Alabama State Department of Education

CNP Portal SFSP Module

Sponsor User Manual - Version 2

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1.0 SFSP Module Overview

1.1 Purpose

Welcome to the sponsor user manual for the Summer Food Service Program (SFSP) module of Alabama State Department of Education's (ALSDE) CNP Portal. The purpose of the SFSP module is to provide sponsors with the ability to complete and submit program application packets, submit and manage claims, and perform SFSP compliance review tasks. User permissions are assigned by ALSDE; therefore, sponsor users may not be able to access all functions outlined in this user manual.

1.2 User Manual

This user manual is intended for sponsor users and will provide:

- A general explanation of each available function in the SFSP module.
- Screen examples of website screens and forms.
- Step-by-step instructions for utilizing website features.
- Tips and notes to enhance understanding of the system.

1.3 Error Processing

All information entered and saved in the system is verified to ensure it conforms to data entry guidelines and system rules. The system performs two types of checks on information entered: input edits and business rule edits.

1.3.1 Input Edits

When information is saved, the system checks for input errors. These errors may include entry errors (e.g., entering a 4-digit zip code) or a nonlogical entry (e.g., entering a greater number of eligible than enrolled children). Input errors must be corrected before the data can be saved to the system.

1.3.2 Business Rule Edits

Business rule edits ensure that entered data conforms to federal regulation and state-defined requirements. Once data is saved, the system performs a business rule edit check. Business rule edits do not prohibit the system from saving the data entered on the screen.

2.0 Security

Each user is responsible for any actions taken under their user ID in the CNP Portal. The system is designed to allow sponsors and state to manage the distribution of federal funds for food programs. This means all usernames are responsible for following state and federal security guidelines.

2.1 Security Tips

Follow these recommended practices to improve security:

- Choose a difficult password. Avoid identifiable components such as family names, birth dates, or common words.
- Do not write down your password.
- Do not share your password with other users. If someone else certifies inaccurate data for fraudulent purposes under your username, then you will be held responsible.
- Do not step away from your computer while logged in to the system.
- Do not open multiple windows or tabs while logged in to the system.

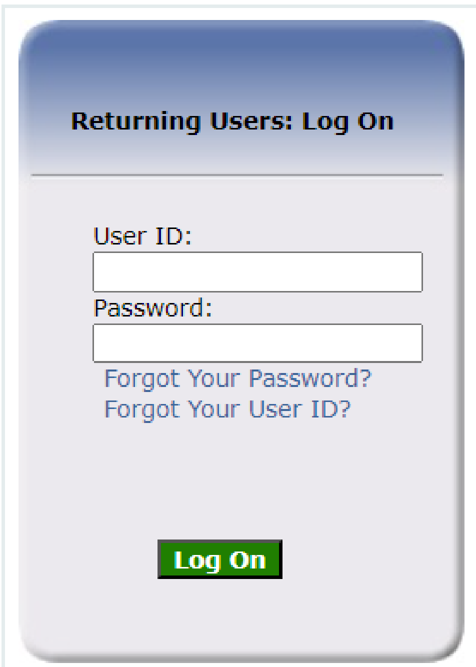
> **Note**: This is not an exhaustive list of security precautions. The state should inform all system users of any additional state-defined security practices.

3.0 Getting Started

Before accessing the SFSP module, a user ID and password must be assigned. These will be used to log in to the CNP Portal.

3.1 Log In

1) Access the system by typing the URL into the address line of your web browser.
2) Enter your assigned user ID.
3) Enter your password.
4) Select **Log On**.



3.1.1 First Time Logging In?

If this is your first time logging in to the system, you will be asked to change your password.

3.1.2 Forgot Your Password or User ID?

If you have forgotten your system password or user ID, select the **Forgot Your Password?** link or the **Forgot Your User ID?** link from the Log On page.

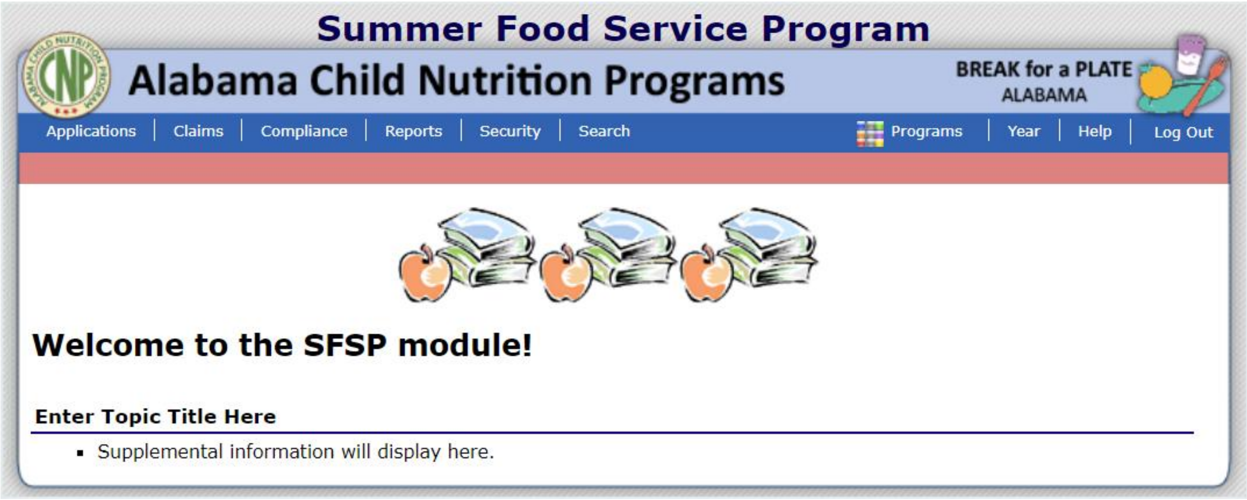
3.2 Programs Page

Once you have successfully logged in, the Programs page is displayed. An individual's access to specific modules is based on their assigned security rights. Select the **Summer Food Service Program** tile to access the SFSP module.

If a user only has access to the SFSP module, the Programs page will not display. Instead, the user will be taken directly to the SFSP splash page.

3.3 SFSP Splash Page

The SFSP splash page (i.e., home page) will display general information and announcements that all users will see upon logging in and selecting the SFSP module. From this page, use the main menu links (located in the header) to navigate through the SFSP module. Refer to section "10.1 Menu Links" on page 72 for navigation assistance.

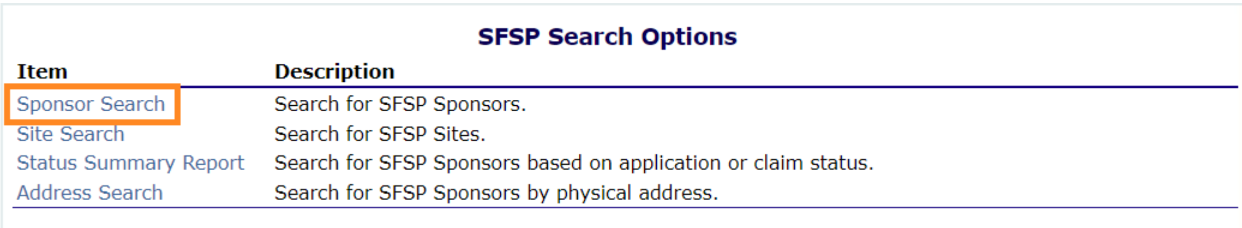


Note: The SFSP splash page is maintained by ALSDE.

3.4 Sponsor Search

For most SFSP functions, a sponsor must be selected prior to beginning a task in the system. Users associated with only one sponsor will not have access to this function; they will only see data for their sponsor.

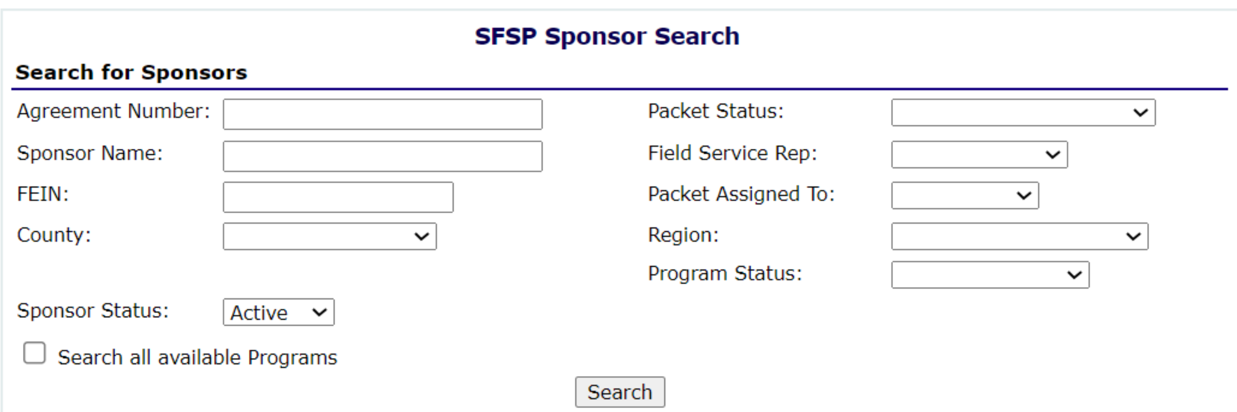
The Search function is used to search for and select a sponsor. To access the Search function, select the **Search** link from the main menu located in the header. You will be redirected to the SFSP Search Options screen. Select **Sponsor Search** from the list of menu items.



SFSP Search Options

Item	Description
Sponsor Search	Search for SFSP Sponsors.
Site Search	Search for SFSP Sites.
Status Summary Report	Search for SFSP Sponsors based on application or claim status.
Address Search	Search for SFSP Sponsors by physical address.

The SFSP Sponsor Search screen will display. Enter the desired search parameters and select the **Search** button. A list of sponsors matching the search criteria entered will display. Alternatively, you can leave all search fields blank and select **Search** to pull up a list of all available sponsors. Select a **Sponsor** from the results list and then navigate to the desired SFSP function.

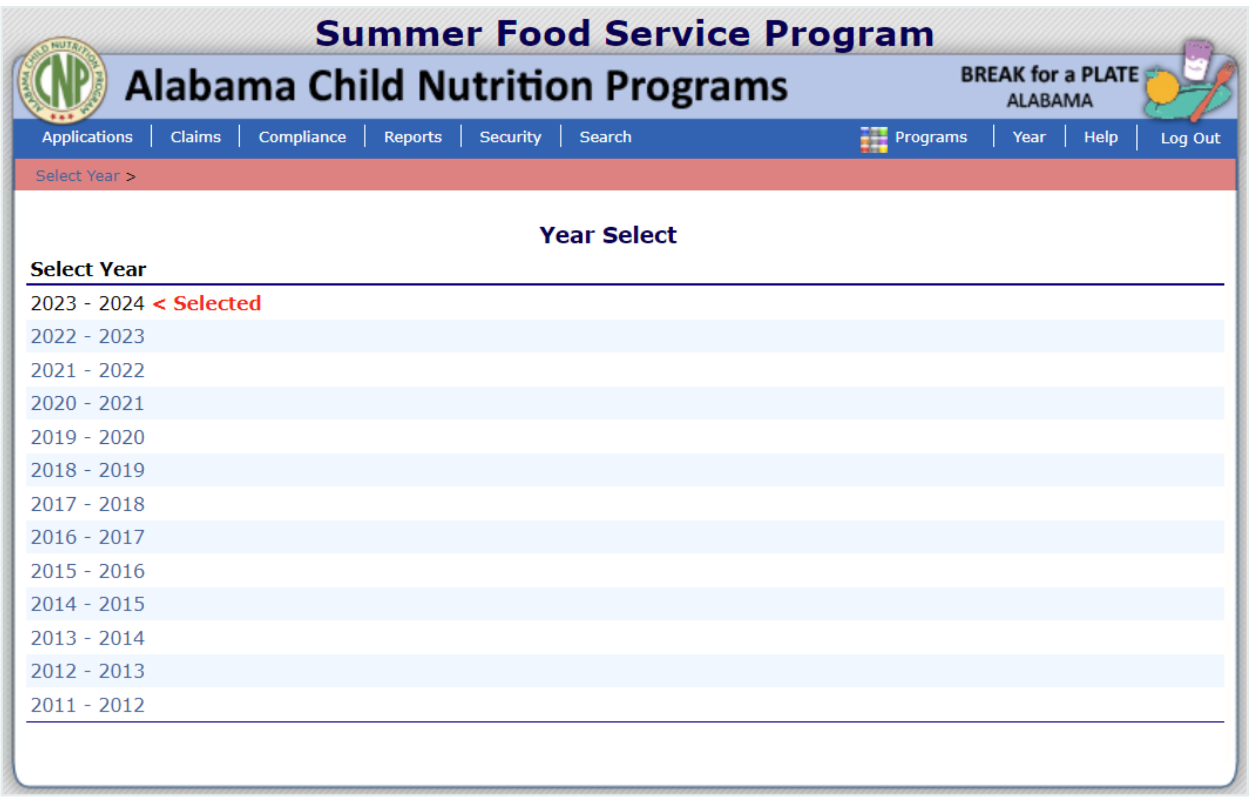


Note: If a user is associated with only one sponsor (as may be the case with most sponsor users), the SFSP Sponsor Search screen will not be accessible. The system will always default to the one associated sponsor's data. Additionally, results displayed after selecting the Search button will only include sponsors associated with the user's account.

3.5 Program Year Selection

The SFSP module defaults to the current program year. To switch between program years, select the **Year** link from the main menu in the header.

The Year Select screen will display. Select a **Program Year** from the list and then navigate to the desired SFSP function.



Note: ALSDE determines which users are granted permission to view and/or select program years outside of the current program year.

4.0 Applications

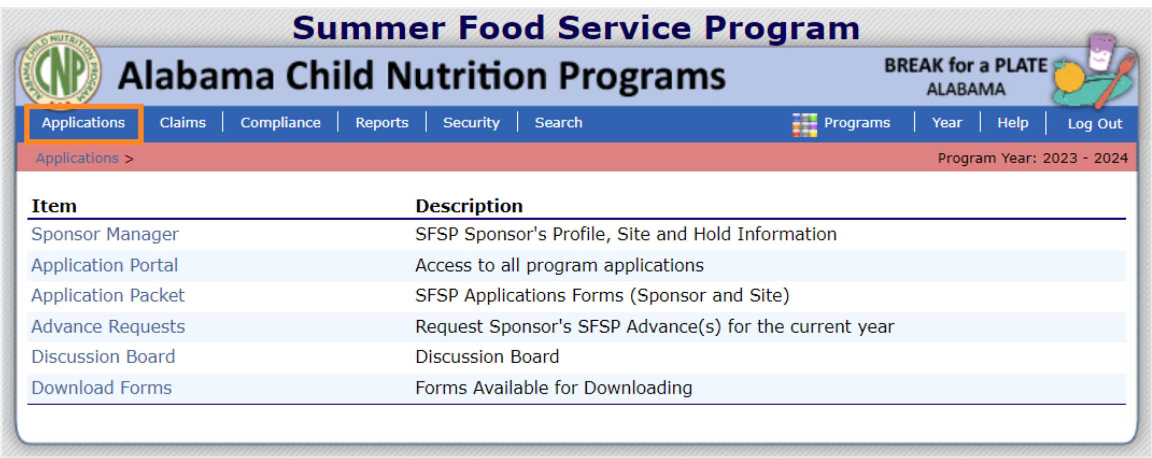
To participate in the Summer Food Service Program (SFSP), sponsors must submit an application packet to the state for review and approval at the start of each program year.

> **Note**: Detailed instructions for accessing, completing, and submitting an SFSP application packet can be found in section "5.0 SFSP Application Packet" on page 24.

4.1 Access the Applications Menu

The Applications menu is the starting point for all tasks related to the annual SFSP enrollment process. Menu items available are based on security permissions assigned by ALSDE.

1) Log in to the system.
2) Choose the **Summer Food Service Program** module.
3) The SFSP splash page will display. Select **Applications** from the main menu (located in the header).
4) The Applications menu will display. The menu items required by sponsor users to complete SFSP tasks will be discussed in the following sections.



> **Note**: Available menu items may vary among users based on security permissions assigned by ALSDE.

4.2 Sponsor Manager

The Sponsor Manager houses multiple functions, enabling sponsor users to manage their associated sites, technical assistance entries, and sponsor-level attachments.

