COLYAR CONSULTING GROUP, INC.

Child Nutrition Program Electronic Application and Reimbursement System (PEARS)

Summer Food Service Program

User Manual

Pennsylvania Department of Education

For Sponsor Users

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Introduction

Welcome to the Child Nutrition Program Electronic Application and Reimbursement System (PEARS) user manual for the Summer Food Service Program module. PEARS is a web-based software solution that provides administrators, state users, and Sponsors with efficient and immediate access to applications, claims, and related nutrition program functions.

Web Site Benefits and Features

PEARS is a user-friendly web application that allows authorized users to submit and approve application, claims, and miscellaneous forms via the Internet, as their security rights permit. Key system features include:

- A software system that manages information regarding Sponsors, applications, claims, and reports.
- A single integrated database which serves all child nutrition programs.
- The ability to save partially completed forms on-line, allowing the user to complete the process at a later time.
- Individual User IDs and passwords for secure login to program functions and accurate tracking of user behavior.
- A robust security module that streamlines security setting controls by enabling administrators to easily assign users to numerous pre-defined groups and eliminating the need to manually set each user's security access.

User Manual

This user manual is intended for use by authorized state users that administer the SFSP programs. It is designed to provide a general understanding of how to use the system in an effective and efficient manner. This manual will provide:

- A general explanation of each feature available.
- Screen examples of web site pages and forms.

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

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Getting Started

Before you can begin using PEARS, you must be assigned a user ID and password by the PEARS Help Desk that provides the required security rights. Once this setup is complete, you may use the Internet and your assigned user ID and password to access and log onto the PEARS web site.

Accessing the Web Site

You can access PEARS from any computer connected to the Internet by opening your Internet browser and entering the PEARS URL in the browser's address line. **The PEARS URL for the production environment is:** http://www.pears.ed.state.pa.us/snp/Splash.aspx

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

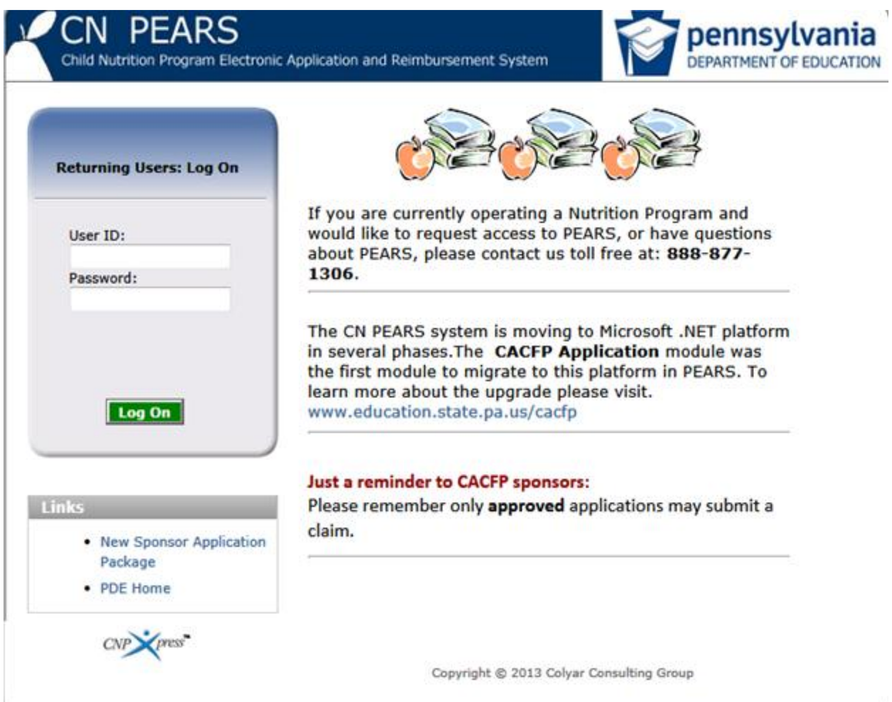


Figure 1: PEARS Home Page

About the PEARS Home Page

The PEARS Home Page consists of three major sections:

- Bulletin Board.
- Log on.
- Links.

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

The log on section is where authorized users enter their User ID and password. If the sponsor user has forgotten their password, please contact PEARS Helpdesk to reset their password.

The links section provides access to websites and additional information:

- Selecting the **SNP Program Resources** link will transfer the user to a webpage that provides additional information on the National School Lunch Program.
- Selecting the **CACFP Program Resources** link will transfer the user to a webpage that provides additional information on the Child and Adult Care Food Program.
- Selecting the **SFSP Program Resources** link will transfer the user to a webpage that provides additional information on the Summer Food Service Program.

Logging On

To log on

1. Access PEARS by typing the URL into the address line of your web browser.
2. Enter your assigned **User ID**.
3. Enter your **Password**.
4. Select **Log On**.

Note: If you do not have a User ID and Password, contact PDE.

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

To change your password

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

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

Note: Security configuration settings require a password ten (10) to twelve (12) characters in length. Please note that the password must be at least ten (10) characters in length.

The password must contain at least one number, one letter, and one special character (e.g., !, ?, /). Passwords are case sensitive.

PEARS Content Overview

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

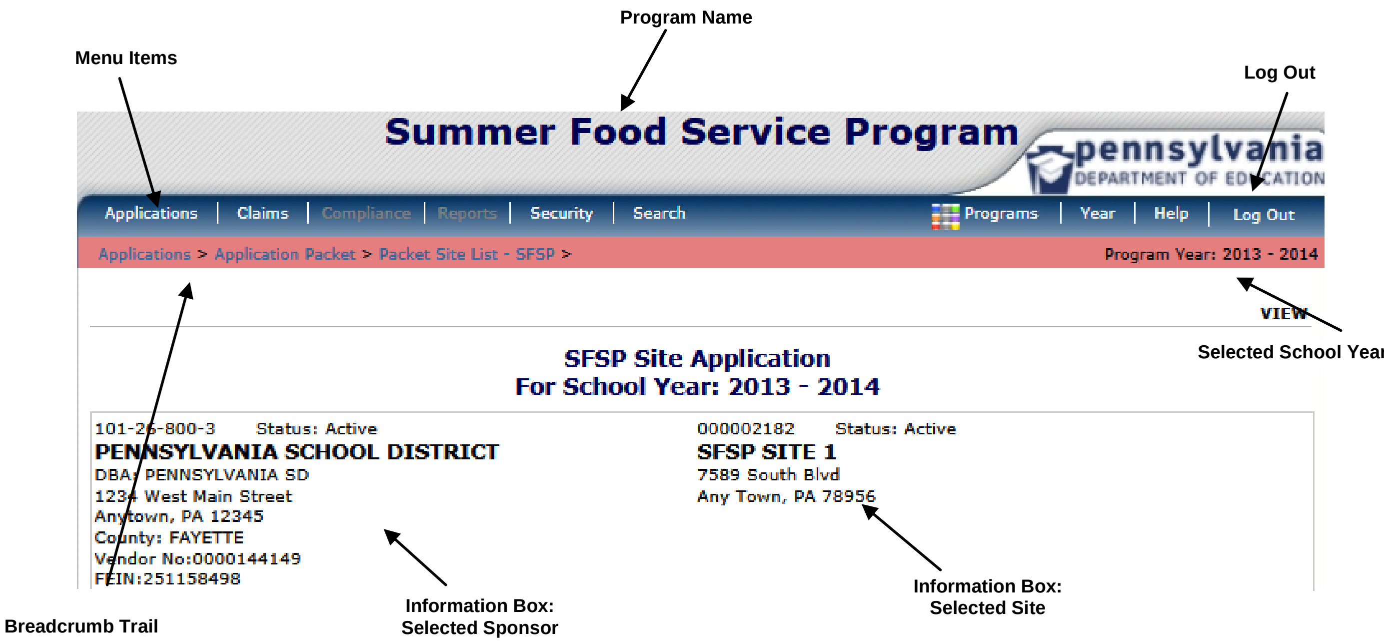


Figure 2: PEARS Content Overview

Item	Description
Program Name	The selected program name appears in the gray area at the top of the page.
Menu Items	Menu items display on the blue menu bar at the top of the page. Selecting a menu item will take you to its menu page. Users may not have access to all menu items. If you are unable to select a particular menu item, you do not have the necessary security rights. Contact the PDE for assistance.
Breadcrumb Trail	The navigation, or breadcrumb trail, identifies your location within the web site. Selecting a specific portion of the trail will take you back to that particular screen.

Item	Description
School Year	The selected school year displays on the right beneath the menu bar. Upon logging in, the system defaults to the most current active school year.
Information Box	The information box displays general information regarding the Sponsor/ Site.
Logout	The logout button displays in the menu bar. It is recommended to select **Logout** to properly exit the system.

