

CENTER NAME: \_\_\_\_\_

Person(s) Trained: \_\_\_\_\_ Trainer: \_\_\_\_\_

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## 1. HOME PAGE

- A. INSTRUMENT PANEL: This week at a glance progress box shows you what you have completed in the meal service. The legend explains the color codes: Red- no meal or attendance scheduled. Yellow- meals scheduled and ready for attendance. Purple: Your food served was not enough for the numbers you marked in attendance. Dark Green: Your planned meal has been adjusted to the numbers in attendance.. Notice this progress box also notifies you whether you have a whole grain planned for the day. To see the entire month at a glance, click the calendar below the legend.
- B. ELIGIBILITY RATIO BAR: The Eligibility ratio meter lets you see at a glance what your Free/Reduced/Paid Ratio is at the moment. If you are a for-profit center, this is part of your eligibility criteria for participation (at least 25% of all enrolled must qualify at the free or reduced level).
- C. MILK RECEIPT SUMMARY: This helps you stay on track with your milk purchases! The planned milk for the month includes all milk, whole, skim, soy, etc. Grand total is on the top line. Grand total for Served milk is top right this is taken from your recorded attendance. Below, total is broken down for you in whole milk served (attendance counted) and whole milk purchased according to receipts. If you plan a whole month in advance, the planned and served will be very different until the end of the month. If you plan a week in advance, the numbers should be very close by weeks end. If you enter receipts for milk on a weekly basis, all three numbers Planned, Served and Purchased should match up on a weekly basis. Planned milk represents the amount poured and should always be accurate.
- D. POST MESSAGES. The message box is used to send and receive messages from your sponsor. After you read your messages, click Hide to remove them from your home page. To read your hidden messages, go to Facility/message history.
- E. STUDENTS WITH ISSUES: Students with missing or incomplete forms: This list is on your home page so that when you log in to Centerpilot, you know immediately if you have paperwork that you still need to collect from parents. New Students Appear here as well as Expiring Students.

## 2. FACILITY PAGE:

- A. FACILITY/FACILITY INFO: This page contains general information about your center. You can save your Meal attendance sort (usually by classroom) and you can add staffers to your list on the left. All other fields must be changed by your sponsor.  
**TABS: #Attending Meals tab:** Enter your estimated numbers for each meal. Include infants if you are serving them. These numbers are what Centerpilot will use to calculate how much to open. You may need to modify these numbers weekly or monthly if you experience a fluctuation of more than 1 or 2 students. This is your planned total, not your exact attendance.

**TABS: MEALS SERVED TAB:** Your sponsor approves your meal service schedule; If you need a change to the schedule, contact your sponsor.

**TABS: OPERATING SCHEDULE:** This is your approved hours of operation. If you need a change, contract your sponsor.

- B. **FACILITY/MANAGE CLASSROOMS:** Set up your classrooms by first adding the name of a class and saving it. Once you have your classrooms named, select the “display all participants” button. Next to each participant’s name, you can select their classroom. If you leave anyone unassigned, his or her name will not appear in the attendance page to be marked present.
- C. **FACILITY/MESSAGE HISTORY:** Here you can read all the messages sent to you and sent by you.

### 3. PARTICIPANTS/INFORMATION:

- A. **ENROLL** a new participant, go to the Participant Information tab. Complete all the fields in yellow to populate the required forms. If your sponsor requires only the top 6 fields to populate, be sure to also designate the classroom here. Most sponsors require race and ethnicity. Set Participants times for all week by clicking the red M-F box. Once you finish and save a participant, only your sponsor can change certain fields.  
Special MILK : If you mark this participant has receiving special milk, the total milk served at attendance to this participant will calculate outside the cow’s milk totals.

**TABS: PARTICIPANT ELIGIBILITY:** This is sponsor use only.

**TABS: DAYS ATTENDING:** You can edit this field when schedules change.

**TABS: GUARDIAN INFO:** The address will populate from the enrolled participant address.

- B. To enroll a sibling without having to enter the same parent information, you can begin with the participant you want to copy from. Once you select the name, the copy button will be available. Use the sibling name in the drop down that you have already created to copy. Be sure to complete the Date of Birth field and the First and Last Name field. You can select the classroom now or later.
- C. Click save and you can print an enrollment form and a Meal Benefits Form.
- D. You can click either the enrollment form or the meal benefits form for printing. The forms will populate with the information you have entered. The parent can then look over the form for accuracy and sign and date.
- E. When a participant is no longer enrolled on your program, you can select the Drop Participant button. This action will remove the participant from your lists, so you want to be sure you have recorded your attendance up to this date in Centerpilot. If you remove the participant from your enrollment, his name will be immediately removed from your meal attendance page.
- F. You are unable to record an earlier date than the current date for dropping a participant. If the current month is January, the participant’s enrollment will count all month long in the free/ reduced/ paid ratio for January, no matter what date you record the drop. The enrollment will not count in the February ratio if you drop him in January.

