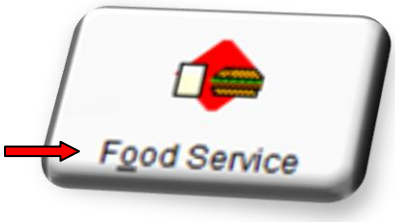
Utah STATE OFFICE of Education

Food Service

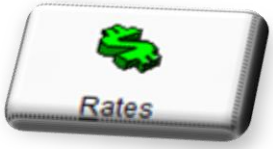
Food Service



Food Service Module

Select - **Administration** – Module

Select – **Rates** - Module

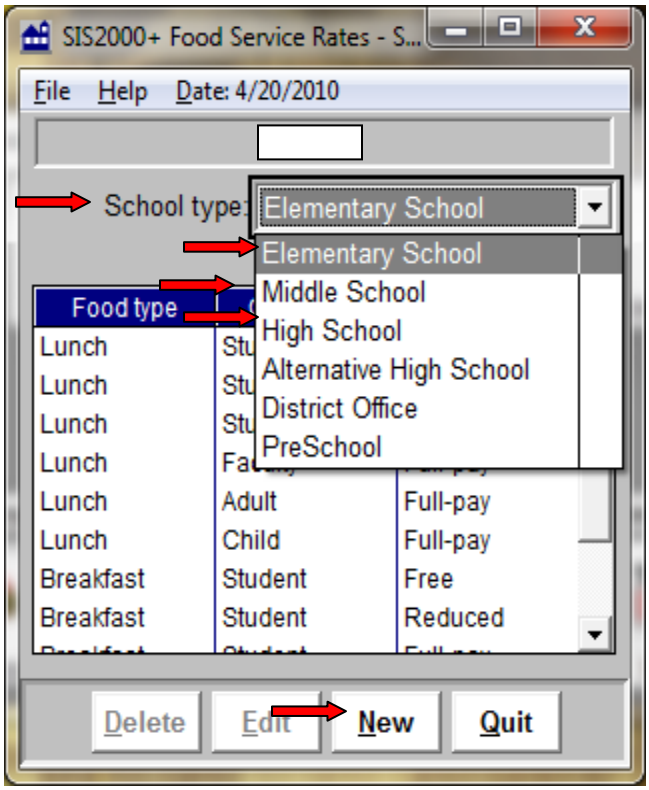


Rates Module

Lunch and **Breakfast Rates** are tied to **School Types**.

School Types Setup:

If you only have one **School Type** (**Elementary, Middle School,** or **Secondary**), you only need to setup one **School Type**. If you have more than one, setup all that apply to your LEA.



Select the **School Type** that your LEA will be using. If your LEA is an **Elementary School** – Select **Elementary School from the drop-down menu**

Select - **New:**

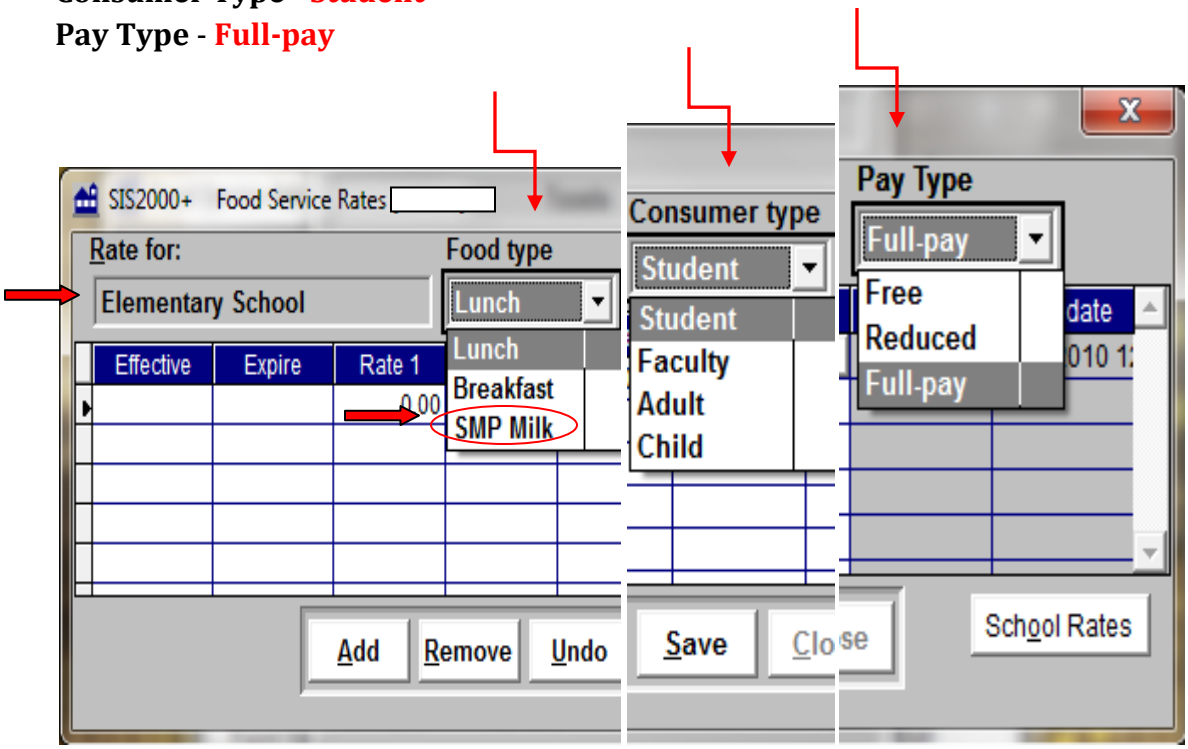
Each **Food Type**, **Consumer Type**, and **Pay Type** is selected each time a new **Rate** is setup.

SMP Milk is listed in the Food Type List

SMP Milk is only used if you participate in the **Special Milk Program (SMP MILK).**
SMP Milk is a reimbursable Milk Item.
To use SMP Milk – contact **Child Nutrition Services** at USOE at (801) 538-7680 for more information, otherwise do not set it up.

Elementary School Type - Setup

Rate for: Elementary School is selected
Food Type - Lunch
Consumer Type - Student
Pay Type - Full-pay



Food Type, **Consumer Type**, and **Pay Type** have drop-down menus for flexibility for selecting different Rate options.

Do **not** enter an **Effective** date **at this time**.

Rate 1 - **Reimbursable Rate** turned in for reimbursements.

Put in the amount you will charge students for **Full pay** Lunch.

Rate 2 - student(s) who eat a second meal or Faculty, Child, Worker, or Patron(s). These meal rates are not reimbursable. This is an optional field. If you do not serve second meals, etc. just leave it at 0.00.

Rate 2 meals can include Full-pay amount **plus** cost to prepare. It can be more depending on what you want to charge. If you have questions about this, contact **Child Nutrition Services** at USOE for more information at (801) 538-7680.

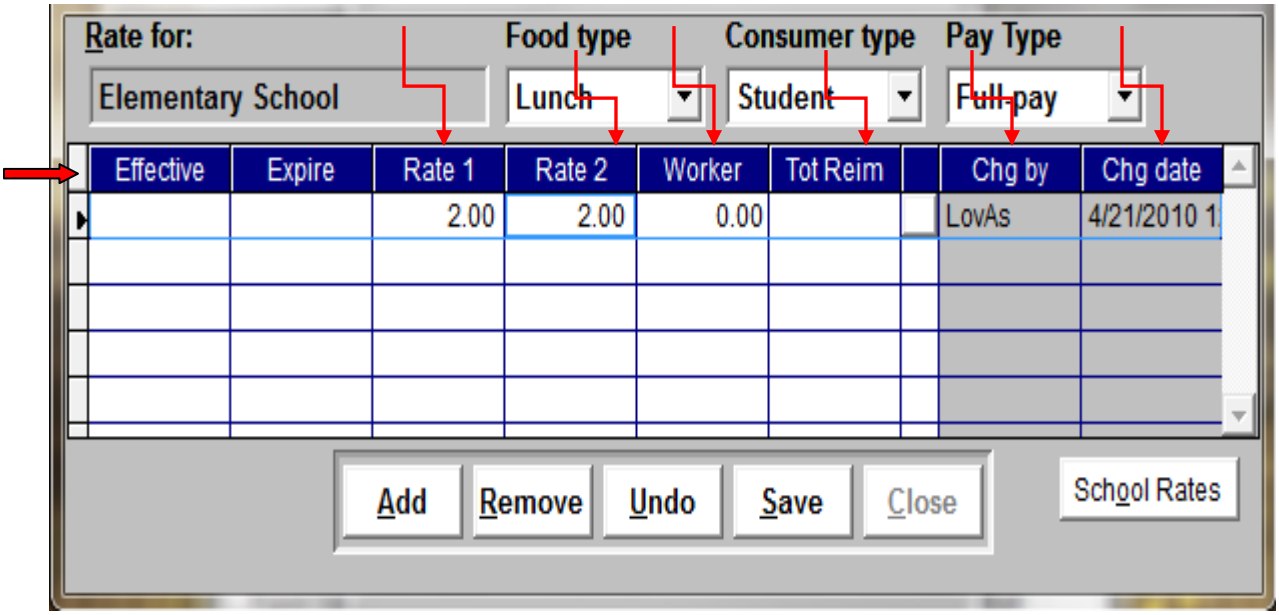
Worker - worker rate (Not reimbursable) - optional field.

If you do not serve worker meals, just leave it at 0.00.

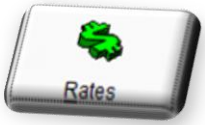
Tot Reim (bursement) leave **blank.**

Chg By ((Data Changed By) – LovAs

Chg Date – 4/21/2010 - (Date the meal Rate was changed)

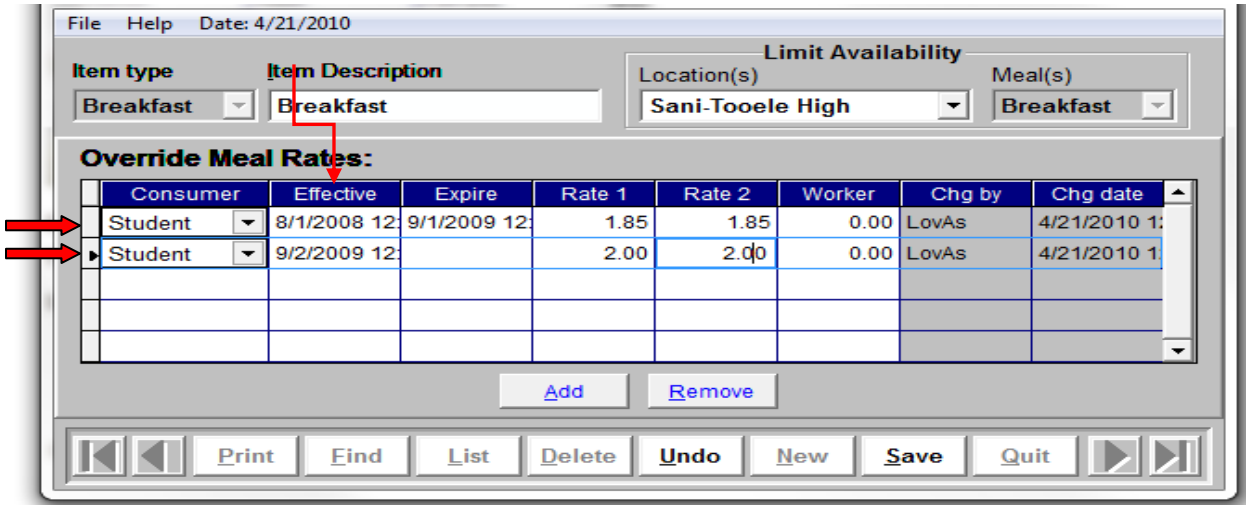


The only time to enter an **Effective** date is when you are going to change rate amounts. Example: If you change a Meal Rate from $1.85 to $2.00 or an ala Carte Item - Milk .25 to .35, etc.



Changing Meal Rates

Select the **Administration** Module / **Items** Module:



Find the **Description** and **Food Type.** Select the **Rate** amount you are going to change.

Select **Edit** –

Select the Item you wish to change the **Rate** for. Put in the Effective date **and** the Expire date. The effective date should be before school started or the first day of school. This rate change will affect the rates by date. The rates are 'date driven'.

A word of caution, if you are not sure how to set this, please contact your USOE SIS2000+ Specialist for help. Changing these rates can be retroactive.

The **new** Effective Date should be entered with the new Rates. The date you want the rate to take affect.

Effective – 8/01/2008 -- Expire -09/01/2009 – **Rate 1** - $1.85

Effective – 9/02/2009 -- Expire – (blank) – **Rate 1** - $2.00

See example above.

Select - Save

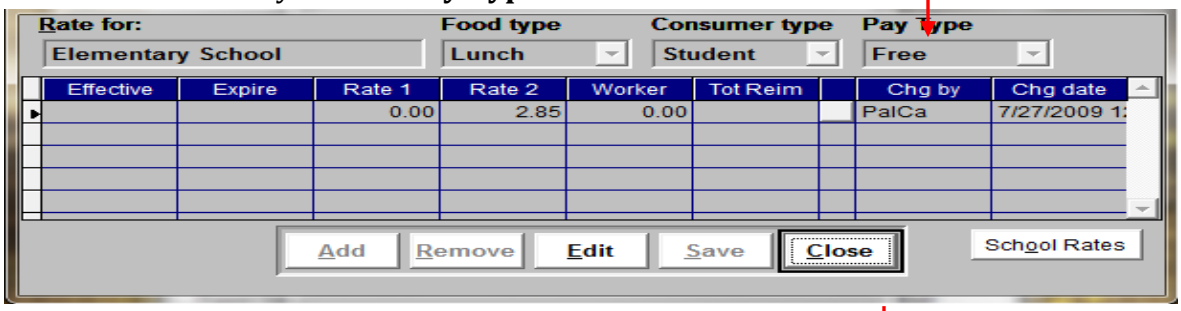
Adding more Meal

Repeat the steps to add more Meal Rates: See examples below:

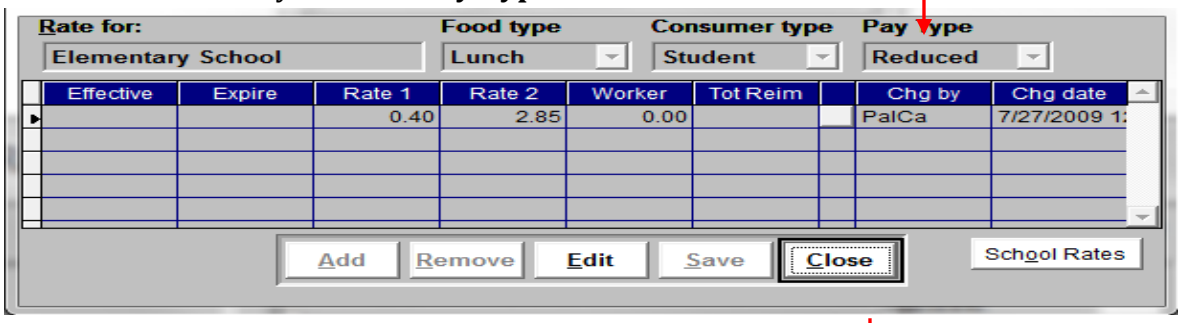
Complete the setup for the following Rates for Lunch:

Food Type - Lunch - Consumer Type - Student - Pay Type –Free
Food Type - Lunch - Consumer Type - Student - Pay Type –Reduced
Food Type - Lunch - Consumer Type Student - Pay Type –Full-pay

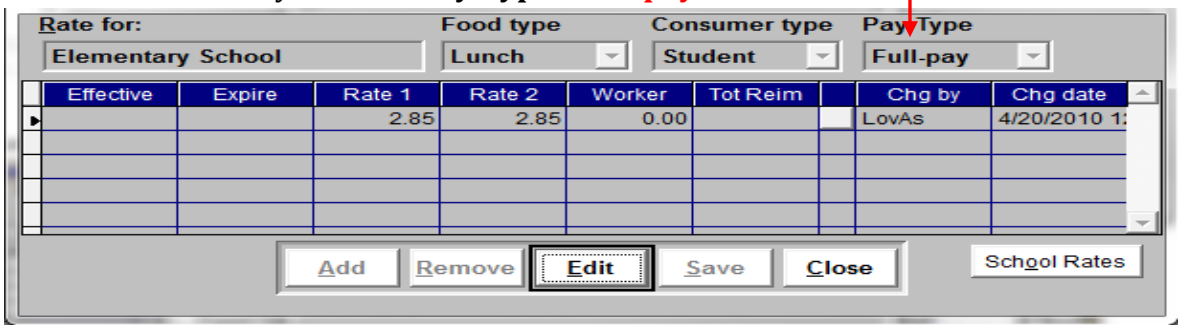
Rate for: Elementary School -**Pay Type**: **Free**



Rate for: Elementary School – **Pay Type: Reduced**



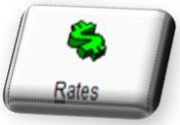
Rate for: Elementary School – **Pay Type**: **Full -pay**



Breakfast Rate for Elementary School Setup

Repeat the steps for Breakfast if you are planning to serve Breakfast.

