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## NEXT GEN DOCUMENTATION ~LUNCH~

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## **Table of Contents**

Student Scope	4
Instructional Videos for Lunch Module	6
JMC Lunch Overview	7
Getting Started	7
Installing the Software	7
Defining the Pricing Groups	7
Defining the Items and Prices	
Defining the Low Balance Indicator	7
Setting Up the Student and Staff Accounts	8
Setting Up the Family Accounts	8
Setting Up Users and Passwords for POS Personnel	8
Train the POS Staff on the Use of the POS Application	8
Parent Access to Lunch Account Transactions & Balances	9
Ongoing Maintenance	9
Account Maintenance for Staff, Teachers, and Students	9
Back Up the JMC Data Regularly (District Hosted Only)	9
Modifications During the Current Year	9
Modifications During the Current Teat	9
Documentation for Office Lunch Module	10
Data-Edit Student Lunch Data	10
Data-Edit Family Lunch Data	16
Data-Edit Adult Cash Account	18
Data-Edit Student Cash Account	19
Free/Reduced-Determine Free or Reduced Status	20
Free/Reduced-Eligibility Notification Letter	20
Free/Reduced-Direct Certification Export	25
Free/Reduced-Direct Certification Import	25
Free/Reduced-Direct Certification Notification Letter	23 26
Tree/Reduced-Direct Certification Notification Letter	20
Data Setup-Edit Pricing Groups	29
Data Setup-Edit Meal Prices	29
Data Setup-Edit A La Carte Prices	31
Data Setup-Edit Low Balance Limit	32
Data Setup-Import Account Balances from Prior Year	32
Data Setup-Import Free & Reduced Status from Prior Year	32
Data Setup-Initialize Family Lunch Contacts	33
Departa Magla Servad	34
Reports-Meals Served	
Reports-A La Carte Items Served	35
Reports-A La Carte Items Detail	36
Reports-Lunch Status	37

	38
Reports-Balance Sheet	40
Reports-Low Balance Notices	41
Reports-Summary	43
Reports-Last Payments Detail	44
Reports-Reimbursables	45
Reports-Claims Edit Check	46
Reports-Missing Application Check	47
Reports-Random 3% of Free/Reduced Accounts	48
Reports-Error Prone 3% of Free/Reduced Accounts	48
Reports-Print Barcodes	49
Reports-hawk-I Insurance Requests	50
Integration-PaySchools - Configuration	50
Integration-RevTrak – Export Accounts	51
Integration-RevTrak – Import Deposits	51
Integration-rSchoolToday – Export Accounts	51
Integration-rSchoolToday – Import Deposits	51
Integration-InTouchReceipting – Import Deposits	52
	57 57
POS-Begin Breakfast Button	57
POS-Begin Breakfast Button POS-Begin Lunch Button Documentation for JMC POS Application - Macintosh	57 58 <b>59</b>
POS-Begin Breakfast Button POS-Begin Lunch Button	57 58
POS-Begin Breakfast Button POS-Begin Lunch Button Documentation for JMC POS Application - Macintosh POS-File-Reprocess Transactions POS-Begin Breakfast Button	57 58 <b>59</b> 59 59
POS-Begin Breakfast Button POS-Begin Lunch Button Documentation for JMC POS Application - Macintosh POS-File-Reprocess Transactions	57 58 <b>59</b> 59
POS-Begin Breakfast Button         POS-Begin Lunch Button         Documentation for JMC POS Application - Macintosh         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button	57 58 <b>59</b> 59 59
POS-Begin Breakfast Button         POS-Begin Lunch Button         Documentation for JMC POS Application - Macintosh         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button         POS-Begin Lunch Button	<ul> <li>57</li> <li>58</li> <li><b>59</b></li> <li>59</li> <li>62</li> <li><b>63</b></li> </ul>
POS-Begin Breakfast Button         POS-Begin Lunch Button         Documentation for JMC POS Application - Macintosh         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button         POS-Begin Lunch Button         POS-File-Reprocess Transactions         POS-File-Reprocess Transactions         POS-File-Reprocess Transactions         POS-File-Reprocess Transactions	57 58 <b>59</b> 59 59 62
POS-Begin Breakfast Button         POS-Begin Lunch Button         Documentation for JMC POS Application - Macintosh         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button         POS-Begin Lunch Button	<ul> <li>57</li> <li>58</li> <li><b>59</b></li> <li>59</li> <li>62</li> <li><b>63</b></li> <li>63</li> </ul>
POS-Begin Breakfast Button         POS-Begin Lunch Button         Documentation for JMC POS Application - Macintosh         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button         POS-Begin Lunch Button         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button         POS-File-Reprocess Transactions         POS-File-Reprocess Transactions         POS-File-Reprocess Transactions         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button	57 58 59 59 62 63 63 63
POS-Begin Breakfast Button         POS-Begin Lunch Button         Documentation for JMC POS Application - Macintosh         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button         POS-Begin Lunch Button         POS-Begin I Lunch Button         POS-Begin Breakfast Button         POS-Begin Lunch Button         POS-File-Reprocess Transactions         POS-File-Reprocess Transactions         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button	57 58 59 59 62 63 63 63 63 66 67
POS-Begin Breakfast Button         POS-Begin Lunch Button         Documentation for JMC POS Application - Macintosh         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button         POS-File-Reprocess Transactions         POS-Begin Lunch Button         POS-Begin I Lunch Button         POS-File-Reprocess Transactions         POS-File-Reprocess Transactions         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button	<ul> <li>57</li> <li>58</li> <li>59</li> <li>59</li> <li>62</li> <li>63</li> <li>63</li> <li>63</li> <li>66</li> </ul>
POS-Begin Breakfast Button       POS-Begin Lunch Button <b>Documentation for JMC POS Application - Macintosh</b> POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button         POS-Begin Lunch Button         POS-Begin I Lunch Button         POS-Begin Breakfast Button         POS-Begin Breakfast Button         POS-File-Reprocess Transactions         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button         POS-Begin Lunch Button         Appendices         Appendix A: Using Credit Cards for Lunch Account Deposits         Appendix B: Setting Up Alternative Reimbursable Meals	57 58 59 59 62 63 63 63 63 66 67 67
POS-Begin Breakfast Button         POS-Begin Lunch Button <b>Documentation for JMC POS Application - Macintosh</b> POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button         POS-Begin Lunch Button         POS-Begin I be akfast Button         POS-Begin Breakfast Button         POS-Begin Breakfast Button         POS-File-Reprocess Transactions         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button         POS-Begin Lunch Button         Appendices         Appendix A: Using Credit Cards for Lunch Account Deposits         Appendix B: Setting Up Alternative Reimbursable Meals         Appendix C: Direct Certification Export/Upload	<ul> <li>57</li> <li>58</li> <li>59</li> <li>59</li> <li>62</li> <li>63</li> <li>63</li> <li>63</li> <li>66</li> <li>67</li> <li>67</li> <li>68</li> </ul>
POS-Begin Lunch Button         Documentation for JMC POS Application - Macintosh         POS-File-Reprocess Transactions         POS-Begin Breakfast Button         POS-Begin Lunch Button         Documentation for JMC POS Application - Windows         POS-File-Reprocess Transactions         POS-Begin Breakfast Button	57 58 59 59 62 63 63 63 63 66 67 67

#### **Student Scope**

The Student Scope is a link found in the Quick Links on many of the main pages in JMC's Next Gen Office Application.

The Student Scope allows you to simultaneously view 6 different types of data for a student from the JMC Next Gen database. Each individual user may specify which 6 types of data they wish to view in the Student Scope.

The following is a list of the types of data that may be viewed within the Student Scope, depending upon what access is assigned to your user account in JMC:

- Attendance
- Schedules
- Student Lunch Transactions
- Period Attendance
- Discipline
- Health Immunizations
- Report Cards
- Student Contacts
- Student Progress Report
- Student Transcript

An example of how to get to the Student Scope is shown here is <u>Schedules – Student –</u> <u>Edit Schedules</u>.

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Notice the Student Scope link on the right of the page under Quick Links. If you click on the Student Scope link you will get a page that pops up similar to the next figure.

A Quick Link to Student Scope may also be found on <u>Edit – Student Data</u> and <u>Grading –</u> <u>Entry – Edit Grades</u>.

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Date     Exemption     Administered at School       DTaP     10/1/2001 -       Diptheria, Tetanus, and Pertussis     (OY 2M)       Full     Diptheria, Tetanus, and Pertussis       OTAP     12/3/2001 -       Diptheria, Tetanus, and Pertussis     (OY 4M)       Full     Diptheria, Tetanus, and Pertussis       OTAP     10/28/2002 -       Diptheria, Tetanus, and Pertussis     (OY 4M)       Full     Diptheria, Tetanus, and Pertussis       DTAP     10/28/2002 -       Diptheria, Tetanus, and Pertussis     (1Y 3M)       Full     Diptheria, Tetanus, and Pertussis       Of AM     Full				0	
mmunization     (Age)     Dosage     at School       DTaP     10/1/2001 -       Diptheria, Tetanus, and Pertussis     (0Y 2M)       Full       DTaP     12/3/2001 -       Diptheria, Tetanus, and Pertussis     (0Y 4M)       Full       DTaP     2/4/2002 -       Diptheria, Tetanus, and Pertussis     (0Y 6M)       Full       DTaP     10/28/2002 -       Diptheria, Tetanus, and Pertussis     (1Y 3M)       Full					-
mmunization     (Age)     Dosage     at School       DTaP     10/1/2001 -     -       Diptheria, Tetanus, and Pertussis     (0Y 2M)     Full       DTaP     12/3/2001 -     -       Diptheria, Tetanus, and Pertussis     (0Y 4M)     Full       DTaP     2/4/2002 -     -       Diptheria, Tetanus, and Pertussis     (0Y 6M)     Full       DTaP     10/28/2002 -     -       Diptheria, Tetanus, and Pertussis     (1Y 3M)     Full       DTaP     10/28/2002 -     -       Diptheria, Tetanus, and Pertussis     (1Y 3M)     Full       DTaP     9/19/2005 -     -       Diptheria, Tetanus, and Pertussis     (4Y 1M)     Full	Health Immunizations		6 Overslept		-
Diptheria, Tetanus, and Pertussis       (0Y 2M)       Full         DTaP       12/3/2001 -       Diptheria, Tetanus, and Pertussis       (0Y 4M)         DTaP       2/4/2002 -       Diptheria, Tetanus, and Pertussis       (0Y 6M)         Diptheria, Tetanus, and Pertussis       (0Y 6M)       Full         DTaP       10/28/2002 -       Diptheria, Tetanus, and Pertussis       (1Y 3M)         DTaP       10/28/2002 -       Diptheria, Tetanus, and Pertussis       (1Y 3M)         DTaP       9/19/2005 -       Diptheria, Tetanus, and Pertussis       (4Y 1M)	Date		6 Overslept  Discipline		
Diptheria, Tetanus, and Pertussis       (0Y 4M)       Full         DTaP       2/4/2002 -         Diptheria, Tetanus, and Pertussis       (0Y 6M)       Full         DTaP       10/28/2002 -         Diptheria, Tetanus, and Pertussis       (1Y 3M)       Full         DTaP       9/19/2005 -         Diptheria, Tetanus, and Pertussis       (4Y 1M)       Full	Date (mmunization (Age)	Dosage at School	6 Overslept  Discipline		<b>T</b>
DTaP     2/4/2002 - (0Y 6M)       Diptheria, Tetanus, and Pertussis     10/28/2002 - (0Y 6M)       Diptheria, Tetanus, and Pertussis     11Y 3M)       Full     9/19/2005 - Diptheria, Tetanus, and Pertussis       Optimeria, Tetanus, and Pertussis     (4Y 1M)	Date Date Immunization (Age) DTaP 10/1/20(	Dosage at School D1 -	6 Overslept  Discipline		
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Iptheria, Tetanus, and Pertussis         (17 3P)         Full           Diptheria, Tetanus, and Pertussis         9/19/2005 -	Immunization     Date (Age)       DTaP     10/1/200       Diptheria, Tetanus, and Pertussis     (0Y 2M)       DTaP     12/3/200       Diptheria, Tetanus, and Pertussis     (0Y 4M)       DTaP     2/4/200	Dosage         at School           01 -         -           Full         -           01 -         -           02 -         -	6 Overslept  Discipline		
biptheria, Tetanus, and Pertussis (4Y 1M) Full	Immunization     Date (Age)       DTaP     10/1/20( (0Y 2M)       Diptheria, Tetanus, and Pertussis     (0Y 2M)       Diptheria, Tetanus, and Pertussis     (0Y 4M)       DTaP     2/4/200       Diptheria, Tetanus, and Pertussis     (0Y 6M)	Dosage         at School           01 -         -           01 -         -           Full         -           Full         -           Full         -           For the scheme	6 Overslept  Discipline		
PV 10/1/2001 -	Date         Date           Immunization         (Age)           DTaP         10/1/200           Diptheria, Tetanus, and Pertussis         (0Y 2M)           DTaP         12/3/200           Diptheria, Tetanus, and Pertussis         (0Y 4M)           DTaP         2/4/200           Diptheria, Tetanus, and Pertussis         (0Y 6M)           DTaP         2/4/200           Diptheria, Tetanus, and Pertussis         (10/26/20           Diptheria, Tetanus, and Pertussis         (17 3M)	Dosage         at School           D1 -         -           0 Full         -           D1 -         -           D1 -         -           01 -         -           01 -         -           01 -         -           02 -         -           02 -         -           0 Full         -	6 Overslept  Discipline		

To change the type of data viewed in any of the 6 panels in the Student Scope, simply click on the menu in the upper left corner of that panel and select a different data type.

#### **Instructional Videos for Lunch Module**

This is a short introduction to the Lunch module for users new to the program. <u>https://www.youtube.com/watch?v=jhLQxnSCmVk&index=1&list=PL8v9ofhuRRabcvs</u> <u>XvqIjSyJdHk3cTNNAg</u>

This instructional video will show you how to set up the Lunch module. <u>https://www.youtube.com/watch?v=iY0TNKEk5AA&list=PL8v9ofhuRRabcvsXvqIjSyJ</u> <u>dHk3cTNNAg&index=2</u>

This instructional video will introduce you to the POS (Point of Sale) software. https://www.youtube.com/watch?v=FR6Cephdx9Y&index=3&list=PL8v9ofhuRRabcvs XvqIjSyJdHk3cTNNAg

This instructional video will introduce you to reports in the Lunch module. <u>https://www.youtube.com/watch?v=JwYSr-</u> F8ngw&index=4&list=PL8v9ofhuRRabcvsXvqIjSyJdHk3cTNNAg

This instructional video will introduce you to the new web-based POS (Point of Sale) software. https://www.youtube.com/watch?v=a-Zc1r49RV8

<u>nups.//www.youtube.com/watch:v=a-2.c114)K</u>

# **JMC Lunch Overview**

The Lunch module of JMC Next Gen Office Application gives your district the ability to keep track of lunch and breakfast purchases and accounts and also works in conjunction with the JMC Point Of Sale (POS) Application to allow real-time transactions to be posted to accounts.

The **basic tasks and reports** for the lunch software options are:

- -setting up accounts, prices, and a la carte items in the office
- -performing Point Of Sale (POS) transactions
- -printing reports and maintaining accounts in the office

# **Getting Started**

## **Installing the Software**

Make sure the most current build of the JMC Next Gen Office Application has been installed on your web server. Also, make sure that all persons who will be handling lunch account transactions and reports have been assigned the appropriate access privileges to the Lunch module in Next Gen. To establish or modify access for a user, select <u>File-User Privilege</u>. For the lunch room computer(s), the JMC POS Application can still be installed and have access to the JMC Next Gen database; HOWEVER a new web-based POS is now available as of fall 2017. If the lunch module is not available in your JMC Next Office Application or you do not have the JMC POS Application, please contact JMC.

## **Defining the Pricing Groups**

The pricing groups need to be established for the various grade ranges. This is especially important if the meal or a la carte item prices are to be different for some buildings or grade levels.

## **Defining the Items and Prices**

Defining the prices and a la carte items must be done before any transactions can be processed. Costs for meals must be entered, including any contributions from the state or federal governments for each meal or meal item sold. Also, a la carte items must be named and priced. If more than one pricing group has been established, then these prices must be entered for each pricing group.

## **Defining the Low Balance Indicator**

The low balance indicator is set in the office and will affect the transactions at the Point of Sale. During POS transactions, if a student's account balance falls below the Low Balance Indicator amount a warning will appear on the POS computer screen.

## **Setting Up Student and Staff Lunch Accounts**

The accounts for students and staff will need to be established. Most students will already be in the JMC data for the current year; however, new students will need to be added to the database before they can use their lunch accounts. Also, students' lunch status (free, reduced, or regular) must be set on the Lunch-Data-Edit Student Lunch Data screen.

Teachers and other school staff members that choose to purchase lunches using an account will need to be assigned a student number in the JMC Office Application. Select <u>Edit-Student Data</u> or <u>Edit-New Student Wizard</u> to add new accounts.

### **Setting Up Family Accounts**

The accounts for families will need to be established if lunch transactions for a family are to be drawn from one central account. To set up family lunch accounts, the lunch contacts may be set individually on the <u>Edit-Student Data</u> screen or en masse using the <u>Lunch-Data-Initialize Family Lunch Contacts</u> option. The <u>Lunch-Data-Initialize Family Lunch Contact</u>, based upon primary contacts, for all students who do not yet have a lunch contact.

Deposits can then be made into the lunch contacts' lunch accounts on the <u>Lunch-Data-Edit Student Lunch</u> or <u>Lunch-Data-Edit Family Lunch</u> screens.

Deposits would normally be put into the family lunch account rather than the student's lunch account. However, if you deposit to the student account it will still go to the family account.

## Setting Up Users and Passwords for POS

The user accounts for POS personnel must be set up in advance. To establish or modify access for a user, select <u>File-User Privileges</u> from the JMC Office Application. Each time the POS Application is started up the user will be asked to log in with their user name and password. All transactions from the POS computer will be denoted as having been performed by the user who was logged in at the time of the transaction.

Office staff may need to be granted specific user privileges in order to view or edit lunch data, such as record deposits, change student lunch status, or generate lunch reports. The two user privileges that govern the ability to view and edit lunch data are Lunch and Sensitive.

## Train the POS Staff on the Use of the POS Application

Although the JMC POS Application is designed to be quick and simple to use, some familiarity with the computer keyboards and/or keypads and required keystrokes would be very helpful before attempting to process transactions during a busy school meal session. POS staff will need to know the procedures for working with students (getting their JMC student number, dealing with low balances and charges, etc.).

