

## oklahoma KidKare

#### Multi-Site User Manual May 2025



Scan this code to access the Oklahoma Training Site for Sponsors and SFAs



Centterr 🔰 💡 🔎 🌔	ABC Chi	ldcare
Claim Information		
September 2021 Center		
		Resubmit Claim
Meals	Rate	Total
Breakfast	1.26818181	515
AM Snack	0.53477272	0
Lunch	2.29022727	489
PM Snack	0.53477272	495
Dinner	2.29022727	0
Eve, Snack	0.53477272	٥
Partie	ipated	
Free		17
Reduced		10
Paid		17
Total		44
Claim Status		
Date Calculated: 11/11/2021		
Date Paid: Not Yet Paid		
Payment Amount: \$1,859.23		

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## Logging into KidKare



Click above to watch a quick video

## Center Sponsors: Steps to Get Started

Below is a list of tasks you should complete as you get started with KidKare. Click each link to jump to the article for more information.

Create Staff-Member Accounts

Confirm Your Company Information



- Enroll Children
- Create Master Menus
- Send Welcome Messages to Your Centers



Scan this code to access the Oklahoma Training Site for Sponsors and SFAs

## Center **Sponsors** Checklist

The basic monthly process with KidKare typically follows the pattern below. Click the image to the right to view a printable version of this document, or use this link.

**For Center Sponsors** CACFP Checklist



🕉 🖕 OKLAHOMA Education



MONTHLY

	0	On the 1st of each month, verify the starting balances/previous month carryover in your milk audit (Sponsor or Site)
DAILY (Sites)		Collect Deview and Finaline Olaines for
Mark Children in attendance		each site in KidKare
During meal service time, mark each child that get served a meal	0	Login to CNP and submit your claim data to the state
Ensure all meals served are entered into the Daily Menu	0	Mark claim as submitted in KidKare and record payment once received
Enter the actual amount of food prepared and served for each meal or snack served	0	Once your claim is finalized and submitted, run the Non-Profit Status Report in KidKare to determine cost of food used (# of claim spend on food
WEEKLY/MONTHLY		OSDE
Enter newly enrolled children and update any children information that	0	Ensure hard copies of receipts, bank statement, and CN Labels are on hand and easily accessible at your site.
has changed (sponsor or site)	0	Review your monthly roster and
Activate any Pending Children before processing claims		longer in your care.
Activate any Pending Children before processing claims Enter all receipts for food program purchases (Sponsor or Site)		ANNUALLY
Activate any Pending Children before processing claims Enter all receipts for food program purchases (sponsor or Site) Review School calendar and mark days school aged children are out of school (Sponsor or Site)	0	ANNUALLY Annually renew enrollments for the new program year. When manually renewing participants, all paper enrollment forms should be stored
Activate any Pending Children before processing claims Enter all receipts for food program purchases (Sponsor or Site) Review School calendar and mark days school aged children are out of school (Sponsor or Site) Run the following Meal & Attendance reports to ensure completion of the previous week (Sponsor & Site):	0	ANNUALLY Annually renew enrollments for the new program year. When manually renewing participants, all paper enrollment forms should be stored onsite with CACFP paperwork. When using eForms in KidKare no forms need to be printed
Activate any Pending Children before processing claims Enter all receipts for food program purchases (Sponsor or Site) Review School calendar and mark days school aged children are out of school (Sponsor or Site) Run the following Meal & Attendance reports to ensure completion of the previous week (Sponsor & Site): • Weekly Attendance + Meal Counts Report • Center Monthly menu Plan	0	ANNUALLY Annually renew enrollments for the new program year. When manually renewing participants, all paper enrollment forms should be stored onsite with CACFP paperwork. When using eForms in KidKare no forms need to be printed Update any changes on manual renewals into KidKare
Activate any Pending Children before processing claims Enter all receipts for food program purchases (Sponsor or Site) Review School calendar and mark days school aged children are out of school (Sponsor or Site) Run the following Meal & Attendance reports to ensure completion of the previous week (Sponsor & Site): • Weekly Attendance + Meal Courts Report • Center Monthly menu Plan Review Milk Audit to ensure enough milk is purchased for the week and inventory totals match (Sponsor or Site)	0	ANNUALLY Annually renew enrollments for the new program year. When manually renewing participants, all paper enrollment forms should be stored onsite with CACFP paperwork. When using eForms in KidKare no forms need to be printed Update any changes on manual renewals into KidKare Complete online sponsor, facility, and budget applications on CNP website. Utilize receipt/finance reports in KidKare to help budget for the next proaram year
Activate any Pending Children before processing claims Enter all receipts for food program purchases (Sponsor or Site) Review School calendar and mark days school aged children are out of school (Sponsor or Site) Run the following Meal & Attendance reports to ensure completion of the previous week (Sponsor & Site): • Weekly Attendance + Meal Counts Report • Center Monthly menu Plan Review Milk Audit to ensure enough milk is purchased for the week and inventory totals match (Sponsor or Site) Build and Review/Assign Menus for the next month (Sponsor or Site)		ANNUALLY Annually renew enrollments for the new program year. When manually renewing participants, all paper enrollment forms should be stored onsite with CACFP paperwork. When using eforms in KidKare no forms need to be printed Update any changes on manual renewals into KidKare Complete online sponsor, facility, and budget taplications on CNP website. Utilize receipt/finance reports in KidKare to help budget for the next program year.

RESOURCES

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 KidKare Email: <u>Oklahoma@KidKare.com</u> KidKare Training Site: https://www.kidkare.com/training-ok/

State CNP Site <u>www.cnp.sde.ok.gov/CACFP</u>

## **Administrative Tasks**

- Sponsor Staff Management
- View Reimbursement Rates
- Manage Company Information

## **Sponsor Staff Management**

### **Create Sponsor Staff Roles**

You can create staff roles with customized permissions. This allows you to set default permission levels for specific staff groups. For example, you can set up administrators, managers, claims processors, monitors, volunteers, and so on. Then, when you create a new staff account, you can simply select the staff type and assign that type's permissions to the user.

- From the menu to the left, click Tools. Select
- **Sponsor User Permissions.** The Sponsor User Permissions page opens.
- . Click the Roles & Permissions tab.
- . Click Add Role.
- Click the *Role Name* box and enter the name for this role.
- Click Save.
- Next, click next to permissions to enable and disable them.
- You can also click Select All to turn on all permissions for this role, or you can click Unselect All to disable all permissions for this role. Your changes are saved automatically.



## Create Sponsor Staff Accounts

All sponsor/back-office staff members should have their own, unique login ID and password with which to access KidKare. You can assign permissions to each individual user, or you can create staff roles. You can customize permissions for each staff roles and then assign that type to the users you create. However, if you have a small staff or want to set permissions for each individual staff member, you do not have to set up staff roles. For more information, see <u>Create Sponsor Staff Roles</u>.

- From the menu to the left, click Tools. Select
- **Sponsor User Permissions.** The Sponsor User Permissions page opens.
- Click Add User. The Add User pop-up opens.
- Click the *First Name* and *Last Name* boxes and enter the user's full name.
- Click the *Email* box and enter the email address for this user if applicable.
- Click the *Role* drop-down menu to assign a role with pre-set permissions to this user. You can customize permissions for this user later, if needed.

- Click Add User. The **User Added** message displays.
- Set a password for the user.
  - -If you provided an email address, click *Email User Instructions* to send the user an email containing instructions for accessing their account.
  - -If you did not provide an email address, enter a password for the user and click **Set Password.**



### Customize Sponsor Staff Permissions

Staff permissions allow you to determine who can access what portions of KidKare. For example, you can restrict certain users from accessing and editing your food list. You can either set default permissions when creating specific staff roles, or you can customize individual user permissions on the User Details page. This article covers setting permissions on the User Details page. See <u>Create Center Staff Roles</u> for more information on creating pre-set permission sets.



- From the menu to the left, click Tools.
- Select Sponsor User Permissions. The Sponsor User Permissions page opens.
- Click next to the user for whom to update permissions. The User Details page opens.
- Scroll to the User Permissions section.

Next, click with next to permissions to enable and disable them. You can also click Select All to turn on all permissions for this user, or you can click Unselect All to disable all permissions for this user. Your changes are saved automatically.

## View Reimbursement Rates

You can view current reimbursement rates for CACFP claims in KidKare.

#### To do so:

- From the menu to the left, click Administration.
- Select *View Reimbursement Rates.* The View Reimbursement Rates page opens.
- Click the **State Type** and choose from the following:
  - 48 Contiguous
  - Alaska Hawaii
  - Washington, DC

• Click the *Effective Month* box and select the year and month to view.

💏 🗇 Administration > View Reimbursement Rates							
Find Records							
State Type 48 Contiguous	effective 07/01/	Month 2024					
Federal Reimbursement Rates				State Supplemental Reimbursement Rates	for CA		
Meals	Free	Reduced	Paid	Meals	Free	Reduced	Paid
Breakfast	2.37	2.07	0.39	Breakfast	0.216	0.216	0
AM Snack	1.21	0.6	0.11	AM Snack	0	0	0
Lunch	4,43	4.03	0.42	Lunch	0.216	0.216	0
PM Snack	1.21	0.6	0.11	PM Snack	0	0	0
Dinner	4.43	4.03	0.42	Dinner	0	0	0
Evening Snack	1.21	0.6	0.11	Evening Snack	0	0	0
Cash in Lieu	0.3						



## Manage Company Information

### **Update Your Login Information**

Update your login information whenever you need by using the *My Account* page.

- In the top-right corner, click your username and select My Account. The *My Account* page opens.
- To update your password:
  - In the User Details section, click the

Click to Reset link.

- Enter a new password.
- Click the checkmark to save your changes.
- To change your username:
  - Click Edit.
  - In the User Details section, click the Username box and enter your updated username.
  - Click Save.





<u>Scan this code to go to the</u> <u>training site to view videos</u>

### **Review Your Account Information**

It's important that your company information is correct, as it prints on various reports. Check and update this information in the Manage Client Information page.

- From the menu to the left, click Administration.
- Select *Manage Client Information*, the Manage Client Information page opens.

Lide	A8. •			Save
egal Business Name *	MM Test	Federal fax Id	012345	
ontact Name	Bob Cruiser	Tate	Orrector	
ite Address *	1234 Test St	Mailing Address		
14 °	Dalles	Cry	Dola	
tate *	CA.	• State	и	
1p Code *	75090	Zip Code		
hore Number *	(214) 555-0330	Alternate Phone		
lax Number				
mail Address	mmestögnal.com	Website Url	https://app.kidkare.com	
esdor #	AID23	State Accigned #	A5123	

- Confirm that the displayed information is correct. Ensure that the State Agreement # is entered in the State Assigned # field.
- If you made any changes, click Save.

Note: If there are fields that need to be updated but they are greyed out and cannot be changed, you need to reach out to OSDE for these changes.



## **Center Management**

- •Enroll & Manage Centers
- •Center Welcome Letter
- Manage Center Staff
- •Remove & Reactivate Centers
- Manage Center Classrooms

## **Enroll & Manage Centers**

### **Enroll Centers**

All centers are pre-enrolled based on data provided by OSDE. When a new center is approved for the food program, OSDE will alert KidKare and the center will be enrolled for you. If any adjustments need to be made to any center details, contact OSDE directly as the center details are read-only and managed by the state to ensure they match what is in the CNP site.

						Peppa's Play	Yard TX #9999 (	#1234 <del>)</del> Co	nter Sponsor	(KidKare
> Center Management > Manage C	enter Information									
ieneral License/Schedule Ove	rsight								Save	Remove Ce
eneral Info and Hours					License Info					
State Site #:	777				License Type: *	Center		• [3]	Add Delet	e
Opening Time:				٥	Program Type: *	Child Care Cer	iter			
Closing Time:				0	Max Capacity: *	Infants	Toddlers	PreSchoolers	School Age	Total
Open 24 Hours:	II) No					20	0	0	0	150
Night Opening:				0	Waiver:	(III) No				
Night Closing:				٢	License #:					
Days Open:	Sun Mon Tue We	d Thu Fri Sat			Site ID:					
Months Onen:	12 selected				Funding Source:	Select				
Montals Open.	12 selected			•	Vicense/CACFP Starting Age: *	0	Years			
eal Schedule					License/CACFP Ending Age: *	13	Years			
Servings:	1 2				Start Date:					6
	Serving 1	Serving 2			End Date:					t
Breakfast:	07:00 AM Ø 09:00 AM	<b>⊘</b> Start	O End	0	Approved Meals: *	Breakfast .	AM Snack Lur	nch PM Snack	Dinner Eve	. Snack
AM Snack:	10:00 AM ② 10:45 AM	<ul> <li>Start</li> </ul>	O End	0	At-Risk/SFSP Participant:					



## Center Welcome Letter

### **Customize the Center Welcome Letter**

You can customize the welcome letter sent to your center admins with a link to their KidKare account.

- Log in to KidKare.
- Click 📫 at the top of the main menu.
- In the General Settings section, click Edit Welcome Letter Template. The Welcome Letter Template pop-up opens.



- Click Edit. Update the Subject and From boxes, as
- needed.

Variables you can use to fill-in certain information are listed at the bottom of the editor (SponsorName, CenterPhone, and so on). To add one of these variables to your text, type @ and begin typing the variable to use. A list of available items displays as you type, so you can select the variable you need. For example, to add the provider's name to the Subject, you would type @CenterName in the Subject box.

Welcome L	etter Template	3
KidKare	Welcome Letter	Minute Menu CX Welcome Letter
ubject *	Welcome to KidKare!	
rom *	SponsorName	
Dear Cent	erName ,	
Welcome to	KidKare! KidKare is a web-b	based application that allows you to manage child attendance
record men	us and meal counts, submit	t your claim, and more. You can log in to KidKare at
Click the lin	k below to log in and set up	your password.
Get Started To get start and print a	ed, we recommend you view guide to KidKare's center fea	w the Introduction to KidKare video <b>here</b> . You can also download atures <b>here</b> .
Additional I If you need Base here.	- <b>lelp</b> additional help using KidKai	ire, check out the center content on the KidKare Knowledge
ignature		
Thank you, SponsorN SponsorP	ame	
'ype @ to inse	rt the tags	
SponsorPhor CenterEmail	e SponsorName Sponso	orAddress SponsorEmail CenterName CenterPhone
ttachments		
www.milencs	No. Add Attachment	
		Cancel Save

•Specify which welcome letter you are sending: The letter marked

with is the active one. To enable the other template, click . Note that the slider turns green and the other letter's slider turns red. You can only have one active welcome letter at a time.