Food Type - Breakfast - Consumer Type Student - Pay Type - Free
Food Type - Breakfast - Consumer Type - Student - Pay Type – Reduced
Food Type - Breakfast - Consumer Type - Student - Pay Type - Full Pay

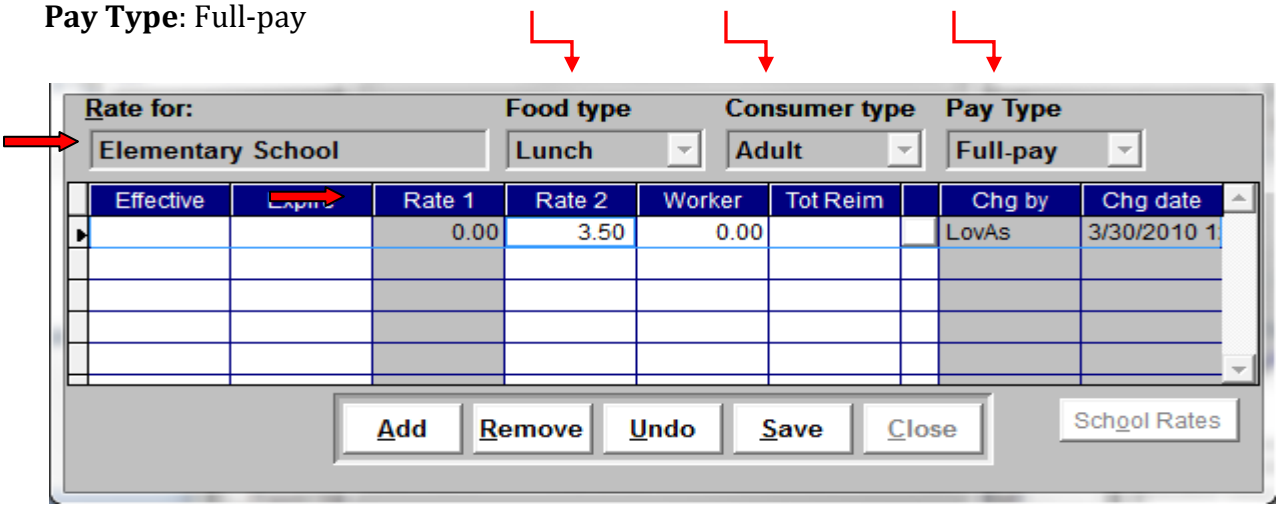
Adult, Worker, Child (Non student) 

<u>Not Reimbursable</u> Rates:

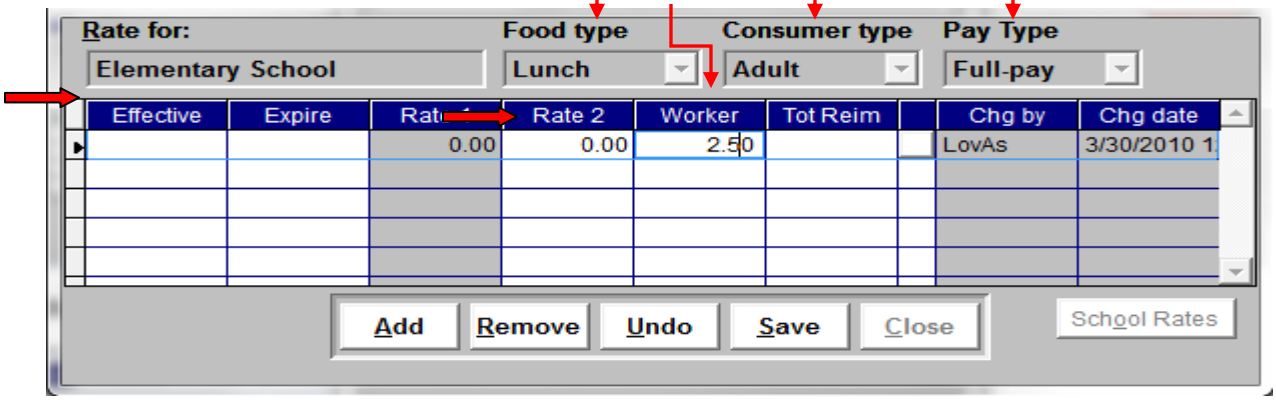
Rates such as: **Faculty, Adult, Child** are optional.
If you will not use them, don't set them up.

Rate 1 is grayed out because **Rate 1** is a reimbursable meal rate. You can't put a reimbursable Rate amount in **Rate 1** field for Faculty and Child lunches, breakfasts, etc. These meal types are **not** reimbursable by the state.

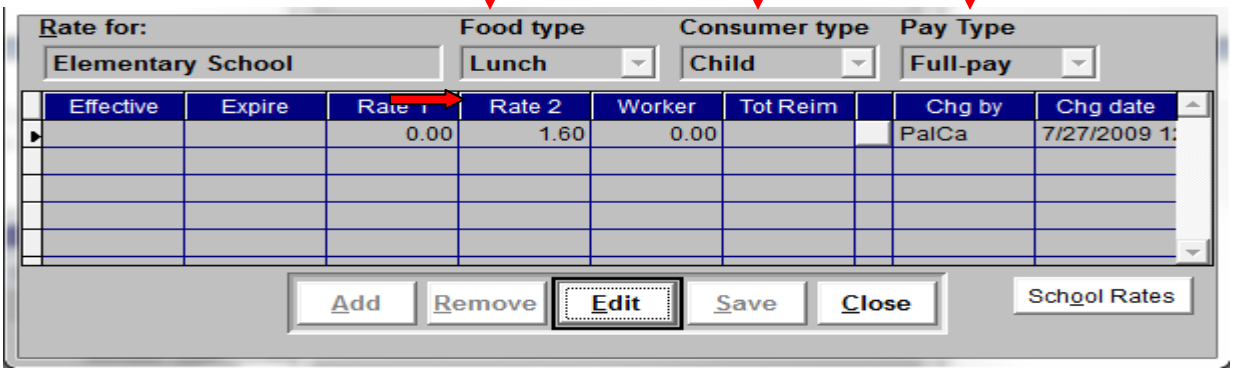
Setup: **Rate for** Elementary School–**Food Type**: Lunch- **Consumer Type**: **Adult** -
Pay Type: Full-pay



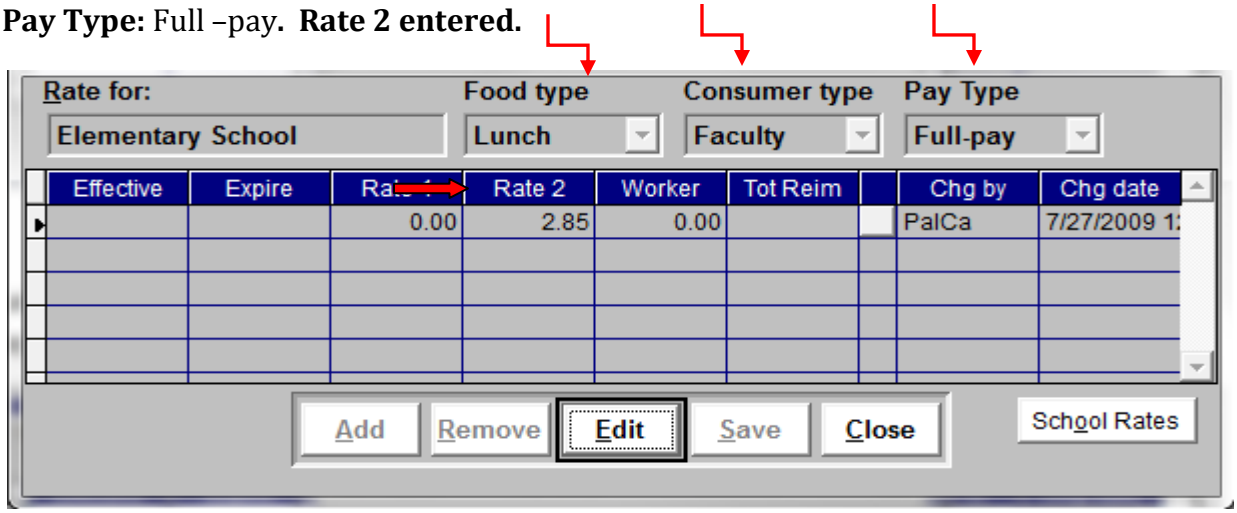
Setup: **Rate for:** Elementary School–**Food Type**: Lunch- **Consumer Type**: **Adult** – Pay -Type: Full –pay for a **Worker**. **Rate 2 entered.**



Setup for: **Rate for:** Elementary School–**Food Type:** Lunch- **Consumer Type:** **Child** - **Pay -Type**: Full –pay for a **Child.** **Rate 2 entered.**

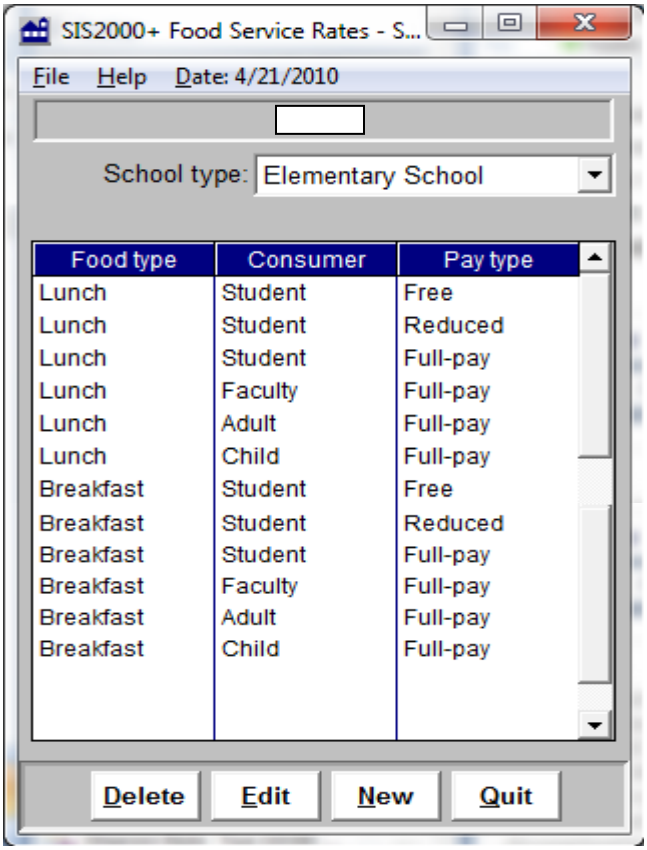


Setup Rate for: Elementary School–**Food Type:** Lunch- **Consumer Type:** **Faculty** – **Pay Type:** Full –pay. **Rate 2 entered.**



After you have added all Meal Rates for your LEA, the list of rates (Food Types) should look similar to the example below:

Your **Rates** List will only include the Rates you created for your LEA.



Items Module

Select Items:

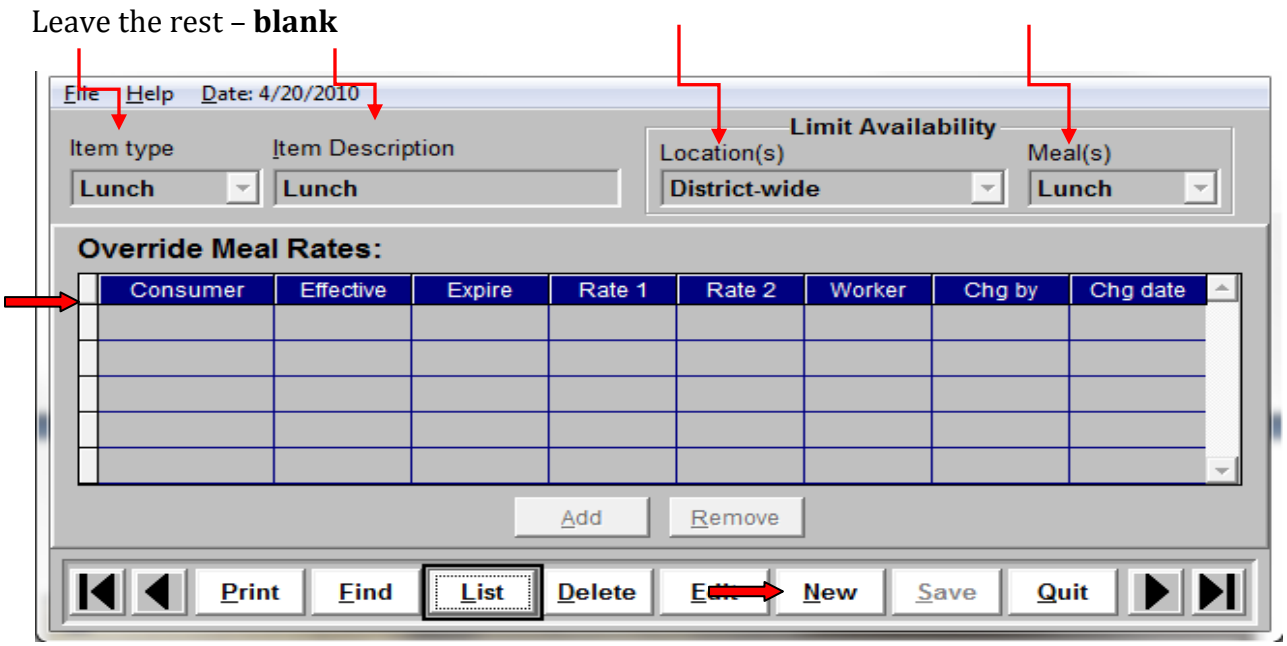
The first **Item** Rate you will create will be a District-wide Rate Item. A District-wide Rate Item needs to be created for every School Type you setup for both Lunch and Breakfast, if you serve Breakfast. This District-wide Rate Item is created even if you only have one school.

Setting up **Lunch Rate District-wide**:

Select - **New**

Item Type –Lunch
Item Description – Lunch
Location(s) – District-wide
Meal(s) – Lunch

Leave the rest – **blank**



If you are not serving Breakfast, you do not need to add Breakfast for a Meal Rate. But if you are going to serve Breakfast –

If you serve Breakfast, you will need to repeat the Setup – **District-wide Rate** for the **Breakfast Item**.

Select - New

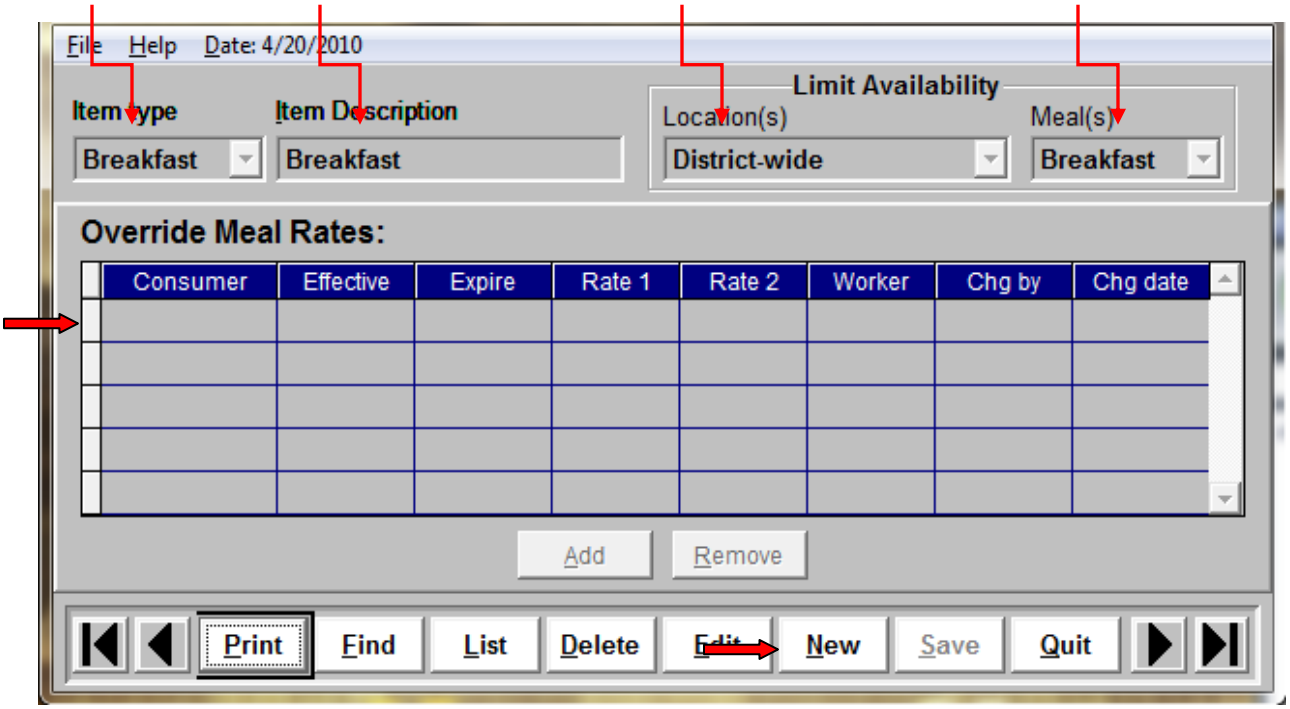
Item Type –Breakfast

Item Description – Breakfast

Location(s) – District-wide

Meal(s) – Breakfast

Enter no Rate amounts or Information – This is the way it needs to be setup to work accurately.



After you have setup the District Wide Rates for Lunch and Breakfast,

Add the ala Carte Items (Milk, Rolls, Salad, etc.) you are going to serve:

Adding ala Carte Item Type:

Ala Carte items are for single purchases. If a student only wants milk or a salad, but not the regular meal, you would select the ala Carte Items.

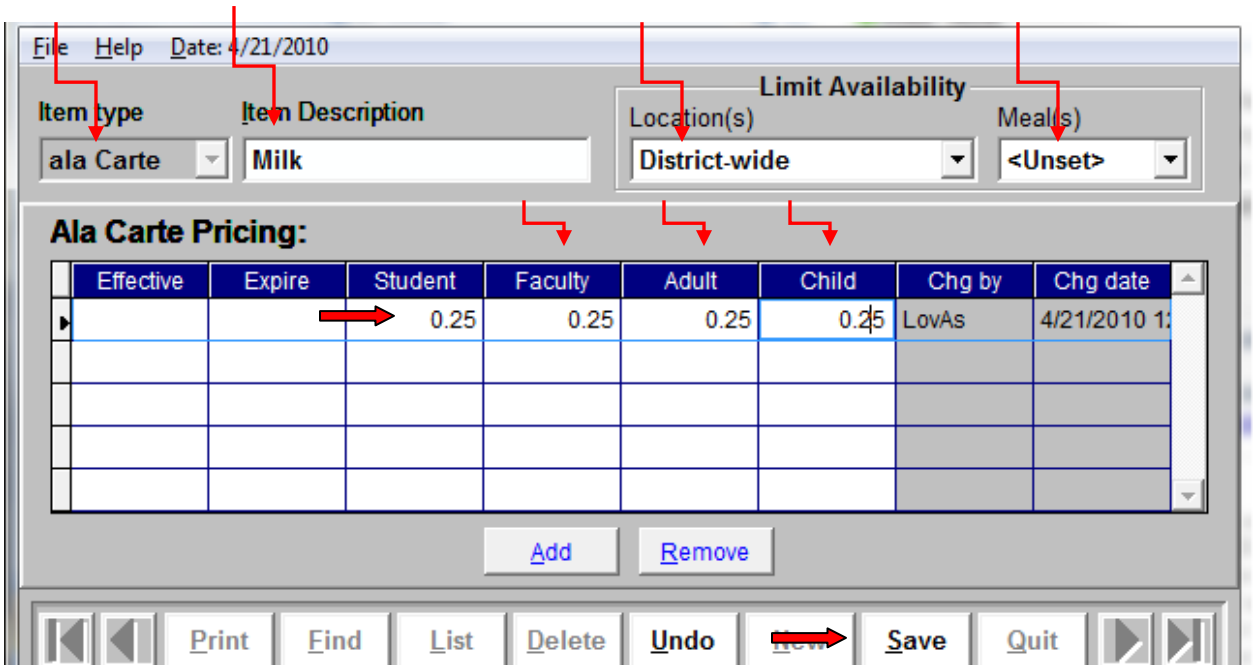
Example: Adding Milk

as an **ala Carte Item**:

Select - **New**

Item Type – **ala Carte**
Item Description – **Milk**
Location – **District-wide**
Meal - **<Unset>** (leave this field unset)

Select **Add**



Add the amount for a single Milk (.25)

You can add the milk amount to Faculty, Adult, or Child or leave Faculty, Adult, and Child at 0.00. This is optional.