Note: For security reasons, the system will automatically log you out after twenty (20) minutes of inactivity.

Screen Options

Data entry screens in the system offer the user some or all of the following options: **VIEW, MODIFY, DELETE, and INTERNAL USE ONLY**. The Screen Options area is located on the top right side of the screen, directly beneath the colored bar.

Figure 3: Screen Options - example

The following table describes each of the possible screen options:

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

PEARS Programs Page

Once you successfully log on, the PEARS Programs page is displayed. Actual access to specific modules is based on the user's security rights.

TIP: The Accounting, Maintenance and Configuration, and Security tiles are always gray because these are administrative modules that are available to only authorized State users. Sponsors will not have access to these modules. Only select authorized State users will have access to these modules.

Figure 4: PEARS Programs Page

Selecting this button…	Provides…
School Nutrition Programs	Access to the School Nutrition Programs home page
Accounting	Access to the Accounting Module home page
Child and Adult Care Food Program	Access to the Child and Adult Care Food Program home page
Maintenance and Configuration	Access to the Maintenance and Configuration module home page
Summer Food Service Program	Access to the Summer Food Service Program home page
Security	Access to the Security Module home page

Summer Food Service Program Home Page

The Summer Food Service Program (SFSP) home page contains the message board used by state administrators to post and maintain Summer Food Service Program-related messages. Messages may contain important news regarding the submission due dates, upcoming training, legislative changes, or any other SFSP-specific information.

To access the Summer Food Service Program home page

1. Log on to the PEARS web site.
2. On the Programs screen, select **Summer Food Service Program**.

Note: If a user only has access to the Summer Food Service Program module, the Programs screen is not be displayed

3. The Summer Food Service Program home page displays.

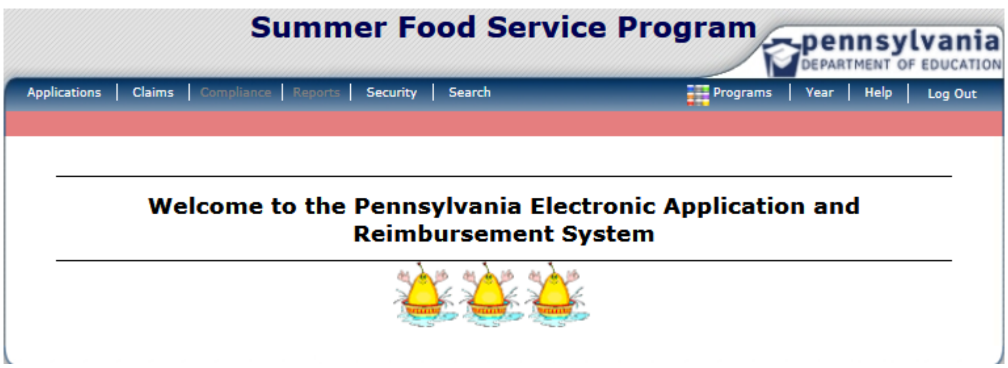


Figure 5: Summer Food Service Program Home Page

Summer Food Service Program menu options

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

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

Menu Item	Menu Features
Applications	Access to overall application-related items including: ▪ Sponsor Manager (State users only). ▪ Application Packet (inc. Sponsor and Site/Provider applications as well as supporting submissions). ▪ Advance Requests ▪ Advance Requests Manager ▪ Download Forms
Claims	▪ Access to SFSP claim entry screens ▪ Claim Rates ▪ Sponsor-specific payment history.
Security	Access to an individual user's security-related items including: ▪ Change Password (authenticated user changing their password).
Search	▪ Access to SFSP Sponsor Search ▪ Access to SFSP Site Search

Error Processing

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

Input Edits

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

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

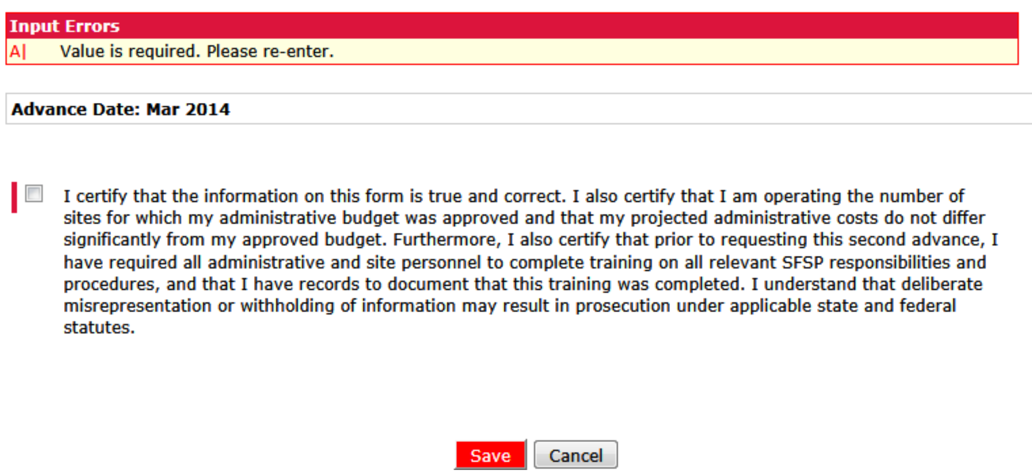


Figure 6: Examples of an Input Error (Partial Screen)

Business Rule Edits

Business rule edits are used to ensure that entered data on a form conforms to state-defined guidelines/requirements and federal regulation. Once the user initiates a save, PEARS will perform business rule edit checks after all input errors have been corrected and display a confirmation screen stating that data entered has been saved and identifies whether errors exist.

The user may correct business rule errors immediately or at another time. The entered data will not be lost. The errors will display at the top of the screen with an error code (usually 4-5 digits) and error description. Business rule edits do not prohibit the system from saving the data entered on the screen.

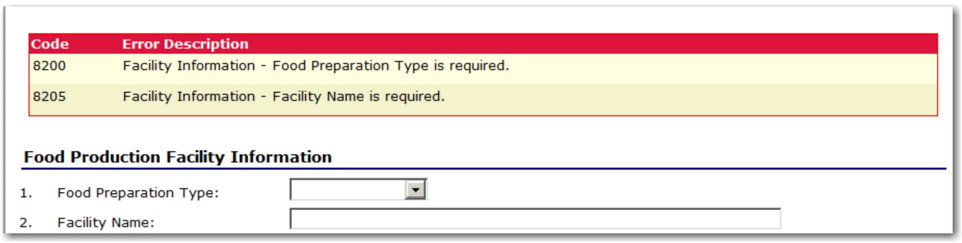


Figure 7: Example of a Business Rule Error (Partial Screen)

In addition, business rule edits have an error severity that indicates whether an error is considered an Error or a Warning. Errors appear in red and must be corrected before the form can be submitted. Warnings appear in blue and indicate an "out of the ordinary" data value. Warning errors do not need to be corrected prior to form submission.

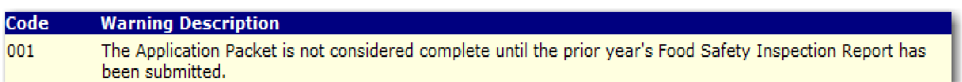


Figure 8: Example of a Warning Error

Note: State administrators maintain the business rule error messages. If you think an error message is incorrect or unclear, please contact the PEARS Help Desk.

Selecting a Program Year

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

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

To select a program year

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

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

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

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

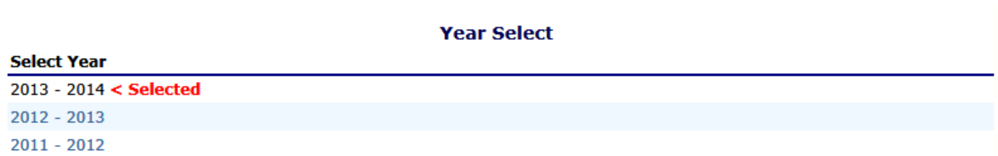


Figure 9: Year Select screen

Sponsor Search

Note: This is not common for SFSP Sponsor users.

If you are associated with more than one Sponsor, you must search for and select a Sponsor using the Sponsor Search function before beginning any task. When the Sponsor Search screen displays, you can search for the Sponsor using all or part of the Sponsor's ID, Name, or any other combination of parameters provided on this screen.