## Parent Access to Lunch Account Transactions and Balances

Schools that have purchased the Online Parent feature of the JMC Office software will have the ability to post lunch transactions and account balances online for parents to access. Parents will need to be designated as the Lunch contact for all pertinent students and will need to have a login password assigned in the JMC Office Application. The parents' passwords may be assigned under <u>Attendance-Contacts-Edit Contacts</u>.

## **Ongoing Maintenance**

In addition to getting the accounts, prices, computers, and procedures established for the new school year, other phases of working with lunch transactions will need to be addressed as the school year progresses.

## Account Maintenance for Staff, Teachers, and Students

Adding and modifying accounts, passwords, student lunch status (free and reduced lunches), and entering deposits will be necessary at various times throughout the year. Mailings may be periodically generated to inform parents of low balances in student and family accounts.

## Back Up the JMC Data Regularly (District Hosted Only)

Although it has always been important to make regular backups for maintaining accurate data for the JMC suite of software, having good backups becomes more important than ever now that your school will be tracking deposits, refunds, and purchases. It is advised that your school establish a regular backup procedure.

## **Modifications During the Current Year**

A la carte items should not be moved within the A La Carte Prices table once purchases have been made using this table. New a la carte items should be added to the end of the list. Price changes may be made at any time during the year; however, price changes do not affect past transactions. Student lunch statuses may also change during the year.

# Documentation for Office Lunch Module

#### Lunch—Data—Edit Student Lunch Data

This selection is used to maintain account information for student lunch accounts. Deposits, refunds, status changes, and some reports may be accomplished from this screen. If the student has a lunch contact assigned to them, then the lunch contact's name and account balance will also be displayed.

*Note:* Since JMC student numbers are needed for JMC lunch account transactions, adults must be entered as a student in the database in order for them to have a lunch account. Students may be added by using <u>Edit-New Student Wizard</u> or <u>Edit-Student</u> <u>Data</u>. For adults, use Grade "Adult".

1. Select <u>Lunch—Data—Edit Student Lunch Data</u>. For students with family accounts, the page will appear similar to Figure 1A. For students with only a student account, the page will appear similar to Figure 1B.

ade: All	District	Find:			- 02/24/2017 - Friday			2016-20	51/
9: 3456 mch Cont byle, Eric 3 Today S nes, IA 56 5-249-773 mrent Fa mch Stat Allow C ransactior	565 35 - Cell 1 mily Bala sus: Reduc harges	ed Purchases	]		Grade: 11 Birth Date (Age): 4/10/1996		Transaction	ns) (Print Not	tice
									_
	Deleted	Date	User	Transaction		Status	Amount		
Delete	Deleted			Reduced Lunch		Status R	Amount \$ -0.85		1
Delete Delete		01/18/2017	JMCADMIN					Print Receipt	
	0	01/18/2017 01/18/2017	JMCADMIN	Reduced Lunch Deposit - Cash			\$ -0.85	Print Receipt	
Delete		01/18/2017 01/18/2017 01/18/2017	JMCADMIN JMCADMIN	Reduced Lunch Deposit - Cash Bread Item			\$ -0.85 \$ 0.25	Print Receipt	
Delete Delete		01/18/2017 01/18/2017 01/18/2017 12/14/2016	JMCADMIN JMCADMIN JMCADMIN JMCADMIN	Reduced Lunch Deposit - Cash Bread Item			\$ -0.85 \$ 0.25 \$ -0.25	Print Receipt	
Delete Delete Delete		01/18/2017 01/18/2017 01/18/2017 12/14/2016 12/14/2016	JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN	Reduced Lunch Deposit - Cash Bread Item Desserts		R	\$ -0.85 \$ 0.25 \$ -0.25 \$ -0.35	Print Receipt Print Receipt	
Delete Delete Delete Delete		01/18/2017 01/18/2017 01/18/2017 12/14/2016 12/14/2016 11/16/2016	JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN	Reduced Lunch Deposit - Cash Bread Item Desserts Reduced Lunch Deposit - Check # 11112		R	\$ -0.85 \$ 0.25 \$ -0.25 \$ -0.35 \$ -0.85		
Delete Delete Delete Delete Delete		01/18/2017 01/18/2017 01/18/2017 12/14/2016 12/14/2016 11/16/2016 11/03/2016	JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN	Reduced Lunch Deposit - Cash Bread Item Desserts Reduced Lunch Deposit - Check # 11112		R	\$ -0.85 \$ 0.25 \$ -0.25 \$ -0.35 \$ -0.85 \$ 10.00		
Delete Delete Delete Delete Delete Undelete		01/18/2017 01/18/2017 01/18/2017 12/14/2016 12/14/2016 11/16/2016 11/03/2016 11/03/2016	JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN	Reduced Lunch Deposit - Cash Bread Item Desserts Reduced Lunch Deposit - Check # 11112 Potato Item Student Second Lunch		R	\$ -0.85 \$ 0.25 \$ -0.25 \$ -0.35 \$ -0.85 \$ 10.00 \$ -0.25		
Delete Delete Delete Delete Undelete Undelete		01/18/2017 01/18/2017 01/18/2017 12/14/2016 12/14/2016 11/16/2016 11/03/2016 11/03/2016 11/03/2016	JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN	Reduced Lunch Deposit - Cash Bread Item Desserts Reduced Lunch Deposit - Check # 11112 Potato Item Student Second Lunch		R	\$ -0.85 \$ 0.25 \$ -0.25 \$ -0.35 \$ -0.85 \$ 10.00 \$ -0.25 \$ -1.65		
Delete Delete Delete Delete Delete Undelete Undelete		01/18/2017 01/18/2017 01/18/2017 12/14/2016 12/14/2016 11/16/2016 11/03/2016 11/03/2016 11/03/2016 11/03/2016	JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN	Reduced Lunch Deposit - Cash Bread Item Desserts Reduced Lunch Deposit - Check # 11112 Potato Item Student Second Lunch Bread Item Reduced Lunch		R	\$ -0.85 \$ 0.25 \$ -0.25 \$ -0.35 \$ -0.85 \$ 10.00 \$ -0.25 \$ -1.65 \$ -0.25		

Figure 1A: Edit Student Lunch Data page for student with a Family Account.

c Demo	District			Day: 156 - 02/24	4/2017 - Friday		2016-2017
ade: A	•	Find:		• <->			
udent N 68	lame: Chris	stine Andersor	ı		Grade: 10 Birth Date (Age)	N/A	
			1		Current Balance:	\$ -4.65	
		Student 🔹					
Allow	Charges						
ansactio	ns Allow	ed Purchases					
			_				Dist Nation
Depos	it Ref	fund 📔 Ne	w			Print Tr	ransactions   Print Notice
Depos	it Ref	fund Ne	w			Print Tr	ransactions Print Notice
Depos	it Ref		User	Transaction	Stat	Print Tr	
Depos Delete		Date			Stat		Balance
	Deleted	Date 12/14/2016	User JMCADMIN		Stat	ıs Amount	Balance \$ -4.65
Delete	Deleted	Date 12/14/2016 12/14/2016	User JMCADMIN JMCADMIN	Potato Item		<b>15 Amount</b> \$ -0.25	Balance \$ -4.65 \$ -4.40
Delete Delete	Deleted	Date 12/14/2016 12/14/2016 12/14/2016	User JMCADMIN JMCADMIN JMCADMIN	Potato Item Student Lunch Extra Milk	P	<b>5 Amount</b> \$ -0.25 \$ -0.25	Balance \$ -4.65 \$ -4.40 \$ -4.15
Delete Delete Delete	Deleted	Date 12/14/2016 12/14/2016 12/14/2016 11/03/2016	User JMCADMIN JMCADMIN JMCADMIN JMCADMIN	Potato Item Student Lunch Extra Milk Student Lunch	P	s Amount \$ -0.25 \$ -0.25 \$ -1.70	Balance \$ -4.65 \$ -4.40 \$ -4.15 \$ -2.45
Delete Delete Delete Delete	Deleted	Date 12/14/2016 12/14/2016 12/14/2016 11/03/2016 11/03/2016	User JMCADMIN JMCADMIN JMCADMIN JMCADMIN	Potato Item Student Lunch Extra Milk Student Lunch Student Lunch Extra Milk Student Lunch	P P P	Amount \$ -0.25 \$ -0.25 \$ -0.25 \$ -1.70 \$ -0.25	Balance \$ -4.65 \$ -4.40 \$ -4.15 \$ -2.45 \$ -2.20
Delete Delete Delete Delete Delete	Deleted	Date 12/14/2016 12/14/2016 12/14/2016 11/03/2016 11/03/2016 10/27/2016	User JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN JMCADMIN	Potato Item Student Lunch Extra Milk Student Lunch Student Lunch Extra Milk Student Lunch	P P P	Amount \$ -0.25 \$ -0.25 \$ -1.70 \$ -0.25 \$ -1.70 \$ -0.25 \$ -1.70	Balance           \$ -4.65           \$ -4.40           \$ -4.15           \$ -2.45           \$ -2.20           \$ -0.50

Figure 1B: Edit Student Lunch Data page for student with only a Student Account.

2. Select the student to be edited in the Find box at the top of the page.

**Lunch Status** To modify the lunch status of a student, select an option from the **Lunch Status** menu. You will then be prompted to enter the effective date for this status change. Depending upon the date entered and the transactions posted for the student, the amount a student was charged for a prior lunch purchase may be altered during this process. This could also affect their lunch account balance.

Available lunch status options are:

- Paying Student
- Free Student
- Reduced Student

*Note:* Users of the JMC Next Gen must be granted access to Sensitive data in order to see or edit the lunch status for a student. To check your user privileges, select <u>File-Who Am I</u>. Contact your JMC Administrator for modifications to your user privileges.

*Note:* Adults must be entered as a student in the database in order for them to have a lunch account. Students or adults may be added by using <u>Edit-Student</u> <u>Data</u> or <u>Edit – New Student Wizard</u>. Specify a grade level of "Adult" and also specify the pricing group to the adult.

**Economic Indicator** (*Minnesota Only*) To modify the economic indicator of a student, select an option from the **Economic Indicator** menu.

**Economically Disadvantaged** (*Wisconsin Only*) To modify the economically disadvantaged status of a student, check the Economically Disadvantaged check box as appropriate.

**Current Family Balance** This item is not editable. To affect a change to the current balance of the family account, use the **Deposit** and **Refund** buttons on this page or on <u>Lunch – Data – Edit Family Lunch Data</u>.

**Current Balance** This item is not editable. To affect a change to the current balance of the account, use the **Deposit** and **Refund** buttons.

Allow Charges To change the charge status for a student, click on the Allow Charges checkbox.

**Deposit** To enter a deposit in the office for a lunch account, click **Deposit**, select Family Account or Student Account (default is Family if student has a lunch contact assigned, otherwise this option is not displayed), enter the date (default is today's date), specify amount of the deposit, select cash or check (default is check), and then click **OK** to complete the transaction. Figure 2 shows how the screen will appear once the **Deposit** button has been clicked.

Deposit			×
Family Account	<ul><li>Cash</li><li>Check</li></ul>	Check Number:	<b>^</b>
Deposit Date: 5/26/2014	Deposit A	nount:	
	ОК	Close	-

Figure 2: Deposit Dialog for Edit Student Lunch Data screen.

*Note*: If a student has an account balance in their student lunch account and their lunch contact also has a balance in the family lunch account, funds will be taken from the student account first to cover transactions. Once the student account is reduced to a zero balance, the student's POS meal transactions will cause a transfer of funds from the family account to cover the cost of their purchase.

**Refund** To issue a refund in the office (e.g. for reconciling any overages from student lunch transactions at the Point of Sales) click **Refund**. A screen will appear similar to Figure 2. Enter the date (default is today's date), amount of the refund, select cash or check (default is check), and click **OK** to complete the transaction.

**New** To create a new lunch status record, click **New**. A screen will appear similar to Figure 3.

Next the user must specify the type of action, typically by selecting an option such as

- Determination Made Approved for Free (because of an application for benefits)
- Determination Made Approved for Reduced (because of an application for benefits)
- Direct Certification Approved for Free (because of direct certification download).

If one of those 3 types is selected, the user will then want to select the student's new lunch status from the **Lunch Status** drop down list as shown in Figure 4. The user will then be prompted to enter the **Determination Date** (effective date) for the student's lunch status change – see Figure 5.

Date: 9/1/2017 Type: Applicatio Lunch Status:	n Received Paying Student		¥		
SNAP HeadStart	SNAP Letter EarlyHdStart	TANF Migrant Or Household Si	FDPIR Runaway ze	Other Homeless	ErrorProne
Contact:	Comment	:		CaseNumber	:
		ОК	Close		

Figure 3: Making a new lunch status record for a student account.

Date:	9/1/2017	_		
	Application Received			
Lunch	Application Received Application was Included in Verification Determination Made - Approved for Free			
sN	Determination Made - Approved for Free Last Year Determination Made - Approved for Reduced	DPIR	Other	ErrorProne
_	Determination Made - Approved for Reduced Last Year Determination Made - Denied - Other Determination Made - Denied Due to Earnings	unaway	Homeless	FosterChild
	Direct Certification - Approved for Free Direct Certification - Approved for Reduced Eligibility Letter Generated		CaseNumber:	
	Eligibility Letter Sent	se		

Figure 4: Record types for lunch status records.

Date: 9/1/2017								
Type: Determination Made - Approved for Reduced								
Lunch Status:	Reduced Student 🔻							
Determination [	Date: 9/1/2017							
SNAP	SNAP Letter			Other	ErrorProne			
HeadStart	EarlyHdStart	🗌 Migrant	Runaway	Homeless	FosterChild			
Approved Ba	sed On Income And O	r Household Si	ze					
Contact: Comment: CaseNumber:								
		ОК	Close					

Figure 5: Affecting a Lunch Status Change While Adding Related Lunch Status Records

Once the **Type** and **Lunch Status (if needed)** are specified, *the details must be included as well*. If this step is not done then the Lunch Status and Benefit Issuance List reports will not have the information necessary to list this student correctly.

For types **Determination Made – Approved for Free** and **Determination Made – Approved for Reduced**, the reason is almost always going to be **Approved Based On Income And Or Household Size**. These lunch status changes are probably being made because the user has a copy of an application from the parent or guardian, and the reason for their approval is typically because of income and/or household size. Assuming this to be the case, the user would simply click the check box for that option.

For type **Direct Certification** – **Approved for Free**, the reason is typically one of the following, as found in the Direct Certification file the user downloaded from their state department's website:

- SNAP (for Iowa this is also known as FA or Food Assistance)
- TANF (for Iowa this is also known as FIP)
- FDPIR
- Other
- HeadStart
- EarlyHeadStart
- Migrant
- Runaway
- Homeless
- FosterChild
- CaseNumber

*In some cases, the student may have qualified for benefits based on more than one reason*, so the user must carefully check all of the details in the Direct Certification download file to make sure all details are included correctly.

For type **Direct Certification – Approved for Reduced**, which is new in JMC this year, the reason is typically **Other**.

Notice that manually entering these changes requires the user to enter the details, whereas using processes such as Direct Certification Import will take care of these automatically.

The following types of records do not allow for a status change to free or reduced but allow the user to include more details about important steps in the lunch benefit data trail.

- Application Received
- Application was Included in Verification
- Determination Made Denied Other
- Determination Made Denied Due to Earnings
- Eligibility Letter Generated
- Eligibility Letter Sent

**Delete** To delete a transaction, click on the **Delete** link on the left side of the record in the transaction list.

*Note:* A deleted transaction will still display on this page but will be italicized and will no longer affect the student's lunch balance or family lunch account balance.

**Print Transactions** To print a list of all transactions listed on this screen, click **Print Transactions**.

**Print Notice** To print a notice for the family lunch account listed on this screen, click **Print Notice**. You will then be prompted to enter/edit the message that will be included in the notice. The resulting notice will contain this message along with the family's and student's current lunch balances. Also, all students having the same lunch contact will be listed along with their student lunch account balances.

**Allowed Purchases** To edit the items that a student is allowed to purchase for a student, click the **Allowed Purchases** tab at the bottom of the page. The page will appear similar to Figure 6.

Transactions Allowed Purchases	
Allowed Items	
✓ Breakfast	Figure 6:
✓ Lunch	e
🕑 Breakfast Extra Milk	E 1141
	Editing a
✓ ∓ Breakfast A La Cartes	Student's
✓ ∓ Lunch A La Cartes	Allowed
	Purchases
POS Display Message:	
peanut allergies	
Save	

To display the items within an A La Cartes category, such as Lunch A La Cartes, click on the plus symbol near the checkbox for that category. The page will appear similar to Figure 7.

Transactions Allowed Purchases			
	Allowed Items		
	🔲 🖻 Breakfast A La Cartes	<b>A</b>	Eiran 7.
	Student 2nd Bkfst		Figure 7:
	✓ Oatmeal		
	PowerAde / Juice		Displaying
	🕑 Botlte Water		Items from
	Cookie / Bar		
	Chips		an
	Pop Tart		A La Cartes
	Sandwich / Entree		Category
	Ice-Cream	-	
	POS Display Message:		
	peanut allergies		
	Save		J

Any item in a category may be checked or unchecked, thus controlling the purchases that a student may make at the Point of Sale. In the example displayed in Figure 6, the student will not be allowed to purchase breakfast A La Cartes items "Cookie/Bar", "Chips", "Pop Tart", or "Ice Cream".

**POS Display Message** An editable Point of Sale message for a student can be found on the **Allowed Purchases** tab as shown in Figures 5 & 6. You may enter a short message that will display at the Point of Sale when the student is making a purchase.

#### Lunch—Data—Edit Family Lunch Data

This selection is used to maintain account information for family lunch accounts. Deposits, refunds, status change records, and some reports may be accomplished from this screen. Students who have this contact designated as their lunch contact will be displayed at the top of the screen. 1. Select <u>Lunch—Data—Edit Family Lunch Data</u>. The page will appear similar to Figure 8.

JMC Dem	o Distric	t		Day: 156 - 02/24/	2017 - Friday				2016-201
Find:			•	< ->					
Eric Doyl 123 Toda PO Box 1 Jones, I <i>l</i>	iy St. 999		Ander Aaset	nts with this Lunch Contact: son, James h, John , Caley	Current Balance: \$	; -17.80			
Deposi	t Re Deleted	fund	lew	Transaction	Student	_	Transact	tions	int Notice
Delete	Deleted			Reduced Lunch	John Aaseth	\$ -0.85			-
Delete				Student Account Deposit - Cash	John Aaseth			Print Recei	pt
Delete		01/18/2017	JMCADMIN	Bread Item	John Aaseth	\$ -0.25	\$ -17.20		
Delete		12/19/2016	JMCADMIN	Refund - Check # P6578		\$ -124.65	\$ -16.95		
Delete		12/14/2016	JMCADMIN	Desserts	John Aaseth	\$ -0.35	\$ 107.70		
Delete		12/14/2016	JMCADMIN	Reduced Lunch	John Aaseth	\$ -0.85	\$ 108.05		
Delete		11/16/2016	JMCADMIN	Student Account Deposit - Check # 11112	John Aaseth	\$ 10.00	\$ 108.90	Print Recei	pt
Undelete	4	11/03/2016	JMCADMIN	Student Lunch Extra Milk	James Anderson	\$ -0.25			
	1	11/02/2016		Student Lunch	James Anderson	÷ + 50			

Figure 8: Edit Family Lunch Data screen.