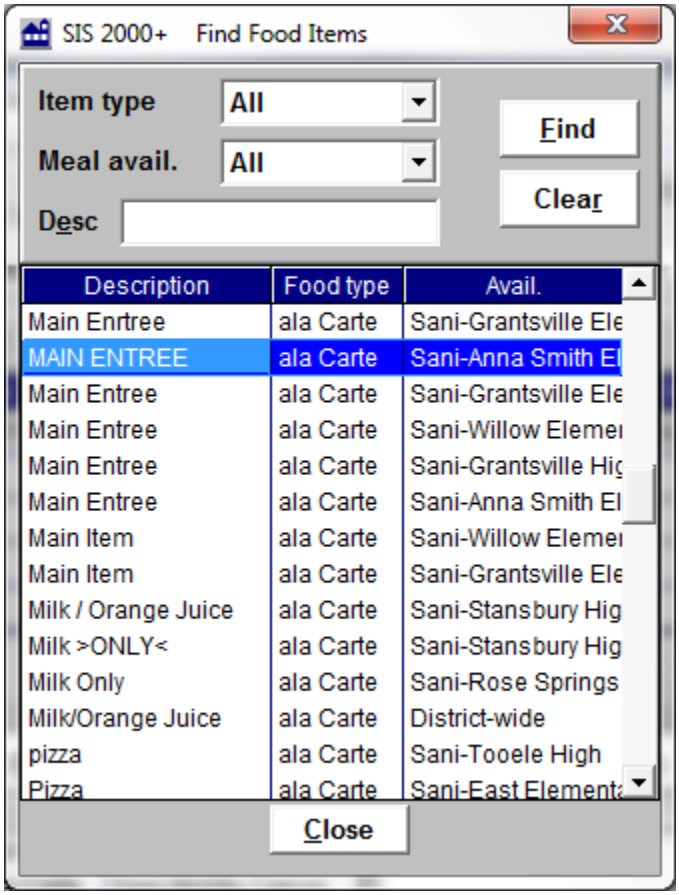
Select - Save

Repeat these steps to add more ala Carte Items.

Some Charters/Districts do not serve anyone but students, so you don't need to add the other consumer types.

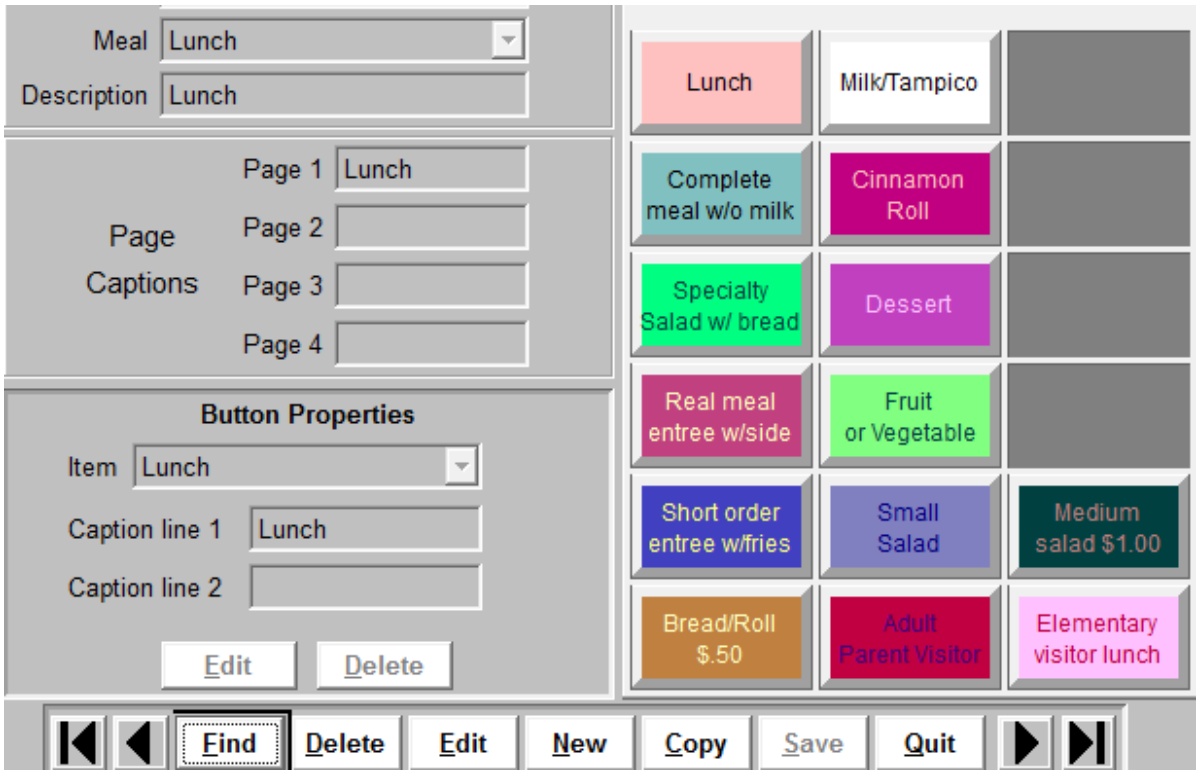
After setting up your ala Carte Items, your list of rates (Food Types) should look similar to the example below:

It will only list the ala Carte Items you have added for your LEA.



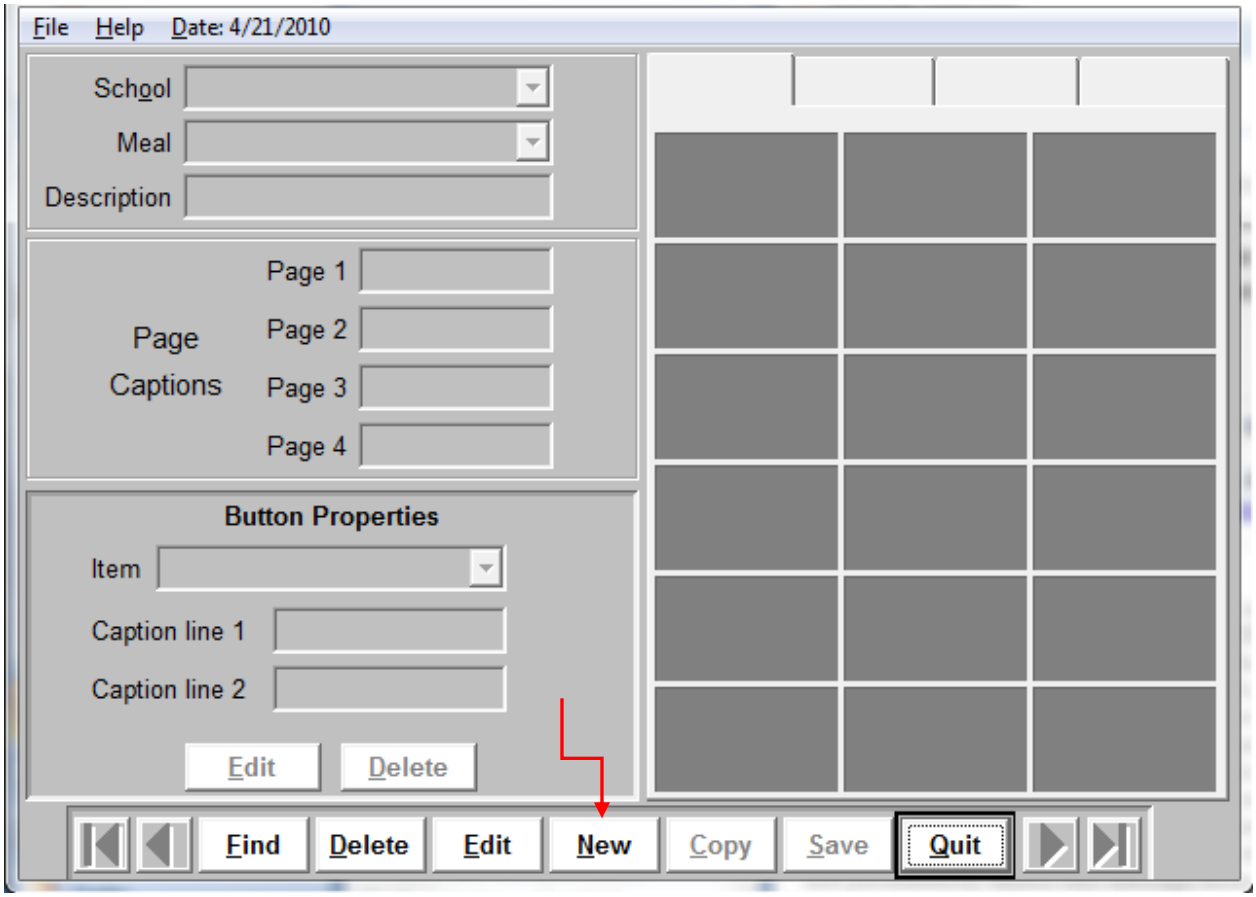
POS Designer Module

Setting up **POS Designer** (**P**oint **O**f **S**ervice)
After creating the **POS Designer** buttons, they will be displayed and used in the **Cafeteria** Module.

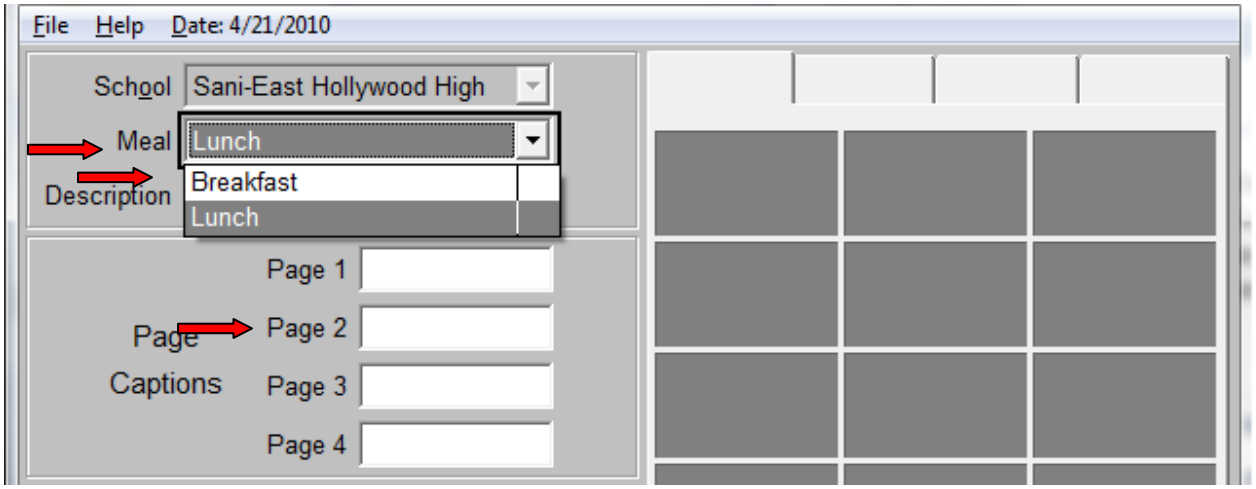


Select - **POS Designer -** Module

Select - **New**



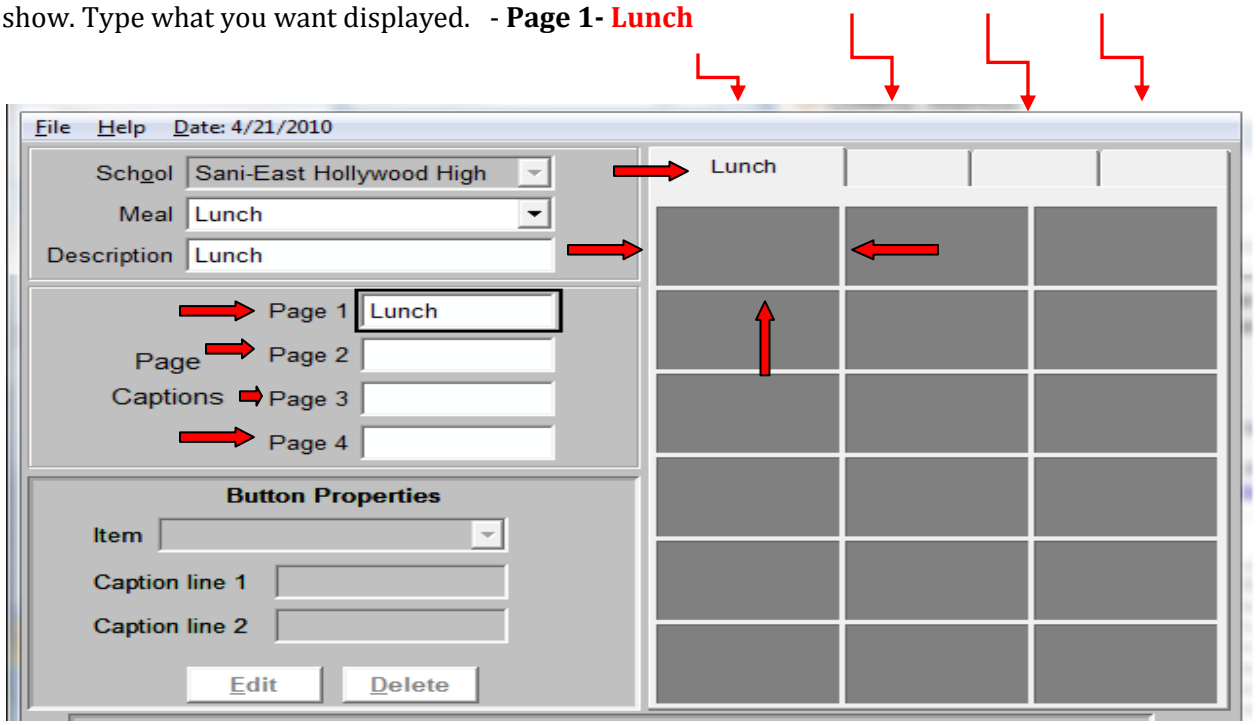
Select **Meal** Type:



Select - Lunch -
Breakfast is setup the same way

Type in **Description** – **Lunch** - This should match the **Meal** Type - **Lunch**

Page 1, Page 2, Page 3, and Page 4 is Tab information displayed across the top where the Tabs show. Type what you want displayed. - **Page 1- Lunch**



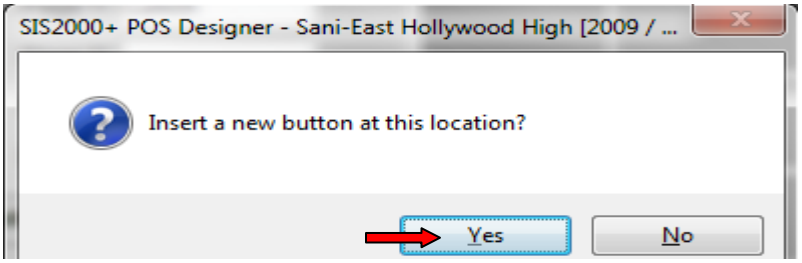
Select - Save

Select – **Edit** to add **POS Design buttons (**displayed and used in the **Cafeteria Module)**

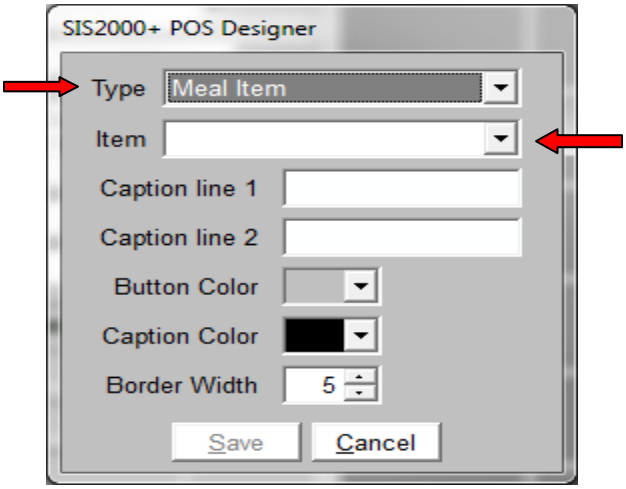
Double Click in the First square on the top – left corner of the grid.

It will ask you if you want to. insert a new button at this location?

Select - **Yes**



POS Designer Button



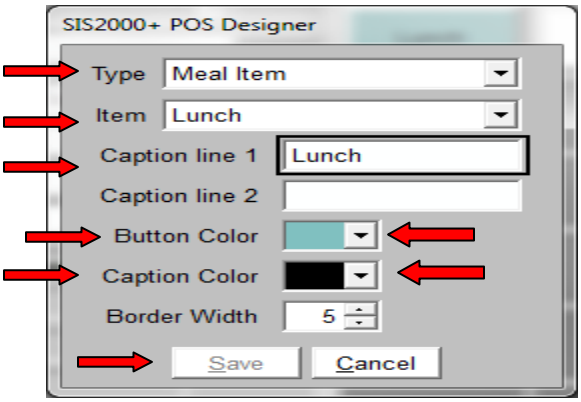
Leave **Type** at – **Meal Item**

Select Item from the drop-down menu: select **Lunch**

Type in Caption Line 1 – **Lunch** (Item and Caption line 1 should match)

Select **Button Color** by selecting the drop-down arrow –select button color

Select **Caption Color** –by selecting the drop-down arrow –select color of the wording

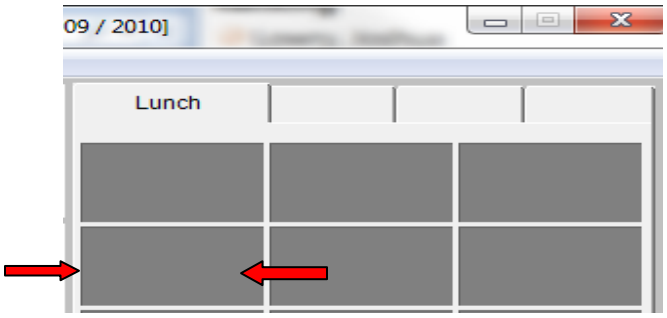


Select - Save

POS Designer button - Milk >Only<:

Select **Edit**

Double click the box on the designer page where you want to add a Milk button:



Select - **Type**: ala Carte Item

Item – Milk (this will be the name of the item(s) you created earlier in the **Items** Module).

