



Nassau BOCES– WebSMARTT User Group Meeting

11/06/2014



- Introduction (1-2 minutes)
- What's New in 3.13 (10 minutes)
- How To Update Your Letters (10 minutes)
 - Verification Letters
 - Negative/Low Balance Letters
 - DC Letter
 - Application Approval/Denial Letters
- 2.x->3.x Compliance (10 minutes)
 - Tracking Medicaid, SNAP, and TANF Students in 3.x
 - Possible Workarounds in 2.x
- End of Day (10 minutes)
 - Useful Reports
 - Tips for Reconciling Cash
- Questions/Discussion (3-5 minutes)

- Josh Weaver, Georgia
 - Account Specialist
 - Support multiple 50+ School Districts
 - Support 3rd Party Organizations
 - 7 Years experience supporting and implementing WinSNAP/WebSMARTT
 - School Food experience in Griffin-Spalding County School District in GA



Heartland School Solutions



Heartland School Solutions is a leading provider of innovative child nutrition management and secure online payment solutions to public and private schools in the United States, currently supporting more than 30,000 schools in all 50 states. The School Solutions team consists of more than 220 highly trained, dedicated team members with a passion for delivering the best solutions and service in the industry. Several of our employees have more than 20 years' experience in the child nutrition industry!

Heartland School Solutions is a division of Heartland Payment Systems, Inc., a FORTUNE 1000 company and the sixth largest payment processor in the United States, delivering credit, debit and prepaid card processing as well as payroll, check management, payment solutions, campus solutions and OneCard™ to more than 250,000 organizations nationwide

The Heartland School Solutions offices are located in Tempe, Arizona, Rochester, New York, Harlan, Kentucky, and Auburn, Alabama.



WebSMARTT 3.13 Enhancement Summary

- Added Support for Windows 8.1
- Added Support for SQL Server 2012 R2
- DC Enhancements
 - Added ability to extend SNAP, TANF, and Medicaid benefits to siblings
 - Added DC Sibling Indicator
 - Added Customer List – Extended DC by Sibling Report
 - Added Directly Certified Breakdown to Eligibility Detail Report
- DC Matching Wizard Enhancements
 - DC Matching Wizard Supports single SNAP/TANF file
 - DC Matching Wizard will no longer update customers that are attached to a Parent Refused Benefits type application.

Updating Letters in WebSMARTT

- WebSMARTT Features an editable linked word document in each letter
 - In 3.11 and higher, these letters are located in C:\WebSMARTT Docs\District\
 - In 3.10 SP1 and below, these letters are located in C:\Program Files\Common Files\WinSNAP\
 - File Names can be located by searching for Word Doc Links in Online Help

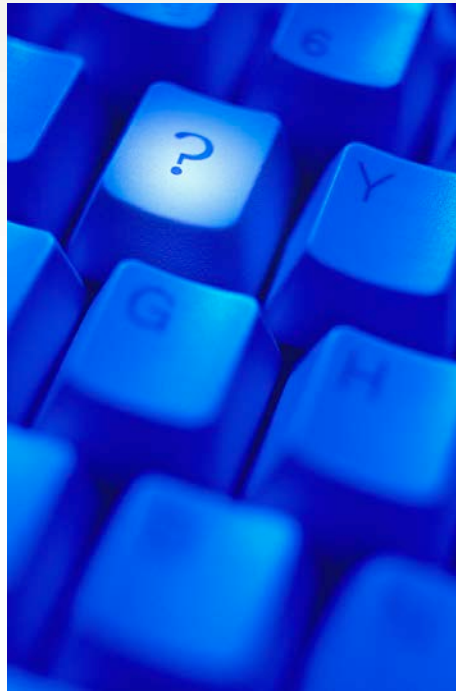
- In WebSMARTT 3.x:
 - SNAP/TANF/Medicaid Categories are all separate
 - Eligibility and Verification Reports are compliant with FNS742 regulations
- In WebSMARTT 2.x:
 - No functionality exists to separate these DC Types
 - Reports do not take into consideration DC Types
- In order to track in 2.x, the following manual method can be used:
 - Utilize the User Fields in the Customer | Information | Location section
 - Filter Reports to pull by User Field

Reports

- Sales and Meal Count
 - Breakdown of all money collected at POS and WebSMARTT
- Edit Check Report
 - Check for over-claiming, and for accuracy of meal counts
- Cashier Deposit Breakdown
 - Over/short for each cashier
- Cashier Summary Report
 - Cash expected for each cashier
- Item Sales
 - Compare to production records to verify quantities
- Highlights Report
 - CO can use to view over/short summary, and participation figures.

- **Summary Reports**
 - Use the End of Day Screen, Cash Journal, or Sales and Meal Counts reports to determine the area that is off.
- **Prepayment Reports**
 - Use the Prepayment Summary or Check Summary to find the individual transaction that is in error, or to verify if a transaction was entered.
- **Transactions – Find Issue**
 - Use the Transaction Log report to identify if a transaction was entered in error, or was not entered.
 - Use the Exceptions Report to look for Customer Ignored, or Clears that could explain the discrepancy.

Questions and Answers



Thank You.

Presenters:

Josh Weaver

Account Specialist

Heartland Payment Systems

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