. Give the template a description of **XX: Purchases by Lunch Code** (where XX is my initials)
6. Check the box to **Share with other users in entity**
7. Change the **Date of Purchase** ranges for the dates you want to report on. This would typically be a day or a month range
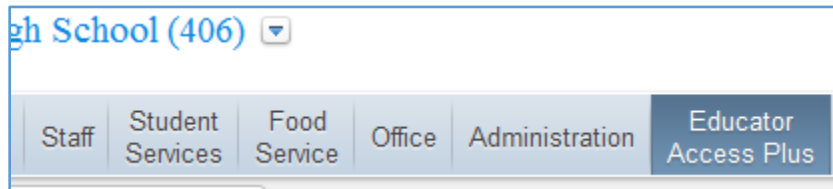8. Click on **Save and Print**

Sample:

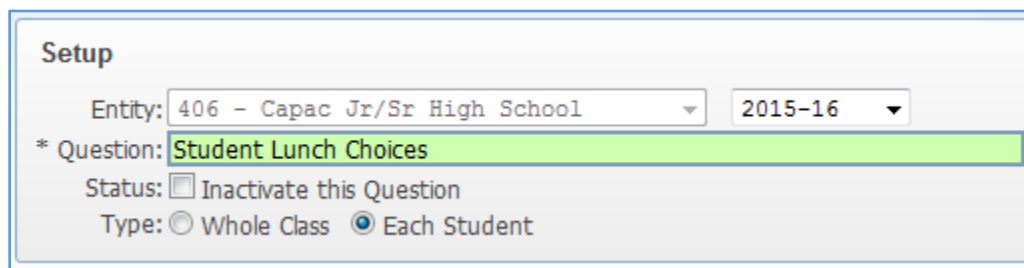| CAFE	DESCRIPTION	SCHL	DATE	ITEM	DESCRIPTION	FREE	REDUCED	NORMAL	ADULT	OTHER	TOTAL
BRE	Belle River	122	03/02/2015	BKF	Breakfast	96	11	18	0	0	125
				CS	Cheese Sandwich	0	0	1	0	0	1
				TAM	Type A Lunch	133	24	49	0	0	206
EE	Eddy	123	03/02/2015	BKF	Breakfast	50	5	23	0	0	78
				SUP	Super	0	1	1	0	0	2
				TAM	Type A Lunch	70	9	65	0	0	144
GE	Gearing	124	03/02/2015	BKF	Breakfast	28	3	10	0	0	41
				CS	Cheese Sandwich	0	0	1	0	0	1
				SUP	Super	2	2	8	0	0	12

(24a) How to Create Lunch Surveys

This document is for the person in your district that has the ability/permissions to create Lunch Surveys. These Surveys are used by the classroom teachers – typically at the elementary level – to record student lunch choices so that the kitchen knows how many of each meal to make. This document provides instruction on setting up the Surveys

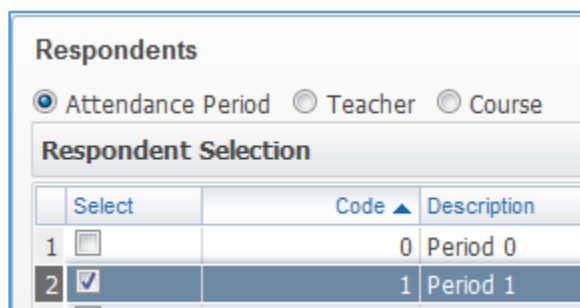1. From within **Web Student Management**, click on the **Educator Access Plus** tab

2. From the **Survey** module, click on **Questions**
3. Click on the **Add** button
4. Enter a **Question**. For example:

5. For the Type option, select **Each Student**
6. Under the **Respondents** section, select **Attendance Period**
7. For **Respondent Selection**, check **Period 1**:

8. From the **Interval** section, select **Specific Dates**
9. For the date ranges, enter the year start and end dates:

Interval

Duration: ○ Grading Period [_____] ▼ - [_____]
○ Specific Dates 09/08/2015 [📅] - 06/15/2016 [📅]
* Days: ☑ Mon ☑ Tue ☑ Wed ☑ Thur ☑ Fri ☐ Sat ☐ Sun

10. Click on **Save**
11. Expand the survey question you just created
12. Click on **Add Answer**
13. Enter one of the lunch option choices. For example: Lunch 1 Choice
14. Click on **Save and Add Another**
15. Enter the next lunch option choice. For example: Lunch 2 Choice
16. Click on **Save and Add Another** if you have more to add, or **Save and Close** if you're done

Teachers can now record student meal choices using **(24b) Lunch Surveys for Teachers**

(24b) Lunch Surveys for Teachers

This documentation is for teachers in districts where they record student meal choices through the Gradebook Survey. It walks through how to record which options students want for lunch. The cafeteria staff can then run a report to see how many of each meal type to make. **This option only exists in districts that have requested to use the survey.**

1. Log into your Gradebook and select your 1st period class

2. From the **Other Access** dropdown menu at the top-left of your screen, select **Survey**
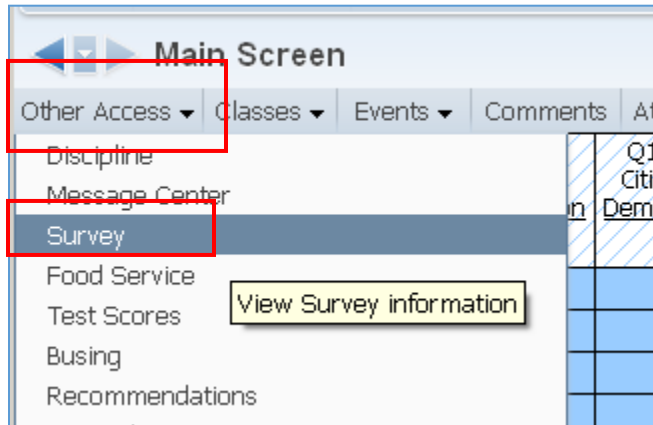
To make selections, you can either serve all students whatever meal choice most kids selected, and then change only those that chose something different, or you can individually select each student's option

To assign everyone a choice and change those it doesn't apply to:
- You might want to use this option when a LARGE percentage of the classroom is making the same choice. That way you only have to change a few individual students

1. From the **Lunch Choice** dropdown menu, select the option that you want to apply to all kids
2. When prompted if you're sure, click on **OK**
3. Change any students that are not getting this option
4. Click on **Save**

To assign each individual student choice:
1. From the Lunch Choice dropdown menu to the right of each student's name, select the option they want
2. Click on **Save**

Once choices have been entered the cafeteria can run a report to get a meal count, as well as to verify students are taking the choice they signed up for

(24c) Reporting Survey Results

This document is for districts that have teachers record, via Gradebook Survey, what meal choice students want. It's only used at elementary schools for this particular purpose. This document is for whoever would be running the report to obtain the survey results on meal counts

Note: this option is only available to districts that have requested to have Surveys set up for Food Service. If you do not currently use this option, but would like to, refer to **(24a) How to Create Lunch Surveys**

1. From the individual entity click on the **Educator Access Plus** tab
2. In the **Survey** module, click on **Reports**
3. Click on the **Survey Response Report**

I do have a report called Today's Lunch Survey:
4. **Highlight** the report, which will always default to today's date, and click on **Print**

I do not have a report called Today's Lunch Survey:
4. Click on **Add**
5. Give the template a description of **Today's Lunch Survey**
6. Check the box to **Share with other users**
7. Click on the button to **Select Questions**
8. Check the option for **Lunch Choices** (or something similar)
9. Click on **Save**
10. For **Date**, select **Current Date**
11. If you want to print the student detail for who selected what options, under the **Options for Each Student** section, for **Print Options**, select **Detail,** otherwise, leave it as Summary if you just want a meal choice count
12. If you want the report to be sorted by Teacher, select the **Sort Option** for **By Teacher**
13. Check the box for **All Attendance Periods**
14. Click on **Save and Print**

If you selected to print student choice details, the report can be used in the lunch line to verify students took what they signed up for

(25a) Payor/Customer Meal Statements – FS Director

This document is for whoever needs to print a student's meal history and has access to Food Service Customers. The report itself provides the detail of a student's payments/purchases. It's typically given to parents who are questioning a student's account

Note: the way FS directors would run this report is different from the cashiers (or others with limited access to Food Service). Cashier instructions (or for anyone else that doesn't have access to Food Service Customers) are found in document **25b**

1. From the **000** entity, click on the **Food Service** tab
2. In the **Payor/Customer Maintenance** module, click on **Customers**
3. **Search** for the student that you're printing a statement for
4. With the name highlighted, click on the **Quick Print** button to the right
5. For the **Report** options, select **Customer Meal Statements** (if given different options)
6. From the **Template** dropdown menu, select **All Payor/Customer Meal Statements**
7. Click on **Run**

Note: these reports can be saved and emailed to a parent – they don't have to be printed and/or mailed

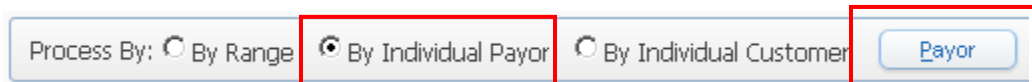## (25b) Payor/Customer Meal Statements – Cashiers

This document is for whoever needs to print a student's meal history and does not have access to Food Service Customers. The report itself provides the detail of a student's payments/purchases. It's typically given to parents who are questioning a student's account

Note: the way cashiers (or others with limited access to Food Service) would run this report is different from what FS directors would do. Director instructions (or anyone else that has access to Food Service Customers) are found in document **25a**

1. From your individual entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Reports**
3. From the **Reports** menu, click on **Payor/Customer Meal Statements**

I do have a template called XX: Individual Meal Statements (where XX is my initials):
4. Highlight the template and click on **Edit**
5. In the **Process By**: section, you should have either **By Individual Payor** or **By Individual Customer** selected. You'll have the corresponding button for whichever option is chosen. Click on the button (Payor, in this example):

6. Click on the button to **UnSelect All Payors**
7. Search for the student that you need to print the history for
8. Check the box to the left of the customer's name
9. Click on **Save**
10. Click on **Save and Print**

I do not have a template called XX: Individual Meal Statements (where XX is my initials):
4. Click on **Add**
5. Give the template a description of **XX: Individual Meal Statements** (where xx is your initials)
6. Check the box to **Share with other users**
7. In the **Process By** section, select the option for **By Individual Customer**
8. Click the **Customer** button
9. Search for the student that you need to print the history for
10. **Check** the box to the left of the customer's name
11. Click on **Save**
12. From the **Print Only If** dropdown menu, select **Any Customer is within range**
13. From the **Salutation** dropdown menu, select **'To the Guardian of'**
14. Click on **Save and Print**

(26) Teacher Payor Balance List

This document is typically for the Food Service director and would be used when student balances are given to the classroom teacher

Note: prior to running this report, you'll want to **(50a) Update Batch Utilities**

Note: this document assumes that you have Homerooms set up and assigned, otherwise you can't print the report by Homeroom

1. From the **000** entity, click on the **Food Service** tab
2. Under the **Food Service** module, click on **Reports**
3. From the **Reports** menu, click on **Teacher Payor Balance List**

I do have a template called XX: Balances by Teacher (where XX is my initials)
4. **Highlight** the template and click on the **Print** button
5. When the report has finished processing, click on **View**

I do not have a template called XX: Balances by Teacher (where XX is my initials)
4. Click on the **Add** button
5. Give the template a description of **XX: Balances by Teacher** (where XX is your initials)
   - If you're going to create separate reports for different buildings, put the entity name or number in your template description
6. If you're printing this for a particular building, enter the appropriate **Entity** Low and High values
   - If you don't know your entity numbers, refer to **(02) District Codes and Utilities** for your district
7. **Balance**: the system will default the report to include all positive and negative balances. If you only want negative balances, enter a High value of -.01
8. Set **Student Status** to **Active**
9. Click on the **Sort Order/Page Break** button
10. From the **Sort Order** section, check the box for **Homeroom**
11. From the **Page Break** section, check the box for **Homeroom**
12. Click on **Ok**
13. Click on **Save and Print**
14. When the report has finished processing, click on **View**

(27) Update Prior Balance Utility

This document is typically for the FS director. This utility allows you to do either of the following:
- **Move Prior Balances to Active Siblings**: can be run by individual or en masse for any Inactive accounts with the specified account balance. You can move both positive and negative balances this way
  - o **Note**: you would not want to run this option en masse. An explanation is given later in this document
- **Zero Out Prior Balances**: can be run by individual or en masse for any active or inactive students in order to change any Prior Year Balances to Zero

Explanation: in July, when the RESA runs the year-end rollover process, all account transactions are deleted. So, going forward, you won't be able to see a history of purchases and payments. However, whatever the current account balance is at the time the year-end is run, is moved forward and put into a section called Prior Year Balances. These balances could be positive, negative or zero amounts.

When you might use this utility:
- To Zero out negative balances due to bad debt not being able to be carried over from one year to the next
- If a parent is asking that money be transferred from one exited sibling to other active siblings.
  - o **Note**: when this option is selected, you can either run it for an individual Inactive student or for all Inactive students. When the process runs, you can't specify which siblings the balance is going to, nor can you specify an amount to go to each. The system will select any students listed as siblings and distribute the money evenly. One problem with running this en masse is that not all sibling records are correct and students will be getting money that shouldn't. This should only be run for an individual student

Because of the ramifications of selecting incorrect options here, call the RESA for assistance if you think you might want to run this utility for any reason

(28) Free and Reduced Rosters with Grades and Buildings

This document would be for whoever needs to obtain a list of lunch codes, broken down by grade level and building, and provides instruction on creating the report. If you just want totals, or don't need a breakdown by grade, you can run the **(33) Lunch Code Totals by Day Report**. If you need a grade breakdown, but not building, you can run the **(31) Lunch Codes with Grade Levels Report**

There are multiple ways to obtain this information, the easiest of which is to create a filter in Food Service Payors and export the report to Excel. It can then be sorted to your need

1. Click on the **Food Service** tab
2. From the **Payor/Customer Maintenance** module, click on **Payors**
3. From the **Views** dropdown menu, select **Customers**
4. To the right of the Views dropdown menu, click on the word **Filters**
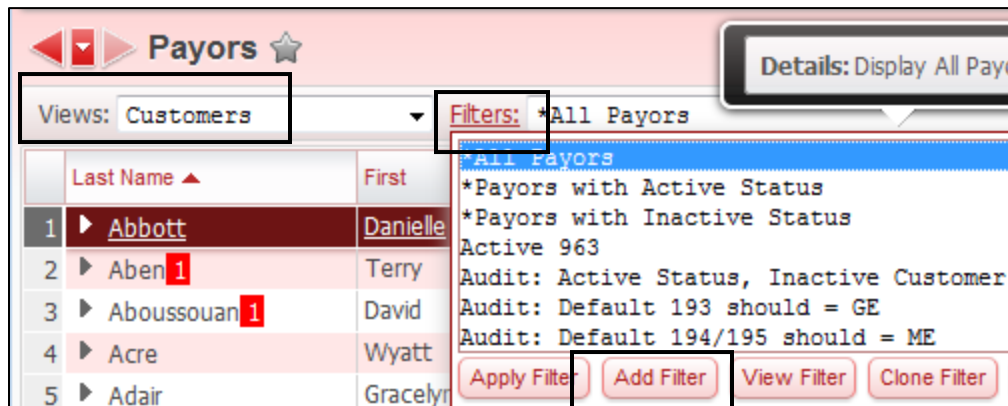
I do see a filter called XX: Free and Reduced with Grade and Building (where XX is my initials)
5. Highlight the filter and click on **Apply Filter**
6. If you want to export the report to Excel: In the upper right-hand corner of the Customer screen, click on the **Excel** icon

7. Click on **Export**
8. If prompted, click on **Download Exported File**
9. **Open** the file
10. If you get the message that the file format doesn't match, click on **Yes**
11. You can now sort the file in any way you need to, you can print it out, and/or you can save it to your hard drive

I do not see a filter called XX: Free and Reduced with Grade and Building (where XX is my initials)

5. Click on **Add Filter**

Note: you have two options here: you can create 1 report that includes all free, reduced and paid students. If you export it to excel, you can then remove the Paid students. Or, you can create 2 different reports – 1 for free and 1 for reduced. In this example, I'm creating 1 report. If you create 2, adjust the Filter Name accordingly
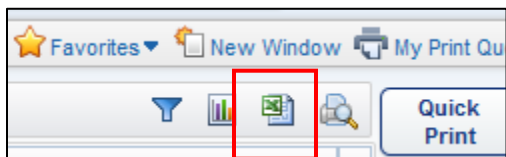
6. Give the Filter a name of **XX: Free and Reduced with Grade and Building** (where XX is your initials)
7. For the rows shown, **uncheck** the **S** display checkbox
8. For the **S** row, enter an **a** for both the **Low Value** and the **High Value**
9. For the **LC (1) Low Value,** enter a **d**. For the **High Value**, enter an **r**

Note: if you're creating 2 separate reports, the free one will have a LC (1) Low Value of D and a High Value of O. The reduced report would have an R for both the LC (1) Low and High Values

10. Other than the rows shown below, uncheck all other options

Note: what you see below is not in the same order as what you'll see. I just rearranged the order to get the needed fields all in one screenshot

Move	Label	Display	Width	Low Value	High Value	
	Last Name	✓	100%		ZZZZZZZZZZZZZZZZZZZZZ	
✛	First	✓	100%		ZZZZZZZZZZZZZZZZZZZZZ	
✛	DE (1)	✓	100%		ZZZZZZZZZZZZZZZZZZZZZ	
✛	S	☐	100%	a	a	Reset
✛	LC (1)	✓	100%	d	r	Reset
✛	Gr (1)	✓	100%		ZZZZZZZZZZZZZZZZZZZZZ	

11. If you want/need to report on a particular grade level or range, enter the Low and High Gr (1) values. For example, if you only want 5th grade, it would look like this:

✛	Gr (1)	✓	100%	05	05

If you wanted to see grades 5 – 10, it would look like this:

✛	Gr (1)	✓	100%	05	10

12. If you want/need to report on a specific building, enter the entity number in the DE (1) Low and High Values. If you want to report on all buildings and then filter out what you don't need from within Excel, don't enter anything in the Gr (1) rows

Note: the grade level for Kindergarten is KG

13. In the upper right-hand corner, click on **Save and Apply Filter**

14. If you want to export the report to Excel: In the upper right-hand corner of the Customer screen, click on the **Excel** icon
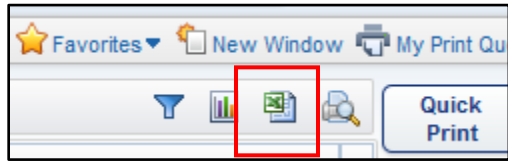
15. Click on **Export**
16. If prompted, click on **Download Exported File**
17. **Open** the file
18. If you get the message that the file format doesn't match, click on **Yes**

You can now sort the file in any way you need to, you can print it out, and/or you can save it to your hard drive
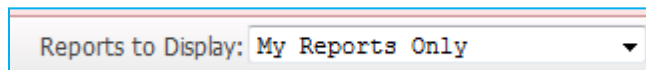
(29) AR Review Benefit Issuance List

This report would be used by the person producing information for the Food Service auditor during the AR review. It includes: student name, grade, school, lunch code, effective date and eligibility method. The eligibility method tells if the student is eligible due to an application being submitted, being direct certified or categorically eligible. This can be determined by the associated lunch code

Note: prior to running this report, you'll want to run the **(22) RESA FS Customer Control vs. Application** report to clear up any potential mismatches between the application lunch codes and the customer control record lunch codes

These are the lunch codes and what they mean:
D: Directly Certified = Categorically Eligible/Direct Cert
F: Free, Income Eligible = Application
G: Food Stamp = Categorically Eligible/Application
H: Homeless = Categorically Eligible/McKinney Vento form
O: Foster = Categorically Eligible/Application
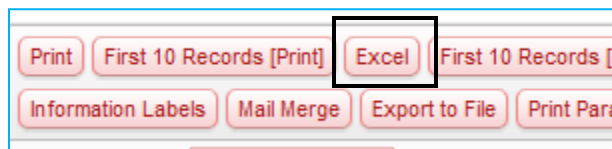**R**: Reduced = Application
P: Paid

1. From the **000** entity, click on the **Students** tab
2. From the **Students** module, click on **Data Mining**
3. From the **Reports to Display** dropdown menu, select **My Reports Only:**

Reports to Display: My Reports Only ▾

I do see a report called XX: AR Benefits Issuance List (where XX is my initials)
4. Highlight the report and click on **Edit**
5. On the left-hand side of the screen, click on **Ranges**
6. On the right-hand side of the screen, click on the **Edit Ranges** button
7. Scroll down to the **Effective Date** section
8. Set the **Range Low** date to **07/01/xx** (where xx is the current year)
9. Click on **Save**
10. Click on the **Excel button:**

Print | First 10 Records [Print] | Excel | First 10 Records [
Information Labels | Mail Merge | Export to File | Print Para

11. When prompted for the Food Service password, enter the first initial and last name of your Food Service director – only up to 8 characters, and all lower case
12. Click on **OK**
13. Once the report has finished generating, click on **View Report**

14. If prompted, select to **Open with Excel**
15. Click on **Yes** to the message that the file format and extension don't match
You can now sort the report in any way you might need to

I do not see a report called XX: AR Benefits Issuance List (where XX is my initials)

4. On the right-hand side of the screen, click on the **Add** button
5. Give the **Report** a **Name** of **XX: AR Benefits Issuance List** (where XX is your initials)
6. Press the **Tab** key on your keyboard, which will then populate the Report Title with your Report Name:

7. On the right-hand side of the screen, click on **Save and Add Fields**
8. From the **Field** Areas, click on **General**
9. From the **General** section, click on **Profile**
10. From the **Profile** section, click on **Name**
11. From the **Name** section, double click on **Student Full Name**:

12. From the **Profile** section, double click on **Grade**

13. From the **Field Areas** section, click on **Entity**
14. From the **Entity** section, double click on **Entity Name**

15. From the **Field Areas** section, click on **Food Service**
16. From the **Food Service** section, double click on **Current Lunch Code**

17. From the **Food Service** section, double click on Application Nbr

18. From the **Food Service** section, click on **Control**
19. From the **Control** section, double click on **Effective Date**

20. Double click on **As of Date**
21. Click on **Save and Modify Ranges**
22. In the **Current Lunch Code** section, click on the box for **Individual Selections**
23. Click on the **Select** button
24. Check the boxes for everything except P, S and V
25. Click on **Save**

Current Lunch Code (Food Svc)

☑ Print Field on Report ☑ Individual Selections

Select | D=DC
F=Free
G=FS

26. Scroll down to the **Effective Date** section
27. Set the **Range Low** date to **7/1/xx** (where xx is the current year)

Effective Date (FS Control)

☑ Print Field on Report ☐ Individual Selections

Range Low: ◉ Fixed 07/01/2015   Range High: ◉ Fixed 12/31/9999

28. In the **As of** Date ranges, enter today's date in both the As of and **thru** fields
29. For **Classified As Of**, select **Yes**

As of Date (FS Control)

☑ Print Field on Report   Classified As Of: ◉ Yes ○ No

As of: 07/14/2016   thru: 07/14/2016

30. Click on **Save**
31. Click on the **Excel button:**

Print | First 10 Records [Print] | Excel | First 10 Records [
Information Labels | Mail Merge | Export to File | Print Para

32. When prompted for the Food Service password, enter the first initial and last name of your Food Service director – only up to 8 characters, and all lower case
33. Click on **OK**
34. Once the report has finished generating, click on **View Report**
35. If prompted, select to **Open with Excel**

36. Click on **Yes** to the message that the file format and extension don't match

You can now sort the report in any way you might need to

(30) Grandparent Meals – Creating, Serving and Reporting
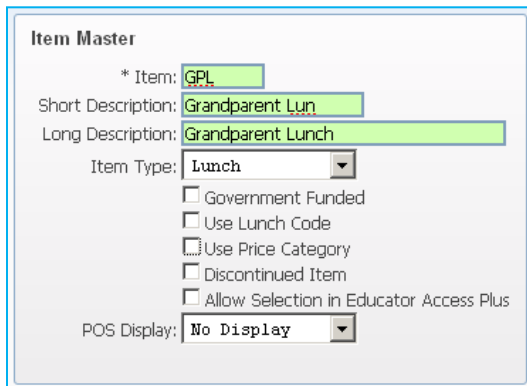
This document is for Food Service directors in districts where they have grandparent volunteers and these volunteers receive a free lunch. It shows how to create the item in the Item Master, how to ring up the transactions, and how to run a report on the number of grandparent meals served in a month

Create the Grandparent Meal in the Item Master:
Note: you don't want to create this item while breakfast or lunch are being served
Note: you'll need to run the **(50) FS Alerts – Batch Updates** before creating the item
1. From the **000** entity, click on the **Food Service** tab
2. From the **Purchases** module, click on **Item Master**
3. Click on the **Add** button in the upper right-hand corner of the screen
4. Enter these options:

5. Click on **Save and Update First Detail Record**
6. From the **Report Group** dropdown menu, select **Adult Lunch**
7. Click on **Save**
8. On the right-hand side of the screen, click on the **Touch Screen** button
9. Highlight the **Cafeteria** line you want to add the item to and click on **Edit**
10. Click on **Select/Sort Items**
11. **Check** the box for the Grandparent Lunch and click on OK
12. Click on **Save**
13. Click on **Back**

Record the meals in the POS:
Note: it's assumed that the grandparents don't have their own Food Service accounts and that the Visitor account will be used
1. From within the POS, bring up the Visitor account for your building
2. Serve the Grandparent item
Note: this is set up as a zero cost item

Report the meals:
To report the meals, run the **(34) RESA FS Monthly Summary Report**, which will give you the total by building

Daily Food Purchased

	Total
GPL Grandparent Lun	1 0.00
Total	1 0.00

(31) Lunch Codes with Grade Levels

This document would be for whoever needed to obtain a list of lunch codes, broken down by grade level, and provides instruction on creating the report. If you just want totals, or don't need a breakdown by grade, you can run the **(33) Lunch Code Totals by Day Report**

There are multiple ways to obtain this information, the easiest of which is to create a filter in Food Service Customers and export the report to Excel. It can then be sorted to your need

1. Click on the **Food Service** tab
2. From the **Payor/Customer Maintenance** module, click on **Customers**
3. From the **Views** dropdown menu, select **Customer Information**
4. To the right of the Views dropdown menu, click on the word **Filters**
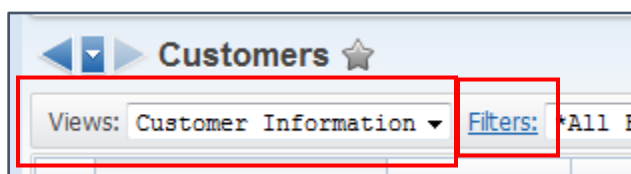
From the Filters menu, I <u>do</u> see a template called XX: Active Students w/ Grades (where XX is my initials)

5. Highlight the template and click on **Apply Filter**
6. In the upper right-hand corner of the screen, click on the **Excel** icon
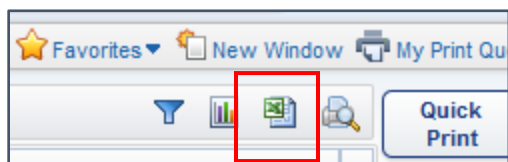
7. Click on **Export**
8. If prompted, click on **Download Exported File**
9. **Open** the file
10. If you get the message that the file format doesn't match, click on **Yes**
11. You can now sort the file in any way you need to, you can print it out, and/or you can save it to your hard drive

From the Filters menu, I <u>do not</u> see a template called XX: Active Students w/ Grades (where XX is my initials)

5. Click on **Add Filter**
6. Give it a **Filter Name** of **XX: Active Students w/ Grades** (where XX is your initials)
7. In the Column Display Options and Filters section, modify your options to look like this:

Note: you'll see other options than what is shown above. I just reordered them to get them all together, which you don't need to do

8. **S**: **Uncheck** the Display checkbox
9. **S**: **Low Value** – enter an **a**
10. **S**: **High Value** – enter an **a**
11. **LC**: **Low Value** – enter a **b**
12. **LC**: **High Value** – enter an **r**
13. **Uncheck** everything else that is not shown on this screen
14. In the upper right-hand corner, click on **Save and Apply Filter**
15. In the upper right-hand corner of the Customer screen, click on the **Excel** icon
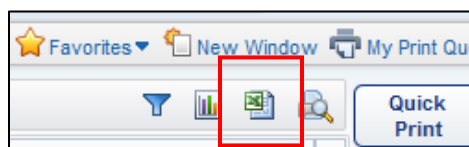
16. Click on **Export**
17. If prompted, click on **Download Exported File**
18. **Open** the file
19. If you get the message that the file format doesn't match, click on **Yes**
20. You can now sort the file in any way you need to, you can print it out, and/or you can save it to your hard drive

Note: you can also create individual filters for each grade level. If you choose to do this, include the grade-level in your Filter Name and include this in your options:

Column Display Options and Filters

Move	Label	Display	Width	Low Value		High Value
	Last Name	✓	100%			ZZZZZZZZZZZZ
✛	First	✓	100%			ZZZZZZZZZZZZ
✛	S	☐	100%	a		a
✛	Gr	✓	100%	05		05
✛	LC	✓	100%	d		r

Note: the grade for **Kindergarten** is **KG**

(32) Reports to Run to Obtain Monthly Reimbursement Information

This document is for Food Service directors and/or person submitting monthly reimbursement claim, and covers how to most easily obtain the needed information in order to submit your monthly reimbursement claim. Only 2 reports need to be run to get all the needed information

Reimbursement Claim: this is a screenshot of the reimbursement section on the MEIS website.