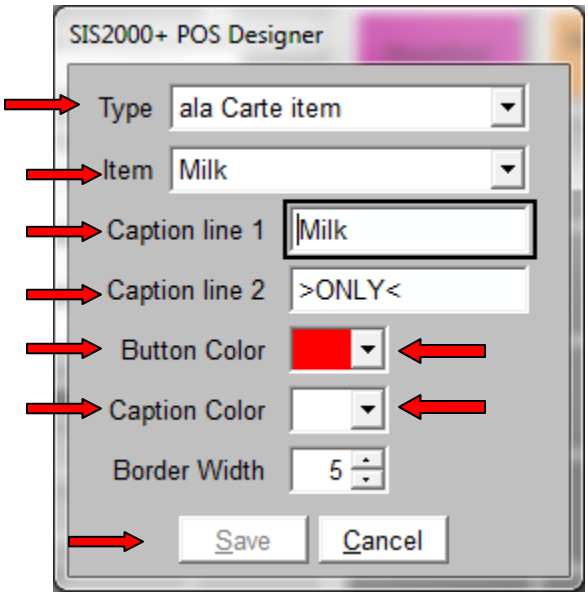
Caption Line 1 – Milk

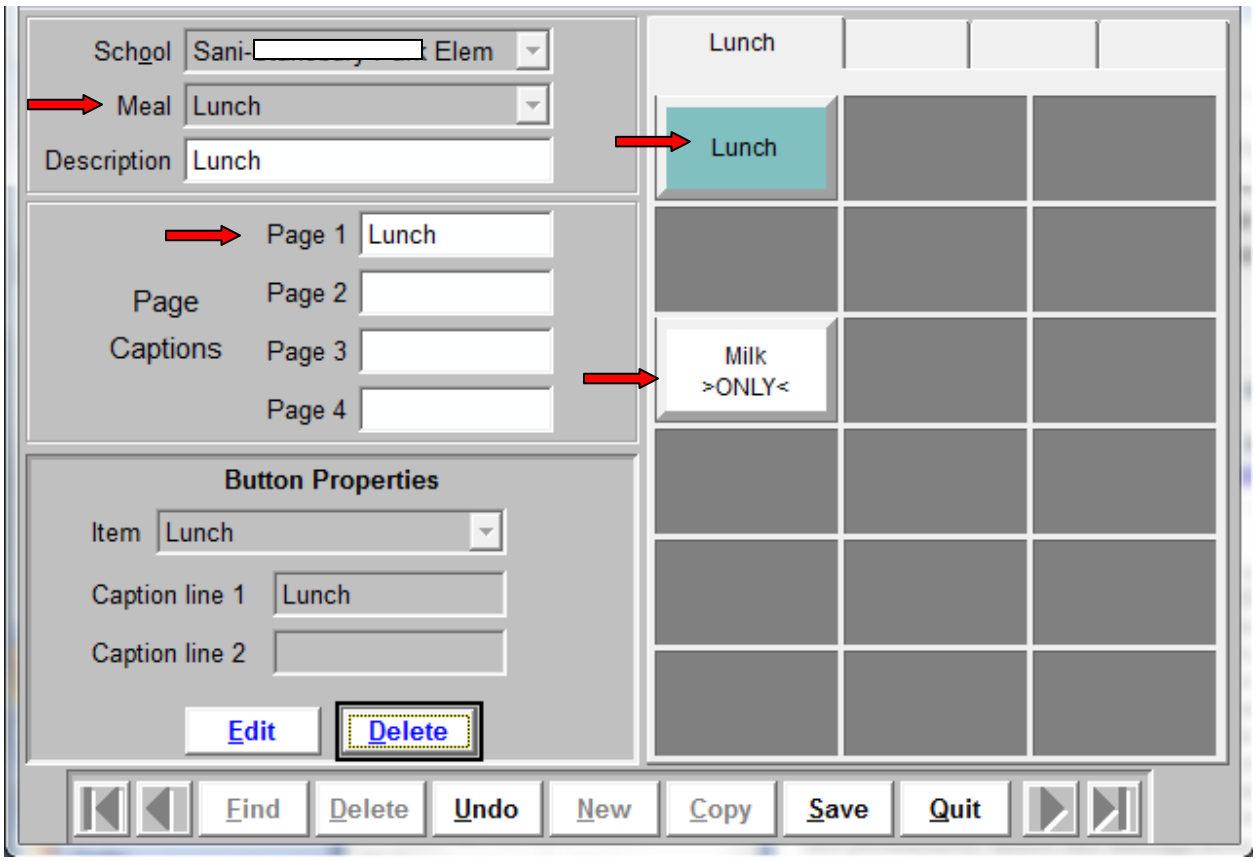
Caption Line 2 - >ONLY<

Select - **Button Color** by selecting the drop-down arrow –button color

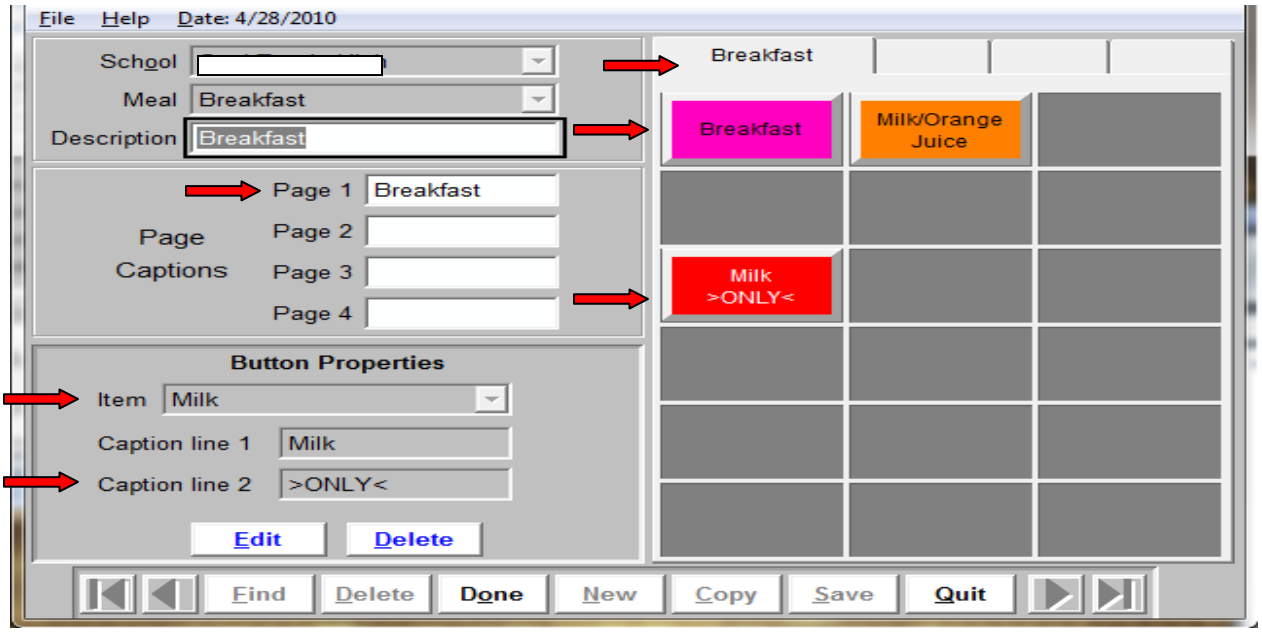
Select - **Caption Color** by selecting the drop-down arrow -color of the wording

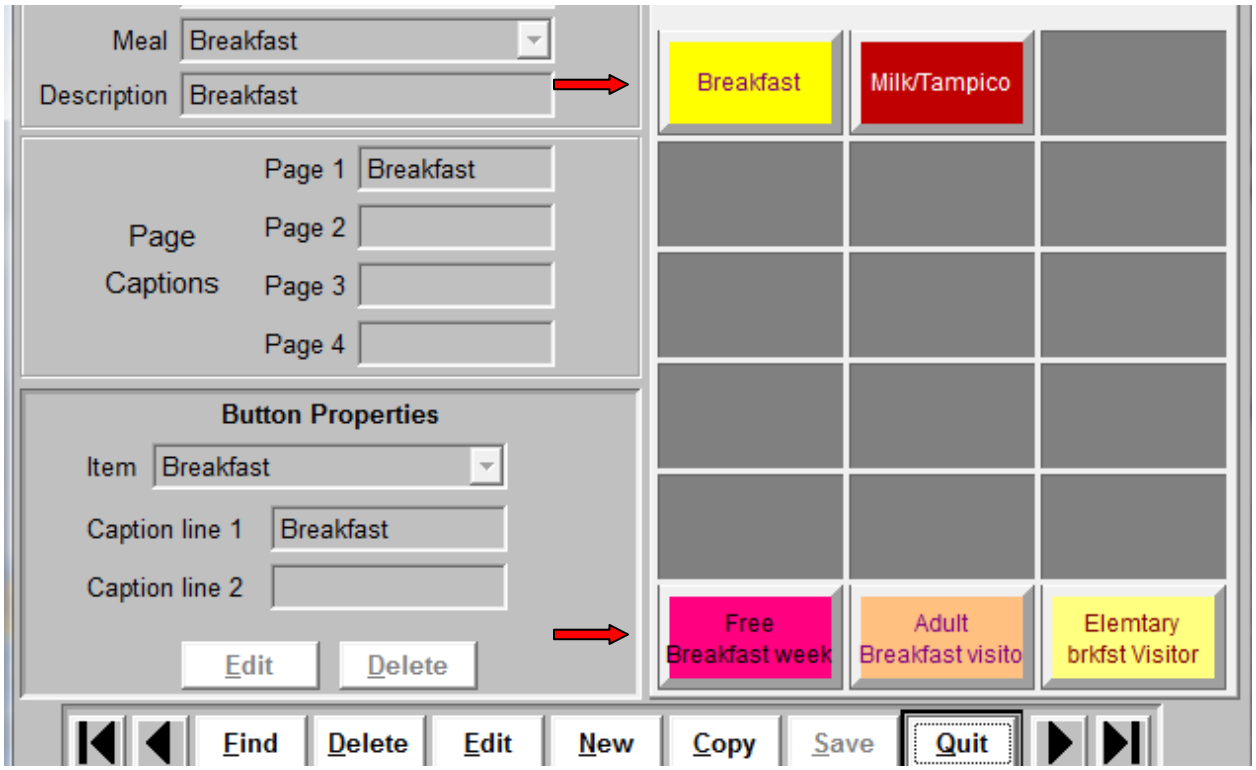
Select - **Save**

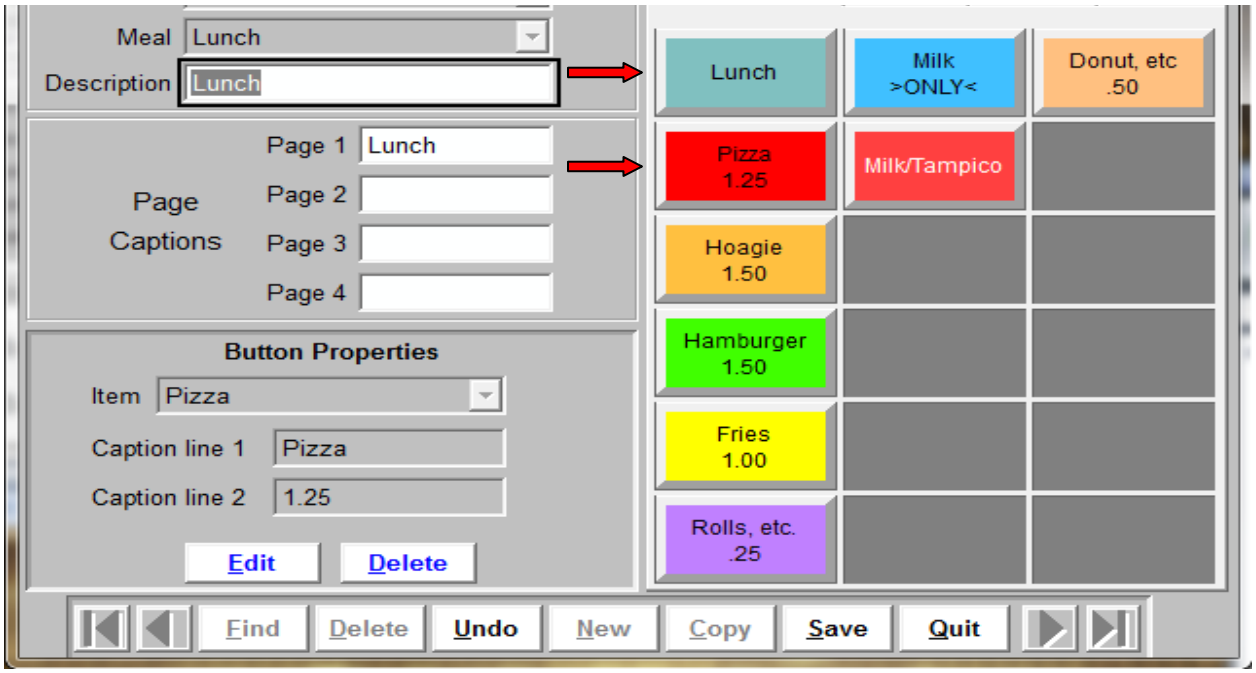




You can customize your **POS Designer** to fit your LEA: The following are some examples:







Customize your food service **POS Designer** as simple as you can. You will have fewer problems.

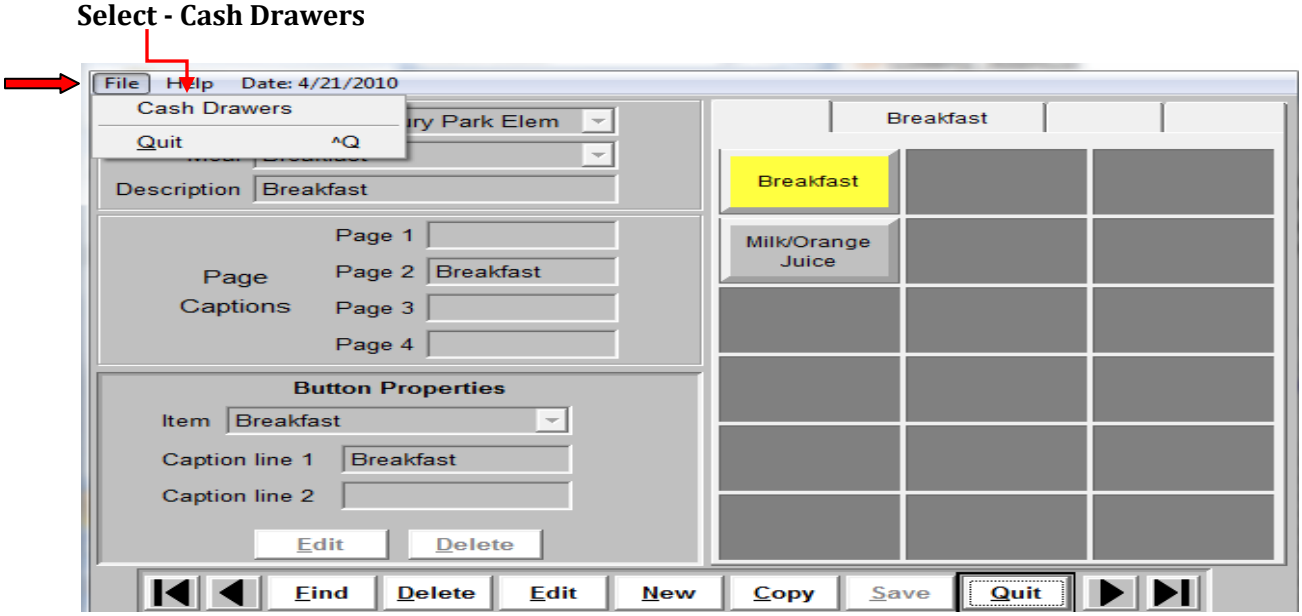
Cash Drawers

Taking **Payments** for **students, patrons**, and **faculty** members:

POS Designer Module

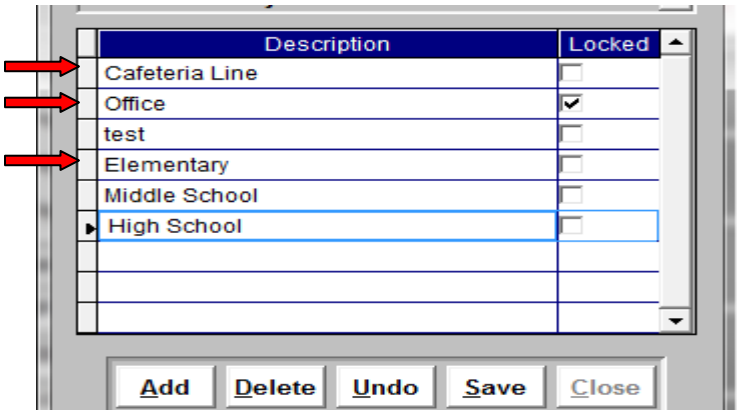
Select - File

Select - Cash Drawers

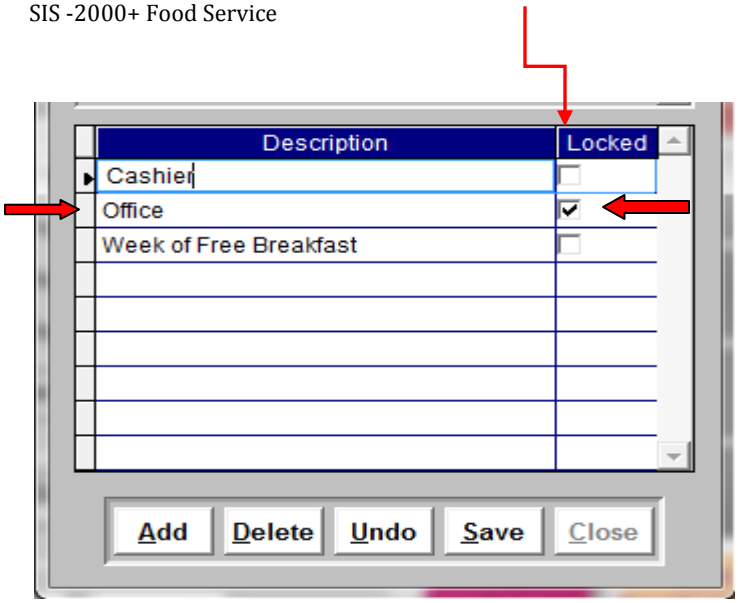


Select **Edit**
Select **Add**

Name the **Cash Drawers**



When naming the **Cash Drawers**, name them in a way that makes sense to your LEA.



You will notice the **Office Cash drawer** is locked (above)- Only Lock Cash drawers when you no longer use them.

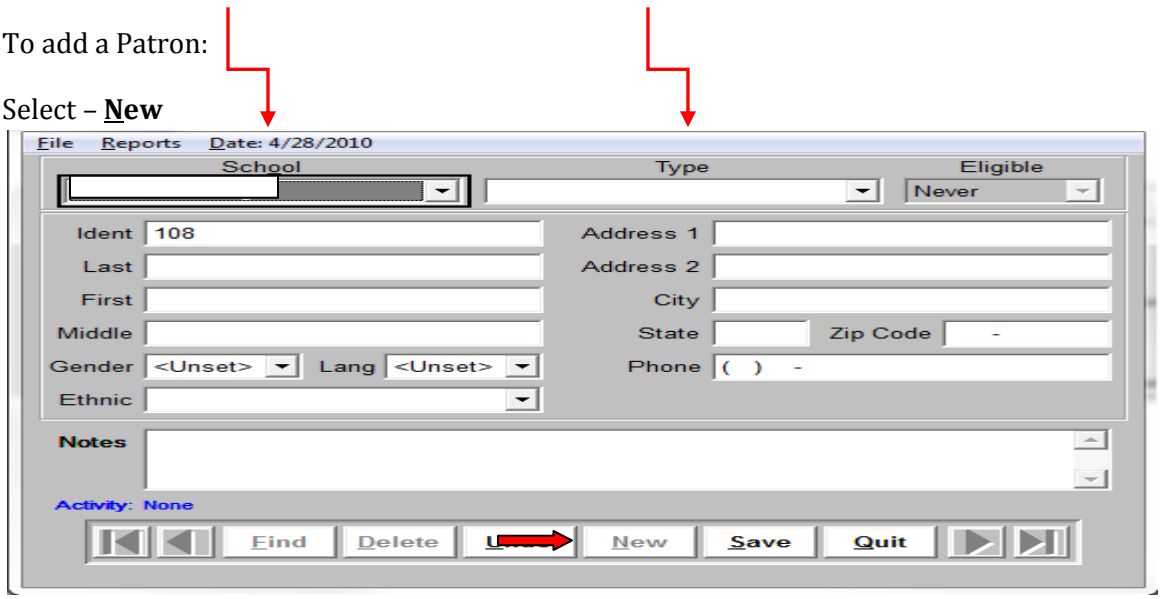
Patrons Module

Patrons are non-student accounts **(optional). Patrons are not eligible** for reimbursable meals.