4.3 Sponsor Profile

The Sponsor Profile provides general information about the sponsor. The data is not year specific; it provides general attribute information for the sponsor across all programs that will be used throughout the system such as sponsor name, type of agency, FEIN, county, program participation, etc. The Sponsor Profile is managed by ALSDE; it is view only for sponsor users.

4.3.1 View the Sponsor Profile

1) Access the Applications menu (page 14).
2) Select **Sponsor Manager**.
3) The Sponsor Manager menu will display. Select **Sponsor Profile**.
4) The Sponsor Profile will display in view-only mode. Review the information.
5) Select **< Back** when ready to return to the Sponsor Manager menu.

4.4 Site Manager

The Site Manager function enables sponsor users to view the Site Profiles of their associated sites. A Site Profile defines basic information such as site ID, site name, program participation, and status.

4.4.1 View a Site Profile

1) Access the Applications menu (page 14).
2) Select **Sponsor Manager**.
3) The Sponsor Manager menu will display. Select **Site Manager**.
4) The Sponsor Site Manager screen will display, listing all associated sites. Select any hyperlinked text in the row of the desired site.
5) The Site Profile will display in view-only mode. Review the information.
6) Select **< Back** when ready to return to the Sponsor Manager menu.

4.5 Sponsor Manager Technical Assistance

The Technical Assistance function of the Sponsor Manager enables sponsor users to view technical assistance provided outside of a compliance review. Technical assistance associated with a compliance review can be found on the Review Dashboard. Refer to section "7.7 Technical Assistance" on page 66 for more information.

4.5.1 View Technical Assistance

1) Access the Applications menu (page 14).
2) Select **Sponsor Manager**.
3) The Sponsor Manager menu will display. Select **Technical Assistance**.
4) The Technical Assistance screen will display. Select a **Date Provided** to view the associated technical assistance.

Technical Assistance Provided | **Days:** 30 60 90 All | **Count: 1**

Date Provided	Representative	Recipient	Programs	Description	Associated TA
02/23/2024	Test	User, Test	SFSP	Test	

5) The Technical Assistance Detail screen will display. Review the information. When finished, select **< Back** to return to the Technical Assistance screen.

4.6 Sponsor Manager Attachments

The Sponsor Manager Attachments function enables sponsor and state users to upload documents and files into the system for centralized storage. Permission to view, add, modify, or delete attachments may vary among users; security permissions are assigned by ALSDE.

4.6.1 Upload a Sponsor Manager Attachment

1) Access the Applications menu (page 14).
2) Select **Sponsor Manager**.
3) The Sponsor Manager menu will display. Select **Attachments**.
4) The Agreement Form Upload List screen will display. Select **Add Attachment**.
5) The Agreement Form Upload Detail screen will display. Select **Choose File**.
6) An Open File dialog window will display. Select and open the desired file from your computer.
7) Enter a description of the file in the Comment textbox, if needed.
8) When finished, select **Save**.

4.6.2 View or Modify a Sponsor Manager Attachment

1) Access the Applications menu (page 14).
2) Select **Sponsor Manager**.
3) The Sponsor Manager menu will display. Select **Attachments**.
4) The Agreement Form Upload List screen will display.
    a. Select **View** next to a file to access the file information in view-only mode. This screen will display the file name, size, content type, upload date, etc. When finished, select **< Back** to return to the Agreement Form Upload List screen.
    b. Select **Modify** to make changes to file information. Only the information in the **Comment** textbox can be modified. When finished, select **Save**.
    c. Select the **File Name** to download the file to your computer.

4.6.3 Delete a Sponsor Manager Attachment

1) Access the Applications menu (page 14).
2) Select **Sponsor Manager**.
3) The Sponsor Manager menu will display. Select **Attachments**.
4) The Agreement Form Upload List screen will display. Select **Modify** next to the attachment.
5) The Agreement Form Upload Detail screen will display. Select **Delete** from the Screen Options menu in the upper right-hand corner.
6) A warning message will display at the bottom of the screen. Select the **Delete** button to confirm the action.

4.7 Application Portal

The Application Portal is a “combined program” screen that provides access to information for all program applications to which the user is granted access.

4.7.1 View Notes for Sponsor in the Application Portal

The Application Packet Notes for Sponsor section of the Application Portal lists all notes that were documented by the state and made visible to the sponsor for the selected program year. These notes can also be accessed from the associated application packet (refer to section “5.9 Application Packet Notes for Sponsor” on page 41 for more information).

1) Access the Applications menu (page 14).
2) Select **Application Portal**.
3) The Application Portal will display. Select the **Expand** arrows to the right of the Application Packet Notes for Sponsor header.
4) The Application Packet Notes for Sponsor section will expand, displaying all notes included on the sponsor’s application packets. Locate the note you wish to view and select the **Date**.

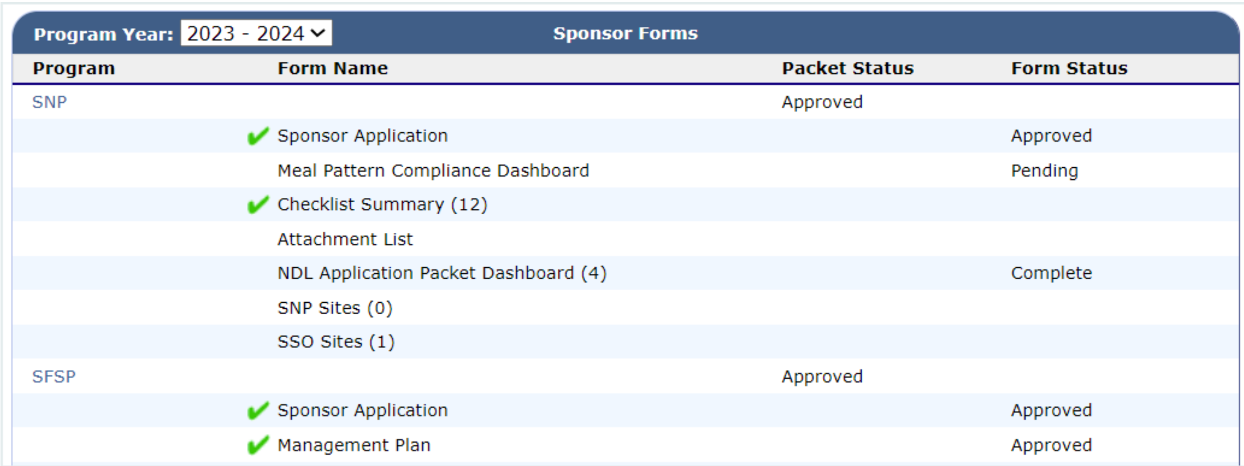
Application Packet Notes for Sponsor

Program	Date	Created By	Subject
SFSP	2/23/2024	Developer CCG	Test Note

5) The Application Packet Note screen will display. Review the information. Select the **< Back** button when ready to return to the Application Portal.

4.7.2 View Sponsor Form Statuses in the Application Portal

The Sponsor Forms section of the Application Portal displays all packet items and their current status for each enrolled program in the chosen program year.



Program Year: 2023 - 2024 — Sponsor Forms

Program	Form Name	Packet Status	Form Status
SNP		Approved	
	Sponsor Application		Approved
	Meal Pattern Compliance Dashboard		Pending
	Checklist Summary (12)		
	Attachment List		
	NDL Application Packet Dashboard (4)		Complete
	SNP Sites (0)		
	SSO Sites (1)		
SFSP		Approved	
	Sponsor Application		Approved
	Management Plan		Approved

Column headers of the Sponsor Forms section are defined in the table below.

Table 1: Application Portal - Sponsor Forms Column Definitions

Field	Definition
Program	Enrolled program within the chosen program year. Click on a hyperlinked program name to access the associated application packet.
Form Name	Lists the application packet components of each enrolled program.
Packet Status	Indicates that status of the program's application packet in the chosen program year.
Form Status	Indicates that status of the packet item.

Note: Use the Program Year drop-down menu to the left of the Sponsor Forms header to switch between program years. The Application Portal screen will refresh to display data for the selected program year.

4.7.3 View Site Application Statuses in the Application Portal

The Site Applications section of the Application Portal displays all available Site Application types (based on the enrolled programs) and their current status in the chosen program year. Click on a hyperlinked program name to access the associated application packet.

Site Applications								
Program	Approved	Submitted for Approval	Not Submitted	Return for Correction	Denied	Withdrawn/ Closed	Error	Total Applications
SNP	0	0	0	0	0	0	0	0
SSO	0	0	1	0	0	0	0	1
SFSP	0	0	3	0	0	0	0	3
CACFP - Centers	0	0	0	0	0	0	1	1
CACFP - DCH	0	0	0	0	0	0	0	1

Note: Refer to Appendix C on page 81 to view all possible form statuses.

4.8 Advance Requests

Sponsors will use the Advance Requests function to submit a request for payment advances and to view the status of their submitted requests.

4.8.1 Create an Advance Request

1) Access the Applications menu (page 14).
2) Select **Advance Requests**.
3) The Summer Food Service Program Advance Requests screen for the chosen program year will display. Select **Add** next to the desired advance month.

Action	Advance Month	Advance Amount	Outstanding Amount	Status	Date Processed
Add	Oct 2023			n/a	
Add	Nov 2023			n/a	

4) The Advance Request Detail screen will display.
   a. Select the **Advance Request** checkbox.
   b. Select the **Certification** checkbox.
5) When finished, select **Save**.

4.8.2 View or Modify an Advance Request

An advance request can be modified by the sponsor until it is approved. Once the request is in "Approved" status, any changes made to the request will result in a "Pending Approval" status and must be reviewed by ALSDE.

1) Access the Applications menu (page 14).
2) Select **Advance Requests**.
3) The Summer Food Service Program Advance Requests screen for the chosen program year will display. Select **View** or **Modify** next to the desired request.

Action	Advance Month	Advance Amount	Outstanding Amount	Status	Date Processed
View Modify	Oct 2023			Pending Approval	

4) The Advance Request Detail screen will display.
    a. If viewing the information, select **< Back** when ready to return to the Summer Food Service Program Advance Requests screen.
    b. If modifying the information, make the necessary changes and select **Save**.

4.8.3 Delete an Advance Request

Advance requests that have not been reviewed by the state (i.e., are in "Pending Approval" status) can be deleted.

1) Access the Applications menu (page 14).
2) Select **Advance Requests**.
3) The Summer Food Service Program Advance Requests screen for the chosen program year will display. Select **Modify** next to the request to be deleted.

Action	Advance Month	Advance Amount	Outstanding Amount	Status	Date Processed
View Modify	Oct 2023			Pending Approval	

4) The Advance Request Detail screen will display. Select **Delete** from the Screen Options menu in the upper right-hand corner.
5) A warning message will display at the bottom of the screen. Select the **Delete** button to confirm the action.

4.9 Discussion Board

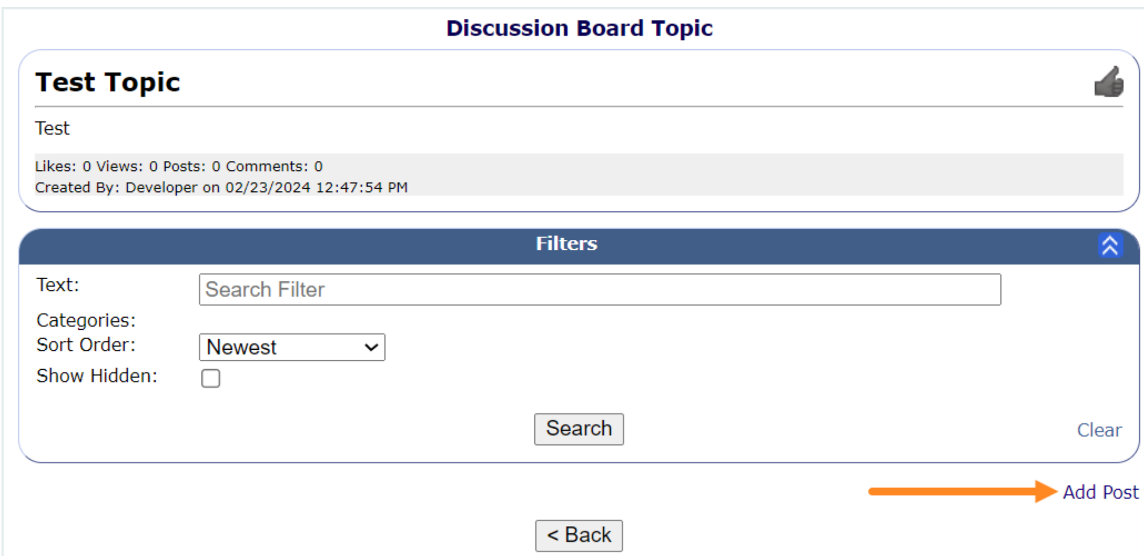
The Discussion Board function enables sponsor users to view and participate in conversations surrounding a variety of posted topics.

> **Note**: Use the Thumbs Up icon to “like” and show support for posts and comments.

4.9.1 Add a Post

Choose a discussion topic of interest and add a post. Other users can then comment on the post to discuss the subject amongst one another.

1) Access the Applications menu (page 14).
2) Select **Discussion Board**.
3) The Discussion Board Topic List screen will display. Select a **Topic**.
4) The associated Discussion Board Topic screen will display. Select the **Add Post** link in the bottom-right corner.

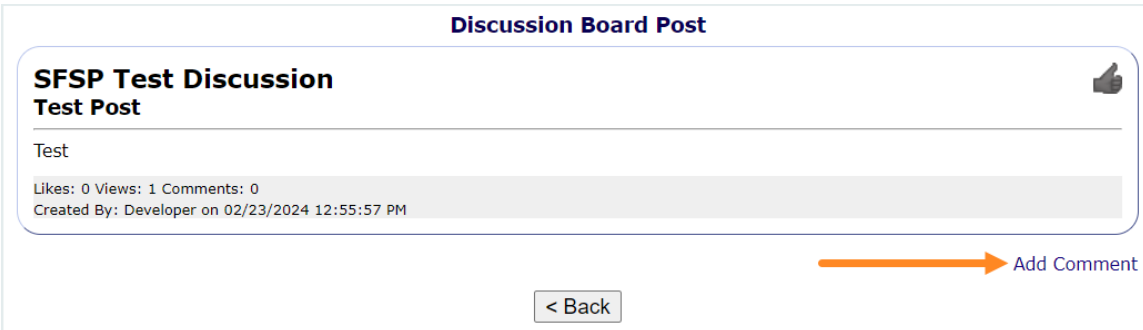


5) A Post pop-up will display. Provide the requested information. Required fields are indicated with an asterisk (*).
6) When finished, select **Save**.

4.9.2 Add a Comment

Users can add comments to posts.

1) Access the Applications menu (page 14).
2) Select **Discussion Board**.
3) The Discussion Board Topic List will display. Select a **Topic**.
4) The Discussion Board Topic screen will display. Select a **Post**.
5) The Discussion Board Post screen will display. Select **Add Comment**.



6) A Comment pop-up will display. Provide the requested information. Required fields are indicated with an asterisk (*).
7) When finished, select **Save**.

4.10 Download Forms

The Download Forms function enables users to view, download, and/or print form templates made available in the system by the state. Forms will either download automatically to your computer or will open in a new browser window, allowing you to view and save or print the form.

4.10.1 View or Download a Form

1) Access the Applications menu (page 14).
2) Select **Download Forms**.
3) The Download Forms screen will display. Select the **Form ID** of the form you wish to view or download.
4) The form will either download automatically to your computer or will open in a new window, allowing you to view, save, and/or print the form.

> **Note**: The New Sponsor column indicates whether the form is required for submission by sponsors new to the SFSP (Y = Yes, N = No).

5.0 SFSP Application Packet

To participate in the Summer Food Service Program (SFSP) sponsors must submit an application packet to the state for review and approval at the start of each program year.

5.1 Initiate the SFSP Application Process

The SFSP application packet contains the following items (required packet items are indicated with an asterisk):

- Sponsor Application*
- Management Plan*
- Food Production Facility List
- Site Application(s)*
- Budget Detail*
- Checklist Summary*
- Site Field Trip List
- Application Packet Notes for Sponsor
- Attachment List

Sponsors will be unable to submit claims until their application packet is in “Approved” status for the respective program year. If an application packet has been approved but a required packet item (Sponsor Application, Site Application, Budget Detail, Management Plan, or Checklist) has been revised, the entire application packet must be resubmitted by the sponsor for approval.