Meal Type	Total Servings	Total Paid	Total Free	Total Reduced	Days Served	Number of Eligible Students		Student Enrollment
						Free	Reduced Price	
Breakfast	0	0	0	0	0	0	0	0
Lunch	0	0	0	0	0			

This is how to most easily obtain the information needed here:

➢ **Total Servings/Total Paid/Total Free/Total Reduced:** get this information from the **(34a) RESA FS Monthly Summary Report**

It's found on the last page for each individual building:

District Total - Reimbursable Meals   April 2016

	Student Free	Student Full-Pay	Student Reduced	Total
Breakfast	1,414	586	104	2,104
Lunch	1,147	326	83	1,556

➢ **Days Served**: this information is also found in the **(34a) RESA FS Monthly Summary** report, on the same page as the Reimbursable Meals section

April 2016

Operating Days

Breakfast	16
Lunch	16

➢ **Free/Reduced Price Eligible Students**: this information can be found by running the **(33) Lunch Code Totals by Day Report**: just run it, by building, for the last operating day of the month:

Sample Report:

TOTAL LUNCHES:	D	DC	90
	F	Free	19
	G	FS	5
	H	Homeless	1
	P	Paid	88
	R	Reduced	20

While the information from **(35) RESA FS Reimbursement Summary by School** isn't needed for your claim, you can run it to verify your reimbursement amount from the government

Sample Report:

	Student Free			Student Full-Pay			Student Reduced			Total	
	Served	Rate	Amount	Served	Rate	Amount	Served	Rate	Amount	Served	Amount
Breakfast - SNB	528	1.990	1,050.72	318	0.290	92.22	86	1.690	145.34	932	1,288.28
Lunch - NSL	482	3.300	1,590.60	146	0.430	62.78	67	2.900	194.30	695	1,847.68
195 - Meyer Elementary	1,010		2641.32	464		155.00	153		339.64	1,627	3135.96

(33) Lunch Code Totals by Day

This document shows how to get a Free/Reduced/Paid student count on any specified date. It's often used by many different staff members to determine if students qualify for reduced/free sports and/or testing. It can also be used to obtain the eligibility counts for your monthly reimbursement claim

This report provides a lunch code breakdown by entity, based on a selected date

1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Reports**
3. Click on **Lunch Code Totals by Day**

I do have a template called XX: F/R Roster – w/o names (where XX is my initials)
I do have a template called XX: F/R Roster – w/ names (where XX is my initials)

4. Highlight the appropriate template, depending on whether or not you want to include student names
5. Click on **Edit**
6. Change the **Date** for which you want to print the report. If you're running this for your monthly eligibility, use the last operating day of the month
7. Click on **Save and Print**

Sample:

```
1fsrpt46.p 02-2                         East China School Dis
05.15.02.00.00                       Lunch Code Totals For 04


  ------CAFETERIA-------   ----LUNCH CODE-----
 ID      DESCRIPTION       ID   DESCRIPTION      # OF CUSTOMERS   CAFE TOTAL

 BRE     Belle River       D    DC                    148

                           F    Free                   28

                           G    FS                      7

                           H    Homeless                3

                           P    Paid                  189

                           R    Reduced                41           416


 EE      Eddy              D    DC                     86

                           F    Free                   14
```

I do not have a template called XX: F/R Roster – w/o names (where XX is my initials)
I do not have a template called XX: F/R Roster – w/ names (where XX is my initials)

4. Click on **Add**
5. Give the template a description of **XX: F/R Roster – w/o names** (where XX is your initials)
6. Check the box to **Share with other users in entity**
7. **Accumulate Totals for Date**: enter the date for which you want to get Free/Reduced counts. If you're running this for your monthly eligibility, use the last operating day of the month

8. **Uncheck** All Lunch Codes
9. Click on the **Lunch Codes** button
10. Check everything except Staff and Visitor
11. Click on **Save**
12. Click on **Save and Print**

To create a template that includes names:
1. Highlight your existing template w/o names and click on **Clone**
2. Give the template a description of **XX: F/R Roster – w/ names** (where XX is my initials)
3. Check the box to **Print Customer Name**
4. Click on **Save and Print**

(34a) RESA FS Monthly Summary Report

This document is for the FS Director and/or the person submitting the monthly reimbursement claim. This is a RESA created report that's used in place of some of Skyward's reports. This particular one can be used in place of the Skyward Accuclaim report. It's similar to Zangle's Monthly Food Service Summary and is found on the **Custom Reports tab/Reports/RESA FS Monthly Summary.** It should be run with Details on, and saved to your network drive every month. This is the information you'll possibly need for future audits.

Note: before being able to complete these steps, the Crystal Report Viewer software needs to be installed on your computer. If you don't have the ability to install software on your computer, contact your IT department and give them the instructions on **(34c) Installing Crystal Viewer**

1. From the **000** entity, click on the **Custom Reports** tab at the top of your screen
2. In the **Custom Reports** module, click on **Reports**
3. Highlight **RESA FS Monthly Food Service Summary** and click on **Run**
4. From the **Export Method** dropdown, select **RPT Export Options**
5. Select the **Report Month** that you want to run the report for
6. Click on **Print**
7. When the report has finished processing, click on **View Report**
8. If prompted with what to open the file with, the option should be **Crystal Report Viewer**. Click on **OK**
9. You'll get an error about a later version. Click on **OK**

By default, every time you run this report, you're going to see a detail section for Payments made, a detail section for Purchases made, and a Summary section for each individual building. The report, with this level of detail, can be hundreds of pages long. In order to just see the Summary sections:

10. In the upper left-hand corner, click on **View/Show or Hide Sections**

11. Click on **Group Header #2** and check the option to **Hide (Drill-Down OK)**

12. Do the same for **Group Header #3** and **Details**
13. Click on **OK**

On the left-hand side of the screen, you'll see a menu with all of your buildings listed:
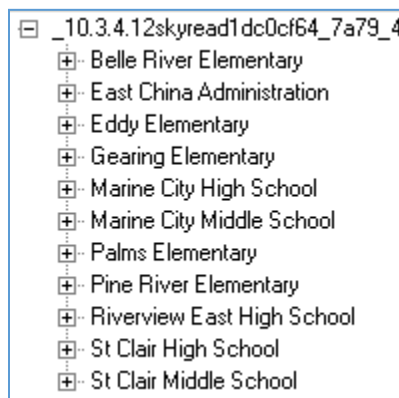
You can click on any of these links to take you to the particular page that building is on. Otherwise, you can use the VCR buttons in the upper right-hand corner to navigate from one page to the next
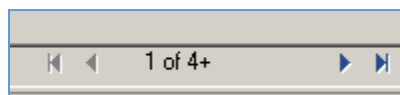
If you click on the **Printer** icon, you'll have the option to print All pages, the current page only, or a specified range of pages. Typically, the district totals will be on the 2nd to last page

If you look at the report prior to hiding the details, you'll see a separate section for each building, broken down by details of all Payments recorded from that building, details of all Purchases recorded

from that building, as well as a Summary section at the end of each building section. The last pages have district totals. Explanation of report areas:

Food Payment Summary:

District Total - Food Payment Summary	January 2015			
	CASH/OTHER	CHECK	VIA WEB	Total
Quantity	4,012	873	437	5,322
Total	24,249.16	23,151.17	11,842.30	59,242.63

4,102: total number of cash transactions recorded district-wide for the month of January
$24,249.16: the dollar amount of all cash payments
873: the number of check transactions recorded district-wide for the month of January
$23,151.17: the dollar amount of all check payments
437: the number of online payments made by parents
$11,842.30: the dollar amount of payments made by parents
5,322: the total number of payments recorded district-wide for the month of January
$59,242.63: the dollar amount of all payments recorded for the month of January

Food Purchase Summary: this section shows the total amount of payments made, the total amount of purchases made, as well as the difference.

District Total - Food Purchase Summary	January 2015
Total Payments	59,242.63
Total Purchases	55,915.40
Difference	3,327.23

Menu-Types/Benefit:

District Total - Menu Types / Benefit	Adult	Student Free	Student Full-Pay	Student Reduced	Student Ala Carte	Other	Total
ALA Carte	202	0	0	0	17,226	0	17,428
	364.15	0.00	0.00	0.00	16,614.75	0.00	16,978.90
Breakfast	9	6,353	2,384	822	0	0	9,568
	18.00	1.25	2,776.25	234.35	0.00	0.00	3,029.85
Lunch	251	12,303	14,203	2,689	0	0	29,446
	871.30	111.50	33,850.75	1,070.10	0.00	0.00	35,903.65
Other	0	0	0	0	0	1	1
	0.00	0.00	0.00	0.00	0.00	3.00	3.00
Total	462	18,656	16,587	3,511	17,226	1	56,443
	1,253.45	112.75	36,627.00	1,304.45	16,614.75	3.00	55,915.40

Adult column: this shows the number of items, as well as the dollar amount of all adult purchases

Student Free/Full-Pay and Reduced columns: this shows the number of meals only, along with the dollar amount, of all student purchases

Student ala Carte column: this shows the number of ala Carte items, as well as the dollar amount, purchased by students only

Other: if you have anything in your Item Master set up as an Item Type of Other, it will appear in this column.

Total: combines all totals for a given row

Note: you would not use these numbers for your reimbursement claim, as it reports a total of ALL meals served, even second meals

Reimbursable Meals: these are the numbers you would use for your reimbursement claim (also found on **(35) RESA FS Reimbursement Summary by School**)

District Total - Reimbursable Meals | January 2015

	Adult	Student Free	Student Full-Pay	Student Reduced	Total
Breakfast	0	6,352	2,383	821	9,556
Lunch	3	12,263	14,122	2,684	29,072

Note: if you see an Adult column in the Reimb Meals section, something is wrong with a student's account, which is causing them to show up as an Adult. It's usually due to an inactive student being served. Call SIS Team to troubleshoot

Non-Reimbursable Meals: this section shows all Adult meal purchases, as well as 2nd meals served to students. If this seems like an unusually high number for students, look at the summary sections of the elementary schools and see if students were mistakenly served 2nd meals at some point during the month. If so, see **(39) 2nd Meals Served** for instructions on removing 2nd elementary meals

Non-Reimbursable Meals | January 2015

	Adult	Student Free	Student Full-Pay	Student Reduced	Total
Breakfast	9	1	1	1	12
Lunch	248	40	81	5	374

Note: these numbers, when combined with the Reimbursable Meals section, add up to the Menu Types/Benefits section totals

Food Purchased: this section shows the number of each item sold, along with the dollar amount for the sales

District Total - Food Purchased	
January 2015	**Total**
60C	3,043
$.50 Cookie	1,521.50
ASN	23
Specialty Sand	80.50
ASP	43
Specialty Salad	172.00
BC	3,491
Bottle/Can Bev.	5,236.50
BCH	2,568
$.75 Chips	1,926.00
BK	417
BK GSRP	0.00
BKF	9,151
Breakfast	3,029.85
BSU	99
Breakfast	123.75
CM	37
$.95 Chex Mix	35.15
CNSB	3,225
Crust N Stuff/B	3,735.35

Operating Days: on the Summary page for each building, the number of operating days for both breakfast and lunch is shown

June 2016	
Operating Days	
Breakfast	12
Lunch	12

Student Grades: student grade levels have been added to both the RESA Daily and Monthly FS Summary reports. This allows you to filter the report for specific grade levels, which can help identify where students were served the wrong meal

Mallory J	5	MS1
		MS2
		MS3
		MS1

(34b) RESA FS Daily Summary Report

This document is for the FS director. This is a RESA created report that's used in place of some of Skyward's reports. This particular one replaces the Skyward Accuclaim report. It's similar to Zangle's Daily Food Service Summary and is found on the **Custom Reports tab/Reports/RESA FS Daily Summary**

1. From the **000** entity, click on the **Custom Reports** tab at the top of your screen
2. In the **Custom Reports** module, click on **Reports**
3. Highlight **RESA FS Daily Food Service Summary** and click on **Run**
4. From the **Export Method** dropdown, select **PDF Export Options**
5. For the **Report Date**, enter the date that you want to run the report for
6. Click on **Print**
7. When the report has finished processing, click on **View Report**
8. If prompted with what to open the file with, the option should be **Adobe Reader**. Click on **OK**

On the left-hand side of the screen, you'll see a menu with all of your buildings listed:

```
⊟ _10.3.4.12skyread1dc0cf64_7a79_4
  ⊞ Belle River Elementary
  ⊞ East China Administration
  ⊞ Eddy Elementary
  ⊞ Gearing Elementary
  ⊞ Marine City High School
  ⊞ Marine City Middle School
  ⊞ Palms Elementary
  ⊞ Pine River Elementary
  ⊞ Riverview East High School
  ⊞ St Clair High School
  ⊞ St Clair Middle School
```
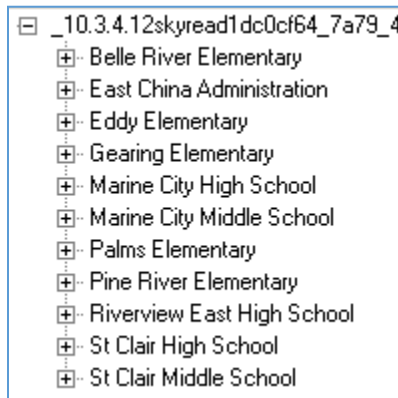
You can click on any of these links to take you to the particular page that building is on

Explanation of the Report Areas:

Food Payment Summary:

District Total - Food Payment Summary	January 2015		
	CASH/OTHER	CHECK	VIA WEB	Total
Quantity	4,012	873	437	5,322
Total	24,249.16	23,151.17	11,842.30	59,242.63

4,102: total number of cash transactions recorded district-wide for the month of January
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437: the number of online payments made by parents
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Food Purchase Summary: this section shows the total amount of payments made, the total amount of purchases made, as well as the difference.

District Total : Food Purchase Summary	
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Menu-Types/Benefit:

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	871.30	111.50	33,850.75	1,070.10	0.00	0.00	35,903.65
Other	0	0	0	0	0	1	1
	0.00	0.00	0.00	0.00	0.00	3.00	3.00
Total	462	18,656	16,587	3,511	17,226	1	56,443
	1,253.45	112.75	36,627.00	1,304.45	16,614.75	3.00	55,915.40

Adult column: this shows the number of items, as well as the dollar amount of all adult purchases
Student Free/Full-Pay and Reduced columns: this shows the number of meals only, along with the dollar amount, of all student purchases
Student ala Carte column: this shows the number of ala Carte items, as well as the dollar amount, purchased by students only
Other: if you have anything in your Item Master set up as an Item Type of Other, it will appear in this column.
Total: combines all totals for a given row

Note: you would not use these numbers for your reimbursement claim, as it reports a total of ALL meals served, even second meals

Reimbursable Meals: these are the numbers you would use for your reimbursement claim (also found on **(35) RESA FS Reimbursement Summary by School**)

District Total - Reimbursable Meals January	Adult	Student Free	Student Full-Pay	Student Reduced	Total
Breakfast	0	6,352	2,383	821	9,556
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Note: if you see an Adult column in the Reimb Meals section, something is wrong with a student's account, which is causing them to show up as an Adult. Call SIS Team to troubleshoot

Non-Reimbursable Meals: this section shows all Adult meal purchases, as well as 2nd meals served to students. If this seems like an unusually high number for students, look at the summary sections of the elementary schools and see if students were mistakenly served 2nd meals. If so, see **(39) 2nd Meals Served** for instructions on removing 2nd elementary meals

Non-Reimbursable Meals Janu	Adult	Student Free	Student Full-Pay	Student Reduced	Total
Breakfast	9	1	1	1	12
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Note: these numbers, when combined with the Reimbursable Meals section, add up to the Menu Types/Benefits section totals

Food Purchased: this section shows the number of each item sold, along with the dollar amount for the sales

District Total - Food Purchased January 2015	Total
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$.50 Cookie	1,521.50
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Specialty Sand	80.50
ASP	43
Specialty Salad	172.00
BC	3,491
Bottle/Can Bev.	5,236.50
BCH	2,568
$.75 Chips	1,926.00
BK	417
BK GSRP	0.00
BKF	9,151
Breakfast	3,029.85
BSU	99
Breakfast	123.75
CM	37
$.95 Chex Mix	35.15
CNSB	3,225
Crust N Stuff/B	3,735.35

Student Grades: student grade levels have been added to both the RESA Daily and Monthly FS Summary reports. This allows you to filter the report for specific grade levels, which can help identify where students were served the wrong meal

Mallory J	5	MS1
		MS2
		MS3
		MS1

(34c) Installing Crystal Reports Viewer in Order to Run Custom Reports

This documentation is intended for anyone that can install applications on a computer. If you're in deep freeze and unable to install applications on your computer, your IT person would need to install this

In order to be able to run some of the RESA-created reports, the Crystal Reports Viewer must be installed on anyone's computer that needs to run these reports. They're primarily related to Food Service, but there is also a Superintendent report Bob created that works best with the Crystal Reports Viewer. The Superintendent report would be run by the MSDS submission person to provide detailed information about the Count Day submission.

1. From within **Student Management** in the **000** entity, click on the **Custom Reports** tab
2. From within the **Custom Reports** module, click on **Reports**
3. On the right-hand side of the screen, click on the **Download Offline Viewer** button

Note: depending on your Operating System and/or Internet Browser, the options you see might be slightly different from what you see here

4. Click on **Download Offline Viewer**
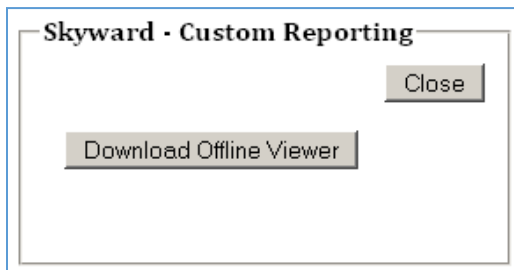
5. Click on **Save File**
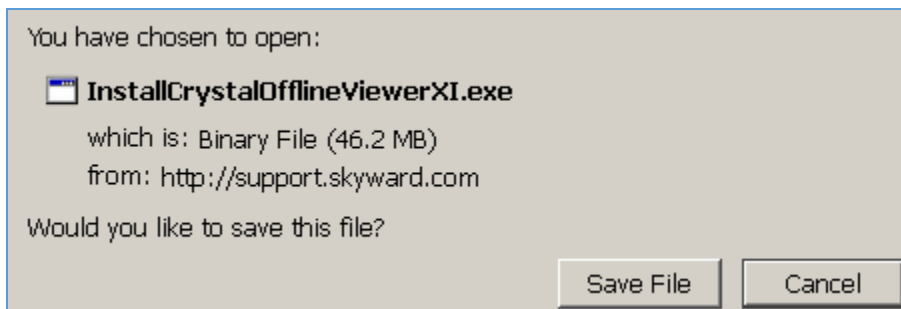
6. Save the file to your **Desktop**
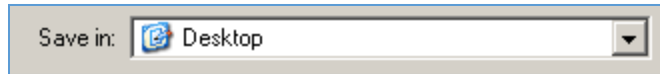
7. On the **Download Offline Viewer** Screen, click on **Close**
8. From your desktop, double-click on the InstallCrystal… icon:
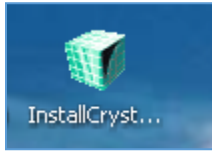
9. When prompted to open file, click on **Run**
10. On the **Setup** screen, click on **Next**
11. On the **License Agreement** screen, select **I accept the License Agreement** and click on **Next**
12. On the **Destination Folder** screen, click on **Next**
13. On the **User Information screen**, enter your **name** and **School District**
14. On the **Select Installation Type** screen, select **Typical** and click on **Next**
15. On the **Start Installation** screen, click on **Next**
16. On the **successful install** window, click on **Finish**

(34d) Customizing the RESA FS Monthly Summary to your Needs

This document is typically for the FS director and provides instruction on how to get specific information from the RESA Monthly Summary report

Examples of when this would be used:
- My High School also feeds Middle School kids. The cashiers don't switch registers between students coming down, so they're all reported under the High School counts. The Middle School kids have a different Price Category, so they can be separated by Price Category
- In my building, some students are fed by us, while others are fed by another district. They're reported under 2 different cafeterias and I only want to get a report of my students
- I need a breakdown of a particular item by pay type. For example, I have 5 different lunch options. These show up combined by pay type and a grand total. However, I need to see how many Sandwich Centrals were served to the different pay types

When you run the report, it will, by default, include every transaction for every customer on it. If you run the report using an Export Method of .rpt, you have the ability to filter out any information you don't want to see, so you can see details of what you do want to see

Here's a partial example of the customer purchase section:

Cafe	Benefit	Code	Purchase	Qty	Line Total	Cust. Total
SH2	Paid	SUP	Super	1	1.50	
SH1		BC	Bottle/Can Bev.	1	1.50	
SH4	Paid	RSDC	Ready Set Deli	1	3.00	
SH4	Paid	GAST	Grab A Stack/Ta	1	2.60	
SH1	Paid	GAST	Grab A Stack/Ta	1	2.60	
SH2	Paid	GAST	Grab A Stack/Ta	1	2.60	
SH1	Paid	PBS	Play Bowl/Sizz	1	2.60	
SH4		BC	Bottle/Can Bev.	2	3.00	
SH2	Paid	EO	Entree Only	4	10.00	
SH2		BC	Bottle/Can Bev.	6	9.00	41.00
SH2	Paid	GAST	Grab A Stack/Ta	1	2.60	
SH2	Paid	SUP	Super	1	1.50	
SH2	Paid	CNSB	Crust N Stuff/B	1	2.60	6.70

This shows which Café line the transaction occurred in, what the customer's pay type is that purchased the item, what the item code is, what the item description is, how many that customer purchased, the total amount item cost, and the total amount they purchased for the month. You can filter the report on any of these fields

Here's a part of the Summary section, which shows me how many meals and ala Carte items were purchased by Free/Reduced/Paid students and Adults. I can also filter on any of these areas:

Menu Types / Benefit   October 2015

	Adult	Student Free	Student Full-Pay	Student Reduced	Student Ala Carte	Total
ALA Carte	18	0	0	0	3557	3575
	19.65	0.00	0.00	0.00	4006.65	4026.30
Breakfast	0	347	103	27	0	477
	0.00	1.25	128.75	8.10	0.00	138.10
Lunch	26	1021	1865	251	0	3163
	91.00	0.00	4915.95	102.60	0.00	5109.55
Total	44	1368	1968	278	3557	7215
	110.65	1.25	5044.70	110.70	4006.65	9273.95

And, finally, there's a Food Purchased section, which shows me, as a total, the number of sales for this particular item, along with the dollar amount associated with the sale. I can also filter on this area

oat	55
.75 Oatmeal Bar	41.25
OT	112
Outtakes	247.20
PBS	833
Play Bowl/Sizz	1309.65

So, in my example, I want to see a breakdown of how many Outtake meals were purchased by the individual pay types. I can see that a total of 112 were sold. However, a total of 3163 lunches were served, so I can't tell, as the report is currently, which pay types purchased the Outtakes lunch. I will, therefore, filter the report to show only purchases of Outtakes

1. With the report open in the Crystal Reports Offline Viewer, click on the **Report** menu option at the top of the screen
2. Click on **Select Expert**
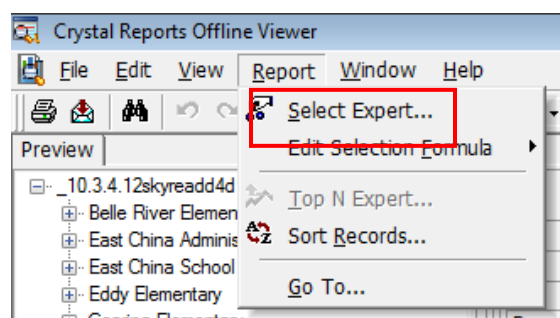
3. You're going to see a number of Report Fields, only a few of which you'll be interested in:
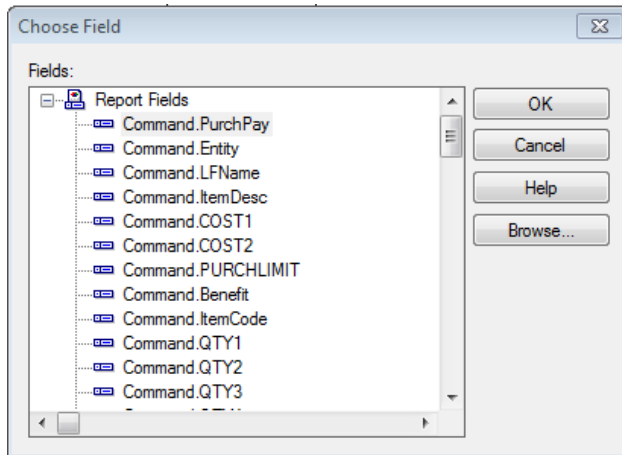
If you want to report on the item code (OT - Outtakes), you would select Command.ItemCode

If you want to report on a particular pay type (Free, Reduced, Adult…), you would select Command.FRCode

- **Note**: N = Paid

If you want to report on a particular item type (lunch, ala Carte…), you would select Command.ItemType

If you want to report on a particular benefit type (Student Free, Student ala Carte, Adult….), select PurchBenefit

If you want to report on whether or not a purchase is reimbursable, select StudReim

4. In my example, I would highlight Command.ItemCode and click on OK
This is the screen that comes up:
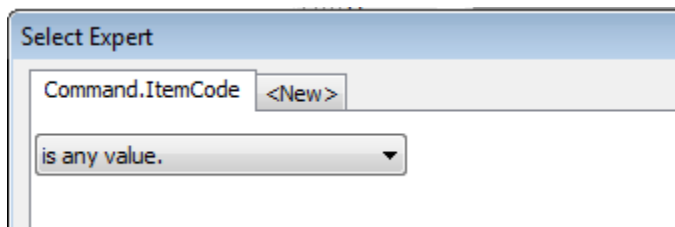
5. Because I want a specific item, I would change this to **is equal to**, and select the OT – Outtakes item from the other dropdown window
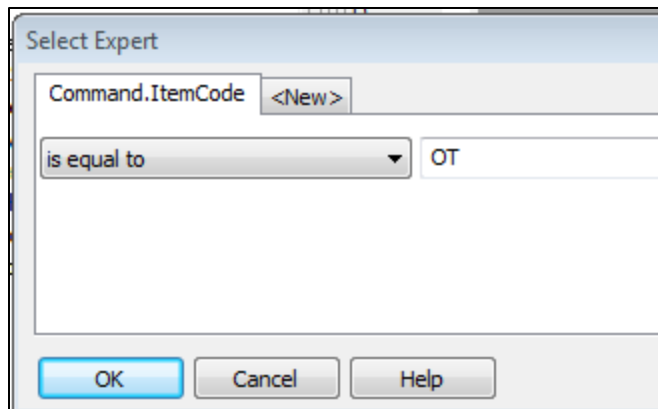
6. If this is the only thing you need to narrow down by, just click on OK. This is what the Summary section would now look like, where only Outtakes sales are shown:

October 2015 Food Purchased

	Total
OT Outtakes	112 247.20
Total	112 247.20

Menu Types / Benefit   October 2015

	Adult	Student Free	Student Full-Pay	Student Reduced	Total
Lunch	10 35.00	17 0.00	81 210.60	4 1.60	112 247.20
Total	10 35.00	17 0.00	81 210.60	4 1.60	112 247.20

If you wanted to print this report out, you would want to hide the details, as you would still see all of the specific transactions related to Outtakes. To hide the details:

7. In the upper left-hand corner, click on **View/Show or Hide Sections**
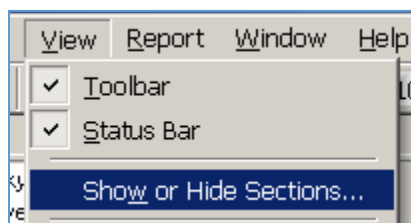
8. Click on **Group Header #2** and check the option to **Hide (Drill-Down OK)**
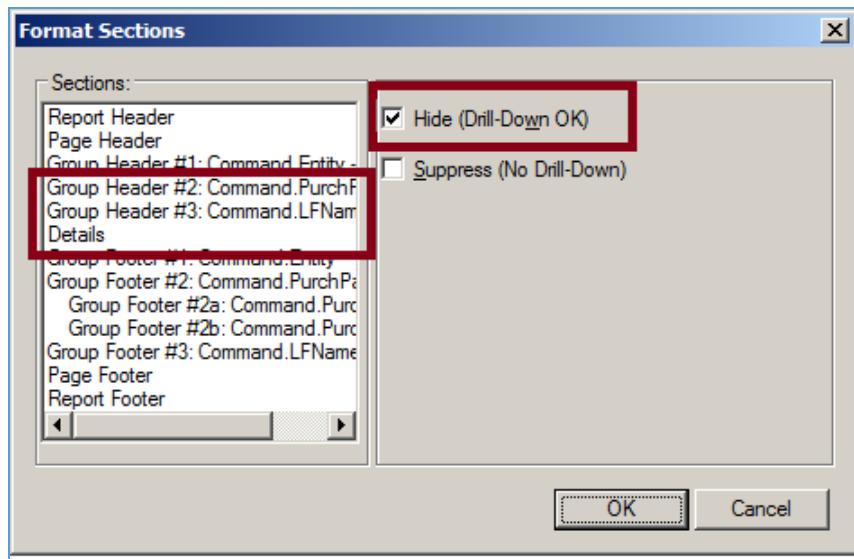
9. Do the same for **Group Header #3** and **Details**
10. Click on **OK**

(35) RESA FS Reimbursement Summary by School

This document is for the person in your district that submits the monthly Food Service reimbursement claim.