- •Click the first *Message* box and customize your messaging. Just as you did in *Step 5*, you can use variables to complete certain information, such as the center's name.
- •Click the **Signature** box to customize your signature.
- •Click Add Attachment to add any attachments needed.
- When finished, click Save.

### Send Center Welcome Letter

Use KidKare to send welcome messages to centers. This welcome message will either include installation and login information for KidKare. To select the letter to send and customize the content, see <u>Customize the Center Welcome Letter</u>.

- •From the menu to the left, click *Center Management.*
- Select Manage Center Information.
- •Click the **Select Center** drop-down menu at the top of the window and select the center to which to send the welcome letter.
- Verify that the *Email Address* entered in the primary contact info section of the general tab is correct. This is the email that received the welcome letter.
- Click the **Oversight** tab.
- In the Center Login tab, click Send Welcome Letter. The Welcome Letter pop-up opens and displays the text you entered to the Welcome Letter template.

	Letter
To:	Bob Jones
From:	MM Test
Subject:	Welcome to KidKare!
Dear Bob Jo	nes,
Dear Bob Jo Welcome to nus and me most web b	nes, KidKarel KidKare is a web-based application that allows you to manage child attendance record me al counts, submit your claim, and more. You can log in to KidKare at https://app.kidkare.com, using rowsers.
Dear Bob Jo Welcome to nus and me most web b Username:	nes, KidKarel KidKare is a web-based application that allows you to manage child attendance record me al counts, submit your claim, and more. You can log in to KidKare at https://app.kidkare.com. using rowsers.
Dear Bob Jo Welcome to nus and me most web b Username: Click the lini https://app.	nes, kidKarel KidKare is a web-based application that allows you to manage child attendance record me a counts, submit your claim, and more. You can log in to kidKare at https://app.kidKare.com. using rowsers. below to log in and set up your password. idkare.com##/login/resetpasswort.
Dear Bob Jo Welcome to nus and me most web b Username: Click the lini https://app. Get Started	nes, KidKarel KidKare is a web-based application that allows you to manage child attendance record me al counts, submit your claim, and more. You can log in to KidKare at https://app.kidkare.com. using rowsers. below to log in and set up your password. kidkare.com/#/login/resetpasswort.
Dear Bob Jo Welcome to nus and me most web b Username: Click the lini https://app. Get Started To get started t a guide to	nes, KidKarel KidKare is a web-based application that allows you to manage child attendance record me al counts, submit your claim, and more. You can log in to KidKare at https://app.kidkare.com. using rowsers. below to log in and set up your password. kidkare.com/#/login/resetpasswort d, we recommend you view the Introduction to KidKare video here. You can also download and prin Kidkare's caref features here.

- •Make changes to the email, as needed.
- When finished, click Send.



## View & Update Center Information

To access the Manage Center Information page:

•From the menu to the left, click *Center Management*.

Select Manage Center Information.

•Click the Select Center drop-down menu at the top of the window and select the center to view.

- Review the information in each tab and ensure that it is correct for the claim month on which you are working.
- . Click Save to save any changes.

	rogn				Participa Circ
nter Info		Center Basics			
Center Number:	123	State Agreement #:			
Center Name: 1	Jess Center	Abernate E			
Corporation Name:		Federal Tax ID #			
External ID:		Center Title XXX #:			
Status	Active	Center Tride XX #			
Business Type:	Private Non Profit	Current Start Date:			0
Profe Statute	Non-Profit	Current End Date:		12/01/2050	
		Allowed Start Date:			
imary Contact info		Original Start Date:		11/01/2018	
Director's Name:	Bob jones				
Email Address:		Additional Information			
Primary Phone:	(817) 123-4567	Inspection Expirations 😨			
Abernate Phone:	(817)-456-7891	Fire inspection:	Required STEE	11/30/2050	
Fast		Health Inspections	Required State	11/30/2050	
		Sanitation Inspections	Required to 0	11/30/2050	•

Note: Any license details or center preferences in the area are read-only and cannot be modified. To make changes to this data, please reach out to OSDE directly.

- The *Manage Center Information* page opens. This window is divided into three tabs:
  - General
  - License/Schedule
  - Oversight

### Control Center Access to KidKare Features

• Click 🥰 . The Settings page opens.

A CONTRACT			
• • •;	A > Settep		
Coserver Mode	General Settings	*	
ne foots v	What language would you like to use?	English .	
\$ DilingReport	Would you like to require center shall to certify the accuracy of attendance when	1. 36	
& eforms v	saving Attendance & Meal Counts in Kidkare?		
Messages			
O GetHelp ~	eForms Settings	^	
Ungext     Would you like to require stes to approve enrolment forms?		C.	
	Would you like to require sites to approve income eligibility forms?	0000	
	Are sites allowed to send new enrollment requests to parents?	<b>(11)</b>	
	If a parent completes infant feeding details do you want to indicate that the infant form is on file for the child?	(1) 10	
	If a parent indicates they perticipate in SNAR, would you like to require them to provide their SNAP number for validation?		
	Would you like to require SNAP/TWNF number validation for perents to submit their forms?	(1)	
	Center Access	^	
	😂 Kids		
	H Food Program	(III)	
	📫 Calendar	<b>(11)</b>	
	Cairrs	(m)	
	eforms	(m)	
	D Reports	-	
		67T *	
	setup		

- In the General Settings section you can:
  - Click the Language drop-down menu and select Spanish to view KidKare in Spanish.
  - Click I next to Would you like to require center staff to certify the accuracy of attendance when saving Attendance & Meal Counts in KidKare? to require your centers to acknowledge that attendance and meal counts recorded are accurate.



- -Would you like to require sites to approve enrollment forms?
- -Would you like to require sites to approve income eligibility forms? Are sites allowed to send new enrollment requests to parents?
- -If a parent completes infant feeding details, do you want to indicate that the infant form is on file for the child?
- If a parent indicates they participate in SNAP, would you like to require them to provide their SNAP number for validation?
- -Would you like to require SNAP number validation for parents to submit their forms?
  - ° Would you like to disallow or warn the parent of incorrect formatting?
- Would you like to hide the 'Open Online Forms' button?
- In the Center Access section, click next to each option to enable it. You can change settings for the following:
  - ° Kids

° Claims

- Food Program
- Calendar
- eForms Reports Setup
- ° Messages

2



#### Manage the School Calendar

The School Calendar page allows you to add school out days for your sites. This is useful for setting up summer vacation, holidays, or extended school closures. Adding school out dates to the calendar removes the requirement that sites select School Out when checking children in for the day.

You can add school out days per child, center, school, or school district. You can also add school out days for all children and all centers at once.

#### •From the menu to the left, click Menus/Attendance.

Select Manage School Calendar. The School Calendar page opens.

•Choose from the following options:

- All Children, All Centers: Create a school out event for all sites and chidlren.
- **Center:** Create a school out event for a single site. If you select this option, you must select a center at the top of the window.
- Child: Create a school out event for a specific child. If you select this option, you must select a center (top of the window) and a child (to the right of the calendar options).

- School District: Create a school out event for an entire school district. If you select this option, you must select a center (top of the window), a state (if you operate in multiple states), and a school district (to the right of the calendar options).
- School: Create a school out event for a single school. If you select this option, you must select a center (top of the window) and a school (to the right of the calendar options).
- To add School Out days:
  - -From the *Draggable Events* section, click and drag School Out to the calendar, and drop it on the first date of the event. If you are adding a single day, the process is complete.

- If you need to add a date range, double-click the school out event you placed on the calendar. The Event Editor pop-up opens.
- -Select Multi-Day.
- Use the *Event Start Date* and *Event End Date* boxes to update the date range. The Event Start Date defaults to the date on which you placed the event originally.

Event editor			Day Multi-Day
Event Start Date:	06/01/2023	Ê	
Event End Date:	09/01/2023	<u> </u>	

Click OK. The event is added to the dates you specified.



- To remove **School Out** days:
  - Double-click the event on the calendar. The Event Editor opens.
  - \_ Click Delete.
  - At the Are You Sure prompt, click Delete.





#### Set At-Risk Program School Dates

Menus/Attendance > Manage School Calendar

If you sponsor centers who participates in the ARAS program, this is where the ARAS Program school dates are set on the school calendar. These dates are Read-Only and can be modified by reaching out to OSDE directly or emailing <u>Oklahoma@kidkare.com</u>.





## Manage Center Staff

### Add Center Staff

To add center staff members:

•From the menu to the left, click Tools.

- •Select Center User Permissions.
- •Click the **Select Center** drop-down menu at the top of the window and select the center for which to add users.

Click Add User. The Add User pop-up opens.

After a user is added you will be able to customize their add additional user information.	permissions and
First Name	
Last Name	
Email	

- Click the *First Name* and *Last Name* boxes and enter the user's first and last name.
- Click the *Email* box and enter the user's email address.
- Click the *Role* drop-down menu and select the user role to assign to this user.
- Click Add User. The User Added message displays.
- Set a password for the user.
  - -If you provided an email address, click *Email User Instructions* to send the user an email containing instructions for accessing their account.
  - -If you did not provide an email address, enter a password for the user and click **Set Password.**



### **Create Center Staff Roles**

*Note*: This article is for adding center staff roles as a sponsors of centers. If you operate in an independent center or are a sponsored center user needing to set up user roles and permissions, see *Set User Permissions*.

Each user role is a combination of certain permissions settings that you can customize. If you customize one of the existing user roles, the word -Custom is added to the end of the role to designate that you have edited the permissions for that role. For example, if you customize the permissions for the Teacher role, the role becomes Teacher - Custom. You can also add new user roles that you can then assign to new and existing users.

- From the menu to the left, click Tools.
- Select Center User Permissions.
- Click the Roles & Permissions tab.
- Click Add Role.
- Click the *Role Name* box and enter a name for this role.
- . Click Save.
- Next, use the sliders next to each permission to enable it for this role. All permissions for new roles are set to No by default.



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#### Set Center Admin Permissions

You can control what areas of KidKare a center's administrator can access.

- From the menu to the left, click Tools. Select
- Center Administrator Permissions. The Center Administrator Permissions page opens.
- Use the sliders to toggle permissions on and off. Your changes are saved automatically.

> Tools > Center Administrator Permissions					
When center admins log into Minute Menu, they note: For these settings to take effect, Policy A.12	vill have access only to those must be "Y". Otherwise, cerr	r areas you specify here. ters will have access to all these areas regardless what is che	cked here.		
Center Administrator Permissions					^
Attendance		Recepts		Ciarra	
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Children		Reports		Reports	
Assign Cassrooms	(m. L)	Attendance: Actual vs Estimate Neal Count Summary		Children: Child Roster	<b>(11)</b>
Charge Child Number	<b>(m)</b>	Attendance: Blank Attendance + Meal Count Worksheet	-	Children: Children Claimed Without Absence	(MK U)
Delete Children	(Yo ()	Attendance: Daily Attendance + Meal Count Report	<b>()</b>	Children: Children Not Claimed	(m)





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## Remove & Reactivate Centers

#### **Remove Centers**

You can remove/deactivate centers from your active list of centers. Centers that you have removed can no longer access KidKare.

#### To do so:

- •From the menu to the left, click *Center Management.*
- Select Manage Center Information.
- •Click the **Select Center** drop-down menu at the top of the page and select the center to remove. The Manage Center Information page opens.
- •Click *Remove Center* in the top right corner. The Remove Center pop-up opens.
- •Click the *Withdrawal Date* and select the date on which to remove this center. This box defaults to today's date.
- •Click the *Removal Reason* drop-down menu and select the reason you are removing this center.

	Jeri's Jelly Beans (#4)	Center Sponsor 🔑 (OSDE Agency (OSDE) 🗸
🕐 > Center Management > Manage Center Information		
General License/Schedule Oversight		Save Remove Center
Center Info	Center Basics	
Center Number: * 4	State Agreement #:	
Center Name: * Jori's Jolly Boans	Alternate #:	
Corporation Name:	Federal Tax ID #:	
External ID:	Center Title XX #:	
Status: Active	Center Title XX #:	
Business Type: Select •	Current Start Date:	Select a day
Profit Status: + For-Profit *	Current End Date:	Select a day
	Allowed Start Date:	Select a day

- Click Continue.
- At the *Center Removed Successfully* message, click *Close*.

*Note*: To view information for centers you've removed, check the Removed box in the Select Center drop- down menu to include Removed Centers in the menu.

### **Reactivate Removed Centers**

After you've removed a center, you can re-activate them if needed. Perhaps the center closed at one point, but decided to resume business. Maybe they switched sponsors, but are returning to you. No matter the reason you removed the center, you can reactivate them at any time.

- •From the menu to the left, click *Center Management.*
- •Click Manage Center Information.
- •Click the Select Center drop-down menu, clear the *Active* and *Pending* boxes and check the Removed box. This filters the Select Center list to removed centers only.
- •Select the removed center to reactivate. The Manage Center Information window opens. Click *Reactivate Center*.
- •At the Are You Sure prompt, click Yes.
- •At the Center Reactivated prompt, click Close.

Jeri's Jelly Beans (#4) 🔻	
∽ Clear	
<b>Q</b> Search	
🗌 Active 🗌 Pending 🗹 Removed 🗌 All	



## Manage Center Classrooms

### Add Classrooms

- •From the menu to the left, click *Center Management.*
- •Under Classrooms, select Manage Classrooms.
- •Click the Select Center drop-down menu at the top of the window and select the center for which to add classrooms. The Manage Classrooms page opens.
- •Click Add Classroom. The Add New Classroom pop-up opens.

- •Click the **Short Name** box and enter a short name for this classrooms.
- •Click the *Full Name* box and enter the classroom's full name.
- •Click the *Building Name* box and enter the building in which this classroom is located, if applicable.

		+ Add Clas	sroon
Short Name	Full Name	Building Name	
Banana	Banana	N/A	
Berries	Berries	N/A	
Infant	Infant	N/A	
None	Unassigned	N/A	
School Age	School Age	N/A	
Withdrawn Children	Unassigned	N/A	

### **Edit Classrooms**

- •From the menu to the left, click *Center Management.*
- •Under Classrooms, select Manage Classrooms.
- •Click the *Select Center* drop-down menu at the top of the window and select the center for which to add classrooms. The Manage Classrooms page opens.
- •Click the classroom to update. The Edit Classroom pop-up opens.
- •Update the classroom name information, as needed.
- •When finished, click Save.

