SIS 2000+ Training Manual

Enter an Application

Best viewed using the following Display Properties:
Color greater then 256
Display Resolution greater then 800 x 600

Purpose

This program is used to create and maintain Food Service Eligibility Applications. Student pay types generated by Applications are referenced for school and district eligibility figures.

Training Objectives

Complete a New Application
Complete Application Information
Enter Household Students
Designate an Application as containing one or more Categorically Approved Household Students
Designate a Household Student as a Foster Child
Enter Household Student Income
Enter the Applicant
Enter Household Members
Calculate Application

Find an Application

Edit an Application
Understand the consequences of altering application effective/expire dates, and how the Application Preference *Retroactive Days* controls this procedure

Understand *when* an Application should be edited and *when* the Re-Apply procedure should be used

Override a student(s) pay type on the Application

Override the Application Status and assign a Temporary Status to the Application

Understand the **Application Edit Log** and **Edit Log User Notes**

Understand **Application Notes**

Application Re-Apply
Understand how to use the Application Re-Apply process and complete the Application Re-Apply procedure

Understand *when* an Application should be edited and when the Re-Apply procedure should be used

Training Objectives (continued)

Delete an application
Understand when it is appropriate to Delete an application and when the Re-Apply procedure should be followed.

Understand **Income Based eligibility and Categorically Approved eligibility**

Understand **Split Status Applications**

Print an Application

Pre-requisites

A district-wide database is preferred
Food Service Application Preferences should be customized to ensure performance conforms to local requirements
Income Guidelines Table **must** be current
Eligibility Letters text should be evaluated and customized

Accessing Food Service Applications

From the SchoolNet Main Menu, click on the Food Service button. From the Food Services menu click on the **Application** button (or Alt-I on the keyboard).

For further information refer to Help:

Available through the NeTel website at:
http://www.netel.com/webdoc/default/htm

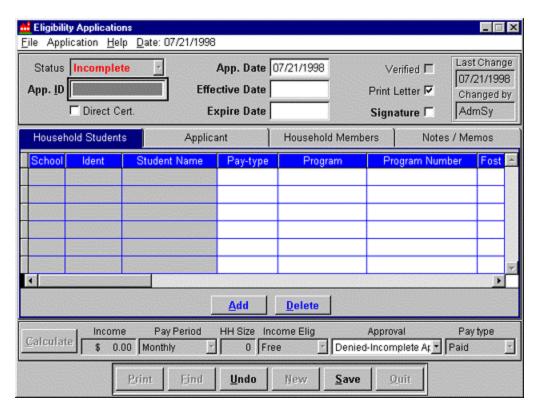# Tasks

Complete a New Application

Fig. 1 – New application

With the Applications module opened in read-only mode, click on the **New** button to present a blank application form (Fig. 1)

1. Complete Application Information

Fig. 2 – Application Information

Move through the fields by pressing the Tab key. The Information portion of the application consists of the following (Fig. 2):

Complete a New Application (continued)

Status -
>Read-only field that defaults to *Incomplete* for new applications. After the application has been completed and calculated, **Status** changes to reflect results.

App. ID -
>User-defined alpha-numeric field. After the initial application is saved for the current session of entering applications, the ID number increments to the next in sequence as a *proposed* ID number. May be overridden. ***Required***

Direct Cert. -
>Place a check mark to indicate this application contains one or more students who qualify for Direct Certification to receive benefits.

App. Date -
>Defaults to Today's Date but may be changed. **App. Date** only signifies *the application processing date*. ***Required***

Effective Date -
>*First* day this application is in effect. The date the pay type(s) generated by this application are in effect. ***Required***

Expire Date -
>*Last* day this application is in effect. The date the pay types(s) generated by this application expire. Application *effective* and *expire* dates are inclusive. ***Required***

Verified -
>Read-only check box, defaults to *unchecked*. A checkmark is inserted after an application has been selected for verification. Verified applications are excluded from future samples. The Verified check box is read-only.