**Current Balance** This item is not editable. To affect a change to the current balance of the account, use the **Deposit** and **Refund** buttons.

**Deposit** To enter a deposit in the office for a family lunch account, click **Deposit**, select the family account, enter the date (default is today's date), specify amount of the deposit, select cash or check (default is check), and then click **OK** to complete the transaction. A dialog similar to Figure 9 will appear once the **Deposit** button has been clicked.

Check Number:	
Deposit Amount:	
OK Close	
	Deposit Amount:

Figure 9: Deposit Dialog for Edit Family Lunch Data screen.

**Refund** To issue a refund in the office click **Refund**. A dialog similar to Figure 9 will appear. Then enter the date (default is today's date), amount of the refund, select cash or check (default is check), and click **OK** to complete the transaction.

**New** To create a new lunch status record, click **New**. A dialog will appear similar to Figure 10A. Then enter the data (date and record type – see Figure 10B), and click **OK** to create the record.

	Date:	9/7/2017	
	Type:	Application Received	
		Application Received	
		Application was Included in Verification	
		Determination Made - Approved for Free	
		Determination Made - Approved for Free Last Year	Ĩ
		Determination Made - Approved for Reduced	
		Determination Made - Approved for Reduced Last Year	
		Determination Made - Denied - Other	
		Determination Made - Denied Due to Earnings	
Date: 9/7/2017		Direct Certification - Approved for Free	
Type: Application Received		Direct Certification - Approved for Reduced	
		Eligibility Letter Generated	
		Eligibility Letter Sent	
OK Close		Hawki Insurance Declined	

Figures 10A & 10B: Making a new lunch status record for a family account.

**Delete** To delete a transaction, click on the **Delete** link on the left side of the record in the transaction list.

*Note:* A deleted transaction will still display on this page but will be italicized and will no longer affect the student's lunch balance or family lunch account balance.

*Note:* Transfers may only be deleted from <u>Lunch-Data-Edit Student Lunch Data</u>. This safeguard is used to ensure that transfers are only deleted in pairs.

**Print Transactions** To print a list of all transactions listed on this screen, click **Print Transactions**.

**Print Notice** To print a notice for the family lunch account listed on this screen, click **Print Notice**. You will then be prompted to enter/edit the message that will be included in the notice. The resulting notice will contain this message along with the family's current lunch balance. Also, all students having this contact as their lunch contact will be listed along with their student lunch account balances.

#### Lunch—Data—Edit Adult Cash Account

This selection is used to maintain account information for adult cash (guest) lunch transactions. Guests would be anyone not having a JMC lunch account. The adult and student cash account screens are used to keep adult and student cash account transactions separate since they generally involve different prices for meals. Deposits, refunds, and a basic report may be accomplished from this screen.

1. Select <u>Lunch—Data—Edit Adult Cash Account</u>. The page will appear similar to Figure 11.

Building:	040 -	High S	chool 🔻			
Name: Ca Current B	sh Adult <b>alance:</b> \$ (	0.00				
Print						
Delete		03/10/2014	Angie		Adult Lunch	\$ -3.45
Delete		03/03/2014	Angie	Deposit - Cash		\$ 1.00
Delete		03/03/2014	Angie		Cookie / Bar	\$ -1.00
Delete		03/03/2014	Angie	Deposit - Cash		\$ 6.00
Delete		03/03/2014	Angie		Sandwich / Entree	\$ -2.00
Delete		03/03/2014	Angie		Sandwich / Entree	\$ -2.00
Delete		03/03/2014	Angie		Sandwich / Entree	\$ -2.00
Delete		03/03/2014	Angie	Deposit - Cash		\$ 3.00
Delete		03/03/2014	Angie		Pop Tart	\$ -1.00
Delete		03/03/2014	Angie		Cookie / Bar	\$ -1.00
Delete		03/03/2014	Angie		Cookie / Bar	\$ -1.00
Delete		02/28/2014	Angie	Deposit - Cash		\$ 2.00
Delete		02/28/2014	Angie		Sandwich / Entree	\$ -2.00
Delete		02/26/2014	Anne	Deposit - Cash		\$ 3.75
Delete		02/26/2014	Anne		Miscellaneous	\$ -3.75
Delete		02/26/2014	Angie	Deposit - Cash		\$ 1.00
Delete		02/26/2014	Angie		Cookie / Bar	\$ -1.00
Delete		02/25/2014	Angie	Deposit - Cash		\$ 2.50
Delete		02/25/2014	Angie		Veggie / Fruit	\$ -0.50
Delete		02/25/2014	Angie		Sandwich / Entree	\$ -2.00
Delete		02/24/2014	Mary	Deposit - Cash		\$ 3.45
Delete		02/24/2014	Mary		Adult Lunch	\$ -3.45
Delete		02/18/2014	Angie	Deposit - Cash		\$ 1.00
Delete		02/18/2014	Angie		Chips	\$ -1.00
Delete		02/18/2014	Angie	Deposit - Cash		\$ 3.45
Delete		02/18/2014	Angie		Adult Lunch	\$ -3.45

Figure 11:

Edit Adult Cash Account screen.

Building To choose a different building select it from the Building menu.

**Delete** To delete a transaction, click on the **Delete** link on the left side of the record in the transaction list.

*Note:* A deleted transaction will still display on this page but will be italicized and will no longer affect the cash account balance.

#### Lunch—Data—Edit Student Cash Account

This selection is used to maintain account information for student cash (guest) lunch transactions. Guests would be anyone not having a JMC lunch account. The student and adult cash account screens are used to keep student and adult cash account transactions separate since they generally involve different prices for meals. Deposits, refunds, and a basic report may be accomplished from this screen.

1. Select <u>Lunch—Data—Edit Student Cash Account</u>. The page will appear essentially the same as Figure 11: Edit Adult Cash Accounts

**Building** To choose a different building select it from the **Building** menu.

**Delete** To delete a transaction, click on the **Delete** link on the left side of the record in the transaction list.

*Note:* A deleted transaction will still display on this page but will be italicized and will no longer affect the cash account balance.

#### Lunch—Free/Reduced—Determine Free or Reduced Status

This selection is used to determine eligibility for free and reduced lunch programs based on federal guidelines. The user will enter the household size and income for one or two earners and then the eligibility result will be displayed. The result status may be applied to the dependents of the contact specified for this determination.

JMC Office Application users must be granted "Make Changes" access to Sensitive data in order to use this menu option. To check your user privileges, select <u>File-Who Am I</u>. Contact your JMC Administrator for modifications to your user privileges.

1. Select <u>Lunch—Free/Reduced—Determine Free or Reduced Status</u>. The page will appear similar to Figure 12.

Household Size:	4				
Income:	Weekly	Every 2 Weeks	Twice a Month	Monthly	Yearly
Earner 1:					25000
Earner 2:					
	Household Inco	<b>ne:</b> \$25,000.00 per Y	'ear		
Calculate					
Eligible For: Free Mea Find: Last Name Contact List:	s	tudent List: (Selecte			
Aasimov, Isaac & Nan		ffected) Adams, Jim	A 1	Andrew & Amy Adan	nc
Abrahams, Arnold & K	atie			23 Fourth St	115
Abrahams, Jacob & Sa Adams, Andrew & Amy			9	unnyville, MN 5555	5
Alderson, Jessica	ý				-
Alexander, Ashley			9	tatus Effective Dat	e: 8/26/2014
Allen, Claire Allison, Robby & Bobbi					
Anderson, Abbie	I		ſ	etermination Made	Date: 8/26/2014
Anderson, Denny & Je				Make Dependent	s 'Free'
Print Letter			[	leset	

Figure 12: Determination of Free or Reduced Status for school lunches.

- 2. Enter the size of the household in the **Household Size** box.
- 2. Enter the income amount in the appropriate **Income** box for up to two earners. You may enter the income as Weekly, Every 2 Weeks, Twice a Month, Monthly, or Yearly income amount.
- 3. Click **Calculate** and the determination will display immediately as **Free Meals**, **Reduced Meal Prices**, or **Not Eligible** (pertinent income cutoff information will be listed).

4. Depending upon the eligibility calculation, the results may be applied to the dependents of a specific family. The actions for doing so are documented below.

Locate the family desired by entering a portion of their name in the **Find** box. Then select the appropriate family from the **Contact List**. The dependents for that contact will then display in the **Student List**.

**Status Effective Date** Enter the date for which the status change is to take effect. This may cause some transactions and balances to adjust accordingly when the process is completed.

**Determination Made Date** Enter the date for the Determination Made record that will be created when the process is completed.

Make Dependents Free/Reduced/Paying The result determined on this screen may be applied to any dependents of the selected family by clicking Make Dependents Free/Reduced/Paying. Then a dialog will display asking you to confirm the changes in lunch status.

*Note:* If the newly determined result is applied to a student who has preexisting charges on their lunch account and the specified **Status Change Effective Date** encompasses dates for pre-existing charges, the student's lunch account balance will be adjusted by the appropriate amount (based on pricing levels appropriate for their new status and the number of affected breakfast or lunch transactions).

*Note:* Dependents of families are established by editing contact information by selecting <u>Edit-Student Data</u> (as outlined in the Attendance documentation for the JMC Office Application).

**Print Letter** To print an **Eligibility Notification Letter** for the specified family click **Print Letter**. The page will appear similar to Figure 13.

**Reset** To reset the Household Size and Income values entered on this screen, click **Reset**.

#### Lunch—Free/Reduced—Eligibility Notification Letter

This selection is used to generate eligibility notifications for lunch status changes to student contacts. It may also be used to change the lunch status for the contact's dependents.

1. Select <u>Lunch—Free/Reduced—Eligibility Notification Letter</u>. You will first be prompted to select a recipient for this letter from the contact data. After selecting a contact, the screen will appear similar to Figure 13.

Find Contact:	
1	•
Students: (Selected Aasimov, Aaron - R	d students will be affected)
Addition, Adron - K	<b>^</b>
	▼
L	
Parent/Guardian:	Jad Adamsking 324 1st St.
	PO Box 34
	Anywhere, IA 45627
Status:	Approved for Free
Reason:	Household Income 🔹
Other:	
Effective Date:	2/24/2017 Make Dependents 'Free'
Print Prices:	🗹 Breakfast 🗹 Lunch
Hearing Official:	Principal
Phone:	651-345-5555
Address:	123 4TH AVE
City, State, Zip:	Lake City, MN
Eligibility Official	
Phone:	651-345-555
Envelope:	🖉 Adjust for Windowed Envelope
View Letter	lake New Determination
them tetter) [14	

Figure 13: Eligibility Notification Letter screen.

- 2. Click on the **Status** menu to select the appropriate lunch status for the parent/guardian. Status menu options are:
  - a. Approved for Free
  - b. Approved for Reduced Price
  - c. Denied because Income Too High
  - d. Denied Other
- 3. Click on the **Reason** menu to specify a reason for the status change.
- 4. If **Denied Other** was selected from the **Status** menu, you may enter a brief description of the reason for the denial in the **Other** field.
- 5. Enter the Effective Date for the new lunch status in the Effective Date field.
- 6. You may click **Make Dependents Free/Reduced/Paying** in order to change the lunch status for all dependents of the currently displayed contact. Then a dialog will display asking you to confirm the changes in lunch status.

*Note:* If you had already done this step at an earlier point, such as on the **Determine Free or Reduced Status** page, you will not need to do this step again on this page.

*Note:* If the newly determined result is applied to a student who has preexisting charges on their lunch account and the specified **Effective Date** encompasses dates for pre-existing charges, the student's lunch account balance will be adjusted by the appropriate amount (based on pricing levels appropriate for their new status and the number of affected breakfast or lunch transactions).

*Note:* Dependents of families are established by editing contact information by selecting <u>Edit-Student Data</u> (as outlined in the Attendance documentation for the JMC Office Application).

6. You may enter information into the following fields: **Hearing Official**, **Phone**, **Address**, **City/State/Zip**, **Eligibility Official**, and **Phone**. Whatever is entered into these fields will be displayed on the eligibility notification letter.

*Note:* Values entered into these fields will remain until edited or removed.

- 7. There is an option to "Adjust for Windowed Envelope" if you are using windowed envelopes.
- 8. Click **View Letter** to preview the eligibility notification letter for the currently displayed contact. The letter will appear similar to Figure 14.
- 9. You may click **Make New Determination** in order to add a Determination Made record for all dependents of the currently displayed contact. Then a dialog will display asking you to confirm the creation of these records.

	Superville Public School-		
	Sunnyville Public Schools 1001 Sunset Drive		
	Sunnyville, MN 55555		
			8/26/2014
Andrew & Amy Adams 123 Fourth St			
Sunnyville, MN 55555			
Dear Parent/Guardian:			
Your application for free or reduced	price meals is APPROVED for FREE meals, effect	tive 8/26/2014.	
Your application was approved beca	use: your household income was within the eligibil	ity limits	
The cost for meals	in an follower:		
Dependent	Lunch	Breakfast	
Adams, Jim	\$ 0.00	\$ 0.00	
New for the 2014-2015 School Year:			
- Students who qualify for reduc	ced-price school meals will receive free lunches and	l breakfasts.	
- All kindergarten students quali	ify for free breakfasts.		
You may contact us if you do not age	ree with the decision about your meal application.	You may request a fair hearing by calling or writing	
William McAdoo			
108 W Center St.			
Sunnyville, MN 55555			
651-555-6789			
Sincerely,			
	Non-discrimination	on Statements	
Greg Gilmeister	Non-discrimination		<u></u>
Greg Gilmeister	will vary by state	and by year.	
Greg Gilmeister	will vary by state	and by year.	
Greg Gilmeister	will vary by state Rest assured that will have the mos	and by year. your letters t current non-	_
Greg Gilmeister	will vary by state	and by year. your letters t current non-	

Figure 14: Eligibility Notification Letter example.

#### Lunch—Free/Reduced—Direct Certification Export

This selection is used to generate a file of student records for upload to the state department as a request file for information about the students' direct certification status.

This option is only used by some states and sometimes only under specific circumstances.

Wisconsin – yes

Minnesota – private schools only - see Appendix C of this document Note: If Minnesota school does MARSS reporting, then the Direct Certification file is auto-generated based on MARSS data

Iowa – NO

- 1. Select <u>Lunch—Free/Reduced—Direct Certification Export</u>.
- 2. As needed, set the **Include Active Students** checkbox.
- 3. Click **Start Export** to generate the file.

#### Lunch—Free/Reduced—Direct Certification Import

This selection is used to import a file of Direct Certification records that may be available to you from your state department. Check with JMC for availability for your state.

*Note:* the page will include many state-specific instructions, such as how to acquire a Direct Certification file from your state department.

- 1. Select Lunch—Free/Reduced—Direct Certification Import.
- 2. Enter the **Effective Date**.
- 3. Address any state specific options (e.g. which type of direct cert file for Iowa).
- 4. Click Choose File to select the file you received from your state department.
- 5. Click Start Import to start the import process.
- 6. Upon completion of the import a summary of the process will show on your page. Included in the summary would be information about records that did or did not import and details about these results. Review the summary carefully and you may wish to print or save the summary to a PDF file for later referral.

#### Lunch—Free/Reduced—Direct Certification Notification Letter

This selection is used to generate Direct Certification notifications for students who were directly certified as receiving free breakfasts and lunches. Families receiving these notifications may then choose to refuse this eligibility if they wish.

1. Select <u>Lunch— Free/Reduced—Direct Certification Notification Letter</u>. The page will appear similar to Figure 15.

Building:	000 - JMC Demo District *
Selection Criteria:	All students directly certified as of effective date specified below <b>*</b>
Effective Date:	2/24/2017
Eligibility Official:	FRP Professional
Phone:	651-345-555
Sort By: Name Grade Advisor Print	Form Height: (a) 11 - 1 up (b) 11 - 1 up with Address

Figure 15: Direct Certification Notification Letter Specifications – Effective Date Option

- 2. Use the **Building** drop down list to specify the building if needed.
- 3. Use the **Selection Criteria** drop down list to select one of the following options:
  - All students directly certified as of effective date...
  - Ransom Family
- 4. Depending upon the option you specify in the **Selection Criteria** drop down list you will need to specify additional information.

For the *Effective Date option* you would need to specify the Effective Date that was specified when the Direct Certification file was imported. All students/families that have a direct certification record for that effective date will then have a letter generated by this option.

For the *Random Family option* you would need to specify the family that is to receive the letter generated by this option. See Figure 16 for an example of how the age would appear for this option.

Building:	000 - JMC Demo District V
Selection Criteria:	Random Family
Selection circena.	Students:
Find Contact:	Aasimov, Aaron
Parent/Guardian: Dad Adamsking 324 1st St. PO Box 34 Anywhere, IA 45627	
	-
Effective Date:	2/24/2017
Eligibility Official:	FRP Professional
Phone:	651-345-555
Sort By:	Form Height:
Name	® 11 - 1 up
<ul> <li>Grade</li> <li>Advisor</li> </ul>	11 - 1 up with Address
Print	

Figure 16: Direct Certification Notification Letter Specifications - Random Option

- 5. Revise the **Eligibility Official** and **Phone Number** as needed.
- 6. If using the *Effective Date option*, specify the **Sort By** option as desired.
- 7. Specify the **Form Height** option as desired.
- 8. To save the **Direct Certification Notification Message**, **Eligibility Official**, and **Phone Number**, click **Save**.
- 9. Click **Print** to print the Direct Certification Notification Letters. See Figure 17 for a sample of how this letter will appear.