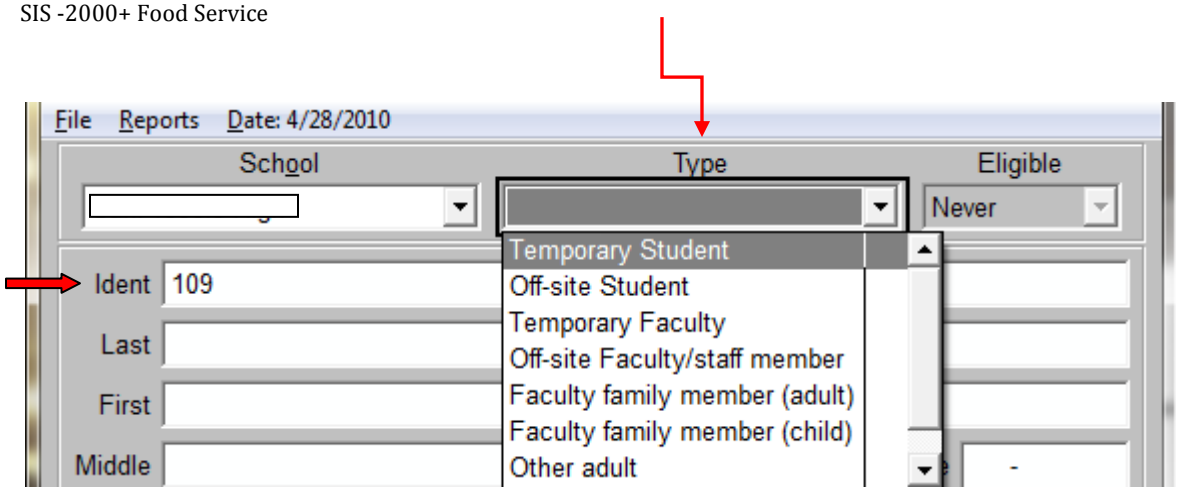
You do not have to add **Patrons**.

To add a Patron:

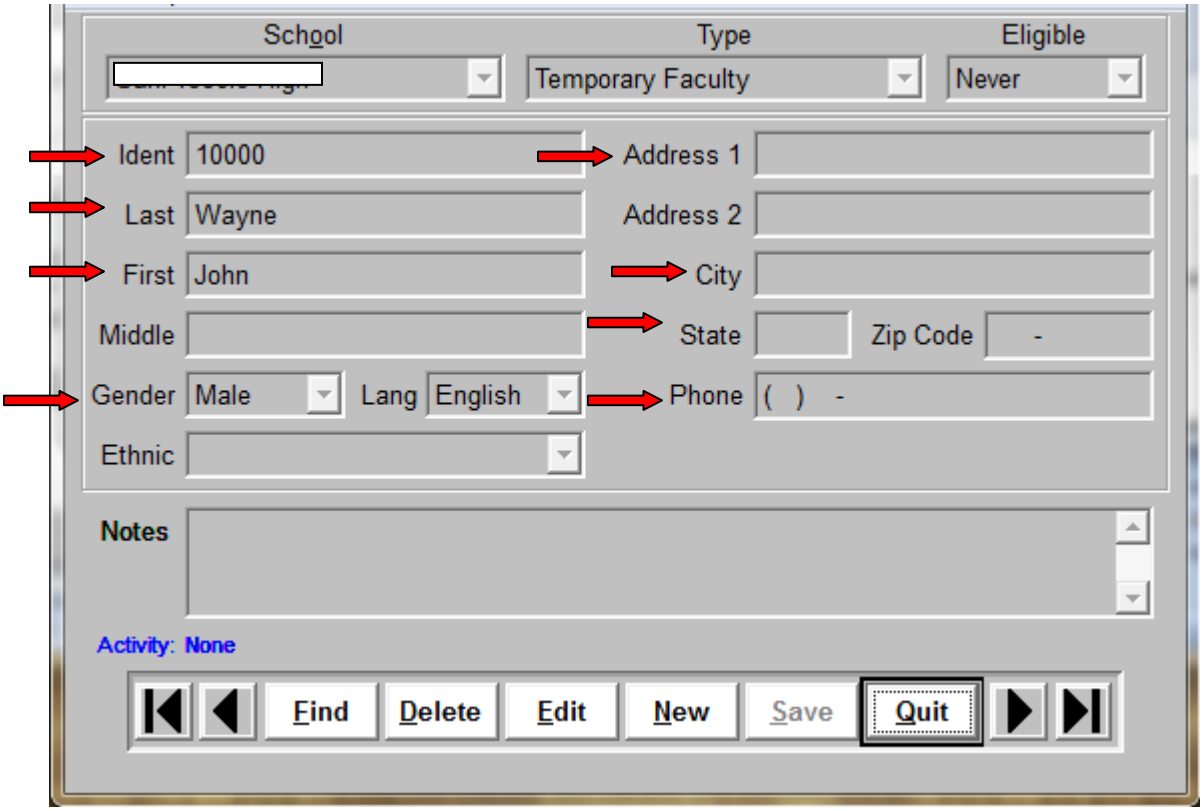
Select – **New**



Select - **School**
Select - **Type**



Ident – Start with a number and just keep adding to it – 10000, 10001, etc. for new Patrons



Enter **Last** Name

Enter **First** Name

Enter **Gender**

Enter **Lang** (Optional)

Enter **Address 1**

Enter **City**

Enter **State** Enter **Zip Code**

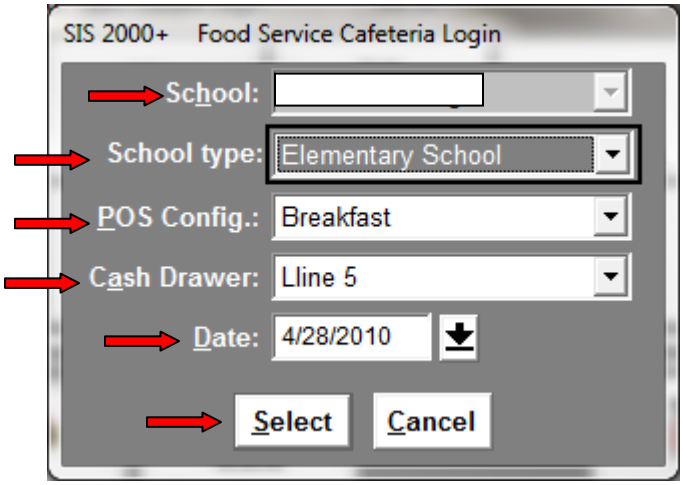
Enter **Phone** Number

Cafeteria Module

Serving Students, Patrons, Faculty through the **Cafeteria Module:**

Select **Cafeteria** Module

When first logging into the **Cafeteria** Module, it is **critical** to make the correct selections.



School: School Name

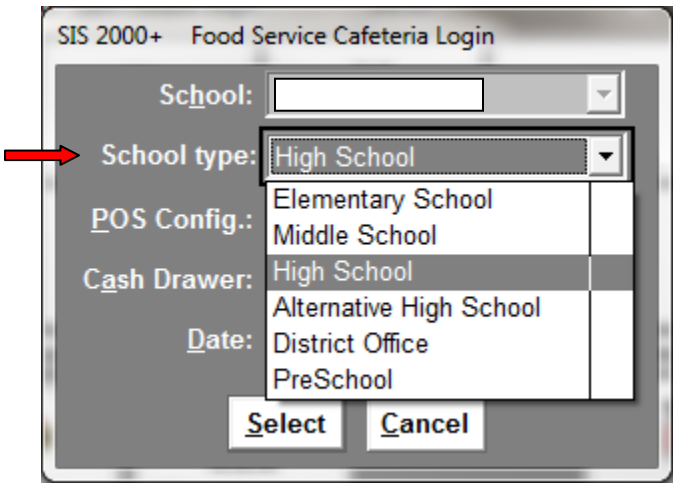
School Type: Select the **School Type** (**Meal Rate**) you want charged to students.

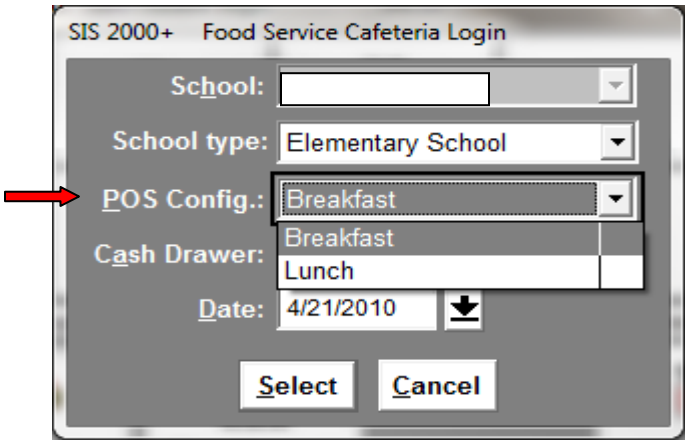
School Type reflects the **Rates** charged. (Elementary Student Rates, Middle School Student Rates, High School Student Rates, etc.)

If you are an **Elementary**, or want to charge **Elementary Rates** you will select **Elementary School** Type

If you are a **Middle School** or want to charge **Middle School Rates**, select **Middle School** Type.

If you are a **High School** or want to charge **High School Rates**, select **High School** Type.

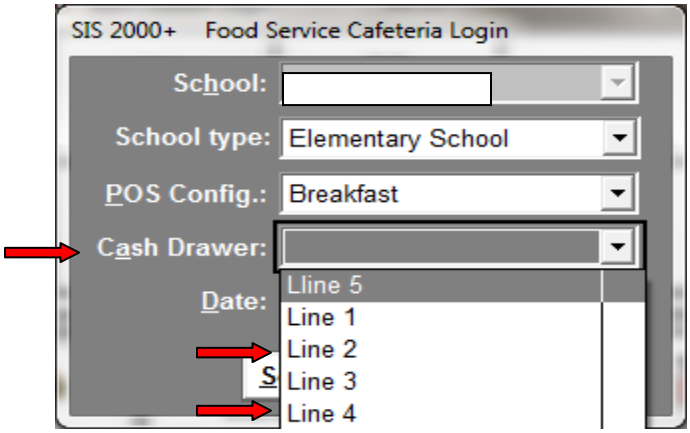




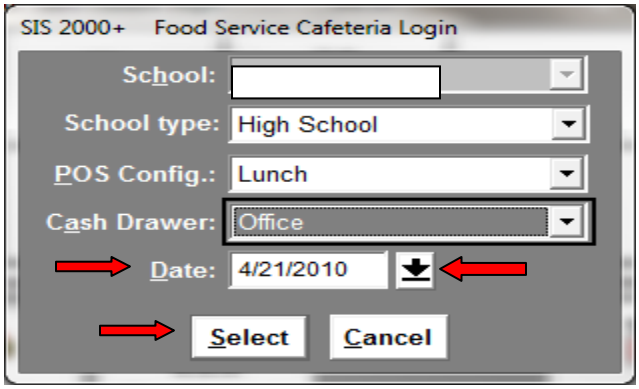
POS Config:

Select what you are serving **Breakfas**t or **Lunch**

Select **Cash Drawer** you want the meals to be processed through:



Select **Date:** The date you want the Rates charged to Students, Faculty, Patrons, etc.

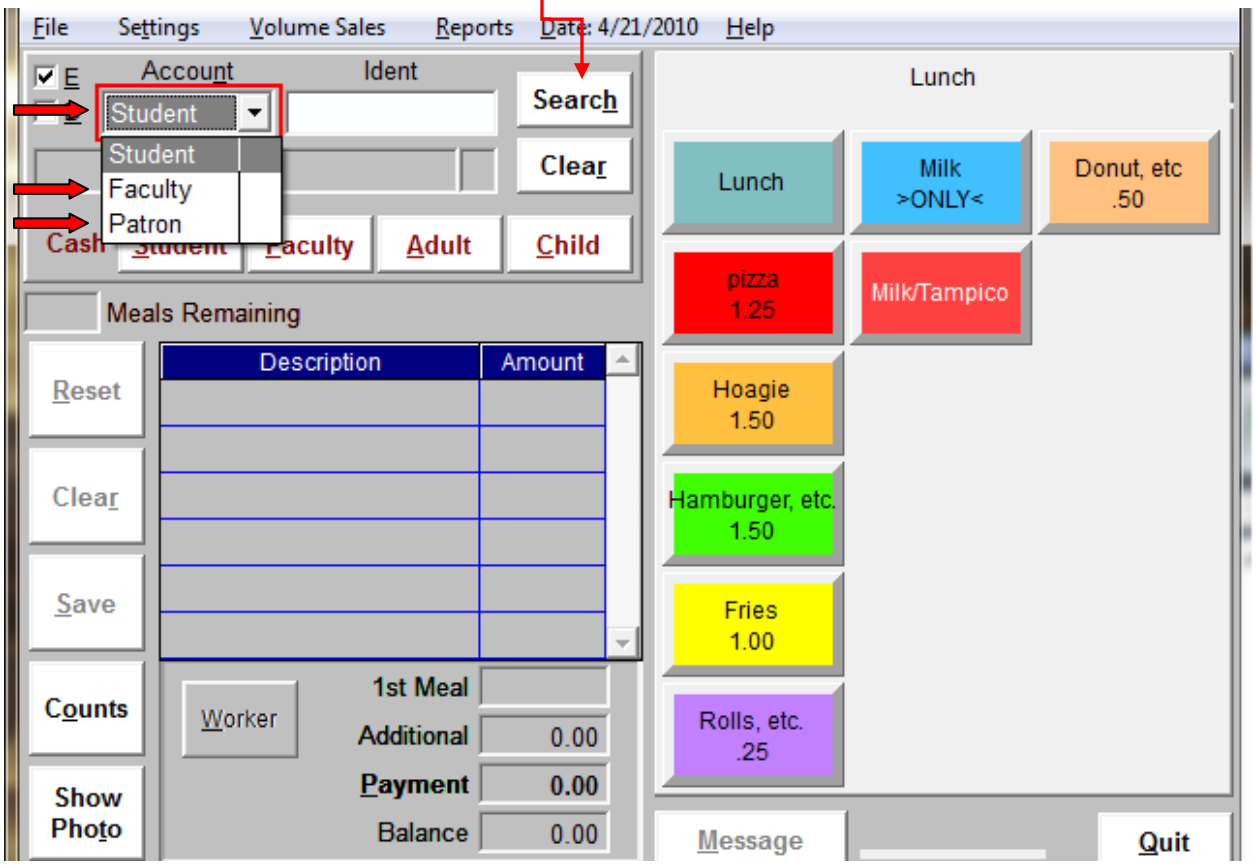


Date: Defaults to today's date – Typically, you will select today's date. If you want to select a different date – select the drop-down arrow and select the date.

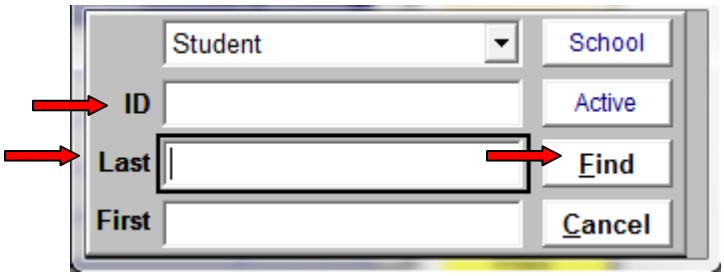
Select - **Select**

Account Defaults to **Student**

You can also select **Faculty** or **Patron**

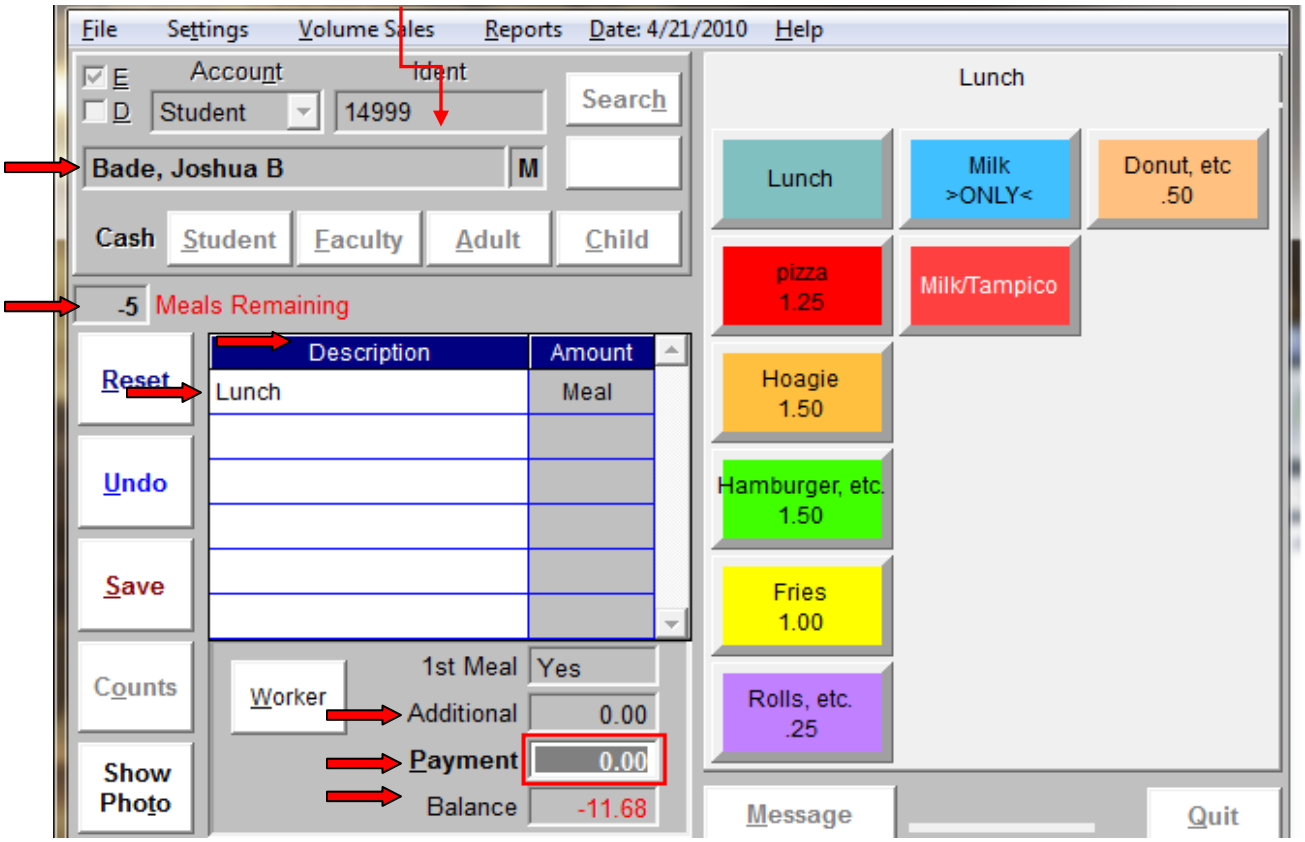


To select a **Student**: Select **Search**:



You can type in **Last** name or student **ID** - Select **Find**

After selecting a **Student** (**Joshua B Bade**) – is displayed



It automatically fills in what **Meal Type** you selected when first logging into the **Cafeteria Module**.