To search for a Sponsor

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

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

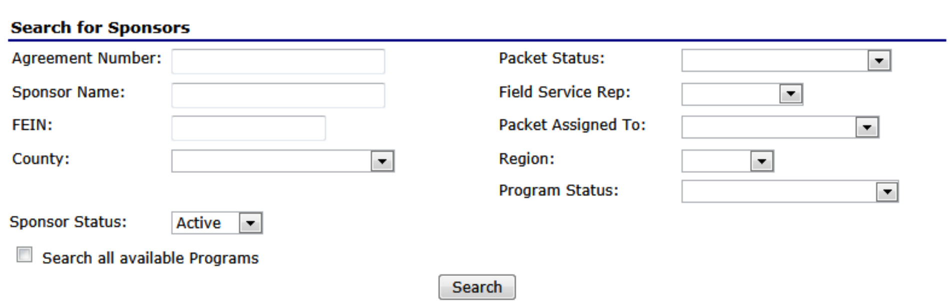


Figure 10: Sponsor Search screen

Note: Users will only see Sponsors associated with their user account.

Site Search

You can also search for and select a Site through the Site Search function on the Search menu.

TIP: Sites only display if they are associated with a Sponsor to which you have access.

You can search for the site using all or part of the Site ID, Site Name, License Number, or Street Address. At least one search criteria must be entered. The search results display in the Site List below the search criteria.

To search for a site

1. On the menu bar, select **Search**.
2. Select **Site Search.**
3. Enter all or a portion of the Site ID, Site Name, Site Type, or Address in the respective text box(es).
4. Select **Search.**
5. Select the desired Site.

Figure 11: Site Search Page

Parameter	Type of Search	Search Features
Site ID	"includes"	▪ If in combination with the Site Name, the Site ID takes precedence ▪ If in combination with any other parameter, all parameters are used to perform the search
Site Name	"includes"	▪ If in combination with the Site ID, the Site ID takes precedence; this parameter is ignored

Parameter	Type of Search	Search Features
		▪ If in combination with any other parameter, all parameters are used to perform the search
Site Type	“exact””	▪ If in combination with the Site ID, the Site ID takes precedence; this parameter is ignored ▪ If in combination with any other parameter, all parameters are used to perform the search
Street Address **City** **State** **Zip Code**	“includes”	▪ If in combination with the Site ID, the search is performed using both the Site ID and this parameter ▪ If in combination with any other parameter, all parameters are used to perform the search

3

Applications

Now that you know how to access and log on to PEARS, the remainder of the manual will explore the functions of the Summer Food Service Program module. Let's first look at the Applications component of PEARS, where users manage yearly enrollment of Sponsors and sites and submit/review Advance Requests.

About the School Year Enrollment Process

In order to participate in the Summer Food Service Program, Sponsors must submit an Application Packet to the State for review and approval. Before beginning the Application Packet, Sponsors must select the "Add" action on the Application Packet screen. The user is then transferred to a blank SFSP Sponsor application screen. A new Application Packet must be submitted and approved for each program year. Once the Application Packet is approved, monthly claims for reimbursement may be submitted.

Packet Assigned To: unassigned

Action	Form Name	Latest Version	Status
Add	Sponsor Application		Not Started

Figure 12: Enrolling in a New Program Year

Submitting an Application Packet

The Sponsor can submit the Application Packet to the State once the application is deemed complete by the system. In order to be able to submit an Application Packet, the packet must contain:

- A completed Sponsor Application with no errors.
- At least one completed SFSP Site Application with no errors.
- A completed Management Plan with no errors.
- A completed Budget Detail with no errors if the Sponsor:
    - had not enrolled in the Summer Food Service Program in the previous year (i.e., “new” application) OR
    - is identified as a Type of Agency of “Private Non Profit Sponsor” (i.e., on their Sponsor Profile).
- All items in the Checklist are identified as submitted to PDE.

TIP: Site Field Trip data can be entered ONLY for approved sites; hence they are usually not part of the initial Application Packet submission by the Sponsor.

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

Packet History

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

Figure 13: Packet History (sub-section of the Application Packet screen)

Applications Menu

The Applications menu is the starting point for all tasks related to the annual Summer Food Service Program enrollment process. Menu items are based on security levels.

To access the Applications Menu

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

2. Select an application item to access that application function.

The following figure displays the complete list of Applications menu items for authorized state users. It is important to note that Sponsors have significantly fewer Applications menu items.

Item	Description
Application Packet	SFSP Applications Forms (Sponsor and Site)
Advance Requests	Request Sponsor's SFSP Advance(s) for the current year
Download Forms	Forms Available for Downloading

Figure 14: SFSP Applications Menu screen (Sponsor view)

Application Packet

In order to participate in the Summer Food Service Program (SFSP), Sponsors must submit an Application Packet to the State for review and approval. At the beginning of each program year, Sponsor data is rolled over and must be verified by Sponsors prior to submitting any claims.

The Application Packet contains the Sponsor application, site application(s), and other forms required as a part of the packet. After selecting Application Packet from the Applications menu, each required packet item and its status displays. If any packet item requires attention (such as an error within a form or a checklist item needs to be completed), a red arrow displays next to the Application Packet item. If the Application Packet item has been completed correctly and contains no errors, a green check displays next to the Application Packet item. For more details, see ***Reviewing an Application***.

Note: Sponsors may not submit claims until their Application Packet has been approved for the respective program year.

Note: Once an Application Packet has been approved, if a Sponsor revises an item within the Application Packet (excluding the Site Field Trip), the Application Packet must be re-submitted for approval. Modifications to the Site Field Trip screen do not initiate the Application Packet approval process.

To access the Application Packet

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

Packet Assigned To: unassigned

Action	Form Name	Latest Version	Status
View | Revise	✔ Sponsor Application	Rev. 1	Approved
View | Revise	✔ Budget Detail	Rev. 1	Approved
Details	✔ Management Plan	Original	Approved
Details	✔ Food Production Facility List (1)		
Details	➡ Site Field Trip List (2)		
Details	✔ Checklist Summary (3)		
Details	Application Packet Notes		

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

Figure 15: Application Packet screen

If the Application Packet is under review by the State, it becomes "read only" to the Sponsor. The Application Packet screen is displayed with the following message to help make the Sponsor aware that they can no longer modify the submitted packet during this time.

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

Figure 16: Application Packet screen – Message

Sponsor Application

The Sponsor Application screen provides access to the Sponsor's annual application for the Summer Food Service Program. The Sponsor is required to complete a new Sponsor application annually; however, if an application is contained within the system from the previous year, **the State** has identified select application data that rolls over from the previous year and pre-fills a new year's application.

To view a Sponsor application (Original)

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.

3. Select View next to the **Sponsor Application** packet item. The Sponsor Application for the designated school year is displayed.

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

To view a Sponsor application (Revision)

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.

3. Select the revision link under the **Latest Version** column. The Sponsor Application History for the designated school year is displayed.

4. Select the application version you would like to view.

TIP: The View option appears in two situations: 1) If the user only has view-access security rights or 2) If the user has modify-access security rights BUT the Application Packet has been submitted to the State and is under State review and therefore can no longer be modified.

To add a Sponsor application (New Sponsor)

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.

3. Select Add next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.

4. Enter required information.

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

6. Select **<Edit** to return to the Sponsor Application screen.

   -OR-

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

TIP: The Add option only appears for new Sponsors. If a Sponsor had an application in the previous year and has elected to enroll in the new year, the prior year's application information is rolled over into the new year's application as a starting point. The user would select **Modify** to review and update this information.

To modify a Sponsor application

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select Modify next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Sponsor Application screen.

   -OR-

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

TIP: The Modify option only appears when the Application Packet has not been submitted. Once an application has been submitted and approved by the State, a revised application must be submitted (i.e., the Revise option is displayed).

To delete a Sponsor application

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select Modify next to the **Sponsor Application** packet item. The Sponsor Application for the designated program year is displayed.
4. Select **DELETE** on the Edit menu in the top-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.

WARNING: A Sponsor application can only be deleted if the Sponsor has not yet submitted any claims for the program year.

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

To revise a Sponsor application

Note: Only state-approved applications can be revised. Once a Sponsor revises <u>any</u> item within the Application Packet, the Application Packet must be re-submitted and the state review and approval process starts again.

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. Select Revise next to the **Sponsor Application** packet item. The Sponsor Application for the designated school year is displayed.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Sponsor Application screen you just modified.
   -OR-
   Select **Finish** to return to the Application Packet screen.

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

Site Applications – Summer Food Service Program

Sponsors must complete a Site Application for each of their sites. The Site Application screen provides access to the Site's annual application for the Summer Food Service Program for both new and renewing sites. Sites must complete a new application annually; however, if an application is contained within the system from the previous year, **the State** has identified select application data that rolls over from the previous year and pre-fills a new year's application.