This is a RESA created report that's used to verify your reimbursement amount from the government. It is also used by Chartwells sites for some of their reporting purposes. It's found on the **Custom Reports tab/Reports/RESA FS Reimbursement Summary by School**

Note: in order for this report to work, you will have had to provide SIS Team with your reimbursement rates per building. Send the new rates if they've changed for the new school year

1. In the Skyward **000** entity, click on the **Custom Reports** tab at the top of your screen
2. In the **Custom Reports** module, click on **Reports**
3. Highlight **RESA FS Reimbursement Summary by School** and click on **Run**
4. From the **Export Method** dropdown, select **PDF Export Options**
5. Select the **Report Month** that you want to run the report for
6. Click on **Print**
7. When the report has finished processing, click on **View Report**

Sample Report:

East China School District TRAINING — Reimbursement Summary by School

	Adult			Student Free			Student Full-Pay		
	Served	Rate	Amount	Served	Rate	Amount	Served	Rate	Amount
Breakfast - SNB	0	0.000	0.00	1,833	2.060	3,775.98	512	0.280	143.36
Lunch - SNL	1	0.360	0.36	2,435	3.060	7,451.10	998	0.360	359.28
122 - Belle River Elementary	1		0.36	4,268		11227.08	1,510		502.64
Breakfast - BSB	0	0.000	0.00	925	1.930	1,785.25	492	0.280	137.76
Lunch - SNL	0	0.000	0.00	1,325	3.060	4,054.50	1,416	0.360	509.76
123 - Eddy Elementary	0		0.00	2,250		5839.75	1,908		647.52
Breakfast - Unset	0	0.000	0.00	551	0.000	0.00	264	0.000	0.00
Lunch - Unset	0	0.000	0.00	908	0.000	0.00	1,488	0.000	0.00
124 - Gearing Elementary	0		0.00	1,459		0.00	1,752		0.00

Note: if you see a column for Adult in this report, there's something wrong in your Item Master, with a Lunch Code, or with a Purchase. Call SIS Team to troubleshoot until you're comfortable with what you're doing

Note: if running this for the first time in a school year, make sure the reimbursement rates are correct/have been updated

(36) Purchases – Everything You Need to Know

This document is for anyone that needs to record, correct or report Food Service purchases. It covers the various ways purchases can be recorded to show you, based on your scenario, what the best method would be. It includes the following:
- Different ways purchases can be recorded
- Different ways purchases can be corrected
- Common options for Purchase reporting

Different ways purchases can be recorded:
- **POS**: in a traditional K-12 setting, this is the most often used option. Cashiers log into their own Point of Sale/register and ring up transactions as students come through the line
- **Purchase Entry by Homeroom**: this is used for various scenarios where meals are served in the classroom. Commonly used in Special Education or elementary buildings where breakfast is served in the classroom. These are the different options for Purchase Entry by Homeroom:
   - Teachers, through Teacher Access, can record student meals **(document 37a)**
   - A roster can be used **(document 37c)** to check off names of students that ate, which are later recorded by someone else **(document 37b)**
- **Through FS Payors**: this is not a recommended method for recording purchases, but it can be done. It's most often used to correct purchases

Different ways purchases can be corrected
- **POS**: so long as the batch update utilities have not been run, cashiers can use the Previous Activity option to correct purchases. They can delete and re-add them. However, once the batch update utilities have been run, no one can correct purchases from the POS. Refer to **(document 38a)** for instructions on correcting purchases within the POS
- **(37a** and **37b) Purchase Entry by Homeroom**: purchases can only be recorded here. Once transactions are saved, you cannot go back and make any changes
- **FS Payors**: after the batch update utilities have been run, the FS director would make any necessary changes using FS Payors. There are too many scenarios to cover on fixing purchases from here. Until you're comfortable with what you're doing, call SIS Team for assistance
- By running the **(18) Remove Customer Purchases and Payments** utility: this utility will remove all purchases and payments from a specified student
- By running the **(39) 2nd Meals Served** utility: this utility will mass remove any 2nd meals served to specified students/grade ranges
- By running the **(19) Change Customer Purchase Cafeteria** utility: this utility will take any transactions rung up under the wrong register and move them to the correct register. Example: elementary students were mistakenly rung up under the HS register

Common options for Purchase reporting
- **(34a) RESA FS Monthly Summary Report**: provides both detail and summary information on FS purchases by individual entity, and district-wide
- **(35) RESA FS Reimbursement Summary by School**: provides monthly reimbursement information, in summary format, broken down by entity
- **(34b) RESA FS Daily Summary Report**: provides summary information on FS purchases by individual entity, and district-wide

(37a) Purchase Entry by Homeroom – Elementary Teachers

This document is for elementary teachers in districts where the teacher records breakfast in the classroom

Note: in order for students to show up in your 'Homeroom', the student must be scheduled in your 1st period class, and your Homeroom code must be assigned to the student. The RESA has automated a utility to run at 9:00 am every weekday to assign student homerooms based on their 1st period course. If you don't see a student in your Homeroom entry, check with the building secretary to make sure the student is scheduled in your class as of today's date

1. Log into **Skyward**
2. Click on the **Food Service tab**
3. Click on **My Students Homeroom Entry**

The first time you record the purchases, you'll need to set up **Purchase Defaults**. To do so:

- Click on the **Purchase Defaults** button
- From the **Cafeteria** options, select the appropriate elementary register
- From the **Service Type** dropdown menu, select **Breakfast**
- Click on **Default Item 1** and select **Breakfast**
- Check the button to **Show**
- Click on **Save**

4. Highlight your **Homeroom** and click on **Select**
5. **Check** the box for those students that received a breakfast
6. Click on **Save**

Note: you are not able to tell from My Students Homeroom Entry if you served the students/which students you served on a particular day. For example: I go in today and check that all students received a breakfast. Let's say that later today I'm not sure if I recorded them or not. If I go back in and look, no boxes will be checked to indicate that they were already served. If I check them and Save again, I will be serving students a second breakfast

(37b) Purchase Entry by Homeroom – anyone other than Teachers

In districts that serve students by classroom, where meals are served and then recorded later, this document is for the person that will be recording the meals using Purchase Entry by Homeroom. It covers how to record purchases, as well as payments

Explanation: this is an easy option for serving students when they receive breakfast in the classroom and/or come down to the cafeteria by classroom and have limited ala carte options. This option is typically used for **breakfast in the classroom**. There are separate instructions on **(37d) Recording GSPR Meals**

Note: in order for this to work, students must have a homeroom associated to them. There is an automated utility that runs that assigns students to a homeroom based on their 1st period class. If a student does not appear under the correct classroom, it may be that the student is not scheduled in your class

1. From the individual entities where students are being served, click on the **Food Service** tab
2. From the **Purchases** module, click on **Purchase Entry by Homeroom**

The first time you access this you will need to click on the **Purchase Defaults** button
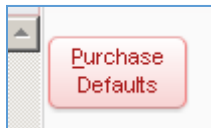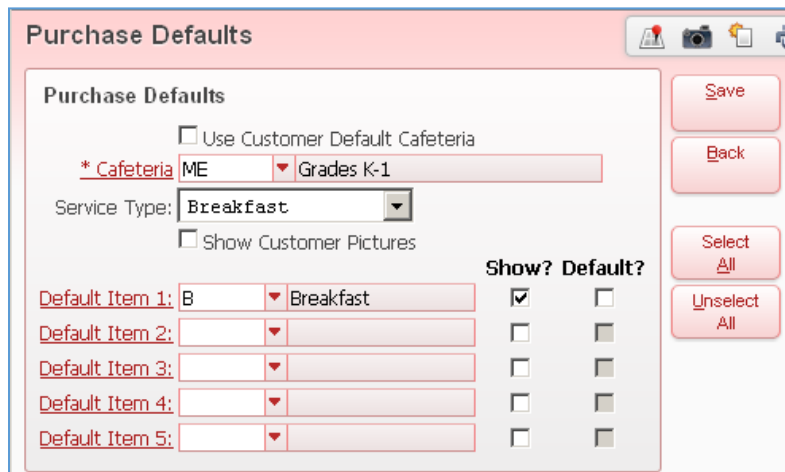
Cafeteria: click on this to select the register the students should be reported from
Service Type: select **Breakfast**
Default Item 1: click on this to select **Breakfast**
Check the buttons to the right for **Show**

Example:

Click on **Save**

3. Highlight a teacher's name and click on **Select**

Homeroom ▲	Building	Room #	School	Last Name
0131	363	0131	363	Gabler
0132	363	0132	363	Berry

4. Check the box for students that had breakfast
5. Click on **Save**

Example of screen before meals are checked:

Purchase Entry [Customers: 29]

Lori	Jillian
☐ Breakfast 1.25	☐ Breakfast 1.25

Edward	Ryleigh
☐ Breakfast 1.25	☐ Breakfast 1.25

Note: the teacher will always appear first

Note: you can also record payments here by clicking on the Add Payment button and selecting the appropriate customer

Note: Let's say I served a particular teacher's students and saved the purchases, and I now need to serve another student that I missed. If I go back to Gabler, I will not be able to see the options I checked the first time – everything will be blank. If I check breakfast for a student I already served, I just gave them a second breakfast. You cannot use Purchase Entry by Homeroom to determine who you've already served.

(37c) How to Print Purchase Entry by Homeroom Class List

This document is for districts that serve breakfast in the classroom, where someone marks off on a sheet who ate, and then someone else later rings up the transactions. It would be used only when students are served using the Food Service Purchase Entry by Homeroom option. It's an optional way of easily recording which students were served which items

Note: this document assumes that you already use this option and everything has already been set up for how you use it

1. From the individual entity, click on the **Food Service** tab
2. From the **Purchase** module, click on **Purchase Entry by Homeroom**
3. Highlight the first teacher and click on **Select**
   - **Note:** before generating the screenshot, you'll want to make sure all checkboxes are unchecked. If they're checked, do the following:
     - o Click on the **Back** button
     - o Click on the **Purchase Defaults** button
     - o **Uncheck** all the check boxes under the '**Default**' header
     - o Click on **Save**
     - o **Select** the teacher again
       - ▪ **Note**: once you're done with your screenshots, and if you turned off the default items, you may want to go back in Purchase Defaults and recheck them
4. Click on the **camera** icon in the upper right-hand corner
5. Once the screenshot has finished processing, click on **View Report**
6. **Print** the screenshot
7. **Close** the screenshot
8. **Repeat** for remaining teachers

Partial example of what the screen/report looks like:

The teachers would use this printed screenshot to check off who ate. The person recording the purchases would then use this to go back into Purchase Entry by Homeroom and serve the appropriate students

Note: the report does include last names, as well as the teacher's name, which have been erased for privacy purposes

(37d) Recording GSRP Meals

This document is for the person that records meals served to GSRP students. The following instructions assume that both breakfast and lunch will be recorded at the same time.

Note: you may currently be serving GSRP students using a different method than what is shown here. If so, and it works well, continue using it. However, this is probably an easier option

Note: in order for this process to work:
- GSRP students must be enrolled in Skyward (done by enrollment secretary)
- GSRP students must be scheduled in a GSRP course (done by enrollment secretary)
- GSRP students must be assigned to the GSRP Homeroom (an automated utility will be run to assign the Homeroom)

1. Log into **Skyward** and select the **Elementary** entity from your dropdown menu at the top of the screen
2. Click on the **Food Service** tab
3. Click on **Purchase Entry by Homeroom**

Note: the first time you go in here, you'll want to set up your **Purchase Defaults**:
- Click on the **Purchase Defaults** button
- Set the **Cafeteria** to **GSRP**
    - **Note:** if you don't have a GSRP cafeteria listed, call SIS Team to set it up
- Set the **Service Type** to **Lunch**
- For **Default Item 1**, select **GSRP Breakfast**
- For **Default Item 2**, select **GSRP Lunch**
- If you're serving a **GSRP snack**, select it for **Default Item 3**
- Check the box for both **Show** and **Default** for both items
- Click on **Save**

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4. Highlight the **GSRP Homeroom** and click on **Select**
5. If you're recording meals for previous days, change the **Meal Entry Date** at the top of the screen
6. Uncheck any students that did not get Breakfast and/or Lunch and/or snack if applicable
7. Click on **Save**
8. Click on **Yes** to the Proceed Message

---

9. Click on **OK** to the Purchases were successful message

Note: you cannot use Purchase Entry by Homeroom to see if you've served students already for a particular day. Every time you go in it's going to show all student meals checked. This doesn't mean that these items were previously served – it's just set to have all options checked every time you open up a homeroom. If you already served the students for a particular day and go back in here and click on Save again, you will possibly have served a 2nd meal to all the students. This entry screen does not tell you if you've served a 2nd meal (unlike in the POS)

(37e) Reporting GSRP Meals

This document is for whoever runs the GSRP report to get a Free/Reduced/Paid meal count to submit to the GSRP program. It shows how to obtain a monthly count for GSRP meals only

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Note: before being able to complete these steps, the Crystal Report Viewer software needs to be installed on your computer. If you don't have the ability to install software on your computer, contact your IT department and give them the instructions on **(34c) Installing Crystal Viewer**

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1. From the **000** entity, click on the **Custom Reports** tab at the top of your screen
2. In the **Custom Reports** module, click on **Reports**
3. Highlight **RESA FS Monthly Food Service Summary** and click on **Run**
4. From the **Export Method** dropdown, select **RPT Export Options**
5. Select the **Report Month** that you want to run the report for
6. Click on **Print**
7. When the report has finished processing, click on **View Report**
8. If prompted with what to open the file with, the option should be **Crystal Report Viewer**. Click on **OK**
9. You'll get an error about a later version. Click on **OK**

By default, every time you run this report, you're going to see a detail section for Payments made, a detail section for Purchases made, and a Summary section for each individual building. The report, with this level of detail, can be hundreds of pages long. In order to just see the Summary sections:

10. In the upper left-hand corner, click on **View/Show or Hide Sections**

11. Click on **Group Header #2** and check the option to **Hide (Drill-Down OK)**

12. Do the same for **Group Header #3** and **Details**
13. Click on **OK**
14. In the upper left hand corner of the screen, click on **Report/Select Expert**
15. In the list of fields, highlight **Command.ItemCode** and click on **OK**
16. From the **is any value** dropdown menu, select **is one of**
17. From the dropdown menu to the right, select the **GSRP** breakfast item
18. From the same dropdown menu, now select the **GSRP** lunch item
19. If you offer a GSRP snack and also need to report this, select it from the dropdown menu
20. Click on **OK**
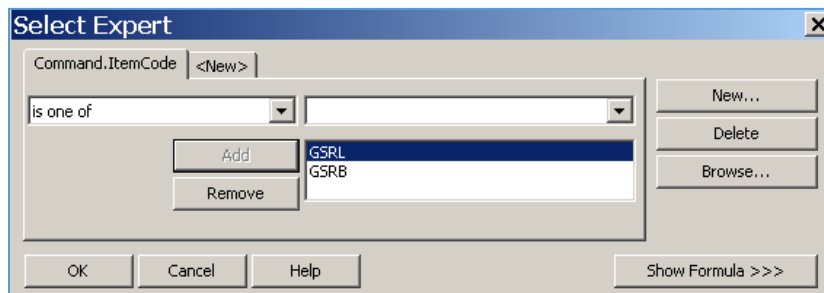
The results will display only GSRP meals, which are broken down by Adult, Free, Full Pay and Reduced:

Menu Types / Benefit   September 2015

	Adult	Student Free	Student Full-Pay	Student Reduced	Total
Breakfast	44	167	111	39	361
	0.00	0.00	0.00	0.00	0.00
Lunch	44	167	111	39	361
	0.00	0.00	0.00	0.00	0.00
Total	88	334	222	78	722
	0.00	0.00	0.00	0.00	0.00

September 2015 Food Purchased

	Total
GSRB	361
GSRP Breakfast	0.00
GSRL	361
GSRP Lunch	0.00
Total	722
	0.00

(38a) Fixing Purchases from within the POS - Cashiers

This document is for cashiers and shows how to change/remove a purchase in the POS line

Note: purchases can only be modified prior to the batch update utility running that day

Note: payments cannot be corrected by cashiers or in the POS line

Note: in order to do this, you need to add an option to your POS if it's not already there. If you don't already see a **Previous Activity** button on your screen:
- Click on the **Configure** button in the POS
- Click on the **Screen Fields** button
- Check the box for **Previous Activity**
- Click on **Save**
- Click on **Save**

If you've served a customer an item, that, once you've saved the transaction, needs to be removed, you can remove it yourself from within the POS as long as the batch utility has not yet run. This document walks you through the process of fixing a purchase after you have already 'saved' a transaction. You can also use part of this process to bring up a list of customers you served during this meal on this date. You can click on a name within the list to then bring that customer back up on your screen

So, let's say I served a student and, either immediately or 5 students later, I realized I didn't ring something up that they took, or I realized I accidentally rang up something the student didn't get. Either way, I need to fix something for a student that is no longer up on my screen:

1. From within the POS, click on the **Previous Activity** button in the middle of the screen

2. You will see a list of all students that you rang up in your line for this meal. You'll see an individual line for each item bought/payment made. In this example, Donna purchased 3 items and made a payment:

Name	S	Cust Cafe	Key Pad Number	Item	P Cat	Price	Payment
r, Donna	A	SCM	107717	PAY	PAY		5.00
r, Donna	A	SCM	107717	MUF		0.85	
r, Donna	A	SCM	107717	FV		0.55	
r, Donna	A	SCM	107717	CNSB		3.50	

3. Highlight any of the 4 transactions for this consumer, then click on the button to **Select Customer**

Select
Customer

4. Highlight the item you want to remove and click on **Delete Selected**

Lunch Activity for 04/20/2015
Payor Balance: 0.35   Total Lunch: 3

Description	Qty	Amount
--No Current Purchases--		
--Previous Purchases--		
SM1: $.85 Muffin	1	0.85B
SM1: Crust N Stuff/B	1	3.50B
SM1: Fruit/Vegetable	1	0.55B
Previous Total:	3	4.90

No Image Available

Delete Selected

Undo Purchase

View Payments

Previous

5. Repeat for any remaining items
6. Once you're done, you can either click on Change Customer to clear the screen or the next student can scan his/her card, type in his/her number, or you can search for the next student

(38b) Recording Payments in the POS

This document is for cashiers and covers how to record payments from within the POS

Note: payments cannot be modified from within the POS once they've been entered, regardless of whether or not the batch updates have been run. To fix an incorrect payment, refer to **16a – 16f**

In order to record payments, the individual cashier must have the option turned on within the POS Configuration button. To do this:

1. Log into the **POS**
2. In the upper right-hand corner, click on **Configure**
3. At the bottom of the screen, check the box for **Payment Options/Accept Payments**
4. Click the **+** sign to the left of Payment Options
5. For **Amount Tendered Default**, select **Zero**
6. For **Amount Applied Default**, select **Amount Tendered**
7. Click on **Save**

To record the payments, there are different options:
Pay in Full:

In this example, the student owes a total of $5.80, but only owes .40 for the current transaction. If you click on the Pay in Full button and select Yes, it's going to automatically apply $5.80 to the student's account. With this option, you don't have the ability to change the amount. If the student wasn't going to pay exactly $5.80, you would select No here

Point of Sale

Apply 5.80 to the amount paid?

| Yes | | No |

The other option is to click on the Payment button. Doing so will bring up a screen that looks something like this:

Today's Amount Due:	5.80
Amount Tendered	0.00
Amount Applied	0.00
Change:	0.00

- Today's Amount Due: the total the student currently owes
- Amount Tendered: enter what the student is handing you
- Amount Applied: enter the amount you're keeping
- Change: the system will tell you how much to give back

In my example, the student handed me a $10, and wants to apply $8 to his account. This is what it would look like:

Today's Amount Due:	5.80
Amount Tendered	10.00
Amount Applied	8.00
Change:	2.00

If the customer is paying via check, include the Check Number in the lower left-hand side of the screen
Once the payment has been recorded, click on the Apply Payment button

(39) 2nd Meals Served

This document is typically for Food Service directors and covers how to run a utility to mass remove 2nd meals.

Explanation: through various means, a student may be served a 2nd reimbursable meal on any given day. Sometimes they truly did get one, other times it's due to cashier error/student error with entering the wrong ID. This process is usually only done at the elementary level, where students don't normally get a 2nd meal. It is not recommended that this be run at the secondary level, as these students quite often purchase a 2nd meal.

How to set up a template to remove 2nd quantity purchases if you don't already have one in your name:
1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Setup/Utilities**
3. From the **Mass Delete Utilities** section, click on **Remove Second Quantity Purchases**

Do you have a template called **XX: Remove 2nd Ele Meals** (where XX is your initials)?
- **Yes, and it's my first time running it this school year**: skip to the next section
- **Yes, and it's not my first time running it this school year**: skip to the last section
- **No**: call SIS Team to set it up. There are too many scenarios to document the proper way for each district to set it up

---

Running the utility for the first time in the current school year:
4. **Highlight** the template for **XX: Remove 2nd Ele Meals** (where XX is your initials) and click on **Edit**
5. If you have entity numbers listed in the Entity Low and High ranges for your particular elementary buildings, but not in the Grade/Grad Year fields, proceed to step 6

Proceed to step 6:

Call SIS Team for either of these: there are Grade/Grad Yr Low and/or High values, or there are no Grade/Grad Year values and the Entity Low and High is 0000 to 9999. Values may need to be changed, but there may be a better way to do it so that you don't have to update them every year

6. If you leave the Purchase Dates wide open, you'll never have to update these from one year to the next. If they're not already, set the Low Date to 01/01/1900 and the High Date to 12/31/2999 (not what's shown in the screenshot)
7. Click on **Save and Process**
8. If there were no 2nd meals served, you'll get a message that No records were found to process and you don't need to do anything more. Otherwise, skip to step 8
9. Click on **Preview Data to Process**
10. You'll see a list of students whose 2nd meals will be removed. If you want to remove them for everyone, just click on **Back**
11. Click on **Run the Update**
12. Click on **OK**
13. When the report has finished processing, click on **Back**. You don't need to view the report
14. Click on **Back** on the My Print Queue screen

Note: if you were to rerun this process right now, you would see all the same students in the list. That's because the purchase record still exists, but with a 0 quantity. In order to clear this out, you'll need to run the **(40) Remove ALL Purchase Records without Purchases** utility

Note: if you have multiple Lunch items available – for example, Sandwich Central, Salad Bar, Grab a Stack…. It will only remove a 2nd purchase of the same item. So, if a student had both Sandwich Central and Salad Bar on their account for a particular day, it would not remove either of them. It will only remove it if, for example, the student had 2 Sandwich Centrals

Running the utility after the first time in the current school year:
1. Click on the **Food Service** tab
2. From the **Food Service** module, click on **Setup/Utilities**
3. From the **Mass Delete Utilities** section, click on **Remove Second Quantity Purchases**
4. Highlight the template titled **XX: Remove 2nd ELE Meals** (where XX is your initials) and click on **Process**
5. If there were no 2nd meals served, you'll get a message that No records were found to process and you don't need to do anything more. Otherwise, skip to step 6
6. Click on **Preview Data to Process**

7. You'll see a list of students whose 2nd meals will be removed. If you want to remove them for everyone, just click on **Back**
8. Click on **Run the Update**
9. Click on **OK**
10. When the report has finished processing, click on **Back**. You don't need to view the report
11. Click on **Back** on the My Print Queue screen

Note: if you were to rerun this process right now, you would see all the same students in the list. That's because the purchase record still exists, but with a 0 quantity. In order to clear this out, you'll need to run the **(40) Remove ALL Purchase Records without Purchases** utility

Note: if you have multiple Lunch items available – for example, Sandwich Central, Salad Bar, Grab a Stack…. It will only remove a 2nd purchase of the same item. So, if a student had both Sandwich Central and Salad Bar on their account for a particular day, it would not remove either of them. It will only remove it if, for example, the student had 2 Sandwich Centrals

(40) Remove ALL Purchase Records without Purchases

This document is for the Food Service director and covers some cleanup steps to remove 0 quantity purchases. This utility should be run monthly

Explanation: when a purchase is made and then later removed – either by the cashier or through Food Service/Customers, you still see a transaction for this purchase in the customer's account, but it will show a 0 quantity. Running this utility removes the 0 quantity purchases and cleans up the data

Note: Before this one can be run, you have to clear any FS Alerts/Batch Updates if they exist. Refer to **(50a) FS Alerts-Batch Updates – FS Directors**

1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Setup/Utilities**
3. From the **Mass Delete Utilities** section, click on **Remove ALL Purchase Records without Purchases**
4. Click on **Process**
5. If there are no 0 quantity purchases, you'll get a message that no records were found. Just click on Back and you're done. Otherwise, continue to step 6
6. Click on **Preview Data to Process**
7. You'll see a list of students who have 0 quantity purchases. Click on **Back**
8. Click on **Run the Update**
9. Click on **OK**
10. When the report has finished processing, click on **Back**. You don't need to view the report
11. Click on **Back** on the My Print Queue screen

(41a) Purchase Transactions Log Report

This document is typically for the Food Service director and is used to troubleshoot purchases. It's typically run by Date, which provides a chronological list of transactions district-wide, or by User, which provides a chronological list of transactions recorded by a particular cashier

The report shows the customer name, date of purchase, what was purchased, who rang up the transaction and how it was entered (example: POS)

You can be selective on a date/date range or individual cafeterias. You can also choose to view either/or/both Added transactions, as well as Edited transactions

Because there are so many variables on how and why to run this, this document doesn't cover them all. This is how you get to the report:

1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Reports**
3. From the **Reports** menu, click on **Purchase Transactions Log Report**
4. Give the report a descriptive name based on what you're running it for, and select the sort order for which you want to run the report
   - **Note**: this is typically run by Date to get a chronological listing of district-wide purchase transactions, or by User, which gives a chronological listing of purchases sorted by cashier
5. Set the Purchase Date Range for the day/s you want to report on
6. Click on **Save and Print**

(41b) Payment Transaction Log Report

This document is typically for the Food Service director and is used to troubleshoot payments. It's typically run by Date, which provides a chronological list of transactions district-wide, or by User, which provides a chronological list of transactions recorded by a particular cashier

The report shows the customer name, date of payment, payment details, who rang up the transaction and how it was entered (example: POS)

You can be selective on a date/date range or individual cafeterias. You can also choose to view either/or/both Added transactions, as well as Edited transactions

Because there are so many variables on how and why to run this, this document doesn't cover them all. This is how you get to the report:

1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Reports**
3. From the **Reports** menu, click on **Purchase Transactions Log Report**
4. Give the report a descriptive name based on what you're running it for, and select the sort order for which you want to run the report
   - **Note**: this is typically run by Date to get a chronological listing of district-wide payment transactions, or by User, which gives a chronological listing of payments sorted by cashier
5. Set the **Purchase Date** Range for the day/s you want to report on
6. Click on **Save and Print**

(42) Reports by Payor, Customer, School

This report would be run by the Food Service director in districts/situations where payments are recorded for all customers on one register, but need to be reported separately. **Examples** of when you would use this:

- A cashier was logged into the HS register and rang purchases and payments up for elementary students. The **(19) Change Customer Purchase Cafeteria** utility was run to move purchases to the correct register, but payments cannot be moved. Most reports are going to report all payments at the HS (in this example), but you could run this report to see a breakdown of payments by the students enrolled school
- When a cafeteria serves multiple buildings and all student purchases/payments are rung under one register. This situation would be the same as the one above. You would still run the **(19) Change Customer Purchase Cafeteria** utility, and then run this report to get separate payment totals

1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Reports**
3. From the **Reports** menu, select **Reports by Payor, Customer, School**

Note: the instructions below are specific to districts that have to do this on a daily basis – not to correct mistakes. Adjust the options as needed for your specific situation

I do have a template called XX: Reports by School (where XX is my initials):

4. Highlight the template and click on Edit
5. Change the Date of Payment Low and High dates to the date you need to report on
6. Click on Save and Print
7. Once the report has finished processing, click on View

I do not have a template called XX: Reports by School (where XX is my initials):

4. Click on the **Add** button
5. Give the template a description of **XX: Reports by School** (where XX is your initials)
6. Check the box to **Share with other users**
7. Set the **Date of Payment Low** and **High** dates to the date you want to report on
8. **Check** the box for **All Cafeteria Codes**
9. In the **Payment From** section, uncheck everything but **Wand Entry**
10. In the **Sort Order** section, check **School ID**
    - **Note**: if you want to include customer names, check the box for **Payor Name**. If this isn't checked, you'll just see a batched payment amount without a name attached to it
11. In the **Print Totals** for section, check **School ID**
    - **Note**: if you selected Payor Name above, do not check Payor Name here
12. In the **Print Order Fields**, check **School ID**
    - **Note**: if you selected Payor Name in step 10, check it here as well
13. Click on **Save and Print**

You'll see all batched payments – 1 for each payment recorded – with a total by building/district at the bottom

(43a) Wanding Messages

This document is for the Food Service director and would be used to add messages to a student's FS account

In Skyward's Food Service, a **(43a) Wanding Message** is a message that pops up every time the student's name is brought up in the Point of Sale. **Note**: the cashier must click on the message in order to continue on with the purchase, but the system will still let them do something the message said not to do. For example, if a message pops up with 'No Charging', the system will still allow the cashier to let the student charge
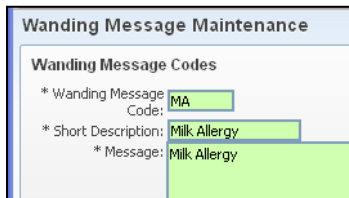
Note: there are 2 other options to **(43b) Stop All Purchases** or **Stop All Ala Carte Purchases.** With these options, the cashier must still acknowledge the message, but the system will not allow them to proceed with what they were trying to do. For example, if the student has a Stop All Ala Carte Purchases flag set, nothing will happen if the student attempts to buy a meal. However, if the cashier clicks on an Ala Carte item, the message will pop up and won't allow the cashier to serve this student an ala carte item.