Print Letter -
>*Active* check box that defaults to *checked* for a new application to include this application in the next eligibility letter printing run. After printing this check box is unchecked to exclude from future printing runs. However, **Print Letter** may be re-checked at any time to include in the next printing run.

Signature -
>Indicates that the application contains the applicant's signature. ***Required***
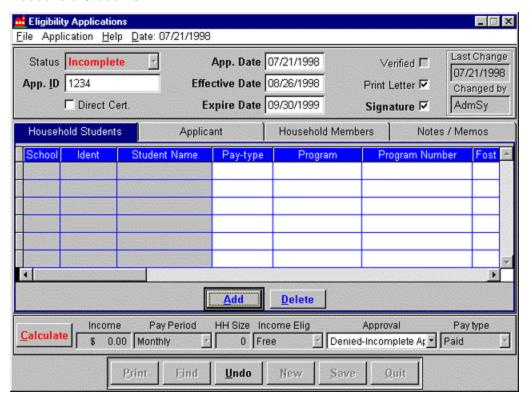
2. Household Students

Fig. 3 – Household Student page

2.1 Add Household Students to the Application

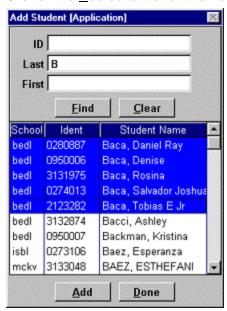Click on the **Add** button to run the Add Student (Application) utility (Fig. 4).

Fig. 4 – Add Students

Complete a New Application (continued)

Enter student name and/or ID search parameters and click on the **Find** button

Select student(s) by highlighting a name from the list of names produced by the **Find** procedure. Hold down the **Shift** or **Ctrl** key to select multiple names. Click on the **Add** button to add these student(s) to the application. As each student is placed into the application, effective and expire dates are evaluated to confirm that the student is not already present on a different application for the same date range before adding that student to a new application.

Click on the **Done** button to return to the Household Students page.

2.2 Complete Household Student Application Information
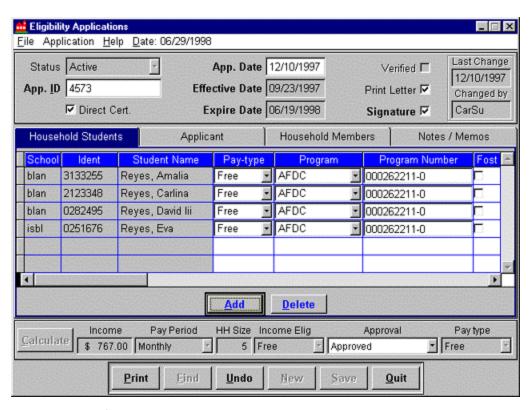

Fig. 5 – Household Student information

Household students are inserted into the application with *School*, *Ident* and *Student Name* read-only. Complete the following fields as appropriate (Fig. 5):

Pay-type -
Defaults to *Paid*, which adjusts to reflect the results of application Calculation.
Program -
Defaults to *Income Based*, which indicates that the student's eligibility is based upon household income only. If one or more students are eligible due to participation in a government program, change *Income Based* eligibility to the appropriate *Program* (AFDC, Food Stamps, FDPIR - Fig. 6). **Any Program setting other than Income Based**

Complete a New Application (continued)

automatically assigns a Pay Type of FREE. Any Program setting other than Income Based **must** be accompanied by a **Program Number** to receive this Free status. A Program other than Income Based indicates this student is *Categorically Approved* to receive Free or Reduced price meals. An application containing one or more Categorically Approved students must still contain an Applicant and the Applicant Signature.