It shows **Meals Remaining** is **-5 (-Minus 5)**

Meal **Description – Lunch**

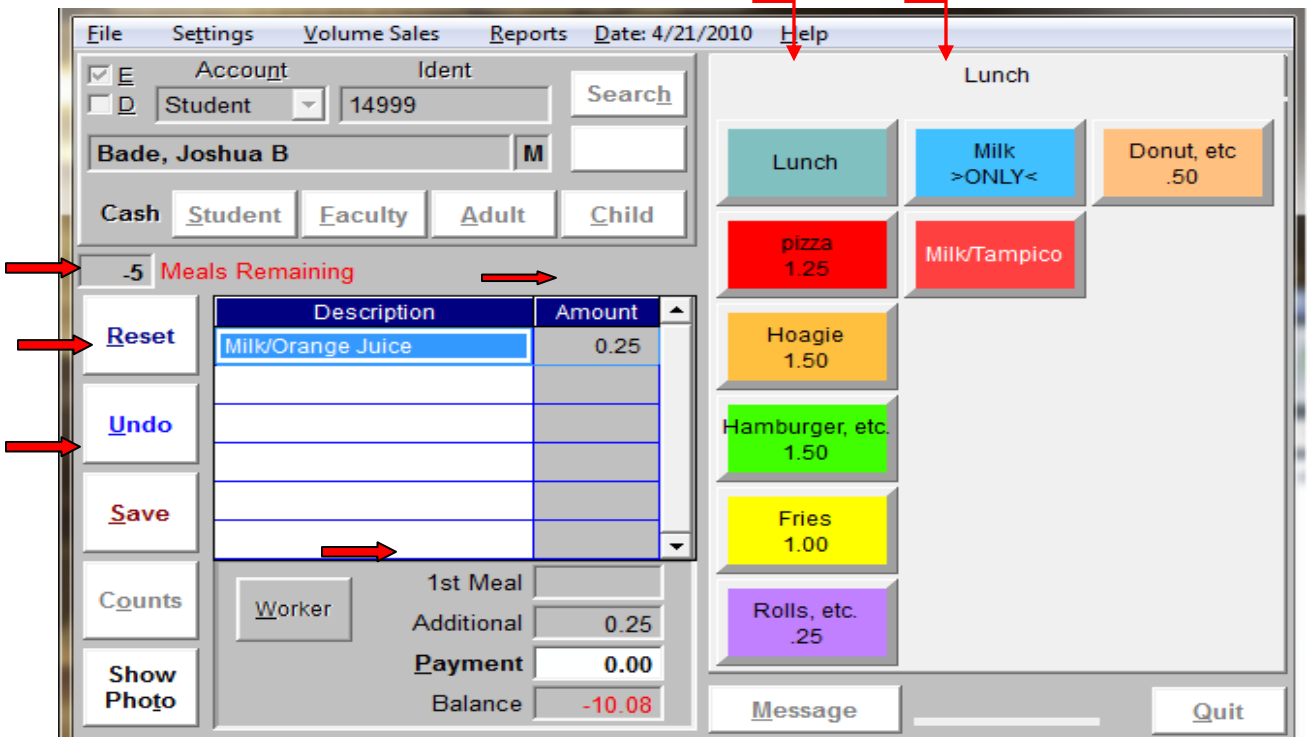
1st Meal - Yes– This is his 1st Meal today

Additional – 0.00 – This is if the student is having a second meal or ala Carte Item

Payment – 0.00

Balance - $-11.68

You can either **Save** this transaction which will follow through with the meal purchase and charge the student **or**



Reset – Will remove the student from the student selection and return the screen back to blank without charging the student **or**

Undo –will remove the meal that is listed in the **Description** and leave the student selected

ala Carte Item - If you want to charge the student for an ala Carte Item, click on the **ala Carte** button created in the POS Designer

ala Carte Items - Milk >ONLY< - Clicking on the **ala Carte** button will add the ala Carte Item in the **Description** and Show the **Amount (.25)** charged

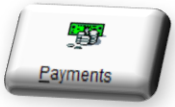
Additional – 0. 25

If you **select** and **high-light** the **Description – Lunch** – it will also remove it

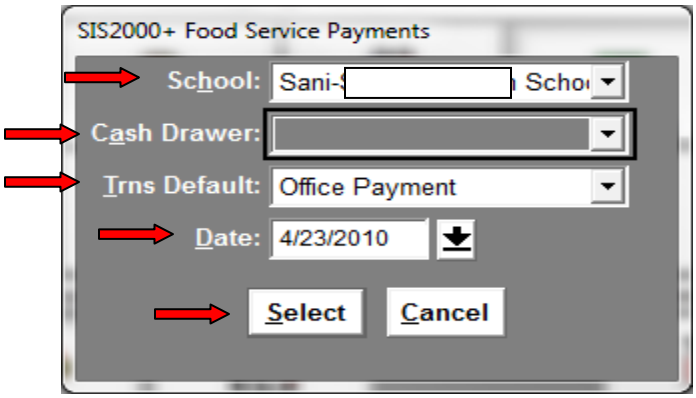
If you select the button Milk >ONLY< - it will charge him for 1 Milk – ala Carte

It will do the same if you click on the other ala Carte Buttons.
If you select **Lunch** Button when Lunch is already listed in the **Description**, it will charge him for two lunches.
Save - to save transaction

Repeat the steps to continue with the next student.



Payments Module



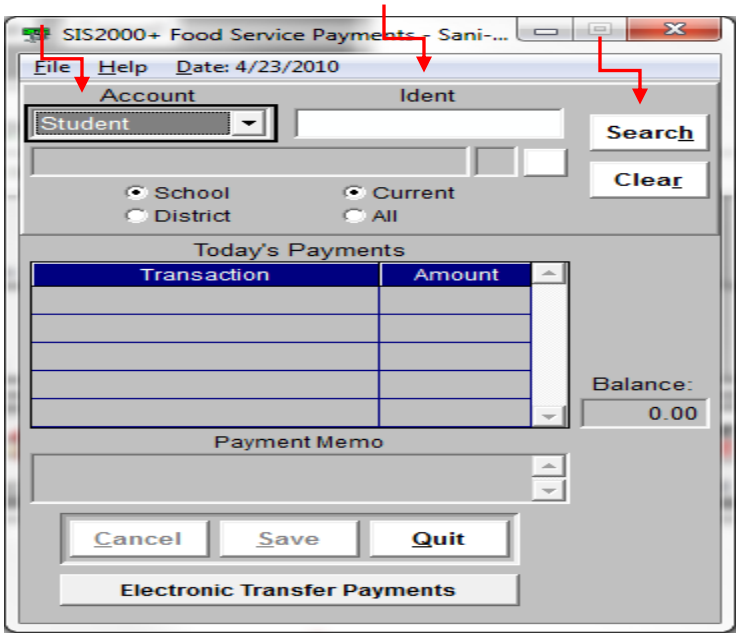
Select **School** :

Select the **Cash Drawer** you want to have the **Payments** processed through.

Select the **Trns Default** – (Transaction Default) to have the **Payments** processed through

Select the **Date –** you want to show the date **Payments** are made

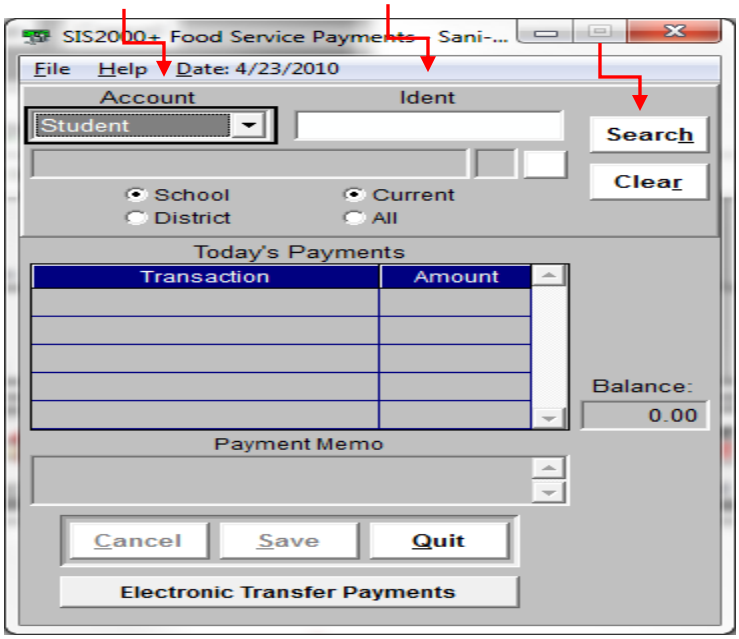
Select **- Select**



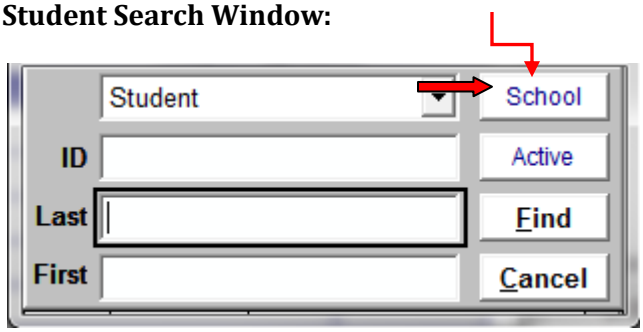
Select **Account** Type – Account defaults to **Student**

Type in **Student Ident** – Select **Search**

If you don't know the Student **Ident**, select **Search**, it will bring up a Student Search Window.



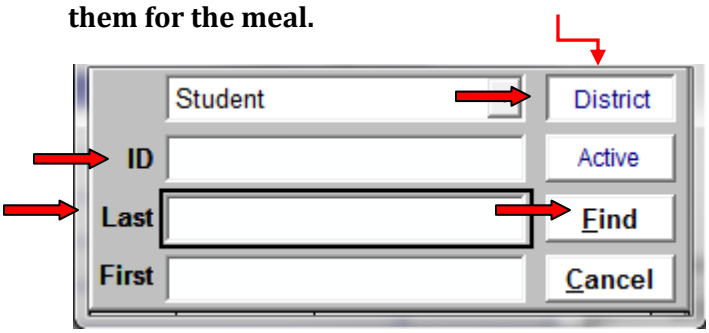
Student Search Window:



To search By Selecting School, it will change the School Type

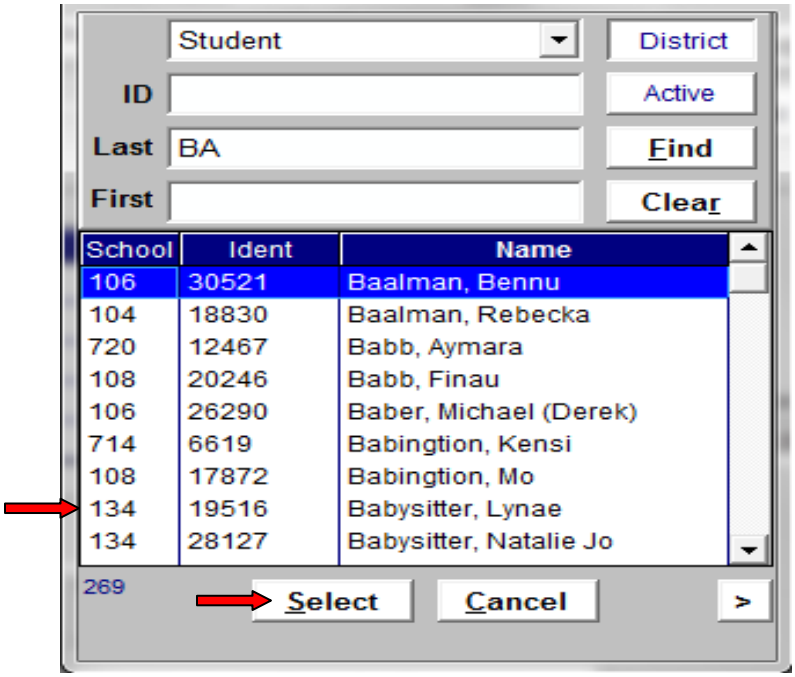
It will change from School Type to District Type

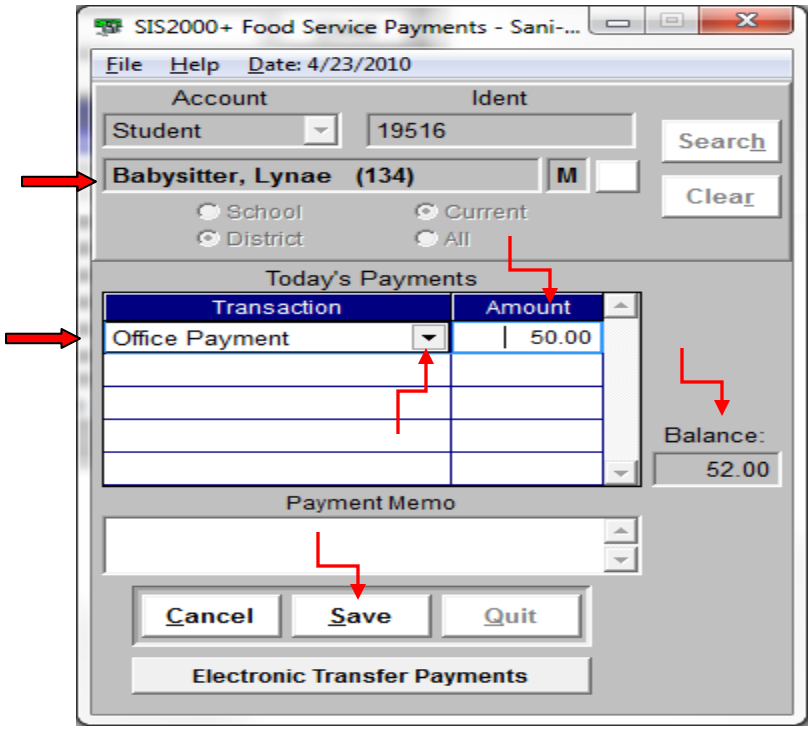
This is used if you have a student who is not enrolled in your school but, is enrolled within the District and you are serving them a meal. You will be able to find their name and charge them for the meal.



Type in Student ID or Student Last Name and select Find

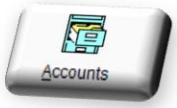
Select the student you need to enter a **Payment** for.





Select the Type of **Transaction** in the drop-down menu below **Today's Payments**. (Office Payment)
Type in the **Amount** of the Transaction (50.00) and **Save**.

Balance: of the **Student** Account will show.



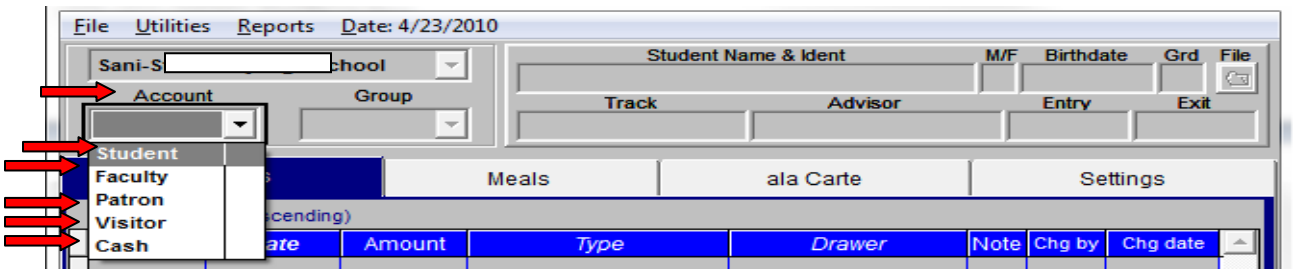
Accounts Module

Another place to put in **Payments** is in the **Accounts** Module.

You can do multiple types of transactions in the **Accounts Module**:

Enter **Status** - Free, Reduced, and Full Pay **Account Types**, Enter **Payments**, Enter **Meal**, **ala Carte** Transactions, and Student **Settings**

From the **Account** Menu – Select: **Student**, **Faculty**, **Patron**, **Visitor**, or **Cash**



Student – Accounts – Students enrolled in your LEA

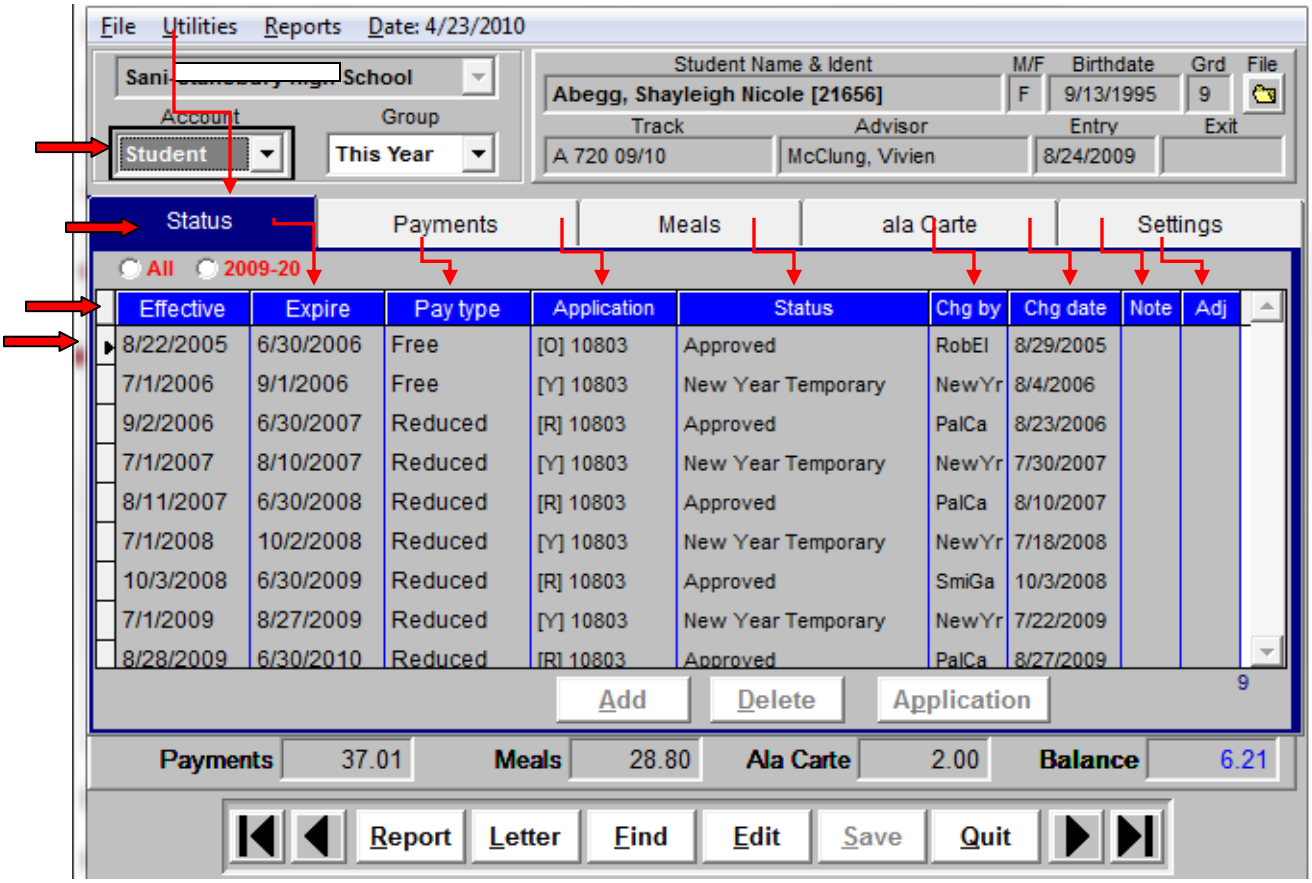
Faculty - Accounts – Faculty Members of your LEA (Employed by your LEA).
Faculty Accounts – are **non-reimbursable meals**.