- G. To reactivate a student, change the list from active to list of dropped. . Select the participant and click reactivate.
- H. Centerpilot will alert you with an error message if you try to enroll a participant that is already in the database.
- I. If you make a mistake when enrolling, don't start over with a corrected participant. That will create 2 free/reduced/paid statuses in your ratio. Just call your sponsor to correct the error on the original entry.

#### 4. ASSIGN A CLASSROOM

- A. FACILITY/Manage Classrooms
- B. Click Add Classroom and type the name of the classroom.
- C. Click Save Classroom Name. Repeat for each classroom.
- D. Once you have all your classroom names entered, choose one from the drop down box.
- E. Select the participant that you want to place in the selected classroom.
- F. THE UNASSIGNED classroom will not show up on your meal attendance page

#### 5. MEAL SERVICE: BE SURE YOU HAVE YOUR EXPECTED ATTENDANCE SET

There are 3 ways to schedule a meal. You can select the meal, the date and the individual food items to be served.(slowest way) You can pre-save your meals and select each meal on a daily basis, or you can save your meals, add them in a pre-saved week and schedule a week all at once.(fastest way) You must have a meal scheduled in order to mark attendance by child. The legend on your home page shows you what your meals gauge will look like after you accomplish each step.

Schedule an Individual Meal:

- A. MEALS/Create/Edit Participant Meals: Select the meal type you are scheduling. Select the food items you are serving from the drop down boxes for each component. Be sure to select the items by weight or package that match weight and package of the item you are serving. Each item will populate your cooking detail to instruct you on how much exactly is needed, and to round up to the nearest  $\frac{1}{2}$  . This amount is what your records will show as being served. When you click "save" this meal and corresponding quantities will be recorded.

TIP: The fastest way to schedule meals is to enter meals in the PRESAVED Meals page, so that when you are ready to schedule, you can simply select meals that you have already saved. (See page 4 for how to create pre-saved meals)

- B. If you look at MEAL Gauge on your main page at this moment, it would change the color from red to yellow. You are ready to record attendance for this meal.

TIP: If you have 3 or 4 children at a meal, it is better to choose milk by the cup, as opposed to milk by the gallon. If you choose a gallon, the smallest amount it will record is 8 cups or ½ gallon. This will overstate your actual consumption and will create a false meal production report.

## 6. Meal Service Step 2 ATTENDANCE

The system is designed for you to take attendance at the point of service using a tablet or hand held device. If you choose to mark attendance on paper and enter it in the system later, you need the Report under Reports/Meals/**Meal Counts by classroom** (or age group).

- A. You can set this sort to classroom or age group on your ADMINISTRATION/CENTER INFO page.
- B. Select Attendance/Take Meal attendance
- C. Choose the classroom/group from the drop down and mark attendance by clicking the attendance box by each participants name.
- D. You also have the option of clicking set all to attend and then unchecking the absent participants.
- E. Click Save this attendance and select the next classroom. Note your home page meal gauge will now show green to indicate all steps are complete.

Troubleshooter: If you can't get this report, you need to check facility page to see if you are on Classroom sort or Age Group Sort. – This determines which report will populate.

## 7. PRESAVED MEALS

- A. Select Create Pre-saved Meal: choose the meal and type (non infant) you would like to create.
- B. Select each component to build your meal.
- C. Name your meal; be sure to use detail to describe each component of the meal. If you have selected a whole grain for this meal service, be sure to include the letters WG in your meal name so when you are putting together a whole week you can see what meals meet the WG daily requirement.
- D. Choose Save button and you have stored your meal.
- E. To edit a meal, you can select the meal from the drop down box and change any of the components. (For example, you now use a 78 ounce can instead of a 28 ounce can) You simply replace the contents with the update and click save.

## 8. PRESAVED MEALS /CREATE A PRESAVED MEAL WEEK

- A. Select the type of meals you are building- children/adults or infants.