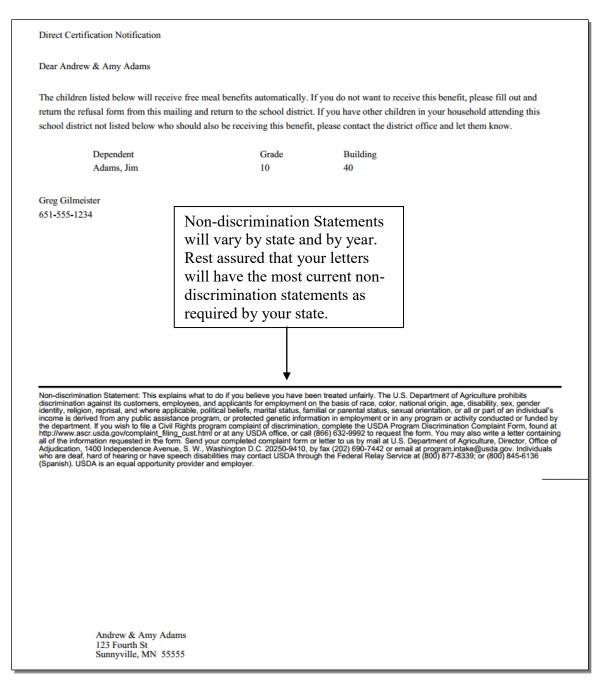


Figure 17: Direct Certification Notification Letter Specifications - Sample

#### Lunch—Data Setup—Edit Pricing Groups

This selection is used to establish pricing groups for different grade level groupings. Up to 6 pricing groups may be established. Pricing groups may be used to set different menu selections and/or different pricing structures for each building or other grade level group.

*Note*: Pricing Groups should only be established before the start of the school year.

*Note*: By default there will be one pricing group for grades 0 - 12.

*Note*: Adults should be assigned a grade level that will place them in the proper pricing group. Grade levels may be assigned by using <u>Edit - Student Data</u>.

1. Select <u>Lunch—Data Setup—Edit Pricing Groups</u>. A screen will appear similar to Figure 18.

Print				
		Grade Range		*
	Group	From Grade	To Grade	
Edit Delete	1	KA	EC	
Edit Delete	2	KG	KG	
Edit Delete	3	1	12	
Edit Delete	4			
Edit Delete	5			
Edit Delete	6			
				-

Figure 18: Edit Pricing Groups screen.

2. Edit the grade ranges for each pricing group as needed.

*Note:* No overlap is allowed between grade ranges for the various pricing groups. In other words, each grade level can be in only one pricing group.

Note: All grades for your school district must be represented in the grade ranges.

#### Lunch— Data Setup — Edit Meal Prices

This selection is used to edit meal prices for various breakfast and lunch situations. This includes price variations for regular, free, or reduced lunches as well as meal variations such as breakfast, lunch, extra milk, etc. Rates may be set differently for adults and students. Federal and state reimbursement rates are entered on this screen, as well.

## 1. Select <u>Lunch—Data Setup—Edit Meal Prices</u>. The page will appear similar to Figure 19

unnyville	yville ISD		05/21/2015	5 - Thursda	Day: 177 - 05/21/2015 - Thursday				
rice Group	ps: Grades 1 to 12 💌	Print							
reakfast -	Grades 1 to 12						*		
Meal N	ame	Description		Individual	State I	Federal			
dit Student	Breakfast	Student Breakfast		1.10	0.5500 0	0.2800			
dit Reduced	d Breakfast	Reduced Breakfast		0.00	0.3000 1	1.3200			
dit Free Bre	eakfast	Free Breakfast		0.00	0.0000 1	1.6200			
Edit Student	Extra Milk	Student Extra Milk		0.45	0.0000 0	0.0000			
dit Adult Br	reakfast	Adult Breakfast		2.50	0.0000 0	0.0000			
dit Adult Ex	ktra Milk	Adult Extra Milk		0.45	0.0000 0	0.0000			
Edit Alternat	ive Student Breakfast 1	Alternative Student Brea	akfast 1	2.00	0.5500 0	0.2800			
dit Alternat	ive Reduced Breakfast 1	Alternative Reduced Bre	akfast 1	0.90	0.3000 1	1.3200			
dit Alternat	ive Free Breakfast 1	Alternative Free Breakfa	ist 1	0.00	0.0000 1	1.6200			
dit Alternat	ive Student Breakfast 2	Alternative Student Brea	akfast 2	3.00	0.5500 0	0.2800			
		Alternative Reduced Bre	akfast 2	0.00	0.3000 1	1.3200			
dit Alternat	tive Reduced Breakfast 2	Alternative Reduced bre							
	ive Reduced Breakfast 2 ive Free Breakfast 2	Alternative Free Breakfa		0.00	0.0000 1	1.6200	*		
Edit Alternat				0.00	0.0000 1	1.6200	*		
Edit Alternat	ive Free Breakfast 2	Alternative Free Breakfa				1.6200	-		
Edit Alternat	ive Free Breakfast 2 ades 1 to 12	Alternative Free Breakfa	ist 2		Fe		~		
Edit Alternat	ades 1 to 12 Meal Name Student Lunch Reduced Lunch	Alternative Free Breakfa Descriptio Student Lunch Reduced Lunch	n Individual 2.20 0.00	<b>State</b> 0.1250 0.5250	Fe 0.3 2.6	e <b>deral</b> 3400 5400	* E		
Edit Alternat	ive Free Breakfast 2 des 1 to 12 Meal Name Student Lunch	Alternative Free Breakfa Descriptio Student Lunch Reduced Lunch Free Lunch	n Individual 2.20 0.00	<b>State</b> 0.1250	Fe 0.3 2.6	e <b>deral</b> 3400	•		
edit Alternat unch - Gra edit edit edit	ades 1 to 12 Meal Name Student Lunch Reduced Lunch Free Lunch Student Extra Milk	Alternative Free Breakfa Descriptio Student Lunch Reduced Lunch Free Lunch Student Extra Milk	n Individual 2.20 0.00 0.45	<b>State</b> 0.1250 0.5250	Fe 0.3 2.6 3.0	e <b>deral</b> 3400 5400			
Edit Alternat	ive Free Breakfast 2 ides 1 to 12 Meal Name Student Lunch Reduced Lunch Free Lunch	Alternative Free Breakfa Descriptio Student Lunch Reduced Lunch Free Lunch Student	n Individual 2.20 0.00 0.45	<b>State</b> 0.1250 0.5250 0.1250	Fe 0.3 2.6 3.0 0.0	<b>3400</b> 5400 0400			
edit Alternat unch - Gra edit edit edit	ades 1 to 12 Meal Name Student Lunch Reduced Lunch Free Lunch Student Extra Milk	Alternative Free Breakfa Descriptio Student Lunch Reduced Lunch Free Lunch Student Extra Milk Adult Extra Milk	n Individual 2.20 0.00 0.45	State 0.1250 0.5250 0.1250 0.0000	Fe 0.3 2.6 3.0 0.0	e <b>deral</b> 3400 5400 0400			
adit Alternat	ades 1 to 12 Meal Name Student Lunch Reduced Lunch Free Lunch Student Extra Milk Adult Lunch	Alternative Free Breakfa Descriptio Student Lunch Reduced Lunch Free Lunch Student Extra Milk Adult Lunch Adult Lunch	n Individual 2.20 0.00 0.45 3.45	<b>State</b> 0.1250 0.5250 0.1250 0.0000 0.0000	Fe 0.3 2.6 3.0 0.0 0.0	ederal 3400 5400 0400 0000	E		

Figure 19: Edit Meal Prices page.

**Select a Price Group** Select the pricing group you wish to edit from the menu in the upper left corner. The pricing groups will be specified by their respective grade ranges.

**Editing Meal Name** To edit a Meal Name on the Edit Meal Prices page, click the **Edit** link for the line you wish to edit, type in a new value, and then click the **Update** link for that line to save the changes. See example in Figure 18.

**Editing Costs** To edit a cost on the Edit Meal Prices page, click the **Edit** link for the line you wish to edit, type in a new value, and then click the **Update** link for that line to save the changes. Individual costs reflect the actual price paid by a student or adult. State and Federal costs represent the amount to be reimbursed by the state/federal government for each meal or milk.

**Print** To print the table of information displayed on the Edit Meal Prices page, click **Print**.

#### Lunch— Data Setup — Edit A La Carte Prices

This selection is used to edit prices for various breakfast and lunch a la carte items. A La Carte items may be defined simply by adding them to the list.

1. Select <u>Lunch—Data Setup—Edit A La Carte Prices</u>. A page will appear similar to Figure 20.

real	kfast - Grades KG to KG		-	Lunc	<u>h - Grades KG to KG</u>	
	Item Name	Cost			Item Name	Cost
dit	Student 2nd Breakfast	1.00		Edit	Student Second Lunch	2.00
dit	Breakfast Sandwich	1.50		Edit	Program Lunch	0.00
dit	Juice	1.50		Edit	Juice	1.50
dit	Bottle Water	1.00		Edit	Bottle Water	1.00
dit	Cookie	1.00		Edit	Cookie	1.00
dit	Chips	1.00		Edit	Chips	1.00
dit	Pop Tart	1.00		Edit	Pop Tart	1.00
dit	Entree	2.00		Edit	Sandwich / Entree	2.00
dit	Ice Cream	1.50		Edit	Ice Cream	1.50
dit	Granola Bar	0.75		Edit	Granola Bar	0.75
dit	Fruit Chews	0.75		Edit	Fruit Chews	0.75
dit	Caramel Corn	2.00		Edit	Caramel Corn	2.00
dit	Fruit / Veggies	0.50		Edit	Fruit / Veggies	0.50
dit	Yogurt / Stg Cheese	0.50		Edit	Yogurt/ Stg Cheese	0.50
dit	Milk	0.45		Edit	Milk	0.45
dit	Extra Sauce	0.25		Edit	Extra Sauce	0.25
dit	Salad	3.00		Edit	Salad	3.00
dit	Snack Pack	3.00		Edit	Snack Pack	3.00
dit	Personal Pizza	3.00		Edit	Personal Pizza	3.00
dit	Adult Breakfast	2.50		Edit	Adult Lunch	3.45
dit		0.00		Edit		0.00
dit		0.00		Edit		0.00
dit		0.00		Edit		0.00
dit		0.00		Edit		0.00
dit		0.00		Edit		0.00
dit		0.00		Edit		0.00
dit		0.00		Edit		0.00
dit		0.00		Edit		0.00
dit		0.00	+	Edit		0.00

Figure 20: Edit A La Carte Prices screen.

**Select a Pricing Group** Select the pricing group you wish to edit from the menu in the upper left corner. The pricing groups will be specified by their respective grade ranges.

**Editing Item Names and/or Costs** To edit the name or cost of an item on the Edit A La Carte Prices page, click the **Edit** link for the line you wish to edit, type in a new value, and then click the **Update** link for that line to save the changes.

*Note*: Up to 40 A La Carte items may be defined for each meal.

*Note:* The names of the first two item names in the lunch list, Student Second Lunch and Program Lunch, are not editable.

*Warning*: A La Carte items should not be moved within these lists once purchases have been made using these price tables.

*Note:* Price changes can be made to retroactively affect past transactions.

**Print** To print the table of prices displayed on the Edit A La Carte Prices page, click **Print**.

#### Lunch— Data Setup — Edit Low Balance Limit

This selection is used to edit the Low Balance Limit for account transactions. Transactions at the Point of Sale that cause a student's balance to fall below this threshold will result in a warning issued on the Point of Sale screen.

1. Select Lunch—Data Setup—Edit Low Balance Limit.

**Low Balance Limit** To enter a new amount for the Low Balance Limit, type a new number in the **Low Balance Limit** box.

Save To save changes to the Edit Low Balance Limit screen, click Save.

#### Lunch— Data Setup — Import Account Balances from Prior Year

This selection is used to import lunch account balance from a prior year into the current year's data.

- 1. Select Lunch—DataSetup—Import Account Balances from Prior Year.
- 2. If lunch transactions have already been processed for the current school year, a warning will appear in red at the top of the page.
- 3. Enter the **Effective Date** to be assigned to the resulting account credit(s). Click **Import** to continue.
- 4. If **Import** was clicked, a dialog will pop up asking you to confirm this action. Click **OK** to continue the importation process or click **Cancel** to return to the page.

#### Lunch— Data Setup — Import Free & Reduced Status from Prior Year

This selection is used to import students' free and reduced status from a prior year into the current year's data.

- 1. Select Lunch—Data Setup—Import Free and Reduced Status from Prior Year.
- 2. If lunch transactions have already been processed for the current school year, a warning will appear in red at the top of the page.
- 3. Enter the **Effective Date** imported status changes become effective. Click **Import** to continue.
- 4. If **Import** was clicked, a dialog will pop up asking you to confirm this action. Click **OK** to continue the importation process or click **Cancel** to return to the page.

#### Lunch— Data Setup — Initialize Family Lunch Contacts

This selection is used to initialize family lunch contacts for all students in the current year's data. The process will generate a family lunch contact for students who have designated at least one primary contact but no lunch contact. If a student has more than one primary contact designated, this process will use the first primary contact listed to create the lunch contact. If a student does not have a primary contact designated, then this process will not generate a lunch contact for that student.

- 1. Select <u>Lunch—Data Setup—Initialize Family Lunch Contacts</u>.
- 1. Click Create Lunch Contacts to continue.
- 2. If **Create Lunch Contacts** was clicked, a dialog will pop up asking you to confirm this action. Click **OK** to continue the initialization process or click **Cancel** to return to the page.
- 3. One the process has completed, a message will appear indicating the number of lunch contacts generated. These can be verified by searching the students' Contacts popup menu on the Edit- Student Data screen and locating the lunch contact.

*Note:* A student may only have one lunch contact designated.

*Note:* Students' lunch contacts may also be edited individually on <u>Edit-Student</u> <u>Data</u>.

#### Lunch—Reports—Meals Served

This selection is used to generate a report for the number and value of meals served during the designated day or time span.

The report will consist of up to two parts for each meal designation checked as included; the first part would list all pertinent transactions summarized by the number of units served, and the second part would list all pertinent transactions summarized by the overall value (cost) of the units served. If more than one date is specified in the date range, a summary for each date will be listed on subsequent rows in the report and an overall summary will be at the end of the list.

1. Select <u>Lunch—Reports—Meals Served</u>. The page will appear similar to Figure 21.

Building Number: All     ▼       Pricing Group: Grades 1 to 12     ▼       From Grade: 1     ▼       From Date: 8/27/2014     Image: 8/27/2014	Include: Breakfast - Summary Breakfast - Detail Lunch - Summary Lunch - Detail Extra Milk - Summary Extra Milk - Detail
Preview Print	

Figure 21: Meals Served Report selection criteria.

- 2. Specify the building number in the **Building Number menu**.
- 3. Specify the pricing group in the **Pricing Group menu**.
- 4. Specify the range of **Grades** for the report.
- 4. Specify the transaction **Date** or range of dates for the report.
- 5. Click on the appropriate checkboxes to include breakfast, lunch, and/or exrtra milk and their details in the report.
- 6. Click **Preview** to preview the report in the window at the bottom of the page.
- 7. Click **Print** to print the report.

#### Lunch—Reports—A La Carte Items Served

This selection is used to generate a report for the A La Carte items served during the designated day or time span.

The report will consist of 2 parts; the first part will list all a la carte item transactions summarized by the number of units served, and the second part will list all a la carte item transactions summarized by the overall value (cost) of the units served. If more than one date is specified in the date range, a summary for each date will be listed in subsequent columns in the report and an overall summary will be in the last column.

1. Select <u>Lunch—Reports—A La Carte Items Served</u>. The page will appear similar to Figure 22.



Figure 22: A La Carte Items Served Report selection criteria.

- 2. Specify the building number in the **Building Number menu** if logged in at the District level.
- 3. Specify the pricing group in the **Pricing Group menu**.
- 4. Specify the range of **Grades** for the report.
- 5. Specify the transaction **Date** or range of dates for the report.
- 6. Click **Preview** to preview the report in the window at the bottom of the page.
- 7. Click **Print** to print the report.

#### Lunch—Reports—A La Carte Items Detail

This selection is used to generate a report for the A La Carte items served during the designated day or time span. This report is similar to  $\underline{\text{Lunch} - \text{Reports} - \text{A La Carte}}$ <u>Items Served</u> but also includes a record of every A La Carte item purchased during that span, including the name of the student who purchased the item, their contact information, and their lunch status at the time of the purchase.

The user may select which A La carte items to include in the report: All, All Breakfast, All Lunch, or individual A La Carte items.

The report is organized by A La Carte item and each section includes counts for paid student, reduced, free, and total units.

1. Select <u>Lunch—Reports—A La Carte Items Detail</u>. The page will appear similar to Figure 23.

Sunnyville High Sch	nool	Day: 177 - 05/21/2015 - Thursday	2014-2015
Pricing Group:	Grades 1 to 12	]	
A La Carte Items:	All	]	
From Grade: 1 💌	To Grade: 12 💌		
From Date: 2/13/20	15 <b>To Date:</b> 2/13/2015		
Preview Print			
			<u>^</u>

Figure 23: A La Carte Items Details Report selection criteria.

- 2. Specify the building number in the **Building Number menu** if logged in at the District level.
- 3. Specify the pricing group in the **Pricing Group menu**.
- 4. Specify the A La Carte items for this report in the A La Carte Items menu.
- 5. Specify the range of **Grades** for the report.
- 6. Specify the transaction **Date** or range of dates for the report.
- 7. Click **Preview** to preview the report in the window at the bottom of the page.
- 8. Click **Print** to print the report.

### Lunch—Reports—Lunch Status

This selection is used to generate a report for the lunch status of all students in the database during a date span specified by the user.

The report will consist of up to four parts, one for each lunch status. The four lunch status types are Student Paying, Student Reduced, Student Free, and Adult Paying. Each of the four parts will print only if there are students with that status. For example, the Adult Paying part of the report will not print unless there are students/adults in the JMC data with that status.

Each of the reports will list all students with that particular status in alphabetical order and will list their JMC student number and grade, as well. Also, students who experienced a change in lunch status during the specified date span will be so designated on the report.

The report for Free students will include a breakdown based on details recorded for the students' lunch status records. Breakdowns will include:

- Direct Certified SNAP
- Direct Certified FDPIR
- Direct Certified TANF
- Direct Certified Foster Status
- Direct Certified Migrant Status
- Direct Certified Runaway, Homeless, HeadStart, EarlyHeadStart
- Direct Certified Other Free
- Direct Certified SNAP Letter Method
- Direct Certified no details
- Direct Certified Total
- Determination Made Approved Free Categorically Eligible
- Determination Made Approved Free Income and/or Household Size
- Determination Made Approved Free FDPIR
- Determination Made Approved Free no details
- Determination Made Approved Free Total

Also, if any discrepancies exist between student lunch status and status change records, an additional report will be included at the end that lists the discrepancies. If any such discrepancies exist, you may wish to contact JMC for advice on how they should be handled.

Please note that this report relies upon details included with lunch status changes and related transactions. If you manually entered the student's lunch status changes and related transaction records you must supply expected details at that time; otherwise the record will be tallied in the "No Details" breakdowns and the student will have an "N" in their row in the Details column.