### **Delete Classrooms**

- •From the menu to the left, click *Center Management.*
- •Under Classrooms, select Manage Classrooms.
- •Click the *Select Center* drop-down menu at the top of the window and select the center for which to add classrooms. The Manage Classrooms page opens.
- •Click the classroom to delete. The *Edit Classroom* pop-up opens.
- Click Delete.

*Note*: You can only delete classrooms to which children are not currently assigned. If a classroom has children assigned to it, the Delete option does not display.



### Assign Classrooms

- •From the menu to the left select *Center Management.*
- •Under Classrooms, select Assign Classroom.
- •Click the Select Center drop-down menu at the top of the window and select the center for which to add classrooms. The Assign Classrooms page opens.
- Check the box next to each child to assign to a classroom.

	Jasmine, Princess	4y8m	Toddlers
	Waialiki, Moana	4y11m	Toddlers
	Aladdin, Prince	5y0m	Toddlers
	Nancy, Fancy	Sy6m	Bumble Bee
	Moon, Stanley	Sy6m	Bumble Bee
	Kitty, Hello	5y7m	Bumble Bee
9	Pig, Peppa	5y9m	Bumble Bee
	Little, Chicken	6y1 m	Bumble Bee
	Monster, Cookie	бубт	After Schoolers
	Cat, Cheshire	7y5m	After Schoolers
	Smash, Hulk	7y6m	After Schoolers

- Click Assign Classrooms. The Assign Classrooms pop-up opens.
- Click the *Assign* drop-down menu and select the classroom to which to assign the children.

Assign Classr	ooms	>
Assign	After Schoolers	
То	12 children	
	Kitty, Hello	
	Pig, Peppa	
	Little, Chicken	
	Monster, Cookie	
	Cat, Cheshire	
	Coyote, Wile	
	Smash, Hulk	
	Cat, Tom	
	Potter, Harry	
	Explorer, Dora	



Click Save.

## Observer Mode

### What is Observer Mode?

Observer Mode gives sponsors the ability to login and observe each site in a "view only" mode.

### How do I access Observer Mode?

- Login to KidKare.
- Select Observer Mode from the menu on the left.
- · Click on the site you want to observe.

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- The home page for the selected site opens. You are now in Observer Mode for the selected site.
- Once you are done reviewing this site, click Exit Observer Mode in the top right corner. You will return to the list of sites an be able to select a different site to observe.





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## Children

- •Enroll Children in KidKare
- Activate Children
- •Withdraw Children
- Transfer Children Between Centers
- •Delete or Merge Child Data
- •Child Rosters
- •Edit Child Information

## **Enroll Children in KidKare**

You, the sponsor, and centers can both enroll children. Centers can also import CDT children from another program, such as Procare. When centers enroll children, those children are automatically set to Pending, You must review and activate these children. For more information, see Activate Children.

*IMPORTANT*: Check with your center to see if they have Procare before you enroll children. Do not enroll children if your center is planning to import from Procare, as this can result in duplicate records. Sent an email to *Oklahoma@KidKare.com* and request a Procare integration.

- From the menu to the left, click Children.
- Select Enroll Child.
- Click the Select Center drop-down menu at the top of the window and select the center for which to enroll children. The Enroll Child page opens. The page is broken into three (3) steps with separate sections, as shown in the image below.



### Enrolling Participants

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- In the Personal Details section: Click the First Name, Middle Name (optional), and Last Name boxes and enter the child's full name.
  - In the Ethnicity section, check the Hispanic/Latino box or the Not Hispanic box.
  - In the *Race* section, click with next to each option that applies.
  - Click the *Child* # box and enter a child number, or accept the system-generated number. You can enter up to four characters in this box.
  - -Click the *Classroom* drop-down menu and select the classroom to which to assign this child. You can also enter a new classroom name.
  - \_ Click the *Birth Date* box and select the child's
  - date of birth. Their age displays to the right of this box automatically.
- In the In/Out Times section:
  - Select the Meals for which this child participates.

- Click next to *Will pick up and drop off times vary?* to indicate that pick up and dropoff times may vary from what is entered here.
- Click (III) next to Overnight Approved? If this child is approved to remain in care overnight.
- Select each day the child will be in care and enter their in and out times in the corresponding box that display.
- In the *Enrollment Details* section, select the child's *Enrollment Date, Enrollment Expiration Date, and IEF Expiration Date.* The Enrollment Date box defaults to today's date. Expiration defaults to 9/30.
- If this is an infant, complete the Infant Food Details section. If this is not an infant, continue to the next point.
  - -Click the Formula Offered box and enter the formula offered to this child.
  - Click U next to each of the options below that apply:
    - ° Will the parent provide breastmilk?
    - ° Will the parent provide formula?
    - ° Will the parent provide food?


-Click (III) next to *Infant Form of File* to indicate you have an infant form on-file for this child. This refers to the infant information on the enrollment form,

- Next, complete Special and Diet Information sections, as needed. Click III next to each option in these sections that apply to the child you are enrolling. You can also add a Diet Expiration Date and Notes to the child's Diet Information.
- In the *Doctor Information*, enter the child's primary care physician's name and phone number, if needed.
- If this is a school age child, it is optional to complete the School Details section. If this is not a school age child, go

to next point.

- -Click the **School Name** drop-down menu and select the school this child attends.
- -Click the **School District** drop-down menu and select the child's school district.
- Click the School # box and enter the school's identifying number.
- Click the *Type/Level* box and select the child's
   school level. You can also select No School or School Age.

- In the Pay Details section:
  - -Click the *Pay Source* drop-down menu and select Paid by County/State, Paid by Parent, or No Pay.
  - Click the **Start** and **End Date** boxes to set dates for this payment method.
  - Click the Additional Notes box and enter any additional notes about the pay details for this child.
- Click Next. The Primary Guardian form displays.

<b>O</b>	(2)	
imary Guardian		
Id you like to add an existing contact or create a new one?		

- Add a primary guardian.
  - Click *Existing* to select an existing parent/guardian. Then, select the contact.
  - Click *New* to add a new parent/guardian and enter their information.
- Click *Next.* The final enrollment page opens. If any siblings are found (children with the same parent), they display in the Siblings and Children (Same Parent) section.

	0		-00				
Reimbursement/ Chil	d Details		Siblings and Children (same Pare	nt)			
Reimbursement Level Prp Eligibility Basis Tatle XXXXXX Reparation	Free Reduced Paid	Request new ISF	Last Name <sup>8</sup> First Name <sup>8</sup> Dob <sup>8</sup> Age No record found	1 B H9P Type B H9P Reason B H9P Expires B Status B			
Qualifying Program #			Additional Details				
Sponsor Notes			Child Participates Notice Pending Birrekfast Documentation Received? License Switch	0.00 0.00 0.00			

- In the Reimbursement/Child Details section:
  - -Select the child's reimbursement level: *Free*, *Reduced*, *or Paid*.
  - Click the FRP Eligibility Basis drop-down menu and select the basis for the child's reimbursement level.
  - Check off if the child is *Title XX/XIX* and enter a *Qualifying Program #*, if needed.
- Click the Sponsor Notes box and add any additional notes about the child's reimbursement details.
- In the Additional Details section, click (III) next to each option that applies.

• When finished, click *Enroll Child.* The Manage Child Information window opens and displays the information you completed. Children you enroll as a sponsor are automatically set to Active status. You can update the child's status as needed in this window.

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Date of Bin	h: 11/06/2021	Day	Schedule	
Original En	rollment Date: 07/12/2023	Monday 🥑	08:00 AM - 05:00 PM	
D. Envolment	Date: 07/12/2023	Tuesday 🥑	08:00 AM - 05:00 PM	
Envolment	Expiration: 07/31/2024	Wednesday 🥝	08:00 AM - 05:00 PM	
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# Activate Children

When centers enroll children, the children are automatically set to *Pending* status. Sponsors must then review and activate these children. There are two ways to enter categorical eligibility (FRP rates) and activate children: One at a time or multiple at a time.

## Activating Multiple Children at a Time

- From the menu to the left, click Activate Children.
- Use the *Find Records* section to filter the records that display.
  - Choose whether to activate children for All Active Centers or the Selected Center. If you choose the Selected Center option, click the Select Center drop-down menu at the top of this page and select the center.
  - -Click the *Exclude Children if Enrollment Finalized* drop-down menu, select Before or After, and then select a date in the corresponding date field.

- -Check the *Include Withdrawn Children Who Were Never Activated* box to include withdrawn children who were never activated.
- Click Go to apply your filters.
- Check the box next to each child to activate. You can also check the box in the table header to select all displayed children. Double-check your selections before proceeding, as this action cannot be undone.

Al ACM	Center Centers	Exclude Oxidnen if Enrollment I Please select	+	B1120203	Citobule Webdown of them who remember	tr Advided 60				
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Click Activate.

## Activating Children One at a Time

- From the menu to the left, click Activate Children.
- Use the *Find Records* section to filter the records that display.
  - Choose whether to activate children for All Active Centers or the Selected Center. If you choose the Selected Center option, click the Select Center drop-down menu at the top of this page and select the center.
  - -Click the *Exclude Children if Enrollment Finalized* drop-down menu, select Before or After, and then select a date in the corresponding date field.
  - -Check the *Include Withdrawn Children Who Were Never Activated* box to include withdrawn children who were never activated.
  - Click Go to apply your filters.
- Click a child's name to access the *Manage Child Information* page.
- Review the child's information and select Active at the top of this page. Your changes are saved automatically.



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## **Activate Pending Children**



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# Withdraw Children

When a child leaves a child care center, they should be withdrawn from the program. Withdrawing a child removes them from future rosters. However, you can still access a withdrawn child's information and claim history.

- From the menu to the left, click Children.
- Click List Children.
- Use the Find Records section to filter the records that display.
  - Choose whether to activate children for All Active Centers or the Selected Center. If you choose the Selected Center option, click the Select Center drop-down menu at the top of this page and select the center.
  - -Click Status drop-down menu and select a child status of All, Enrolled, Pending, Enrolled & Pending, or Withdrawn.
  - Click Go to apply your filters.
- Use the blank fields to search for the child that is being withdrawn.

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- Click on the name of the Child to withdraw.
- Click Withdraw.
- Enter the date of the last day this child was in care.



• Click Withdraw again.

# Transfer Children Between Centers

You can transfer children from one center to another with the Copy Child feature. Once you copy the child to the new center in which they are enrolled, you must withdraw the child from the original center.

- From the menu to the left, click Children.
- Select Copy Child. The Copy Child window opens.
- Click the *Child Name* drop-down menu and select the child to copy.
- Click the Destination Center drop-down menu and select the center to which to copy the child.
- Click *Copy*. The child is copied to the new center. If the child is no longer attending the original center, you should withdraw them from that center.

🖌 > Children > Copy Child	
Copy Child	
1. Select a child from the selected center you	u wish to copy.
Child Name	
Appleseed, Johnny	
2. Select destination center you wish to copy	the child.
Destination Center	
Betty's Child Care	
Cancel	Copy Child



# Delete or Merge Child Data

If you mistakenly entered a child into KidKare twice, you may need to delete the child record entirely, or merge the child records.

- From the menu to the left, click Delete Child.
- Click the **Select Center** drop-down menu at the top of the window to select the center from which to delete a child.
- Click the Select a Child drop-down menu and select the child to delete.



- Click Delete.
- If the child you selected has either been claimed or has household income entered, you are prompted to merge the child into another record.

- -Click **Yes** to proceed with merging the child. Go to the next step.
- Click *No* to delete the child. The child is deleted and you can now exit this page.
- At the Select prompt, click the drop-down menu and select the child record in which to merge the child you selected for deletion.



 Click Merge Child. All of the previous child's records are merged into the child record you selected.

# Child Rosters

There are two versions of the child roster in KidKare: a sponsor version and a center version. The center version displays all enrolled and pending children. The sponsor version displays all children who were included on the claim for the selected month.

- From the menu to the left, click *Reports*.
- Click the Select a Category drop-down menu and select Children.
- Click the Select a Report drop-down menu and choose from the following:
  - Child Roster
  - Child Roster [Center Version]
- Click the Month box and select the claim month for which to run the report.
- Click the Select Center drop-down menu and select the center for which to print the roster:
  - Select *All Active Centers* to print rosters for all centers currently set to Active status.

-Select Choose Multiple Centers to set filters for the centers to include. When you select this option, the Filter for Center(s) and Select Center(s) sections display. You can filter by Status (required), State (required - if you operate in multiple states), City, and more. Use the drop-down menus to set filters, and then click Search. Then, check the box next to each center to include in the Select Center(s) section.

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- Select a single center for which to print the report.



- If you are printing rosters for multiple centers, specify a sort. You can select Center Name or Center Number.
- Next, generate the report:
  - -If you are printing a single roster, click *Run.* The report downloads as a PDF.
  - If you are printing rosters for multiple centers, click *Export.* The report downloads as a PDF.