Wanding Messages:
Before a Wanding Message can be assigned to a student, it has to be created. Once the message exists, you can then attach it to a student

To create the message:
1. Click on the **Food Service** tab
2. In the **Food Service** module, click on **Setup/Codes/Wanding Messages**
   - **Note**: If the message already exits, you just need to attach it to the student
3. Click on **Add**
4. Enter a **Wanding Message Code**
5. Enter a **Short Description**
6. Enter a **Message**

7. Click on **Save**
8. Repeat for any additional messages

To attach the message to a student:
1. Click on the **Food Service** tab
2. In the Payor/Customer module, click on **Customers**
3. Find the student the message should be attached to
4. On the right-hand side, click on **Edit**
5. Click on the **Wanding Message(s) #1** link

6. Highlight the appropriate message and click on **Select**
7. Click on **Save**

(43b) Stop All Purchases or All Ala Carte Purchases

This document is for whoever would put a notice on a student's account when a parent indicates the student should not be purchasing anything at all, or should not be purchasing any ala Carte items

Explanation: in Food Service, there are 2 different ways to put an 'alert' on a student's account. One is to use a [(43a) Wanding Message](#). With a Wanding Message, the message appears every single time the student comes up in the POS, regardless of what they're trying to do. For example, if they have a 'No Charging' Wanding Message associated with them, as soon as the student's name comes up in the POS a No Charging message will appear, even if he's not trying to charge. The cashier must acknowledge the message, but the system will still allow them to do what the message said not to do.

Note: There are also the options to **Stop All Purchases** or to **Stop Ala Carte Purchases** (covered here). If either of these options is set, the message only appears if one of these things occurs, and although the cashier must acknowledge the message, the system will not let them continue on with the purchase

To add a Stop Purchase flag to a student:
1. Click on the **Food Service** tab
2. In the Payor/Customer module, click on **Customers**
3. Find the student the message should be attached to
4. On the right-hand side, click on **Edit**

There are 2 different options here. It's very important you select the right option, or you could have unintended results:

Stop ALL Purchases: when this option is set to Stop, the student will not be allowed to buy ANYTHING in the POS
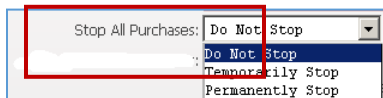
Note: there doesn't seem to be any difference in Temporarily Stop or Permanently Stop. In either case, you have to go in here and manually change them if the parent changes their mind

Stop Ala Carte Purchases: when this option is set to Stop, the student will not be allowed to buy any ALA CARTE items. If Stop All Purchases is set, this one does not also need to be set
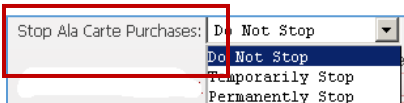
Note: there doesn't seem to be any difference in Temporarily Stop or Permanently Stop. In either case, you have to go in here and manually change them if the parent changes their mind

5. Select the appropriate option from the dropdown box
6. Click on **Save**

(43c) Customer Wanding Messages Report

This document is typically for the Food Service director and would be run to obtain a list of all customers that have Wanding Messages on their Food Service Accounts

1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Reports**
3. In the **Reports** menu, click on **Customer Wanding Messages Report**

I do see a template called XX: All Wanding Messages, where XX is my initials:
4. Highlight the template and click on **Print**

I do not see a template called XX: All Wanding Messages, where XX is my initials:
4. Click on the **Add** button
5. Give the template a description of **XX: All Wanding Messages**, where XX is your initials
6. For **Status**, you can choose to see only **Active** customers or **Both** active and inactive
7. Click on the link for Select Wanding Messages
8. Check all options **except** the (blank) option
9. Click on **Save**
10. Click on **Save and Print**

(44a) Sales Activity – Cashiers

This document is for cashiers and is used to record the amount of money you have in your cash drawer at the end of the day. You will then run the report to see if you are over/under/balanced

You will create this report one time. After you create it, you will edit it daily to change the date. The report cannot be created the first time until you actually have a Deposit Amount to enter. Therefore, it cannot be created ahead of time

1. From the individual buildings, click on the **Food Service** tab
2. Under the **Food Service** module, click on **Reports**
3. Click on **Sales Activity Report**

I do have a report template called XX: Sales Activity (where XX is my initials)
The first time you run this, you need to create the report:
4. Highlight the template and click on **Edit**
5. Select the **Payment Date** you wish to report on
6. In the **Deposit Amount** field, enter the amount in your cash drawer minus your beginning balance
7. Set **Report Type** to **Summary**
8. Enter in your **REGISTER** for your **Cafeteria**
9. Click on **Create**
10. When prompted if you're sure, click on **Yes**
11. Click on **Save and Print**

I do not have a report template called XX: Sales Activity (where XX is my initials)
4. Click on **Add**
5. Give the template a description of **XX: Sales Activity** (where XX is your initials)
6. Select the **Payment Date** you wish to report on
7. In the **Deposit Amount** field, enter the amount in your cash drawer minus your beginning balance
8. Set **Report Type** to **Summary**
9. Enter in your **REGISTER** for your **Cafeteria**
10. Click on **Create**
11. When prompted if you're sure, click on **Yes**
12. Click on **Save and Print**

Note: if your drawer is off and you recount, then discover you entered an incorrect amount the first time:

- Re-enter a negative amount for what you already entered. This zeroes the report out. For example, if I mistakenly entered 45.10, but it was really 4.51, I would first want to enter - 45.10, followed by 4.51

Sample Report:

(44b) Master Sales Activity Report

This document is for Food Service directors and covers how to run a master report to see if the cashier's cash drawers are under/over/balanced. It would only be used in districts where the cashiers reconcile their cash drawers – whether they do it between meals or just after lunch

Important Note: do not use this report for anything other than to see if cash drawers are balanced or not. Do not use it for any purchase/payment transactions, as what you see here may not be right. For example: you have auto serve turned on and breakfast is automatically served to a student. Even if the cashier takes it off (even before saving it), this report will still show that breakfast was served. It does not show that it was removed

1. From the **000** entity, click on the **Food Service** tab
2. From within the **Food Service** module, click on **Reports**
3. Click on the **Sales Activity Report**

I do have a template called XX: Master Sales Activity (where XX is my initials):
4. Highlight **XX: Master Sales Activity** and click on **Edit**
5. Click on **OK** to the **Super User** message
6. Enter the **FS Password** and click on **Save**
   - The password is the FS director's first initial and last name – up to only 8 characters. Example: jhumphre
   - The passwords were set up using the FS director's name at the time the district was converted to Skyward. If you have a new director and want the password changed, call the RESA SIS help desk to have it reset using the new directors name
7. Set the **Payment Date** range you wish to report on
8. Click on **Save and Print**

I do not have a template called XX: Master Sales Activity (where XX is my initials):
4. Click on **Add**
5. Give the template a description of **XX: Master Sales Activity** (where XX is your initials)
6. Click on the **Super User button**
7. Enter the **FS Password** and click on **Save**
8. Set the **Payment Date** range you wish to report on
9. From the **Report Type** dropdown menu, select **Summary**
10. **Uncheck** the box to **Report on cafeterias with deposit record only**
11. **Check** the box to **Print Deposit Summary by Date, Entity**
12. Click on **Save and Print**

You can see whether or not individual lines are balanced, or you can look at the last page of the report to get a line summary:

DATE	ENTITY	TOTAL DEPOSIT	SURPLUS/DEFICIT
10/01/2015	211	225.70	0.00
10/01/2015	480	461.75	0.00

Sample Report:

```
1fsrpt53.p 06-2                        East China School District TRAINING               06/13/14           Page:1
05.14.02.00.00                    Food Service Sales Activity Report for 06/02/14                            11:34 AM


CASHIER NAME              ALPHAKEY      REF CAFE   DEPOSIT AMT   ITEM TYPE  LUNCH CODE/ITEM    QUANTITY  SALES AMT   TENDERED AMT  PAYMENT AMT
Kimball, Barb            KIMBABAR000  1   BRE          14.00
                                                                 Alacarte  MJ  -Milk/Juice        10       5.00        2.00         2.00
                                                                           SN  -Snacks           16       6.40        6.40         6.40
                                                                           SUP -Super             4       5.00        1.25         1.25
                                                                           **ITEM TYPE TOTAL**   30      16.40        9.65         9.65

                                                                 Breakfast DC                   110       0.00        0.00         0.00
                                                                           Free                  20       0.00        0.00         0.00
                                                                           FS                     4       1.25        0.00         0.00
                                                                           Paid                  14      17.50        0.00         0.00
                                                                           Reduced               12       3.60        0.00         0.00
                                                                           **ITEM TYPE TOTAL**  160      22.35        0.00         0.00

                                                                 Lunch     DC                   153       0.00        0.00         0.00
                                                                           Free                  31       0.00        0.00         0.00
                                                                           FS                     3       0.00        0.00         0.00
                                                                           Paid                  53     108.65      117.30       117.30
                                                                           Reduced               27      10.80        8.50         8.50
                                                                           Staff                  3       9.75        0.00         0.00
                                                                           **ITEM TYPE TOTAL**  270     129.20      125.80       125.80

                                                                           **CAFETERIA TOTAL**  460     167.95      135.45       135.45

                                                                           ****GRAND TOTAL****                                    135.45
                                                                           **DEFICIT DEPOSIT**                                    121.45-

        ************************ End of report ************************
```

In this example, only Barb recorded a deposit, and it shows that cafeteria BRE was short by $121.45. This is likely because Barb recorded the wrong amount or there were 2 cashiers on that line (breakfast and lunch) and only one of them recorded their deposit amount
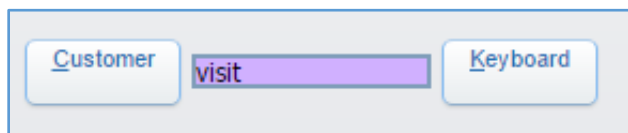
(45a) Visitor Account in Skyward's Food Service

Skyward's Food Service does not allow for anonymous cash sales. Every transaction must be rung up under someone's account. For customers that may not have a Food Service account, and would not have one created (a parent, for example), you can use the Visitor Account created in Food Service to record sales for these customers

A 'Visitor' account has been created in most (if not all) Food Service districts, which is used to record purchases for anyone that doesn't have an account in Food Service. This Visitor account can only be used when the customer is paying for what they're purchasing – it cannot be charged against. If the customer wants to maintain a Food Service account, but you cannot find them in the POS, provide the person in your district that's responsible for assigning Skyward permissions this document: **(45b) Creating Food Service Staff-Adult Customers**
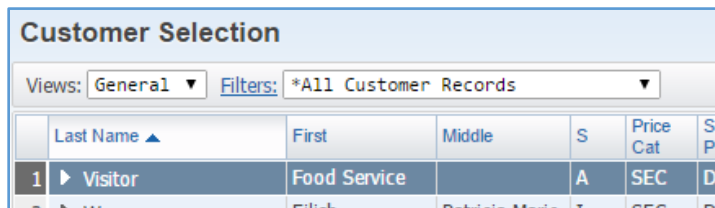
Note: a separate Visitor account exists/should be created for each building in your district

You can bring up the visitor account by typing visit in the text box on the POS screen:
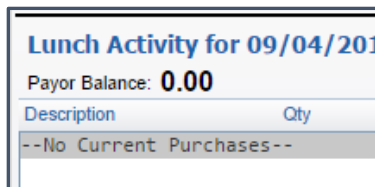
Or by clicking on the Customer button and searching on visitor:

Prior to serving anything to the Visitor, make sure the starting Payor Balance is $0.00, and that the ending balance is also $0.00:

Note: if auto-serve is turned on, you'll see a negative Payor Balance for the price of the auto-served item. In this example, you can see that their balance is $3.50, but that's because they were served a $3.50 lunch

Lunch Activity for 09/04/2015

Payor Balance: **-3.50**

Description	Qty	Amount
--Current Purchases--		
Lunch	1	3.50
Current Total:	1	
--No Previous Purchases--		

(45b) Creating Food Service Staff/Adult Customers

This documentation is for whoever creates Skyward Faculty accounts in your district and covers what to do if an adult wants to maintain a FS account but isn't found in the POS system

Background: anytime a student is enrolled, a Food Service customer record will automatically be created for him/her, with a Lunch Code of Paid, and a Price Category for where they're enrolled. Example: Elementary or Secondary. Faculty, however, is not automatically created, and a Food Service utility needs to be run in order to pull them into Food Service Customers.

While it is possible to create a 'Customer' in Food Service/Customers, the account you create is always considered an Adult account, but is given a Lunch Code of P, which is a Student Lunch Code. Applications have to be created to correct this, which result in error messages in certain reports. **The end result is that there are very few scenarios where you would create an account in Food Service**. The better way to go about this is to create a Faculty account and then run the utility to create the Faculty record as a Food Service Customer.

When you would do this: when a faculty member wants to maintain a Food Service account but they don't currently have a staff record in Skyward. Examples of who this might apply to are Custodians and Para-Pros

To create the Staff record (done by the person in your district that creates Faculty accounts):
1. In Skyward's **Student Management** module, click on the **Staff** tab
2. If needed, switch to the entity where the staff member will be eating. If they might be at different buildings, select any one of them but 000. Whichever one you add is where the person will be reported for Food Service
3. Within the **Staff** module, click on **Staff**
4. Click on the **Add button**
5. Type in part of the person's first name and last name. You don't want to type either name in its entirety, as they might already exist with a slightly different spelling. For example, if you're searching for Matthew VanConant, it's possible that this person already exists as Matt Van Conant. If you were to type in your entire search criteria, it wouldn't find him. Typing Van for a last name, and Mat for a first, will produce anyone whose first name starts with Mat and whose last name starts with Van
6. Once the name has been entered, click on the button for **Click Here When Full Name is Entered**

Name not found in the Matching Names field:

7.1 Click on the button to **Add Entered Name to Staff**

7.2 Staff Address information is optional. Enter whatever information you have and click on **Continue Add**

7.3 General Information is all optional. However, I would recommend at least entering a Gender, Race and Email address

7.4 Click on **Continue Add**

7.5 The Staff Information screen may or may not be optional. If you click on Continue and didn't enter something it needs, it will prompt you to enter it

7.6 Click on **Save**

7. 7 Skip to step 8

Name found in the Matching Names field, but option to click on Select Name And Add to Current Entity As Staff button is grayed out:
7.8 The staff member already has a faculty record in the entity you're trying to add them to
7.9 Skip to step 8

Name is found in the Matching Names field:
7.10 With the name highlighted, scroll to the far right, until you see the header for Name Types
7.11 If, under Name Types, you see 'Student' associated with this record, do not use it. Instead, follow the process above where name is not found in matching field names

 = okay to use   = do not use
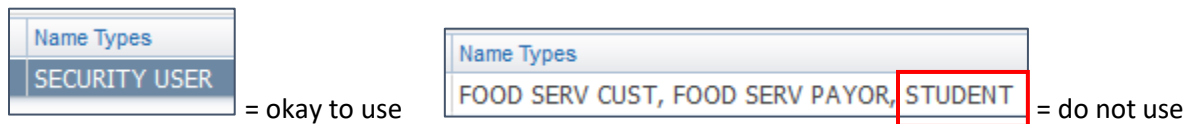
7.12 Click on **Select Name and Add to Current Entity as Staff**
7.13 Click on **Save**
7.14 Skip to step 8

8. Once the faculty account exists, you can switch to the 000 entity and add additional building access. This is done by clicking the dropdown menu next to the person's name and expanding the Entity section. Here you can click on Add Staff Entity and add any additional building access s/he might need. This is also where you can set other access to Inactive. For example, they no longer need access to building 400. You can click on Edit and change the Current/Next Year Status to Inactive

Now that the faculty account exits, you'll run a utility in Food Service to make them a Food Service Customer:
1. Within **Student Management**, click on the **Food Service tab**
2. Within the **Food Service** module, click on **Setup/Utilities**
3. Under the **Mass Create Utilities** section, click on **Create Customers**
4. If you don't already have your own template there with this name, click on **Add** to create one with this name:
   XX - Create Staff FS records (where XX is your initials)
5. Create your template with these settings:

Entity Range

Entity Low: [   ] High: ZZZZ

Student Ranges ☐ Mass Create Student Customers

Staff Ranges ☑ Mass Create Staff Customers

Staff Key Low: [   ] High: ZZZZZZZZZZZ

Status: Active ▼

☑ Include Discipline Officer ☑ Include Teachers
☑ Include Substitutes ☑ Include Staff Unassigned to Buildings
☑ All Buildings [Building]

* Lunch Code: S ▼ Staff

☐ Use Food Service Entity Defaults

6. Click on **Save and Run**
7. Once the Request has been Completed, click on **View Report**
8. Look through the various pages to make sure the account you just created is listed. Each building has its own page, so you might have to scroll through a few to find yours

(46) Price Category Audit

This report/utility is for the Food Service Director and should be run on occasion to see if all students have the correct Price Category for their particular building/grade level. It should especially be run at the end of September, after building/grade level changes have been finalized for the school year

Explanation: when a student is enrolled in a building/grade level, they are given a default Price Category based on what building/grade level they're initially enrolled in. If the student moves to another building that has a different Price Category (for example: was going to be in 6th grade but is now being retained in 5th grade), their Price Category doesn't automatically get updated. The enrollment secretary will need to know to change the Price Category where applicable, otherwise the student won't be charged the correct amount in the cafeteria. In some districts, there are multiple Price Categories in a single building, so, if a student is switched from a grade level that has one price category, into another grade that has a different price category, it isn't automatically changed. This report will show if there are any issues based on grade level and price category, and the utility can be run to update any existing transactions

Note: when the RESA runs the year end rollover process, a utility is run to update all student price categories. However, after this takes place, the FS Director should periodically be running the below documented utility to correct any issues where students moved but didn't get the appropriate category.

To run the report/utility:
1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Setup/Utilities**
3. From the **Utilities** menu, click on **Price Category Audit**

I <u>do</u> have a template called XX: Update Price Category, where XX is my initials
4. Highlight the template and click on **Process**
   - If there are records to be corrected, continue to step 5. Otherwise, you'll get a message that no records were found and you can click on Back
5. Once the process has finished, click on **Preview Data to Process**
6. You'll see a list of students that have an incorrect Price Category based on the building and/or grade they're enrolled in. It will show what their current PC is, as well as what it will be changed to. If any students should not be changed, highlight his/her name and click on Remove Record. When prompted if you're sure, click on Yes
7. For the remaining students, you'll want to look at the **Default Café** associated with them, as this may also be incorrect for the building they're enrolled in. If you're not sure what the Default Café should be, refer to **(02) District Codes and Utilities** for your district. If there are students with incorrect cafeterias, click on the Report button and print the list to address in later steps. Close the report
8. Click on **Back**
9. Click on **Run the Update**
10. Click on **OK**
11. Once the utility has finished processing, click on **Back** – you don't need to view the report

If there were students that had the wrong Cafeteria, refer to **(17) Changing Default Cafeterias**

I do not have a report called XX: Update Price Category, where XX is my initials

4. Click on the **Add** button
5. Give the template a description of **XX: Update Price Category** (where XX is your initials)
6. The **Student Status** should be **Active**
7. **Check** the box to **Update Current Transaction**
8. Click on **Save and Process**
   - If there are records to be corrected, continue to step 5. Otherwise, you'll get a message that no records were found and you can click on Back
9. Once the process has finished, click on **Preview Data to Process**
10. You'll see a list of students that have an incorrect Price Category based on the building and/or grade they're enrolled in. It will show what their current PC is, as well as what it will be changed to. If any students should not be changed, highlight his/her name and click on Remove Record. When prompted if you're sure, click on Yes
11. For the remaining students, you'll want to look at the **Default Café** associated with them, as this may also be incorrect for the building they're enrolled in. If you're not sure what the Default Café should be, refer to **(02) District Codes and Utilities** for your district. If there are students with incorrect cafeterias, click on the Report button and print the list to address in later steps. Close the report
12. Click on **Back**
13. Click on **Run the Update**
14. Click on **OK**
15. Once the utility has finished processing, click on **Back** – you don't need to view the report

If there were students that had the wrong Cafeteria, refer to **(17) Changing Default Cafeterias**

(47) Daily Income, Sales and Deposit Report

This document is for the Food Service director and can be used to get a summary of purchases and payments by building and by date

Note: in this report, all ala carte purchases are listed under the student column. This report does not break down ala carte sales for students versus staff

Note: you can also get this information from the **RESA FS (34b) Daily** and/or **(34a) Monthly** **Summary Reports**, which does break ala carte sales down by students and staff

1. From the **000** entity, click on the **Food Service** tab
2. From within the **Food Service** module, click on **Reports**
3. Click on the **Sales Activity Report**

I do have a template called XX: Daily Summary (where XX is my initials):
4. Highlight the template and click on **Edit**
5. Change the **Report Month** to the correct month
6. For the **Report Year**, make sure it's the current year
7. Click on **Save and Print**

I do not have a template called XX: Daily Summary (where XX is my initials)
4. Click on the **Add** button
5. Give the template a description of **XX: Daily Summary** (where XX is your initials)
6. Check the box to **Share with other users**
7. Set the **Report Month** to the month you want to report n
8. If necessary, change the **Report Year** to the appropriate year
9. Click on **Save and Print**

Sample Report:

| | STUDENT ACCOUNTS | | | | | ADULT ACCOUNTS | | | | Non- | | Computed | Computed |
Day of Month (A)	Receipts (B)	Web Receipts (C)	Reimbursable (D)	A la Carte (E)	Refunds (F)	Receipts (G)	Web Receipts (H)	Sales/Charge (I)	Refunds (J)	Reimb. Cash Sales (K)	Misc. Sales (L)	Bank Deposits (N)	Total Receipts (O)
8	8.50	10.00	29.90	2.00	0.00	10.00	0.00	7.40	0.00	0.00	0.00	18.50	28.50
9	616.25	0.00	39.65	1.20	0.00	20.00	0.00	7.40	0.00	0.00	0.00	636.25	636.25
10	177.00	0.00	47.70	0.00	0.00	27.95	0.00	7.40	0.00	0.00	0.00	204.95	204.95
11	63.00	20.00	55.20	0.80	0.00	40.00	0.00	11.50	0.00	0.00	0.00	103.00	123.00

(48) Daily Charge/Credit Report

This document is typically for the Food Service director and provides instruction on how to view Payments and Purchases, along with whether the customer's account was debited or credited.

Note: The report can be run with customer detail, or with totals only. You can also run it for individual cafeterias

Sample Report with Detail:

NAME	PAYMENTS	PURCHASES	CHARGES	CREDIT
, Danielle R.	0.00	2.50	-2.50	
ouan, David L.	0.00	2.75	-2.75	
Wyatt J.	0.00	2.50	-2.50	
Payton C.	0.00	2.50	-2.50	
Alexander T.	0.00	0.40	-0.40	
r Lopez, Diego	0.00	0.40	-0.40	
r, Jimena M.	0.00	0.40	-0.40	
der, Andrew J.	20.00	2.75		17.25
der, Wade M.	0.00	0.40	-0.40	
on, Briana A.	40.00	3.50		36.50

Sample Report with Totals only:

	PAYMENTS	PURCHASES	CHARGES	CREDIT
********** TOTAL FOR 09/08/2015 ********	5,499.25	1,223.90	-603.55	4,878.90

To run the report:
1. From the **000** entity, click on the **Food Service** tab
2. In the **Food Service** module, click on **Reports**
3. From the **Reports** menu, click on **Daily Charge/Credit Report**

I do have a template called XX: Daily Charges/ Credits (where XX is my initials):
4. Highlight the appropriate template and click on **Edit**
5. Change the **Date of Purchases/Payments** Low and High Dates to the dates you want to report on
6. From **Report Type**, select whether you want to see **Totals** or **Details**
7. Click on **Save and Print**

I do not have a template called XX: Daily Charges/Credits (where XX is my initials):
4. Click on the **Add** button
5. Give the template a Description of **XX: Daily Charges/Credits** (where XX is your initials)
   - **Note**: if you want to run the reports separately for each building, including the building code/name in your description

6. Check the box to **Share with others**
7. Set the **Date of Purchases/Payments** Low and High Dates to the dates you want to report on
8. From **Report Type**, select whether you want to see **Totals** or **Details**
9. **If** you're going to run the report by individual cafeterias, uncheck the All Cafeteria Codes checkbox. Otherwise, skip to **step 13**
10. Click on the **Cafeteria** button
11. Select the individual cafeterias you want to report on
    - **Note**: if you have multiple lines in a building, you can choose individual lines or all lines in the building
12. Click on **Save**
13. Click on **Save and Print**

(49) Daily Activity Report

The Daily Activity Report provides a summary of all meals/ala Carte items purchased on a selected day/date range. It provides a lot of duplicate information throughout the report and can be difficult to read. Furthermore, it does not break down ala Carte purchases by customer type. All ala Carte sales are lumped together, so you can't tell if it's an adult or student free/reduced/paid purchase

Unless you use the Daily Activity Report for a specific purpose, you might want to run **(34b) RESA FS Daily Summary** in place of the Daily Activity Report. It provides only the summary information you need and includes payment information as well

(50a) FS Alerts-Batch Updates – FS Director

This document is for Food Service directors and covers the FS Alert at the top of their screen and what it does

FS Alert	FS Alert

Explanation: when students make purchases and/or payments, this information will appear immediately in his/her account. However, the information won't appear on certain reports, or in Family Access, until utilities are run to update them. You will always want to make sure these updates are run before sending notices out. They are automated to run at a designated time every day. You will also have the ability to run the utilities manually whenever needed

If you see the alert at the top of your screen, it means that there are Purchases and/or Payments in a batch, or unfinished' state. If you wait**,** the utilities will automatically run and 'finalize' the transactions at your setup time. If you need to manually run them:

If you're in the POS and exit it, you'll get the following prompt. You can choose to update now or wait until later if you're not yet done with the meal
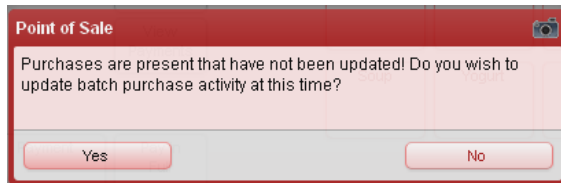
If you click on this prompt, you'll get the following
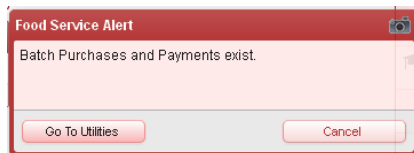
Saying **Yes** to the above prompt, or clicking on **Go To Utilities** both take you to this screen:

Note: these utilities should be run from the **000** Entity

To update Payments:
1. Click on **Batch Update of Payments**
2. Select your **Update Payments** template
3. Click on **Run**
4. On the **Request Complete** screen, click on **Back**

To update Purchases:
1. Click on **Batch Update of Purchases**
2. Select your **Update Purchases** template
3. Click on **Run**
4. On the **Request Complete** screen, click on **Back**

You can also click on the **FS Alert** link, which will also take you to the Update Utilities

(50b) FS Alerts- 411

This document is for anyone wondering why they sometimes see a red FS Alert link at the top of their Skyward screen:

FS Alert

Note: you will only see this Alert if you have permissions to run the utilities to update payments/purchases, or if you have system-wide access

Explanation: when students make purchases and/or payments, this information will appear immediately in his/her account. However, the information won't appear on certain reports, or in Family Access, until utilities are run to update them. You will always want to make sure these updates are run before sending notices out. Each district has these utilities automated to run at various times throughout the day. Food Service directors (or anyone else with permissions to do so) can also manually run them as needed. If a parent were to call and ask why they can't see their student's transactions for that day, it may be because the utilities have not yet been run.