Sponsors that wish to receive advance payments must also submit an advance request to the state. An advance request must be submitted and approved for each program year. This is completed outside of the application packet. Refer to section “4.8 Advance Requests” on page 20 for more information.

5.1.1 SFSP Application Packet Order of Completion

The recommended order for completing required packet items is as follows:

1) Sponsor Application
2) Management Plan
3) Food Production Facilities List
4) Site Application(s)
5) Budget Detail
6) Checklist Summary

This order is important, as certain data is necessary for use in each subsequent form.

5.1.2 Enroll in the SFSP

Sponsors must enroll in the SFSP for the upcoming program year to access and complete the associated application packet.

> **Note**: Select information will automatically populate for sponsors with an approved application packet in a previous program year. Sponsors should still access and review all forms before submitting the packet to ensure rolled over data is accurate and that all questions have been answered (not all fields will roll over from the previous program year).

1) Access the Applications menu (page 14).
2) Select **Application Packet**.
3) The application packet will display.
    a. Returning sponsors will see the message “The sponsor has not started in the current year. Click ‘Enroll’ to enroll for this year based on your prior year’s information.” Sponsors should select the red **Enroll** button to proceed to the application packet.
    b. New sponsors must select **Add** and complete a Sponsor Application to initiate the application process.

5.1.3 Access the Application Packet

1) Log in to the system.
2) Choose the **Summer Food Service Program** module.
3) The SFSP splash page will display. Select **Applications** from the main menu (located in the header).
4) The Applications menu will display. Select **Application Packet**.

5.2 Sponsor Application

The Sponsor Application is a required component of the application packet and should be completed first. Responses in the Sponsor Application will affect which additional required forms populate into the Checklist section of the application packet. Some application data will roll over if the sponsor had an approved application saved in the system for a previous program year.

5.2.1 Complete the Sponsor Application

The Sponsor Application is the first form that will be completed in the application packet.

1) Access the application packet (page 26).
2) The application packet will display. The first form you will complete is the Sponsor Application.
   a. New Sponsors: Select **Add** to access the Sponsor Application.
   b. Returning Sponsors: Select the red **Enroll** button to access the full application packet. Select **Modify** next to the Sponsor Application packet item to review prepopulated data.
3) The Sponsor Application will display. Provide the requested information.
4) When finished, select **Save** at the bottom of the form.
5) A confirmation message will display, informing the user of the form's status. If any errors and/or warnings are noted, select **< Edit** to return to the form and make the necessary corrections.
6) Once the form is saved successfully, the confirmation message "The Application has been saved." will display. Select **< Edit** to return to the form or **Finish** to return to the application packet.

5.2.2 Modify the Sponsor Application

Modifications can be made to the Sponsor Application until it is submitted as part of the application packet to the state for approval. Once the Sponsor Application is in "Approved" status, a revision must be created if changes are desired.

1) Access the application packet (page 26).
2) Select **Modify** next to the Sponsor Application packet item.
3) The Sponsor Application will display. Make the necessary changes.
4) When finished, select **Save**.

5.2.3 Delete the Sponsor Application

A Sponsor Application can only be deleted if the sponsor has not yet submitted any claims for the associated program year. Once the application has been deleted, it is permanently removed from the system and cannot be restored. Use caution before deleting an application.

1) Access the application packet (page 26).
2) Select **Modify** next to the Sponsor Application packet item.
3) The Sponsor Application will display. Select **Delete** from the Screen Options menu in the upper right-hand corner.
4) A warning message will display at the bottom of the form. Select the **Delete** button to confirm the action.

5.2.4 Revise the Sponsor Application

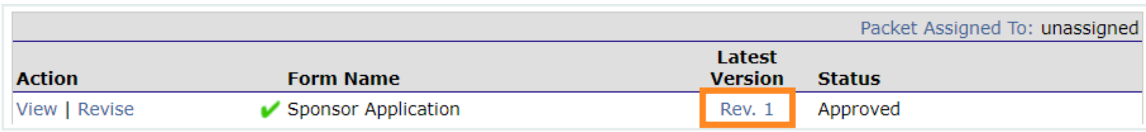
If changes to the Sponsor Application are needed after the form has been approved, a revision must be created.

1) Access the application packet (page 26).
2) Select **Revise** next to the Sponsor Application packet item.
3) The message "Are you sure you want to revise your application?" will display. Select **Continue**.
4) The Sponsor Application will display, populated with data from the most recently approved version. Make the necessary changes.
5) When finished, select **Save**.
6) Revision of the Sponsor Application requires resubmission of the entire application packet. Return to the application packet screen and select **Submit for Approval**.

5.2.5 View Sponsor Application History

If there are multiple versions of the Sponsor Application (i.e., revisions exist), the system defaults to the latest version. All versions are accessible and can be viewed.

1) Access the application packet (page 26).
2) Select the **Version Link** in the Latest Version column of the Sponsor Application packet item.



3) The Sponsor Application History screen will display. Select the **Effective Claim Period** date of the version you would like to view.
4) The associated Sponsor Application will display. Review the information.
    a. A Show Changes feature is available to highlight changes made in revised versions of the Sponsor Application. In the upper right-hand corner of the form, select **Show Changes** to turn the feature on or **Hide Changes** to turn the feature off.

5) Select **< Back** at the bottom of the screen when ready to return to the Sponsor Application History screen.

5.3 Management Plan

The Management Plan must be completed by all sponsors wishing to participate in the SFSP. The system will not allow an application packet to be submitted to the state without an error-free Management Plan.

5.3.1 Complete the Management Plan

1) Access the application packet (page 26).
2) Select **Details** next to the Management Plan packet item.
3) The SFSP Management Plan screen will display.
    a. New sponsors: Select **Add Management Plan**.
    b. Returning sponsors: Select the most recent **Version** of the Management Plan in "Pending Validation" status.
4) The Management Plan will display. Provide the requested information.
5) When finished, select **Save** at the bottom of the form. It may take a few moments for the form to save; do not navigate away from the page.
6) A confirmation message will display, informing the user of the form's status. If any errors and/or warnings are noted, select **< Edit** to return to the form and make the necessary corrections.
7) Once the form is free of errors, the confirmation message will show that "The Management Plan has been saved." Select **Finish**.

5.3.2 Modify the Management Plan

Modifications can be made to the Management Plan until it is submitted for approval as part of the application packet. Once the plan is in "Approved" status, a revision must be created if changes are desired.

1) Access the application packet (page 26).
2) Select **Details** next to the Management Plan packet item.
3) The SFSP Management Plan screen will display, listing all versions of the form saved in the system. Select the **Version** you wish to modify.
4) The Management Plan form will display. Make the necessary changes.
5) When finished, select **Save**.

5.3.3 Delete the Management Plan

The Management Plan cannot be deleted once the application packet is in "Approved" status. Once the Management Plan has been deleted, it is permanently removed from the system and cannot be restored.

1) Access the application packet (page 26).
2) Select **Details** next to the Management Plan packet item.
3) The SFSP Management Plan screen will display, listing all versions of the form saved in the system. Select the **Version** you wish to delete.
4) The associated Management Plan form will display. Select **Delete** from the Screen Options menu in the upper right-hand corner.
5) A warning message will display at the bottom of the form. Select the **Delete** button to confirm the action.

5.3.4 Revise the Management Plan

If changes to the Management Plan are needed after the form has been approved, a revision must be created.

1) Access the application packet (page 26).
2) Select **Details** next to the Management Plan packet item.
3) The SFSP Management Plan screen will display. Select the red **Revise Management Plan** button.
4) The Management Plan will display, populated with data from the most recently approved version. Make the necessary changes.
5) When finished, select **Save**.
6) Revision of the Management Plan requires resubmission of the entire application packet. Return to the application packet screen and select **Submit for Approval**.

5.3.5 View Management Plan History

If there are multiple versions of the Management Plan within the system (i.e., revisions exist), the system defaults to the latest version. All versions are accessible and can be viewed.

1) Access the application packet (page 26).
2) Select **Details** next to the Management Plan packet item.
3) The Management Plan screen will display. Select the desired **Version**.
4) The associated Management Plan will display. When finished reviewing the information, select **< Back**.

5.4 Food Production Facility List

The Food Production Facility List contains information about each food production facility that the sponsor will use to provide meals to its sites. While not a required component of the application packet, this item should be completed for sponsors with vended meals and/or central kitchen services.

5.4.1 Add a Food Production Facility

1) Access the application packet (page 26).
2) Select **Details** next to the Food Production Facility List packet item.
3) The Food Production Facilities screen will display.
    a. New sponsors or returning sponsors needing to add additional facilities: Select **Add Facility**.
    b. Returning sponsors with existing facilities: Select a **Facility Name** to access and review/complete the associated form.
4) A Food Production Facility form will display. Provide the requested information and select **Save**.

5.4.2 Modify a Food Production Facility

No changes can be made to the Food Production Facility form once it is in "Approved" status.

1) Access the application packet (page 26).
2) Select **Details** next to the Food Production Facility List packet item.
3) The Food Production Facilities screen will display. Select the **Facility Name**.
4) The associated Food Production Facility form will display. Make the necessary changes and select **Save**.

5.4.3 Delete a Food Production Facility

1) Access the application packet (page 26).
2) Select **Details** next to the Food Production Facility List packet item.
3) The Food Production Facilities screen will display. Select the **Facility Name**.
4) The associated Food Production Facility form will display. Select **Delete** from the Screen Options menu in the upper right-hand corner.
5) A warning message will display. Select the **Delete** button to confirm.

5.5 Site Applications

Sponsors must complete a Site Application for each of their participating sites at the start of a new program year. Some application data will roll over if the site participated in a previous program year and had an approved application saved in the system. Site Applications of sites not participating in the upcoming program year should be deleted.

5.5.1 Complete a Site Application

1) Access the application packet (page 26).
2) Select the **Summer Food Service Program** link in the Site Applications section near the bottom of the packet.
    a. Returning sponsors will see a value > 0 in the Pending column if approved Site Applications exist in a previous program year.
3) The SFSP Site List will display, showing enrolled sites.
    a. New sponsors or returning sponsors with additional sites to enroll should select the **Add Site Application** link and advance to step 4.
    b. Returning sponsors with rolled over Site Applications should select **Modify** to review and complete these applications (select data will roll over from the previous program year). Refer to section “5.5.2 Modify a Site Application” on page 33 for instructions on modifying an existing Site Application.
    c. Returning sponsors with rolled over Site Applications for sites that do not plan to participate in the SFSP for the upcoming program year should delete the associated Site Application. Refer to section “5.5.3 Delete a Site Application” on page 33 for instructions on deleting an existing Site Application.
4) The Available Site(s) screen will display.
    a. Select the desired **Site** from the list to enroll it in the current program year. A Site Application will display. Provide the requested information and **Save**.
    b. If the desired site does not display, select the **Add New Site** link. A ‘Quick’ Site Profile form will display, allowing you to create a profile for a new site. Provide the requested information and select **Save**. A Site Application for the newly added site will then display. Provide the requested information and **Save**.

5) Upon saving, a confirmation message will display, informing the user of the form's status. If any errors and/or warnings are noted, select **< Edit** to return to the form and make the necessary corrections.
6) Once the form is free of errors, a confirmation message will show that "The Site Application has been saved." Select **< Edit** to return to the form or **Finish** to return to the SFSP Site List.

> **Note**: Refer to Appendix A on page 76 for assistance utilizing the Calendar function of the Site Application.

5.5.2 Modify a Site Application

Modifications can be made to a Site Application until it is submitted as part of the application packet to the state for approval. Once a Site Application is in "Approved" status, a revision must be created if changes are desired.

1) Access the application packet (page 26).
2) Select the **Summer Food Service Program** link in the Site Applications section near the bottom of the packet.
3) The Site List will display. Select **Modify** next to the desired site to access the associated Site Application.
4) Make the necessary changes and select **Save** when finished.

5.5.3 Delete a Site Application

Site Applications cannot be deleted once in "Approved" status. Once a Site Application has been deleted, it is permanently removed from the system and cannot be restored.

1) Access the application packet (page 26).
2) Select the **Summer Food Service Program** link in the Site Applications section near the bottom of the packet.
3) The Site List will display. Select **Modify** next to the site to be deleted.
4) The associated Site Application will display. Select **Delete** from the Screen Options menu in the upper right-hand corner.
5) A warning message will display. Select the **Delete** button to confirm the action.

5.5.4 Revise a Site Application

If changes to a Site Application are needed after the form has been approved, a revision must be created.

1) Access the application packet (page 26).
2) Select the **Summer Food Service Program** link in the Site Applications section near the bottom of the packet.
3) The SFSP Site List will display. Select **Revise** next to the Site Application to be revised.
4) The Site Application will display, populated with data from the most recently approved version. Make the necessary changes and select **Save**.
5) Revision of a Site Application requires resubmission of the entire application packet. Return to the application packet screen and select **Submit for Approval**.

5.5.5 View Site Application History

If there are multiple versions of a Site Application within the system (i.e., revisions exist), the system defaults to the latest version. All versions are accessible and can be viewed.

1) Access the application packet (page 26).
2) Select the **Summer Food Service Program** link in the Site Applications section near the bottom of the packet.
3) The SFSP Site List will display. Select the **Version** link of the desired site in the Version/Status column.

Action		Site ID / Site Name	Version/ Status
View | Revise	✔	1234567800 Dino SFSP	Original Approved

4) The Site Application History screen will display. Select **View** next to the version you wish to view.
5) The associated Site Application will display. When finished reviewing the information, select **< Back**.
    a. A Show Changes feature is available to highlight changes made in revised versions of the Site Application. In the upper right corner of the form, select **Show Changes** to turn the feature on or **Hide Changes** to turn the feature off.

5.5.6 Close a Site

If granted permission by ALSDE, some sponsor users will have the ability to close a site in the system. Applications cannot be submitted for a closed site.

1) Access the application packet (page 26).
2) Select the **Summer Food Service Program** link in the Site Applications section near the bottom of the packet.
3) The Site List will display. Select the **Version** link in the Version/Status column of the desired site.

Action		Site ID / Site Name	Version/ Status
View | Revise	✔	1234567800 Dino SFSP	Original Approved

4) The Site Application History screen will display. Select **Close Site**.

Action	Effective Claim Period	Version	Status	Approved Date
View	Oct 2023	Original	Approved	01/29/2024

5) An End Site Agreement form will display. Provide the requested information.
   a. If the sponsor is entering site-level claims, the Days of Operation fields for this site will edit check against the Closed/Terminated Date entered to ensure meals are not claimed after this date.
6) When finished, select **Save**.

> **Note**: The Budget Detail should be revised after closing a site. Refer to section “5.6.4 Revise the Budget Detail” on page 37 for assistance.

5.6 Budget Detail

The Budget Detail form must be completed by all sponsors wishing to participate in the SFSP. All Site Applications should be completed before advancing to the Budget Detail form.

In addition, the Budget Detail must be completed if an advance request is submitted; however, the submission of an advance request occurs outside of the application packet process and must be separately reviewed and validated by the state.

5.6.1 Complete the Budget Detail

1) Access the application packet (page 26).
    a. New sponsors: Select **Add** next to the Budget Detail packet item.
    b. Returning sponsors: Select **Modify** next to the Budget Detail packet item to review prepopulated data.
2) The Budget Detail form will display. Provide the requested information.
    a. It is recommended to save the form every 5-10 minutes to prevent the system from timing out.
3) Each time the form is saved, a confirmation message will display, informing the user of the form's status. If any errors and/or warnings are noted, select **< Edit** to return to the form and make the necessary corrections.
4) Once the form is free of errors, the confirmation message will show that "The form has been validated without errors." Select **Finish** to return to the application packet.

5.6.2 Modify the Budget Detail

Modifications can be made to the Budget Detail until it is submitted as part of the application packet to the state for approval. Once the Budget Detail is in "Approved" status, a revision must be created if changes are desired.

1) Access the application packet (page 26).
2) Select **Modify** next to the Budget Detail packet item.
3) The Budget Detail form will display. Make the necessary changes.
4) When finished, select **Save**.

5.6.3 Delete the Budget Detail

The Budget Detail cannot be deleted once the application packet is in "Approved" status. Once the Budget Detail has been deleted, it is permanently removed from the system and cannot be restored.

1) Access the application packet (page 26).
2) Select **Modify** next to the Budget Detail packet item.
3) The Budget Detail form will display. Select **Delete** from the Screen Options menu in the upper right-hand corner.
4) A warning message will display. Select the **Delete** button to confirm.

5.6.4 Revise the Budget Detail

If changes to the Budget Detail are needed after the form has been approved, a revision must be created.