A student's lunch status can be modified on the following screens: <u>Lunch-Data-Edit</u> <u>Student Lunch Data</u>, <u>Lunch-Free/Reduced-Determine Free Or Reduced Status</u>, and <u>Edit-Edit Student Sensitive Data</u>. In all three cases, the JMC Office Application user must be granted "Make Changes" access to Sensitive data for them to modify a student's lunch status. Users may check their current access levels by selecting <u>File-Who Am I</u>.

1. Select <u>Lunch—Reports—Lunch Status</u>. The page will appear similar to Figure 24.

JMC Demo District	Day: 156 - 02/24/2017 - Friday	2016-2017
Building Number: 109 - JMC Demo School V Pricing Group: Grades 7 to 12 V From Date: 2/24/2017 To Date: 2/24/2017 Preview Print Export	Sort Options for Free Students:      By Description then Student Norte Only     By Student Name Only	lame
		*

Figure 24: Lunch Status Report selection criteria.

- 2. Specify the building number in the **Building Number menu** if logged in at the District level
- 3. Specify the pricing group in the **Pricing Group menu**.
- 4. Specify the transaction **Date** or range of dates for the report.
- 5. Specify the sort order for Free Students.
- 6. Click **Preview** to preview the report in the window at the bottom of the page.
- 7. Click **Print** to print the report.
- 8. Click **Export** to export the report to a text file.

### Lunch—Reports—Benefit Issuance List

This selection is used to generate a report for the lunch status of all students in the database for a date specified by the user.

The report will consist of one section that includes all free and reduced lunch status students sorted alphabetically by name.

Each student row will include some demographic data (student DI, name, grade, building, date of birth, state ID, etc.) plus their lunch status (free or reduced only in this report), approval date, description, and method.

Please note that this report relies upon details included with lunch status changes and related transactions. If you manually entered the student's lunch status changes and related transaction records you must supply expected details at that time; otherwise the

record will be tallied in the "No Details" breakdowns and the student will have an "N" in their row in the Details column.

A student's lunch status can be modified on the following screens: <u>Lunch-Data-Edit</u> <u>Student Lunch Data</u>, <u>Lunch-Free/Reduced-Determine Free Or Reduced Status</u>, and <u>Edit-Edit Student Sensitive Data</u>. In all three cases, the JMC Office Application user must be granted "Make Changes" access to Sensitive data for them to modify a student's lunch status. Users may check their current access levels by selecting <u>File-Who Am I</u>.

1. Select <u>Lunch—Reports—Benefit Issuance List</u>. The page will appear similar to Figure 25.

		9/7/2017							
Preview Print Export									
Building Lunch S		: Free and Reduced	Grade Date:		17				
Number	ID	Name	Grade	Building	Date of Birth	State ID	Status	Approval Date	Description
1	2501	Aaseth, James	2	109			R	08/07/2017	Direct Certification - Approved for Reduced
2	3456	Aaseth, John	11		04/10/1996	1234567890	F		Determination Made - Approved for Free La
3	69	Aasimov , Abbie	6	109			F		Determination Made - Approved for Free
4	70	Aasimov, Aaron	8	109			R	07/18/2016	Determination Made - Approved for Reduce
5	165	Aasimov, Allison	4	109			F		Direct Certification - Approved for Free
	78	Beale, Lucas Kim	10	109			F		Determination Made - Approved for Free La
	45	Bernadone, Francis M	10		05/14/2014		R		Determination Made - Approved for Reduce
8	6000	Bernadone, Jim	9	109			R		Determination Made - Approved for Reduce
Э	50	Bernandone, Judy	4	109			R	07/31/2017	Determination Made - Approved for Reduce
10	46	Estherville, Esther	11	109			F	07/18/2016	Determination Made - Approved for Free La
11	106	Example, Student	4	109			F	07/18/2016	Determination Made - Approved for Free La
12	64	Freid, Jeff	1	109			F	03/15/2017	Determination Made - Approved for Free La
13	23	Freid, John	1	109			F		Determination Made - Approved for Free La
	112	last, first	0	109			R		Determination Made - Approved for Reduce
15	28	Plaine, Belle	0	109			R		Determination Made - Approved for Reduce
16	36	Smith, Dave	1	109			R	08/29/2016	Determination Made - Approved for Reduce
17	53	Smith, Jane	7	109			R	08/29/2016	Determination Made - Approved for Reduce
18	77	Smith, Jennifer	11	109			R	08/29/2016	Determination Made - Approved for Reduce
19	65	Smith, John	1	109			F	07/18/2016	Determination Made - Approved for Free La
20	151	Smith, Tanya	6	109			R	07/31/2017	Determination Made - Approved for Reduce
21	123	Testing, Angela	10	109	05/24/2000		F		Determination Made - Approved for Free La
22	74	Today, Yesterday N	11	109	01/17/1998		F	07/18/2016	Determination Made - Approved for Free La

Figure 25: Lunch Status Report selection criteria.

- 2. Set the check box appropriately for including inactive students.
- 3. Specify the transaction **Date** or range of dates for the report.
- 4. Click **Preview** to preview the report in the window at the bottom of the page.
- 5. Click **Print** to print the report.
- 6. Click **Export** to export the report to a CSV text file which can be opened directly in Excel.

### Lunch—Reports—Balance Sheet

This selection is used to generate a balance sheet containing a list of all students whose account balances are below the specified balance or will run out of money within a specified number of days.

When running this report using the **Select by Days** option, the students' lunch transactions will be used to determine whether their accounts will run low in the specified number of days. If a student has at least 10 transactions on their lunch account, then that student's average daily lunch expense will be used to determine whether they will be listed on this report. If a student has fewer than 10 but more than 0 lunch transactions on their account, then a rate of one lunch per day, priced according to the student's current lunch status, will be used to determine whether they will be listed on this report.

When running this report using the **Select by Balances** option, a minimum balance and a minimum reduced balance will be used to determine whether student will be listed on the report.

The report will contain a list of family and student accounts that will have a low balance according to the specified criteria. Students who have a lunch contact designated will appear underneath their lunch contact's name.

1. Select <u>Lunch—Reports—Balance Sheet</u>. The page will appear similar to Figure 26.

Days	
All Accounts     Minir	mum Balance:
Preview Print Export	

Figure 26: Balance Sheet selection criteria for Select by Days.

- 2. Specify either Days, Balances, All Accounts, Nonzero Accounts, or Nonzero Accounts with Grade 12 from the Select By options.
- 3. If **Days** is specified, enter the number of days that are to be used in the report. See Figure 26.
- 4. If **Balances** is specified, enter the minimum balance and minimum reduced balance for the Balance Sheet report.
- 5. Click **Preview** to preview the report in the window at the bottom of the page.
- 6. Click **Print** to print the report.
- 7. Click **Export** to export the report to a text file.

### Lunch—Reports—Low Balance Notices

This selection is used to generate notices of low lunch account balances. The user can either specify the number of days in which the accounts will run low or specify the minimum amount to be used as a cutoff value for selecting the recipients of these notices. The user can also create a message that will be printed on each notice.

When generating notices using the **Select by Days** option, the students' lunch transactions will be used to determine whether their accounts will run low in the specified number of days. If a student has at least 10 transactions on their lunch account, then that student's average daily lunch expense will be used to determine whether a notice is generated. If a student has fewer than 10 but more than 0 lunch transactions on their account, then a rate of one lunch per day, priced according to the student's current lunch status, will be used to determine whether a notice is generated.

When running this report using the **Select by Balances** option, a minimum balance and a minimum reduced balance will be used to determine whether a notice is generated.

When running this report using the **Select by All Accounts** option, a notice will be generated for all family and student accounts.

Low balance notices will be generated according to the specified criteria. Students who have a lunch contact designated will appear on the low balance notice for their lunch contact.

- 1. Select <u>Lunch—Reports—Low Balance Notices</u>. A screen will appear similar to Figure 27.
- 2. Specify either Days, Balances, or All Accounts from the Select By options.
- 3. If Select by **Days** is specified, enter the number of days that are to be used in the report.
- 4. If Select by **Balances** is specified, enter the minimum balance and minimum reduced balance for the Balance Sheet report.
- 5. Specify the **Sort By** option for report.
- 6. Specify the **Form Height** for the report.
- 7. Specify the **Building** for the report.
- 8. To attempt to call this notice to lunch contacts with phone numbers associated with their contact information, click on the option **Call If Possible**.

*Note:* This option requires the use of the JMC Next Gen Message Center feature. Contact JMC for more information about the Message Center feature.

9. To attempt to email this notice to lunch contacts with email addresses associated with their contact information, click on the option **Email If Possible**. If using this option you should also specify a **Reply To Email** address.

Select By:	
Days	Accounts that will run out in 5 days.
Balances	Minimum Balance:
All Accounts	
Sort By:	Form Height:
Name	● 11 - 1 up
Grade	0 11 - 1 up with Address
Advisor	0 11 - 2 up
Building: 000 -	My District
Call If Possi	ble
Email If Pos	sible
Reply To Email	
🔲 Include Ina	ctive Students
Lunch Notice M	essage:
Please send a de	eposit to school for your lunch account.
You may review	your account on the Sunnyville School Website.
	Save
Thank you, Sunnyville Schoo	
1001 Sunset Driv Sunnyville, MN 5	
	2000 A
Print	

Figure 27: Low Balance Notice setup screen.

- 10. Inclusion of inactive students is governed by the setting for the **Include Inactive Students** checkbox. Make sure this option is set appropriately.
- 11. Enter a message to be included in the Lunch Notice Message.
- 12. If you wish to save this message for future use, click **Save**.
- 13. Click **Print** to generate the reports.

### Lunch—Reports—Summary

This selection is used to generate a summary report of all transactions for the specified date or range of dates.

The first part of the report is a summary of each individual lunch account with a complete breakdown of items, costs, and balances for the specified period. Students who have a lunch contact designated will appear underneath their lunch contact's name.

The second part of the report summarizes the number of breakfasts and lunches served for students, adults, and other categories. The student summaries are organized by building number if more than one building is contained in the data, then by grade and pricing group.

An option is available to print only accounts with payments during the designated transaction date span. If this option is selected, the report summary will not include the complete breakdown described above; instead, the summary will contain a breakdown of deposits recorded by POS and office users.

1. Select <u>Lunch—Reports—Summary</u>. A screen will appear similar to Figure 28.

From Date: 8/27/2014 To Date: 8/27/2014
Show Payments Only
Preview Print Export

Figure 28: Summary Report selection criteria.

- 2. Specify the transaction date or range of dates for the Summary report.
- 3. To have the first part of the report show only students with payments during the designated transaction date span, click on the **Show Payments Only** checkbox.
- 4. Click **Preview** to preview the report in the window at the bottom of the page.
- 5. Click **Print** to print the report.
- 6. Click **Export** to export the report to a text file.

### Lunch—Reports—Last Payments Detail

This selection is used to generate a report of all payments (deposits) for the specified date or range of dates.

If family accounts are being used then the report will be organized by family accounts with student accounts listed under the family lunch contact.

The payment amount and date of the payment will be included as well as the balance for the date specified. The first two phone numbers for the lunch contact will be included for the convenience of staff who may be making calls to parents who have not made a payment in a while.

1. Select <u>Lunch—Reports—Last Payments Detail</u>. The page will appear similar to Figure 29.

From Date: 8/27/2014 To Date: 8/27/2014	Include Pay Lunch Status Only
Building: 000 - My District	Sort by Lowest Balance
Preview Print Export	

Figure 29: Last Payments Detail selection criteria.

- 2. Specify the deposit **Date** or range of dates for the report.
- 3. Specify the **Building** for the report.
- 4. To have the report show only students with lunch status **Paying**, click on the **Include Pay Lunch Status Only** checkbox.
- 5. The report is normally sorted alphabetically by account name. To have the report sorted by balance instead, click on the **Sort By Lowest Balance** checkbox.
- 6. Click **Preview** to preview the report in the window at the bottom of the page.
- 7. Click **Print** to print the report.
- 8. Click **Export** to export the report to a text file.

### Lunch—Reports—Reimbursables

This selection is used to generate a summary report of all transactions for the specified transaction date or range of dates.

This report contains a collective summary broken down by meal categories: breakfasts, lunches, breakfast a la carte, lunch a la carte, breakfast extra milk, and lunch extra milk. These categorical summaries are further broken down according to regular, free, reduced, and adult statuses as well as tallies and totals for individual, state, and federal costs. Also, tallies for meals served during the specified date span are listed with breakdowns by meal, grade level, adults, and other categories.

1. Select <u>Lunch—Reports—Reimbursables</u>. The page will appear similar to Figure 30.

Building Number: All
Pricing Group: Grades 1 to 12
From Grade: 1 <b>To Grade:</b> 12 <b>T</b>
From Date: 8/27/2014 To Date: 8/27/2014
Preview

Figure 30: Reimbursables Report selection criteria.

- 2. Specify the building number in the **Building Number** menu.
- 3. Specify the pricing group in the **Pricing Group** menu.
- 4. Specify the **Grade** range for the report.
- 5. Specify the **Date** or range of dates for the report.
- 6. Click **Preview** to preview the report in the window at the bottom of the page.
- 7. Click **Print** to print the report.

### Lunch—Reports—Claims Edit Check

This selection may be used to analyze the reasonableness of free and reduced breakfast and/or lunch claims for reimbursement by utilizing attendance, lunch status, meals served, and membership count information. These reports may be generated monthly and kept on file to assist schools in demonstrating compliance in breakfast and/or lunch claims reporting.

1. Select <u>Lunch—Reports—Claims Edit Check.</u> A screen will appear similar to Figure 31.

Building Number: All	T
Pricing Group: Grades 1 to 12 🔻	
From Date: 1 - 08/18/2014 - Monday	▼ To Date: 8 - 08/27/2014 - Wednesday ▼
Attendance Factor: 94.60 %	
Include: 🗹 Breakfast 🗹 Lunch	
Preview Print	



- 2. Specify the building number in the **Building Number** menu.
- 3. Specify the pricing group in the **Pricing Group** menu.
- 4. Specify the **Date** or range of dates for the report.
- 5. Modify the Attendance Factor as needed.

*Note:* The **Attendance Factor** is a percentage, typically around 94-97%, that represents the maximum allowable claims per group per month based on federal lunch reporting guidelines. The **Attendance Factor** may change from year to year but would likely stay the same for the entire school year. Please check with appropriate state department officials each fall for assistance in determining the appropriate **Attendance Factor** for a given school year.

- 6. Select a report for breakfast and/or lunch by checking the appropriate checkboxes. If both options are checked, a separate report will be generated for each option.
- 7. Click **Preview** to view the report. The report will appear similar to Figure 32.
- 8. Click **Print** to print the report. The report will appear similar to Figure 32.

Based on number that meals were during specified	served date range	/2014 to 08/2	01 SC	n report	entered t criteria Grades 1 to	D 12		Buildin		cfast Cla	ims Edi	ADA, determine same as if were generated	it by
	Number of Se	erving Days th	is Span: 5	,	Attendance	e Factor: 94	60%	Averag	e Daily Atte	endance	502.7	an Attend Totals Re	
Information				-		iced Breakfa					L		
similar to	Date	Eligible x	94.60%	Served	Eligible	x 94.60%	Served	Eligible	x 94.60%	Served	Total	Eligible	
Meals Served	/18/2014	324	306.5	3	56	53.0	2	129	122.0	4		509	
& _	8/19/2014	324	306.5	30	56	53.0	7	130	123.0	21		510	
Membership	8/20/2014	324	306.5	17	56	53.0	9	130	123.0	20		510	
Count	8/21/2014	324	306.5	45	56	53.0	14	130	123.0	31		510	
&	8/22/2014	324	306.5	42	56	53.0	16	130	123.0	31		510	
Lunch Status													
Reports	Totals	1620	1532.5	137	280	264.9	48	649	614	107		2549	
	Averages	324.0	306.5	27.4	56.0	53.0	9.6	129.8	122.8	21.4		509.8	
	Averages (Pric	r)											
	* The Average	Daily Attendan	e listed ab	ove is aff	fected by th	e							
	different caler	dars for one or	more grade	e levels. S	See below fo	or the							
Information		age Daily Atten	dance figur	es organi	zed by grad	le level							
may be	for this pricing	group.											
manually		All		-									
filled in		Attendance(Gra			i4.00 (5 da								
after report		Attendance(Gra	· · · · ·		i7.20 (5 da								
is printed		Attendance(Gra			i1.20 (5 da								
		Attendance(Gra			19.60 (5 da								
	Average Daily	Attendance(Gra	ade 5)	4	1.60 (5 di	avs)							

Figure 32: Claims Edit Check report sample.

### Lunch—Reports—Missing Application Check

This selection may be used display free and reduced students without an approved application based on the existence of "Determination Made - Approved for Free". "Determination Made - Approved for Reduced", or "Direct Certification - Approved for Free" lunch status records for the current school year.

This option can also be used to change the lunch status to "Paying Student" for students listed on the page.

1. Select <u>Lunch—Reports—Missing Application Check.</u> The page will appear similar to Figure 33.

Free/Reduced Students without an Approved Application: (based upon a status of "Determination Made-Approved for Free", "Determination Made-Approved for Reduced", or "Direct Certification-Approved for Free")							
Effective Print	Effective Date: 8/27/2014 Effective Date: 8/27/2014 Change Status to Paying Student						
IIAII	StudentID 1193	<b>Grade</b> 0	Student Name Last, First	<b>Status</b> Reduced Student	^		

Figure 33: Missing Application Check.

- 2. Specify the **Effective Date** for the report.
- 3. To change the status of a student or students to "Paying Student" first select the students to be changed by clicking the All checkbox or by checking students individually and then click Change Status to Paying Student.

### Lunch—Reports—Random 3% of Free/Reduced Accounts

This selection may be used display a list of randomly selected family or student accounts with one or more students designated as either free or reduced.

- 1. Select Lunch—Reports—Random 3% of Free/Reduced Accounts.
- 2. Click **Preview** to preview the report in the window at the bottom of the page.
- 3. Click **Print** to print the report.

### Lunch—Reports—Error Prone 3% of Free/Reduced Accounts

This selection may be used display a list of randomly selected family or student accounts where the application was considered error prone because the family income was within \$1200 of the annual cutoff for free or reduced meals. Error prone applications are recorded automatically when using <u>Lunch – Free/Reduced – Determine Free or Reduced Status</u>.

- 1. Select <u>Lunch—Reports—Error Prone 3% of Free/Reduced Accounts.</u>
- 2. Click **Preview** to preview the report in the window at the bottom of the page.
- 3. Click **Print** to print the report.