Program Number -
Required entry when *Program* is other than Income Based. If a Program number is not present for a Program, the application status will be *Denied-Incomplete* after calculation.
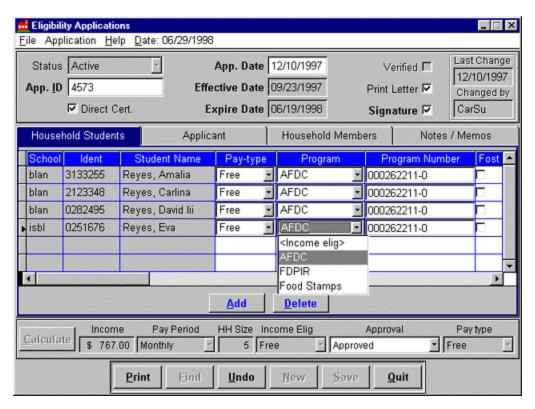
Fig. 6 – Select Household Student *Program*

Foster -
A descriptor that marks a student as a Foster Child for reporting purposes. An application for a Foster Child should be processed as a "Household-size 1". A Foster child is not automatically eligible to receive free meals.

Complete a New Application (continued)

Enter Household Student Income -

If student income is reported, *both* the amount and the pay period must be present. Student income is *included* in total Household Income. Use the horizontal scroll bar to display student income fields.
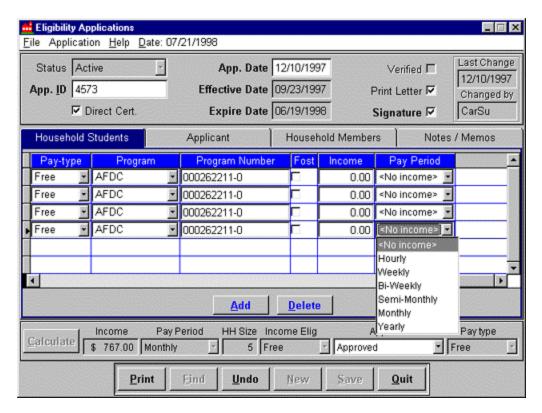

Fig. 7 – Student Income fields
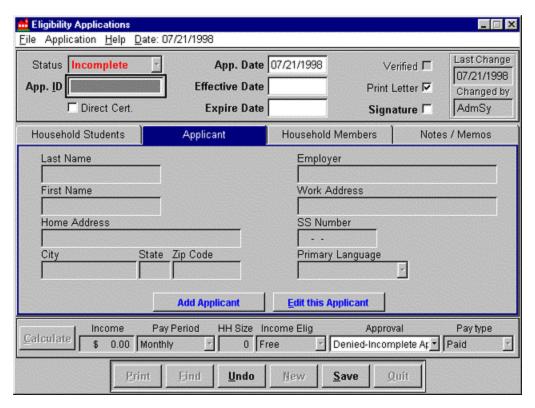
3. **Enter Applicant**
    Move to the Applicant tab

Fig. 8 – Add Applicant

Click on the **Add Applicant** button
Select the Applicant from among existing Student Contacts or add **new** Student Contact as
Contact/Food Service Applicant
   Add a New Student Contact as the Food Service Applicant:
   Click on the **New** button
   Complete required Student Contact/FS Applicant data. Contact address and primary
   language must be present (referenced by Eligibility Letters).
   Click on the **Save** button
   Click on the **Done** button

4. Enter Household Members
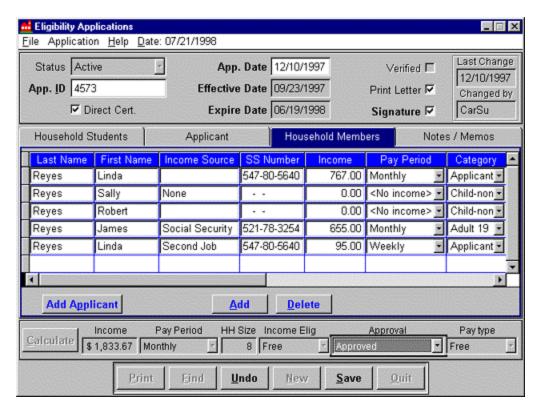   Move to the Household Members tab

Fig. 9 – Add Household Members to the application

Click on the **Add Applicant** button to add the Applicant as a Household Member (remember, an applicant is not necessarily a household member).