1) Access the application packet (page 26).
2) Select **Revise** next to the Budget Detail packet item.
3) The Budget Detail form will display, populated with data from the most recently approved version. Make the necessary changes and select **Save**.
4) Revision of the Budget Detail requires resubmission of the entire application packet. Return to the application packet screen and select **Submit for Approval**.

5.6.5 View Budget Detail History

If there are multiple versions of the Budget Detail within the system (i.e., revisions exist), the system defaults to the latest version. All versions are accessible and can be viewed.

1) Access the application packet (page 26).
2) Select the **Version Link** in the Latest Version column of the Budget Detail packet item.

Packet Assigned To: unassigned

Action	Form Name	Latest Version	Status
View | Revise	✔ Sponsor Application	Original	Approved
Details	✔ Management Plan	Original	Approved
View | Modify	Budget Detail	Rev. 1	Pending Validation

3) The Sponsor Budget History screen will display. Select the **Version** you wish to view. The associated Budget Detail will display.

5.7 Site Field Trip List

The Site Field Trip List contains information about field trips that approved sites will conduct within the specified program year.

> **Note**: Only approved sites can be associated with a site field trip. Therefore, the sponsor must return to the application packet once it is in "Approved" status to add Site Field Trip forms.

5.7.1 Add a Field Trip

Once an application packet has been approved, field trips can be added for participating sites. Adding a field trip will not alter the packet's status (i.e., the packet will remain in "Approved" status even with Site Field Trip forms awaiting review).

1) Access the application packet (page 26).
2) Select **Details** next to the Site Field Trip List packet item.
3) The Field Trips - Site List screen will display. Select **Create New Field Trip**.
4) The New Field Trip – Select a Site screen will display. Select a **Field Trip Site** from the drop-down menu and click **Continue**. (Only sites with an approved Site Application will be available for selection.)
5) A Site Field Trip form will display. Provide the requested information.
6) When finished, select **Save**. The field trip enters "Pending Approval" status until reviewed by the state.

5.7.2 Modify a Field Trip

1) Access the application packet (page 26).
2) Select **Details** next to the Site Field Trip List packet item.
3) The Field Trips - Site List screen will display. Select the **Field Trip Name**.
4) The associated Site Field Trip form will display. Make the necessary changes.
5) When finished, select **Save**.

5.7.3 Delete a Field Trip

Only field trips in “Pending Approval” status can be deleted. If you wish to remove an approved field trip, you must cancel the trip. Refer to section “5.7.4 Cancel a Field Trip” on page 39 for more information.

1) Access the application packet (page 26).
2) Select **Details** next to the Site Field Trip List packet item.
3) The Field Trips - Site List screen will display. Select the **Field Trip Name**.
4) The associated Site Field Trip form will display. Select **Delete** from the Screen Options menu in the upper right-hand corner.
5) A warning message will display. Select the **Delete** button to confirm the action.

5.7.4 Cancel a Field Trip

Once a field trip is approved, it can no longer be deleted. Instead, it must be cancelled.

1) Access the application packet (page 26).
2) Select **Details** next to the Site Field Trip List packet item.
3) The Field Trips - Site List screen will display. Select the **Field Trip Name**.
4) The associated Site Field Trip form will display. Select the **Cancel Request** checkbox and enter a reason in the Comments textbox, if needed.
5) When finished, select **Save**. The field trip will enter “Approved – Cancelled” status.


2023 - 2024 Field Trips - Site List

000 Status: Active
Test Sponsor
DBA:
123 Test Lane
Test City, AL 12345
County: Autauga
FEIN: 12-3456789

Site	Field Trip Name	Date	Status
Test Site 1	Test	3/1/2024	Approved - Cancelled

> **Note**: Cancelling a field trip cannot be undone. If a trip was cancelled in error, a new Site Field Trip form must be created and submitted.

5.8 Checklist Summary

The Checklist Summary contains supplemental documents that are required before the packet can be submitted to the state. The number in parenthesis next to the Checklist Summary packet item identifies the number of supplemental documents (e.g., Checklist Summary (8) indicates there are eight additional documents that must be completed).

The number of Checklist items may change as you complete other portions of the application packet; this is because answers within the Sponsor Application and Site Application(s) will affect which supplemental documents comprise your Checklist as will your status as a new vs. renewing sponsor.

5.8.1 Complete the Checklist Summary

1) Access the application packet (page 26).
2) Select **Details** next to the Checklist Summary packet item.
3) The Checklist Summary will display, providing a list of the required forms at the sponsor and site level. The number of required forms at each level are indicated in the "Total Items" column. Select a **Sponsor** or **Site Name** to access the associated forms.
4) A Checklist of required forms will display.
   a. If you have submitted the required form via mail or email, select the **Document Submitted to State Agency** checkbox. The current date will populate in the **Date Submitted to State Agency** field. This field can be modified, if needed.
   b. If you wish to upload the required form, select the **Attachment** icon. A Checklist File Upload Detail screen will display. Select **Choose File** to open the desired file from your computer. Enter any additional comments, if needed. When finished, select **Save**. A confirmation message will display. Select **Finish** to return to the Checklist. The uploaded checklist item is accessible in the Attachments section at the bottom of the screen. Make sure to select the **Document Submitted to State Agency** checkbox next to the uploaded item.
5) Repeat step 4 for all required forms of the selected Checklist. When finished, select **Save** at the bottom of the Checklist screen.

6) A confirmation message will display, informing you that “The Checklist has been saved.” Select **Finish** to return to the Checklist Summary screen.

> **Note**: Checklist items with an asterisk (*) to the left of their name are not required for submission of the application packet.

5.9 Application Packet Notes for Sponsor

ALSDE can leave notes for the sponsor as they review the application packet. These can be viewed via the Application Packet Notes for Sponsor packet item.

5.9.1 View Application Packet Notes for Sponsor

1) Access the application packet (page 26).
2) Select **View** next to the Application Packet Notes for Sponsor packet item.
3) The Application Packet Notes for Sponsor screen will display. All notes entered to the sponsor will display in view-only mode.
4) Select **< Back** when ready to return to the application packet.

5.10 Attachment List

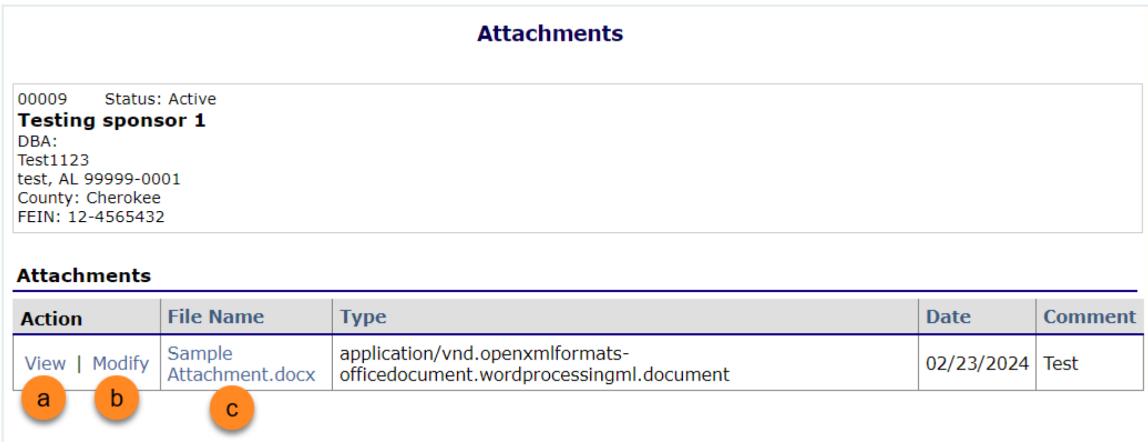
The Attachment List enables the sponsor and state to upload documents and files to the application packet for centralized storage.

5.10.1 Add an Application Packet Attachment

1) Access the application packet (page 26).
2) Select **Details** next to the Attachment List packet item.
3) The Attachments screen will display. Select **Add Attachment**.
4) The Attachment Detail screen will display. Select **Choose File** to open the desired file from your computer.
5) Add any additional comments, if necessary.
6) When finished, select **Save**.

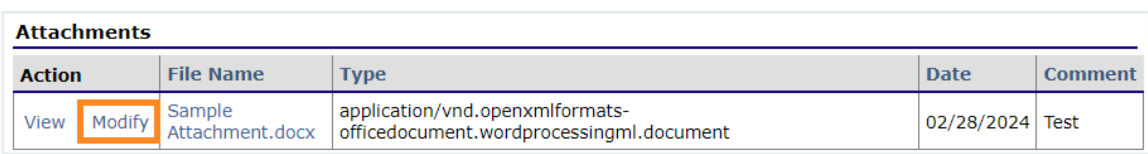
5.10.2 View or Modify an Application Packet Attachment

1) Access the application packet (page 26).
2) Select **Details** next to the Attachment List packet item.
3) The Attachments screen will display.
    a. Select **View** to see the attachment details (file name, size, date attached, etc.) in view-only mode. When finished, select **< Back** to return to the Attachments screen.
    b. Select **Modify** to update the attachment comments. When finished, select **Save**.
    c. Select the **File Name** to download the attachment to your computer.



5.10.3 Delete an Application Packet Attachment

1) Access the application packet (page 26).
2) Select **Details** next to the Attachment List packet item.
3) The Attachments screen will display. Select **Modify** next to the attachment to be deleted.



4) The Attachment Detail screen will display. Select **Delete** from the Screen Options menu in the upper right-hand corner.
5) A warning message will display. Select the **Delete** button to confirm the action.

5.11 Complete SFSP Application Packet Submission

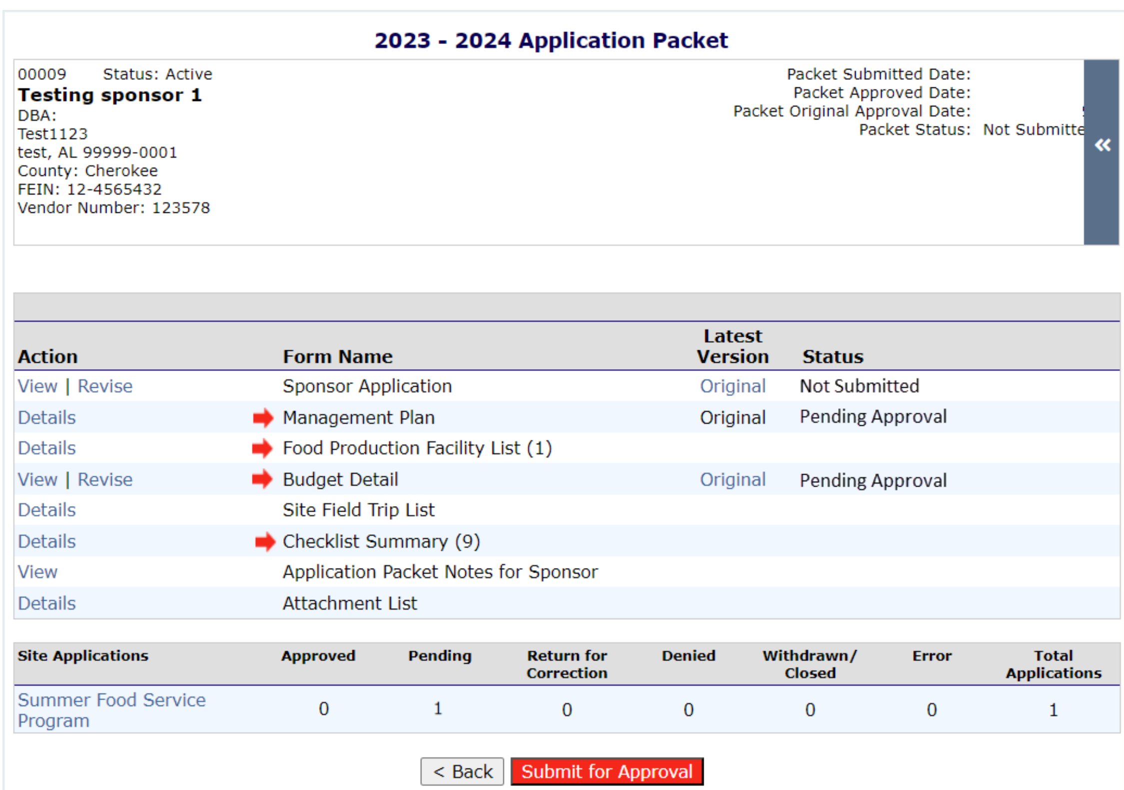
A sponsor can submit the SFSP application packet to the state once it is deemed complete by the system, which requires completion of the following:

- Sponsor Application
- Management Plan
- Food Production Facility List
- Site Application(s)
- Budget Detail
- Checklist items

> **Note**: When the above packet items have been completed and no errors are identified by the system, the Submit for Approval button at the bottom of the application packet will become enabled.

5.11.1 Submit the SFSP Application Packet for Review

1) Access the application packet (page 26).
2) Review all packet components a final time. Ensure everything has been completed accurately to the best of your knowledge.
3) When finished, select **Submit for Approval**.



2023 - 2024 Application Packet

00009 Status: Active
Testing sponsor 1
DBA:
Test1123
test, AL 99999-0001
County: Cherokee
FEIN: 12-4565432
Vendor Number: 123578

Packet Submitted Date:
Packet Approved Date:
Packet Original Approval Date:
Packet Status: Not Submitte

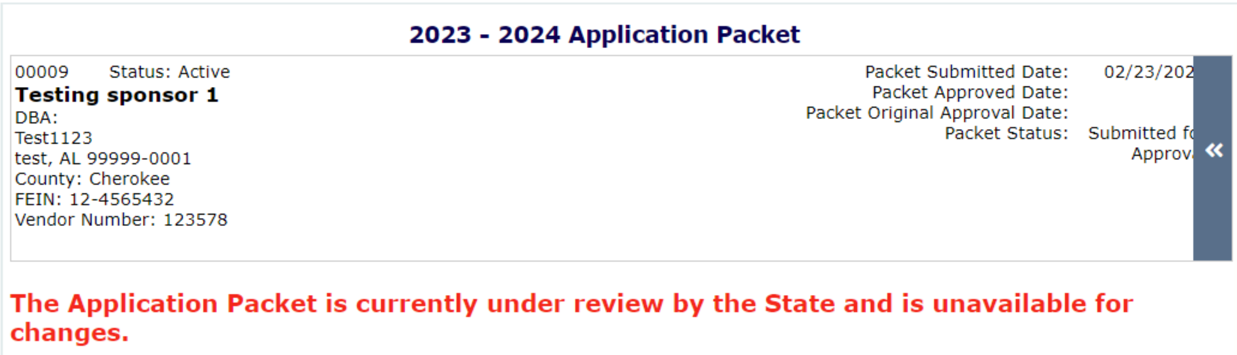
Action	Form Name	Latest Version	Status
View | Revise	Sponsor Application	Original	Not Submitted
Details	Management Plan	Original	Pending Approval
Details	Food Production Facility List (1)		
View | Revise	Budget Detail	Original	Pending Approval
Details	Site Field Trip List		
Details	Checklist Summary (9)		
View	Application Packet Notes for Sponsor		
Details	Attachment List		

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

< Back | Submit for Approval

5.11.2 View the Status of the Application Packet

You can return to the submitted application packet at any time to view the packet's status. While a packet is under review, all packet items will be in view-only mode for sponsor users, and the warning message "The Application Packet is under review by the State and is unavailable for changes." will display in red text at the top of the packet.


2023 - 2024 Application Packet

00009 Status: Active
Testing sponsor 1
DBA:
Test1123
test, AL 99999-0001
County: Cherokee
FEIN: 12-4565432
Vendor Number: 123578

Packet Submitted Date: 02/23/202
Packet Approved Date:
Packet Original Approval Date:
Packet Status: Submitted fo
Approv

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

Once the packet is approved, the Packet Approval Date field will populate, and the Packet Status field will show "Approved." If corrections are required, the packet will display in "Returned" status. The sponsor must access the forms in "Denied" status to make the necessary corrections. Once all corrections have been made, resubmit the packet.

6.0 Claims

A sponsor submits a reimbursement claim to the state for every month in which one or more sites participate in the SFSP. Sponsor and site information may be entered into the monthly claim form beginning at the first of every month. Sponsors have 60 days from the last day of the claim month/year to submit an original claim.