To access the Sponsor's site list

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.

3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.

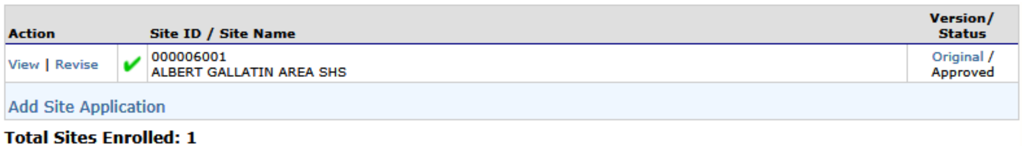


Figure 17: Application Packet – SFSP Site List screen

To add a new site (only available to Sponsors)

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.

3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.

4. At the bottom of the site list, select **Add Site Application.** The SFSP Available Site(s) screen displays.

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

5. If the site you would like to add an application for is listed, select the site. If the site you would like to add an application for is not listed, contact PDE for assistance.

To view a Site Application

1. On the blue menu bar, select **Applications.**

2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.

3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.

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

Application is displayed.

To modify a Site Application

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

To delete a Site Application

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

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

To revise a Site Application

Note: Only state-approved applications can be revised. An application that has been submitted BUT is currently under review by the State CANNOT be revised.

Once a Sponsor revises any item within the Application Packet, the Application Packet must be re-submitted and the state review and approval process starts again.

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The current year's Application Packet screen displays.
3. Under Site Applications, select **Summer Food Service Program**. The Application Packet - SFSP Site List screen displays.
4. Select Revise next to the site whose application you would like to delete. The site's Site Application is displayed.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Site Application screen.
   -OR-
   Select **Finish** to return to the SFSP Site List screen.

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

Management Plan

Sponsors must submit a Management Plan as part of the Application Packet. The system will not allow an Application Packet to be submitted without completion of the Management Plan screen, with no errors. Once a Management Plan is approved, a revision (i.e., a new version) must be created.

To access the Management Plan

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

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

2. Select **View** next to **Management Plan**. The most current Management Plan screen displays.

   Note: If there are multiple versions of a Management Plan within the system (i.e., revisions exist), the system defaults to the most current version.

To add a Management Plan

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Add** next to **Management Plan**. A blank Management Plan screen displays.
4. Complete the form.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Management Plan screen.

   -OR-

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

To view a Management Plan

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. To view the most current Management Plan, select **View** next to **Management Plan**. The Management Plan screen displays.

   –OR-

   To view a prior Management Plan, select the revision link under the **Latest Version** column.   The Sponsor Management Plan History for the designated program year is displayed.

Version	Status	Approved Date
Revision 1	Pending Validation	
Original	Approved	04/21/2011

Figure 18: Sponsor Management Plan History screen

4. Select the Management Plan version you would like to view.

To modify a Management Plan

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Modify** next to **Management Plan**. The Management Plan screen displays with the most current, un-submitted Management Plan data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Management Plan screen.

   -OR-

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

To revise a Management Plan

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Revise** next to **Management Plan**. The Management Plan screen displays with the most current Management Plan data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Management Plan screen.

   -OR-

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

TIP: When creating a revision, the system maintains the previously-approved Management Plan that can be accessed via the Sponsor Management Plan History screen.

Food Production Facility

The Food Production Facility section of the Application Packet contains information about each food production facility that the Sponsor will use to provide meals to its sites.

To access the Food Production Facility List

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list screen displays.

Figure 19: Food Production Facilities list screen

To add a Food Production Facility

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list screen displays.
4. Select the **Add Facility** button. A blank Food Production Facility screen for the specified year is displayed.
5. Complete the form.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Food Production Facility screen.
   -OR-
   Select **Finish** to return to the Food Production Facilities list screen.

To modify a Food Production Facility

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list screen displays.
4. Select the facility you want to modify. The Food Production Facility screen displays.
5. Modify any desired information.
6. Select **Save**. A confirmation screen displays.
7. Select **<Edit** to return to the Food Production Facility screen.
   -OR-
   Select **Finish** to return to the Food Production Facilities list screen.

To delete a Food Production Facility

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Food Production Facility List**. The Food Production Facilities list

screen displays.

4. Select the facility you want to delete. The Food Production Facility screen displays.

5. Select **DELETE** on the Edit menu in the top-right corner. The system transfers you to the bottom of the screen and a warning message is displayed.

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

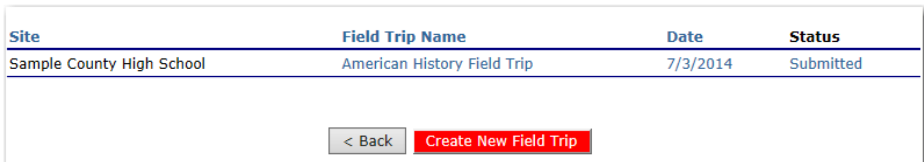
WARNING: Once the facility has been deleted, it is permanently removed and cannot be restored. Use caution before deleting a contract.

Site Field Trip

The Site Field Trip section of the Application Packet contains information about any field trips that an approved site will conduct for the specified year. Note: Only approved sites can be associated with a Site Field Trip. Therefore, an initial review of an Application Packet will not include Site Field Trip forms because the State has not yet approved any sites.

To access the Site Field Trip List

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.



Site	Field Trip Name	Date	Status
Sample County High School	American History Field Trip	7/3/2014	Submitted

< Back   Create New Field Trip

Figure 20: Site Field Trip list screen

TIP: A field trip can be added ONLY for approved SFSP sites (i.e., an approved SFSP site application for the designated year).

To add a Site Field Trip

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
4. Select the **Create New Field Trip** button. A blank Site Field Trip screen for the specified year is displayed.
5. Select the Sponsor's Site that will conduct the field trip.
6. Select the **Continue** button. The Site Field Trip screen is re-displayed with the selected site at the top of the page and field trip fields required for completion.
7. Complete the form.

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

9. Select **<Edit** to return to the Site Field Trip screen.

   -OR-

   Select **Finish** to return to the Field Trip – Site List screen.

To modify a Site Field Trip

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

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

3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.

4. Select the field trip you want to modify. The Site Field Trip screen displays.

5. Modify any desired information.

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

7. Select **<Edit** to return to the Site Field Trip screen.

   -OR-

   Select **Finish** to return to the Field Trip – Site List screen.

To cancel a Site Field Trip

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

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

3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.

4. Select the field trip you want to cancel. The Site Field Trip screen displays.

5. Check the box in question 6 “Cancel Request”.

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

7. Select **<Edit** to return to the Site Field Trip screen.

   -OR-

   Select **Finish** to return to the Field Trip – Site List screen.

TIP: Only approved field trips can be cancelled. If the field trip is not approved, but it will no longer occur, use the Delete feature.

WARNING: A cancelled field trip cannot be "un-cancelled". If the Sponsor decides to re-instate the field trip, a new field trip must be added.

To delete a Site Field Trip

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Details** next to **Site Field Trip List**. The Field Trip – Site List screen displays.
4. Select the field trip you want to delete. The Site Field Trip screen displays.
5. Select **DELETE** on the Edit menu in the top-right corner. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.

TIP: A field trip cannot be deleted once it is approved. If the field trip will not occur, see the "To cancel a Site Field Trip" section.

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

Budget Detail

The Budget Detail screen must be completed by Sponsors that:

- had not enrolled in the Summer Food Service Program in the previous year (i.e., "new" application) OR
- is identified as a Type of Agency of "Private Non Profit Sponsor" (i.e., on their Sponsor Profile).

In these instances, the system will not allow an Application Packet to be submitted without completion of the Budget Detail screen, with no errors.

In addition, the Budget Detail must be completed if an Advance Request is submitted; however, the submission of an Advance Request occurs outside of the system's Application Packet sub-module and therefore must be manually validated by the State.

Once a Budget is approved, a revision (i.e., a new version) must be created.

To access the Budget Detail

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **View** next to **Budget Detail**. The most current Budget Detail screen displays.

   Note: If there are multiple versions of a budget within the system (i.e., revisions exist), the system defaults to the most current version.

To add a Budget Detail

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Add** next to **Budget Detail**. A blank Budget Detail screen displays.
4. Complete the form.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Budget Detail screen.

   -OR-

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

To view a Budget Detail

1. On the blue menu bar, select **Applications.**
2. From the Applications menu, select **Application Packet**. The most current year's Application Packet screen displays.
3. To view the most current Budget Detail, select **View** next to Budget Detail. The Budget Detail screen displays.

   –OR-

   To view a prior Budget Detail, select the revision link under the **Latest Version** column. The Sponsor Budget History for the designated school year is displayed.