(51a) Student Barcode Labels for Food Service

This document is for anyone that needs to print student barcodes by teacher for the cafeteria. This report is used to print a list of students by homeroom teacher and is used primarily in the elementary cafeteria line, where students come down by teacher

There are separate instructions in this document depending on whether the Food Service director prints these or if they're printed by someone at the individual buildings, such as cashiers or office staff

Note: in order to be able to print barcodes by teacher, a number of things must be in place. Homerooms have to be set up, room numbers assigned, teachers assigned to the room numbers, room numbers assigned to courses, and an automated utility runs to assign students to the appropriate homeroom. If any of these pieces changes and all other areas aren't updated, the process may no longer work and you may not see all the students list for the correct teacher. If not, refer to **(59b) Homeroom Information Office Staff Needs to Know** or **(59a) Setting up Homerooms for Food Service and Destiny**

If someone in an individual building is printing these (for example – cashiers or office staff):
1. Click on the **Food Service** tab at the top of your screen
2. From the **Reports** menu, near the very bottom, expand **Print Bar Codes**
   - **Note**: there are two directories in here called Print Bar Codes. If you don't see the option under it to Print Customer Barcodes, you're in the wrong one
3. Click on **Print Customer Barcodes**

I do see the template I want to use to print barcodes:
Note: steps 5– 21 only need to be completed the first time you're printing these for the new school year
4. Highlight the template and click on **Edit**
5. Make sure the **Student/Staff Status** option is set to **Active**
6. Make sure the option to **Print Teacher, Room Number & Grade** is **checked**
7. Make sure the option for **All Name Types** is **unchecked**
8. Click on the **Name Types** button
9. Verify that only **Students** is checked
10. Click on **Save**
11. Under the **Bar Code File Options**, **Print Report** should be set to **No**
12. From the **Customer ID to Use** dropdown, **Other ID** should be selected
13. **VERY IMPORTANT**! For **Increment Bar Code #,** this should always be <mark>NO</mark>. If you change this to Yes and Print the barcodes, you will be changing every students barcode number in the system and their cards will no longer work in the cafeteria
14. Under the **Form Options** section, the **File Format** option should be set to **Barcode Report**
15. For **Labels Used**, **Avery 5160** should be selected
16. Click on the **Sort** button
17. Only **Homeroom** should be checked
18. Click on **OK**
19. Click on the **Page Break** button
20. Only **Homeroom** should be checked
21. Click on **Save**

22. If there are grades in the **Grade/Grad Yr Low** or **High** fields, make sure they're correct for the students/grades you're printing the barcodes for
23. Click on **Save and Run**

I do not see the template I want to use to print barcodes:
4. Click on **Add**
5. Give the template a **Description** that will let you know exactly what this template is for, starting with your initials. **Example**: BK: 3rd Grade Barcodes
6. If you're printing the barcodes for a particular grade level, enter the range in the Grade/Grad Yr Low and High fields. Example, if I only want them for 1st through 3rd grade, the Low would be 01 and the High would be 03
7. Set **Student/Staff Status** to **Active**
8. **Check** the box to **Print Teacher, Room Number & Grade**
9. **Uncheck** the box for **All Name Types**
10. **Click** on the **Name Types** button
11. **Check** the box for **Students** and click on **Save**
12. From the **Print Report** dropdown menu, select **No**
13. Click on the **Sort** button
14. Check the box for **Homeroom**
15. Click on **OK**
16. Click on the **Page Break** button
17. **Check** the **Homeroom** checkbox
18. Click on **Save**
19. Click on **Save and Run**

If the Food Service director is printing these:
1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Reports**
3. From the **Reports** menu, near the very bottom, expand **Print Bar Codes**
   - **Note**: there are two directories in here called Print Bar Codes. If you don't see the option under it to Print Customer Barcodes, you're in the wrong one
4. Click on **Print Customer Barcodes**

I do see the templates I want to use to print barcodes:
Note: these steps only need to be completed the first time you're printing these for the new school year. After the first time you can just highlight the template and click on Run
5. Highlight the first template you'll be printing and click on **Edit**
6. Make sure the **Template Description** is representative of what this template is for, starting with your initials. **Example**: BK: Millside Student Barcodes, or BK: 9th Grade Students only
7. If your template description indicates it's for a particular building, is this what you see in your Entity Low and High values? If you don't know the entity numbers of particular buildings, refer **to (02) District Codes and Utilities – your district**
8. If your template has values in the Grade/Grad Yr fields, are they correct for the particular template you're running?
9. Check that the following are set correctly:

- **Student/Staff Status** = Active
- **Print Label with Sort Parameter Info** = Unchecked
- **Print Teacher, Room Number & Grade** = Checked
- **All Schools** = Checked (assuming you are using Entity Low and High values to get only the building you want)
- **All Name Types** = Unchecked
- **Name Types** button – should only include Students
- **Print Report** = No
- **Increment Bar Code #** = NO. This is VERY important. If you say Yes to this, you'll end up changing everyone's barcode number and they will no longer work
- **File Format** = Barcode Report
- **Labels Used** = Avery 5160 or Compatible

10. Click on the **Sort** button
11. If printing more than one school, check the **Entity** box first, followed by **Homeroom**
12. Click on **OK**
13. Click on the **Page Break** button
14. Check both **Entity** and **Homeroom**
15. Click on **Save**
16. Click on **Save and Run**

I do not see the templates I want to use to print barcodes:
5. Click on **Add**
6. Give the **Template Description** a name that is representative of what this template is for, starting with your initials. **Example**: BK: Millside Student Barcodes, or BK: 9th Grade Students only
7. If your template description indicates it's for a particular building, enter the entity number in the Entity Low and High values
   - **Note**: if you don't know the entity numbers of particular buildings, refer to **(02) District's Codes and Utilities – your district**
8. If you're running this for a particular grade level, enter the grade in both the Grade/Grad Yr High and Low fields
9. Set the following:
   - **Student/Staff Status** = Active
   - **Print Label with Sort Parameter Info** = Unchecked
   - **Print Teacher, Room Number & Grade** = Checked
   - **All Schools** = Checked (assuming you are using Entity Low and High values to get only the building you want)
   - **All Name Types** = Unchecked
   - **Name Types** button – should only include Students
   - **Print Report** = No
   - **Increment Bar Code #** = NO. This is VERY important. If you say Yes to this, you'll end up changing everyone's barcode number and they will no longer work
   - **File Format** = Barcode Report
   - **Labels Used** = Avery 5160 or Compatible
10. Click on the **Sort** button
11. If printing more than one school, check the **Entity** box first, followed by **Homeroom**

12. Click on **OK**
13. Click on the **Page Break** button
14. Check both **Entity** and **Homeroom**
15. Click on **Save**
16. Click on **Save and Run**

(51b) Set Customer Barcode Numbers to Zero

This document is for anyone with system-wide access, or for the Food Service director. It would be used when student barcodes stop working in the cafeteria line because someone inadvertently changed student barcodes when running the Barcode Report **(51a).** This utility will set all barcodes back to the correct number
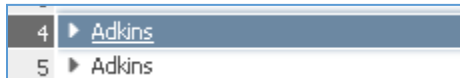
Explanation: in the **(51a) Student Barcode Report** there is an option, when running it, to increment barcode numbers. Sometimes, when users don't get the results they're looking for, they select Yes to increment barcode numbers thinking this might be their solution. However, selecting this option and clicking on Run will change all student barcodes, the result being that no one's barcodes will work in the cafeteria

1. From the **000** entity, click on the **Food Service** tab
2. From within the **Food Service** module, click on **Setup/Utilities**
3. From the Utilities menu, click on the **Set Customer Barcode Numbers to Zero**
4. Highlight the Skyward template for **All Entities, All Customers, All Cafes** and click on **Process**
5. If barcode numbers were not changed, and that isn't the cause of your issue, you'll get a message that **No records were found to process**. If this is the case, something else is going on, so call the RESA for assistance. If there were barcodes that were changed:
6. Click on **Preview Data to Process**
7. This will produce a list of students affected. Just click on the Back button
8. Click on **Run the Update**
9. When prompted if you're sure, click on **OK**
10. You don't need to review the report. If it opens, you can just close it. Otherwise, click on **Back**

(52) Viewing Student Contact Information in Skyward Food Service

This document is for the Food Service director and shows how to view student contact information. This would typically be done to obtain names and phone numbers if the director needed to call the student's parent.

1. Click on the **Food Service** tab
2. Under the **Payor/Customer Maintenance** section, click on **Customers**
3. Locate a student whose contact information you wish to see
4. With the name highlighted, you will see the name is underlined

5. Click on the underlined name, which will bring up the student's profile information, which includes contact information

Note: if the name is not underlined, you don't have the permissions you need. Contact the person in your district responsible for giving Skyward permissions and have them give you the appropriate permissions

(53) Item Master

This document is for Food Service directors and shows how to change prices from one year to the next, create/clone/update/deactivate items in the Item Master, as well as how to add them to the POS screen:

- An explanation of some of the components that are found in the item setup
- Important Notes on Creating/Changing Items in the Item Master
- What different types of items should look like in the Item Master
- Cloning existing ala Carte items to create a new ala Carte item (recommended)
- Creating a new ala Carte item from scratch
- Cloning an existing Breakfast/Lunch item to create a new Breakfast/Lunch item (recommended)
- Creating a new Breakfast/Lunch item
- Creating items that are reimbursable but only served at one building level. Example: elementary only
- Adding Items to the POS Screen
- Changing prices from one year to the next
- Deactiving/deleting items that are no longer used

An explanation of some of the components that are found in the item setup:
When you create a new item, it's important to know which options to check, based on the type of item you're creating

☑ Government Funded
☑ Use Lunch Code
☑ Use Price Category

- **Government Funded**: only check this if you're creating a reimbursable meal item
- **Use Lunch Code**: only check this if you need to be able to report on this item based on whether a free/reduced/paid student or an adult purchased the item. If you're creating a reimbursable meal, you'll want this option checked. The only time I can think of that you wouldn't use this is if it's an ala carte item. When you check it, it's going to create the item with a separate line for D, F, G, H, O, P, R, S, V
- **Use Price Category**: check this if students at the elementary level pay a different rate than at the secondary level. When you check this, it's going to create the item with a separate line for Ele D, G, H, O, P, R, Sec D, G, H, O, P, R and a S and V lunch code. If you don't need to be able to differentiate between elementary vs secondary purchases, or if it's only offered at one level, don't check this box

Important Notes on Creating/Changing Items in the Item Master
VERY IMPORTANT: any time you've added/changed items in the Item Master, you'll want to go into the FS POS to see if it loads. If you did anything wrong in the Item Master that the system doesn't like, you'll get an error and won't be able to open the POS. This is not something you want to discover when cashiers are trying to log in for breakfast…..

Note: you can't complete the process of creating a new item in the Item Master if the FS Alert link is at the top of your screen. Therefore, you should not attempt to make changes whenever meals are in progress. Wait until after breakfast or lunch is done, run the update utilities, and then add the item.

What different types of items should look like in the Item Master
What an ala Carte item should look like when everyone pays the same price for it:

▼ Item Detail	Add Item Detail									
		Lunch Code	Price Category	Gov't Funded?	Limit	Price Effective	Expense	First Price	Second Price	Report Group	Report Group 2
▶ Edit Add Price Delete				no	0	01/01/1900	0.00	0.75	0.00	ALA	

What an item should look like if you need to report on whether a free/reduced/paid student or adult purchased the item, but it doesn't matter if they're at the elementary or secondary level: Price Category is not selected in this option

▼ Item Detail	Add Item Detail									
		Lunch Code	Price Category	Gov't Funded?	Limit	Price Effective	Expense	First Price	Second Price	Report Group	Report Group 2
▶ Edit Add Price Delete		D		yes	1	01/01/1900	0.00	0.00	0.00	B	2B
▶ Edit Add Price Delete		F		yes	1	01/01/1900	0.00	0.00	0.00	B	2B
▶ Edit Add Price Delete		G		yes	1	01/01/1900	0.00	0.00	0.00	B	2B
▶ Edit Add Price Delete		H		yes	1	01/01/1900	0.00	0.00	0.00	B	2B
▶ Edit Add Price Delete		O		yes	1	01/01/1900	0.00	0.00	0.00	B	2B
▶ Edit Add Price Delete		P		yes	1	01/01/1900	0.00	0.00	0.00	B	2B
▶ Edit Add Price Delete		R		yes	1	01/01/1900	0.00	0.00	0.00	B	2B
▶ Edit Add Price Delete		S		no	0	01/01/1900	0.00	0.00	0.00	AL	
▶ Edit Add Price Delete		V		no	0	01/01/1900	0.00	0.00	0.00	AB	

What an item should look like if students are charged a different rate based on lunch code, AND based on whether they're elementary or secondary: both Lunch Code and Use Price Category were selected here

	Lunch Code	Price Category	Gov't Funded?	Limit	Price Effective	Expense	First Price	Second Price	Report Group	Report Group 2
▶ Edit Add Price Delete	S		no	0	08/07/2014	0.00	3.00	0.00	AL	
▶ Edit Add Price Delete	V		no	0	08/07/2014	0.00	3.00	0.00	AL	
▶ Edit Add Price Delete	D	ELE	yes	1	09/03/2015	3.04	0.00	2.10	L	2L
▶ Edit Add Price Delete	F	ELE	yes	1	09/03/2015	3.04	0.00	2.10	L	2L
▶ Edit Add Price Delete	G	ELE	yes	1	09/03/2015	3.04	0.00	2.10	L	2L
▶ Edit Add Price Delete	H	ELE	yes	1	09/03/2015	3.04	0.00	2.10	L	2L
▶ Edit Add Price Delete	O	ELE	yes	1	09/03/2015	3.04	0.00	2.10	L	2L
▶ Edit Add Price Delete	P	ELE	yes	1	09/03/2015	0.34	2.10	2.10	L	2L
▶ Edit Add Price Delete	R	ELE	yes	1	09/03/2015	2.64	0.40	2.10	L	2L
▶ Edit Add Price Delete	D	SEC	yes	1	09/03/2015	3.04	0.00	2.25	L	2L
▶ Edit Add Price Delete	F	SEC	yes	1	09/03/2015	3.04	0.00	2.25	L	2L
▶ Edit Add Price Delete	G	SEC	yes	1	09/03/2015	3.04	0.00	2.25	L	2l
▶ Edit Add Price Delete	H	SEC	yes	1	09/03/2015	3.04	0.00	2.25	L	2L
▶ Edit Add Price Delete	O	SEC	yes	1	09/03/2015	3.04	0.00	2.25	L	2L
▶ Edit Add Price Delete	P	SEC	yes	1	09/03/2015	0.34	2.25	2.25	L	2L

What an item should look like if you need to report based on Secondary vs. Elementary, but it doesn't matter what the student lunch code is: if you use this option, any adult that has an Elementary price category would pay 1.00, whereas any adult with a Secondary price category would pay 1.25. I can't really think of an example of why you would use this option…

▼ Item Detail   Add Item Detail

	Lunch Code	Price Category	Gov't Funded?	Limit	Price Effective	Expense	First Price	Second Price	Report Group	Report Group 2
▶ Edit Add Price Delete		ELE	no	0	01/01/1900	0.00	1.00	0.00	ALA	
▶ Edit Add Price Delete		SEC	no	0	01/01/1900	0.00	1.25	0.00	ALA	

To add an ala Carte item:
Typically, for an ala Carte item, every consumer pays the same amount for the item - regardless of whether they're a student or an adult, or if they're free or reduced, or if they're at the elementary or secondary level. When you create a new ala Carte item you can either Clone an exisiting ala Carte item or you can create one from scratch. When you Clone it, it saves you the step of having to add the Report Group

Cloning an existing ala Carte item:
1. Click on the **Food Service** tab
2. In the Purchases module, click on **Item Master**
3. **Highlight** an existing ala Carte item
4. On the right-hand side of the screen, click on the **Clone** button
   - **Note**: if you don't have the Clone button, contact the person in your district responsbile for giving permissions. Tell them you need the following changed in the FS Director security group: Product Setup>Skyward Contact Access>Security Groups>Web Student Management>000>FS Director>Edit Security Levels>Select Menu Path>Food Service/Purchases/Item Master: needs 5/5 access

5. The top of the screen provides information on the item you're clonging from. Don't change anything here. In the **Item to Be Created** section, enter an **Item code**, **Short Description** and **Long Description**. Use the item you're cloning (at the top) to get an idea of what to enter in these fields
   - **Note**: the Short Description is what will display on the button in the POS

6. Click on **Save**
7. Expand the new item and expand the **Item Detail** section
8. If the **First Price** needs to be changed (because it used the price from your cloned item), click on **Add Price**

In this example, my new item actually costs $.75...

9. If needed, change the **Effective Date** to the date you want this price to take effect
10. **ChangePrice** 1 to .75 (in this example)
11. Click on **Run**
12. **Repeat** for any remaining ala Carte items you need to add
13. Once all items have been added, cilck on the **Food Service** tab and select the **POS**. As long as you don't get an error that there's a problem with the Item Master, you're good to go. Just back out of the POS and proceed to the next step
14. Once all items have been added, refer to the section in this document on **Adding Items to the POS Screen**

Creating a new ala Carte item:

1. Click on the **Food Service** tab
2. In the **Purchases** module, click on **Item Master**
3. On the right-hand side of the screen, click on the **Add** button
4. Give the item an **Item Code**, **Short Description** and **Long Description**
5. Set the **Item Type** to **ala Carte**
6. **Uncheck** all checked boxes

7. Click on **Save and Update First Detail Record**
8. Set the **Price Effective Date** to the date this price should take effect
9. For **First Price**, enter the cost of the item
10. For **Report Group**, select **ala Carte**

11. Click on **Save**
12. **Repeat** for any remaining ala Carte items you need to add
13. Once all items have been added, cilck on the **Food Service** tab and select the **POS**. As long as you don't get an error that there's a problem with the Item Master, you're good to go. Just back out of the POS and proceed to the next step
14. Once all items have been added, refer to the section in this document on **Adding Items to the POS Screen**

Cloning an existing Breakfast/Lunch item to create a new Breakfast/Lunch item (recommended) where students pay a different price at the elementary than those at the secondary level

Examples of when you would Clone/Create a meal item: in most districts, there's 1 reimbursable Lunch item and 1 reimbursable Breakfast item in the Item Master. However, you may have the need to create a special item to be used for a particular scenario and you need to be able to report this item separately, or report it with a different cost. It can also be used when you have different lunch stations and want to identify what meal was served. Example: you might have a Salad Bar lunch button and a Sandwich Central lunch button and want to know how much of each item was purchased

In my example below, the district is serving all students a free breakfast on Count Day. They still need to know how many free/paid/reduced students got the meal, but they don't want to charge anyone for it

1. Click on the **Food Service** tab
2. In the **Purchases** module, click on **Item Master**
3. Highlight an existing Breakfast/Lunch Item – depending on which item you're creating
4. On the right-hand side of the screen, click on the **Clone** button
   - **Note**: if you don't have the Clone button, contact the person in your district responsbile for giving permissions. Tell them you need the following changed in the FS Director security group: Product Setup>Skyward Contact Access>Security Groups>Web Student Management>000>FS Director>Edit Security Levels>Select Menu Path>Food Service/Purchases/Item Master: needs 5/5 access
5. The top of the screen provides information on the item you're clonging from. Don't change anything here. In the **Item to Be Created** section, enter an **Item code**, **Short Description** and **Long Description**. Use the item you're cloning (at the top) to get an idea of what to enter in these fields
   - **Note**: the Short Description is what will display on the button in the POS

6. Click on **Save**
7. Expand the new item and expand the **Item Detail** section
8. If the **First Price** needs to be changed (because it used the price from your cloned item), click on **Add Price.** In my example, I used the regular Breakfast item and cloned it to make a free breakfast button that will be used on Count Day. The regular breakfast option had costs for reduced and paid students, so I need to change these to 0.00
9. Enter a **Price Effective Date** for the date you want to use this item
10. **Price 1:** in my example, this would be 0.00 for all students
11. **Price 2**: if the student were to (maybe accidentally) be served a 2nd breakfast, what should they pay for the 2nd breakfast?
12. Click on **Run**
13. **Repeat** for any other prices that need to be changed

What it looked like when I first cloned it:

Edit Add Price Delete	O	ELE	yes	1	07/23/2014	0.00	0.00	1.25	B	2B
Edit Add Price Delete	P	ELE	yes	1	07/23/2014	0.00	1.25	1.25	B	2B
Edit Add Price Delete	R	ELE	yes	1	07/23/2014	0.00	0.30	1.25	B	2B

What it looks like after I made price changes:

Edit Add Price Delete	O	ELE	yes	1	07/23/2014	0.00	0.00	1.25	B	2B
Edit Add Price Delete	P	ELE	yes	1	10/01/2015	0.00	0.00	1.25	B	2B
Edit Add Price Delete	R	ELE	yes	1	10/01/2015	0.00	0.00	1.25	B	2B

Creating a new Breakfast/Lunch item where students pay a different price at the elementary than those at the secondary level

There's a lot of work involved in adding a new reimbursable item from scratch. I recommend that you take an existing breakfast/lunch item and clone it. When you do this, everything is already set up for you. All you have to do is change the first and second prices where applicable. See instructions above on how to clone meals

Creating items that are reimbursable but only served at one building level. Example: there's a GSRP program at the elementary level. Only elementary students would be served this meal. Therefore, I don't need to include lunch codes at both the elementary and secondary levels, so I can exclude the option for Price Category

1. Click on the **Food Service** tab
2. In the **Purchases** module, click on **Item Master**
3. On the right-hand side of the screen, click on the **Add** button
4. Give the item an **Item Code**, **Short Description** and **Long Description**
5. Set the **Item Type** to the appropriate meal type
6. **Uncheck** Use Price Category

7. Click on **Save and Update First Detail Record**
8. Look at the **Lunch Code** on this record. In this case, it's D (which is free)
9. Because this is a reimbursable meal, you want to have the **Government Funded** box checked
10. **Limit** would be **1**. Meaning that the student can get 1 reimbursable meal. After the 1st one, additional meals for this student would not be considered reimbursable
11. In my example, the meal is free to all GSRP students, so the **First Price** would be 0 for all Students
12. Because students in the GSRP program would not be getting a 2nd meal, the **Second Price** can be left at 0 as well
13. **Report Group** would be set to Lunch
14. **Report Group 2** would be set to 2nd Lunch
15. Click on **Save and Edit Next Detail**

16. **Repeat** for all remaining student lunch codes
17. Once you get to the **S (Staff) and V (Visitor)** lunch codes, you'll select some slightly different options:

Item Detail Maintenance

Item: GSRL   GSRP Lunch
Lunch Code: S   Staff
Price Category:

☐ Government Funded   ☐ Use Sales Tax
Limit: 0
Price Effective Date: 01/01/1900   Expense: 0.00
First Price: 3.00   Second Price: 0.00

* Report Group: AL ▼ Adult Lunch
Report Group 2: ▼

18. **Uncheck** the **Governement Funded** box
19. The **Limit** would be **0**, as there's no limit to the number of meals a staff member can get at the entered rate
20. Set the **First Price** according to what the staff member would pay for this item. In my example, some districts don't charge the teacher for the GSRP meal, so this price might be 0. In other examples, it might not be
21. Set **Report Group** to **AL – Adult Lunch**. There won't be a **Report Group 2** for adults, as no matter how many of this item someone buys, they'll all be report as an Adult Lunch
22. Click on **Save and Edit Next Detail**
23. **Repeat** for the **Visitor** lunch code
24. Click on **Save**
25. Once all items have been added, cilck on the **Food Service** tab and select the **POS**. As long as you don't get an error that there's a problem with the Item Master, you're good to go. Just back out of the POS and proceed to the next step
26. Once all items have been added, refer to the section in this document on **Adding Items to the POS Screen**

Adding Items to the POS Screen
Any time you add new items to the Item Master, you'll need to then add them to the appropriate POS registers

1. Click on the **Food Service** tab
2. In the **Purchases** module, click on **Item Master**
3. On the right-hand side of the screen, click on the **Touch Screen** button
4. Highlight the appropriate register you want to add the new items to
5. Click on **Edit**
6. Click on **Select/Sort Items**
7. Check the boxes for the new items you want to add to this register
8. If you want to reorder how they appear on the screen, click on the directional arrow to the left of the item and drag it to where you want it

9. Click on **OK**
10. Click on **Save**
11. **Repeat** for any other registers you need to add the new items to
12. Click on **Back**

Changing prices from one year to the next

If meal or ala carte item prices change from one year to the next you'll need to go into the Item Master and change them. This can be done anytime after the year-end rollover is completed but needs to be done prior to the new school year starting

1. Click on the **Food Service** tab
2. In the **Purchases** module, click on **Item Master**
3. Expand the item that needs to have the price changed
4. Expand the **Item Detail**
5. You'll see a list of all records for this item, which could be just 1 if it's an ala carte item, up to 23 if it's a reimbursable meal. Look at the existing prices and click on **Add Price** for the first one that needs to be changed

This is what my Lunch item looked like prior to making any changes:

	Lunch Code	Price Category	Gov't Funded?	Limit	Price Effective	Expense	First Price	Second Price	Report Group	Report Group 2
▶ Edit Add Price Delete	S		no	0	07/23/2014	0.00	3.25	0.00	AL	
▶ Edit Add Price Delete	V		no	0	07/23/2014	0.00	3.25	0.00	AL	
▶ Edit Add Price Delete	D	ELE	yes	1	07/23/2014	0.00	0.00	2.25	L	2L
▶ Edit Add Price Delete	F	ELE	yes	1	07/23/2014	0.00	0.00	2.25	L	2L
▶ Edit Add Price Delete	G	ELE	yes	1	07/23/2014	0.00	0.00	2.25	L	2L
▶ Edit Add Price Delete	H	ELE	yes	1	07/23/2014	0.00	0.00	2.25	L	2L
▶ Edit Add Price Delete	O	ELE	yes	1	07/23/2014	0.00	0.00	2.25	L	2L
▶ Edit Add Price Delete	P	ELE	yes	1	07/23/2014	0.00	2.25	2.25	L	2L

In my example, Lunch increased by .25 for all customer types.