Historic Child Roster: Per	opa's Play Yard	TX #9	9999 (12	34)						Test Ch	nildcar	e Services
LICENSE:	Center											
Claim Month March 2025		F:	11	R: 7	P:	4	N:	0		NP: 0	%(F+F	t): 81.82%
	From Roster:	F:	50.00%	R: 31.8	2% P:	18.18%		Ros	ter Co	unt: 22		
Name	Class	/#	Age	DOB	Enrolled	Expires	FRP	tXX	Basis	IEF Exp	Race	Withdrawn
1. Aniston, Jennifer	School Age	122	7y 2m	01/01/18	12/21/21	10/31/25	R	N	Inc	09/30/25	i	11/30/22
2. Baldwin, Brother	Berries	207	0y 5m	10/01/24	10/11/24	10/31/25	P	N	FS	04/10/25	i	
<ol><li>Bates, Chadwick</li></ol>	Banana	7	3y 5m	09/26/21	09/26/21	01/31/26	R	N		09/30/25	В	
4. Bing, Chandler	Banana	10	2y 8m	06/15/22	10/01/22	10/02/28	R	Ν	Inc	09/30/25	В	
5. Boudreaux, Phillip *P	Berries	210	3y 7m	07/09/21	07/19/24	07/31/25	R	N	Oth		W	
6. Clarkson, Kelly	School Age	117	7y 2m	01/01/18	11/11/21	11/30/26	F	Ν	Inc	12/31/26	W	11/30/22
7. Clooney, George	School Age	108	1y 2m	01/01/24	09/30/24	09/30/25	P	Ν	Inc	01/01/25*R	W	
8. Cox, Courteney	School Age	119	1y 4m	10/10/23	11/22/23	11/30/26	F	N		12/31/26	A	
9. Elliot, Sam	School Age	142	6y 2m	01/01/19	03/28/22	10/31/25	F	Ν		09/30/25	i	
10. Jackson, Angelina	Banana	152	3y 2m	01/01/22	07/12/22	10/31/25	F	Ν		09/30/25	W	07/31/24
11. K, Test *P *I	Withdrawn (	213	0y 4m	10/23/24	03/12/25	03/31/26	F	Ν			н	
12. Mattias, Bruno	Banana	3	4y 1m	01/02/21	01/30/21	01/31/26	F	N	FS	07/31/25	В	
13. McEntire, Reba	School Age	62	7y 10m	04/07/17	01/27/21	10/31/25	R	N		09/30/25		
14. Paige, Riley *P	School Age	181	7y 2m	01/01/18	05/01/24	05/31/25	F	N	Inc	09/30/25		
15. Pratt, Chris	School Age	120	6y 2m	01/01/19	11/29/21	11/30/26	Р	N		09/30/24*R	W	
16. Robert, Julia	Banana	158	2y 3m	12/01/22	12/15/22	01/31/26	F	N	Inc	09/30/26	W	
17. Sanders, Blair *P	Banana	208	3y 3m	12/01/21	04/29/24	04/30/25	F	N	Inc			
18. Smith, Emmitt	School Age	137	5y 8m	07/01/19	01/27/24	11/30/25	R	N		09/30/25	i	01/31/23
19. Turner, Teddy	Banana	170	1y 10m	05/01/23	06/06/23	11/30/26	P	N		12/31/26	;	
20. Washington, Denzel	School Age	19	1y 1m	01/25/24	06/25/24	06/30/25	F	N		09/30/26	В	
21. Willis, Bruce	School Age	143	6y 2m	01/01/19	04/04/22	04/30/25	R	N	Inc	09/30/26	6	
22. Yang, Christina	Berries	20	1y 0m	02/14/24	11/16/24	11/30/25	F	N	Inc	09/30/25	В	11/30/22

# Edit Child Information

As a sponsor you have access to review and edit child information whether you are updating a guardian email address, adding a new allergy, or updating enrollment information. Note that these are the same steps a center would follow to edit child information.

- From the menu to the left, click Children.
- Click Manage Child Information.
- In the top right corner, select the Center for the child that needs to be updated.



- Use the filters to narrow down your search
  - Choose whether this participant is *Active*, *Pending*, *or Withdrawn*.
  - If you choose Withdrawn, you must enter a date into the After date field. This is to search for all children withdrawn after the date you select.

- Use the Select a Child drop down to choose the child to edit.
- Select the child's name in the dropdown.



- From this screen, use the orange *Edit* buttons to edit the child information.
- Click Save.



# Menus & Attendance

- ° Menu Templates
- ° Create a Master Menu
- ° Record Individual Center Menus
- ° Understand the Menu Calendar
- ° Daily Menu
- ° How to Record Actual Quantities
- ° Menu Examples
- ° Menu Reporting
- Adjusting Grain Ounce Equivalents
- ° Manage Menu Footers
- Manage Formula Types
- ° Center Attendance and Served Meals
- ° Recording Meals for Infants
- ° Manage School Calendar

# Menu Templates

You can use Menu Templates to create cycle menus in KidKare. Once your Menu Templates are built, you can then add them to the Daily Menu easily without having to build them out week by week.

This feature is not required, but is a big time saver if you have cycle menus or meals that you serve often.





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## Creating Menu Templates on the Menu Templates Page

- From the menu to the left, click *Menus/Attendance.*
- Select *Menu Templates.* The Menu Templates page opens.
- At the top of the page, select *infants* or *Non-infants*.
- Click Add Menu.
- Click the Which Meal Would You Like to Add drop-down menu and select Breakfast, Snacks, or Lunch/Dinner.
- Click the *What is the Name* of *This Menu* box and enter a name for this menu.

*Note*: When naming your Menu Templates, keep in mind that this is what you, your staff, and your guardians will see on the Menu Calendars you post or send out. Best Practice is to use names that describe the meal such as "Lasagna and Veggies" or "Egg Burrito with salsa".

- Click each drop-down menu and select the appropriate meal components.
- When finished, click Save.

#### **Edit Menu Templates**

From the menu to the left, click

- Menus/Attendance.
- Select *Menu Templates.* The Menu Templates page opens.
- Locate the menu to change.
- Click v next to the menu to edit. The menu details display.
- Click Edit.
- Select new foods and enter a new menu name, if needed.
- When finished, click Save.

## **Delete Menu Templates**

- From the menu to the left, click *Menu Templates.* The Menu Templates page opens.
- Click 🔇 next to the menu to *delete*.
- At the confirmation prompt, click Delete.

# **Create Master Menus**

You can create centralized menus for individual site use. First, create one or more master menu plans. Then, release them to the sites you choose. Once sites receive the master menu, they can print the Menu report and post it in their center for staff and parents to see.

The master menu feature was designed to be used for multiple sites that are using the same menu, such as those with a central kitchen, to make menu planning easier. If an individual center has its own menu plan that differs from other sites, there is no need to create master menus. Your center can plan their own menus from their own account.

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## **Adding Master Menus**

•From the menu to the left, click Menus/Attendance.

- Select *Master Menu Calendar*. The *Master Menu* Calendar page opens.
- •Click the Menu Name drop-down menu and scroll to the *Enter New Master Menu* box.
- Click the *Enter New Master Menu* box and enter a name for the menu to create.
- Press Enter.
- •Double-click the date on which the menu should be served.
- Click the meal type to expand the section. For example, if you're adding lunch, click Lunch.
- Use the drop-down menus in the *Non-Infants* and/or *Infants* section to select the components for this meal.

Master Menus - Create, Assign, & Copy



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## Copy & Paste Menus for a Single Day

- •From the menu to the left, click *Menus/Attendance.*
- Click Master Menu Calendar.
- •Select the *Master Menu Name* you want to copy menus from.
- Click Menu Actions in the top-right corner.

Menu Name Master Menu		Septer	nber 2023 < > today		Actions
Mon		Tue	Wed	Thu	Pri
	4	5	6	7	

- Select Copy.
- The Copy Menus pop-up opens.
- Select Infants, Non-Infants, or both.
- Click Day.



- Click the Select a Day box and enter the day to copy. You can also click to select the date from a calendar.
- In the How Often Should Menu Repeat field, specify how often this menu should repeat: Daily, Weekly, or Monthly).
- Set up repetition frequency according to your selection in the How Often Should Menu Repeat field.

•Specify when to stop repeating this menu:

- End After: Select the End After option. Then, click the Occurrences box and enter the number of occurrences.
- End By: Select the End By option. Then, click the Select a Day box and enter the date on which to stop repeating the menu.
- Click Continue.
- •At the confirmation prompt, review your selections and click *Copy Menus*.

## Copy & Paste Menus for Multiple Days

- •From the menu to the left, click Menus/Attendance.
- Click Master Menu Calendar.
- •Select the *Master Menu Name* you want to copy menus from.
- Click Menu Actions in the top-right corner.

enu Name Master Menu		Septer	ber 2023 < 🔸 today		Actors Actors
Mon		Tue	Wed	Thu	Fri
	4	5	6	7	

- Select Copy.
- The Copy Menus pop-up opens.
- Select Infants, Non-Infants, or both.
- Click Multi-Day.



- In the What Days Would You Like to Copy Your Menus From section, select the days you need to copy. Enter the first date in the first box, and enter the last date in the second box. You can also click to select dates from a calendar.
- Click the *Begin Pasting On* box and enter the day on which to begin pasting your menus. You can also click to select dates from a calendar.
- Specify whether to skip weekends. Weekends are set to skip by default.
- . Click Continue.
- •At the confirmation prompt, review your selections, and click *Copy Menus*.



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## Assign Menus to Sites

Once you have finished your Maste Menu for the month, you will assign the menu to the proper centers.

- •From the menu to the left, click *Menus/Attendance*.
- Click Master Menu Calendar.
- •Select the *Master Menu Name* you want to copy menus from.
- Click Menu Actions in the top-right corner.

Menu Name	Master Menu •	Septem	ber 2023 < 🔶 today		Attors
	Mon	Tue	Wed	Thu	Fri
	4	5	6	7	

- Select Assign.
- The Assign pop-up opens.
- Select which centers will get this menu, click **Save.**

\$	# \$	Name \$	Current Master Menu
	14	Alicia TEST Center	Center Master Menu
	16	Angela TEST Center	Center Master Menu
•	6	Brittany TEST Center	Center Master Menu
	3	CC Center 1	Center Master Menu
	12354	Childcare Plus, LLC	Center Master Menu
	15	Dana's Summer	Center Master Menu
	10	David TEST Center	Center Master Menu
	11	Debbie TEST Center	Center Master Menu
	456	Goslings Center	Center Master Menu
	6542	guide creation	Center Master Menu
	16	Janet's Jamboree	Center Master Menu

Click Menu Actions again, select Send.



- Click Menu Actions again, select Send.
- A confirmation pops-up, click **Yes**, then ok.

# **Record Individual Center Daily Menus**

You can record menus for any selected center, if needed. Note that these are the same steps a center would follow to record menus themselves in KidKare.

•From the menu to the left, click Menus/Attendance.

- Select Center Daily Menu.
- •Click the **Select Center** drop-down menu at the top of the window and select the center for which to enter menus.
- Click the date box and enter the date for which to record a menu.
- Click Non-Infants or Infants.

•Click V to expand a meal. Click A to collapse it again.

Select the appropriate meal components. You can also click *Menu* to select a saved menu template. A message displays when the meal pattern requirements for the meal type have not been fulfilled by the menu. Once the meal pattern guidance has been satisfied, and the required number/types of components are associated with the meal, the error no longer displays. You can click *Create Menu* to save this meal as a menu template.



> Menus/Attendance	<ul> <li>Center Daily Menu</li> </ul>					
07/13/2023	2	Infants Non I	stants		Menu Production Record	d Estimate Attende
reakfast Me	tal Time: 08:00 AM - 09:00 AM					<b>*</b>
Menus Create Me	ru -					B Delete O Sa
			Actual Quantity Served		Attendance Summary	
sat/Alternate	Scrambled Eggs	•	0	Aan	Estimated	Actual
ad'Alternate	English Muffin (007)		0	t yr	0	0
	is this whole grain-rich? (II) Tay)			2.97	0	0
	Calculate Oz Eg for 1 Serving			3-5 yr	•	0
stables			0	6-12 yr	0	0
				13-18 yr	٥	0
	Bananas (004)	•	0	Adult	0	0
	116 Milk		0	Total	0	0
ud Puttern Require	Record Leftner Quantities			Menu Notes		
Snack Me	al Time: 09:00 AM - 11:00 AM					1
ienus -						8 Delete 0 Se
			Actual Quartity Served		Attendance Summary	
sowdernate			0	<i>ben</i>	Estimated	Actual
ad/Alternate			0	t pr	0	0
				2 w	0	0

- If you are recording a *Bread/Alt or Infant Cereal* and need to override the ounce equivalents calculation saved to the food list to accommodate brand differences, click *Calculate Oz Eq for 1* Serving under the Bread/Alt or Infant Cereal food item. Enter the updated serving from the nutrition label and click Save.
- If this center has participants over the age of 18 enrolled, the Adult Meal Pattern Substitutions section displays.
  - Click w next to Was yogurt substituted for milk? If you substitute yogurt for milk at this meal.
  - Click was next to Was mil served to adults? If milk was served to adults at this meal.

- Click Estimate Attendance to estimate attendance for this meal.
- Click the Menu Notes box and enter any notes about this meal, if needed.
- Click Save.



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## Center Daily Menu for Sponsors



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# Understand the Menu Calendar

Use the Menu Calendar to schedule future menus, review menus a month at a time, and use as a visual of any missing components or meals. Note that these are the same steps a center would follow to record attendance and meal counts themselves.

To access the menu calendar:

- •From the menu to the left, click *Menus/Attendance*.
- Click *Center Menu Calendar.* The Menu Calendar page opens

KidKare					Single Site 🖉 (Jordan Berky (JBerky2.)
<b># = </b> 0;	😤 > Menus/Attendance > Menu Calendar				Filte
🔊 Children 🗸 🗸	May 2023 < > today		Infants Non-Infants		Copy Mercu
🗹 eforms 🗸 🗸	Mon	Tue	Wed	Thu	Fri
Menus/Attendance >	BALP	BALP	BALP	BALP	BALP
- Attendance & Meal Counts					
- Daily Menu					
<ul> <li>Menu Templates</li> </ul>					
- Mik Audit	4 <u>1</u> 2	বুট	<u>5</u>		
- Food List		8	9	10	11
Menu Calendar	BALP	B A L P	BALP	BALP	B A L P
🛗 Calendar					
🗒 Claims 🗸 🗸					
Accounting ~		50			
\$ Dipenses ~		15	16	17	18
Reports	BALP	B A L P	BALP	B A L P	B A L P
🛱 Setup 🗸					
Messages					
Get Help		A			
🖞 Logout		22	23	24	25 2
	8 A L P	B A L P	BALP	8 A L P	BALP



## **Calendar Display**

You can update the calendar display to suit your needs.

- Click Infants or Non-Infants to toggle between infant and non-infant menus. This option only displays if you have recorded meals and attendance/meal counts.
- Click Filters in the orange bubble in the top-right corner of the page to update what displays on the calendar:
  - -Weekends: Click Show to show weekends, and click Hide to hide weekends. Hiding weekends removes Saturday and Sunday from the calendar and expands the weekday columns. This is especially useful when viewing the calendar on a mobile device.
  - -View Warnings: Click each warning you need to see on the calendar. You can show or hide warnings that display for the following:
    - ° Menu Incomplete
    - ° Missing Estimated Attendance
    - ° Quantities Insufficient

-Show Warnings As: Click Icons to show menu warnings as icons, or click Text to show menu warnings as text. The calendar displays all menu warnings as text by default. This allows you to become familiar with the warning messages. For more information, see the Menu Warnings section below:



- •Click a day to access the Daily Menu page for that day. You can also click an empty date to add a meal to a day where meals have not yet been planned or served.
- •Menu warnings display for menus that have been entered, but need additional information or have problems that may cause the meal to be disallowed. These warnings are specific to the menus you entered and have no correlation to any claims processing errors.