Version	Status	Approved Date
Revision 1	Pending Validation	
Original	Approved	04/21/2011

Figure 21: Sponsor Budget History screen

4. Select the budget version you would like to view.

To modify a Budget Detail

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Modify** next to **Budget Detail**. The Budget Detail screen displays with the most current, un-submitted budget data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Budget Detail screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

To revise a Budget Detail

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Revise** next to **Budget Detail**. The Budget Detail screen displays with the most current budget data.
4. Modify any desired information.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Budget Detail screen.
   -OR-
   Select **Finish** to return to the Application Packet screen.

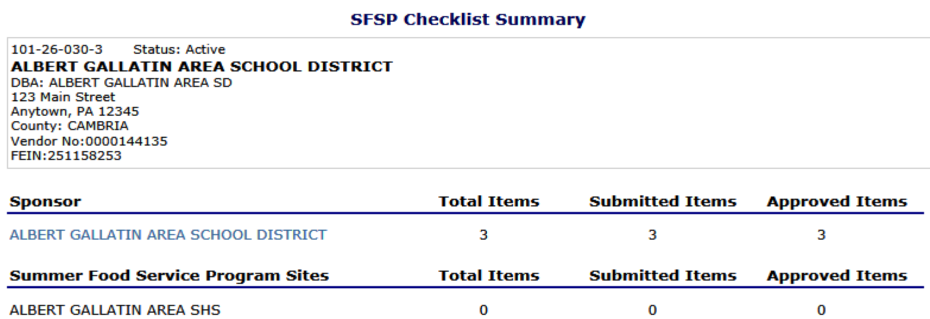
TIP: When creating a revision, the system maintains the previously-approved budget that can be accessed via the Sponsor Budget History screen.

Checklist

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

To access a Checklist

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


SFSP Checklist Summary

101-26-030-3 Status: Active
ALBERT GALLATIN AREA SCHOOL DISTRICT
DBA: ALBERT GALLATIN AREA SD
123 Main Street
Anytown, PA 12345
County: CAMBRIA
Vendor No:0000144135
FEIN:251158253

Sponsor	Total Items	Submitted Items	Approved Items
ALBERT GALLATIN AREA SCHOOL DISTRICT	3	3	3

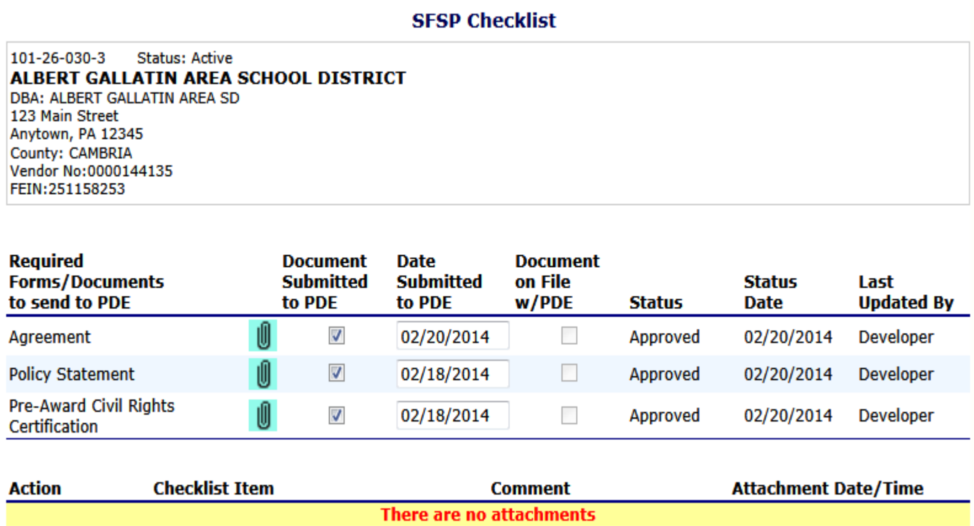
Summer Food Service Program Sites	Total Items	Submitted Items	Approved Items
ALBERT GALLATIN AREA SHS	0	0	0

Figure 22: Checklist Summary screen

To view a Checklist

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

   Note: Only Sponsors and sites who have completed their applications and who have additional required documents will have a checklist.



SFSP Checklist

101-26-030-3 Status: Active
ALBERT GALLATIN AREA SCHOOL DISTRICT
DBA: ALBERT GALLATIN AREA SD
123 Main Street
Anytown, PA 12345
County: CAMBRIA
Vendor No:0000144135
FEIN:251158253

Required Forms/Documents to send to PDE		Document Submitted to PDE	Date Submitted to PDE	Document on File w/PDE	Status	Status Date	Last Updated By
Agreement		☑	02/20/2014	☐	Approved	02/20/2014	Developer
Policy Statement		☑	02/18/2014	☐	Approved	02/20/2014	Developer
Pre-Award Civil Rights Certification		☑	02/18/2014	☐	Approved	02/20/2014	Developer

Action	Checklist Item	Comment	Attachment Date/Time
There are no attachments			

Figure 23: Checklist screen (partial screen)

To update a Checklist

1. On the blue menu bar, select **Applications.** The Applications menu screen displays.
2. On the menu, select **Application Packet**. The Application Packet screen displays.
3. Select **Checklist Summary**. The Checklist Summary screen displays.
4. Select the Sponsor or Site whose checklist you wish to update. The Checklist screen displays.
5. Identify whether the document has been submitted and the submission date. The Date Submitted to PDE field automatically defaults to the system date. This can be changed by the user. A checklist is not considered complete until all checklist items are identified as having been submitted to PDE.
6. Select Save. The Checklist Summary screen displays.

To upload an attachment to a Checklist item

Note: If the checklist item has a paper clip icon next to it, you can upload an attachment. Files in the following formats can be uploaded: .doc, .xls, .pdf, and .jpg.

1. Select the paper clip. The Checklist File Upload Details screen displays.
2. Use the **Browse** button to select the file to upload. If desired, enter a brief comment

(field is not required)

3. Select **Save**.

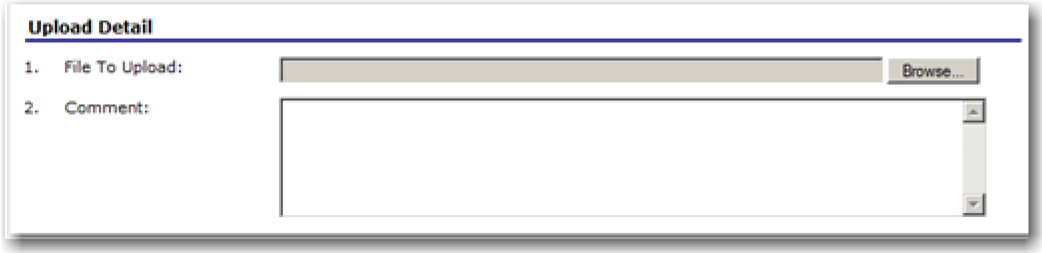


Figure 24: Checklist File Upload Detail screen

Advance Requests

Sponsors use the Advance Requests menu option to submit a request for operational or administrative payment advances and to view the status of their submitted requests. This screen is Sponsor-specific.

To access Advance Requests

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

Action	Advance Month	Advance Type	Advance Amount	Outstanding Balance	Status	Date Processed
	Oct 2013				n/a	
	Nov 2013				n/a	
	Dec 2013				n/a	
View | Modify	Jan 2014	Operating			Pending Approval	
	Jan 2014	Administrative			Pending Approval	
Add	Feb 2014				n/a	
Add	Mar 2014				n/a	
Add	Apr 2014				n/a	
View | Modify	May 2014	Operating			Not Requested	
	May 2014	Administrative			Pending Approval	
Add	Jun 2014				n/a	
Add	Jul 2014				n/a	
Add	Aug 2014				n/a	
Add	Sep 2014				n/a	
		Totals	$ 0.00	$ 0.00		

Figure 25: Advance Request list screen

To add an Advance Request

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select Add next to the advance month for which you would like an advance. The Advance Request screen displays.
4. Select the type of advance you are requesting.

5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Advance Request screen.
   -OR-
   Select **Finish** to return to the Advance Requests list screen.

Note: At least one site must have at least ten (10) operating dates in the advance month to request an advance.

Note: A Sponsor may request up to three (3) Operating Advances and up to two (2) Administrative advances for a designated program year.

To view or modify an Advance Request

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select the advance you would like to view or modify. The Advance Request screen displays.
4. Update information, if desired.
5. Select **Save**. A confirmation screen displays.
6. Select **<Edit** to return to the Advance Request screen.
   -OR-
   Select **Finish** to return to the Advance Requests list screen.