6. For **Staff** and **Visitor** lunch codes, add the new **Price 1** and click on **Run**

Item Pricing Maintenance

Current FS Dates: 07/01/2015 - 06/30/2016

Item Pricing

Run

Back

* Price Effective Date: 10/01/2015

Price 1: 3.50

Price 2: 0.00

7. Once processing has completed, click on **Back** (if given the option)
8. Click on **OK** (if given the option)
9. Click on **Back** (if given the option)
10. **Repeat** the process for the student lunch codes, based on whether it's the elementary or secondary level

	Lunch Code	Price Category	Gov't Funded?	Limit	Price Effective	Expense	First Price	Second Price	Report Group	Report Group 2
Edit Add Price Delete	S		no	0	10/01/2015	0.00	3.50	0.00	AL	
Edit Add Price Delete	V		no	0	10/01/2015	0.00	3.50	0.00	AL	
Edit Add Price Delete	D	ELE	yes	1	10/01/2015	0.00	0.00	2.50	L	2L
Edit Add Price Delete	F	ELE	yes	1	10/01/2015	0.00	0.00	2.50	L	2L
Edit Add Price Delete	G	ELE	yes	1	10/01/2015	0.00	0.00	2.50	L	2L
Edit Add Price Delete	H	ELE	yes	1	10/01/2015	0.00	0.00	2.50	L	2L
Edit Add Price Delete	O	ELE	yes	1	10/01/2015	0.00	0.00	2.50	L	2L
Edit Add Price Delete	P	ELE	yes	1	10/01/2015	0.00	2.50	2.50	L	2L
Edit Add Price Delete	R	ELE	yes	1	10/01/2015	0.00	0.30	2.50	L	2L

For each Lunch Code at each Price Category level, the First Price indicates what that Lunch Code would pay for their first meal. The Second Price indicates what that Lunch Code would pay for the meal if they got a 2nd one

11. **Repeat** the process for any remainig items that need their prices changed
12. Once all items have been updated, cilck on the **Food Service** tab and select the **POS**. As long as you don't get an error that there's a problem with the Item Master, you're good to go. Just back out of the POS and proceed to the next step

Deactiving/deleting items that are no longer used

When the year end process has been run, all transactions are purged from Food Service. As a result, there are no records tied to any of the items in the item master. You can either delete them from one year to the next, or, if you want to maintain a record of the item, you can deactivate it

To delete it:
1. Click on the **Food Service** tab
2. In the **Purchases** module, click on **Item Master**
3. **Highlight** the item no longer used
4. On the right-hand side of the screen, click on **Delete**
   - **Note**: if you don't have the Clone button, contact the person in your district responsbile for giving permissions. Tell them you need the following changed in the FS Director security group: Product Setup>Skyward Contact Access>Security Groups>Web Student Management>000>FS Director>Edit Security Levels>Select Menu Path>Food Service/Purchases/Item Master: needs 5/5 access
5. When prompted to confirm, click on **Yes**

To deactivate it:
1. Click on the **Food Service** tab
2. In the **Purchases** module, click on **Item Master**
3. **Highlight** the item no longer used
4. On the right-hand side of the screen, click on **Edit**
5. Check the box for **Discontinued Item**
6. Click on **Save**

Note: if you were to go into the Item Master Touch Screen and look at the items on a particular register, you would still see the Discontinued Item listed and checked here. However, when the cashier goes into the POS, the item will no longer appear

(54) POS Configuration Options

This document is for Food Service cashiers and covers the POS Configuration Options that need to be set up for each cashier and for each building s/he has access to
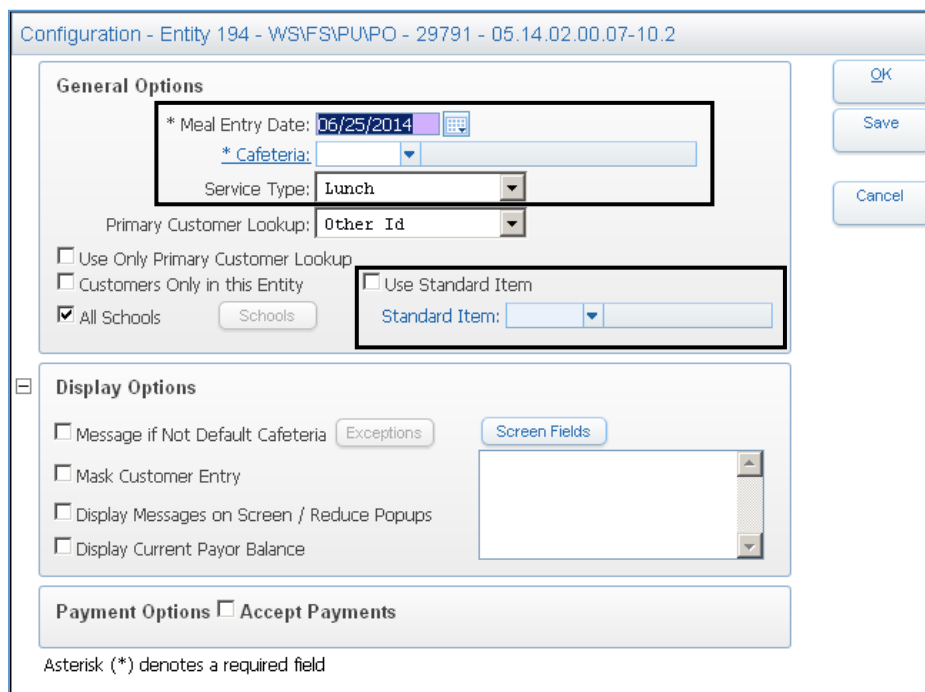
The first time you log into a building's POS, you receive the following message. All new cashiers would get this, as well as any cashier that has not already configured the POS for a particular building:
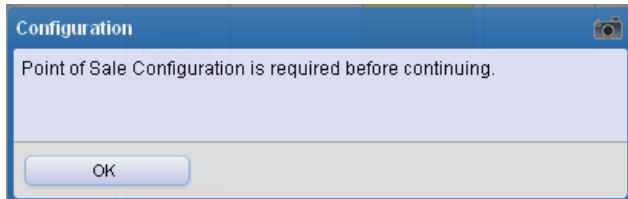
If you click on OK, it will take you to the Configuration screen. If you just need to get into the screen and didn't get the message, from within the POS, click on the Configure button:

This is a sample of the screen you'll see, along with an explanation of areas that need to be configured:

Meal Entry Date: this will default to today's date and is the date your purchases will be recorded. If you need to ring up purchases for a different day, change the date here

Cafeteria: even though the link says "**Cafeteria**", you actually want to select your **Line** here. All Lines end in 1, 2, 3, unless there is only 1 line in a building. Then, the Cafeteria may just say Elementary, for example

Service Type: this determines which items will display on your POS. If you're serving lunch, this should say lunch. If you do both breakfast and lunch, you need to change this between meals

Use Standard Item: this is an auto serve item, which, if checked, will automatically serve every customer the selected item. This would be used when the majority of the customers coming through a particular line get Breakfast/Lunch. It saves you from having to press the Breakfast/Lunch button for every customer. If someone comes through the line that is not getting Breakfast/Lunch, simply remove the item from their account

Note: when serving Breakfast, you can check this box and select Breakfast from your Standard item. When you switch to Lunch, you'll want to uncheck this box if you don't want to Auto-Serve Lunch. If you do, change the Standard Item to Lunch. If you change the Service Type to Lunch, but leave the Standard Item as Breakfast, you'll be automatically serving Breakfast to all students

---

Save vs. **OK**:
Scenario 1: I make some changes in my configuration and click on Save. Next time I go into the POS, whatever changes I made will still be in effect

Scenario 2: I make some changes in my configuration and click on OK. These changes are only good for as long as I'm in the POS. Once I exit out and go back in, the previous settings will be in effect

When would I use one over the other?
If you're auto-serving Breakfast, but not Lunch, set your Service Type to Breakfast, check the box to Use Standard Item, and set the Standard Item to Breakfast. When it's time to serve Lunch, go into Configuration, change the Service Type to Lunch and uncheck Use Standard Item. Click on **OK**. When you come in tomorrow to serve Breakfast, it's all configured, as you didn't Save the Lunch settings

---

This is an example of what your screen should look like if you've selected a line (EL1)
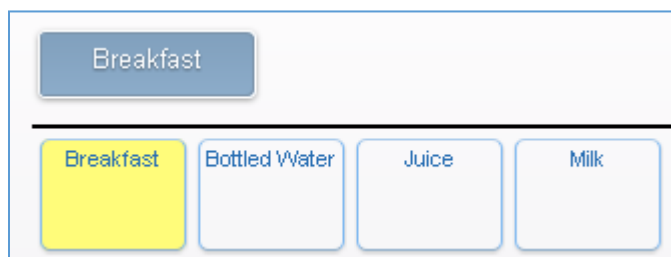
If your POS screen looks something like the screenshot below, where you see all breakfast and lunch items combined, you've selected the building level cafeteria instead of the line. This needs to be corrected in the configuration

You shouldn't ever have need to change these options, but in case you accidently do, here is what they should be set to:

Primary Customer Lookup: this should be 'Other ID'

Use Only Primary Customer Lookup: this should NOT be checked

Customers Only in this Entity: this should NOT be checked

All Schools: this SHOULD be checked

Message if Not Default Cafeteria: this should NOT be checked

Display Current Payor Balance: this should be checked

Use Red Font if Negative or Below Amount: this should be checked

Open text box: this should be 0

Low Balance Message: should be set to **Do Not Display Message**

Payment Options Accept Payments: this should be checked

Amount Tendered Default: this should be set to Zero

Amount Applied Default: this should be set to Amount Tendered

Screen Fields button: the following should be selected:
- Birthdate
- Current Activity
- Customer Picture
- Grade level
- Item Prices
- Lunch Code Alias

- Maintain Key Pad
- Other ID
- Previous Activity

(55) Messages you get in the POS System

This document is for Food Service cashiers and covers some of the common messages that come up in the POS. It's **VERY** important that the cashiers read the messages and understand what it is they're saying Yes or No to

This message means that you've selected a student who is not currently enrolled in the district. While this could be something incorrect in the student's enrollment record, verify first that this is the correct student. If Yes, make note of the student so that his enrollment record can be looked at. If No, try again...

Point of Sale

Zackary Joseph Audette has an Inactive Status.

Do you want to continue?

Yes   No
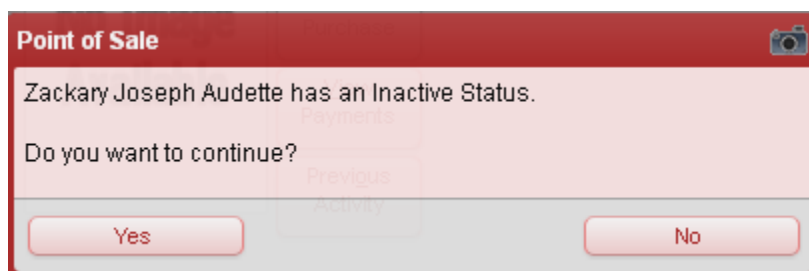
This message means that you've selected a student who is not only inactive, but doesn't have a Food Service record either. Verify that this is the correct customer, but most often it is not

Point of Sale

Customer record (Thomas Abdou) was not found.

Do you wish to create a customer record?

Yes   No
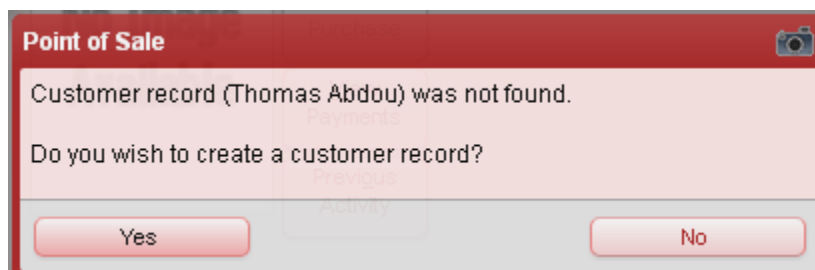
This message comes up when a customer name is on the screen but nothing was served and no payment was made. It's really just an FYI asking if you really did mean to not serve him anything

No Customer Purchase

No purchases were made for the current customer.

Are you sure you want to continue?

Yes   No
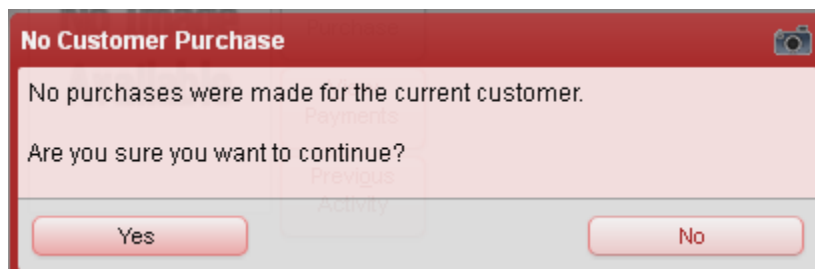
You'll get this message if you try to exit the POS while a customer name is on the screen. You must first click on Change Customer to clear the name before you can exit

Point of Sale 📷

Please click the 'Change Customer' button to end the current customer transaction.

OK
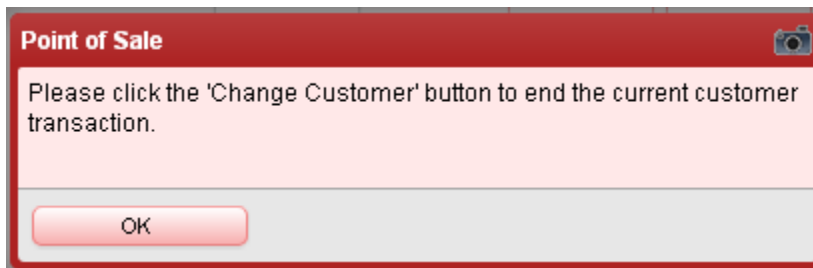
A Wanding Message is a message put on an individual student's account. It comes up as soon as the name is brought up in the POS, regardless of what the student is trying to do. With Wanding Messages, the cashier still has the ability to do what the message says not to do, so it's important to pay attention to what this message says

Point of Sale 📷

Wanding Message(s): No Charging

Do you want to continue?

Yes   No
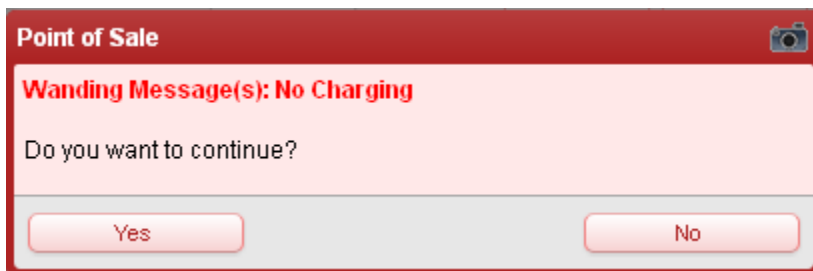
A Permanent Stop Purchase message is set for individuals and comes up as soon as the customer's name is brought up. The only option is OK, and nothing can be served to this student. Any time you click on an item, this message comes back up

Point of Sale 📷

A Permanent Stop Purchase option is set for Jaylyn Lee Abrams. Purchases are not allowed.

OK

A Permanent Stop ala Carte purchase message, when set for an individual, comes up as soon as the cashier clicks on an Ala Carte item. The only option is OK. Meals can be served, but any ala Carte item will produce this message
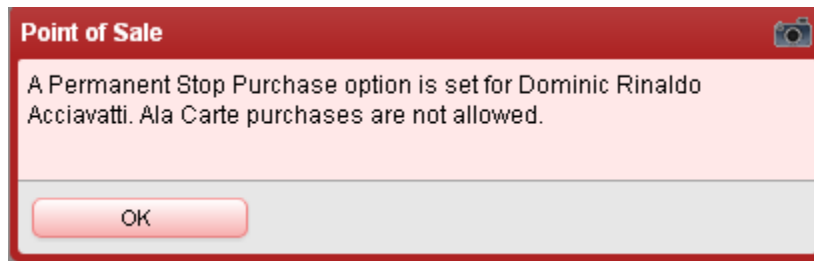
Sometimes, when typing a name in the purple text box on the POS screen, the Item Master screen will pop up. I'm not sure of all the scenarios that will cause this to happen, but some examples are: you don't type enough letters for the customer's name or you enter other text the system doesn't recognize. If the Item Master screen pops up, just click on Back to close it. This is what it looks like:

(56a) Reconciling Cash Drawer Between Meals

This document is for cashiers in districts where they reconcile their cash drawers, and do so after breakfast and after lunch

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Skyward's Food Service is not designed to allow the reconciliation of cash drawers between meals – only 1 time after lunch is done. Follow this process to reconcile between meals

Breakfast person:
1. Once breakfast is done, count your cash drawer and subtract your starting amount (if any)
2. Enter your remaining amount in the **(44a) Sales Activity Report** and run it
3. Use **(56c) Recording Daily Drawer Balances** to record the amount you recorded in step 2, as well as whether you were under/over/balanced

Lunch person:
1. Once Lunch is done, count your cash drawer and subtract the amount the Breakfast person recorded on the spreadsheet (if the money was left in the drawer), as well as the starting cash drawer amount (if any). Look at **(56c) Recording Daily Drawer Balances** sheet from Breakfast to see whether or not the drawer was balanced
2. Enter your remaining amount in the **(44a) Sales Activity Report** and run it
3. Read the report to see how much you're off. Because you can only see your own entry, it's going to say you're off by at least the same amount the Breakfast person recorded, which is why you need to know what their amount was. Any difference is what you yourself are off.

Example:
Breakfast actually rang up that they took in $41, but only had $40 in the drawer (after subtracting beginning balance). The Sales Activity Report would show that they were short $1.

```
****GRAND TOTAL****                        41.00
**DEFICIT DEPOSIT**                         1.00-
```

It would be recorded on **(56c) Recording Daily Drawer Balances** like this (Lunch record is also shown here):

U/O/B = Under/Over/Balanced

In Drawer	U/O/B	Should be
40	-1	41

Lunch actually rang up that they took in $57, and had $57 in the drawer (after subtracting based on step 1 above), so that's what is recorded in the Sales Activity Report. However, when the report is run, it's going to say that the Lunch person is short $41 dollars, which is the amount the Breakfast person should have had in their drawer

```
****GRAND TOTAL****                                      98.00
**DEFICIT DEPOSIT**                                      41.00-
```

However, when the FS director runs the 'Master Sales Activity Report', s/he's going to see the 2 combined totals for that line and see that altogether, the line was $1 short:

```
CASHIER NAME              ALPHAKEY    PAYMENT DATE REF CAFE  DEPOSIT AMT  ITEM TYPE LUNCH CODE/ITEM        QUANTITY  SALES AMT    TENDERED AMT  PAYMENT AMT
Fordt, Collene            FORDTCOL000 04/21/2015   1   MH1     40.00
Humphrey, Julie           HUMPHJUL000 04/21/2015   1   MH1     57.00
                                                                         Lunch     DC                      0        0.00         57.00         57.00
                                                                                   Paid                    0        0.00         41.00         41.00
                                                                                   **ITEM TYPE TOTAL**     0        0.00         98.00         98.00

                                                                                   **CAFETERIA TOTAL**     0        0.00         98.00         98.00
                                                                                   **DEFICIT DEPOSIT**                                         1.00


                          **TOTAL OF ALL CAFETERIAS BY DAY**
                          04/21/2015                                      **DAY TOTALS**                    0        0.00         98.00         98.00
                                                                          **DEFICIT DEPOSIT**                                                  1.00

                                                                          ****GRAND TOTAL****                                                  98.00
                                                                          **DEFICIT DEPOSIT**                                                  1.00-
```

(56b) Reconciling Cash Drawer After Lunch Only

This document is for cashiers in districts where they reconcile their cash drawers, and do so only after lunch

Skyward's Food Service is not designed to allow the reconciliation of cash drawers between meals – only 1 time after lunch is done. Follow this process to reconcile 1 time – after lunch only. If switching cashiers between meals, use the documentation for **(56a) Reconciling Cash Drawer Between Meals**

Lunch person:
1. Once Lunch is done, count your cash drawer and subtract the beginning balance (if any)
2. Enter your remaining amount in the **(44a) Sales Activity Report** and run it
3. Read the report to see if/how much you're off

Example:

```
****GRAND TOTAL****                          41.00
**DEFICIT DEPOSIT**                           1.00-
```

Your Food Service director can now run a **(44b)** 'Master' report to see the status of all cash drawers for the day

(56c) Recording Daily Drawer Balances

Print and use the 2nd page of this document when cash drawers are balanced between meals, and where one cashier rings up breakfast and another rings up lunch

Example scenario: the breakfast cashier counts out her cash drawer and, after subtracting the beginning balance, has $40. She then runs the Sales Activity Report, which shows she's under $1

This is how it would be recorded:

Date	Breakfast In Drawer	U/O/B	Should Be
9/20	40	-1	41

Why?

If breakfast money is taken out of register and is not part of lunch's starting balance:
When the lunch cashier runs her sales activity report, it's going to show that she's short $41. Without knowing that the breakfast cashier rang up payments of $41, the lunch cashier won't know if she's actually short or not.

If breakfast money is left in the drawer and is used in the lunch drawer:
When the lunch cashier runs her sales activity report, and assuming she's actually balanced, it's going to show she's short $1. She needs the information recorded above to know that it wasn't her drawer that was short

Date	In Drawer	U/O/B	Should Be		Date	In Drawer	U/O/B	Should Be

(57) Customers vs. Payors

This document is for anyone that wants to know the difference between Food Service Customers and Food Service Payors, as well as where you add/update what. There's a separate document, **(67a) Data Mining Food Service Report Options,** which provides information on where you can find different Food Service reporting fields

In Skyward's Food Service, there is a **Customers** section and a **Payors** section, each of which provide different information on a student's Food Service account. This document covers some of the differences, as well as where you go to add/change information

Customers: in customers, you can see/record/change the following information:

Purchases

Payments
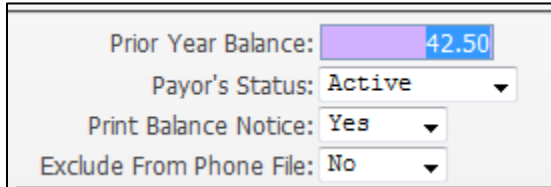
Cafeteria, Key Pad Number, Stop Purchase settings and Wanding Messages

From the Customers module, you can also highlight a student, click on the Quick Print button and print a meal statement for that customer

Payors: Payors is where applications are processed. Just like in Customers, you can also see Payments from this module, but not Purchases

If you Edit a customer's record, you also have access to the following:

Prior Year Balance:	42.50
Payor's Status:	Active
Print Balance Notice:	Yes
Exclude From Phone File:	No

If a customer shows as Inactive but should be Active you can change it here

If notices aren't printing for certain customers, it could be that the Print Balance Notice flag is set to No here. When a faculty record is created, this field is set to No, which means they won't ever get the balance notices. That's why it's a good idea to run the utility to (20) Sync Payor Status Audit at the end of each month

(58) Screenshots from within Skyward

This document is for any Skyward user that wants to take a screenshot, from within Skyward, of something they're seeing. It could be something that they want to document for later, or something they need to ask someone a question on

Explanation: if you are doing something within Skyward and something occurs that you don't know what to do about, or if you want it for future reference, you can take a quick screenshot of the screen. When you click on the camera icon, it will put the screenshot in your print queue, where you can review it at a later time (up to 2 days later), or print it right then and there

1. On the screen that you want to take a screenshot of, click on the camera icon in the corner of it
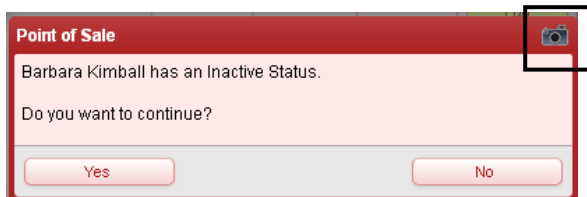
2. On the **Request Processing** screen, you can either open the screenshot now or review it later:
    - **Now**: wait for it to finish processing and click on **View Report**. The screenshot of whatever you took a picture of will open in Adobe Reader. You can print it out or save it to your hard drive
    - **Later**: click on **Back.** When you're reading to review it (up to 2 days later), click on My Print Queue in the upper right-hand corner of your Skyward screen
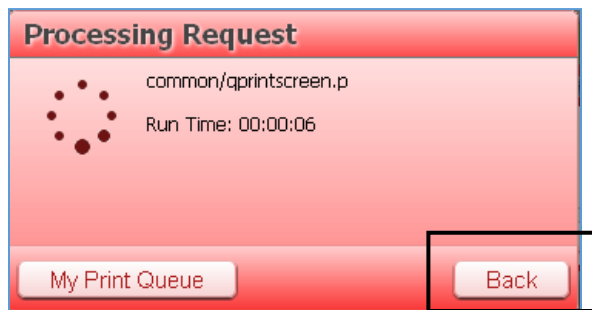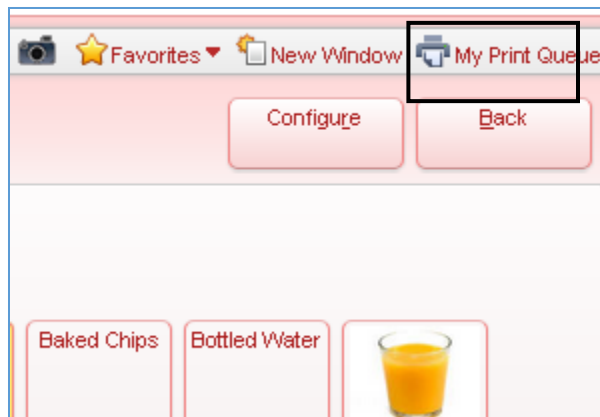
3. Highlight the **Print Screen** option and click on **View**
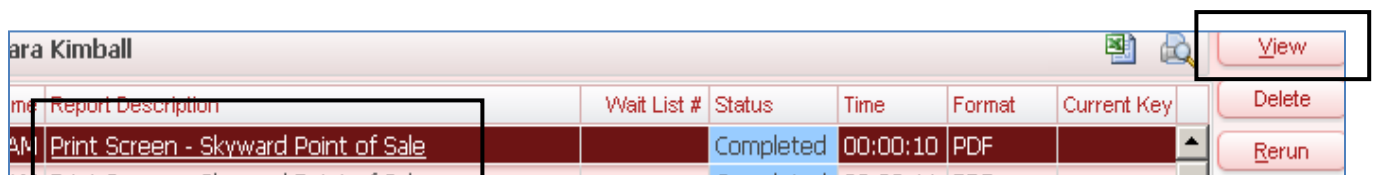
You can now print, save or close the screenshot

(59a) Setting up Homerooms for Food Service and Destiny

This document is for the person in your district that has permissions to run utilities and to create codes. Typically, this will be the person in charge of creating permissions and/or building office staff. It covers what needs to be done to make Food Service (where used) and the Destiny library software (where used) to function properly. The process is primarily used at the elementary level, and only needs to be done for elementary teachers/classes.

Explanation: in order for certain areas of Food Service to work – Barcodes by Teacher and Purchase Entry by Homeroom – as well as being able to bring up Homerooms in the Destiny library system, Homerooms need to be set up in Skyward. This is not the traditional Homeroom course students are scheduled in and go to first thing in the morning. It's more of a behind the scenes setup used for other purposes.