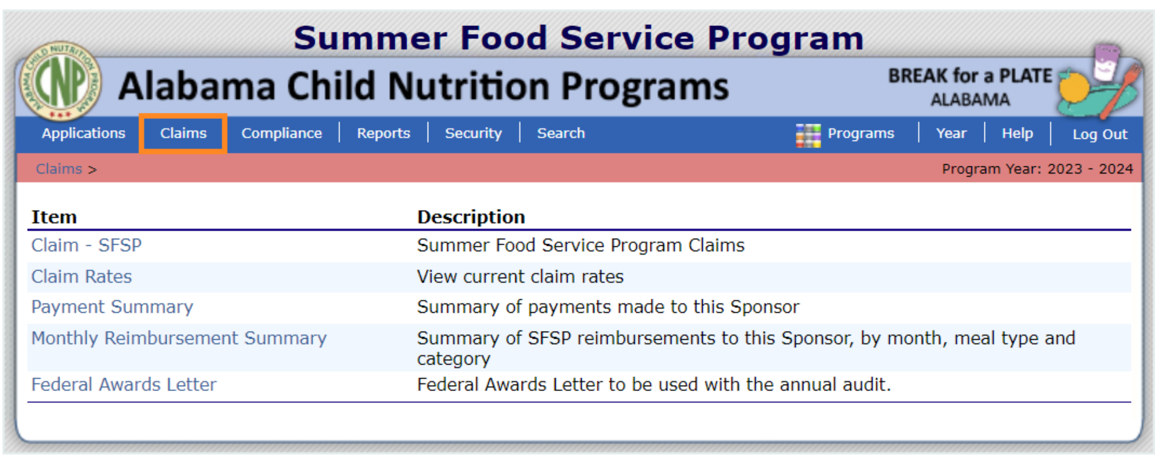
At the time claims are submitted, the submitted claim is reviewed by the system to ensure that it conforms to established business rules governing reimbursement claim eligibility and approval. Claims cannot be created for a month if there is no approved application packet in effect for that period.

> **Note**: Claim date definitions are provided in Appendix D on page 82 and all possible claim statuses are defined in Appendix E on page 83.

6.1 Access the Claims Menu

The Claims menu is where sponsors will access all SFSP claims functions.

1) Log in to the system and choose the **SFSP** module.
2) Select **Claims** from the main menu (located in the header). The Claims menu will display.



6.2 Sponsor-Level Claim Entry

The Claim Entry (Claim - SFSP) function enables sponsor users to submit and manage their SFSP claims. The system provides the ability to submit claims at the sponsor or site level. Original and upward-adjusted claims cannot be submitted if the received date is more than 60 days past the last day of the claim month/year. To create a claim, an approved application packet must be in effect for the claim period. The following sub-sections are intended for sponsors submitting claims at the sponsor level.

6.2.1 Submit a Sponsor-Level Claim

Claims can be entered for each eligible month in the program year. Eligible months are determined based on the approved Sponsor and Site Applications in the application packet.

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month** for which the claim will be entered.
4) The Claim Month Details screen will display. Select **Add Original Claim**.
5) The Sponsor Claim for Reimbursement screen will display. Provide the requested information.
    a. Sponsors can combine claim months with less than or equal to 10 operating days. Locate the **Combine month with*** checkboxes and select the desired month to combine the selected claim month with the current claim month.
6) When finished, select **Save and Validate Claim**.
7) The Claim Month Details screen will display. Review the information. Read the Certification statement and select the **Certification** checkbox.
8) Select **Submit for Payment** to submit the claim for payment.
    a. When the Submit for Payment button is selected, the system performs additional checks. If the system identifies errors, the errors must be corrected before the user can submit the claim for payment. Select **< Correct Now** to return to the claim.
9) Once the claim is error free and submitted for payment, a confirmation message will display. A confirmation number is generated, and an email is sent to the designated sponsor contact. Select **Finished** to return to the Claim Month Details screen.

6.2.2 View a Sponsor-Level Claim

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month**.
4) The Claim Month Details screen will display. Select **View** next to the claim.
5) The Sponsor Claim for Reimbursement screen will display. Review the information.
6) Select **< Back** when ready to return to the Claim Month Details screen.

6.2.3 Modify a Sponsor-Level Claim

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month**.
4) The Claim Month Details screen will display. Select **Modify** next to the claim.
5) The Sponsor Claim for Reimbursement screen will display. Make the necessary changes.
6) When finished, select **Save and Validate Claim**.
7) The Claim Month Details screen will display. Review the information. Read the Certification statement and select the **Certification** checkbox.
8) Select **Submit for Payment** to submit the claim for payment.
    a. When the Submit for Payment button is selected, the system performs additional checks. If the system identifies errors, the errors must be corrected before the user can submit the claim for payment. Select **< Correct Now** to return to the claim.
9) Once the claim is error free and submitted for payment, a confirmation message will display. A confirmation number is generated, and an email is sent to the designated sponsor contact. Select **Finished** to return to the Claim Month Details screen.

6.2.4 Delete a Sponsor-Level Claim

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

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month**.
4) The Claim Month Details screen will display. Select **Modify** next to the claim.
5) The Sponsor Claim for Reimbursement screen will display. Select **Delete** from the Screen Options menu in the upper-right corner.
6) A warning message will display at the bottom of the screen. Select the **Delete** button to confirm the action.

6.2.5 Revise a Sponsor-Level Claim

Claims in "Accepted*" or "Processed" status cannot be modified. Instead, a revision must be created and submitted to the state for approval.

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month**.
4) The Claim Month Details screen will display. Select **Add Revision**.
5) The Sponsor Claim for Reimbursement screen will display. Make the necessary revisions.
6) When finished, select **Save and Validate Claim**.
7) The Claim Month Details screen will display. Review the information. Read the Certification statement and select the **Certification** checkbox.
8) Select **Submit for Payment** to submit the claim for payment.
    a. When the Submit for Payment button is selected, the system performs additional checks. If the system identifies errors, the errors must be corrected before the user can submit the claim for payment. Select **< Correct Now** to return to the claim.
9) Once the claim is error free and submitted for payment, a confirmation message will display. A confirmation number is generated, and an email is sent to the designated sponsor contact. Select **Finished** to return to the Claim Month Details screen.

6.2.6 View a Sponsor-Level Claim Summary

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month**.
4) The Claim Month Details screen will display. Select **View** next to the claim.
5) The Claim for Reimbursement Summary screen will display in view-only mode. Review the information.
6) When finished, select **< Back** to return to the Claim Month Details screen.

6.3 Site-Level Claim Entry

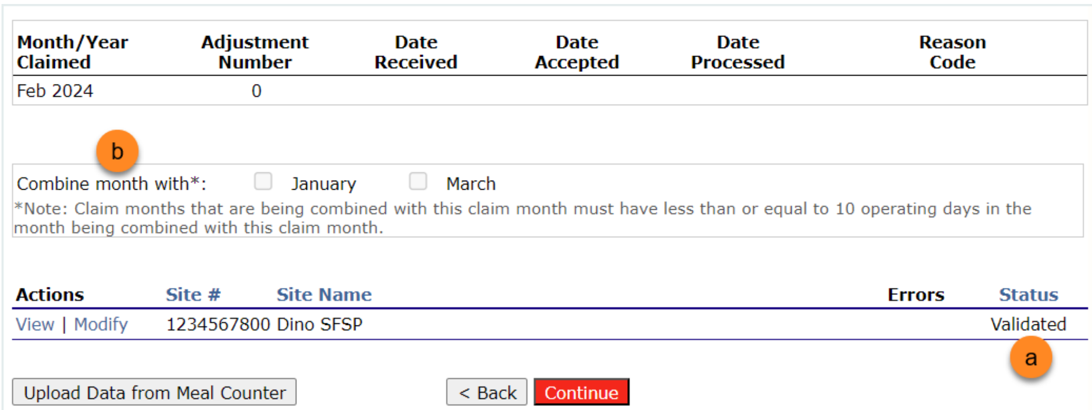
The Claim Entry (Claim - SFSP) function enables sponsor users to submit and manage their SFSP claims. The system provides the ability to submit claims at the sponsor or site level. Original and upward-adjusted claims cannot be submitted if the received date is more than 60 days past the last day of the claim month/year. To create a claim, an approved application packet must be in effect for the claim period. The following sub-sections are intended for sponsors submitting claims at the site level.

6.3.1 Submit a Site-Level Claim

Claims can be entered for each eligible month in the program year. Eligible months are determined based on the approved Sponsor and Site Applications in the application packet.

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month**.
4) The Claim Month Details screen will display. Select **Add Original Claim**.
5) The Claim Site List screen will display. Select **Add** to the left of the desired site to access the Site Claim Report screen.
6) Provide the requested information and select **Save**.
    a. A message will display, informing you of the saved form's status. If any issues exist, you will be notified that the form has been saved with errors and/or warnings. (Errors will prevent the form from being submitted, warnings will not.) If this occurs, select **< Edit** to return to the form and make the necessary corrections.

7) Once the form is saved successfully, a confirmation message "The Site Claim has been saved." will display. Select **Finish**.
8) Repeat steps 5-7 to enter all sites.
9) When finished entering claim data, select **Continue** on the Claim Site List screen.
    a. All sites entered should show in "Validated" status.
    b. Sponsors can combine claim months with less than or equal to 10 operating days. Locate the **Combine month with*** checkboxes and select the desired month to combine the selected claim month with the current claim month.



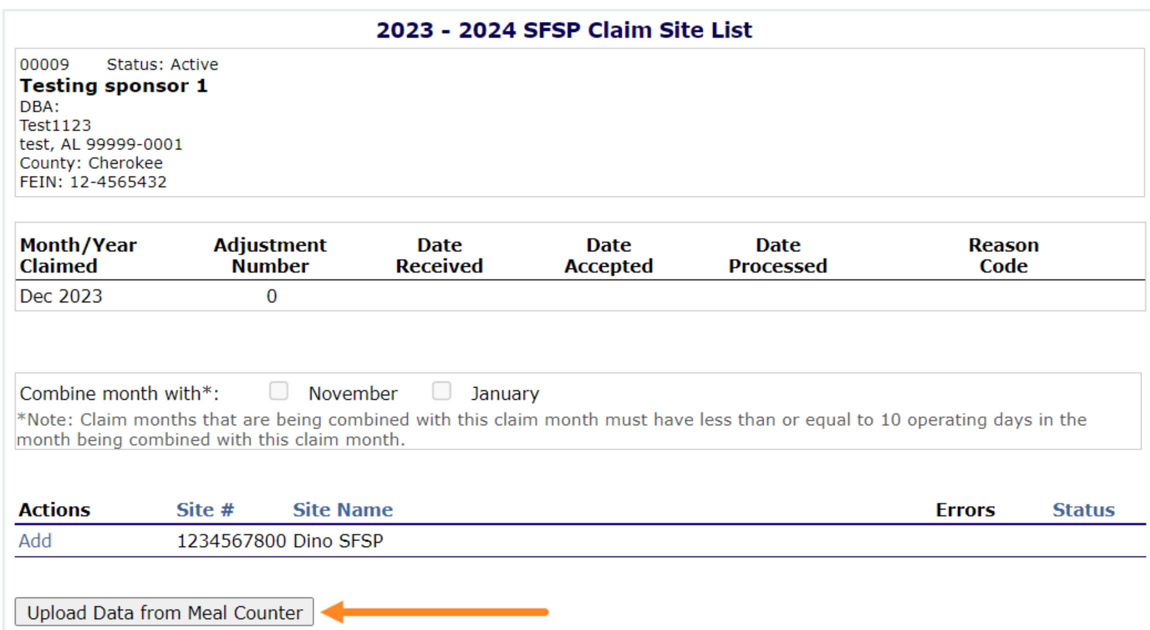
10) The Claim for Reimbursement – Sponsor Information screen will display. Review the information.
11) Select **Continue** at the bottom of the screen.
12) The Claim Month Details screen will display. Read the Certification statement and select the **Certification** checkbox.
13) Select **Submit for Payment** to submit the claim for payment.
    a. When the Submit for Payment button is selected, the system performs additional checks. If the system identifies errors, the errors must be corrected before the user can submit the claim for payment. Select **< Correct Now** to return to the claim.
14) Once the claim is error free and submitted for payment, a confirmation message will display. A confirmation number is generated, and an email is sent to the designated sponsor contact. Select **Finished** to return to the Claim Month Details screen.

6.3.2 Upload Claim Data from Meal Counter

For states utilizing LINQ Meal Counter to track site claims, data can be uploaded directly to your child nutrition program (CNP) management system for SFSP meals. This section provides an overview on uploading claim data from Meal Counter. For additional information on the LINQ Meal Counter system, please see the LINQ Meal Counter Sponsor User Manual.

> **Note**: Before uploading claim data from LINQ Meal Counter, it is recommended to review the Sponsor Monthly Meal Counts Report and the corresponding Excel download to ensure monthly data accuracy.

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month** for which the claim will be entered.
4) The associated Claim Month Details screen will display. Select **Add Original Claim**.
5) The Claim Site List screen will display. Select the **Upload Data from Meal Counter** button.



6) The system will upload data for the chosen claim month. Do not navigate away from the screen. Once the import process is complete, a confirmation screen will be displayed with any errors notated.

7) You will be returned to the Claim Site List screen. If all sites are in "Validated" status, select **Continue**.
8) The Claim for Reimbursement – Sponsor Information screen will display. Review the information.
9) Select **Continue** at the bottom of the screen.
10) The Claim Month Details screen will display. Read the Certification statement and select the **Certification** checkbox.
11) Select **Submit for Payment** to submit the claim for payment.
    a. When the Submit for Payment button is selected, the system performs additional checks. If the system identifies errors, the errors must be corrected before the user can submit the claim for payment. Select **< Correct Now** to return to the claim.
12) Once the claim is error free and submitted for payment, a confirmation message will display. A confirmation number is generated, and an email is sent to the designated sponsor contact. Select **Finished**.

> **Note**: Using the LINQ Meal Counter claim upload function to modify an existing claim will clear all previous data in the system and replace it with the uploaded data.

6.3.3 View a Site-Level Claim

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month**.
4) The Claim Month Details screen will display. Select **View** next to the claim.
5) The Claim Site List screen will display. Locate the desired site and select **View**.
6) The Site Claim Report will display in view-only mode. Review the information.
7) Select **< Back** at the bottom of the screen when ready to return to the Claim Site List screen.

6.3.4 Modify a Site-Level Claim

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month**.
4) The Claim Month Details screen will display. Select **Modify** next to the claim.
5) The Claim Site List screen will display. Locate the desired site and select **Modify**.
6) The Site Claim Report will display. Make the necessary changes and select **Save**.
7) Once the form is saved successfully, a confirmation message "The Site Claim has been saved." will display. Select **Finish**.
8) Repeat steps 5-7 to for all sites requiring modifications.
9) When finished, select **Continue** at the bottom of the Claim Site List screen.
10) The Claim for Reimbursement – Sponsor Information screen will display. Review the information.
11) Select **Continue** at the bottom of the screen.
12) The Claim Month Details screen will display. Read the Certification statement and select the **Certification** checkbox.
13) Select **Submit for Payment** to submit the modified claim for payment.
    a. When the Submit for Payment button is selected, the system performs additional checks. If the system identifies errors, the errors must be corrected before the user can submit the claim for payment. Select **< Correct Now** to return to the claim.
14) Once the claim is error free and submitted for payment, a confirmation message will display. A confirmation number is generated, and an email is sent to the designated sponsor contact. Select **Finished** to return to the Claim Month Details screen.

6.3.5 Delete a Site-Level Claim

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

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month**.
4) The Claim Month Details screen will display.
    a. To delete the entire claim (i.e., all site data), remain on the Claim Site List screen. Select **Delete** from the Screen Options menu in the upper-right corner and advance to step 5.

    b. To delete an individual site from the claim, locate the desired site and select **Modify**. The Site Claim Report will display. Select **Delete** from the Screen Options menu in the upper-right corner and advance to step 5.

5) A warning message will display at the bottom of the screen. Select the **Delete** button confirm the action.

> **Note**: Once a claim has been deleted, it is permanently removed from the system and cannot be restored. Use caution when deleting a claim.

6.3.6 Revise a Site-Level Claim

Claims in “Accepted*” or “Processed” status cannot be modified. Instead, a revision must be created and submitted to the state for approval.