To delete an Advance Request

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Advance Requests**. The Advance Request list screen displays.
3. Select the advance you would like to delete. The Advance Request screen displays.
4. Select **DELETE** on the Edit menu in the top-right corner.
5. The system transfers you to the bottom of the screen and a warning message is displayed.
6. Select the **Delete** button at the bottom of the page. A confirmation message displays.
7. Select **Finish**.

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

Download Forms

The Download Forms function allows users to view, download and/or print all forms and documents made available on the site by the State.

To access Download Forms

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

To download or view a form

1. On the blue menu bar, select **Applications**. The Applications menu screen displays.
2. On the menu, select **Download Forms**. The Download Forms screen displays a list of all available forms.
3. Select the Form ID of the form you wish to download. If the form is a document, a gray dialog box appears.
4. Select **Open** to view the form.
   - OR -
   Select **Save** to save the form to your computer.

> **Note:** The software application associated with the form will initiate the opening of the form. For example, if the form is a Microsoft Word document, Microsoft Word on your desktop will initiate the opening of the form. This is also true with Microsoft Excel or Adobe Acrobat forms.

5. Select the <**Back** button to return to the previous screen.

Download Forms

View: Grouped

	Form ID	Description	Last Modified	New Sponsor?
	SFSP - Commodities - PA Department of Agriculture (5)			
	PDE358	2012 Closing Report Cover Letter	05/16/2013	N
	PDE335	Commodities Agreement	05/16/2013	N
	PDE218	SNP Commodity Price List for 2012	05/16/2013	N
	PDE357	Summer Feeding Closing Report	05/16/2013	N
	PDE220	Food Distribution Contacts & ECOS Quick Notes	05/16/2013	N

Figure 26: Download Forms screen (partial screen)

TIP: The New Sponsor? column indicates whether the form is required for submission by Sponsors new to the Summer Food Service Program.

4

Claims

The PEARS Claims component allows Sponsors to submit monthly online reimbursement claim requests to the State, review claim rates, and review historical payment summaries.

About the Claims Process

A Sponsor submits a reimbursement claim to the State for every month in which one or more sites participate in the Summer Food Service Program. Sponsors may enter Sponsor and site information into the monthly claim form beginning at the first of every month. Sponsors have sixty days from the last day of the claim month/year to submit an original claim.

Note: Claims cannot be created for a month if there is no approved Application Packet in effect for that period. If you cannot access claims for a specific month, be sure your Application Packet has been approved. If your Application Packet has been approved and you still cannot enter a claim for a specific month, contact the PEARS Help Desk to validate the effective date of the Sponsor application and Site application.

At the time claims are submitted, they are checked by the system to ensure they conform to established business rules governing reimbursement claim eligibility and approval.

The following table identifies the steps related to submitting and processing a claim:

Performed by	Task
Sponsor	Complete the Claim for Reimbursement form(s) for the selected claim month. Submit error-free claim to the State for processing.

Claims Menu

Sponsors use the Claims menu to access SFSP claim functions, view current claim rates, or view payment summaries.

Item	Description
Claim - SFSP	Summer Food Service Program Claims
Claim Rates	View current claim rates
Payment Summary	Summary of payments made to this Sponsor

Figure 27: Claims Menu screen

Claim Dates

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

Date	Description
Date Created	This date is set to the current system date when the claim is initially created.
Date Modified	This date is set to the current system date when the claim is initially created and each time the claim is saved.
Date Received	This date is typically set to the date the claim was first submitted to the State. The date can be changed by an authorized State user via the Internal Use Only section of the claim form until the claim has been processed for payment. The value of this field is used to validate the 60 day claim rules.
Date Accepted	This date is set to the current system date each time the claim is submitted for payment and contains no errors. If errors are detected during the submit process, the date is not set. These claims are identified with a status of "Accepted". Accepted claims can be modified until they are included in a payment batch.
Date Processed	This is the date that the claim was added by the State into the batch payment process (via Payment Tracking in the Accounting module). Once the claim has been added to a batch (i.e., "batched"), it cannot be modified. These claims are identified with a status of "Accepted*" until the batch process has completed. When the batch process is completed, the status of the claim is "Processed". If a change is required to a claim that has a status of "Accepted*" or "Processed", a revised claim must be entered into the system.

Claims

The SFSP claim function is used to enter, modify, and view claims. The system provides the ability to submit claims at the Sponsor or site level. Original and upward adjusted claims cannot be submitted if the received date is more than 15 days from the last day of the claim month/year. In order to create a claim in a given month, an approved Application Packet must be in effect for the period.

WARNING: Only Sponsors authorized by the State can submit site-level claims. Please contact PDE if you are interested in site-level claiming.

To access Claim Entry

1. On the blue menu bar, select **Claims**. The Claims menu screen displays.
2. From the Claims menu, select the **Claim - SFSP**. The Claim Year Summary screen displays.

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

   If no Sponsor has been selected, use the Sponsor Search to search for and select a Sponsor.
3. Select the Claim Month you would like to submit a claim. The Claim Month Details screen displays.

   Note: The current school year is the default year if no other school year has been selected. For help selecting a new school year, see ***Selecting a School Year***.

Claim Year Summary

The Claim Year Summary summarizes information regarding the claim for each claim month in the designated year:

- Adj Number: identifies the number of revisions associated with the claim. Each revision must be re-processed by the state.
- Claim Status: identifies the current status of the claim.
- Date Received: identifies the date the system initially received the claim submission. Note: the State has the authority to modify this date.
- Date Processed: identifies the date the claim was included in the payment batch process.
- Earned Amount: identifies the current value of the claim.

Note: Only months that are identified as valid operational months for the Sponsor are enabled to submit claims.

Claim Month	Adj Number	Claim Status	Date Received	Date Processed	Earned Amount
Oct 2013	0	Processed	11/15/2013	01/14/2014	$2,557.00
Nov 2013					$0.00
Dec 2013					$0.00
Jan 2014					$0.00
Feb 2014					$0.00
Mar 2014					$0.00
Apr 2014					$0.00
May 2014					$0.00
Jun 2014					$0.00
Jul 2014					$0.00
Aug 2014					$0.00
Sep 2014					$0.00
				Year to Date Totals	**$2,557.00**

Figure 28: Claim Year Summary screen

Claim Month Details

From the Claim Month Details screen, you can access a specific claim form or a summary of the submitted claim.

If the claim has been processed, the options are View (to view the completed claim form) or Summary (to view the calculated payment summary related to the claim).

Claim Month: October 2013

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View | Summary	0	11/15/2013	01/14/2014	01/14/2014	$2,557.00	Processed
				Total Earned	$2,557.00	

Figure 29: Claim Month Details screen – Example of Processed Claims

If the claim has not been processed, the options are View (to view the completed claim form), Modify (to enter a new claim or modify an existing claim) or Summary (to view the calculated payment summary related to the claim).

Claim Month: October 2013

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
View | Summary	0	11/15/2013	01/14/2014	01/14/2014	$2,557.00	Processed
View | Modify | Summary	1	02/20/2014	02/20/2014		$0.00	Accepted
				Total Earned	$2,557.00	

Figure 30: Claim Month Details screen – Example of Non-Processed Claims

Note: Claims can be modified UNTIL they have been added by the State into the batch payment process. Once a claim has been included in a payment batch, the status of the claim is "Accepted*" until the batch process has completed. When the batch process has completed, the status of the claim is "Processed".

Claim Site List

All SFSP Sponsors perform site-level claiming. The Sponsor will first select Add Original Claim from the Claim Months Detail screen. The Claim Site List screen will display.

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
There are no claims for this month.						
				Total Earned	$0.00	

< Back | Add Original Claim

Figure 31: Claim Site List screen

The Sponsor would use the Claim Site List screen to select the site whose claim to add, view, or modify.

Note: Only active sites with an approved application packet for the school year will have the ability to enter a claim via the Claim for Reimbursement screen.

Month/Year Claimed	Adjustment Number	Date Received	Date Accepted	Date Processed	Reason Code
Oct 2013	1	02/20/2014	02/20/2014		Other - No Fiscal Action

Internal Use Only

Actions	Site #	Site Name	1st Meal Amount	2nd Meal Amount	Previous Amount	Errors	Status
View | Modify	5000001883	Site 1	$2,505.00	$52.00	$2,557.00		Approved
		Total	$2,505.00	$52.00	$2,557.00		Net $0.00

Figure 32: Claim Site List screen

To add an original claim

Claims can be entered for each eligible month in the school year. Eligible months are determined based on an approved Application Packet and the designated application effective date (identified by the State in the Internal Use Only section of the Sponsor and Site applications).