There are various parts to setting up these Homerooms, and a change in any one of them can impact the others, causing Homerooms not to be assigned properly. Once set up and working, it's very important not to make any changes to the areas referenced below without changing all related areas as well

Note: some of this may already have been set up – especially for previous phase districts. However, you should still go through **ALL** the steps to make sure all the information is accurate for the current school year

Steps involved:
- Creating/Editing/Deleting Room Numbers where needed
- Creating Homeroom Codes
- Assigning the Homeroom Codes to teachers' 1st period classes
- Running a Utility to assign the homerooms
- Automating the Utility to assign the homerooms
- Let your office/scheduling staff know what time the automated utility runs. If a student changes teachers, the scheduling person may also need to change the student's homeroom, depending on the timing of their changes and the utility running

Creating/Editing/Deleting Room Numbers:
1. From the individual entities, click on the **Office** tab
2. From **the Current Scheduling** module, click on **Setup/Codes**
3. Click on **Buildings**
4. Here you'll be able to see all buildings in your district and make and additions/corrections to each affected building from here. Expand the entity you'll be starting with
5. **Expand** the section for **Building Room Codes**
6. If your building uses actual room numbers – which aren't typically used at the elementary due to students not needing them on their schedules – make sure they're all listed in the Building Room Codes:
    - Yes, we use actual room numbers in our building and I see them all listed: **skip to the section on Creating Homeroom Codes**
    - Yes, we use actual room numbers in our building but I don't see them all listed: **create additional room numbers**

- No, we don't use actual room numbers in our building, but I see a bunch listed that don't really mean anything: **delete them**
- No, we don't use any actual room numbers in our building, and I don't see anything in the list: **create them**

Creating a Room Number:
From the Building Codes module, click on **Add a Room**:

Room Number:
We need to use actual room numbers to print them on schedules (example: 104): enter the room number in both the Room Number and Description field
We don't use actual room numbers: use the grade level and section number for each teacher as the room number. Example: **K-2** for kindergarten, section 2

Click on **Save**
Repeat for any remaining rooms. There needs to be a room number for every teacher whose students will either be eating or goes to the library with their primary teacher

Deleting a Room Number:
Just click on the **Delete** button to the left of the room number. If the room is in use you'll get an error that it cannot be deleted. Call the SIS office (455-1004) for assistance

Once you're done with the Room Numbers, click on the **Back** button

Creating Homeroom Codes
1. On the office tab of the individual entities, click on Current Scheduling/Setup/Codes/Homerooms
   - **Note**: if you're completing these steps all at the same time, you should already see the option for Homerooms on your screen
2. **Homeroom:** use the corresponding room number. Example: if you used a room number of 104, enter that as the Homeroom. If you used a room number of K-1, use that as the Homeroom
3. Select your **Building** number
4. Select the **Room** number
5. Select your **School** number
6. Assign the appropriate **Teacher** to this room number/grade level
7. Click on **Save**
8. **Repeat** for remaining Homerooms

Assigning the Homeroom Codes to teachers' 1st period classes
1. From the individual entities, click on the **Office** tab at the top of your Skyward screen
2. In the **Current Scheduling** module, under the **Build Course Master** section, click on **Section Master**
3. From the **Views** dropdown menu, select **Class Section Details**

4. Create a filter to show only 1st period classes:
    a. To the right of the Views dropdown menu, click on the word **Filters** (shown above)
    b. Click on **Add Filter**
    c. Give the filter a name of **1st Period Classes**
    d. In the **Column Display Options and Filters** section, enter an **a** for both the **Low** and **High Values** for the **S** row:

    e. For the **Dsp Prd** row, enter **01** for both the **Low** and **High Values**:

    f. **Uncheck** the Display checkbox for everything from S up to (but not including) Teacher:

5. In the upper right-hand corner of the screen, click on **Save and Apply Filter**. You should now only see courses that are scheduled for 1st period

Each 1st period course needs to have the appropriate room number (based on previous steps) associated with it.

If not:
6. Expand the course record
7. Expand the **Meet Details** section
8. To the left of the Meet information, click on the **Edit** link

9. Towards the bottom of the screen, enter the appropriate room number (based on earlier steps)

Running a Utility to assign the homerooms
1. From the individual entities, click on the **Students** tab
2. From the Students module, click on **Setup/Utilities**
3. Click on **Student Mass Change** (you're going to remove all homerooms first to make sure to remove any homerooms for inactive students)
4. When the **Report Ranges** screen pops up, click on **Save**
5. Click on **OK** to the message that **Values Entered are those to be Changed**
6. In the upper right hand corner, enter ********* in the **Current Value Homeroom**. Do not enter/change anything else

7. Click on **Run**
8. When prompted if you're sure, click on **Yes**
9. Once the report has generated/opened, close it
10. On the same Utilities screen you're already in, click on **Mass Assign Student Homeroom**

Do you see a template created by either RESA JOBS or Barb Kimball?
Yes: click on the Run button. Once the report has completed, open it. The report will indicate the number of Records Selected (the number of active students in your building) vs. the number of Records Assigned (the number of students that were assigned a homeroom). These numbers should be fairly close or there might be a problem with the Homeroom setup somewhere. All students that are scheduled in a first period course should be assigned a Homeroom. The difference in the numbers should be due to unscheduled students/students without a first period class/E grade students. If you have a large number of students without a homeroom, revisit the room numbers. If you can't figure out where the problem is, call the RESA SIS help desk for assistance. Close the report
No: Call the RESA SIS helpdesk to create and then automate the Homeroom utility

---

Automating the Utility to assign the homerooms: depending on permission levels, some users have the ability to automate tasks/utilities. In cases where the utilities need to be updated (with school year, grade…), the SIS office staff logs in as RESA JOBS and automates the utilities. That way we can make sure to update them from one year to the next during our year-end rollover. Even if you have the permission/knowledge to do so, please don't automate this Homeroom utility yourself.

Let your office/scheduling staff know what time the automated utility runs. If a student changes teachers, the scheduling person may also need to change the student's homeroom, depending on the timing of their changes and the utility running

(59b) Homeroom Information Office Staff Needs to Know

This document is for elementary building office staff members that would be adding/changing faculty schedule information. It explains how Homerooms are set up so that buildings know what kind of changes need to be made to the homeroom setup for various scenarios. This would apply to any districts using the Destiny library software, any buildings where barcodes are printed by teacher to use in the cafeteria line, any buildings that serve breakfast in the classroom, or any buildings with GSRP programs

At the time of this writing, Homerooms have been set up for all districts/buildings that need them. Going forward, the following changes would also require changes to the Homeroom setup:
- When a new grade level/section is added
- When the grade level/section a teacher is teaching changes
- When the person teaching a grade level/section changes

In order for Homerooms to be set up and to work properly, the following areas play a role. A change in any of these areas will cause the process to work if other areas are not changed as well:
- Building Room Codes
- Homeroom Codes
- Teachers' Association with a Homeroom
- The Homeroom Number in the Teacher's 1st period class
- Associating the Homeroom with Students

Building Room Codes: a room code must exist in each building for each teacher. At the elementary level, actual room numbers are not needed for schedule purposes, so they're typically created using a format of grade level-section. Example: K-1, 3-2…. If a new section is added to a grade level, the appropriate Room Code needs to be added. To do this:
1. From your individual entity, click on the **Office** tab
2. On the **Current Scheduling** module, click on **Setup/Codes**
3. Click on **Buildings**
4. Click the dropdown arrow to the left of your building
5. Under the **Building Room Codes** section, check to see if the appropriate grade section exists. In my **example**, I have a new 3rd grade teacher that has section 2
6. If the **Room Code** does exist, skip to the **Homerooms** section below, otherwise, click on **Add a Room**
7. For the **Room Number**, in my **example**, you would enter **3-2**
8. For the **Description**, in my **example**, you would enter **3-2**
9. Nothing else is needed. Click on **Save**

Homerooms: a homeroom must be setup/created any time a new grade level/section is added. To do this:
1. From your individual entity, click on the **Office** tab
2. On the **Current Scheduling** module, click on **Setup/Codes**
3. Click on **Homerooms**
4. Look to see if a **Homeroom Code** already exists for the **Room Code** you created in the previous step. In my example, I'm looking for a Code of 3-2
- **The Homeroom Code exists, but the teacher associated to it is wrong**:

- o Highlight the Homeroom and click on **Edit**
- o From the **Teacher** link, select the correct teacher
- o Click on **Save**
- o Skip to **The Homeroom Number in the Teacher's 1st period class** section
- **The Homeroom Code exists, and the teacher associated to it is correct**:
  - o Click on **Back**
  - o Skip to **The Homeroom Number in the Teacher's 1st period class** section
- **The Homeroom Code does not exist**:
  - o Click on **Add**
  - o Enter the *** Homeroom** number. In my **example**, it would be 3-2
  - o Select the **Building** number
  - o Select the **Room** number. In my **example**, it would be 3-2
  - o Select the **School** number
  - o Select the **Teacher**
  - o Click on **Save**
  - o Click on **Back**
  - o Skip to **The Homeroom Number in the Teacher's 1st period class** section

Teachers' Association with a Homeroom: if the Homeroom and Building codes were already setup, but the person teaching the grade level/section has changed, the association needs to be changed in the Homeroom Codes:
1. From your individual entity, click on the **Office** tab
2. On the **Current Scheduling** module, click on **Setup/Codes**
3. Click on **Homerooms**
4. Highlight the **Homeroom** code for the grade level/section the new teacher will be teaching, and click on **Edit**
5. Click on the **Teacher** link and select the new teacher
6. Click on **Save**
7. Click on **Back**

Assuming the Section Master has been updated to reflect the new teacher, and the Homeroom was already assigned, nothing more is needed

The Homeroom Number in the Teacher's 1st period class: when new grade levels/sections have been added, and the Room codes and Homeroom codes have been created, the Homeroom number needs to be associated to the new teacher's 1st period class. To do this:
1. From your individual entity, click on the **Office** tab
2. Under the **Current Scheduling** module, click on **Section Master**
3. Locate the new teacher's 1st period class
4. Click the dropdown to the left of the Course code
5. If necessary, exapnd the **Meet Details** section
6. Click on **Edit** to edit the **Meet Details**
7. Enter the **Room** number for the newly created Homeroom. In my example, it would be 3-2
8. Click on **Save**

Associating the Homeroom with Students: in districts that are already using this feature, a daily utility has been automated to assign a student to the correct homeroom. In some districts it's set up only for specific purposes. For example, a district uses Homerooms only for their GSRP program, so the utility is set up only for the GSRP class. If a new homeroom is created in a district where the utility is setup for a specific class, call the RESA SIS help desk (810-455-1004) to have the utility modified

(60a) Generate Customer Key Pad Numbers

This document is for the Food Service director and would be used in districts where 'short IDs' are used in the cafeteria line, and where they are randomly generated. This would not be used if students are manually assigned the last 4 (or 5) numbers of their Other ID

To randomly assign short IDs for Food Service:
1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Setup/Utilities**
3. From the **Utilities** menu, click on **Generate Customer Key Pad Numbers**

I do see a report template called XX: Assign Short IDs (where XX is my initials)
4. Highlight the template and click on Edit
5. Make sure, based on your template name, that the fields listed are correct. For example: my template is called KG IDs, but when I edit my template it shows a grade range of 01 to 01.
6. If everything looks okay, click on **Save and Process**
   - **Create For** should be **Student Customers Only**
   - **Status** should be **Active**
   - **Create New Key** should be **No**
7. When processing has finished, click on **Preview Data to Process**
8. You'll see a list of students that will get a random short ID. If anyone in the list should not get one, highlight the name and click on Remove Record
9. Click on **Back**
10. Click on **Run the Update**
11. When prompted if you're sure, click on **OK**
12. When the report has finished generating, click on **Back**

I do not see a report template called XX: Assign Short IDs (where XX is my initials)
4. Click on the **Add** button
5. Give the template of **XX: Assign Short IDs NNN** (where XX is my initials and NNN (if applicable) is the grade level or entity you're assigning IDs for
6. From the **Create For** dropdown menu, select **Student Customers Only**
7. If generating IDs for a particular entity, enter the **Entity** Low and High numbers
   - If you don't know the entity numbers, refer to **(02) District Codes and Utilities** for your district
8. If generating IDs for a particular grade-range, enter the grades in the Grade/Grad Yr Low and High ranges
   - If running for Kindergarten, use KG
9. Set **Status** to **Active**
10. **Create New Key** should be **No**
11. Click on **Save and Process**
12. When processing has finished, click on **Preview Data to Process**
13. You'll see a list of students that will get a random short ID. If anyone in the list should not get one, highlight the name and click on Remove Record
14. Click on **Back**
15. Click on **Run the Update**
16. When prompted if you're sure, click on **OK**

17. When the report has finished generating, click on **Back**

(60b) Food Service Short IDs

These instructions are for any of the following:
- **Enrollment secretaries**, if they're responsible for making a student's FS short ID the same as the last 4 numbers of the student's Other ID
- **Cashers**, if they are responsible for assigning short IDs through the POS
- **FS Directors**, if they are responsible for making a student's FS short ID the same as the last 4 numbers of the student's Other ID

Explanation: just like in Zangle, Skyward's Food Service allows customers to type in a 'short ID' in the cafeteria line. Students can then type, for example, a 4-digit short number instead of their 10-digit student ID. In Skyward, if the option is turned on to use short IDs, a number will be automatically assigned to any new students when they are enrolled into Skyward. The following sections show how the 3 different staff types listed above can change a student's short ID for Food Service

Note: if someone is already assigned the number you're trying to assign, you'll receive a message that it's already in use. This is because in some cases students do have Other IDs with the same last 4 numbers. In these situations the best practice is to not give the student a short ID, as the one assigned to them might end up being the last 4 digits of a future student's other ID

Enrollment Secretaries:
During the enrollment process, the user will be notified of the short ID associated with the student. If the district wants the short ID to be the last 4 numbers of the student's ID, the person enrolling the student will have to manually change it. **Note**: once assigned, the number can also be changed from within Food Service/Customers

Once you complete the enrollment process for a new student, you'll get the following prompt:
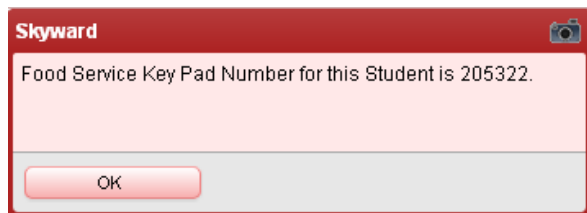
If this randomly generated short ID is acceptable, nothing more is needed other than conveying this information to the student. However, if the district wants the short ID to be the last 4 (or however many) of the student's ID, once this number is generated, it will need to be manually changed:

1. Click on **OK** to the message above
2. From within **Student Profile**, click on the **Food Service tab** on the left-hand side of the screen
3. Click on the **Edit** button to the right of the Key Pad Nbr:

4. Move the new screen so that you can see both the '**Other ID'** field on the Profile screen and still have access to the Key Pad Number field

5. Change the Key Pad Number to be the last 4 of the students ID. Leading zeroes are not necessary. In this case, you would change it to 796

6. Click on **Save**

Cashiers:

In order for cashiers to be able to do this, they'll need to click on the Configure button from within the POS. In the configuration screen, click on the Screen Fields button and click on the option for Maintain Key Pad. Once checked, click on **Save**

Scenario: a student comes through the line and types (what they believe to be) their Short ID on the Key Pad. However, either a different student comes up, or the ID is not found:

1. From with **Point of Sale**, with that student account up, you will see the student's **Other ID** at the top of the screen. Take note of the last 4 numbers:

Point of Sale [Cafe: ELE1]

Dflt Ent: **199 (1)** Grade Level: **01** Other ID: **520001221**
Birthdate: **08/12/2008** Std. Item: **BKFS**

2. On the screen you can click on the **Maintain Key Pad** button:

Maintain
Key Pad

3. This will bring up the **Maintain Key Pad Number** screen. Enter in the last 4 digits of the Other ID and click on **Save**

Maintain Key Pad Number

Key Pad Number: 1221 Random Generate

Note: If you get the following message, it means that someone else is already assigned that number – rightfully or not – and you can't use it for this student. Do not assign them a different short ID, as it might interfere with a new student's short ID

Point of Sale

Entered Key Pad Number is being used by a different customer. Action was cancelled.

OK

Food Service Directors:
1. Click on the **Food Service** tab
2. In the **Payor/Customer Maintenance** module, click on **Customers**
3. Highlight the student's name that needs to have a short ID assigned
4. Once the name is highlighted, you should see that it's underlined. Click on the name again
   - If the name isn't underlined, contact the person in your district responsible for assigning permissions
5. When you click on the underlined name, another window will pop up. Near the middle of the screen you'll see a section that shows the Student ID. Take note of the last 4 numbers

Student Id: **145005248**
Internal Id: **2209**
Status: **Active**

6. In the upper right-hand corner, click on **Back**
7. With the student's name still highlighted, click on the **Edit** button
8. Change the **Key Pad Number** field to the last 4 digits of the student ID
9. Click on **Save**

(60c) Key Pad Numbers Report

This document is for whoever has the need to run a report of students' Food Service short IDs. It includes instructions on running the report alphabetically by student by building, or running it by teacher if the report will be given to the teachers to give to the students

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To run the report alphabetically by student name:
1. From the **individual entities**, click on the **Food Service** tab
2. From within the **Food Service** module, click on **Reports**
3. Click on **Key Pad Numbers** Report

I do have a report called XX: Key Pad # by Name (where XX is my initials)
4. Highlight **XX: Key Pad # by Name** and click on **Print**

I do not have a report called XX: Key Pad # by Name (where XX is my initials)
4. Click on **Add**
5. Check the box to **Share with other users**
6. From the **Report On** dropdown menu, select **Student Customers Only**
7. From the **Status** dropdown menu, select **Active**
8. Click on **Save and Print**

Sample:

NAME	CUST TYPE	ENT	SCH	CAFE	GRAD YEAR	ADVISOR	HMRM	STATUS	PAD NBR
Stephanie G.	Student	412	412	MCH	2018			Active	755973
Jaylyn L.	Student	412	412	MCH	2016	HENRYKIM000		Active	122183
ti, Dominic R.	Student	124	124	GE	2024	ROEHRDAN000	3-2	Active	842618

To run the report sorted by homeroom:
- **Note**: in order for this option to work, Homerooms must have been set up in Skyward for either Food Service barcodes or the Destiny library software
1. From the individual entities, click on the **Food Service** tab
2. From within the **Food Service** module, click on **Reports**
3. Click on **Key Pad Numbers** Report

I do have a report called XX: Key Pad # by Homeroom (where XX is my initials)
4. Highlight the report and click on **Print**

I do not have a report called XX: Key Pad # by Homeroom (where XX is my initials)
4. Click on **Add**
5. Check the box to **Share with other users**
6. From the **Report On** dropdown menu, select **Student Customers Only**
7. From the **Status** dropdown menu, select **Active**

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8. Click on the **Sort** button in the upper right-hand corner
9. In the **Sort Fields** section, check the box for **Homeroom**
10. In the **Page Break Fields** section, click on the box for **Homeroom**
11. Click on **OK**
12. Click on **Save and Print**

(61a) Giving Staff Access to their own FS Account Information

This document is for the person in your district that creates Skyward permissions and walks through creating a permissions group as well as assigning users to the group in order for staff members to be able to see their own Food Service account information

In order for staff to view their Food Service information, a security group must be setup, and users must be added to the group:

1. In **Product Setup/Skyward Contact Access/Security Groups/Web Student Management**
2. Select the **000** Entity from the dropdown menu
3. Click on the **Add** button to add a new permissions group
4. Call the group **FS Staff Account Information** and **Save** it
5. Click on **Edit Security Levels**
6. From the **Select Menu Path** dropdown menu, select **WA – Web Applications**
7. Click the dropdown arrow next to **EP – Educator Access Plus**
8. Click the dropdown arrow next to **FS – Food Service**
9. Check the box next to **MF – My Food Service Information**
10. Click on **Assign Selected**
11. Set the **Security Access Level** to **1 – Inquire Only**
12. Set the **Security Lookup Level** to **1 – Inquire Only**
13. Click on **Apply**
14. Click on **Back**
15. With the FS Staff Account Information security group highlighted, click on the **Users** button
16. Expand the records displayed to 200
17. Click on **Select All Users**

18. If there are more than 200 users, click the next arrow to go to the next screen.
19. Click on **Select All Users** and repeat until you get to the end of the list
20. Click on **Save**

For any new staff members, you will need to add them to this permissions group once you create their Staff record

(61b) How Staff Can View Their Own FS Account Information

This document is for district staff and shows how they can access their own Food Service account information. The process is slightly different for teachers than it is for office staff

Note: in order to see your own information, permissions need to have been created and assigned to staff members. How this is viewed is slightly different for Teachers and Office Staff

For teachers:
Once logged into Skyward, you will see a Food Service tab at the top of your screen. If you do not see this tab, contact your System Administrator, as you do not have permissions to see this
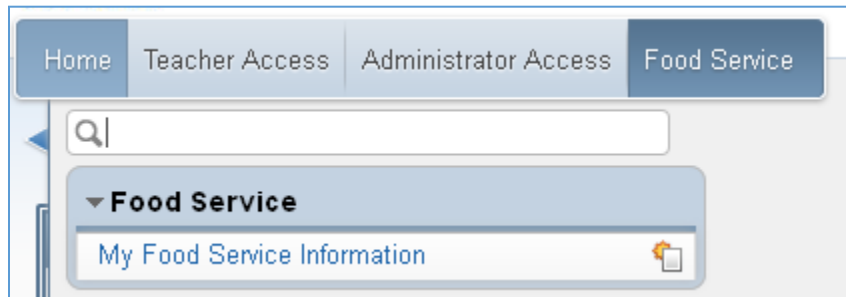
For office staff:
Click the dropdown arrow to the right of the Home tab and select **Educator Access Plus**
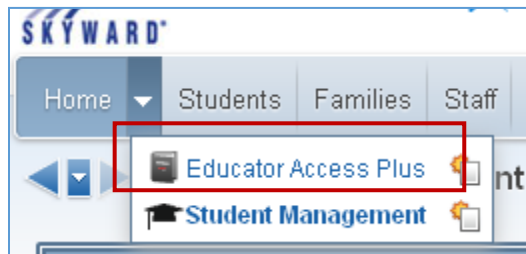
You will now see a tab for Food Service
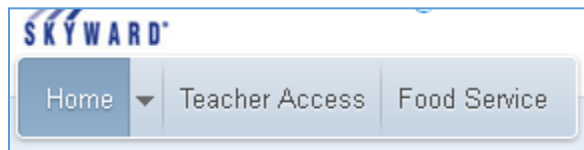
(62a) Food Service Tasks and When to Perform Them

Below is an overview of Food Service tasks along with when they should be done. It's a general overview, so some areas may not apply to your district. Depending on the district, all of these tasks are performed by the FS director, where, in others, they may be performed by multiple staff members. There is corresponding documentation on how to perform all of these tasks/obtain this information

Daily:
(24c) Report Lunch Survey Results – **where applicable:** in districts where teachers record lunch choices, run this report to see your meal counts for Lunch

(44b) Master Sales Activity Report – **where applicable**: this is the report you run that shows all lines and whether they were under, over or balanced

(19) Change Customer Purchase Cafeteria – **where/when applicable:** in districts where 1 cafeteria feeds multiple buildings, and where all transactions are rung up under 1 cafeteria, run this utility to separate the purchase transactions for reporting purposes. Also used to correct purchases that were rung up under the wrong cafeteria

If **(19) Change Customer Purchase Cafeteria** was run, run **(42) Reports by Payor, Customer, School** to get a breakdown of payments by school

(34b) RESA FS Daily Summary Report: this is a RESA custom-created report to use in place of some of Skyward's reports. This particular one replaces the Skyward Accuclaim report. It's similar to Zangle's Daily Food Service Summary and is found on the **Custom Reports tab/Reports/RESA FS Daily Summary**.

Weekly:
**(13)** **Optional: Change Payor Balance Notice Indicator utility**: run this for any Staff members who have 'Print Notices' set to No, which means negative balance notices won't print for them. This utility will change the option to Yes

(14) **Optional:** Send **Payor Balance Notices:** these are the negative balance notices for students/staff owing money
- **Note**: before printing Payor Balance Notices, you should clear any **(50a) FS Alerts**

(37d) Record GSRP Meals – **where applicable**: provides instruction on how to record GSRP meals

(37c) Print Rosters for Purchase Entry by Homeroom – **where applicable**: if someone marks off on a sheet which GSRP students ate, you can print a screenshot of the Purchase Entry by Homeroom for that person to use as a check off sheet. It then matches up with the meal entry screen, making it much easier to record

Monthly – data cleanup tasks

These tasks should be completed before running Monthly Summary Report and before submitting claim for reimbursement:

(20) Sync Payor Status Audit: this utility updates the Active/Inactive status for Food Service Customers. If a student exits the district, their FS record may still be active. Running this utility will inactivate any students without an active enrollment record, which helps clean up your Food Service data and reports
Who, in my district, will be performing this task? _____

(39) **Optional: Remove 2nd Quantity Purchases**: this utility is usually run for the elementary students, as they don't typically get a 2nd breakfast or lunch. You can be selective on a building and/or grade range. You'll see a Preview screen before it actually processes, which will also allow you to eliminate individual students
Who, in my district, will be performing this task? _____

(40) Remove ALL Purchase Records without Purchases: run this utility to clean up purchase records with a 0 quantity. This helps clean up your data
Note: before running this, you have to clear the **(50a) FS Alerts** if transactions need to be updated
Who, in my district, will be performing this task? _____

(46) Price Category Audit: run this to update incorrect student Price Categories. Students quite often have the wrong Price Category, which will cause them to be charged the wrong amount in the cafeteria line
Who, in my district, will be performing this task? _____

(21) RESA FS Application Lunch Code Errors: this document provides instruction on running a report in order to see if there are any issues with the data that's been entered in any current year applications. It should be run after processing a number of applications, before monthly reimbursement claims are submitted, and before the Verification process is started
Who, in my district, will be performing this task? _____

(22) RESA FS Customer Control vs. Application: in Skyward's Food Service, there are 2 different areas that have a customer's Lunch Code: one is the Application, the other is the Customer Control Record. When an Application is created, it's supposed to create a CCR with the same date/Lunch Code, but this doesn't always happen. Conversely, there are some processes that take place that update the Customer Control Record, but this doesn't always update with the right information. This report will show any issues where, among other things, the Application Lunch Code is not the same as the Customer Control Record Lunch Code. This report should be run prior to submitting your claim for reimbursement so that any issues can be addressed beforehand
Who, in my district, will be performing this task? _____

(17) Update Student Default Cafeterias: run this to assign students to the appropriate cafeteria if the student has moved from one building to another
Who, in my district, will be performing this task? _____

Monthly: run these reports monthly, after performing the cleanup tasks above, to obtain the information you need for your reimbursement claim

(34a) RESA FS Monthly Summary Report: this is a RESA custom-created report to use in place of some of Skyward's reports. This particular one replaces the Skyward Accuclaim report. It's similar to Zangle's Monthly Food Service Summary and is found on the **Custom Reports tab/Reports/RESA FS Monthly Summary**.