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month**.
4) The Claim Month Details screen will display. Select **Add Revision**.
5) The Claim Site List screen will display. Locate the desired site and select **Revise**.
6) The Site Claim Report will display. Make the necessary changes and select **Save**.
7) Once the form is saved successfully, a confirmation message “The Site Claim has been saved.” will display. Select **Finish**.
8) Repeat steps 5-7 for all sites requiring revision.
9) When finished making revisions, select **Continue** at the bottom of the Claim Site List screen.
10) The Claim for Reimbursement – Sponsor Information screen will display. Review the information.
11) Select **Continue** at the bottom of the screen.
12) The Claim Month Details screen will display. Read the Certification statement and select the **Certification** checkbox.
13) Select **Submit for Payment** to submit the revised claim for payment.
    a. When the Submit for Payment button is selected, the system performs additional checks. If the system identifies errors, the errors must be corrected before the user can submit the claim for payment. Select **< Correct Now** to return to the claim.
14) Once the claim is error free and submitted for payment, a confirmation message will display. A confirmation number is generated, and an email is sent to the designated sponsor contact. Select **Finished** to return to the Claim Month Details screen.

6.3.7 View a Site-Level Claim Summary

The Claim Summary provides the ability to view a summary of the month's claim in an easy-to-read format. A Claim Summary is not available until a claim has been submitted with no errors.

1) Access the Claims menu (page 45).
2) Select **Claim - SFSP**.
3) The Claim Year Summary screen will display. Select the **Claim Month**.
4) The associated Claim Month Details screen will display. Select **Summary**.
5) The Claim for Reimbursement Summary screen will display in view-only mode. Review the information.
    a. Select the **Show Site Meal Details** link at the bottom of the screen to open the Site Meal Totals section, which will display view meal total breakdowns by site.
    b. Select the **Hide Site Meal Details** link to close the Site Meal Totals section.
6) When finished reviewing the information, select **< Back** to return to the Claim Month Details screen.

6.4 Claim Rates

The Claim Rates function enables users to view claim for reimbursement rates by program year. The rates displayed apply to the rate year defined at the top of the page. Meals are reimbursed based on the rate established by the USDA. The reimbursement rates are entered annually by authorized ALSDE staff.

6.4.1 View Claim Rates

The Claim Rates screen defaults to the current program year.

1) Access the Claims menu (page 45).
2) Select **Claim Rates**.
3) The Claim Rates for SFSP screen will display. This screen is view only. When finished reviewing the information, select **< Back**.

6.5 Payment Summary

The Payment Summary function enables users to view a list of all payment batch schedules processed for the sponsor within the selected program year. Each schedule number and process date represent payments that have been scheduled. Payments from payment batches are grouped by program and sorted by date.

6.5.1 View a Payment Summary

1) Access the Claims menu (page 45).
2) Select **Payment Summary**.
3) The Payment Summary List will display. Select a **Schedule Number**.
4) The payment summary information will display for all payments included in the selected batch. When finished reviewing the information, select **< Back** to return to the Payment Summary List.

6.6 Monthly Reimbursement Summary

The Monthly Reimbursement Summary function enables sponsor users to view a summary of their SFSP reimbursements organized by claim month.

6.6.1 View a Monthly Reimbursement Summary

1) Access the Claims menu (page 45).
2) Select **Monthly Reimbursement Summary**.
3) The Monthly Reimbursement Summary Information screen will display.
    a. Select a **Claim Date** to access the associated Claim for Reimbursement Summary. Select **< Back** when ready to return to the Monthly Reimbursement Summary Information screen.
4) When finished reviewing the information, select **< Back** to return to the Claims menu.

6.7 Federal Awards Letter

The Federal Awards Letter function enables sponsors to access and print their Federal Awards Letter for the current program year.

6.7.1 Access the Federal Awards Letter

1) Access the Claims menu (page 45).
2) Select **Federal Awards Letter**.
3) The Federal Awards Letter for the current program year will display.
    a. Select **Print This Page** to print the letter.
    b. Select **< Back** when finished to return to the Claims menu.

7.0 Compliance

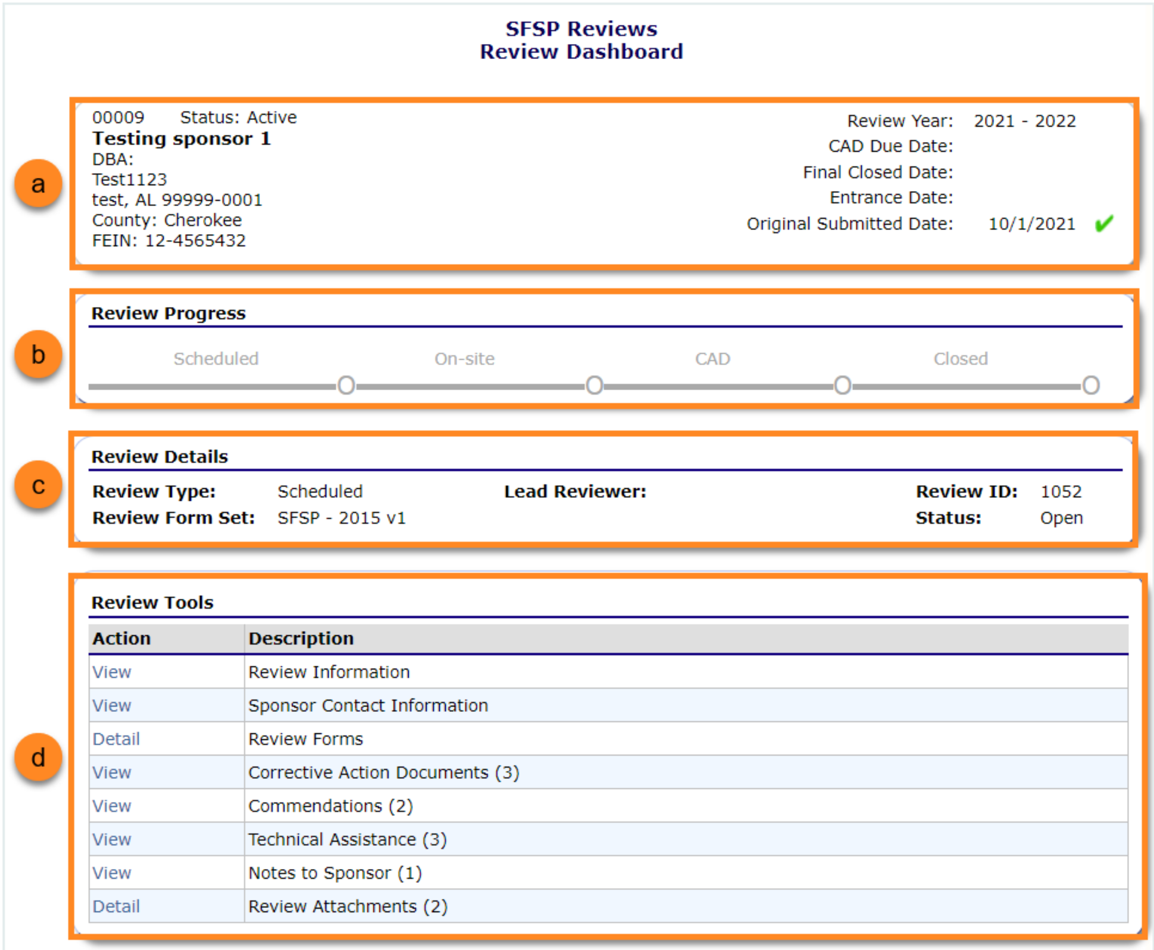
If sponsors are only granted access to the Review Dashboard, no Compliance menu will display. Instead, when the user selects **Compliance** from the main menu in the header, they will be taken directly to the SFSP Reviews screen.

7.1 Access the SFSP Review Dashboard

The SFSP Review Dashboard serves as the launching point for all sponsor tasks pertaining to an SFSP compliance review.

> **Note**: User access to the Review Dashboard review tools discussed in the following sections may vary; ALSDE determines which components of the review sponsor users will be able to view and/or modify.

1) Log in to the system.
2) Choose the **Summer Food Service Program** module.
3) Select **Compliance** from the main menu (located in the header).
4) The Compliance menu will display. Select **Review Tracking**. (If you are only granted access to the Review Tracking menu item, you will bypass the Compliance menu and advance directly to the SFSP Reviews screen).
5) The SFSP Reviews screen will display, listing all scheduled reviews. Select **Details** to the left of the desired review.
6) The Review Dashboard will display.
    a. Sponsor information and important review dates (e.g., corrective action document (CAD) due date, final closed date, entrance date, original submitted date) are provided at the top of the dashboard.
    b. A Review Progress Bar enables users to view the review stages. A green checkmark indicates that the step has been completed.
    c. The Review Details section of the dashboard provides general review information (populated from the Review Information screen) such as the review type, review form set, review ID, etc.
    d. A list of Review Tools is available at the bottom of the dashboard. When applicable, a number in parenthesis is displayed after a menu item. This number indicates the respective count of associated items (e.g., a (1) next to Review Attachments indicates that one attachment has been uploaded to the review).



7.2 Review Information

The Review Information screen contains general administrative information about the review.

7.2.1 View Review Information

1) Access the SFSP Review Dashboard (page 59).
2) Select **View** next to the Review Information review tool.
3) The Review Information screen will display in view-only mode. When finished looking over the information, select **< Back** at the bottom of the screen to return to the SFSP Review Dashboard.

7.3 Sponsor Contact Information

The Sponsor Contact Information screen contains general contact information populated from the application packet. If the information presented on this screen is not correct, the SFSP Sponsor Application must be revised and resubmitted. Refer to section “5.2.4 Revise the Sponsor Application” on page 27 for assistance.

7.3.1 View Sponsor Contact Information

1) Access the SFSP Review Dashboard (page 59).
2) Select **View** next to the Sponsor Contact Information review tool.
3) The Sponsor Contact Information screen will display in view-only mode. When finished reviewing the information, select **< Back** at the bottom of the screen to return to the SFSP Review Dashboard.

7.4 Review Forms

If granted access, the sponsor can access the review forms completed by the state agency. Additionally, the state agency may leave comments for the sponsor on the review forms.

7.4.1 View a Review Form

1) Access the SFSP Review Dashboard (page 59).
2) Select **Detail** next to the Review Forms review tool.
3) The Review Forms screen will display. Select **View** to the left of the desired form to access the information in view-only mode.
    a. To view site-level review forms, select **Detail** to the left of the desired site (located beneath the “Sites” header) to access the associated forms. Select **View** next to the form.

−		Sites (2)		
	Detail	Dino SFSP		
	Detail	Testing Site		

4) The associated review form will open. Review the information. If a comment was left for the sponsor, it will display at the top of the form.
5) When finished reviewing the form, select **<< Back to Form List** at the bottom of the screen to return to the Review Forms screen.

7.5 Corrective Action Documents

The Corrective Action Documents review tool houses all findings documented by the state agency during the review.

7.5.1 View a Finding

All findings can be viewed via the Corrective Action Documents review tool. Findings that require corrective action will display in “Pending Action” status. Instructions for responding to corrective action can be found in section “7.5.2 Submit a Corrective Action Response” on page 63.

1) Access the SFSP Review Dashboard (page 59).
2) Select **View** next to the Corrective Action Documents review tool.
3) The SFSP Review Findings screen will display. Findings are organized by sponsor and site.
    a. To view a sponsor-level finding, locate the Sponsor Findings section and select **View** next to the desired finding.
    b. To view a site-level finding, locate the Site Findings section. Select a **Site ID** to access the findings of the associated site. Select **View** next to the desired finding.

Sponsor Findings

Not Started	Pending Action	Pending Submission	Pending Approval	Returned	Accepted	Total
0	1	0	0	0	1	2

Action	Area	Question	CAD?	Status	Due Date
View	100 - Review Information	101 - Names/Titles of Persons Interviewed:	Y	Closed	
View	800 - Civil Rights	801 - Is Program information made available to the public upon request?	Y	Pending Action	7/01/2022

Site Findings

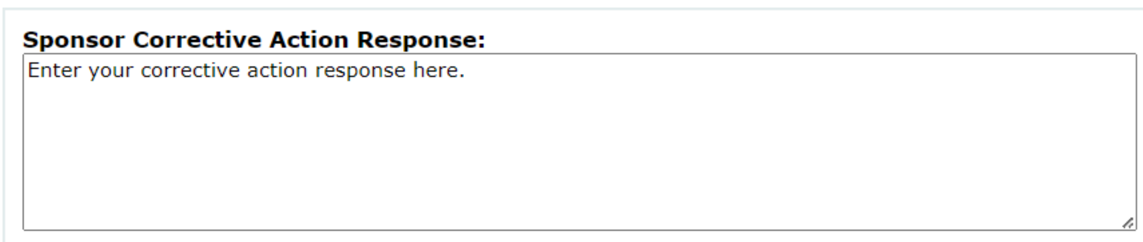
Site ID	Site Name	Not Started	Pending Action	Pending Submission	Pending Approval	Returned	Accepted	Total
0123456789	Testing Site	0	0	0	0	0	1	1
1234567800	Dino SFSP							

4) The associated Findings Details screen will display in view-only mode. When finished reviewing the information, select **< Back** to return to the Findings screen.

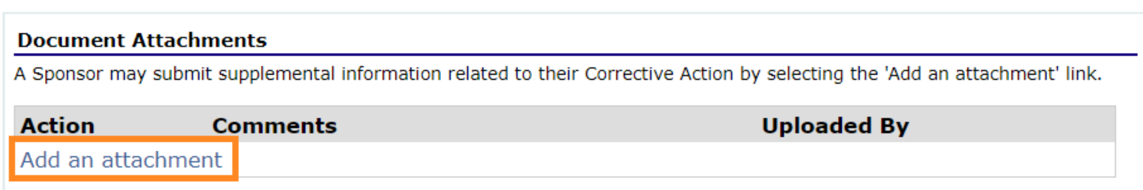
7.5.2 Submit a Corrective Action Response

Findings with required corrective action will display in "Pending Action" status on the SFSP Review Findings screen. To view all possible CAD statuses, refer to Appendix B on page 80.

1) Access the SFSP Review Dashboard (page 59).
2) Select **Modify** next to the Corrective Action Documents review tool.
3) The SFSP Review Findings screen will display. Findings are organized by sponsor and site.
    a. To respond to a sponsor-level finding, locate the Sponsor Findings section. Select **Modify** next to the desired finding.
    b. To respond to a site-level finding, locate the Site Findings section. Select a **Site ID** to access the findings of the associated site. Select **Modify** next to the desired finding.
4) The SFSP Review Findings Details screen will display. Review the finding description and required corrective action entered by the state agency.
5) Enter your response in the **Sponsor Corrective Action Response** textbox.



6) To add supplemental information related to the corrective action, locate the Document Attachments section and select the **Add an attachment** link. (If you do not wish to add an attachment and are finished responding to the corrective action, skip to step 8).



7) An Attachment pop-up window will display. Select **Choose File** and open the desired file from your computer. When finished, select **Upload**.
    a. Use the **View** and **Modify** links to manage your attachments.

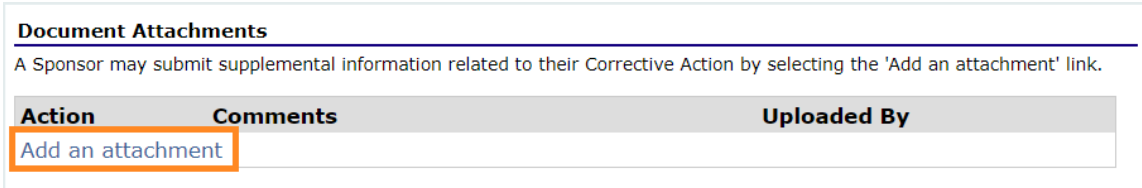
8) When finished responding to the corrective action, scroll down to the bottom of the screen and select:
    a. **Save** if you wish to the information entered but are not ready to submit your response to the state agency. The finding will enter "Pending Submission" status. Ensure you return and submit your response before the due date.
    b. **Submit for Acceptance** if you are ready to submit your response to the state agency for review. The finding will enter "Pending Approval" status.
9) If the state agency approves the corrective action response, the finding status will update to "Approved" and no further action is required. If the state agency does not approve the response, the finding status will update to "Denied." In this case, the sponsor must return to the finding and submit an updated corrective action response. Refer to section "7.5.3 Resubmit a Denied Response" on page 64 for more information.

7.5.3 Resubmit a Denied Response

If a sponsor's corrective action response is not approved by the state, it will be returned in "Denied" status. The sponsor must update and resubmit the response.