•Click and to move between months. You can also click *Today* to return to today's date.

## Calendar Warnings

Menu warnings always display in the following order:

•Menu Incomplete: This warning displays when a meal is scheduled for the day and does not have all of the required components to be creditable under CACFP regulations. For example, if a lunch is scheduled and does not have all five (5) menu components, this alert displays on the calendar. Also, the affected meal is outlined in red on the calendar.

- •Menu Incomplete: This warning displays when a meal is scheduled for the day and does not have attendance estimated.
- Quantities Insufficient: This warning displays for only those centers who are required to enter actual quantities served when a meal is/was scheduled for the current day or for a prior day, and actual quantities served have not been recorded or there was not enough served. This never displays for future dates, and it does not display for those centers who are not required to enter actual quantities served.



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## Center Menu Calendar for Sponsors



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# **Record Actual Quantities Prepared**

Recording *Actual Quantities Served* is required by your state and must be done for each meal prior to submitting your claims.

## **Record Actual Quantities**

- Go to the *Daily Menu* page. There are two ways to do this:
  - -From the menu to the left, click Menus/Attendance. Then, click Daily Menu.
  - -From the menu to the left, click Calendar. Then, double-click the day for which to estimate attendance.
- Click *Non-Infants* at the top of the page to show the correct menu.
- Click 
   in the Actual Quantities Served column. The Enter Quantities Served pop-up opens and only displays those menu components where a food item was selected on the Daily Menu

Meat/Alternate	Cottage Cheese	0	•
Bread/Alternate	Bagel - Whole Grain	0	,
Fruit	Peaches	0	,
Milk	1% / Skim Milk	0	•
Milk	Whole Milk	0	,
Milk	Substitute Milk	0	

• Click each **box** and enter the quantity served.

*Note*: The Non-Infant pop-up shows three milk types: Whole Milk, 1%/Skim Milk, and Substitute Milk. This allows you to enter quantities served by milk type so they are properly calculated and reflected on the Menu Production Record and the Milk Audit.

- Click the corresponding *drop-down* menu and select the unit of measurement.
- Click Save.



**Record Actual Quantities** 



## Enter Actual Quantities Served

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Watch the video linked above to learn more about entering Actual Quantities. OSDE requires that the actual amount prepared is entered for each meal component, each day.

This same video can be used to help train your center staff as well.

Please note that the actual amount served/prepared should be equal to, or more than the amount required.

## **Menu Examples**

When selecting your food components, it's important to use the primary components that make your meal creditable. For any "extra" items, you can use the Menu Template Name or the Menu Notes section. Below are some examples of menu names and components to help guide you.

> *Note*: OSDE requires that Menu Notes be entered prior to saving. Menu notes should be used to elaborate on specific brands used, if a secondary option was provided, extra items served, CN label numbers, etc.

If you truly have no notes, you can enter N/A.



## **Breakfast: Cereal & Fruit**

Breakfast	Meal Time: 07:30 AM - 08:00 AM				▲ 😁 🗸
Menus				1	😫 Delete 🛛 🗢 Save
		Actual Quantity Served		Attendance Summary	
Meat/Alternate	•	0	Ase	Estimated	Actual
Bread/Alternate	General Mills - Wheat Chex	0	1 yr	0	D
	Is this whole grain-rich? Yes (III)		2 yr	0	0
	Calculate Oz Eq for 1 Serving		3-5 yr	0	0
Vegetables		0	6-12 yr	0	0
repetables.		v	13-18 yr	0	0
Fruit	Peaches, canned - #10, drained *	0	Adult	0	0
Milk	MILK - 1% over 2 / Whole under 2 / Substitute as required *	0	Total	0	0
Meal Pattern Rec	uirements		Menu Notes		
			Peaches served Almond Milk ser	t but had apples as rved for substitute	a backup

#### **CN Label Item**

Lunch Meal T	ime: 12:00 PM - 01:00 PM				
Menus					8
		Actual Qu	antity Served		Attendance Summary
Meat/Alternate	CN Label Meat/Meat Alt (CN # in notes)		0	Age	Estimated
Bread/Alternate	CN Label Bread (insert CN # in notes)	•	0	1 yr	0
	Is this whole main, rich?		-	2 yr	٥
	Calculate Oz Eq for 1 Serving			3-5 yr	0
Vedetables	CN Label Vegetable (CN # in potes)		0	6-12 yr	0
vegetables	Civitabel Vegetable (Civi# Inflotes)		~	13-18 yr	0
Fruit/Vegetable	Cantaloupe, fresh		0	Adult	0
Milk	MILK - 1% over 2 / Whole under 2 / Substitute as	required *	0	Total	a



#### ou opéopo

CN 003000 - Pizza with cheese served with optional side salad and ranch

## **Generic Options**

Lunch	Meal Time: 12:00 PM - 01:00 PM				▲ 🖉 🤞
Menus				1	🖹 Delete 🛛 💿 Save
		Actual Quantity Served		Attendance Summary	
Meat/Alternate	Chicken Breasts *	0	Asc	Estimated	Actual
Bread/Alternate	Bread, generic (bread type in notes)	0	1 yr	0	0
	Is this whole grain-rich? Yes (III)		2 yr	0	0
	Calculate Oz Eq for 1 Serving		3-5 уг	0	0
Vegetables	Cauliflower, frozen	0	6-12 yr	0	0
			13-18 уг	0	0
Fruit/Vegetable	Green Beans, canned - c *	0	Adult	0	0
Milk	MILK - 1% over 2 / Whole under 2 / Substitute as required *	0	Total	٥	0
Meal Pattern R			Menu Notes		
			Grilled chicken wheat buns	breast served on ha	omemade

## Snack Example

PM Snack Meal Tim	e: 04:15 PM - 04:45 PM				▲營 ^
Menus					🖹 Delete 🥥 Save
		Actual Quantity Served		Attendance Summary	
Meat/Alternate	Cheese Cubes	• •	Asc	Estimated	Actual
Bread/Alternate	Saltines		1 yr	0	0
		•	2 yr	0	0
	Calculate Oz Eq for 1 Serving		3-5 уг	o	0
Vegetables			6-12 yr	0	0
- Bennes			13-18 уг	a	D
Fruit	Apple Juice	• •	Adult	0	0
Milk		· O	Total	0	0
Maal Datters Requirements			Menu Notes		
Meal Pattern Requirements			100% apple juic	e. cheddar cubes	
				.,	

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## Lunch Example

.

. .

. .



### Infant Menu Example

Breakfast I	Meal Time: 07:30 AM - 08:00 AM					<b>▲</b> **	
Menus					8	) Delete 🥏 Sav	Æ
		Act	ual Quantity Served	/	ttendance Summary		
0-5 months				Age	Estimated	Actual	
Infant Milk	Breast Milk / Iron Fort. Infant Formula		0	0-5 months	0	0	
6-11 months				6-11 months	0	0	
Infant Milk	Breast Milk / Iron Fort. Infant Formula	•	0	Total	0	0	
Infant Cereal	Infant Oatmeal Cereal	×	0	Menu Notes	noal		
Meat/Alternate	Chicken, pureed	*	0	Quaker iniant out	neur		
Vegetables	Pea Carrot Spinach, pureed	•	0				
Fruit	Apple Strawberry Banana, pureed	٠	0				

Save 🤇

Here is a list of the generic foods you will find in the food list. Use these if the items you are serving are not found in the food list, OR if you are serving any Combination or CN label foods. Enter the exact food item served in the menu notes.

Generic Food Items	
Cereal, generic or Cereal, generic (puffed)	CN Label Bread
Breading, generic or Bread, generic	CN Label Vegetables
Buns/Rolls, generic	CN Label Meat/Meat Alt
Wheat Bread, generic or White Bread, generic	Fruit, pureed
Crackers, generic	Vegetables, pureed
Pasta, generic	



# Menu Reporting

## Center Sponsors: Print the Menu Production Record

The Menu Production Record lists the amount of food centers need to serve and purchase to adequately serve children in their care. It may also include actual quantities served and leftover quantities, if recorded (subject to policy M.01 and policy M.01f). Before printing this report, centers/sponsors should record center menus and estimate attendance (at least). Estimating attendance allows centers to plan ahead of time so they can purchase the appropriate quantities of food (as listed on the report). If you print this report after recording actual attendance and/or actual quantities served, the quantities needed based on actual attendance display on this report, as do the actual quantities prepared.



Sponsors can use this report when auditing centers to ensure that the correct amounts of food are being prepared and served.

- From the menu to the left, click Reports.
- Click the Select a Category drop-down menu and select Menus.
- Click the Select a Report drop-down menu and select *Menu Production Record.*
- Click the Select Center drop-down menu and select the center for which to print the report. You can also select All Active Centers to print this report for all centers.
- Click the next drop-down menu and choose from the following: Both, Non-Infant, or Infant.
- Click the *From* box and select the report start date.
- Click the **To** box and select the report end date.
- Click *Run*. The report downloads as a PDF.

Jess Center Site	#: 123			No	n Infant	Menu Pi	roducti	on Record					MM Test
(817) 123-4567			Wednesday 02/27/2019 CE ID :				2145550330						
Breakfast		1 Yr	21	rs	3-5 Yrs	6-12	Yrs	13-18 Yrs	Adults	5	Total		Total Including Infants
Distance	Estimated Attendance	0		0	0	1		0		0	1	Planned Participation	1
	Actual Attendance											Non-Program Meals	
			Rg	d Servin	ig Size B	v Age		Qty Need	led Per	Q	ty Needed Pe	r Actual	
Component	Food Served/Planned	1	2	3-5	6-12	13-18	Adul	t Est Atter	ndance .	Ac	tual Attendan	ce Qty Prepared	Special Notes
Brd/Alt	Waffles	1/2 sei	1/2 ser	1/2 ser	1 serv	1 serv	2 serv	1 serv					
Veg							1						
Fruit	Applesauce	1/4 c	1/4 c	1/2 c	1/2 c	1/2 c	1/2 c	1/2 c					
Meat/Alt	Egg	1/2 itm	1/2 itm	1/2 itm	1 itm	1 itm	2 itm	1 itm					
Milk	Whole Milk	1/2 c					1						
Milk	1%/Skim Milk		1/2 c	3/4 c	1 C	1 C	1 C	1 C					
Milk	Milk Substitute	1/2 c	1/2 c	3/4 c	1 C	1 C	1 C						
	· · · · · · · · · · · · · · · · · · ·	4.24-	2	/m	2.5.Vrc	6 12	Vre	12.19 Vro	Adulte		Total		Total Including Infante
A.M. Snack	Cationated Attacksor	1 Yr	21	15	3-0 115	0-12	TIS	13-18 MS	Adults	<u> </u>	Total		
	Estimated Attendance	U	-	0	0	10		U	<u> </u>	-	15	Planned Participation	23
	Actual Attenuance					<u> </u>		01-11-1		_		Non-Program Meals	
Component	Food Served/Planned	1	2 Rq	d Servin 3-5	ig Size B 6-12	y Age 13-18	Adul	t Est Atter	ied Per idance	Ac	ty Needed Pe tual Attendan	ce Qty Prepared	Special Notes
Brd/Alt	Melba Toast	1/2 sei	1/2 sen	1/2 ser	1 serv	1 serv	1 serv	1					
Veg							1						
Fruit							1						
Meat/Alt	Cottage Cheese	1/2 oz	1/2 oz	1/2 oz	1 oz	1 oz	1 oz						
Milk	Whole Milk						1						
Milk	1%/Skim Milk						1						
(Choose 2 of 5)							1						
Milk	Milk Substitute												
1	· 1	4. 1/2	2	/m	2.5.Vm	6.12	Vre	12.10 Vro	Adulte		Total	•	Total Including Infants
Lunch	Estimated Attendance			0	5	10		0	Addite	0	15	Planned Participation	25
	Actual Attendance		-	-	· · ·		-				15	Nee Breaster Meals	20
	Actual Attendance			d Convin	a Cize D			Ob/ Need	ad Dar	0	ty Needed De	r Actual	
Component	Food Served/Planned	1	2	3-5	6-12	13-18	Adul	t Est Atter	ndance	Ac	tual Attendan	ce Qty Prepared	Special Notes
Brd/Alt	Wild Rice(WG)	.40 oz	.40 oz	.40 oz	.70 oz	.70 oz	1.40 o	z 9 oz					
Veg	Broccoli	1/8 c	1/8 c	1/4 c	1/2 c	1/2 c	1/2 c	6 1/4 c					
Fruit	Fruit Cocktail	1/8 c	1/8 c	1/4 c	1/4 c	1/4 c	1/2 c	3 3/4 c					
Meat/Alt	Baked Salmon	1 oz	1 oz	1 1/2 0	2 oz	2 oz	2 oz	1.72 lb					
Milk	Whole Milk	1/2 c											
Milk	1%/Skim Milk		1/2 c	3/4 c	1 c	1 C	1 C	13 3/4 c					
Milk	Milk Substitute	1/2 c	1/2 c	3/4 c	1 c	1 C	1 c						
				· · · ·	1.1		•			_			

02/27/2019 10:28 am CST All CACFP forms and documents must be kept for three (3) years after the end of the program year.

Alternate Form No. 1530A

Note: Sponsors should ansure that they have selected the correct Food Quantity Type in the Food Quantities affects the units of releasure used on the Menu Production record when calculating quantities. If you are recording individual infant menus, the Menu Production Record for Infants only schools quantities for the debutk infant menus fractice that canters have other recorded or estimated. Page 1 of 4

## Printing the Center Monthly Menu Report

We recommend you periodically review your sites' planned menus to ensure that they meet meal pattern requirements each day.

- From the menu to the left, click Reports.
- Click the Select a Category drop-down menu and select Menus.
- Click the Select a Report drop-down menu and select Center Monthly Menu plan.
- Click the *Date* box and select the month for which to run this report.
- Click the Select Center drop-down menu and select the center for which to run this report. You can select All Active Centers to print this report for all active centers, or you can click Select Multiple Centers and set filters for the centers to include.
- Click *Run.* The report downloads as a PDF.

## Reviewing the Center Monthly Menu Report When reviewing center menus, make sure that:

- Juice is only planned for once per day.
- There is a vegetable planned at each lunch and dinner.
- A whole grain-rich food is planned for at least once per day. There are no grain-based desserts present.



# Adjusting Grain Ounce Equivalents

•When recording menus, click Calculate Oz Eq for 1 Serving under the Bread/Alt food item. The Ounce Equivalent Calculator pop-up opens. The Bread/Alt you selected displays in the drop down.