### Lunch—Reports—Print Barcodes

This selection is used to print barcodes for use at the point of sale.

Barcodes are printed in a label format and can be attached to a card for students to carry. At the point of sale students present the employee with their card containing the barcode. The employee uses a barcode scanner (purchased by a third party company) to scan the student's barcode. This will identify that student in the Point of Sale (POS) program.

*Note:* Before you will be able to print barcodes using this report option, the CarolinaBar-B39-25HO font must be installed on your computer. This font may be downloaded from JMC's website by selecting the Download JMC Documentation link and scrolling to the bottom of the page download. Then select the barcode font that is appropriate for your operating system. After this has been downloaded, install the font into your font folder if necessary.

1. Select Lunch—Reports—Print Barcodes. The page will appear similar to Figure 34.

Select:	
O By Sequential	
By Random	
By Grade	
O By Advisor	Figure
Grade:	0
From: 0 <b>v</b> To: 12 <b>v</b>	
	Print 1
Barcode ID Field: Student #	
🗹 Print School Name 🗹 Print Barcode ID below Barcode	select
	criteri
Font Size: 8 T	
Starting Label Column: 1 V Row: 1 V	
Reminder: Before printing the barcodes PDF, make sure you use actual size (e.g., Page Scaling: None, Size: Actual) so the barcodes format correctly.	
barcous format correctly.	
Print	

e 34:

Barcodes tion а

- 2. Select the students whose barcodes you want printed by selecting **By Sequential**, **By** Random, By Grade, or By Advisor and then completing your student selection appropriately.
- 3. Specify the barcode ID Field in the Barcode ID menu. Typically this is the Student #.
- 4. Check the appropriate boxes if you want the school name or Barcode ID printed with the barcode for each student.
- 5. Specify the Font Size.
- 6. Specify the **Starting Label** column and row.
- 7. Click **Print** to print the barcodes

### Lunch—Reports—hawk-I Insurance Requests (Iowa only)

This selection is used to generate a list of families that are eligible for enrollment in hawk-I health and dental coverage. All families with students designated as free or reduced lunch status are considered eligible for this program; however, families that have declined information about this coverage will be excluded from the list.

If a family wishes to decline enrollment information for the hawk-I insurance program, a lunch status record to this effect can be entered on the family's account using the **New** button on <u>Lunch – Data – Edit Family Lunch Data</u> and specifying record type "Hawki Insurance Declined". See Figure 10B earlier in this document.

To upload the file for parents interested in hawk-i health and dental coverage:

- 1. Go to http://hawk-i.org/schools/ and download the spreadsheet as instructed.
- 2. Select Lunch-Reports-Hawki Insurance Requests.
- 3. Click on the **Create File** button.
- 4. Open the file in a text editor.
- 5. Select all of the data in the file.
- 6. Copy the selected data.
- 7. Open the spreadsheet you downloaded from the hawk-i website.
- 8. Click in cell A2.
- 9. Paste the data into the spreadsheet.
- 10. Finish filling out the spreadsheet and submit the file as instructed on the hawk-i website.

### Lunch—Integration—PaySchools - Configuration

This selection is used to configure your lunch module to work with a third-party vendor PaySchools for allowing lunch deposits with credit cards.

For more information about using PaySchools with JMC Next Gen please contact JMC at 800-524-8182.

- 1. Select <u>Lunch-Integration-PaySchools-Configuration</u>.
- 2. Enter information as directed by JMC personnel.
- 3. Click **Save Changes** to save any configuration data you entered.

### Lunch—Integration—RevTrak – Export Accounts

This selection is used to export accounts for upload to RevTrak, which is a third-party vendor that accepts credit card payments for deposits into JMC lunch accounts.

For more information about using RevTrak with JMC Next Gen please contact JMC at 800-524-8182.

1. Select <u>Lunch-Integration-RevTrak – Export Accounts</u>.

2. Click **Export Data** to export the file for later upload to RevTrak.

### Lunch—Integration—RevTrak – Import Deposits

This selection is used to import deposits from RevTrak, which is a third-party vendor that accepts credit card payments for deposits into JMC lunch accounts.

For more information about using RevTrak with JMC Next Gen please contact JMC at 800-524-8182.

- 1. Select <u>Lunch-Integration-RevTrak Import Deposits</u>.
- 2. Click **Choose File** and then navigate to select the RevTrak deposit file. This file must have already been downloaded from RevTrak prior to attempting this import.
- 3. Click **Start Import** to import the lunch deposits.

#### Lunch—Integration—rSchoolToday – Export Accounts

This selection is used to export accounts for upload to rSchoolToday, which is a thirdparty vendor that accepts credit card payments for deposits into JMC lunch accounts.

For more information about using rSchoolToday with JMC Next Gen please contact JMC at 800-524-8182.

- 1. Select <u>Lunch-Integration-rSchoolToday Export Accounts</u>.
- 2. Click one of the **Export Data... options** to export the file for later upload to rSchoolToday.

### Lunch—Integration— rSchoolToday – Import Deposits

This selection is used to import deposits from rSchoolToday, which is a third-party vendor that accepts credit card payments for deposits into JMC lunch accounts.

For more information about using rSchoolToday with JMC Next Gen please contact JMC at 800-524-8182.

- 1. Select <u>Lunch-Integration- rSchoolToday Import Deposits</u>.
- 2. Click **Choose File** and then navigate to select the rSchoolToday deposit file. This file must have already been downloaded from rSchoolToday prior to attempting this import.
- 3. Click **Start Import** to import the lunch deposits.

### Lunch—Integration— InTouchReceipting – Import Deposits

This selection is used to import deposits from InTouchReceipting, which is a third-party vendor that accepts credit card payments for deposits into JMC lunch accounts.

For more information about using InTouchReceipting with JMC Next Gen please contact JMC at 800-524-8182.

- 1. Select <u>Lunch-Integration- InTouchReceipting Import Deposits</u>.
- 2. Click **Choose File** and then navigate to select the InTouchReceipting deposit file. This file must have already been downloaded from InTouchReceipting prior to attempting this import.
- 3. Click **Start Import** to import the lunch deposits.

### Starting the JMC Point of Sale Application

- 1. Start up the JMC Point of Sale (POS) Application by double clicking on it icon or by using some other appropriate step (Start Menu, Apple Menu, etc.).
- 2. Log in with the user name and password assigned in the JMC Office Application software.

	UMC.	Phone: 1.800.524.8182 Tech Support: techsupport@jmcinc.com
Dock icon		
	Point of Sale	
	JMC Demo School	
	Thursday, September 7, 2017	
	Change Date 10:44:58 AM	
	<b>Begin Breakfast</b>	
	<b>Begin Lunch</b>	

Figure 35: Web POS Application Main Page – Initial State.

3. Verify that the computer date and time are correct

*Warning:* It is very important to verify the date on the main screen of the JMC POS Application before processing any transactions. This should be done every time the POS Application is started up. If the date is wrong you may need to quit the POS Application and change the date in the Date and Time control panels/settings for the POS computer.

4. Verify the Preferences for the POS before you begin processing lunch transactions. To see the Preferences option in the menu you will most likely need to click on the **Dock** icon in the top left corner as shown in Figure 35. Clicking on the dock will open or close the menu in the upper left corner. After clicking the Dock the Web POS page will appear similar to Figure 36.

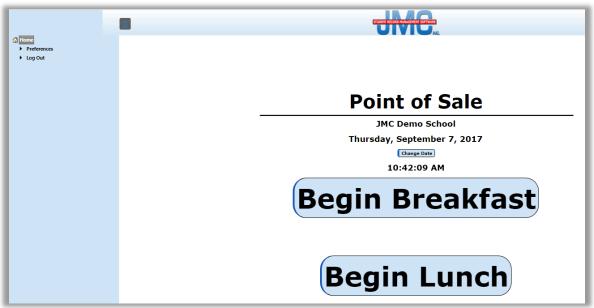


Figure 36: Web POS with Dock Expanded.

The Preferences option is in the upper left corner of the Web POS home page. The page will appear similar to Figure 37.

8		STUDENT RECO	RD MANAGEM	ENT SOFTWI	ARE NG.		
	Point of sale prefe	erences:					
			/ Lun		, Ex Mik	Alacarte	
			7	8	9		
		Windows Keyboard	4	5	6	Cash	
			1	2	3	Enter	
			0				
			Delete Clear	= Lunch	/ Ex Mik	Lunch/ Ex Mik	
			7		9	Alacarte	
		O Macintosh Keyboard	4		6	Cash	
			1		3	Enter	
			٥				
		Always Show Account Bal	ances				I
		Low Balance Limit: 0.00	Save				ļ
		Lookup Field: Student #		7			I
		Enable Sounds					

Figure 37: Preferences screen for Web POS

**Choose Correct Keyboard** This option allows for any combination of keyboard/computer, such as a Windows keyboard on a Macintosh computer or vice versa.

**Always Show Account Balances** This option governs whether account balances are shown on the POS breakfast and lunch transaction processing screens.

**Low Balance Limit** This option governs the account balance limit for the audible and visual warning when a student's transactions will bring them below the specified amount during a POS breakfast or lunch transaction.

**Lookup Field** This option governs the student ID field that is used by this POS application for the students' lunch ID. Options vary, depending upon the state that this school is located. This option takes place of special or custom versions of the POS application that were set up to use various IDs as the lunch ID.

**Enable Sounds** This option controls whether sounds are emitted at the POS when certain warnings pop up on the screen, such as a low balance indicator.

5. Click on the **Dock** to view the menu options (see Figure 38), then click on the **Home** option to return to the Home Page of the Web POS. The page will appear similar to Figure 36.

	8		STUDENT REC	ORD MANAGE				
🕼 Home		Point of sale prefe	erences:					_
Preferences     Log Out				Lu	/ nch	Ex Mik	Alacarte	
				7			, Cash	
			Windows Keyboard	4				
				1		3	Enter	
					•			
				Delete Clear	Lunch	Éx Mik	Lunch/ Ex Mik	
				7			Alacarte	
			Macintosh Keyboard	4		6	* Cash	
				1			Enter	
					•			
			Always Show Account Ba	lances				]
			Low Balance Limit: 0.00	Save	)			]
			Lookup Field: Student #		V			]
			Enable Sounds					]

Figure 38: Preferences screen for Web POS

6. Click on the **Begin Breakfast** or **Begin Lunch** button to begin processing transactions.

# **Documentation for JMC POS Application**

### Web Version

### POS—Begin Breakfast Button

This button is used to begin processing transactions for breakfast.

1. Click **Begin Breakfast**. The page will appear similar to Figure 39.



Figure 39: Point of Sale screen for processing breakfast transactions.

**Auto Mode** This option, located in the upper-left corner of the screen, can streamline the checkout process for breakfast or lunch purchases. When this option is checked a student can be charged for a breakfast or lunch by simply selecting the student and then clicking Enter.

- 2. Process a transaction.
  - a. Identify the customer.
    - i. Student with account xxx
      - Enter their JMC student number on the keyboard (could also use mouse or up/down arrow keys to select a student from the list in the upper right corner of the screen)
      - The student's name will be highlighted in the list
    - ii. Adult with account xxx
      - Enter their JMC student number on the keyboard
      - The student's name will be highlighted in the list
    - iii. Guest (cash) student choose Cash Student in Find Box
    - iv. Guest (cash) adult choose Cash Adult in Find Box
  - b. Identify the type of purchase.
    - i. If a lunch/breakfast, press =

- ii. If an alternate lunch, press  $\sim$
- iii. If an extra milk, press /
- iv. If a lunch/breakfast with an extra milk, press \*
- v. If an a la carte item, press -, and then:
  - Enter the number of the a la carte item from the list on the left.
  - Repeat step v. for additional a la carte items.
- c. Identify the payment type.
  - i. Deduct from account.
    - Press Enter.
  - ii. Pay cash for purchase.
    - Press +
    - The amount that the student owes is displayed.
    - Collect that amount from the student.
    - Press Enter.
  - iii. Deduct from account and make simultaneous deposit to account.
    - Press +
    - The amount that the student owes is displayed.
    - Enter the amount that the student is paying.
    - Press Enter.

The following are examples of breakfast transactions and the keystrokes needed to process the transactions.

**Example 1**: Student 321 purchases a lunch/breakfast.

Press the following keys:  $3 \ 2 \ 1 =$  Enter

**Example 2**: Student 321 purchases a lunch/breakfast with an extra milk.

Press the following keys: 3 2 1 \* Enter

**Example 3**: Student 321 purchases a lunch/breakfast with an extra milk and a la carte item #3.

Press the following keys: 3 2 1 \* - 3 Enter

**Example 4**: Student 321 purchases a lunch/breakfast and also deposits \$20 to their account.

Press the following keys:  $3 \ 2 \ 1 = + 2 \ 0$  Enter

- 4. To clear the Purchases window of all pending purchases, press the Delete Clear key.
- 5. To Delete a Transaction, click **Delete Transactions.** The screen will appear similar to Figure 40. Then select the transaction you wish to delete and click **Delete**. Repeat this as many times as needed, then click the **Dock** in the upper left corner and then select Home to return to the home page of the Web POS Application.

Trans	action Date:	9/7/2017 🛗			
	Deleted	Student	Time	Transaction	Amount
Dele	e 🗌	Bill Smith	10:28:00	Eggs	\$ -0.25
Dele	e 🗌	Bill Smith	10:28:00	Student Breakfast	
Dele	e 🔍	Judy Bernandone	10:28:00	Student Breakfast Extra Milk	\$ -0.30
Dele	e 🗌	Judy Bernandone	10:28:00	Student Breakfast Extra Milk	\$ -0.30
Und	lete 🗹	Judy Bernandone	10:28:00	Student Breakfast Extra Milk	\$ -0.30
Dele	e 🗌	Tim Waukon	10:28:00	Toast (2)	\$ -0.30
Dele	e 🗌	Tim Waukon	10:28:00	Student Breakfast Extra Milk	\$ -0.30
Dele		Esther Estherville	10:27:00	Student Breakfast Extra Milk	\$ -0.30
Dele	e	Esther Estherville	10:27:00	Student Breakfast	
Dele		Francis Bernadone	10:27:00	Student Breakfast Extra Milk	\$ -0.30
Dele	e 📃	Francis Bernadone	10:27:00	Student Breakfast	

Figure 40: Delete a Transaction screen.

- 5. Continue to process transactions until the serving period has concluded.
- 6. When the serving period has concluded, click the **Dock** and then select the Home Page option to return to the home page of the Web POS Application. Each transaction has been submitted immediately to the office as they were entered.

### **POS—Begin Lunch Button**

This button is used to begin processing transactions for lunch.

1. Click **Begin Lunch**. The screens and procedures are essentially the same as for breakfast. See Figures 35-40 in previous breakfast section.

## **Documentation for JMC POS Application**

### **Macintosh OS Version**

### **POS—File—Reprocess Transactions**

This selection is used to reprocess the transaction file for the specified date. This option would be used in the event of a network failure during the serving time for a meal. Normally the lunch transactions are submitted when the user exits the JMC POS Application screen for processing transactions.

Reprocess Transactions	
Transaction files exist for the following dates. Please select a file to reprocess:	
10/01/2014	Figure 41: Reprocess Transactions screen for JMC POS Application.
Cancel Reprocess	

- 1. Select File-Reprocess Transactions.
- 2. Click on the transaction file to be reprocessed to select it.
- 3. Click **Reprocess** to continue OR click **Cancel** to return to the main screen of the JMC POS Application without reprocessing a transaction file.

### **POS—Begin Breakfast Button**

This button is used to begin processing transactions for breakfast.

1. Click Begin Breakfast.

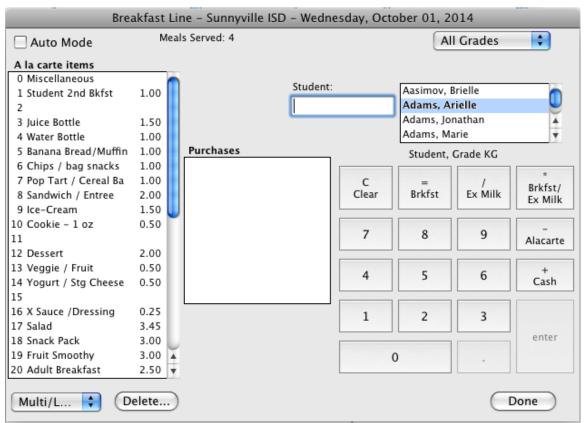


Figure 42: Point of Sale screen for processing breakfast transactions.

**Auto Mode** This option, located in the upper-left corner of the screen, can streamline the checkout process for breakfast or lunch purchases. When this option is checked a student can be charged for a breakfast or lunch by simply selecting the student and then clicking Enter.

**Multi/Live or Single/Cached** This option, located in the lower-left corner of the screen, governs how the JMC POS application interacts with the Next Gen database. *The typical setting is* **Multi/Live**, whereby information is shared between all JMC POS applications with regard to lunch balances and whether a student has already purchased a breakfast and/or lunch on a given day. *If this menu is set to* **Single/Cached**, then the JMC POS application will only know about breakfast and/or lunch purchases made with that particular JMC POS application/location. Typically the only reason the JMC POS application is set to **Single/Cached** is if there is a network speed issue AND only one POS application is in use in the lunch room.

- 2. If necessary, select a pricing group from the menu in the upper right corner of the screen.
- 3. Process a transaction.
  - a. Identify the customer.
    - i. Student with account xxx
      - Enter their JMC student number on the keyboard (could also use mouse or up/down arrow keys to select a student

from the list in the upper right corner of the screen)

- The student's name will be highlighted in the list
- ii. Adult with account xxx
  - Enter their JMC student number on the keyboard
  - The student's name will be highlighted in the list
- iii. Guest (cash) student 00
- iv. Guest (cash) adult 0
- b. Identify the type of purchase.
  - i. If a lunch/breakfast, press =
  - ii. If an alternate lunch, press  $\sim$
  - iii. If an extra milk, press /
  - iv. If a lunch/breakfast with an extra milk, press \*
  - v. If an a la carte item, press -, and then:
    - Enter the number of the a la carte item from the list on the left.
    - Repeat step v. for additional a la carte items.
- c. Identify the payment type.
  - i. Deduct from account.
    - Press Enter.
  - ii. Pay cash for purchase.
    - Press +
    - The amount that the student owes is displayed.
    - Collect that amount from the student.
    - Press Enter.
  - iii. Deduct from account and make simultaneous deposit to account.
    - Press +
    - The amount that the student owes is displayed.
    - Enter the amount that the student is paying.
    - Press Enter.

The following are examples of breakfast transactions and the keystrokes needed to process the transactions.