Complete *required Applicant Household Member* data:
    Social Security Number –
        This field may contain the word "*none*" instead of a numeric entry. It may not be left
        blank for the Applicant.
    Income (if reported) -
        Income amount
        Pay Period
    Category –
        (Add Applicant automatically inserts Applicant status into Category)

    Click on the **Add** button to add each additional household member to the application
    Complete required Household Member data:
        Name -
        Income (if reported) -
            Income amount
            Pay Period

Time Saver – Place " (quotes) in a name field -- the name in the field directly above will be replicated into this field.

Hints* a Household member reports more than one source of income –
> A Household member may be present more than once **IF** the name is spelled identically each time. Any variation in spelling will result in that individual being counted as an additional household member.

5. **Calculate an Application**

Click on the **Calculate** button
Evaluate application Income Elig (the application status based upon calculation), Application Approval and Pay type (student pay types assigned by the application) (Fig. 10).

Fig. 10 – Application status

Override Application Approval Status –
Application Approval may be overridden and changed to Temporary Approved 30-60-90. Click on Approval drop down list box, then select the override Approval Status (Temporary 10-30-60-90 days, etc.).

Override Student Pay types generated by the Application Approval Status –
Individual Student pay types may be overridden and changed to other than the application Pay type.

From the Household Students page, edit mode – click on the pay type drop down list box for the student to receive the override status. When a pay type is selected that differs from the application status, that student and pay type displays in red type.

Notes: A Denied/Incomplete Application sets Student Pay Types to "Paid". If you override the Application Approval Status and change it to Temporary Approved, student pay types automatically change to the Application "Pay type" status.

Denied-Incomplete application status – Causes
> Missing applicant signature
> Missing student Program number
> Missing student Program
> Missing Applicant social security number (Household Members page)
> Missing Pay Period for a student, applicant or household member income source.
> Missing application ID number

6. **Save** data

Understand Income based eligibility and Categorical eligibility

Income-based eligibility –
> Application and Student free/reduced/paid status are determined solely by comparing household size and household income with Federal Income Guidelines.

Categorically Approved –
> Student free or reduced price meal status results from the student qualifying for Program benefits, such as AFDC, Food Stamps, or FDPIR. In these cases each student possesses a Program ID number. It is possible for an application to contain both students who qualify for free meals due to Program benefits, and students who qualify for income based benefits (pay types may differ).

Direct Certification –
> Direct notification from the government agency is received by the district that students are categorically approved to receive free or reduced price meals. No proof of program participation is required of the household.

Split Pay type Applications

Application **Split pay types** occur when an application contains one or more students assigned a pay type that is other than the application pay type (Fig. 11).
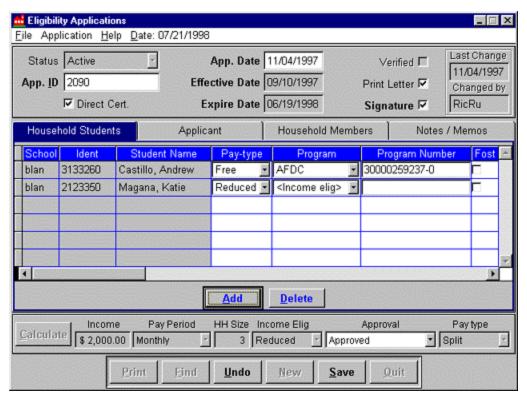

Fig. 11 – Application with Split Pay type

Scenario:
Two families occupy one home and constitute one economic unit. Family A is covered by AFDC benefits, family B does not receive AFDC benefits but does receive income.

Split Pay type Applications (continued)

The household application includes income for all household members (both families). The application household size includes both families.

The application calculates as qualifying for Reduced price meals based on household size and income. The student in Family B is _Income eligible_, and receives the pay type Reduced (application is income based and qualifies for Reduced).

The student in family A is assigned to the Program AFDC, and has a Program ID number. This automatically qualifies this student as _Categorically Approved_ and eligible to receive _Free_ meals.

The application status is _Income elig Reduced_. It contains students with Reduced pay types and Free pay types. The application Pay Type is Split.