1) Access the SFSP Review Dashboard (page 59).
2) Select **Modify** next to the Corrective Action Documents review tool.
3) The SFSP Review Findings screen will display. Findings are organized by sponsor and site.
    a. To resubmit a sponsor-level finding, locate the Sponsor Findings section. Select **Modify** next to the desired finding in "Denied" status.
    b. To resubmit a site-level finding, locate the Site Findings section. Select a **Site ID** to access the findings of the associated site. Select **Modify** next to the desired finding in "Denied" status.
4) The associated SFSP Review Findings Details screen will display. Scroll down and locate the Reviewer Response to CAD section. Note the reviewer's feedback.
5) Locate the Sponsor Corrective Action Response section. Modify the previous response to address the reviewer's feedback.

6) To add supplemental information related to the corrective action, locate the Document Attachments section and select the **Add an attachment** link. (If you do not wish to add an attachment and are finished responding to the corrective action, skip to step 8).



7) An Attachment pop-up window will display. Select **Choose File** and open the desired file from your computer. When finished, select **Upload**.
    a. Use the **View** and **Modify** links to manage your attachments.
8) When finished responding to the corrective action, scroll down to the bottom of the screen and select:
    a. **Save** if you wish to the information entered but are not ready to submit your response to the state agency. The finding will enter "Pending Submission" status. Ensure you return and submit your response before the due date.
    b. **Submit for Acceptance** if you are ready to submit your response to the state agency for review. The finding will enter "Pending Approval" status.
9) If the state agency approves your corrective action response, the finding status will update to "Approved" and no further action is required. If the state agency does not approve the response, the finding status will update to "Denied." In this case, the sponsor must return to the finding and submit an updated corrective action response.

7.6 Commendations

The Commendations tool enables sponsor users to view commendations entered by the state during the review.

7.6.1 View a Commendation

1) Access the SFSP Review Dashboard (page 59).
2) Select **View** next to the Commendations review tool.
3) The SFSP Review Commendation screen will display. Commendations can be entered at the sponsor or site level. Locate a commendation and select **View**.
4) A Commendation pop-up window will display, allowing the user to read the state's full commendation. When finished, select **Cancel** to return to the SFSP Review Commendation screen.

7.7 Technical Assistance

The Technical Assistance tool enables sponsor users to view technical assistance documented by the state during the review.

7.7.1 View a Technical Assistance

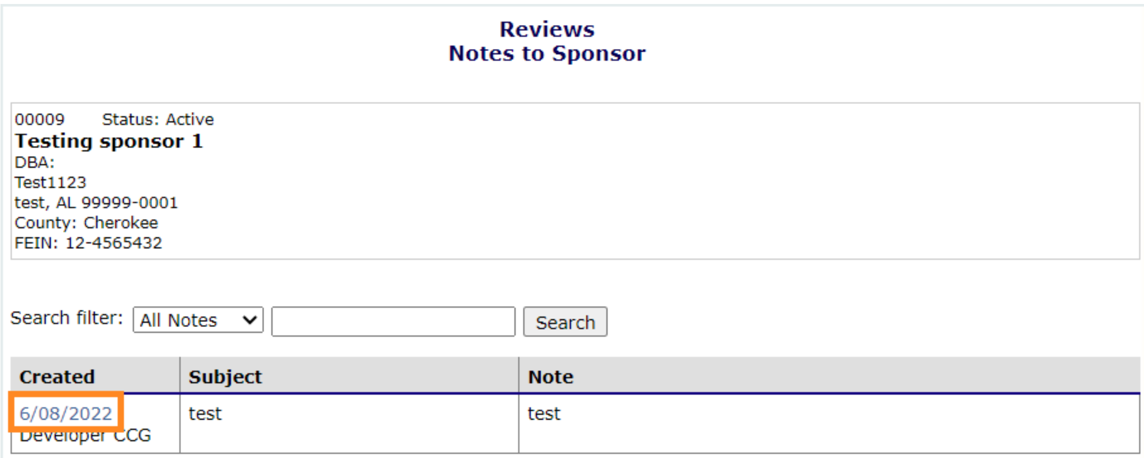
1) Access the SFSP Review Dashboard (page 59).
2) Select **View** next to the Technical Assistance review tool.
3) The SFSP Review Technical Assistance screen will display. Technical assistance can be entered at the sponsor or site level. Locate a technical assistance and select **View**.
4) A Technical Assistance pop-up window will display, allowing the user to view technical assistance details. When finished reviewing the information, select **Cancel** to return to the SFSP Review Technical Assistance screen.

7.8 Notes to Sponsor

The Notes to Sponsor tool enables sponsor users to view notes entered by the state reviewer.

7.8.1 Viewing a Note to Sponsor

1) Access the SFSP Review Dashboard (page 59).
2) Select **View** next to the Notes to Sponsor review tool.
3) The Reviews Notes to Sponsor screen will display. Select the **Created Date** of the note you would like to view.
   a. To narrow down notes displayed, use the **Search filter** drop-down to select a search criterion and enter a related key word/phrase in the Search textbox. When finished, select the **Search** button.



4) The note will display. When finished reviewing the information, select **< Back** to return to the Reviews Notes to Sponsor screen.

7.9 Review Attachments

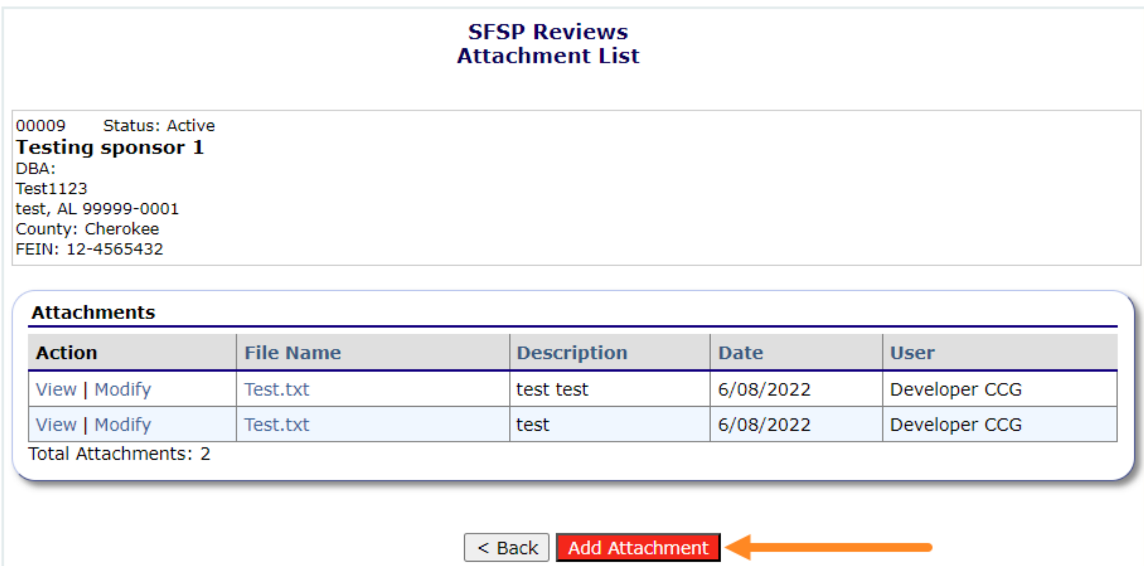
The Review Attachments review tool enables the state agency and/or sponsor to upload files to the review. Attachments uploaded via the Review Attachments tool must abide by the following business rules:

- Files must be .csv, .docx., .gif, .html, .jpg, .pdf, .png, .rtf, .xls, .xlsx, or .zip.
- A single file cannot exceed 15MB.

> **Note**: User permissions within the Review Attachments review tool may vary; ALSDE determines which users can view, add, modify, and/or delete review attachments.

7.9.1 Add a Review Attachment

1) Access the SFSP Review Dashboard (page 59).
2) Select **Detail** next to the Review Attachments review tool.
3) The SFSP Reviews Attachment List screen will display. Select **Add Attachment**.

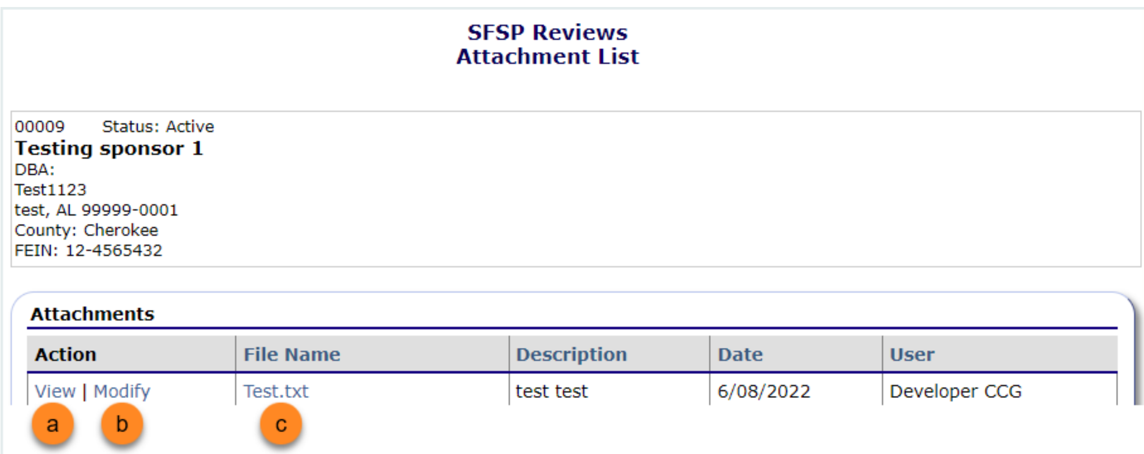


4) The SFSP Reviews Attachment Detail screen will display. Select **Choose File** and open the desired file from your computer.
5) Enter a file description in the textbox provided, if needed.
6) When finished, select **Save**.

7.9.2 View or Modify a Review Attachment

Users can view or modify the description of a review attachment. To make modifications to the file itself, you must delete the file and then add the new file in its place.

1) Access the SFSP Review Dashboard (page 59).
2) Select **Detail** next to the Review Attachments review tool.
3) The SFSP Reviews Attachment List screen will display.
    a. To view attachment information in view-only mode, select **View** next to the desired file. The SFSP Reviews Attachment Detail screen will display. When finished, select **< Back**.
    b. To modify an attachment, select **Modify** next to the desired file. The SFSP Reviews Attachment Detail screen will display. Make the necessary changes and select **Save**.
    c. To download the file to your computer, select the **File Name**.



7.9.3 Delete a Review Attachment

1) Access the SFSP Review Dashboard (page 59).
2) Select **Detail** next to the Review Attachments review tool.
3) The SFSP Reviews Attachment List screen will display. Select **Modify** next to the attachment to be deleted.
4) The SFSP Reviews Attachment Detail screen will display. Select **Delete** from the Screen Options menu in the upper-right corner.
5) A warning message will display. Select the **Delete** button to confirm the action.

8.0 Reports

The Reports component of the SFSP module enables users to run, view, and print reports containing data maintained within the system. The Report List contains all reports available within the SFSP module (to which the user has been granted access). Once a user selects a particular report, the system may prompt the user to enter additional parameters before the report is generated.

> **Note**: Report access is managed by the state. Not all sponsor users will be granted access to SFSP reports.

8.1 Generate a Report

1) Log in to the system.
2) Choose the **Summer Food Service Program** module.
3) Select **Reports** from the main menu (located in the header).
4) The Report List will display. Select the desired **Report Name**.
5) Some reports may require you to enter additional parameters before generating the report. Provide the request information.
6) Select **Create Report**. The report will open in a separate window.
    a. Microsoft Excel exports will have an **Export to Excel** button. Selecting this will download the Excel file to your computer.

> **Note**: When generating reports, the new report window may be unable to open if an ad blocker is enabled on your computer. Temporarily allow pop-ups to access the new report.

9.0 Security

The Security component of the SFSP module enables users to change their system password. If sponsors are only granted access to the Change Password function, no Security menu will display. Instead, when the user selects **Security** from the main menu, they will be taken directly to the Change Password screen.

9.1 Change Password

1) Log in to the system.
2) Choose the **Summer Food Service Program** module.
3) Select **Security** from the main menu (located in the header).
4) The Change Password screen will display. Provide the requested information to update your password. Make sure to follow the password guidelines provided on the right-hand side of the screen.
5) When finished, select **Save**. (The Save button will remain disabled until the password entered abides by all password guidelines.)

10.0 System Basics

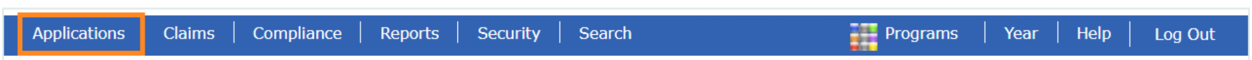
This section is intended to familiarize users with system navigation features as well as common form options.

10.1 Main Menu Links

Use the main menu located in the header to access SFSP functions, switch between programs, change the program year, view online help, or log out of the system. User access to the main menu items and their associated functions will vary depending on the user's security permissions.

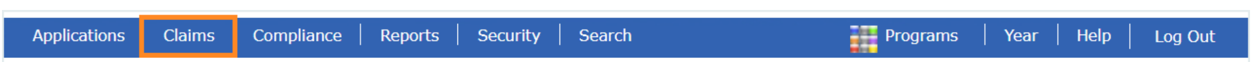
10.1.1 Applications Link

Select the **Applications** link to access the Applications menu, the starting point for all annual SFSP enrollment tasks.



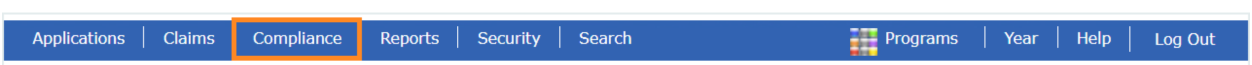
10.1.2 Claims Link

Select the **Claims** link to access the Claims menu, the starting point for all SFSP claims tasks such as submitting claims, viewing current claim rates, and viewing payment summaries.



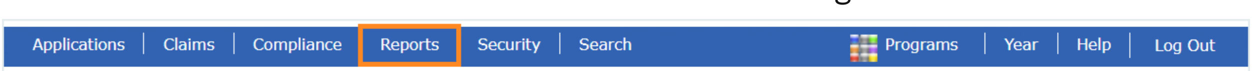
10.1.3 Compliance Link

Select the **Compliance** link to access the Compliance menu, the starting point for all sponsor tasks related to the management of SFSP compliance reviews.



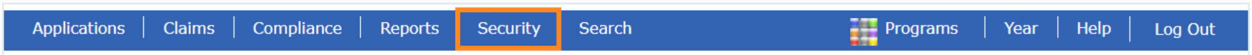
10.1.4 Reports Link

Select the **Reports** link to access the Report List, a list of all available reports within the SFSP module to which the user has been granted access.



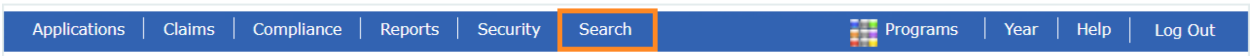
10.1.5 Security Link

Select the **Security** link to access to all available security functions within the SFSP module.



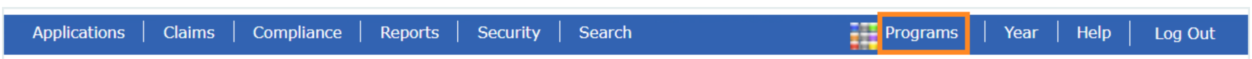
10.1.6 Search Link

Select the **Search** link to access the SFSP Search Options menu. This link is only available to users with access to more than one sponsor in the system.



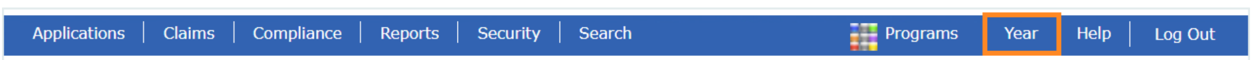
10.1.7 Programs Link

Select the **Programs** link to return to the Programs page and select a new module. Only users with access to multiple programs in the system will be able to select this link.



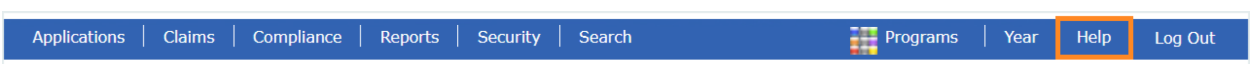
10.1.8 Year Link

Select the **Year** link to access the Year Select screen.