**Example 1**: Student 321 purchases a lunch/breakfast.

Press the following keys:  $3 \ 2 \ 1 =$  Enter

**Example 2**: Student 321 purchases a lunch/breakfast with an extra milk.

Press the following keys: 3 2 1 \* Enter

**Example 3**: Student 321 purchases a lunch/breakfast with an extra milk and a la carte item #3.

Press the following keys: 3 2 1 \* - 3 Enter

**Example 4**: Student 321 purchases a lunch/breakfast and also deposits \$20 to their account.

Press the following keys:  $3 \ 2 \ 1 = + 2 \ 0$  Enter

- 4. To clear the Purchases window of all pending purchases, press the Clear key.
- 5. To Delete a Transaction, click **Delete a Transaction...** The screen will appear similar to Figure 43. Then select the transaction you wish to delete and click **Delete**. Repeat this as many times as needed, then click **Done** to return to the main screen of the JMC POS Application.

	Delete A Transaction								
Se	Select a transaction to delete:								
	Time	ID	Name	Purchases Amount					
Г	11:32:04	747	Aasimov, Brielle	Student Breakfast					
	11:32:05	747	Aasimov, Brielle	Student Extra Milk \$-0.45					
	11:32:13	1311	Adams, Arielle	Student Breakfast					
	11:32:15	1311	Adams, Arielle	Student Extra Milk \$-0.45					
	11:32:26	505	Adams, Jonathan	Banana Bread/Muffin \$-1.00					
	11:32:30	505	Adams, Jonathan	Student Extra Milk \$-0.45					
	11:32:37	20	Adams, Marie	Student Breakfast					
	11:32:41	19	Adams, Susan	Student Breakfast					
	<u> </u>								
	P	rint		Delete Done					

Figure 43: Delete a Transaction screen.

- 5. Continue to process transactions until the serving period has concluded.
- 6. When the serving period has concluded, click **Done** to return to the main screen of the JMC POS Application. At this point all transactions for the meal just served will be transmitted to the JMC Data folder on the network server. Prior to this all transactions have been saved on a file on the local hard drive of the POS computer.

*Note:* In the event of a loss of network service, the transaction file can be reprocessed at a later time when network services have been restored. See <u>POS-File-Reprocess Transactions</u> for details on this procedure.

### **POS—Begin Lunch Button**

This button is used to begin processing transactions for lunch.

1. Click **Begin Lunch**. The screens and procedures are essentially the same as for breakfast. See Figure 42.

# Documentation for JMC POS Application Windows Version

### **POS—File—Reprocess Transactions**

This selection is used to reprocess the transaction file for the specified date. This option would be used in the event of a network failure during the serving time for a meal. Normally the lunch transactions are submitted when the user exits the JMC POS Application screen for processing transactions.

Reprocess Transactions Transaction files exist for the following dates.	
Please select a file to reprocess: 09/30/2014 08/22/2014 08/20/2014	Figure 45: Reprocess Transactions screen for JMC POS Application.
Cancel Reprocess	

- 1. Select <u>File-Reprocess Transactions</u>.
- 2. Click on the transaction file to be reprocessed to select it.
- 3. Click **Reprocess** to continue OR click **Cancel** to return to the main screen of the JMC POS Application without reprocessing a transaction file.

### **POS—Begin Breakfast Button**

This button is used to begin processing transactions for breakfast.

1. Click Begin Breakfast.

Breakfast Line - Sunnyville	ISD - Tuesday, September 30, 2014				
🗖 Auto Mode	Meals Served: 0		4	All Grades	▼
A la carte items 0 Miscellaneous 1 Student 2nd Bkfst 2 3 Juice Bottle 4 Water Bottle 5 Banana Bread/Muffin	1.00 1.50 1.00 1.00 Purchases	Student:  I	Cash Stud	t Gr KD-KD	
6 Chips / bag snacks	1.00 E 1.00			×	
7 Pop Tart / Cereal Ba 8 Sandwich / Entree	2.00		Brkfst	Ex Milk	Alacarte
9 Ice-Cream 10 Cookie - 1 oz 11	1.50 0.50	Delete 7 Clear	8	9	+
12 Dessert 13 Veggie / Fruit 14 Yogurt / Stg Cheese	2.00 0.50 0.50	4	5	6	Cash
15 16 X Sauce /Dressing 17 Salad	0.25 3.45	1	2	3	
18 Snack Pack 19 Fruit Smoothy 20 Adult Breakfast	3.00 3.00 2.50 -		0		Enter
Multi/Live  Del	lete			Dor	ie

Figure 46: Point of Sale screen for processing breakfast transactions.

**Auto Mode** This option, located in the upper-left corner of the screen, can streamline the checkout process for breakfast or lunch purchases. When this option is checked a student can be charged for a breakfast or lunch by simply selecting the student and then clicking Enter.

**Multi/Live or Single/Cached** This option, located in the lower-left corner of the screen, governs how the JMC POS application interacts with the Next Gen database. *The typical setting is Multi/Live*, whereby information is shared between all JMC POS applications with regard to lunch balances and whether a student has already purchased a breakfast and/or lunch on a given day. *If this menu is set to Single/Cached*, then the JMC POS application will only know about breakfast and/or lunch purchases made with that particular JMC POS application/location. Typically the only reason the JMC POS application is set to Single/Cached is if there is a network speed issue AND only one POS application is in use in the lunch room.

- 2. If necessary, select a pricing group from the menu in the upper right corner of the screen.
- 3. Process a transaction.
  - a. Identify the customer.
    - i. Student with account xxx
      - Enter their JMC student number on the keyboard (could also use mouse or up/down arrow keys to select a student from the list in the upper right corner of the screen)

- The student's name will be highlighted in the list
- ii. Adult with account xxx
  - Enter their JMC student number on the keyboard
  - The student's name will be highlighted in the list
- iii. Guest (cash) student 00
- iv. Guest (cash) adult 0
- b. Identify the type of purchase.
  - i. If a lunch/breakfast, press /
  - ii. If an alternate lunch, press  $\sim$
  - iii. If an extra milk, press \*
  - iv. If an a la carte item, press -, and then:
    - Enter the number of the a la carte item from the list on the left.
    - Repeat step iv. for additional a la carte items.
- c. Identify the payment type.
  - i. Deduct from account.
    - Press Enter.
  - ii. Pay cash for purchase.
    - Press +
    - The amount that the student owes is displayed.
    - Collect that amount from the student.
    - Press Enter.
  - iii. Deduct from account and make simultaneous deposit to account.
    - Press +
    - The amount that the student owes is displayed.
    - Enter the amount that the student is paying.
    - Press Enter.

The following are examples of breakfast transactions and the keystrokes needed to process the transactions.

**Example 1**: Student 321 purchases a lunch/breakfast.

Press the following keys: 3 2 1 / Enter

**Example 2**: Student 321 purchases a lunch/breakfast with an extra milk.

Press the following keys: 3 2 1 /\* Enter

**Example 3**: Student 321 purchases a lunch/breakfast with an extra milk and a la carte item #3.

Press the following keys: 3 2 1 /\* - 3 Enter

**Example 4**: Student 321 purchases a lunch/breakfast and also deposits \$20 to their account.

Press the following keys:  $3 \ 2 \ 1 \ / \ + \ 2 \ 0$  Enter

- 4. To clear the Purchases window of all pending purchases, press the Delete/Clear key.
- 5. To Delete a Transaction, click **Delete a Transaction...** The screen will appear similar to Figure 47. Then select the transaction you wish to delete and click **Delete**. Repeat this as many times as needed, then click **Done** to return to the main screen of the JMC POS Application.

Del	Time	ID	Name	Purchases	Ar	nount	
	03:50:54	505	Adams, Jonathan	Student Breakfast			
	03:50:56	505	Adams, Jonathan	Student Extra Milk	S	-0.45	
	03:51:10	20	Adams, Marie	Student Breakfast			
	03:51:19	20	Adams, Marie	Pop Tart / Cereal Ba	S	-1.00	
	03:51:36	19	Adams, Susan	Banana Bread/Muffin	S	-1.00	
	03:51:45	19	Adams, Susan	Student Extra Milk	S	-0.45	
			Print	Delete	CC	ne	

Figure 47: Delete a Transaction screen.

- 6. Continue to process transactions until the serving period has concluded.
- 7. When the serving period has concluded, click **Done** to return to the main screen of the JMC POS Application. At this point all transactions for the meal just served will be transmitted to the JMC Data folder on the network server. Prior to this all transactions have been saved on a file on the local hard drive of the POS computer.

*Note:* In the event of a loss of network service, the transaction file can be reprocessed at a later time when network services have been restored. See <u>POS-File-Reprocess Transactions</u> for details on this procedure.

### **POS—Begin Lunch Button**

This button is used to begin processing transactions for lunch.

1. Click **Begin Lunch**. The screens and procedures are essentially the same as for breakfast. See Figure 46.

### Appendix A

### Using Credit Cards for Lunch Account Deposits

JMC has working relationships with multiple vendors for accepting credit card payments for family lunch accounts. Please contact JMC technical support at 800-524-8182 or <a href="mailto:support@jmcinc.com">support@jmcinc.com</a> for further details.

### **Appendix B**

### Setting Up Alternative Reimbursable Meals

A new feature of the JMC lunch module is the option of having more than one reimbursable meal for your school. For example, if your school offers two different meal choices for lunch and both choices qualify for state and/or federal reimbursement, then you could define the alternative (second) reimbursable meal and charge students for that alternative reimbursable meal using the POS application as outlined in this appendix.

To define the alternative reimbursable meal you would select <u>Lunch-Data Setup-Edit</u> <u>Meal Prices</u> in the Next Gen Office Application (you must have Build 020615 or later in order to use this new feature). The page would appear similar to Figure B1.

Edit Free Breakfast       Free Breakfast       0.00       0.0000       1.6200         Edit Student Extra Milk       Student Extra Milk       0.45       0.0000       0.0000         Edit Adult Eraakfast       Adult Extra Milk       0.45       0.0000       0.0000         Edit Adult Extra Milk       Adult Extra Milk       0.45       0.0000       0.0000         Edit Aduernative Student Breakfast 1       Alternative Student Breakfast 1       0.00       0.0000       1.6200         Edit Alternative Reduced Breakfast 1       Alternative Free Breakfast 1       0.00       0.0000       1.6200         Edit Alternative Reduced Breakfast 2       Alternative Free Breakfast 2       0.00       0.0000       1.6200         Edit Alternative Reduced Breakfast 2       Alternative Student Breakfast 2       0.00       0.0000       1.6200         Edit Alternative Reduced Breakfast 2       Alternative Reduced Breakfast 2       0.00       0.0000       1.6200         Edit Alternative Reduced Lunch       2.20       0.1250       0.3000       1.6200         Edit Student Lunch       2.20       0.1250       0.3400       0.0000         Edit Reduced Lunch       Reduced Lunch       0.00       0.0250       2.6400       0.01250         Edit Alternative Reduced Lunch <td< th=""><th>Sunnyville ISD</th><th colspan="6">ille ISD Day: 177 - 05/21/2015 - Thursday</th></td<>	Sunnyville ISD	ille ISD Day: 177 - 05/21/2015 - Thursday								
Meal Name       Description       Individual       State       Federal         Edit       Student Breakfast       Reduced Breakfast       0.00       0.3000       1.3200         Edit       Reduced Breakfast       Reduced Breakfast       0.00       0.0000       1.6200         Edit       Student Extra Milk       Student Extra Milk       0.45       0.0000       0.0000         Edit       Adult Breakfast       2.50       0.0000       0.0000       0.0000         Edit       Adult Breakfast       2.50       0.0000       0.0000       0.0000         Edit       Adult Breakfast       1.41ernative Student Breakfast       2.50       0.0000       0.0000         Edit       Alternative Reduced Breakfast       1.41ernative Reduced Breakfast       0.05500       0.2800         Edit       Alternative Reduced Breakfast       1.000       0.0000       1.5200         Edit       Alternative Reduced Breakfast       2       0.00       0.3000       1.5200         Edit       Alternative Reduced Breakfast       2       0.00       0.5000       0.5200         Edit       Alternative Reduced Breakfast       2       0.00       0.5000       1.5200         Edit       Alternative Reduced Lunch	Price Groups: Grades 1 to 12 💌 Print									
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Edit         Free Lunch         0.00         0.1250         3.0400           Edit         Student Extra Milk         0.45         0.0000         0.0000           Edit         Adult Lunch         Adult Lunch         3.45         0.0000         0.0000           Edit         Adult Extra Milk         0.45         0.0000         0.0000           Edit         Adult Extra Milk         0.45         0.0000         0.0000           Edit         Adult Extra Milk         0.45         0.0000         0.0000           Edit         Alternative Student Lunch 1         3.00         0.1250         0.3400           Edit         Alternative Reduced Lunch 1         0.80         0.5250         2.6400           Edit         Alternative Free Lunch 1         0.00         0.1250         3.0400           Edit         Alternative Student Lunch 2         4.00         0.1250         0.3400           Edit         Alternative Student Lunch 2         4.00         0.1250         0.3400           Edit         Alternative Reduced Lunch 2         1.80         0.5250         2.6400	Edit Student Lunch	Student Lunch	2.20	0.1250	0.3400					
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Edit         Adult Lunch         3.45         0.0000         0.0000           Edit         Adult Extra Milk         Adult Extra Milk         0.45         0.0000         0.0000           Edit         Adult Extra Milk         Adult Extra Milk         0.45         0.0000         0.0000           Edit         Alternative Student Lunch 1         3.00         0.1250         0.3400           Edit         Alternative Reduced Lunch 1         0.80         0.5250         2.6400           Edit         Alternative Free Lunch 1         Alternative Free Lunch 1         0.00         0.1250         0.3400           Edit         Alternative Student Lunch 2         Alternative Alternative Free Lunch 1         0.00         0.1250         0.3400           Edit         Alternative Reduced Lunch 2         Alternative Reduced Lunch 2         0.5250         2.6400	Edit Free Lunch	Free Lunch	0.00	0.1250	3.0400					
Edit         Adult Extra Milk         Adult Extra Milk         0.45         0.0000         0.0000           Edit         Alternative Student Lunch 1         3.00         0.1250         0.3400           Edit         Alternative Reduced Lunch 1         0.80         0.5250         2.6400           Edit         Alternative Reduced Lunch 1         0.000         0.1250         3.0400           Edit         Alternative Free Lunch 1         0.000         0.1250         3.0400           Edit         Alternative Student Lunch 2         Alternative Student Lunch 2         0.000         0.1250           Edit         Alternative Reduced Lunch 1         0.00         0.1250         3.0400           Edit         Alternative Reduced Lunch 2         1.80         0.5250         2.6400	Edit Student Extra Milk	Student Extra Milk	0.45	0.0000	0.0000					
Edit         Alternative Student Lunch 1         3.00         0.1250         0.3400           Edit         Alternative Reduced Lunch 1         0.80         0.5250         2.6400           Edit         Alternative Reduced Lunch 1         0.00         0.1250         3.0400           Edit         Alternative Free Lunch 1         0.00         0.1250         3.0400           Edit         Alternative Student Lunch 2         Alternative Reduced Lunch 2         0.00         0.1250         0.3400           Edit         Alternative Reduced Lunch 2         Alternative Reduced Lunch 2         0.00         0.1250         0.3400           Edit         Alternative Reduced Lunch 2         1.80         0.5250         2.6400										
Edit         Alternative Reduced Lunch 1         0.80         0.5250         2.6400           Edit         Alternative Free Lunch 1         Alternative Free Lunch 1         0.00         0.1250         3.0400           Edit         Alternative Student Lunch 2         Alternative Student Lunch 2         4.00         0.1250         0.3400           Edit         Alternative Reduced Lunch 2         Alternative Reduced Lunch 2         1.80         0.5250         2.6400			0.45	0.0000	0.0000					
Edit         Alternative Free Lunch 1         0.00         0.1250         3.0400           Edit         Alternative Student Lunch 2         4.00         0.1250         0.3400           Edit         Alternative Student Lunch 2         4.00         0.1250         0.3400           Edit         Alternative Reduced Lunch 2         1.80         0.5250         2.6400	Edit Alternative Student Lunch 1	Alternative Student Lunch 1	3.00	0.1250	0.3400					
Edit         Alternative         Student         Lunch         2         4.00         0.1250         0.3400           Edit         Alternative         Reduced         Lunch         2         1.80         0.5250         2.6400	Edit Alternative Reduced Lunch 1	Alternative Reduced Lunch 1	0.80	0.5250	2.6400					
Edit Alternative Reduced Lunch 2 Alternative Reduced Lunch 2 1.80 0.5250 2.6400			0.00	0.1250	3.0400					
			4.00	0.1250	0.3400					
Edit Alternative Free Lunch 2 0.00 0.1250 3.0400			1.80	0.5250	2.6400					
*	Edit Alternative Free Lunch 2	Alternative Free Lunch 2	0.00	0.1250	3.0400					
-										
						-				

igure B1

Editing Meal Prices page

By default the meal would have a generic name such as Alternative Student Lunch 1, Alternative Reduced Lunch 1, etc. Also by default the amounts for Individual (what the student gets charged), State (what the state government will reimburse), and Federal (what the Federal government will reimburse) are all \$0.000.

To edit the name and/or amounts for a meal, click on the Edit link at the left of that row for the meal you wish to edit and then enter the new information for that row. Once you have completed your edits then click the Update link at the left of that row to save the changes. See Figure B2 for an example.