Patron - Accounts – Volunteers, Parents, etc. who are not employed by your LEA.
Patrons Accounts – are **non-reimbursable meals**.

Visitor - Accounts – Volunteers, Parents, Adult, Child, etc.; who are not employed by your LEA.
Visitor Accounts – are **non-reimbursable meals**.

Cash - Accounts – Can be a Faculty Member, Student, Volunteers, Parents, etc.
Cash - Accounts are **non-reimbursable meals**.

Account – Student - Status Tab



Shows:

Effective Date for **Pay Type– 8/22/2005** (Pay Type: Free, Reduced, Full-pay - effective)

Expire Date for **Pay Type - 6/30/2006** (Pay Type: Free, Reduced, Full-pay expired or changed)

Pay Type – Free (Reduced, Full-pay)

Application – Approved ID Number - system assigned

Status – Approved (New Year Temporary, Denied) Eligibility Application

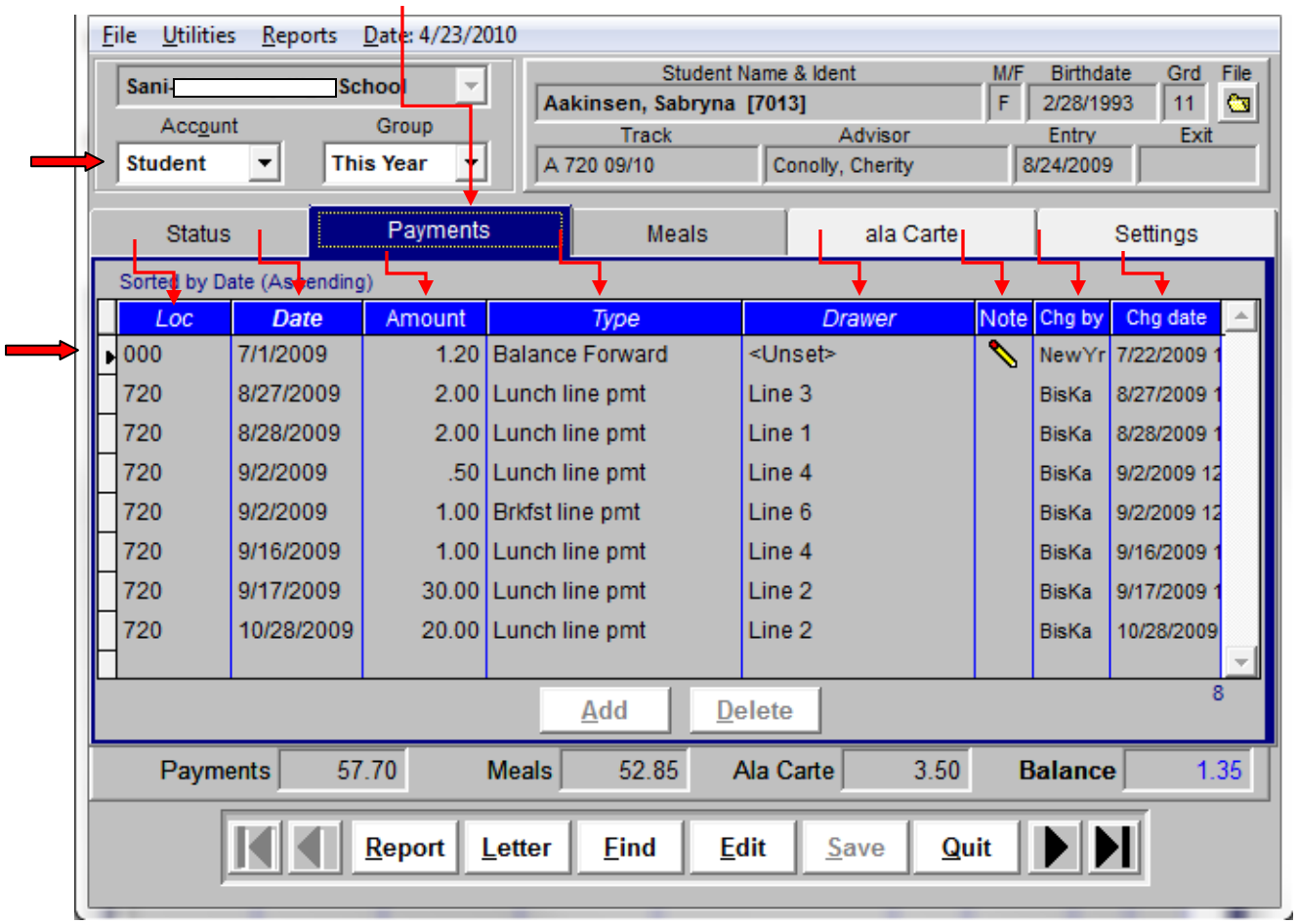
Chg By ((Data Changed By) – RobEl

Chg Date – 7/22/2009 (Data Changed)

Note – If there is information about the transaction

Adj – Adjustments, if there were any made

Account – Student - Payments Tab



Shows:

Loc (Location – School ID Number) - **000**

Date - 7/01/2009 (Date Payment was added to the student account)

Amount – 1.20 (Payment amount added to the student account)

Type – Balance Forward (from previous school year, Payment added in lunch line, breakfast line, etc.)

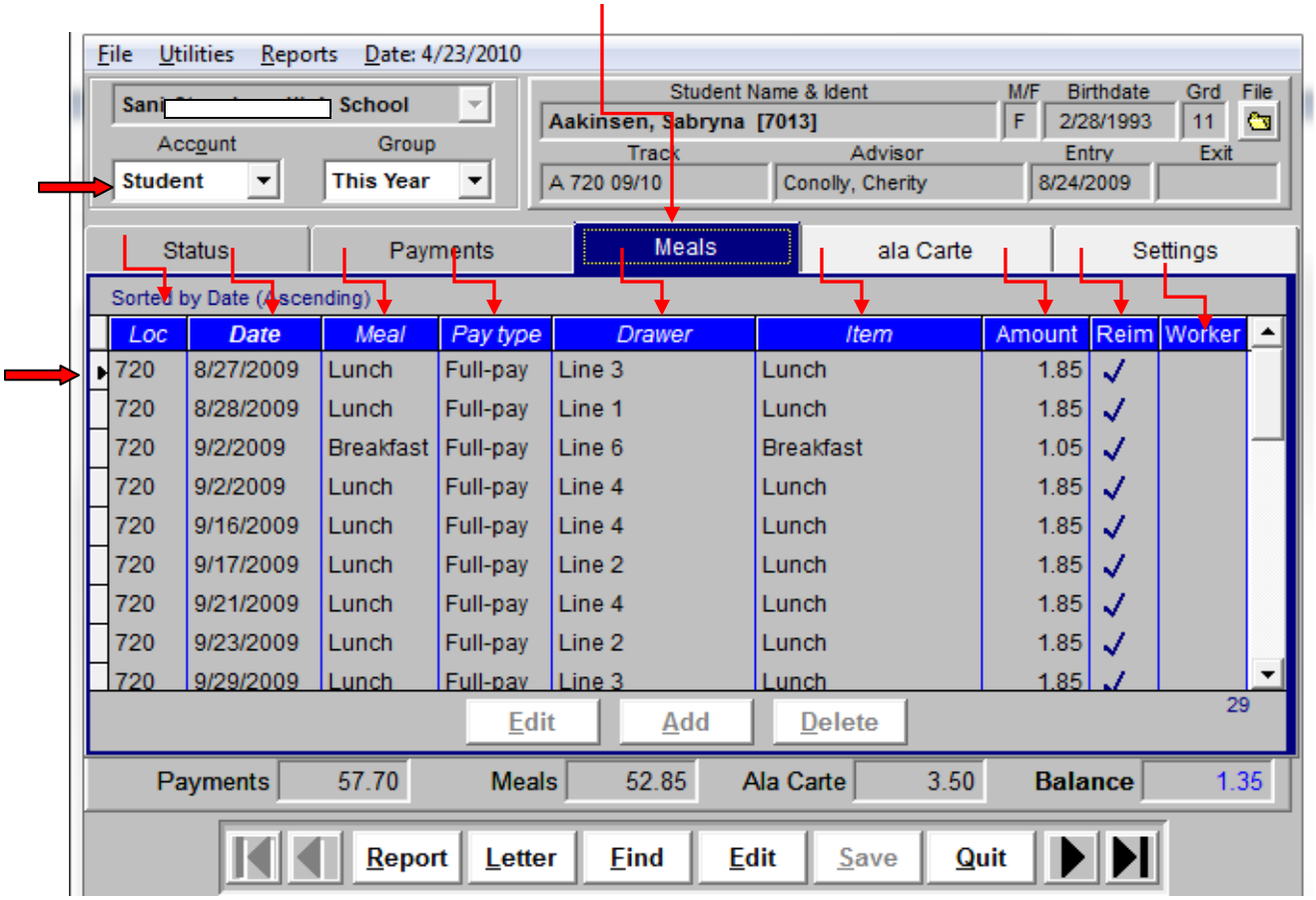
Drawer - <Unset> (If it is a balance forward from previous year, otherwise it will show the Cash Drawer the Payment was added through)

Note – If there is information about the Payment transaction

Chg by – New Year (New Year Roll Over or who the cashier was taking the Payment)

Chg Date – 7/22/2009 -(Data Changed)

Account – Student - Meals Tab



Shows:

Loc (Location – School ID Number) - **720**

Date - 8/27/2009 (Date Meal was served)

Meal – Lunch (Breakfast) – Meal Type

Pay Type – Full-pay (Free, Reduced)

Drawer – Line 3 (Cash Drawer meal was processed through) - **Cash Drawer** processed through

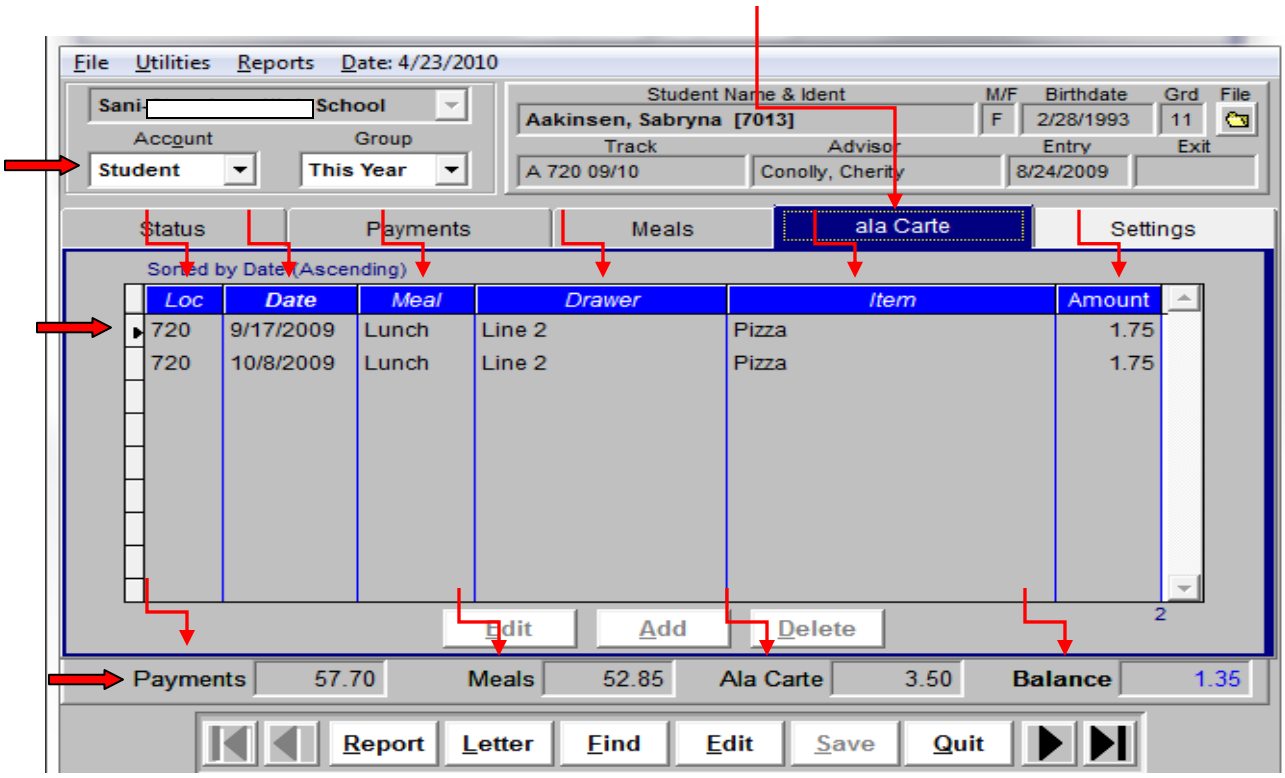
Item – Lunch (Breakfast, ala Carte Item)

Amount – 1.85

Reim (when checked ✓ - this meal is eligible as a **Reimbursable Meal**)

Worker - (Was a worker meal when checked ✓) Not a **Reimbursable Meal**

Account – Student - ala Carte Tab



Shows:

Loc (Location – School ID Number) - **720**

Date - 9/17/2009 (Date Meal was served)

Meal – Lunch (Breakfast)

Drawer – Line 2 (Cash Drawer meal was processed through)

Item - Pizza

Amount – 1.75

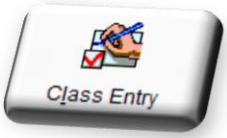
Displayed on ALL Account screens: Status, Payments, Meals, Settings

Payments – 57.70

Meals – (Total of all meals for the year) - 52.85

Ala Carte -(Total of all Ala Carte Items for the year) -3.50

Balance – 1.35



Class Entry Module

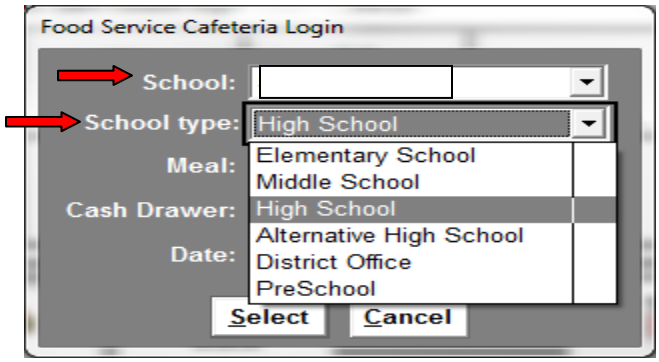
Class Entry is for entering student meal transactions by Class (teacher)

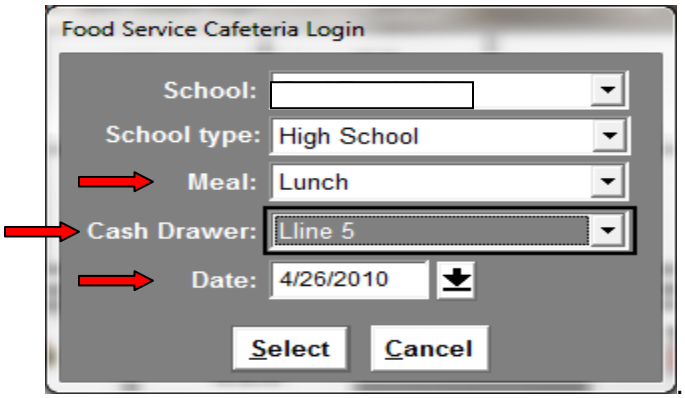
You enter the module the same way as you do the **Cafeteria Module**:

Select **School**

Select - **School Type** (Meal Rate) you want charged to students.

School Type reflects the **Rates** charged. (Elementary Student Rates, Middle School Student Rates, High School Student Rates, etc.)