*Note*: KidKare is pre-programmed with the most used grain ounce equivalent serving sizes. Use this to verify and update the serving information if your bread component is different than what is programmed into KidKare.

Click the **Serving Size** box and update the common serving size, if needed. Following our example above, we'll leave this set to 1 Slice.

Click the **Serving Weight** box and update the serving weight as stated on the nutritional label for your food. In our example, we need to change this to 45. Use the corresponding *drop-down menu* to select the weight unit. This will typically be grams (g), but some labels may give the serving weight in ounces. If this is the case, select ounce (oz). Once you set the new weight, the 1 Serving = box updates and displays the total ounce equivalents in one serving of your food item. Continuing our Brand B example, you'll see that Brand B contains 1.5 oz eq in one serving vs the 1 oz eq saved to the food list for Brand A.

Click Save.

Once you save this override, it will apply to all quantities reported for this Bread/Alt on the menu.

If you copy this menu for future use or save this menu as a template, this override is retained so you do not have to enter it again.

Please note that this only applies to menus saved on the *Daily Menu* page—templates created on the *Menu Templates* page will use the food list calculation until you override it after applying it to *Daily Menu*.

#### Ounce Equivalent Calculator 🛛 🗙

Bread (011)		۲
Serving Size	1	Slices (slic)
Serving Weight	45	grams (g) 🔹
		1 Serving = 1.50 oz eq
		Cancel Save



## Manage Menu Footers

You can add footers to infant and non-infant menus from the Manage Menu Footers CDT dialog box. The text you enter here prints on the following reports:

- Center Monthly Menu Plan
- Center Weekly Menu Plan
- Center Weekly Menu Non-Infants Only
- Center Weekly Menu Infants Only
- Master Menu Monthly Plan Non-Infants Only
- Master Menu Monthly Plan Infants Only

Note that the footer will also print on the center version of these reports. To add menu footers:

•From the menu to the left, click Administration.

- Select Manage Menu Footers.
- Click the *Noninfant Menu Footer* box and enter the text to display on non-infant menus.
- Click the *Infant Menu Footer* and enter the text to display on infant menus.
- When finished, click.

Manage Formula Types

Use the Manage Formula Types window to create formula options you can select when creating child records and recording infant menus.

- From the menu to the left, click Administration.
- Select Manage Formula Types. The Manage Formula Types page opens.
- . To add a formula type:
  - -Click *Add Formula Type*. The Add Formula Type pop-up opens.
  - -Click the *Formula Type* box and enter the formula name.
  - \_ Click Save.
- To edit a formula type:
  - -Click the type to edit. The Edit formula Type pop-up opens.
  - -Update the name, as needed.
  - Click Save.



- To delete a formula type:
  - -Click the type to remove. The Edit Formula Type pop-up opens.

*Note*: Ensure that you have selected the correct formula type to remove. There is no confirmation message, and the formula type is removed immediately.

- Click Delete.
# Center Attendance & Served Meals

You can record Daily Attendance and Meal Counts for any selected center, if needed. Note that at Step 4 these are the same steps a center would follow to record attendance and meal counts themselves.

- From the menu to the left, click Menus/Attendance.
- Click Center Daily Attendance/Served Meals.
- Select the center you are entering data for in the top right drop down.
- Make sure the correct date, classroom, and meal are selected at the top.
- •Check the **box** next to each participant's name to mark attendance.



• Click **1** to record a meal count. A participant must be marked in attendance before you can access this option.



If you have sites that are open enrolled and use the meal counter option, click HERE to watch a video on how your sites will use the KidKare Meal Counter feature to track <u>meals.</u>

# Recording Meals for Infants

You can record individual infant menus on the Attendance & Meal Count page. If you have already recorded an infant menu on the Daily Menu page, this menu is used as the default for all infants, and you can make adjustments here.

- From the menu to the left, click Menus/Attendance.
- Click Center Daily Attendance/Served Meals.
- Select the center you are entering data for in the top right drop down.
- Make sure the correct date, classroom, and meal are selected at the top of the page.
- Click The infant must be marked in attendance before you can access this option. The Infant Menu pop-up opens.

Foods are based on the o developmental readiness component was not serv	default menus for the s of each infant, plea red, set the slider to f	e infant's age group. Since foods served may va se select the foods that were actually served to No.	ry based on the the infant. If the meal	
Meal Component	Served	Food Served	Quantity Served	(
Infant Milk	Yes 🕕	Breast Milk / Iron Fort. Infant Formula (11)	0	
Infant Cereal	Yes 🕕	Iron Fortified Infant Cereal (542)	0	
Meat/Alternate	(II) No			
Vegetables	UI No			
Fruit	Yes (III)	Applesauce (002)	0	

- If the infant is served something outside of the default menu (if one exists), follow the steps below. If the infant is served the default menu, go to the next step.
  - -Click (III) next to each food component to enable or disable for this infant.
  - -Click the *Food Served* drop-down menu to select the food this infant is eating.
- If you are required to record quantities served, use the *Quantity Served* boxes to enter the amount served to this infant.

**Note:** If the infant is being served the default menu and the unit of measure used for recording quantities has already been set, you cannot change the unit used. For example, if the default menu has quantities recorded in tablespoons, you cannot switch the quantity to ounces. This ensures that KidKare can accurately calculate the quantities served for the default menu. The figure below shows the locked quantity for an infant in the 0-5 months age group.

Infant Menu - Dumas, Alexander

- Click Continue.
- Repeat Steps 4-7 for each infant present at the meal.
- When finished, click Save.

 Foods are based on the default menus for the infant's age group. Since foods served may vary based on the developmental readiness of each infant, please select the foods that were actually served to the infant. If the meal component was not served, set the slider to No.

 Meal Component
 Served
 Food Served
 Quantity Served

 Infant Milk
 Image: Served infant, please select the foods that were actually served to the infant. If the meal component was not served, set the slider to No.



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# Individual Infant Feeding w/ Actual Quantities & Infant Feeding Report



Cancel

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### Print Individual Infant Menus

If you have enabled individual infant menu reporting, you can print individual infant menus. The Infant Feeding Report lists menus for each infant served and includes the following for each meal:

- Meal Components
- Food Served by Component
- Quantity Required by Component
- Quantity Served by Component

This report also includes information such as, the center's name and site number, whether the parent accepts center formula and/or food, the infant's age in months, the infant's date of birth, and more. Each infant is listed on a separate page. This report is sorted by child name, and you can print it for all active centers or for your selected center.

#### To print this report:

- From the menu to the left, click Reports.
- Click the Select a Category drop-down menu and select Menus.
- Click the Select a Report drop-down menu and select Infant Feeding Report.
- Click the Select Center drop-down menu and select the center for which to print the report. You can also select All Active Centers to print the report for All Active Centers.
- Click the *From and To boxes* to set the date range for which to print this report.
- Click *Run.* The report downloads as a PDF.



# Manage School Calendar

The School Calendar page allows you to add school out days for your sites. This is useful for setting up summer vacation, holidays, or extended school closures. Adding school out dates to the calendar removes the requirement that sites select School Out when checking children in for the day.

You can add school out days per child, center, school, or school district. You can also add school out days for all children and all centers at once.

- From the menu to the left, click *Menus/Attendance.*
- Select School Calendar. The School Calendar page opens.
- Choose from the following options:
  - All Children, All Centers: Create a school out event for all sites and chidlren.
  - Center: Create a school out event for a single site. If you select this option, you must select a center at the top of the window.

- Child: Create a school out event for a specific child. If you select this option, you must select a center (top of the window) and a child (to the right of the calendar options).
- School District: Create a school out event for an entire school district. If you select this option, you must select a center (top of the window), a state (if you operate in multiple states), and a school district (to the right of the calendar options).

- School: Create a school out event for a single school. If you select this option, you must select a center (top of the window) and a school (to the right of the calendar options).
- To add School Out days:

-From the *Draggable Events* section, click and drag School Out to the calendar, and drop it on the first date of the event. If you are adding a single day, the process is complete.

If you need to add a date range, double-click the school out event you placed on the calendar. The Event Editor pop-up opens.

#### -Select Multi-Day.

 Use the Event Start Date and Event End Date boxes to update the date range. The Event Start Date defaults to the date on which you placed the event originally.

vent Start Date:	06/01/2023	<u> </u>	
vent End Date:	09/01/2023	Ê	

- Click **OK**. The event is added to the dates you specified.



- To remove **School Out** days:
  - Double-click the event on the calendar. The Event Editor opens.
     Click *Delete.*
  - -At the Are You Sure prompt, click Delete.



# Reports

- Children
- Attendance
- Centers
- Claims
- Menus
- Receipts

You can find all of these reports by clicking on Reports from the menu to the left and selecting the appropriate category.

# **Children Reports**

- Child Roster: This report lists all children for a selected center or for all centers. It includes F/R/P counts and percentages, F/R/P basis, as well as basic demographic information and enrollment dates for the listed children.
- Child Roster [Center Version]: This report lists children for a selected center or for all centers. However, it does not include information beyond basic demographics and enrollment dates.
- Child List Export: This is a CSV list of all children. Use this report when looking for a report on allergies or special needs.
- *IEF List:* This report summarizes income eligibility form information saved to child records for a selected claim month. It includes household information if such information was saved to the child profile. Each center included prints on a new page.

- Child IEF/Enrollment Report: This report prints enrollment and/or income eligibility forms for selected children. You must select a center before you print this report.
- Verify FRP Consistent Within Family: This report lists the FRP status of related children enrolled in the selected center.
- Child Racial Count Summary Per Center: This report provides a count of children broken down by race and ethnicity for a specific center.
- **Children Claimed Without Absence:** This report lists children claimed for the selected claim month without any absences.
- Children Not Claimed: This report lists active children who were not claimed for a selected claim month. Note that this report does not take attendance into consideration—it only checks whether an active child was claimed for that month.

# **Attendance Reports**

- Weekly Attendance + Meal Count Report: This report lists weekly attendance and meal counts for multiple center or a specific center
- Monthly Claimed Attendance Only Report: This report includes claimed attendance for the selected claim month.
- Monthly Paid Attendance Only: This report lists paid attendance for a selected claim month. It also includes classroom totals.
- Monthly Paid Meal Counts by Age Group: This report lists paid meal counts for a selected claim month by age group. It also includes totals for each age group.
- Monthly Paid Meal Counts by Child: This report lists paid meal counts for a selected claim month by child. It includes totals for Free/Reduced/Paid meals, as well as At Risk Totals.

- Monthly Paid Meal Count Summary: This report lists all paid meals for a selected claim month. It is broken down by meal type.
- Weekly Paid Attendance + Meal Counts: This report lists weekly attendance, broken down by attendance and meal.
- Actual vs Estimate Meal Count Summary: This report compares actual meal counts with the estimated meal counts, broken down by meal.
- **Daily FRP Report:** This report provides a Free, Reduced, and Paid breakdown of all meals claimed each day in the selected claim month.



# **Center Reports**

- Center Info Report: This PDF report lists centers and center details.
- Center Enrollment Statistics: This is a CSV list of centers that includes enrollment statistics broken down by Free/Reduced/Paid. It also includes numbers for missing enrollments, as well as total enrollment.
- **Centers Disallowance Export:** This is a CSV list of centers with disallowances for the selected claim month. It lists the center name, disallow reason, and the total number of disallowances for that center.

- **Centers Error Summary Export:** This report provides a summary of errors for your centers for a specific claim month.
- Centers Summary Export: This is a CSV list of centers that includes any assigned monitors, number of pending children, expiring enrollments and enrollment forms, and so on.



# **Claims Reports**

- Claims List Export: This is a CSV list of claims and claim details.
- Office Error Report: This report provides a quick claim overview and lists specific errors that occurred when processing the claim. This report also prints after you process claims. For detailed information about the errors that may appear on this report, see Error Codes.
- Claims Roster: This report lists children, enrollment information, FRP status, basis, and so on.

- **Center Error Letter:** This report provides a quick claim overview and lists certain errors that occurred when processing claims for a specific center.
- Monthly Milk Audit Summary: This report summarizes milk totals entered via the Milk Audit feature. You can print this report as a PDF, or you can export it to a spreadsheet file.



# **Menus Reports**

- Center Monthly Menu Plan: This report prints your centers' menu plans for the selected claim month.
- Center Weekly Menu/Non-Infants Only/Infants Only: This report prints a single center's weekly menu plan. You can print this for a single week or the entire month.
- Master Monthly Menu Plan/Non-Infants Only/Infants Only: This report prints master menus for the selected claim month.

- Menu Production Record: This report lists the amount of food centers need to serve and purchase to adequately serve children in their care.
- Menu Notes Report: This report prints any notes centers entered when recording menus. It is divided into non-infant notes and infant notes.

# **Receipt Reports**

- Non-Profit Status Report: Use this report to ensure that centers are running a non-profit food service.
- Center Receipts Journal Report: View a list of all receipts. This report includes vendor, description, and expenses broken down by category.
- *Monthly Receipt Totals:* View a list of centers that submitted receipts, the total number of receipts submitted by each center, and the total of each expense category.
- Receipt List Export: Export receipt data to a
- spreadsheet file (XLSX). Use filters to select the exact data you need to export.





- Manage Vendors
- Manage & Verify Receipts
- Quick Entry
- Itemized entry

# Manage Vendors

### Add & Manage Vendors

Vendors are typically stores from which sites purchase food. You can also add center staff as vendors to track their labor as receipts. You must add vendors before you can enter receipts for your sites.

- From the menu to the left, click Tools.
- Select Manage Vendors.
  - To add a vendor:
  - Click Add Vendor. The Add Vendor pop-up opens.
  - -Click the *Name* box and enter the vendor's name.
  - -Enter the remaining vendor information, as needed. Only the *Name* box is required.

Add Vendor			×
Name*	Kroger		
Street Address	123 S University		
Clty	Denton		
State	TX		•
Zip Code	76201		
Phone Number	(940) 567-8910		
Center	All Centers		•
		Cancel	Save

- -Click the *Center* drop-down menu and select the center to which to apply this vendor. All Centers is selected by default.
- Click Save.



- To delete a formula type:
  - -Click the type to remove. The Edit Formula Type pop-up opens.

*Note*: Each vendor you add must be unique. KidKare will notify you if a vendor already exists. Update the vendor's name to proceed.