Print an Application

The **Print** button is enabled when a saved application is in read-only and edit modes. If unsaved changes are present, **Save** must be executed before the **Print** button will be enabled. The Print command sends the report directly to the printer.

Find an Application

The Find utility allows applications to be located by using a student name, an applicant name, or the application ID number. The **Find** button is enabled when *Applications* is in read-only mode.

1. Click on the **Find** button
2. Enter Search parameters – part or all of a student name or ID number, part or all of the applicant name, or part or all of the application number.
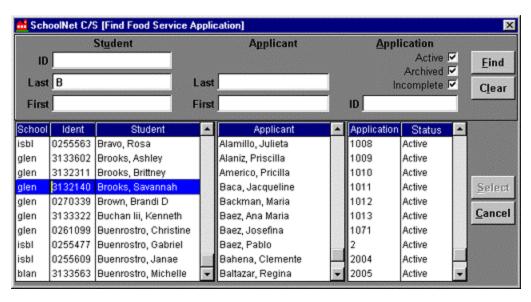
Note** **% = All** in any of these fields

Fig. 12 – Find an application

3. Click on the **Find** button (Fig. 12)
4. Double-click on the student name, the applicant name, or the application ID number to locate the application, the applicant and all students present on the application (Fig. 13).

5. If this is the correct application, highlight (single-click) on the **Application**, then click on the **Select** button (Fig. 13) to select that application.
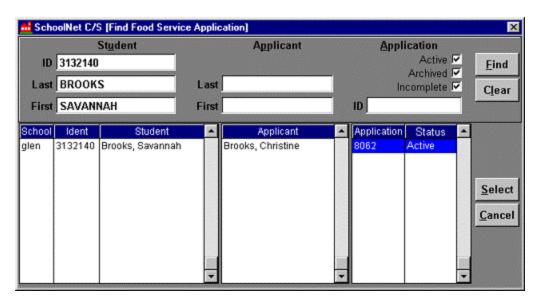

Fig. 13 – Select application

6. The *Active*, *Archived* and *Incomplete* check boxes allow you to define by status which applications are to be included in the search.
7. Use the **Clear** button to remove search parameters.
8. Use the **Cancel** button to exit the *Find* utility and return to Applications.

Edit an Application

When to Edit

1. Correct a data entry error
2. Change the effective and/or expire dates of the application to make an application effective retroactively or to extend benefits.

    1. If meal records are present for the retroactive period, these records will be changed to reflect the pay type authorized by the application for this period of time. Account balances are corrected to reflect the change in meal rates. Edit logs for these changes are created in Accounts for each student on the application.
    2. Food Service Preference *Retroactive Days* controls how many days *from the application effective date* that the application may be made retroactive (meal records will be changed).

When to Re-Apply

1. A change in household size or income requires a new application
2. Student(s) have exited the district, then returned after the allowable period of time. Even though the existing application may contain effective and expire dates that are appropriate, usual policy requires the family to Re-Apply.

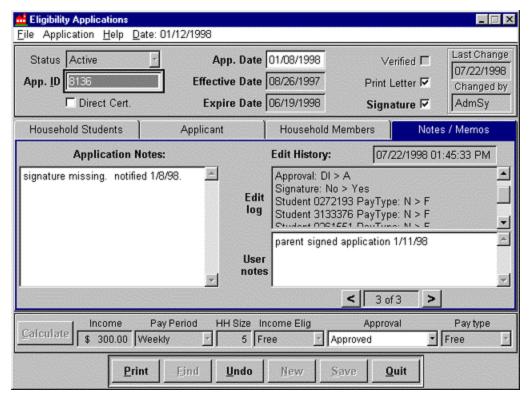## *Application Edit History and Application Notes*

Fig. 14 – Application Edit log, User notes and Application notes

Edit History – Edit log
Each time an application is edited and *saved*, a read-only system Edit log entry is created that records what was changed, what it was changed to, the date of the change, and *changed by*. Each Edit log has vertical scroll bars. Use the VCR buttons to scroll through the Edit logs for this application (3 of 3, above).