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select **Add Original Claim** button. For site-level claiming, the Claim Site List screen displays.

Claim Items	Adj Number	Date Received	Date Accepted	Date Processed	Earned Amount	Status
There are no claims for this month.						
				Total Earned	$0.00	

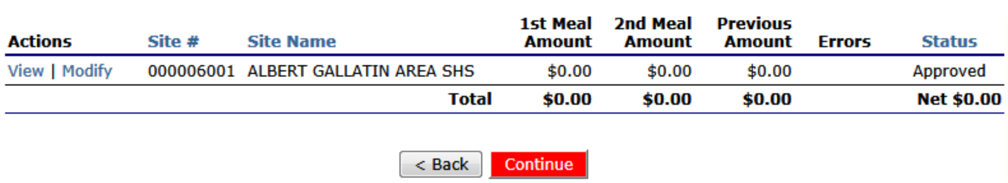
< Back | Add Original Claim

Figure 33: Claim Month Details screen – Add Original Claim

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

4. Under Actions, select **Add** to the left of the Site Name you wish to add an original claim. The Claim for Reimbursement screen displays
5. For each site claim, enter claim information for all enrolled programs.

1. Select **Save**. If there are no errors, the data is saved and the user is returned to Claim Site List screen.
2. Repeat Steps 3-6 for each desired site.
3. Once all site claims are completed, select the **Continue** button on the Claim Site List screen. The Claim Month Details screen is displayed. Review the data for accuracy.



Actions	Site #	Site Name	1st Meal Amount	2nd Meal Amount	Previous Amount	Errors	Status
View | Modify	000006001	ALBERT GALLATIN AREA SHS	$0.00	$0.00	$0.00		Approved
		Total	$0.00	$0.00	$0.00		Net $0.00

< Back | Continue

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

To submit the claim, check the Certification box and select the **Submit for Payment** button.

Note: When the **Submit for Payment** button is selected, the system performs additional edit checks (e.g., 60 day rule, etc.). If the system identifies errors, the errors must be corrected before the user can submit the claim for payment.

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

WARNING: If the Sponsor has <10 days in their final month of operation, the Sponsor must submit a combined claim representing the current month + previous month'.

To modify an un-processed claim

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select **Modify**. The Claim Site List screen displays.
4. Under Actions, select **Modify** to the left of the Site you wish to view. The Site Claim Report screen displays.

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

5. Update claim information.
6. Select **Save**. If there are no errors, the data is saved and the user is returned to Claim Site List screen.
7. Repeat Steps 4-6 for each desired site claim you would like to modify.
8. Once all site claims are completed, select the **Continue** button on the Claim Site List screen. The Claim Month Details screen is displayed. Review the data for accuracy.
9. To submit the modified claim, check the Certification box and select the Submit for Payment button.

   Note: When the **Submit for Payment** button is selected, the system performs additional edit checks. If the system identifies errors, the errors must be corrected before the user can submit the claim for payment.

To revise a processed claim

Claim revision resulting in a downward adjustment may be submitted at any time. Claim revisions resulting in an upward adjustment may be submitted if the date of submission is within 30 days of the last day of the original claim month. Revised claims must be re-processed by the State regardless of their original status.

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Sponsor is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Revise** to the left of the Site Name whose claim you wish to revise. The Claim for Reimbursement screen displays

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

4. Make any necessary changes to the claim.
5. Select **Save**. If there are no errors, the data is saved and the user is returned to Claim Site List screen.
6. Repeat Steps 3-5 for each desired site.
7. Once all site claims are completed, select the **Continue** button on the Claim Site List screen. The Claim Month Details screen is displayed. Review the data for accuracy.

   To submit the revised claim, check the Certification box and select the **Submit for Payment** button.

   Note: Revised claims must be re-processed by the State regardless of their original status.

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

To view a claim

1. From the Claims menu, select the **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Sponsor is performing Sponsor-level claiming, select **View.** The Claim for Reimbursement screen displays.

   If the Sponsor is performing site-level claiming, the Claim Site List screen displays.

Under Actions, select **View** to the left of the Site Name you wish to view. The Claim for Reimbursement screen displays

To view a Claim Summary

The Claim Summary allows you to view a summary of the month's claim in an easy-to-read or print format. No modifications can be made from this page.   A Claim Summary is not available until a claim has been submitted with no errors.

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. If the Sponsor is performing site-level claiming, the Claim Site List screen displays. Under Actions, select **Summary** to the left of the Site Name you wish to view. The Claim for Reimbursement Summary screen displays.

To delete a claim

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

1. From the Claims menu, select **Claim - SFSP**. The Claim Year Summary screen displays.
2. Select the desired Claim Month. The Claim Month Details screen displays.
3. Select **Modify**.
4. Select **Modify** to the left of the Site Name you wish to view. The Claim for Reimbursement screen displays
5. Select **DELETE** in the Edit menu in the upper-right corner.
6. The system transfers you to the bottom of the screen and a warning message is displayed.
7. Select the **Delete** button at the bottom of the page. A confirmation message displays.
8. Select **Finish**.

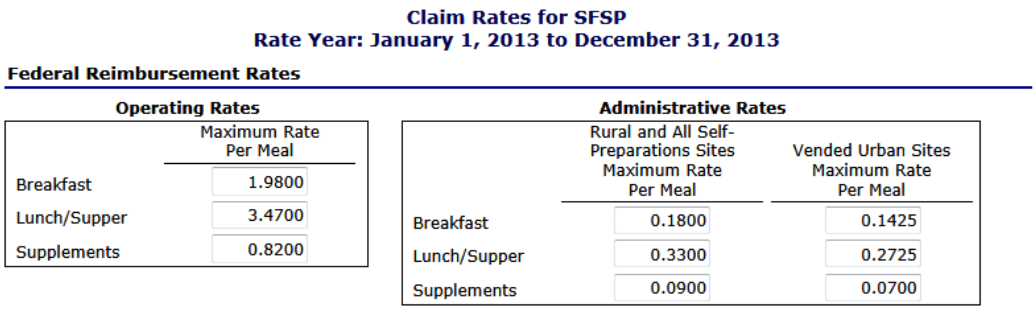
WARNING: Once the claim has been deleted, it is permanently removed from the application and cannot be restored. Use caution before deleting a claim.

Claim Rates

The system provides a screen to view claim for reimbursement rates by year. The rates displayed apply for the rate year defined at the top of the page. Meals are reimbursed based on the designated rate established by the USDA. Annually, the reimbursement rates are entered by authorized PDE staff through the Claim Rate Maintenance screens in the Maintenance and Configuration module.

To access Claim Rates

1. From the Claims menu, select **Claim Rates**. The Claim Rates screen displays.
2. Use the **<Back** button to return to the Claims menu.



Claim Rates for SFSP
Rate Year: January 1, 2013 to December 31, 2013

Federal Reimbursement Rates

Operating Rates

	Maximum Rate Per Meal
Breakfast	1.9800
Lunch/Supper	3.4700
Supplements	0.8200

Administrative Rates

	Rural and All Self-Preparations Sites Maximum Rate Per Meal	Vended Urban Sites Maximum Rate Per Meal
Breakfast	0.1800	0.1425
Lunch/Supper	0.3300	0.2725
Supplements	0.0900	0.0700

Figure 34: Claim Rates for SFSP screen

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

Payment Summary

The Payment Summary screen provides a list of all payment batch schedules processed for the Sponsor for the selected school year. Each schedule number and process date represents payments that have been scheduled. Payments from payment batches are grouped by program and sorted by date.

To access Payment Summary

1. From the Claims menu, select **Payment Summary**. The Payment Summary List screen displays.
2. Use the **<Back** button to return to the Claims menu.

Schedule Number	Processed Date	Warrant Issue Date	Earned Amount	Adjustments	Distribution Amount
11042101	04/21/2011		$ 26,316.00	$ 0.00	$ 26,316.00

Figure 35: Payment Summary List screen

To view a Payment Summary

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

Schedule Number	Schedule Process Date	Federal Year	Warrant Number	Paid Date
11042101	04/21/2011	2010-2011		

Account Description	Month	Transaction Description	Amount
SFSP Meals			
	Jan 2011	Original Claim	$ 23,766.00
	Jan 2011	Distribution for Claim #100231	$ 23,766.00
SFSP Admin			
	Jan 2011	Original Claim	$ 2,550.00
	Jan 2011	Distribution for Claim #100231	$ 2,550.00

Payment Schedule Summary		
Jan 2011	SFSP Meals	$ 23,766.00
Jan 2011	SFSP Admin	$ 2,550.00
	Total Payments	**$ 26,316.00**

Figure 36: Payment Summary screen

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Security

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

Security menu

The Security menu option within the Summer Food Service Program module is the access point to the Change Password and User Manager functions.