- To edit a vendor:
  - Click the vendor to edit. The Edit Vendor pop-up opens.
  - -Make changes to the information here, as needed.
  - -When finished, click Save.
- To delete a vendor:
  - Click the vendor to delete. The Edit Vendor pop-up opens.
  - \_ Click **Delete.** The vendor is set to Inactive.
- To re-activate a vendor, click *Reactivate* column.

## **Merge Vendors**

Vendors must be unique. You can merge duplicate vendors to single vendor records for ease of management.

•From the menu to the left, click Tools.

- Select Merge Vendors. The Merge Vendors page opens.
- In the Source Vendor section, select the vendor to merge.
  - In the Destination Vendor section, select the
- merge destination.
- Click Merge.



## Manage Vendors for Sponsors

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# Manage & Verify Receipts

## Add Itemized Receipts

You will use Itemized Entry to add expenses that you currently have to enter into the OSDE Food Purchasing Form. Any receipts that are not already categorized, along with food program labor, should be entered here. When you use itemized entry to add expenses, you enter each item on the receipt in detail. Itemized entries include the item category, amount, quantity, total cost, and an optional description.

- From the menu to the left, click Administration.
- Select Manage Verify Receipts.
- Click the Select Center drop-down menu at the top of the window and select the center you are entering receipts for.
- Click Add Receipt. The Add Receipts page opens.
- Click the Itemized Entry tab.

Quick Entry Itemized Entry					Sine Sive/Add Another	× Cano
Expense Detail						
12/19/2024	8	Add or Select Vendor	,	Invoice #		
Payment Method .	•	Description		Receipt Total \$0		
Receipt Items						
Select Category •		x \$0	= \$ 0.00	Description		0
# Receipt Items		Running Total		Difference	Total Milk	
1,0000		10.00		10.00	a page culture	





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- Complete the Expense Detail section.
  - The Date, Vendor, Payment Method and Receipt Total boxes are required.
  - We recommend you also enter a Description for reporting purposes.
- Complete the Receipt Details section.
  - Click the Select a Category drop-down menu and select the expense category. All expense categories except Unapproved count towards reimbursement for the food program.
  - Enter the item quantity. You can enter up to four (4) decimal places. This box defaults to 1.
    - If you selected a Milk category, you can use the Gallons Converter.
      - Click or type + (plus sign) in the quantity box.

Use this calculator to o	onvert milk purchases to gallons.	
Unit	Quantity	
Pints	0	
Quarts	0	
Half Gallons	0	
Ounces	0	
Total Gallons	0.0000	

12/19/2024	-	Cotsco					•	Invoice #	
ebit	۲	Description	000	l order				Receipt Total \$ 200	
eceipt Items									
%/Skim Milk	10	I	×	\$ 1.99	=	<b>\$</b> 19.90		milk	4
bod	20		x	\$ 2	=	\$ 40.00		applesauce	6
upplies	20		×	<b>\$</b> 5	-	\$ 100.00		plates	4
upplies	7		x	\$ 5	=	\$ 35.00		kitchen supplies	•
ax •	1		x	\$ 5.10	=	\$ 5.10		tax on non food items	¢

- Enter the number of pints, quarts, halfgallons, and/or ounces of milk you purchased.
- Click Save.
- Click the \$ box and enter the item's unit price. The system automatically multiplies the unit price by the quantity and provides a total. You cannot change the calculated total.
- Click the Description box and enter a description for this line item. You can enter up to 255 characters. This box is optional.
- Click G to add another line.
- Click Save in the top-right corner. You can also click Save/Add Another to save your entry and begin adding another one.

## Add Receipts: Quick Entry

You will use Quick Entry to add expenses that you currently do <u>NOT</u> have to enter into the Food Purchasing Form. The category fields calculate the total for the category by taking the sum of all numbers entered for the category. The running total is then compared to the receipt total.

- From the menu to the left, click Administration.
- Select Manage Verify Receipts.
- Click the Select Center drop-down menu at the top of the window and select the center with which to work.
- Click Add Receipt. The Add Receipts page opens.
- Click the Quick Entry tab.
- Complete the Expense Detail section.
  - The *Date, Vendor, and Receipt Total* boxes are required.
  - We recommend you also enter a *Description* for reporting purposes.

*Note*: You cannot save your entry if the receipt and running total do not match. The receipt and running total must also both be greater than zero. You must also complete all required fields before saving.

- Enter your milk quantities in gallons. You can also use the Gallons Converter:
  - Click the *Gal* link next to the milk type, or type
     + (plus sign) in the milk quantity box.
  - Enter the number of pints, quarts, half-gallons, and/or ounces of milk you purchased.
  - Click Save.
- Enter your expenses in the *Expenses Items* section.
  - Click the box next to the category to record, and enter the dollar amount. All expense categories except Unapproved count towards reimbursement for the food program.
  - Press *Tab* to enter multiple, separate dollar amounts in each category.
  - Click X next to a dollar amount to remove it.
  - Type / (forward slash) in a box to populate it with the remaining difference.
- Click Save in the top-right corner. You can also click Save/Add Another to save your entry and begin adding another one.

# **Verify Receipts**

Verifying receipts allows you to track which sites have sent you receipts and confirm the data is correct. Even though this step is optional, we recommend you complete it if you allow sites to enter their own receipts.

- From the menu to the left, click Administration.
- Click Manage Verify Receipts. The Manage Verify Receipts page opens.
- Use the drop-down menu and select a date range to view. You can choose from the following:
  - Last 90 Days
  - Last 60 Days
  - Last 30 Days
  - Current Month
  - Previous Month
  - Custom Date
- Click the link in the *Date* column to view the receipt details. The Edit Expense pop-up opens.
- Make any changes, as needed. When finished, click *Save*.
- Click Verify.

*Note*: You can click Verify All from the Manage Verify Receipts page to verify all receipts listed for the selected center for the selected date range. Also, to remove receipts you cannot verify, access the Edit Expense pop-up and click Delete. Deleting receipts is permanent.



# Enter Food Program Labor

To enter Food Program labor and Admin labor, you will use the Itemized Entry method. Watch the video below for examples on how to enter labor.



### **Enter Food Program Labor**

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# **Milk Audit**

# **Review Milk Audit**

### **Milk Audit for Center Sponsors**

- From the menu to the left, click *Claims* and select *Milk Audit.*
- Click the *Select Center* drop-down menu at the top of the page and select the center for which to view the Milk Audit. The Milk Audit displays.
- Click the *Month* box and select the claim month to view.
- Select Calculated + Actuals to view milk audit information based on calculated and actual served quantities.

*Note*: This option may not display according to your settings. If this is the case, the numbers you are viewing are the Calculated numbers.

The following information displays in the table for the selected month:

**Previous Month Carry Over/Starting Balance:** This may be the ending balance from the previous month (depending on your specific policy settings). To edit starting balances, click  $\checkmark$ , enter the new amount, and click  $\heartsuit$ .

**Note:** This option may not be available according to the preferences your state has set. Centers do not have the ability to edit their carryover amounts, only sponsors.

- -Purchased: This is the amount of milk purchased, based on receipt date.
- -*Required*: This is the amount of milk required based on menus and meal counts.
- -Written Off: This is the amount of milk written off for the month. For example, this number accounts for cases in which the milk was spilled, spoiled, and so on.
- -End of Month Balance: This is the amount of milk leftover at the end of the month.
- -Actual Served: This is the actual total of milk served during the selected month based on meal records. This row only displays if you select Calculated + Actual in Step 4.
- Actual End of Month Balance: This is the actual end of month balance based on the following formula: Carry Over + Purchased -Written Off Actual Served. This row only displays if you select Calculated + Actual in Step 7.
- Click *Print* and choose a report to print. You can choose *Summary Report* or *Detailed Report*. Both reports download as PDFs.

#### Using the Daily Calendar Use the Daily Calendar to view and/or add milk events, such as purchases or write offs.

• Click **Show Daily Calendar.** The Daily Calendar displays at the bottom of the window. The Calculated version is shown in the figure below.



- Click the drop-down menu and select the milk type. You can choose from Whole, 1%/Skim, or Substitute.
- To add a write off:
  - In the *Draggable Events* section, click the *Write Off* event and drag it to the calendar.
  - Drop it on the day on which to apply it. The Milk Write Off pop-up opens.



05/30/2019	m	Gallons
------------	---	---------

*Note*: A day can only have one write off event at a time. You cannot change the date in the Milk Write Off pop-up. If you are a sponsored center, your food program sponsor must enable this feature.

- Click the text box and enter the amount of milk you are writing off.
- Click the corresponding drop-down menu and select *Gallons, Pints, or Quarts.* All units of measure are conve!rted to gallons once you save.
- Click Save.
- To add a purchase:
  - In the *Draggable Events* section, click the *Purchase* event and drag it to the calendar.

*Note*: You must have the *Vendor/Receipts* permission enabled on your account to access and work with Purchase events. If you are a sponsored center, your food program sponsor must enable this feature.  Drop it on the day on which to apply it. The Add Expenses pop-up opens.

Quick trery Inte	moed Entry		
Expense Detail			
		Add or Select Vendor	
Indice #			
Description			
Mik Quantities	gat e	Tandam Mita 0 gale	unix 0
Mik Quantities	gar•	national e per la compa	una jo Titul
Mik Quantities www.www.www.op	pr-		ona o Tase Coffeence S
Recept Iosal So Milk Quantities Whom Milk Q Expenses Items Grappoved	(pr)	incluin (d) () ((d) (d) (d) (d) (d) (d) (d) (d)	Una 0 Tatal Coffeence 5 59.1
An except Total Sol Milk Quantities Whole Milk Expenses Berns Unapproved Food	рн <b>П</b>	novalin data (a) (pro-	0 Tick Ofference () 59.0 59.0
An except Total Sol Milk Quantities whole Milk Caperuses Berns Chappened Pood Supplet	gal*		0 Tital Ofference 5 59.5 59.5 59.5
An except lists ( ) o MIR Quantities whole one of Caperises heres Unapproved Rood Supples Labor	ри• 0 0		0 1000 00000000 50.0 50.0 50.0 50.0

- Select Quick Entry or Itemized Entry.
- ° Enter your milk quantities.
- Click Save.
- To edit an event:
  - ° Click the event to edit. A pop-up opens.
  - Enter new information over the existing information. Note that you cannot change the event date.
  - Click Save.
- To remove an event:
  - Click the X in the right corner of the event banner.
  - Respond to the confirmation prompt.

### Additional Calendar Items

The following items also display on the calendar:

- •*Required*: Required amounts display for each day where an calculated or calculated + actual calculation is present. You cannot add, move, or remove these markers.
- A Milk Shortage (Calculated): This icon displays on each day for which the daily ending balance value is calculated to be negative. Click this icon to view the anticipated shortage amount.

Milk Shortage (Calculated)

A milk shortage is calculated to occur on January 09, 2019 in the amount of 3.6563 gallons.

- A Milk Shortage (Actual): This icon displays on each day for which the daily ending balance based on the calculated values is negative. Click this icon to view the actual shortage amount.
- Shortage Analysis: This section displays the calculated total amount of gallons you are short by day or by claim. This is determined by how your system is set up. For sponsored centers, your food program sponsor makes this distinction. If you selected Calculated + Actual at the top of the page, the actual shortages display as well.

#### Shortage Analysis

Gallons Short for Claim	57.3904
% Short	100.0000%

#### Shortage Analysis

Talculated	
Gallons Short by Day	72.640
% Short	100.0000
kctual	
Gallons Short by Day	0.000
% Short	0.0000



×

### Milk Audit for Sponsors



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# Claims

Prepare to Process Claims
Track Received Claims
Process & Reprocess Claims
Submit Claims to State
Review & Manage Claims

# **Prepare to Process Claims**

## Change the Claim Month

KidKare tracks claim month-specific information independent of your computer's date. This should be the month immediately before the calendar month (in most cases) and is the claim month on which you are working.

Only one person needs to advance the claim month for each account. Once the month has been changed in the account, other users must log out and log back in to the software before they see the change.

To change your current claim month:

- •From the menu to the left, click *Claims*.
- •Select *Advance Claim Month*. The Advance Claim Month page opens.



 Click I to advance the claim month, and click I to move the claim month back. • Check the Automatically Withdraw Expired Enrollments option to mark all children with expired enrollments as withdrawn as of their enrollment expiration date

Note: Enrollment expiration dates ensure that children who aren't re-enrolled are not reimbursed more than one year after their date of enrollment (subject to policy D.1). However, children remain active even once their enrollment expires, unless you withdraw them in the Manage Child information window. Checking the Automatically Withdraw Expired Enrollments box when changing the claim month automatically marks children with expired enrollment as withdrawn.

Click Save.



### Activate Pending Children

When centers enroll children, the children are automatically set to Pending status. Sponsors must then review and activate these children. There are two ways to enter categorical eligibility (FRP rates) and activate children: One at a time or multiple at a time.

## Activating Multiple Children at a Time

- From the menu to the left, click *Activate Children.*
- Use the *Find Records* section to filter the records that display.
  - Choose whether to activate children for All Active Centers or the Selected Center. If you choose the Selected Center option, click the Select Center drop-down menu at the top of this page and select the center.

- -Click the Exclude Children if Enrollment Finalized drop-down menu, select Before or After, and then select a date in the corresponding date field.
- -Check the *Include Withdrawn Children Who Were Never Activated* box to include withdrawn children who were never activated.
- \_ Click Go to apply your filters.
- Check the box next to each child to activate. You can also check the box in the table header to select all displayed children. Double-check your selections before proceeding, as this action cannot be undone.

Find Recor	ds									
Selected (	Center	Exclude Children if Enrolment	Finalized							
All Active	Centers	Please select		07/12/2023	C include Withdrawn children who were nev	er Activated 0.0				
									Activity	ee.
		· Control Marrie		a child Manua	a Interference Descent	Connect Recollegest		-	-	
0	123	Jess Center	23	Doe, Jane	8				Income	
8	123	Jess Center	17	jones, Dob		12/15/2020			Income	
63	123	Jess Center	12	Schwalk, Victoria		10/09/2029			Income	
	123	jess Center	10	schidhidhif, andfandf		12/10/2020	-		Income	

Click Activate.

## Activating Children One at a Time

- From the menu to the left, click *Activate Children.*
- Use the *Find Records* section to filter the records that display.
  - Choose whether to activate children for All Active Centers or the Selected Center. If you choose the Selected Center option, click the Select Center drop-down menu at the top of this page and select the center.
  - -Click the Exclude Children if Enrollment Finalized drop-down menu, select Before or After, and then select a date in the corresponding date field.
  - -Check the *Include Withdrawn Children Who Were Never Activated* box to include withdrawn children who were never activated.
  - Click **Go** to apply your filters.