- **Note**: In order to hide the transaction details you'll need to have the **(34c) Crystal Viewer** installed on your computer. It should be run with Details on, and saved to your network drive every month. This is the information you'll possibly need for future audits

(33) Lunch Code Totals by Day Report: run this to get your student eligibility count for the month

(35) RESA FS Reimbursement Summary by School: provided you gave SIS Team your reimbursement rates per school, you can run this report to verify it against your reimbursement claim. It will tell you, by school, what you should be getting from your reimbursement claim, as well as the numbers to report

(37e) Report GSRP Meals: use this to get a monthly total of GSRP student purchases

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As available: **(08h) Import Direct Cert file**
- **Best Practice**: when you get your list of DC students, it's not a bad idea to look at the students that were already free /reduced from an application this year and pull their Food Service Application. Because they are now DC, you shouldn't have their app in with your current apps. Example: in September, a student submitted an application that resulted in him being Income Eligible free (F). When you run the DC process, you'll get a list of students that were affected. Anyone that has a current year app with a Lunch Code of F, G, O or R is no longer eligible for Verification and their application can be pulled from your file

End of September/beginning of October:
- Send out **(04a) Expiring Letters**
- 30 day expiration process will be run by the RESA the night before students go back to full-pay

October:
- It's **Verification** time!
  - Refer to the **(07) Verification Guide** for steps on running your verification
- Run the **(33) Lunch Code Totals by Day** report to get your Free/Reduced counts for October 31st
- Provide, to your MSDS submission person, a list of students that became **(08) Free/Reduced Eligible After Count Day**

November: Verification must be completed by November 15th

January: submit your LEARS report on Verification results

February:
Provide, to your MSDS submission person, a list of students that became **(08) Free/Reduced Eligible After Count Day**

Application Related Tasks
- **Once per year**: Update all exiting letters and templates before sending any out
  - Refer to the **(03) Application Guide**
- **As needed**: Process applications
  - Refer to **(03a) What Information is Needed for Which Types of Applications** to refresh yourself
- **As needed**: **(03d) Print application letters**

Before leaving for the year:
Refer to **(62b) Year End Tasks for Food Service Directors**

Before the new school year starts:
Refer to **(62c) Year Start Tasks for Food Service Directors**

(62b) Year End Tasks for Food Service Directors

This information is for the Food Service director, or whoever runs the reimbursement reports/student meal statement reports

In Zangle, the RESA would archive your data at the end of every school year so that we could produce reports for you in subsequent years if needed. A common example of this would be when parents called to ask why their student owed money. We could go many years back and view Food Service transactions and run reports. However, with Skyward, data cannot be archived, and FS transactions are purged at the end of every year. As a result, you'll need to run, and save, any reports that you might need in future years. It's not a good idea to print these reports out, as they can be thousands of pages long. If you save them to a network location, they can be accessed by anyone that needs them in future dates. Make sure you save them to a location on your network that's backed up. If you save them to your computer's hard drive, and something happens to the hard drive, all data might be lost. If you're not sure what gets backed up in your district, ask your IT person

Reports you should run and save:
1. **(51a) Payor-Customer Meal Statement**: these are the notices that are sent to parents when they question a student's account. It's a good idea to create a template for year-end that includes ALL customers, regardless of whether or not they have a negative balance. That way, you have a record of all transactions for every customer. You could also create 3 separate ones for Negative/Zero/Positive balances.
   - **Note**: you do not want to print these notices out. If you have an electronic copy, you can then do a keyword search when a particular parent calls, which you can print off just for that student. The RESA is currently looking into options for saving specific pages to a separate report to email
2. **(34a) RESA FS Monthly Summary**: you'll want to run this report for every month and save it to a location on your server that's backed up. If you're not sure what gets backed up, ask your IT person where you can save them to. When you run this, don't hide the details before saving it. If you have to run reports (like for a later audit), you'll need to refer back to these reports
   Very Important: make sure you run these reports using an Export Method of RPT

3. **(33) Lunch Code Totals by Day**: you should run this report, effective the last day of the month, for each month, with Student Names included. This will give you the ability to determine Free/Reduced eligibility at a later date

4. **(15) Payor Balance Summary**: run this report as of 6/30 (or your last day there) to obtain a list of all balances for accounting purposes

5. Any other reports you have a need to reference in future years

(62c) Year Start Tasks for Food Service

The following is for whoever in your district performs these particular tasks:

☐ Email SIS Team with the 30th operating day of the school year. On the 31st day, all students will revert to Paid if they have not filled out a new application
Completion: ASAP

☐ If you're using the **(35) RESA FS Reimbursement Summary by School** custom report, send SIS Team your updated reimbursement rates if applicable. Once the rates have been updated, run the report to make sure they look correct
Completion: ASAP

☐ Look at your **(03) Application Guide** before processing any applications
Completion: prior to processing any applications

☐ Look at your **(07) Verification Guide** before beginning the Verification process
Completion: prior to starting the verification process

☐ If applicable, **(53) Update Item Master** prices
Completion: prior to the 1st day of school

☐ Have your MSDS submitter **(09) Upload an Early Roster** file. This is needed in order for new students to be included in your Direct Cert files. Once this has completed, and the DC file has been refreshed, you'll want to follow this: **(03h) How to load Direct Cert files into Skyward**:
Completion: ASAP. The earlier you get the DC students loaded, the fewer applications you'll have to process

☐ If applicable, **(60a) Generate Customer Key Pad Numbers** or manually assign **(60b) Short IDs**
If applicable, run the **(60c) Key Pad Numbers Report** to obtain a list of short IDs
Completion: prior to the 1st day of school

☐ Run the **(46) Price Category Audit** utility to update any students that have the wrong Price Category associated to them. This should be run at least weekly through the month of September, then at the end of each month thereafter
Completion: a day or so before school starts, and at least once a week through the end of September

☐ If applicable, print new **(51a) Student Barcode Labels**. Do this at least a few days before school starts. If there have been changes made with teachers/schedules that affect how homerooms are assigned, you might find a number of students without, or with the wrong, teacher. If issues are found, refer your office staff/appropriate person to **(59b) Homeroom Information Office Staff Needs to Know**
Completion: ASAP

- ☐ If you have new cashiers, make sure they have the appropriate permissions set up and that they set their **(54) POS Configuration Options**

- ☐ If you got a new computer over the summer, run the **(34a) RESA FS Monthly Summary** to make sure that the **(34c) Crystal Viewer** got reinstalled. If not, ask your IT person to reinstall it for you

- ☐ Run **(17) Update Student Default Cafeterias** weekly, through the end of September, to update cafeterias for any students that have switched buildings – including late retainees, who may have gone from the middle school back to the elementary
  Completion: a day or so before school starts, then weekly through the end of September

(63) Frequently Asked Food Service Questions

Q: I can't see all of the reports/utilities/options mentioned in the Food Service documentation. Why?
A: You likely don't have permissions to whatever it is you're looking for. Contact the person in your district responsible for assigning permissions and let them know what you need

Q: I don't understand this numbering schema. What do the a, b, c's mean?
A: Any document number followed by an a, b, c… means there's a companion piece to the document. For example: 34a is the Monthly Food Service Summary. 34c, which shows how to install Crystal Viewer, is needed in order to filter the 34a report. 34b is the Daily equivalent of the Monthly report

Q: Wow. There's an awful lot of information in this documentation. Should I print it out?
A: No. All individual documentation is linked to the Summary pages. Therefore, if you find what you want in the Summary, you can click on it and it will jump you right down to the appropriate spot. Also, if you have an electronic copy of it, you can do key word searches to look for something specific you might be having trouble finding

Q: When I click on one of the links in the documentation, it doesn't take me to the specified area. I just get a message to CTRL + Click to get to the hyperlink. Why?
A: You have to turn on the option to click on hyperlinks:
1. In Word, in the upper left-hand corner of the screen, click on **File**
2. From the File Menu, click on **Options**
3. On the left-hand side of the screen, click on the **Advanced** tab
4. **Uncheck** the box to **Use CTRL + Click to follow hyperlink**:

☐ Use CTRL + Click to follow hyperlink
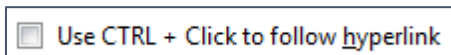
5. Click on **OK**

Q: I do something referenced in this document, but do it in a different way than what is shown. Do I have to do it how it's mentioned here?
A: No. If what you're doing works for you, and you don't want to change it, don't. However, over the years we have come up with different/easier ways to do some things that you may have received different instruction on in the past. This just provides some alternate options

Q: I'm trying to add/update something in the Item Master but am getting an error that batch updates exist. What do I need to do?
A: Before you can make any changes in the Item Master, you must first clear out any **(50a) FS Alerts**

Q: How can I get a list of Free/Reduced counts?
A: You can get Free/Reduced/Paid/Total counts, broken down by building, by running the **(33) Lunch Code Totals by Day** report**.** With this report, you can select a specific date to get your counts for. You can also get just summary counts, or include student names

Q: In Print Application Letters, I see these new templates set up that all start with 'Open Ranges'. What are these?

A: templates Barb set up to make it easier for when you need to reprint a Free/Reduced letter for an individual student. Refer to **(03j) Printing Application Letters/Copies for an individual student** for details

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Q: What report should I use to get my monthly high Free/Reduced counts for my reimbursement claim?
A: **(33) Lunch Code Totals by Day**: you don't need to report the highest day for the month for the Free and Reduced eligibility – you can use this report and run it for the last day of the month. The only purpose of providing this information is to show that you're not serving more meals than you should be, based on your student population and the attendance factor

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Q: What do the different lunch codes mean?
A: **Lunch Codes:**
D = Direct Cert (Free)
F = Income Eligible Free
G = Food Stamps (Free)
H = Homeless (Free)
O = Foster (Free)
R = Reduced
P = Paid
S = Staff
V = Visitor

Q: A parent is asking for details of his/her student's account. How can I get this information?
A: If it's turned on in Family Access, the parent can log in and see all purchases and/or payments made on the student's account. You can also run the **(25a) Payor Customer Meal Statements** report, which will provide a history of the student's transactions

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Q: Cashiers don't have access to Food Service Customers/Payors, so how can they get details of a student's account when a parent is asking?
A: By running the **(25b) Payor Customer Meal Statement**

Q: I have some Payments I need to record or fix. How do I go about doing this?
A: Refer to the **(10) Payments and Account Balances** document. This has different scenarios, as well as details on how to fix them

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Q: How long do I need to keep Free/Reduced rosters?
A: Every month you should print/save and retain, for 3 years, a roster of students eligible for Free/Reduced/Paid school meals. You can get this information by running the **(33) Lunch Code Totals by Day Report**

Q: If a student is on an application and then becomes Direct Cert, what should I do with the application?
A: Once the Direct Certification file is loaded, it's good practice to pull any paper applications that you may have processed for anyone on the DC list. You'll be able to tell if this is the case from the report that is generated during the DC load. The top section of the report will tell you what the student's current Lunch Code is, as well as the Effective Date of the Lunch Code. If the 30 day carryover has already been run, any student that appears with an F, G, H, O or R lunch code has a current year application that

should be pulled. Before the 30 day carryover is run, any student that shows a current lunch code of F, G, H, O or R AND has a current year effective date should have their application pulled

Q: Can I email the notices of eligibility when I process applications?
A: Email may be used to notify households of their eligibility status. Skyward, starting with the 16-17 school year, now offers this option. Refer to **(03k) Emailing Application Letters** for instruction

Q: What's the earliest I can process an application for a new school year?
A: Applications for a given school year cannot be signed or processed prior to July 1st of that school year

Q: What's the rule about household eligibility and extending benefits?
A: If anyone in a household is eligible for Food Stamps, everyone in the household is eligible. This applies to DC as well. You may be a multi-millionaire and your unemployed brother comes to stay with you. If his children are DC, yours qualify as well. If mom and boyfriend live together, and boyfriend's kids are eligible, so are moms.

Q: Should I restart my application numbers every year – starting with 1?
A: You should not restart your application numbering system from one year to the next. The reason for this is that you might have a student on application #14, which is a Paid application. Now, the New Year starts and you start over numbering your apps starting with 1. You enter a new application, for a different student, with a number of 14. You now have two different students, on 2 different applications, with the same number. It's hard to differentiate/troubleshoot when this happens

Best practice: include the school year with the application number. This information is often helpful when troubleshooting issues. Example: last year's app was 15-16: 202. If the family reapplies, the next school year's app would be 16-17: 202

Q: I'm processing applications and printing the notices out. However, I notice that the parent/guardian that's printing on the letter is not necessarily the person that submitted the application. Why?
A: When you process an application, there's nowhere you tell the system who the applicant is. Skyward's Food Service is designed to print application letters based on who the first person is that's listed in a student's Family 1 record. So, for example, student lives with mom half the week and dad half the week. Mom is listed as Family 1, Guardian 1, and dad is listed in Family 2, Guardian 1. Dad fills out the application, which results in a Free status. When this application letter is printed out, it's going to have mom's name and address on it, as she's listed first in the student's family. Mom is then going to get the results of dad's application. As of this time, there is no solution for this. Just be aware of it…

Q: When should I edit an application versus creating a new one?
Answer: Edit: if a mistake was made when entering an application – whether it was on your part or the applicants, Edit the existing application and make the correction. When you do this, whatever change you make will be effective based on the application's effective date. Be aware that you should not make changes that will affect previous month claim numbers. For example, if the September claim was already submitted, and you realize a student should have been Free but was showing as Reduced, editing the application will change September claim numbers
Creating a new application: you're going to create a new application when circumstances have changed, which might result in a change in eligibility. Example: student was Reduced, but the family lost one

source of income. Circumstances have changed, so you want to create a new application, which will be effective as of the new application's effective date

Q: Should I be backdating the Direct Cert files?
A: Yes, just be aware of the following: let's say you create an application for a student with an effective date of 9/20, which results in a Reduced status. The new DC file comes out on 9/22 and has an Effective Date of 9/18. When you load this DC file, it will overwrite your Reduced application, but does not update the Customer Control Record. The end result is that the application will show Free and the Customer Control Record will show Reduced. The student will continue to be charged the Reduced amount. A ticket has been submitted to Skyward to address this

Q: How do I know if a student's application is the current one?
A: in Zangle, applications expired. If the student was Free or Reduced, and a new application wasn't turned in the next school year, his/her application expired. As a result, not all students had a current/active application. Furthermore, if the family never submitted an application, and the student wasn't on the DC list, they had no application at all. However, in Skyward, every customer – adult and student alike – has an application. These applications are always in effect until a new application is submitted or the 30 day carryover process is run. They never actually 'expire', they just aren't in effect anymore once a new application is created. There also can't be 'overlapping' statuses like there were in Zangle. Whatever the top listed application is in Skyward is the current one

Q: If I'm backdating an application, which dates should I backdate – the Effective or the Application date?
A: When processing an application, make the Application Date the same as the Effective Date. We've run into issues in the past when these weren't the same

Q: I sometimes get popup messages that I don't understand. How should I handle these?
A: It's very important that you read, and understand, any pop up messages you get in Food Service. Selecting a wrong option can have very unintended consequences. Refer to **(06a) Messages You Get during the Application Process** or **(55) Messages you get in the POS System.** If you still don't know what to do or don't have time to look it up, take a **(58) Screenshots from within Skyward** and address it when you have time

Q: Why do I see some applications with an application number that says Correction?
A: When **creating** an application to correct an issue, type **Correction** for the application number. This helps identify that there was an issue that was fixed by creating an application. For example: for whatever reason, a student account was created with a Staff lunch code. Create a Paid application for the student, enter the word Correction for the application number, and comment at the bottom what happened

Q: The income eligible application I'm processing has multiple pay frequencies. How should I process the income?
A: If a household has only one source of income, or if all sources are the same frequency (all weekly, all bi-weekly), do not use conversion factors. If a household has multiple pay frequencies, the correct method is to annualize all income

Q: There's a question about something that happened in the Lunch line. How can I see who rang what up?
A: By running the **(41a) Purchase Transactions Log Report** or the **(41b) Payment Transactions Log Report**

Q: I rang up a bunch of transactions today, but when I enter my cash drawer amount in the Sales Activity report, it tells me there is no activity to report. Why?
A: You're running the Sales Activity report with the wrong register selected. Go back into the POS and click on the Configure button to see what you were logged into

Q: What can be emailed to parents from Skyward's Food Service?
A: As of this time you can only email **(14) Payor Balance Notices** and **(03k) Emailing Application Letters**

Q: I'm printing negative balance notices and certain staff members aren't appearing on it. Why?
A: By default, staff accounts are set to not print notices. Run **(13) Change Payor Balance Indicator** to change all accounts to print notices

Q: A student has an application in Skyward that shows he should be getting Free meals. However, he's being charged for his meals. Why?
A: In Skyward, an application is only a means to calculate a Lunch Code. Once it's calculated, it creates a matching Lunch Code in the Customer Control Record. It's the CCR that determines what a student is charged for meals, not the application. While they're supposed to match, they don't always. Call SIS Team to troubleshoot until you're comfortable with what you're doing in the Control Records

Q: How can I put limits or messages on a student's account?
A: You can use a **(43a) Wanding Message** on the student's account, or **(43b) Stop ALL Purchases or ALL ala Carte Purchases**

Q: A student has a Direct Cert application, which is current for this school year. The student is now Homeless. Do I need to process a new application for him?
A: No. The only purpose of processing an application in Food Service is to make the student F/R eligible when they qualify. If they're already Free, regardless of the reason, you don't need to process another application

Q: I have way too much in my Food Service reports options. I'd like to get rid of anything I don't use. How can I get them removed?
A: Contact the person in your district responsible for assigning permissions and ask that the options you don't need to be taken out of the 000>FS Director permissions group

Q: Why shouldn't I clone DC applications from one student to another?
A: Because this can cause issues if the student you're cloning to already has an application with the same date or later. There are other issues as well, so it's not recommended

Q: Someone is using the wrong FS ID in the line and purchases are being recorded on an account that belongs to someone else. How can I figure out who's making these purchases?
A: **(43a) Wanding Messages**: you can add a message to the account being used, instructing the cashier to verify who the customer is

Q: I have a scenario not covered in any of this documentation and/or I don't know what to do about. What should I do?
A: let SIS Team know. If you have a scenario/question not covered, it's probably applicable to someone else as well

Q: I found something in this documentation that doesn't seem right, or is just plain wrong. What should I do?
A: definitely let SIS Team know. Many changes were made during the creation of this documentation and it would be surprising if something wasn't wrong somewhere.

Q: What do I do with a direct certification student that the parents don't want to receive the benefit?

A: Per Skyward: Add a new application for this student. You don't need to add the income information or household size. Just make the application full pay. I the note are record that the student is direct cert but the family has declined the benefit. For the Effective date of the application use the date the parent declined the benefit.

eFunds Payment Log Location

The following comes from Skyward, and provides information on minimum workstation requirements for running Skyward. These requirements are as of February, 2016:

Updated 10.23.2014 www.skyward.com

Recommended Browsers

Skyward recognizes the diverse Operating Systems, Devices, and Internet browsers our customers are using. While we want every customer to have the best possible experience, we recognize that it is impossible to develop applications that work identically, efficiently, and effectively with all browsers and versions. We also recognize that testing on every browser version and device combination is no longer possible as many new browser versions are deployed on aggressive weekly or bi-weekly schedules.

Skyward supports the following Web Browsers:

• **Chrome**

• **Firefox**

• **Microsoft Edge**

• **Internet Explorer**

   • **Note:** we have discovered that quite often options don't appear that should when using Internet Explorer. The RESA does not recommend using this as your browser choice

• **Safari**

General Workstation Requirements

   • 1024x768 resolution or higher is required for the core products and 800x600 resolution or higher is required for the Family/Student/Employee Access portals.
   • For Internet Explorer users Skyward recommends a 3rd party spell checker add on such as iespell or speckie. All other supported browsers include an inline spell checker.
   • Skyward Web Based Food Service Point Of Sale (POS) must meet the following minimum hardware requirements: Dual Core 1.6GHz or faster with RAM: 1 gigabyte (GB) (32-bit) or 2 GB (64-bit)
   • Skyward recommends using a PostScript printer with Adobe Acrobat Reader loaded on the client
   • Skyward does not support beta versions of Operating Systems or Web Browsers.
   • All system requirements are subject to change based on product version.

Minimum Web Browser Requirements for the Student Management Suite and School Business Suite Web Based Applications (Includes Family/Student/Employee Access portal requirements).

Operating System	Supported Browser List
Windows Workstation Browsers	
Windows Vista SP2	Chrome (current version[1]) Firefox (current version[1]) Internet Explorer 9
Windows 7 SP1	Chrome (current version[1]) Firefox (current version[1]) Internet Explorer 11
Windows 8.1	Chrome (current version[1]) Firefox (current version[1]) Internet Explorer 11
Windows 10	Chrome (current version[1]) Edge (current version[1]) Firefox (current version[1]) Internet Explorer 11
Windows Server Browsers	
Windows Server 2008 SP2	Chrome (current version[1]) Firefox (current version[1]) Internet Explorer 9
Windows Server 2008 R2 SP1	Chrome (current version[1]) Firefox (current version[1]) Internet Explorer 11
Windows Server 2012	Chrome (current version[1]) Firefox (current version[1]) Internet Explorer 10
Windows Server 2012 R2	Chrome (current version[1]) Firefox (current version[1]) Internet Explorer 11
Mac Browsers	
Mac OS X 10.6 through Mac OS X 10.11	Chrome (current version[1]) Firefox (current version[1]) Safari 5 through Safari 9
Chrome OS Browsers	
Chrome OS (current version[1])	Chrome (current version[1])
Microsoft Office	
Windows & Mac	Office 2003/ 2007/ 2010/ 2013 / 2016

Minimum Requirements for the **Skyward Mobile Access Application**. The Skyward Mobile Access App is available for installation on any Apple iOS, Microsoft Phone, or Google Android based device. To use the Skyward Mobile App simply Install the App and start using!

Feature	Benefits
Access through your mobile device	Free app is available to download through the iTunes App store, Microsoft Phone Store, Google Play, or Amazon Appstore. Works with your iPad, iPod Touch, or iPhone Works with your Android mobile devices Works with Microsoft Phones Saves your login and password for fast, easy access protected by a PIN number.
Mobile access to your Skyward Student Data	Have immediate access to a student's emergency medical information View a student's picture, schedule, attendance, or general information
Mobile access to your Business and HR Data	See all your accounts, requisitions, POs, insurance information, and paychecks
Mobile access for all users	Parents, students, teachers, counselors, principals, and business office staff - all users can be given access to Skyward Mobile Access.
Access to all of your Skyward modules	Have access to student, finance, human resources, My Print Queue, and Family Access software as well as your product setup so you can view reports that are in your queue

Minimum Requirements for the **Skyward SMS Mobile Web**. Skyward SMS Mobile allows users to access Skyward on almost any web enabled device using the devices web browser. To use the SMS Mobile Web just point your devices web browser at your Skyward URL and start using!

Skyward recognizes the diverse Mobile Operating Systems, Devices, and Internet browsers our customers are using. While we want every customer to have the best possible experience, we recognize that it is impossible to develop applications that work identically, efficiently, and effectively with all browsers and mobile OS versions. We also recognize that testing on every browser version and device combination is no longer possible as many new browser versions are deployed on aggressive weekly or bi-weekly schedules. While the Skyward mobile web application should work on most standard web enabled mobile device, Skyward specifically supports current versions of the following mobile operating systems using the device's default browser:

- **IOS**
- **Android**
- **Windows Mobile**

If an issue is discovered with one of the recommended mobile operating systems listed above, please report it to Skyward Support so that our development team can review the issue.

Feature	Benefits
Access through your mobile device	Compatible with most mobile devices including smartphones and tablets. Recommended operating systems iOS, Android, and Windows Mobile.
Mobile access to your Skyward Student Data	When seconds count, have immediate access to a student's emergency medical information View a student's picture, schedule, attendance, or general information
Mobile access to your Business and HR Data	See all your accounts, requisitions, POs, insurance information, and paychecks
Mobile access for all users	Parents, students, teachers, counselors, principals, business office staff - all users can be given access to SMS Mobile
Access to all of your Skyward modules	Have access to student, finance, human resources, My Print Queue, and Family Access software as well as your product setup so you can view reports that are in your queue

(65) Income Eligibility Guidelines

This document is typically for the person providing audit information for the AR audit and shows how to get the current Income Eligibility Guidelines from Skyward

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1. From the **000** entity, click on the **Food Service** tab
2. From the **Food Service** module, click on **Setup/Codes**
3. Click on **Income Eligibility Guidelines**
4. Click on the **Filter Options** button
5. Select the school year you need to get the income guidelines for and click on **Apply Filter**
6. Drag the window so you're able to see all Free and Reduced options
7. In the upper right-hand corner of your screen, click on the camera icon

8. Once the process has completed, click on View Report
9. You'll now see a screenshot of the Income Guidelines that you can print out

Note: keep in mind that you might not have permissions to see the Income Eligibility Guidelines. If not, contact the person in your district responsible for assigning permissions and tell them what you need

Note: if income eligible applications are submitted with different payment frequencies, Skyward converts all income to a yearly amount. If income eligible applications are submitted with all income sources having the same frequency, for example, weekly, Skyward does not convert the incomes to a yearly amount. It keeps them at the weekly (in this example) amount

(67a) Data Mining Food Service Report Options

This document is for anyone that needs specific Food Service information. It covers the reporting options found within Data Mining specific to Food Service. If a report doesn't currently exist in Food Service or Custom Reports that has the all the information in it you need, you may be able to get the information from a Data Mining Report

Within Data Mining, which is a module outside of Food Service, the following information can be reported on:
- Application Number:
- Bar Code Date:
- Bar Code Number:
- Cafeteria:
- Cafeteria Code:
- Control:
  - As of Date:
  - Effective Date:
  - Lunch Code:
  - Lunch Code Desc:
  - Payor Alphakey:
  - Payor Name:
  - Price Category Code:
  - Price Cateogry Desc:
- Current Lunch Code:
- Current Payor – Alphakey:
- Current Payor – LFM:
- Current Price Category:
- Daily Ala Carte Limit:
- Food Service Notes:
  - Note Category Code:
  - Note Category Description:
  - Note Comment:
  - Note Created By:
  - Note Date:
  - Note Description:
  - Note Entity:
  - Note Protect (Y/N):
  - Note Type:
- Key Pad Number:
- NSF Checks:
  - Amount:
  - Check Number:
  - Date:
  - Entity:
  - Entity Name:

- o Name on Check:
- o Notes:
- o Paid:
- o Paid Date:
- o School Year:
- NSF Non-Sufficient Funds:
- NSF Notes:
- NSF Stop Check Payments:
- Optional Benefits:
- Payor Address:
- Payor City, State Zip:
- Payor's Balance:
- Previous Lunch Code:
- Stop Ala Carte Purchases:
- Stop All Purchases:
- TANF/Food Stamp Nbr:
- Wanding Msg 1:
- Wanding Msg 1 Code:
- Wanding Msg 2:
- Wanding Msg 2 Code:
- Wanding Msg 3:
- Wanding Msg 3 Code:

(67b) Food Service Customer Views Options

This document is for anyone that needs specific Food Service information. It covers the different information that can be found within the different Food Service Customers views

When you go to the Customers section in Food Service, there are different views available. Each view has different information that you can see on the main screen in Customers. You can create custom filters in any of these section to see only the particular information you want

In Food Service Customers, there are 3 different 'Views' available

(Useful) information found in each of the Food Service Customer Views:
Customer Information view:
- **Last Name:**
- **First Name:**
- **Grade:**
- **Café:**
- **Lunch Code:**
- **Price Category:**
- **Key Pad Number:**

Why do I care about this? Perhaps you want to obtain a list of all students in KG that has their Key Pad Numbers on it and what building they're enrolled in. You could create a filter that says: show me only active students, in Kindergarten, and include the students Café and Key Pad Number. These results can then be exported to Excel

Move	Label	Display	Width	Low Value	High Value	
	Last Name	☑	100%		ZZZZZZZZZZZZZZZZZZZZZ	
✛	First	☑	100%		ZZZZZZZZZZZZZZZZZZZZZ	
✛	S	☑	100%	a	a	Reset
✛	Gr	☑	100%	KG	KG	Reset
✛	Cafe	☑	100%		ZZZZZ	
✛	Key Pad Number	☑	100%	-9,999,999,999.99	9,999,999,999.99	

Customer Purchases view:
- **Last Name:**
- **First Name:**
- **Grade:**
- **Café:**
- **Lunch Code:**
- **Price Category:**
- **Key Pad Number:**
- **Current Year Purchases:**

The only difference between this view and the previous is that this one includes a column indicating whether or not a customer has made a current year purchase

Why do I care about this? From this view you can set up a filter, as an example, that says "show me all active 9th – 12th graders who have made a cafeteria purchase this year. From this, you could easily see what percentage of your population eats in the cafeteria

Move	Label	Display	Width	Low Value	High Value	
	Last Name	☑	100%		ZZZZZZZZZZZZZZZZZZZZ	
✛	First	☑	100%		ZZZZZZZZZZZZZZZZZZZZ	
✛	S	☑	100%	a	a	Reset
✛	CY P	☑	100%	Checked/Yes ▼		Reset
✛	Gr	☑	100%	09	12	Reset

Primary Payor view:
- **Last Name:**
- **First Name:**
- **Grade:**
- **Café:**
- **Lunch Code:**
- **Price Category:**
- **Phone Number:**
- **Address:**
- **Prior Year Balance:**
- **YTD Payments:**
- **YTD Purchases:**
- **Last Payment:**
- **Last Payment Date:**
- **Current Updated Balance:**

With this view, you can see summary payment/purchase information for a specified customer

Why do I care about this?

You might want to see what a student's starting balance for the year was, which you can then compare to their current balance. Many districts want to know this information for the year-end, since negative balances cannot be forwarded to the next year

✛	Gr	✓	100%		ZZZZZZZZZZZZZZZZZZZZ
✛	LC	✓	100%		ZZZZZZZZZZZZZZZZZZZZ
✛	Prior Year Balance	✓	100%	-9,999,999,999.99	9,999,999,999.99
✛	Current Updated Balance	✓	100%	-9,999,999,999.99	9,999,999,999.99
✛	Middle	☐	100%		ZZZZZZZZZZZZZZZZZZZZ
✛	S	☐	100%	a	a

Results:

Customers ☆

Views: Primary Payor   Filters: test

	Last Name ▲	Gr	LC	Prior Year Balance	Current Updated Balance
1 ▶	Abbott	04	H	-4.00	42.50
2 ▶	Aboussouan 1	08	P	0.75	-2.25
3 ▶	Acre	03	P	-2.00	11.35
4 ▶	Adair	02	D	0.00	0.00

(67c) Food Service Payor Views Options

This document is for anyone that needs specific Food Service information. It covers the different information that can be found within the different Food Service Payors views

Just like there are different views available in Food Service Customers, there are different options available in Food Service Payors:

(Useful) information found in the Food Service Payors views:
Payor Information view: this is the same information that's found in the Food Service Customers **Primary Payor** view
- **Last Name:**
- **First Name:**
- **Prior Year Balance:**
- **YTD Payments:**
- **Current Updated Balance:**
- **YTD Purchases:**
- **Last Payment:**
- **Last Payment Date:**
- **Phone:**
- **Address:**
- **Lunch Code:**
- **Effective Date:** the date the current lunch code became effective

Applications view:
- **Last Name:**
- **First Name:**
- **Application Date**:
- **Effective Date:**
- **HH Size:**
- **Lunch Code:**

Customers view:
- **Last Name:**
- **First Name:**
- **Café**
- **Lunch Code:**
- **Price Category:**
- **Key Pad #:**
- **Grade:**

Payment History view: this view displays the last 3 payments recorded on a customer's account. It includes the following:
- **Last Name:**

- **First Name:**
- **Year**:
- **Payment Date**:
- **Payment (amount)**:
- **Check #**:
- **Café**:

Historical Customers view: there isn't anything noteworthy in this view