Sunnyvil	le ISD	Day: 177 -	05/21/2015	- Thursda	y	2014-
rice Gro	oups: Grades 1 to 12 💌	Print				
reakfas	t - Grades 1 to 12					*
	Name	Description	1	ndividual	State Federal	
	ent Breakfast	Student Breakfast	1	.10	0.5500 0.2800	
dit Redu	ced Breakfast	Reduced Breakfast	C	0.00	0.3000 1.3200	
Edit Free	Breakfast	Free Breakfast	C	0.00	0.0000 1.6200	
dit Stude	ent Extra Milk	Student Extra Milk	C	.45	0.0000 0.0000	
dit Adult	Breakfast	Adult Breakfast	2	2.50	0.0000 0.0000	
dit Adult	Extra Milk	Adult Extra Milk	C	.45	0.0000 0.0000	
dit Alterr	native Student Breakfast 1	Alternative Student Brea	kfast 1 2	2.00	0.5500 0.2800	
Edit Alterr	native Reduced Breakfast 1	Alternative Reduced Brea	akfast 1 🛛 0	.90	0.3000 1.3200	
dit Alterr	native Free Breakfast 1	Alternative Free Breakfa	st 1 0	.00	0.0000 1.6200	
Edit Alterr	native Student Breakfast 2	Alternative Student Brea	kfast 2 3	8.00	0.5500 0.2800	
		Alternative Reduced Brea	akfact 2 0	.00	0.3000 1.3200	
Edit Alterr	native Reduced Breakfast 2	Alternative Reduced Brea	akidaliz u			
	native Reduced Breakfast 2 native Free Breakfast 2	Alternative Reduced Breakfa		).00	0.0000 1.6200	Ŧ
Edit Alterr	native Free Breakfast 2 Grades 1 to 12	Alternative Free Breakfa	st 2 C	0.00		~
idit Alterr	native Free Breakfast 2	Alternative Free Breakfa			0.0000 1.6200 Federal	*
unch - G	native Free Breakfast 2 Grades 1 to 12	Alternative Free Breakfa	st 2 C	0.00		*
unch - G	native Free Breakfast 2 Grades 1 to 12 Meal Name	Alternative Free Breakfa Description Student	st 2 C	State	Federal	*
Edit Altern Lunch - G Edit	native Free Breakfast 2 Grades 1 to 12 Meal Name Student Lunch	Alternative Free Breakfa Description Student Lunch Reduced Lunch Free Lunch	n Individual 2.20	5.00 State 0.1250	<b>Federal</b> 0.3400	* *
Edit Alterr Lunch - C Edit Edit Edit	arative Free Breakfast 2 Grades 1 to 12 Meal Name Student Lunch Reduced Lunch Free Lunch Student Extra Milk	Alternative Free Breakfa Descriptio Student Lunch Reduced Lunch Free Lunch Student Extra Milk	n Individual 2.20 0.00 0.00 0.45	5.00 State 0.1250 0.5250	Federal 0.3400 2.6400	* E
Edit Alterr Lunch - C Edit Edit Edit Edit	arative Free Breakfast 2 Grades 1 to 12 Meal Name Student Lunch Reduced Lunch Free Lunch	Alternative Free Breakfa Description Student Lunch Reduced Lunch Free Lunch Student Extra Milk Adult Lunch	n Individual 2.20 0.00 0.00 0.45	State 0.1250 0.5250 0.1250	Federal 0.3400 2.6400 3.0400	*
Edit Alterr Lunch - C Edit Edit Edit Edit Edit	arative Free Breakfast 2 Grades 1 to 12 Meal Name Student Lunch Reduced Lunch Free Lunch Student Extra Milk	Alternative Free Breakfa Description Student Lunch Free Lunch Free Lunch Student Extra Milk Adult Lunch Adult Extra Milk	n Individual 2.20 0.00 0.00 0.45	State 0.1250 0.5250 0.1250 0.0000	Federal 0.3400 2.6400 3.0400 0.0000	•
edit Alterr .unch - C Edit Edit Edit Edit Edit	arades 1 to 12 Meal Name Student Lunch Reduced Lunch Free Lunch Student Extra Milk Adult Lunch	Alternative Free Breakfa  Descriptio Student Lunch Reduced Lunch Free Lunch Student Extra Milk Adult Lunch Adult Extra MilkAlternative Student	n Individual 2.20 0.00 0.45 3.45	State 0.1250 0.5250 0.1250 0.0000 0.0000	Federal 0.3400 2.6400 3.0400 0.0000 0.0000	
Edit Alterr Lunch - C Edit Edit Edit Edit Edit Edit Edit	antive Free Breakfast 2 andes 1 to 12 Meal Name Student Lunch Reduced Lunch Free Lunch Student Extra Milk Adult Lunch Adult Extra Milk	Alternative Free Breakfa  Description Student Lunch Reduced Lunch Free Lunch Student Extra Milk Adult Lunch Adult Extra Milk Adult Extra Milk Aternative Student Lunch Alternative Alterna	n Individual 2.20 0.00 0.45 3.45 0.45	State 0.1250 0.5250 0.1250 0.0000 0.0000	Federal 0.3400 2.6400 3.0400 0.0000 0.0000 0.0000	

Figure B2

Defining an alternative reimbursable meal on the Edit Meal Prices page

*Note:* Make sure that you define the alternative reimbursable meals for breakfast and lunch as well as for each pricing group as appropriate.

Once you have the alternative reimbursable meals defined you may begin charging students appropriately for these meals using the JMC POS software.

Only one reimbursable meal may be charged to the student using the  $\sim$  key in the upper left corner of the keyboard. Additional keys for alternative reimbursable meal 2 will be incorporated into future builds of the POS software.

The transaction for an alternative reimbursable meal in the POS will look similar to Figure B3 if the default name is used or Figure B4 if the Meal Name was edited. Remember, the key to press on the keyboard for this purchase is the  $\sim$  key in the upper left corner of your keyboard. This is not documented on the POS screen.

Lunch Line - Sunnyville Hig	gh School	- Wednesday, February 11, 2015		and the second s		
🗖 Auto Mode	Mea	als Served: 0		All Grades Charges No	<b>V</b>	
A la carte items 0 Miscellaneous 1 Student Second Lunch 2 Program Lunch 3 Juice Bottle 4 Water Bottle 5 Banana Bread/Muffin 6 Chips /Bag Snacks 7 Pop Tart / Cereal Bar 8 Sandwich / Entree 9 Ice-Cream 10 cookie - 1 oz 11 12 Dessert 13 Veggie / Fruit 14 Yogurt / Stg Cheese 15	2.00 0.00 1.50 1.00 1.00 2.00 0.50 0.50 0.50	Purchases Alternative Student Lunch 1	Student Delete Clear	Cash Student Gr 1-12           /         *           /         Ex Milk           7         8         9           4         5         6	Alacarte + Cash	Figure B3 Purchasing an Alternative Reimbursable Meal at the POS
16 X Sauce / Dressing 17 Salad 18 Snack Pack 19 Fruit Smoothy 20 Adult Lunch	0.25 3.45 3.00 3.00 3.45 <del>-</del>			1     2     3       0     .	Enter	
Multi/Live 🔻 De	lete			Done		
Lunch Line - Sunnyville Hig	gh School	- Wednesday, February 11, 2015		-		
Lunch Line - Sunnyville Hig		- Wednesday, February 11, 2015 Ils Served: 0		All Grades Charges No	▼ t Allowed	
	Mea		Student Delete Clear	All Grades Charges No Cash Student Gr 1-12 / Lunch Ex Milk 7 8 9 4 5 6		Figure B4 Purchasing an Alternative Reimbursable Meal at the POS when the Meal Name has been

Once you have generated lunch transactions for alternative reimbursable meals the reports in the Next Gen Lunch module will begin showing these purchases appropriately in all reports. For example, reports such as Meals Served, Summary, and Reimbursables have been updated appropriately to give the rows and columns of data you would expect.

### Appendix C

### **Direct Certification Export/Upload For Minnesota Private Schools**

MDE's Food and Nutrition Services (FNS) does not require an upload for most clients since their Direct Certification files are normally generated based on MARSS data submissions. Minnesota private schools are not required to do MARSS reporting, therefore they must complete the following steps in order to acquire their Direct Certification data from FNS using their CLiCS account:

- 1. Use JMC option Lunch Free/Reduced Direct Certification Export to create CSV file
- 2. Go to <u>http://education.state.mn.us/MDE/dse/FNS/SNP/proc/dc/</u> and download the <u>School Enrollment File Upload Template</u>
- 3. Open the <u>School Enrollment File Upload Template</u> in Excel.
- 4. In Excel, select the sample data in the <u>School Enrollment File Upload Template</u> and clear out the data (right click selected data, select Clear Contents)
- 5. In Excel, select cell A1
- In Excel, choose Data at the top of the screen, then From Text in the tool bar
   6a. Navigate to select the JMC-generated CSV file
  - 6ai. titled something like XXXX\_YYY\_SchoolEnrollment where XXXX is district number and YYY is building number
  - 6aii. most likely found in Downloads folder
  - 6b. In Excel's Text import Wizard Step 1 select Delimited
  - 6c. In Excel's Text import Wizard Step 2 select Comma (may need to also deselect Tab)
  - 6d. In Excel's Text import Wizard Step 3 use shift-click to select all columns in the Data preview, then select Text for Column data format, then click the Finish button
- 7. In Excel, save the template use Save As option to save file to Desktop so can easily find later.

The file (on Desktop) is now ready to upload to your CLiCS account. To log into your CLiCS account use the following link:

https://fns.state.mn.us/clics2/

### **Appendix D: The Details Behind Lunch Status**

### **Best Practices – Automatic Entry**

The most reliable way to work with students' free and reduced lunch status changes includes the use of these JMC processes:

- Lunch Data Setup Import Free and Reduced Status from Prior Year

   Lunch status from the prior year is valid for the first 30 days
- 2. Lunch Free/Reduced Direct Certification Import
  - a. Provided by each state for download and import
  - b. Includes the best payload of highest priority lunch status information
  - c. Details of Direct Certification reasons are automatically recorded in JMC
  - d. Can be run repeatedly throughout the year with no duplication of Direct Certification detail
    - i. Some states provide monthly updates to their Direct Certification data and each month this update can be downloaded and imported
- 3. Lunch Free/Reduced Determine Free or Reduced Status
  - a. Parallels the process where parents apply for benefits based on household income or size
  - b. Allows for lunch status update to free or reduced (if applicable) for dependents
  - c. Details of Lunch Status change are automatically recorded in JMC
  - d. Can be run at any time of year, typically when a parent or guardian applies for benefits

By using these processes correctly in JMC you should have very reliable free and reduced lunch status data including important details since this data is entered automatically via these processes. This is important in that the following reports in the JMC lunch module rely on these records and their detail:

- Lunch Status
- Benefit Issuance List

### Manual Entry of Lunch Status Changes

Many schools also make some lunch status changes via manual processes using <u>Lunch</u> – <u>Data</u> – <u>Edit Student Lunch Data</u>. Generally the reason for doing so would most likely be because the school has information such as an application for benefits from the parent or guardian or direct certification data.

JMC WI Demo High School	Day: 1 - 09/01/2017 - Friday 2017-2018
Grade: All V Find:	<· ->
Student Name: Abe Aasimov ID: 49	Grade: 0 Birth Date (Age): N/A
Lunch Status: Paying Student 🔻	Current Balance: \$ 0.00
<ul> <li>Economically Disadvantaged</li> <li>Allow Charges</li> </ul>	
Transactions Allowed Purchases	
Deposit) Refund) New)	Print Transactions Print Notice
Deleted Date User Transaction	Status Amount Balance
No records to display.	

On the Edit Student Lunch Data page, as shown above, the client looks up the student, then clicks the **New** button and they are presented with the following dialog:

Date: 9/1/2017 Type: Application Lunch Status:	n Received Paying Student V		T					
SNAP HeadStart	SNAP Letter EarlyHdStart	TANF Migrant Or Household Si	FDPIR Runaway ze	Other Homeless	ErrorProne			
Contact:	Comment	CaseNumber	:					
OK Close								

Next the user must specify the type of action, typically by selecting an option such as Determination Made – Approved for Free (because of an application for benefits), Determination Made – Approved for Reduced (because of an application for benefits), or Direct Certification – Approved for Free (because of direct certification download).

Date:	9/1/2017	
	Application Received	•
SN He	Application Received Application was Included in Verification Determination Made - Approved for Free Determination Made - Approved for Reduced Determination Made - Approved for Reduced Last Year Determination Made - Denied - Other Determination Made - Denied Due to Earnings	DPIR Other ErrorProne unaway Homeless FosterChild
Conta	Direct Certification - Approved for Free Direct Certification - Approved for Reduced Eligibility Letter Generated Eligibility Letter Sent	CaseNumber:

If one of those 3 types is selected, the user will then select the student's new lunch status from the Lunch Status drop down list. The user will then be prompted to enter the effective date for the student's lunch status change.

Date: 9/1/2017								
Type: Determina	tion Made - Approved fo	or Reduced	•					
Lunch Status: R	educed Student 🔻							
Determination Date: 9/1/2017								
SNAP	SNAP Letter			Other	ErrorProne			
HeadStart	EarlyHdStart	Migrant	🗌 Runaway	Homeless	FosterChild			
Approved Based On Income And Or Household Size								
Contact:	Comment:	CaseNumber						
OK Close								

Once both of these are specified, *the details must be included as well*. If this step is not done then the Lunch Status and Benefit Issuance List reports will not have the information necessary to list this student correctly.

For types **Determination Made – Approved for Free** and **Determination Made – Approved for Reduced**, the reason is almost always going to be **Approved Based On Income And Or Household Size**. These lunch status changes are probably being made because the user has a copy of an application from the parent or guardian, and the reason for their approval is typically because of income and/or household size. Assuming this to be the case, the user would simply click the check box for that option.

For type **Direct Certification** – **Approved for Free**, the reason is typically one of the following, as found in the Direct Certification file the user downloaded from their state department's website:

- SNAP (for Iowa this is also known as FA or Food Assistance)
- TANF (for Iowa this is also known as FIP)
- FDPIR
- Other
- HeadStart
- EarlyHeadStart
- Migrant
- Runaway
- Homeless
- FosterChild
- CaseNumber

# *In some cases, the student may have qualified for benefits based on more than one reason*, so the user must carefully check all of the details in the Direct Certification download file to make sure all details are included correctly.

For type **Direct Certification – Approved for Reduced**, which is new in JMC this year, the reason is typically **Other**.

Notice that manually entering these changes requires the user to enter the details, whereas using processes such as Direct Certification Import will take care of these automatically.

The following types of records do not allow for a status change to free or reduced but allow the user to include more details about important steps in the lunch benefit data trail.

- Application Received
- Application was Included in Verification
- Determination Made Denied Other
- Determination Made Denied Due to Earnings
- Eligibility Letter Generated
- Eligibility Letter Sent

### How the Lunch Status Report Uses This Detail

The lunch status report includes sections for each type of benefit (e.g. Free, Reduced, Pay, and Adult) and includes totals and, if appropriate, breakdowns at the end of each section. The breakdowns include expected combinations, a catch-all "No Details", and totals.

For Free benefits students, the breakdowns are as follows:

- Direct Certified SNAP
- Direct Certified TANF
- Direct Certified FDPIR
- Direct Certified Foster Status
- Direct Certified Migrant Status
- Direct Certified Runaway, Homeless, HeadStart, EarlyHeadStart
- Direct Certified Other Free
- Direct Certified SNAP Letter Method
- Direct Certified No Details
- Direct Certified Total
- Determination Made Approved for Free Categorically Eligible
- Determination Made Approved for Free Income and/or Household Size
- Determination Made Approved for Free FDPIR
- Determination Made Approved for Free No Details
- Determination Made Approved for Free Total

For Reduced benefits students, the breakdowns are as follows:

- Direct Certification Reduced Price
- Determination Made Approved for Free Income and/or Household Size
- Determination Made Approved for Free No Details
- Determination Made Approved for Free Total

Notice that in both the free and reduced breakdowns there are lines for all of the expected combinations and then there are also lines labeled "No Details". The "No Details" lines are for when there are records that do not have an expected combination of Status Reason and Details.

For example, a combination such as Direct Certified – Income and/or Household Size does not make sense because no student would be directly certified as free for that reason. If this combination were found in the student's records then he would be tallied in this report as one of the Direct Certified – No Details.

A more likely example is where the student was manually entered as Direct Certified but no details were checked at the time the record was entered and so they do not belong to any of the expected combinations and therefore end up being tallied as "No Details".

Also, the Lunch Status report includes a column called "Details" and when a student has an unexpected combination of Reason and Details then they will have a value of "N" in the Details column.

### How the Benefit Issuance List Uses This Detail

The Benefit Issuance List is a list of all students within the district that are either free or reduced status on the date specified and includes 2 columns called Description and Method. The Description column includes the Reason for their status and the Method column is drawing from the details of the student's lunch detail record. If no details were provided, or if an unexpected combination occurs, then nothing is displayed in the Method column.

	rafit, hiwance, Littlatgin								
en 🔲 😐 Bath Con	e XSD Deta :      NDE ADVISI	IR 🔲 Ne	trialika Vendor I	Le:      Netrask	a Department 🙃 E	a-Fi Data Standard [] No	Snagger 20 Final [] Sandbol	Administra 📋 Will Snegger Prov	Aut: D 58-FICDS API Docur
						STUDENT RECORD HANNES	EMENT SOFTWARE		
						UIV			
	and the second	and the second	diam'rthe						2016-2
		-							2010 2
	□ Include	Inactive	es.						
				100					
	Status Dat	tes 4/3/	2017	100					
	Preview	Print	Exnor	-					
ce	Ficinem			9					
(			cs: All						
		Date	: 4/3/20	17					
				Date of	6	Status Approval	Description		Method Included in
tendance		Grad	e Buildin	<sup>9</sup> Birth	State ID	Status Date	Description		Method Verification
		- 22	0.0.21						
cation		4	409	02/15/200			6 Direct Certification -		SNAP
Cathon	de Lynn	2	409	01/18/200 03/11/200			6 Direct Certification - 6 Direct Certification -		SNAP
	De Lynn	11	109	03/11/200			6 Direct Certification -		SNAP
	E.	2	409	09/14/200				<ul> <li>Approved for Reduced</li> </ul>	
	ew.	2	409	12/25/200				<ul> <li>Approved for Reduced</li> </ul>	
	telan	4	409	03/07/200			6 Direct Certification -		SNAP
	by .	5	409	11/23/200			7 Determination Made		
	nice Leigh	-4	409	08/09/200			6 Direct Certification -		SNAP .
duced		1	409	05/20/201			6 Direct Certification -		SNAP
tup	Ine	2	409	01/14/200			6 Direct Certification -		SNAP
tup		7	209	08/22/200			6 Direct Certification -		SNAP
1	NU C	11	109	12/16/199		F 08/23/201	6 Direct Certification -	Approved for Free	SNAP

# What if a student has more than one legitimate method checked in their lunch record detail?

This can legitimately happen, for example a student could have been Direct Certified – Approved for Free because of SNAP and TANF or various other legitimate combinations.

For these situations there is the concept of Meal Eligibility Priority, as displayed below.

- 1. Direct Certification by SNAP
- 2. Direct Certification by TANF
- 3. Direct Certification by Foster Status
- 4. Direct Certification by Migrant Status
- 5. Direct Certification by Other Free Status
- 6. Free Eligibility By Application
- 7. Direct Certification by Other Reduced Price
- 8. Reduced Price Eligibility by Application

The Lunch Status report will include the student in the tally for the breakdown of highest priority. For example, if a student was Direct Certified – Approved for Free and both SNAP and TANF were checked, the Lunch Status report would simply tally the student for Direct Certified – SNAP (the higher priority of the 2).

The Benefit Issuance List also uses the Meal Eligibility Priority and lists the Method as only the detail checked of the higher priority.