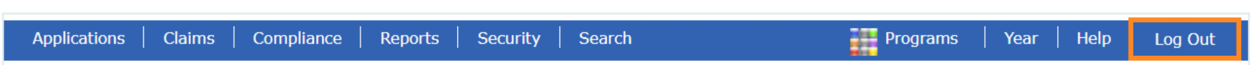
10.1.9 Help Link

Select the **Help** link to access online help.



10.1.10 Log Out Link

Select the **Log Out** link to securely log out of the system.



10.2 Breadcrumb Trail

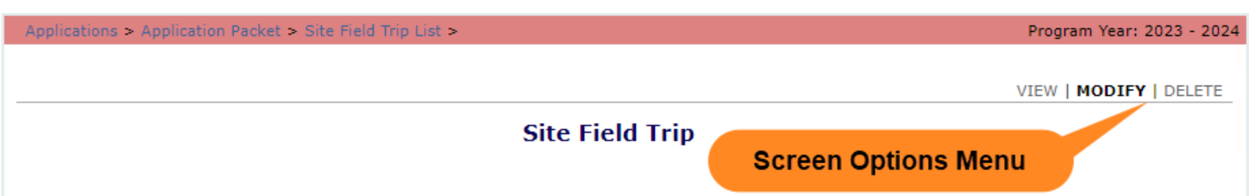
In the colored banner directly beneath the main menu (banner color will depend on the module), a string of links will display in the left-hand side as you navigate through different sections of the system. This string of links is referred to as the breadcrumb trail. It will show at the top of every screen, displaying each nested page as you navigate further into a function. The breadcrumb trail is intended to help you keep track of your location in the system and to allow you to easily return to a previous page, if needed.

10.3 Screen Options Menu

The Screen Options menu is located in the upper right-hand corner of all forms in the system (and can occasionally be found in the bottom right-hand corner as well). Sponsor users may see the following menu options:

- **View**: Enables the user to access the form in view-only mode.
- **Modify**: Enables the user to make changes to the form.
- **Delete**: Enables the user to remove the form and its associated data from the system.

When accessing a form, one of the links from the list above will show in bold font. This indicates the mode the form has been accessed in (e.g., if “View” is shown in bold, the form has been accessed in view-only mode).

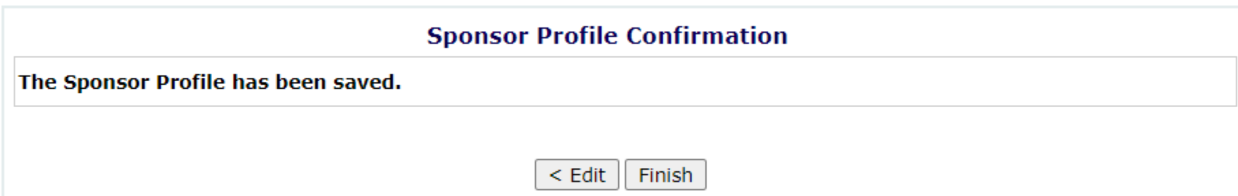


> **Note**: Not all menu options will be present on all forms. Only actions that abide by system business rules and that the user has been granted permission to perform will display.

10.4 Confirmation Message

A Confirmation message will display after saving a form in the system. This message offers two navigation options:

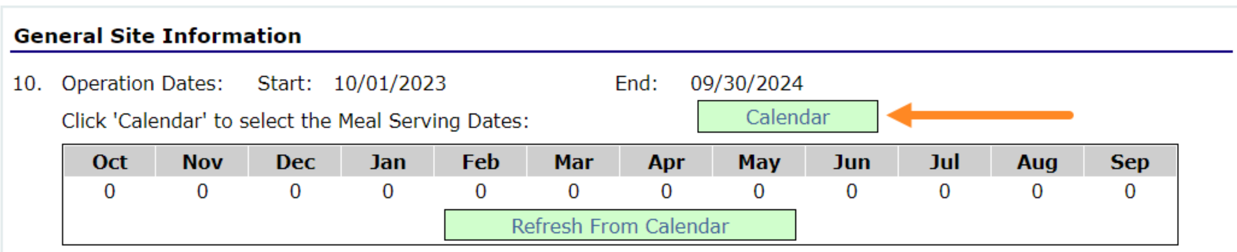
- **< Edit**: Return to the form in Modify mode to make additional changes.
  - Claim forms will also include **< Modify Claim** and **< Correct Now** buttons (depending on which check the system has performed). Both options return the user to the submitted claim form for modifications.
- **Finish**: Navigate away from the submitted form and return to the screen from which you accessed the form.



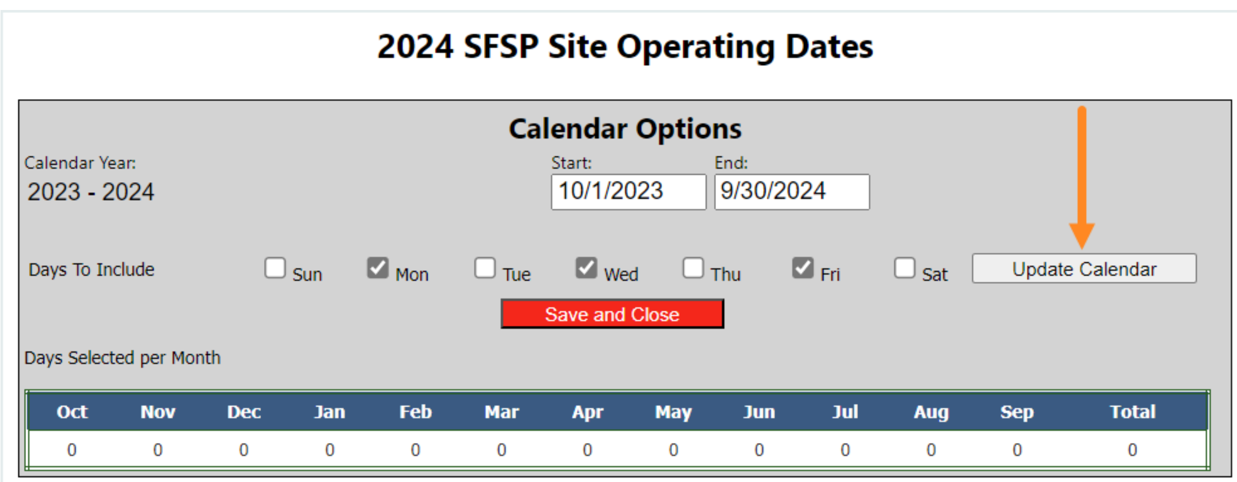
Appendices

Appendix A: Site Application Calendar Function

When completing or modifying an SFSP Site Application, sponsors will utilize the Calendar function to identify site operating dates and meal serving dates. To access the Calendar function, open the SFSP Site Application. Select the green **Calendar** button (the Calendar function is available within the General Site Information section as well as all subsequent Meal Type sections (e.g., Breakfast).

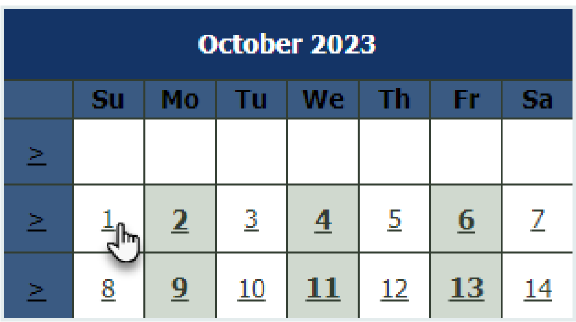


An SFSP Site Operating Dates or SFSP Site Meal Serving Dates pop-up will display. To include a specific day(s) for each week (within the dates of operation), use the **Days to Include** checkboxes and select the days of the week that meals will be served (e.g., if meals are served Mondays, Wednesdays, and Fridays of each week, select the Mon, Wed, and Fri checkboxes). Once the selections are made, click the **Update Calendar** button.

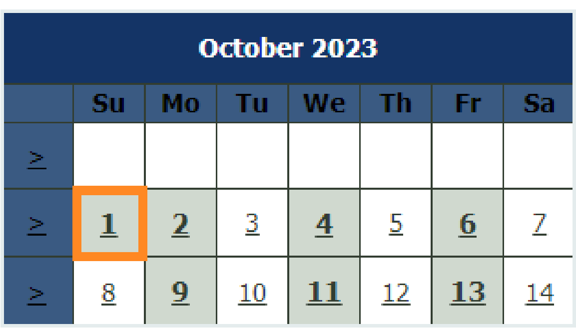


Days identified as meal serving days will be highlighted in green in the calendar months displayed below.

Alternatively, to manually add an individual meal serving day, locate and click the desired day within the associated calendar month.

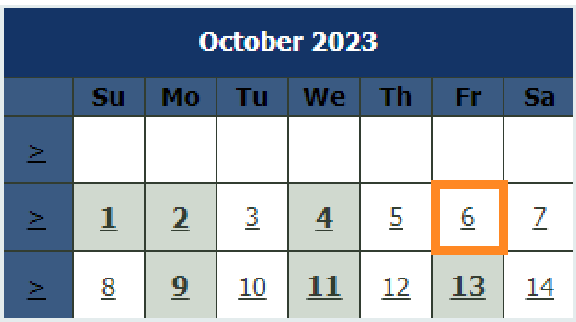


The selected day will become highlighted in green to indicate that it is now an identified meal serving day.

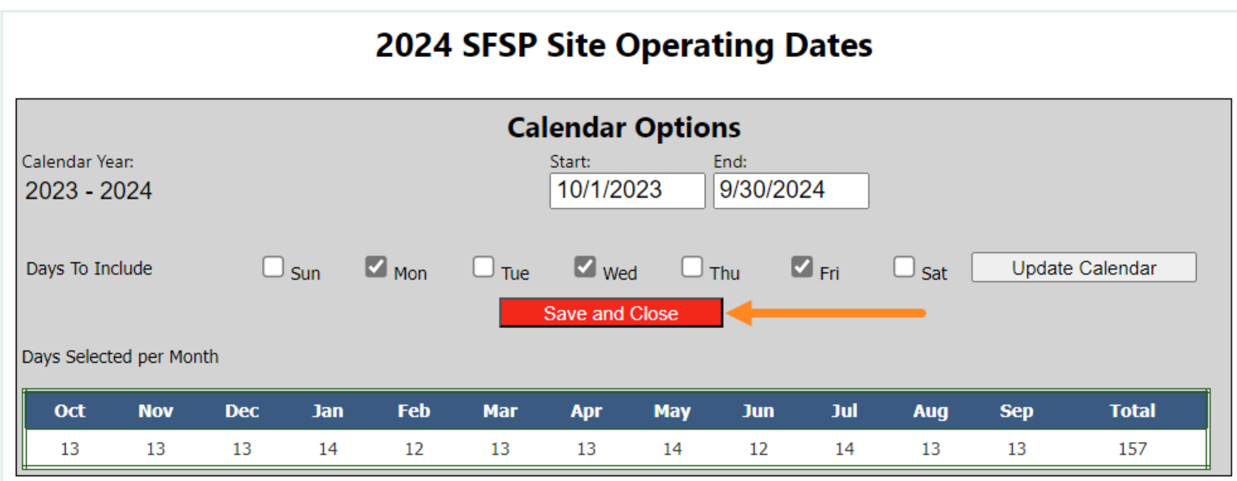


To manually remove an individual meal serving day, locate and click the desired day within the associated calendar month.

The selected day will no longer be highlighted in green, indicating that it is no longer a meal serving day.



Once all meal serving days have been identified, select the red **Save and Close** button in the Calendar Options section at the top of the screen.



You will be returned to the SFSP Site Application. Select the green **Refresh from Calendar** button.

General Site Information

10. Operation Dates: Start: 10/01/2023 End: 09/30/2024

Click 'Calendar' to select the Meal Serving Dates: Calendar

Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
0	0	0	0	0	0	0	0	0	0	0	0

Refresh From Calendar

The Meal Serving Date values for all operating months will update to reflect the meal serving dates identified on the SFSP Site Operating Dates or SFSP Site Meal Serving Dates pop-up.

General Site Information

10. Operation Dates: Start: 10/01/2023 End: 09/30/2024

Click 'Calendar' to select the Meal Serving Dates: Calendar

Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
13	13	13	14	12	13	13	14	12	14	13	13

Refresh From Calendar

Appendix B: CAD Statuses

The system automatically sets CAD statuses based on actions performed by the user. The following table defines the available CAD statuses and under what condition each status is set.

Table 2: Corrective Action Document Statuses

CAD Status	Definition
Not Started	Default status set by the system upon the creation of a finding.
Pending Action	Automatically set by the system when a corrective action has been added to a finding. The CAD is now awaiting sponsor action.
Pending Submission	Automatically set by the system when the Sponsor Corrective Action Response field has been completed and saved by the sponsor. The sponsor must return and submit the CAD before the due date.
Pending Approval	Automatically set by the system when the sponsor submits their CAD to the state for review by selecting the “Submit for Acceptance” button. The CAD is now awaiting state action.
Denied	Automatically set by the system when the state has selected the “CAD Not Approved” button. The CAD is now awaiting sponsor action.
Closed	Automatically set by the system when the state has selected the “Accept CAD” button. No further action is required by the state or sponsor.

Appendix C: Form and Application Statuses

Application packets and individual forms may be in varying statuses throughout the application packet submission process. Possible statuses are defined in the table below.

Table 3: Form and Application Statuses

Status	Description
Approved	Form/application has been approved by the state.
Submitted for Approval/ Pending Validation	The form/application has been submitted to the state and is awaiting review.
Approval Recommended	The form/application has been granted first-level approval and is now awaiting final approval. This status is for new sponsors, which require two levels of approval during their first program year application.
Not Submitted/ Incomplete	The form/application has not been submitted to the state for review.
Not Participating	No application packet was initiated for the program year, indicating that the sponsor is not participating in the program.
Returned for Corrections	The form/application was returned to the sponsor for corrections.
Denied	The form/application was denied by the state. An application in a status of “Approved” cannot be denied.
Withdrawn/Closed	The application was withdrawn or closed. Approved applications cannot be withdrawn.
Error	The form/application was saved with errors that must be corrected before it can be submitted to the state for review.

Appendix D: Claim Date Definitions

The table below lists and defines the various dates used throughout the claims functions of the system.

Table 4: Claim Date Definitions

Date	Definition
Date Created	This date is set to the current system date when the claim is initially created.
Date Modified	This date is set to the current system date when the claim is initially created and updated each time the claim is saved.
Date Received	This date is typically set to the date the claim was first submitted to the state. The date can be changed by an authorized state user via the Internal Use Only section of a claim form until the claim has been processed for payment. The value entered into this field is used to validate the 60-day claim rules.
Date Accepted	This date is set to the current system date once the claim is successfully submitted for payment. (If errors are detected, the date is not set until the errors are corrected and the claim form is resubmitted.) Claims with a value in the “Date Accepted” field are identified with a status of “Accepted.” Accepted claims can be modified until they are included in a payment batch.
Date Processed	This is the date that the claim was added by the state into the batch payment process. Once the claim has been added to a batch (i.e., “batched”), it cannot be modified. These claims are identified with a status of “Accepted*” until the batch process has completed. Once the batch process is complete, the status of the claim is “Processed.” If a change is required to a claim that has a status of “Accepted*” or “Processed,” a revised claim must be entered into the system.

Appendix E: Claim Statuses

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

Table 5: Claim Statuses

Claim Status	Definition
Not Eligible	An application condition exists that is preventing claiming for the selected month (e.g., sponsor or site is not authorized on the application packet to operate for the selected month).
Incomplete	The claim has been created in the system, but the "Save" button was not selected. The system automatically saves the data that was entered, but the user must return and complete the submission process.
Error	The claim has been submitted and a business rule violation has been identified by the system. The error must be corrected before the claim can be submitted.
Pending	The claim has been saved and edit checks have been performed, but the claim has not been submitted and validated with additional edits (e.g., 60-days edit, etc.).
Validated	The site claim has been entered, saved, and found to contain no errors, thereby being automatically validated by the system. This status will occur only when a sponsor is participating in site-level claiming.
Accepted	The claim has passed all online edit checks and is ready to be included in the payment tracking process. The claim can still be modified while in this status.
Accepted*	The claim has been selected by the state for inclusion in the batch payment process; however, the batch process has not run. The claim cannot be modified in this status; a revision must be submitted if changes are desired.
Processed	The claim has been fully processed by the state and sent to the State's Accounting Office for disbursement of funds.