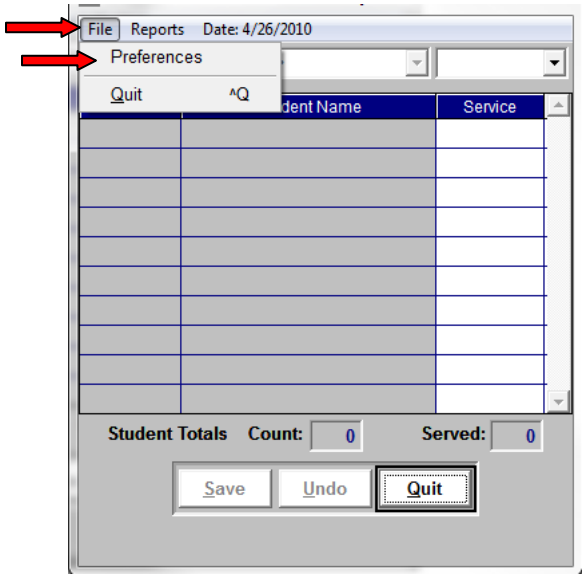
Select - **Meal** Type – **Lunch (Breakfast)**

Select - **Cash Drawer** - (Cash Drawer meal is processed through)

Select – **Date –** Meal transactions will be processed

First time going into **Class Entry**, setup the **Preferences**:

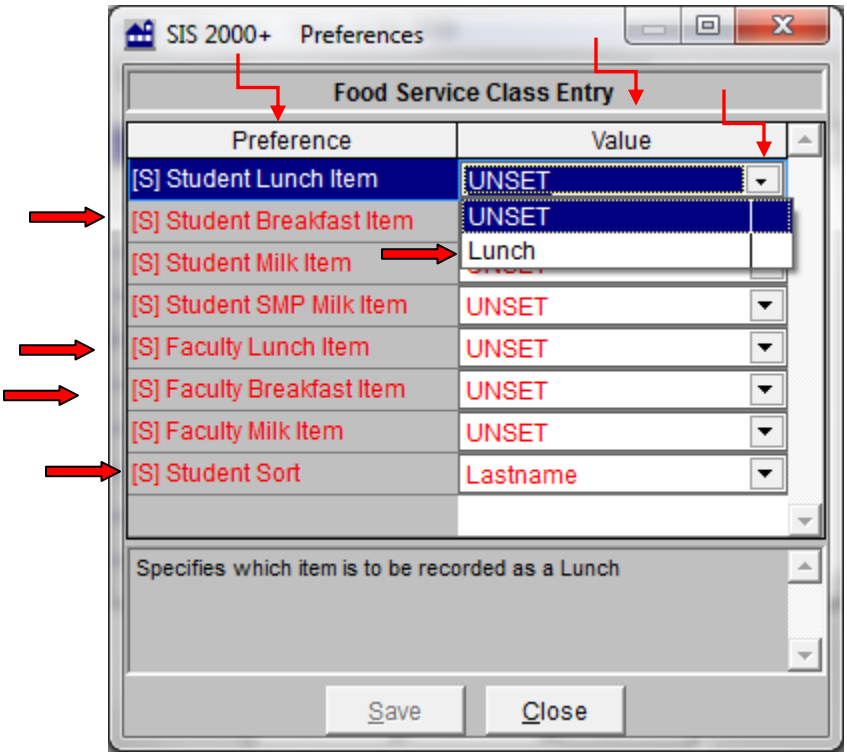
Select - **File - Preferences**



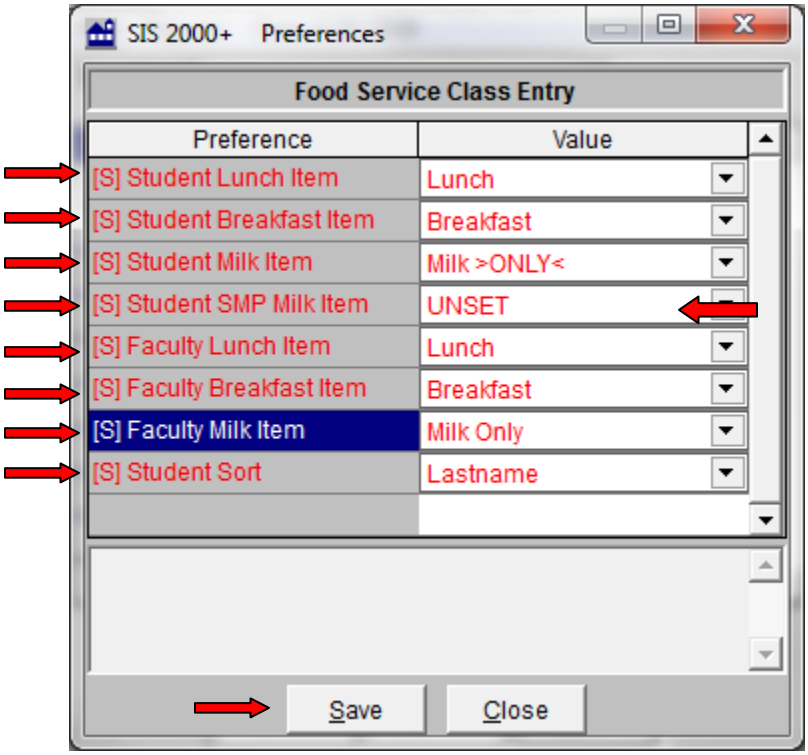
Go down through each listed Preference item and select the Value in the drop-down menu:

If you are not going to use some of the Preferences, you can leave them UNSET

Student Sort – Select - Lastname



This is how it should look if you use all Preference Items but the SMP Milk Item:



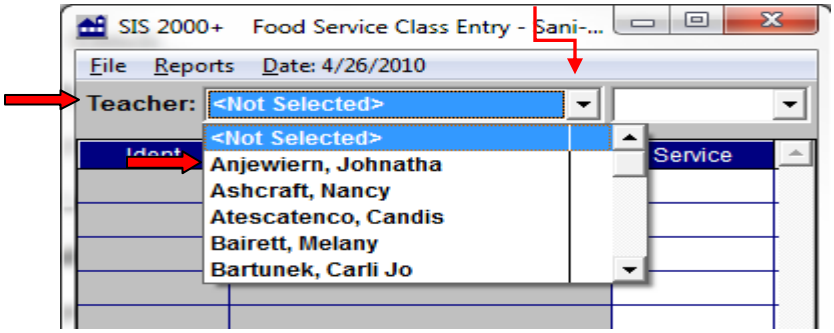
SMP Milk -

The (S) Student SMP Milk Item is UNSET.

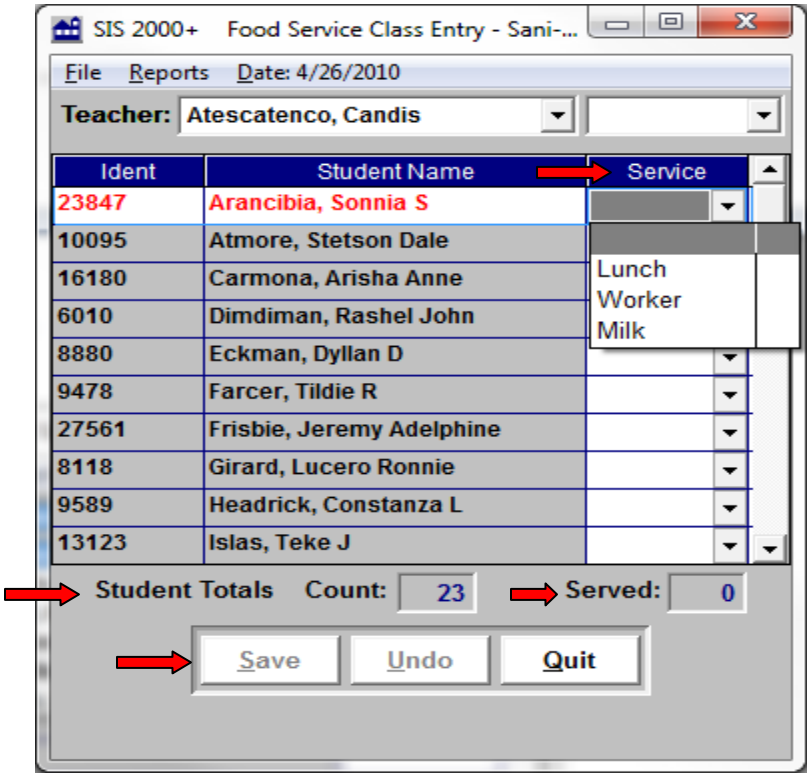
Leave this UNSET unless you use SMP Milk

SMP Milk is only used if you participate in the **Special Milk Program (SMP MILK). This is a reimbursable Milk Item.**
To use SMP Milk – contact **Child Nutrition Services** for more information at (801) 538-7680, otherwise do not select it and set it up.

After selecting the Values and saving the setup, you will be able to select the Teacher you want to enter meals for and the Students in the teacher's class will be listed.



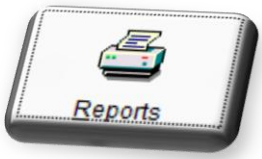
Select the Service – Lunch, Breakfast, Worker, Milk



Select the drop down for each student's meal type .
Add each student who is served and Save.

Student Totals : Count – 23 (Number of students enrolled in the Teacher's Class)

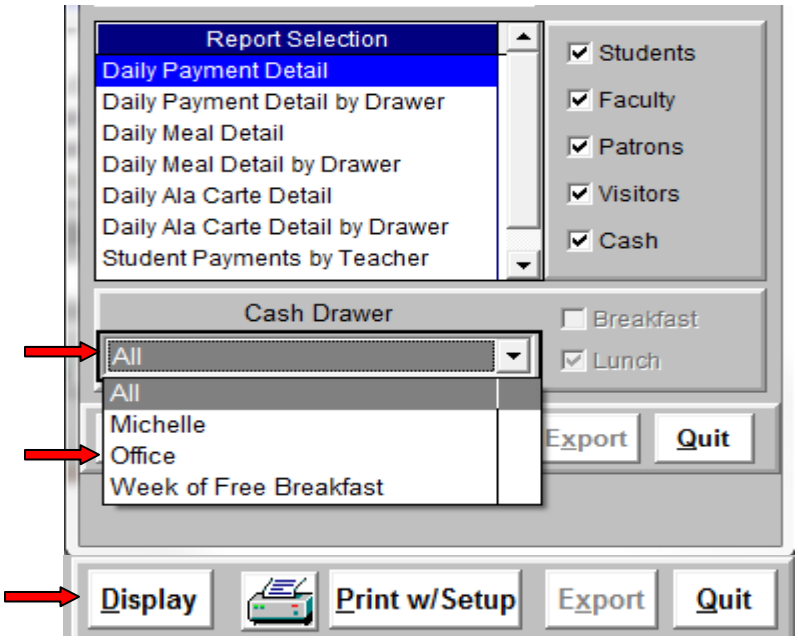
Served: (Number of students served the Meal Item)



Reports Module

Daily Detail Reports –

Report Selection

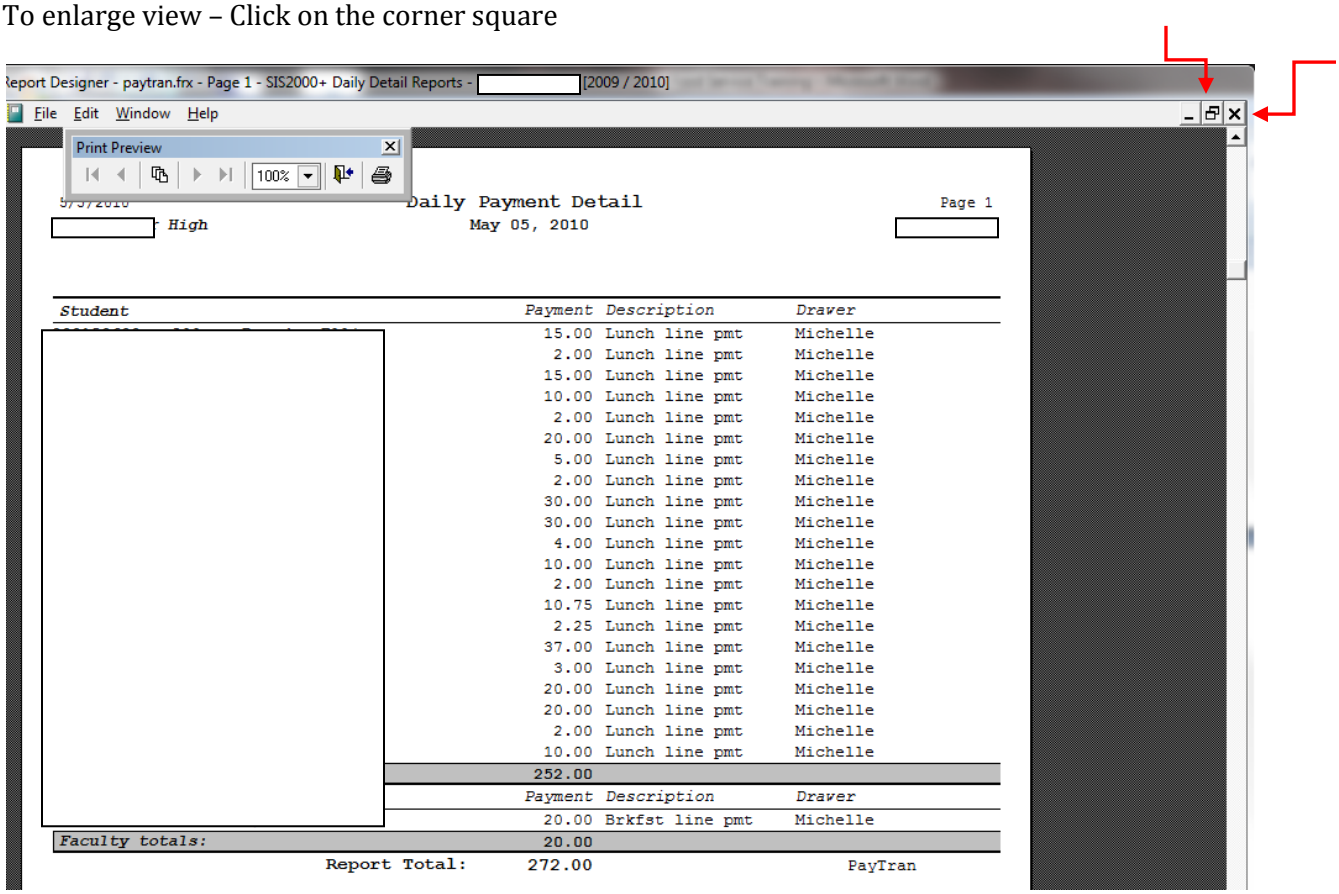


You can select All or each Cash Drawer for Reports

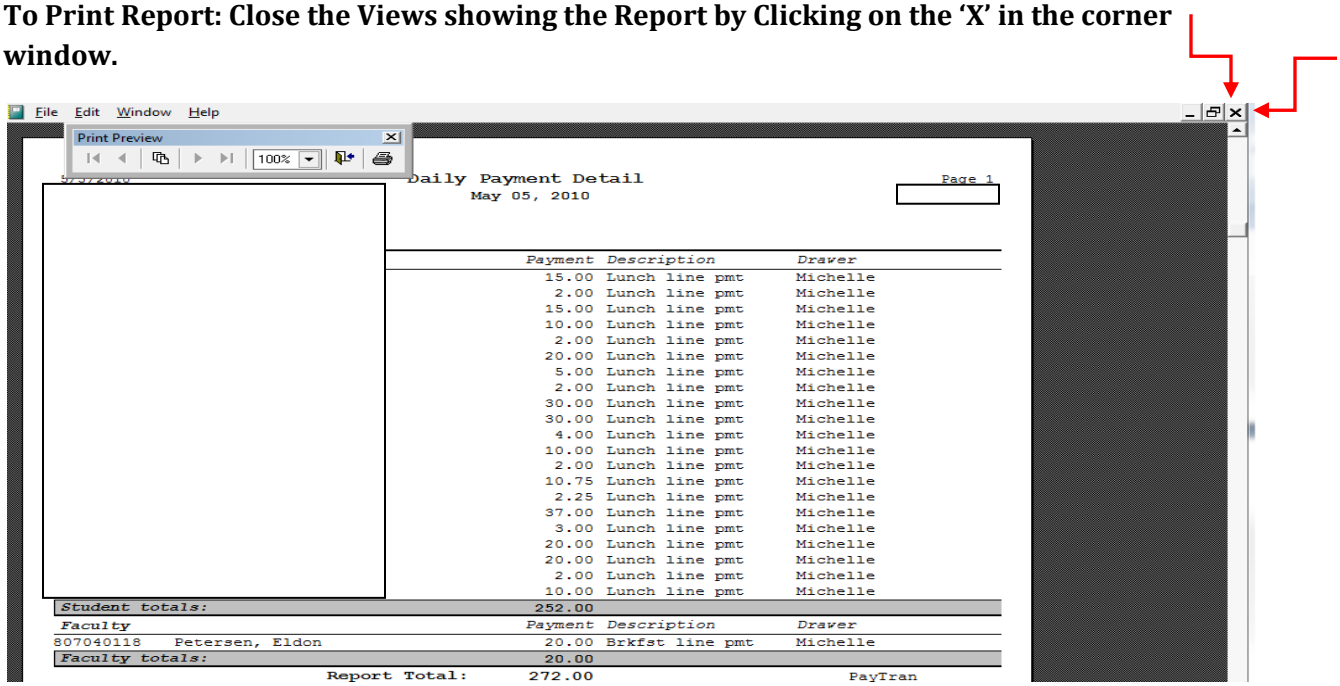
Select **Display**

The Report you high-lighted will open.

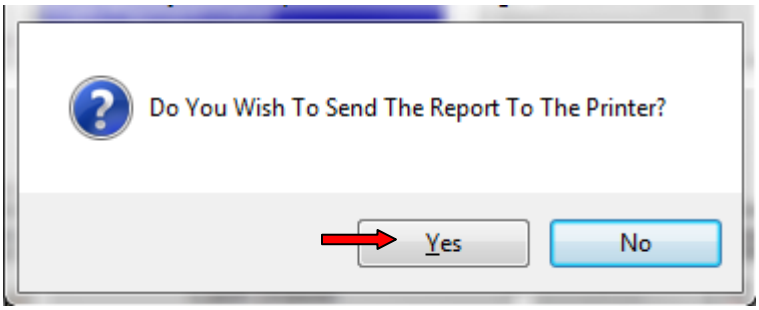
To enlarge view – Click on the corner square



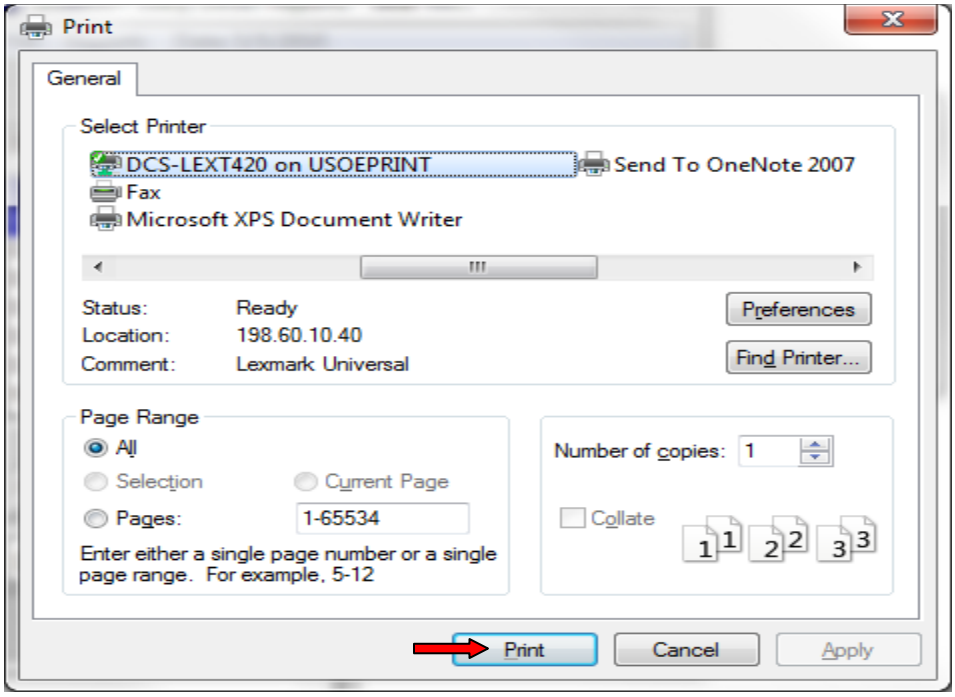
To Print Report: Close the Views showing the Report by Clicking on the 'X' in the corner window.



Continue Clicking on the 'X' in the corner window until all windows are closed and the Print Dialog Box comes up:



Select Yes



Select Print to send the Reports to the Printer.

Repeat this process for all Food Service Reports