To access the Security menu

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

To access Change Password

1. On the blue menu bar, select **Security**.
2. On the Security menu, select **Change Password.** The Change Password screen displays.
3. Enter your **New Password**.
4. Re-Enter your New Password.
5. Select **Save**. A confirmation message displays.
6. Select **<Edit** to return to the Change Password screen you just modified.
   -OR-
   Select **Finish** to return to the Security menu.

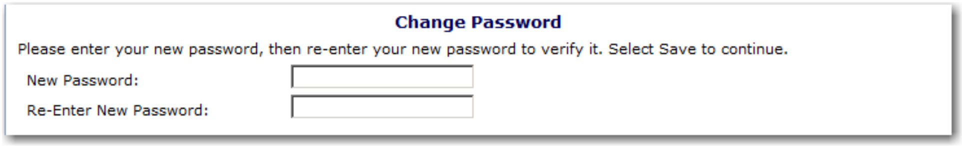

Figure 37: Change Password screen

Note: Security configuration settings require a password eight (8) to twelve (12) characters in length. Please note that the password must be at least eight (8) characters in length. The password must contain at least one number, one letter, and one special character (e.g., !, ?, /). Passwords are case sensitive.

6

Application Packet Process

This section of the manual provides information on how the State can review and approve SFSP Application Packets through PEARS.

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

Submitting an SFSP Application Packet

All new enrollment or renewal enrollment applications are initially created with a status of "Pending Validation". Once the Application has been saved, the systems validates the business rules and the application's status is set by the system to either "Error" (if any errors exist) or "Not Submitted" (no errors, but the Application Packet has not been submitted).

Only complete Application Packets that have no errors can be submitted to the State. To submit a completed Application Packet, the Sponsor would select the **Submit for Approval** button. This simulates sending a completed Application Packet in the mail. Application items are placed in a view-only mode for the Sponsor.

An Application Packet can be submitted to the State (i.e., the **Submit for Approval** button is enabled) only if the following conditions have been met:

- The Sponsor Application must contain no errors.
- At least <u>one</u> Site Application must exist and contain no errors.
- A Management Plan must exist and contain no errors.
- A Budget must exist and contain no errors if the Sponsors that:
    - had not enrolled in the Summer Food Service Program in the previous year (i.e., "new" application)

  OR

- o is identified as a Type of Agency of "Private Non Profit Sponsor" (i.e., on their Sponsor Profile).
- All items in the Checklist must be submitted (submitted checkbox checked and date submitted is entered).
- The Sponsor is not closed.

Once the Sponsor has submitted the Application Packet, the State will review each item in the submitted Application Packet. The State may approve each application item, deny an application item, or return the application item and its respective Application Packet back to the Sponsor for correction.

If the Application Packet is denied or returned to the Sponsor for correction, the State will provide comments within the respective Application Packet item as to why the application was denied or what needs to be corrected in order to re-submit the Application Packet.

SFSP Application Packet Checklist Items

Sponsor Application

1. The following checklist items are required for ALL New and Renewal SFSP Sponsor applications:

    - Purchased Meals Contract – Only Vended

    The following checklist items are required for ALL New SFSP Sponsor applications:

    - Policy Statement
    - Permanent Agreement
    - Pre-Award Civil Rights Certification

Site Application

1. The following checklist item is required for ALL New and Renewal SFSP Site applications:

    - Rosters/Eligibility Documentation

Application Packet Statuses

Statuses are used to manage the workflow of the Application Packet. Each packet can have only one status at a time.

- Not Submitted
  - The packet has a status of "Not Submitted" when the packet is created for the first time or when any of the packet items are created, revised, or modified, but the Application Packet has not been submitted to the State.
- Submitted
  - The packet has a status of "Submitted" when the Sponsor uses the **Submit for Approval** button on the Application Packet screen to submit the error-free packet to the State for review.
  - If the packet status is "Submitted", the entire packet becomes read-only to the Sponsor.
  - All applications that are "Submitted" must ultimately be "Approved", "Denied", or "Returned for Correction" or "Withdrawn".
- Approved
  - The packet has a status of "Approved" when the State has approved each packet item AND has selected the **Approve** button on the Application Packet screen.
- Denied
  - The packet has a status of "Denied" when the State selects the **Deny** button on the Application Packet screen.
  - When a packet is "Denied", the packet remains view-only and nothing in the packet can be modified. The only way to edit items in a denied packet is for the State to change the status of the packet to something other than "Denied".
  - By denying an Application Packet, the status of all items within the packet is automatically set to "Denied".
  - An "Approved" packet cannot be "Denied".
- Returned for Corrections
  - The packet has a status of "Returned for Corrections" when the State selects the **Return** button on the Application Packet screen.
  - This status unlocks the packet for the Sponsor and sets the status back to "Not Submitted".
  - An "Approved" packet cannot be "Returned for Corrections".
- Withdrawn
  - The packet has a status of "Withdrawn" when the Sponsor or State selects the **Withdraw** button on the Application Packet screen.
  - An Application Packet with a status of "First Level Approved" can be withdrawn.
  - An Application Packet with a status of "Approved" packet cannot be "Withdrawn". If an application has been "Approved", it can only be "Cancelled" or "Terminated" by the State (see ***Application Packet*** section).

Application Statuses

Statuses are used to define the current state of an application packet item. Each application can have only one status at a time.

- Pending Validation
  - The application has a status of "Pending Validation" when the application has not yet been opened or saved.
- Error
  - The application has a status of "Error" if it has failed system validation rules. Data entered is maintained.
- Not Submitted
  - The application has a status of "Not Submitted" when the application is saved without error, but the Application Packet has not been submitted to the State.
- Submitted
  - The application has a status of "Submitted" when the Sponsor has submitted the Application Packet to the State for review (i.e., the Sponsor has selected the **Submit for Approval** button).
  - Any application that is marked "Not Submitted" is changed to "Submitted"
  - The Application Packet becomes read-only to Sponsor users.
- Approved
  - The application has a status of "Approved" when the State has approved the application (i.e., the State selected "Approved" in the Internal Use Only section of the form).
- Denied
  - The application has a status of "Denied" when the State has denied the application (i.e., the State selected "Denied" in the Internal Use Only section of the form).
  - If the application is "Denied", it can no longer be modified by the Sponsor. Only the State can change the status of the application.
  - When setting the application status to "Denied", the State should enter a comment in the Comments to Sponsor field explaining the reason the application was denied.
- Returned for Correction
  - The application has a status of "Returned for Correction" when the State has identified errors in the application and has selected "Returned for Correction" in the Internal Use Only section of the form.
  - When setting the application status to "Returned for Correction", the State should enter a comment in the Comments to Sponsor field explaining the reason the application was returned.
- Withdrawn
  - The application has a status of "Withdrawn" when the State has selected "Withdrawn" in the Internal Use Only section of the form.
  - If the Application Packet has ever been approved, there will not be an option to withdraw.

Claim Statuses

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

- Not Eligible
  - The claim has a status of “Not Eligible” when there is an application condition that is preventing claiming for the selected month (e.g., Sponsor or site is not authorized on the Application Packet to operate for the selected month or the Application Packet status is not “Approved”).
- Incomplete
  - The claim has a status of “Incomplete” when the claim has been created in the system but the **Save** button was never clicked (e.g., timeout, logout, etc.). The system saves the data that has been entered, but no edits have been performed.
- Error
  - The claim has a status of “Error” when the claim has been submitted and has business rule violations.
- Pending
  - The claim has a status of “Pending” when the claim has been saved and on-line edits have been performed, but the claim has not been submitted and validated with additional edits (e.g., 15/30 days edit, etc.).
  - Applicable only when the Sponsor is participating in Sponsor-level claiming.
- Validated
  - This site claim has a status of “Validated” when the site claim has been entered, validated, and contains no errors.
  - Applicable only when the Sponsor is participating in site-level claiming.
- Accepted
  - The claim has a status of “Accepted” when the claim has passed all on-line edits and additional edits (e.g., 15/30 days edit, etc.), and is ready to be included in the payment tracking process.
  - The claim can still be modified. A revision is not necessary until the claim is included by the State in a batch payment process.
- Accepted*
  - The claim has a status of “Accepted*” when the claim has been selected by the State for inclusion in the batch payment process; however, the batch process has not run.
  - The claim cannot be modified. If the claim requires a change, a revised claim must be submitted.
- Processed
  - Claim has been fully processed by PDE and has been sent to the State’s Accounting Office for disbursement of funds.