- B. Beginning on Monday, choose the meals for the day from the drop down items, i.e. breakfast, lunch and pm snack.
- C. When you are finished selecting Monday's meals, click the Tuesday tab and schedule meals for Tuesday.
- D. When you have completed the week, click inside the Name box and give this meal week a name; example: Week 1 Winter

9. **PRESAVED MEALS/ SCHEDULE A PRESAVED WEEK:** Now that you have some saved weeks to choose from, you can schedule a week at a time.

- A. Go to PRESAVED MEALS/SCHEDULE A PRESAVED WEEK
- B. Select the week you want to schedule and assign that week to a Monday on the calendar. NOTE: The amount of food you are planning is based on your default attendance numbers.
- C. Note that you cannot schedule meals for the whole week into a week that already has meals saved in it. (UNLESS you delete the existing meals and any attendance-use only when you need to rewrite the whole week)
- D. Choose the name of the week to be scheduled from the drop down
- E. Click Save this Week Schedule and the meals are saved to the week you selected.
- F. Your grocery list will download in excel.
- G. This week is ready for attendance

#### 10. MANDATORY REPORTS:

##### MEAL REPORTS/MEAL PRODUCTION REPORT:

- A. This report should be printed after you SCHEDULE your week and should be posted in the Kitchen. Go to Meal Reports/Meal Production Reports and print one for infants if applicable and one for non infants.
- B. The cook must note changes or additions manually on this record if they are not saved online.
- C. These changes can be entered after attendance if necessary.
- D. Note: Centers are required to record how much they open (quantities) and serve to children. If you don't have this information written on this record, when the Monitor comes to review you, they will consider your records incomplete.

#### 11. ATTENDANCE/MEAL ATTENDANCE TEMPLATES BY NAME, AGE OR CLASSROOM

This report is used at the meal service to mark attendance by name at the point of service. Note: This can also be completed using a hand held device like a smart phone or a tablet. To print this report, select the GET REPORT button and select the download icon, or the print icon.

## 12. RECORDING EXPENSES:

- A. Go to Receipts/Receipt Entry
- B. Select the correct claim month from the drop down.
- C. Enter each receipt by date. Select the type of receipt and enter the appropriate name. After you have saved the receipt you can record milk. Select the edit pencil next to the correct receipt. Select the New Milk Entry on the left and add the purchased milk count. Enter the total gallons (or pints) purchased, not the \$ amounts. For grocery store items, separate the eligible expenses into the two categories: food and supplies (like paperplates). Only record the allowable expenses from your receipt. If you purchase other goods, like baby wipes, deduct that cost from the recorded amounts – it will default into the non-cacfp costs.
- D. Remember: Your reimbursement should not exceed your expenses. If you find that you are not spending all your CACFP income, you can begin claiming wages paid to cooks, teachers, directors for the time they

## 13. SUBMITTING THE CLAIM:

- A. Click on Meals/Meal Calendar. Check that all your meals and attendance have been entered in the system : You should have all green dates.
- B. You cannot submit a claim before the last day of the month—the claim button to select the month will appear once the month is complete. Select the month and click submit.
- C. The person who has been trained and designated as authorized to submit the claim will be in the drop down. If your name is not in the drop down list, you may need to be trained by your sponsor.

## 14. POINT OF SERVICE FAILURE

- A. CLICK ON Meals/Meal Calendar: If you see the color purple, this indicates a shortage in your meal service. If you have not planned enough food to serve all the children in attendance, the calendar date display is purple for that meal.
- B. If you recorded your additional food on your printed Meal Production Record, (meals must be recorded daily) you can go to Meals/Create or EDIT meal and change your planned participation to edit the record.
- C. If you did not serve enough food, make no change and the system will calculate the shortage and apply this in the claim. Be sure to update your planned participation going forward.

IMPORTANT: If you edit a meal after you have already taken attendance, you will need to go to attendance/take meal attendance and save one group again. This save action is what prompts Centerpilot to measure the food against the actual attendance to check it.

## 15. OTHER REPORTS

### MEALS/MEAL CALENDAR

#### CREATE PDF MENU:

NOTE: To use this feature, your meals must be pre-saved and scheduled using the weekly scheduler. Meals entered one food at a time will not have a "name" that the system can recognize.

- A. Select the weekday menu date from the calendar box (choose a Monday)
- B. Click Create Menu
- C. Click the Menu Icon that pops up.

### MEAL REPORTS/MONTHLY MILK REPORT

This page will help you check to be sure you are purchasing enough milk and planning correctly.