Edit History – User notes
A user-definable text field is associated with each Edit log to permit additional information regarding the Edit log. Each User notes has vertical scroll bars.

Application Notes
Each application contains a user-definable text field for general information about this application. Application Notes may be included as a merge field used in Eligibility Letters & Labels.

Application Re-Apply

When to Re-Apply

1. A change in household size or income requires a new application.
2. Student(s) have exited the district, then returned after the allowable period of time. Even though the existing application may contain effective and expire dates that are appropriate, usual policy requires the family to submit a new application (Re-Apply).

1. Click on the **Find** button to run the **Find Application** feature.
2. Locate the application requiring re-application
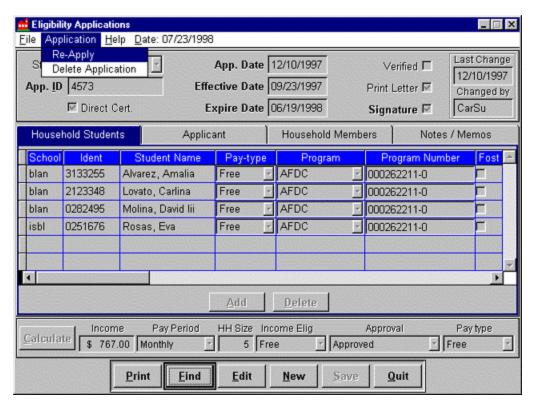3. Click on **Application** (Fig. 15, Application Menu bar)

Fig. 15 – Application Re-Apply

4. Click on **Re-Apply** to open the Re-Application screen (Fig. 16).

Application Re-Apply (continued)

Fig. 16 – Application Re-Apply screen

5. **Enter required data** -
> **Existing** application data
>> Expire Date
>
> **New** application data
>> Application # (defaults to the ID number of the existing application followed by a user-defined suffix (the suffix is an Eligibility Preference)
>> Effective Date
>> Expire Date

6. Click on the **Proceed** button
> The **New** (replacement application) Application is displayed
> Edit data to reflect change in Household status that required re-application.
> Click on **Calculate**
> Verify results and **Save**

Notes: The Re-application utility replicates and then expires the current application. The **New** application (replicated application) contains all the household information that was present on the previous application, with new effective and expire dates.

Delete an application

An application may be deleted when you wish to discard an application that has **never** been in effect.

Since applications are never expired within this system (applications are always *Active* within their specified effective date ranges), applications that have been replaced (through Re-application) are *retained* to permit historical reporting and to provide an eligibility history for students.
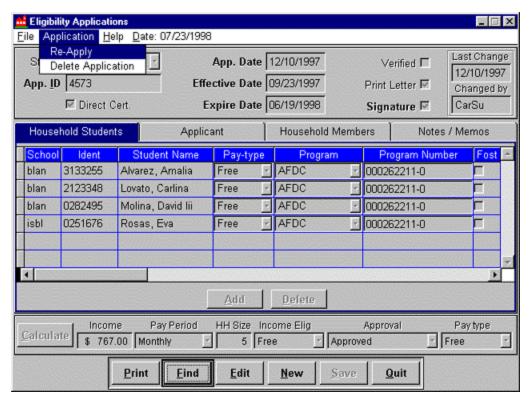

Fig. 17 – Application menu, Delete Application

1. Use the **Find** utility to locate the application you wish to delete.
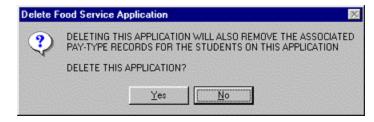2. Open the **Application** menu
3. Click on **Delete Application**

Fig. 18 – Delete Application confirmation prompt

Delete an application (continued)

4. The confirmation prompt states that if this application is deleted, any student pay-types generated by the application will be removed. If these students are currently active in the school/district, they will be assigned default pay types of "Paid".
5. Select "Yes" from the confirmation prompt to continue, "No" to abort.