- Click a child's name to access the *Manage Child Information* page.
- Review the child's information and select Active at the top of this page. Your changes are saved automatically.





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# Track Received Claims

The Track Received Claims feature allows you to see which centers have submitted claims for processing. You can print or export this information and use the resulting data to contact centers who are not claiming and act accordingly.

•From the menu to the left, click *Claims* and select *Track Received Claims*. The Track Received Claims page opens.

- In the *Find Records* section, click the *Claim Months* drop-down menu and select the claim month(s) to view.
- Click the Not Received tab. Centers who have not submitted claims for the selected month(s) display in this tab. You can also see whether attendance was recorded, meals were recorded, and the last month in which you processed a claim for the listed centers.
- Print or export the report:
  - Click Print to send the report to your printer.



### What if the center doesn't submit their claim?

If a center does not submit their claim, the sponsor can mark it as submitted on the centers behalf to being processing.

• From the menu to the left, click Claims and select Mark Center's Claim for Processing. The page opens.

			Please select a center
> Clains > Mark Center's Claim for Processing			
Instructions: Use this function to mark a center's claim as ready ocitier will no longer be able to edit served meals in this month	to be processed. After a center's claim is marked, you can proce	ss that claim in the Process Claims function. Also, the	
Claim Month - Select -	•	Submission Date:	
Number of Days with Children Claimed:			
Number of Days with Menu:			
Number of Children Claimedt			

- Select the center that needs to be submitted in the top right corner.
- Choose the claim month. Some claim data populates for the month selected. Review this data for accuracy prior to moving on to the next step.

Click Submit.

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 If an Inconsistent Claim Info box pops up, review the Number or days with children claimed and Number of days with menus again. These numbers might be different if a menu was entered but the center was closed for a holiday or other various reasons. If these numbers are correct, click YES to continue submitting.

The number of days tha menus. If this was done the error.	it you've recorded atter intentionally, click [Yes	ndance doesn't equ ] to continue subm	al the number of days t tting the claim. Otherw	hat you've recorde rise, click [No] and	d correct
				Yes	No
re *	ŧ				

Mark Centers Claim for Processing



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# Process & Reprocess Claims

Once a site submits a claim, process it in KidKare. When a claim is processed, KidKare looks at the data entered into the program and ensures that it meets CACFP requirements.

# **Before You Begin**

Before you begin processing claims, make sure that:

- Center data is accurate.
- Pending children have been activated (if the signed enrollment form has been received).
- . Receipts have been entered and verified.
- School out days have been entered on the school calendar (if applicable).

It is okay if these tasks are not complete by processing time, as errors display for any disallowances once the claim is processed. However, you will save time by ensuring that all data is entered and accurate before you process claims.

## **Processing Claims**

- From the menu to the left, click Claims and select Process Claims. The *Process Claims* page opens. If you do not operate in multiple states, go to *Step 3*.
- Click the **State** drop-down menu and select the state for which to process claims. You can select multiple states, or you can select *All*.
- Click the *Claim Month* drop-down menu and select the correct claim month.
- Click the *Processing Actions* drop-down menu and select *Process New Claims.*
- Clear the box next to each claim you do not need to process. All claims are selected by default.
- Click Process. or, to print the OER, click the down arrow next to Process and select *Process and Print OER*.

## **Review Errors**

Review each error on the OER. Each error results either in an Allow/Warn or Disallow message. Errors resulting in a disallowance are deducted from the reimbursement. Errors resulting in a warning are notification messages that do not deduct from the reimbursement but need to be researched. If there are no claim errors, a Congratulations message displays.

You can correct some errors and re-process the claim.

## **Re-processing Claims**

- From the menu to the left, click Claims and select Process Claims. The Process Claims page opens. If you do not operate in multiple states, go to Step 3.
- •Click the **State** drop-down menu and select the state for which to process claims. You can select multiple states, or you can select All.
- •Click the *Claim Month* drop-down menu and select the correct claim month.
- •Click the *Processing Actions* drop-down menu and select *Reprocess Existing Claims*.
- Click *Process*. or, to print the OER, click the down arrow next to Process and select Process and *Print OER*.

## When to Re-Process Claims

Re-processing claims is sometimes necessary if you process a claim, but some piece of information was incorrect when the claim was processed initially.

- •From the menu to the left, click *Claims* and select *Process Claims.* The Process Claims page opens. If you do not operate in multiple states, go to Step 3.
- •Click the **State** drop-down menu and select the state for which to process claims. You can select multiple states, or you can select **All**.
- •Click the *Claim Month* drop-down menu and select the correct claim month.
- •Click the *Processing* Actions drop-down menu and select Reprocess Existing Claims.
- Click **Process.** or, to print the OER, click the down arrow next to Process and select Process and Print **OER.**





# Send claims back to center to fix errors

If a center submits their claim but needs to edit it for some reason, you can unsubmit the claim for that center.

If the center claim has **NOT** been processed, follow the steps below:

- •From the menu to the left, click Claims.
- •Select **Un-Submit Center Claims.** The Un-Submit Center Claims page opens.
- •Select the claim month for the claim that needs to be sent back to the center, click **GO**.
- •Check the box next to the center for which to un-submit claims.
- •Click *Unsubmit.* The center can now access and edit their claim again. The center must submit their claim again once they are done making changes.

If the center claim HAS already been processed follow the steps below:

- •From the menu to the left, click *Claims*.
- •Select List Claims. The View Claims page opens.
- •Set filters for the claims to view:
  - Select the All Centers option or the Selected Center option. If you choose Selected Center, you must select a center at the top of the page.

- -If you operate in multiple states, click the **State** drop-down menu and select the state(s) to view. You can also select **All States.**
- -Click the *Claim* Month drop-down menu and select the claim month to view. You can also select *All Months.*
- Click Go.
- Click the link in the *Month* column to open the Claim Details page for the claim to un-submit.
- . Click Delete.
- At the confirmation prompt, choose *Claim ONLY* option and then click Delete.

Delete Claim	×
Are you sure you wish t	to delete the claim ONLY?
Claim ONLY	O Attendance and Claim
	Delete Cancel

- Next, click Tools from the menu to the left and select Un-Submit Center Claims. The Un-submit Center Claims page opens.
- Check the box next to the center for which to un-submit claims.
- Click Unsubmit. The center can now access and

## Printing the OER from the Reports Menu

- From the menu to the left, click Reports. Click the
- Select a Category drop-down menu and select *Claims.*
- Click the Select a Report drop-down menu and select Office Error Report.
- Click the Month box and select the month for which to print the report.
- Click the Select Center drop-down menu and select the center for which to print the OER. You can also select All Active Centers to print the OER for all currently active centers.

Click *Run.* The OER downloads as a PDF.

# Printing the OER from the Claim Details Page

- From the menu to the left, click Claims. Select
- List Claims. The View Claims page opens. Set
- filters for the claims to view:

- Select the All Centers option or the Selected Center option. If you choose Selected Center, you must select a center at the top of the page.
  - -If you operate in multiple states, click the **State** drop-down menu and select the state(s) to view. You can also select **All States**.

-Click the Claim Month drop-down menu and select the claim month to view. You can also select *All Months*.

- Click Go.
- Click the link in the Month column to open the Claim Details page for the claim to view.
- Click the Claim Actions drop-down menu and select Office Error Report. The OER downloads as a PDF

Jess Center (1)	23) - March 20	22 Provisional			•	Delete Reprocess		
Meals	Free	Reduced	Paid	Total	Claim Status			
Breakfast	0	0	0	0	Last Processed:	05/24/2022 11:28 AM		
M Snack	0	0	0	0	Claim Source: V	ebCX - Attendance		
Lunch	0	0	0	0	Date Paid: Not?	ret Paid		
PM Snack	0	0	0	0	Date Submitted:	Not Yet Submitted		
Dinner	0	0	0	0	Claim Actions	Claim Actions		
Eve. Snack	0	0	0	0	Adjust Claim 0	Counts		
Participated	0	1	4	5				
Claim Totals								
Attendance		Days	DA Free %		Reduce %	Paid %		
3		2	2	0.00	20.00	80.00		
Federal Total A	mount F	deral Admin Amount	State Total A	mount	State Admin Amount	Amount For Center		
\$0.00		10.00	\$0.00		10.00	10.00		



# Review & Manage Claims

## **View Center Claims**

Once you have created claims in KidKare via the Process Claims function or by manually entering claims, they are added to the View Claims page. Access this page to review, manage, and update claims as needed.

# View the Claims List

- From the menu to the left, click Claims.
- Select List Claims. The View Claims page opens.
- Set filters for the claims to view:
  - Select the All Centers option or the Selected Center option. If you choose Selected Center, you must select a center at the top of the page.

-If you operate in multiple states, click the **State** drop-down menu and select the state(s) to view. You can also select All States.

- -Click the *Claim Month* drop-down menu and select the claim month to view. You can also select All Months.
- Click *Go*. Claims matching the filters you set display.

Selected Center State			Claim M	Claim Month							
All Centers All states			All Months • Go			Clear	Filter				
, °	Center Name	Month	e Ucense e	Free %	Reduced %	• Paid % •	ADA <sup>0</sup>	Total	Submitted	Paid <sup>+</sup> Adjusted	Date/Time Processed
123	jess Center	March 2022	Center	0.00%	0.00%	0.00%	0	\$0.00	No	No	05/24/2022 11:28 AM
123	Jess Center	July 2020	Provisional	0.00%	0.00%	100.00%	1	\$0.00	No	No	10/13/2020 03:42 PM
123	jess Center	October 2020	Provisional	0.00%	0.00%	100.00%	1	\$0.32	No	No	01/25/2021 11:25 AM
123	less Center	March 2022	Provisional	0.00%	20.00%	80.00%	2	\$0.00	No	No	05/24/2022 11/28 AM

- You can do the following in this window:
   Click the link in the *Month* column to view claim details.
  - -Click each column header to sort information in ascending or descending order.
  - Click Filters to customize the columns displayed on this page.
#### Understand Specific Columns in the List Claims Window

The following is a definition of specific columns found on the View Claims page:

- •#: This column displays the number assigned to the center who submitted the claim.
- •Center Name: This column displays the name of the center who submitted the claim. Month: This column displays the claim month for which the claim was submitted.
- •License: This column displays the center's license for which the claim was submitted.
- **Details:** Click View in this column to view claim details.
- •Free %/Reduced %/Paid %: These columns indicate the percentage of children on the claim who are reimbursed at Free, Reduced, or Paid rates.
- •ADA: This column lists the average daily attendance reported on the claim.
- Total: This column lists the total dollar amount of the claim.

- Submitted: This column indicates whether or not you've marked this claim as submitted to the state.
- **Paid:** This column indicates whether the listed claim has been paid.
- Adjusted: This column indicates whether you've made any adjustments to this claim.

#### View Claim Details

The Claim Details window displays detailed information about claims you have processed. This includes the claim source, totals, and rates. You can also reprocess claims, print the Office Error Report, and adjust claim counts in this window.

- From the menu to the left, click Claims. Select
- List Claims. The View Claims page opens. Set
- filters for the claims to view:
  - Select the All Centers option or the Selected
     Center option. If you choose Selected Center, you must select a center at the top of the page.



- If you operate in multiple states, click the **State** drop-down menu and select the state(s) to view. You can also select All States.

- -Click the *Claim* Month drop-down menu and select the claim month to view. You can also select All Months.
- Click Go. Claims matching the filters you set display.
- Click the link in the *Month* column to open the Claim Details page for the claim to view.

Jess Center (1	23) - March 2	1022 Provisional				Delete Aspences
Meals	free	Reduced	Paid	Total	Clean Status	
Breakfast	•	0		0	Last Processed	05/26/2822 11/28 AM
AM Snack	0	0		0	Gaim Source: V	Attendance
Lunch		0	4	0	Date Paid: 1011	ret Paul
PM Snack	0	0	4	0	Data Submitted	Not Vet Submitted
Dinner		0	4	0	Claim Actions	
Eve. Sneck			4	0	Adjust Claim (	Counts
Participated			4	5	_	
Claim Totals						1
Attendance		Data	ADA	Free %	Reduce N	Paid %
3		2	2	0.00	28.00	80.00
Federal Total A	mount	Federal Admin Amount	State Total	mount	State Admin Amount	Amount For Center
10.00					10.00	

- You can do the following in this window:
  - -Reprocess the claim.
  - -Delete the claim.
  - -Adjust claim counts.
  - Print the Office Error Report.
  - View the Claim Summary, Claim Status, Claim Totals, the Claim Error List.

#### **Delete Claims**

Typically, when you delete a claim it is the result of a data entry error. If the claim you need to remove has not yet been submitted to the state, you can completely delete the claim from your system.

*WAIT*: Has this claim been submitted and/or paid? If so, do not delete it. You must zero the claim amounts, instead.

- From the menu to the left, click Claims.
- Select List Claims. The View Claims page opens.
- Set filters for the claims to view:
  - Select the *All Centers* option or the Selected Center option. If you choose Selected Center, you must select a center at the top of the page.

-If you operate in multiple states, click the **State** drop-down menu and select the state(s) to view. You can also select All States.

- -Click the *Claim* Month drop-down menu and select the claim month to view. You can also select All Months.
- Click Go.

- Click the link in the *Month* column to open the Claim Details page for the claim to un-submit
- Click Delete.
- At the confirmation prompt, choose *Claim ONLY* option or the *Attendance and Claim option.*







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Click Delete.



Submit Claims to the State

After claims are processed and reprocessed as needed, and the claims are ready to be submitted, you will generate an upload file to enter into the CNP site. Note: KidKare does not automatically put your data into CNP, you will run a report in KidKare and enter the claims data into the state site.

#### **Generating Claim Reports**

To access the upload file and/or to view claim reports:

•From the menu to the left, click *Claims*.

- •Select **Submit Claims to State**. The Submit Claims to State page opens.
- •Ensure that the correct claim month is selected.

Submit Claims		Reports				
State	CA	•	Center Claim Totals		Center Name	
Corporation	IGNORE					Run
laim Month	May 2023	•				_
abmission Batch	All Submissions					
xport Files	State Claim File					

 On the right side of the screen, click the Reports drop down and select *Center Claim Totals* to generate a single file containing all data needed to enter claims into the CNP site.



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### Submit Claims to State for Sponsors

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#### Marking Claims as Submitted

When you have filed a claim or are about to file a claim with your state agency, mark the claim as submitted in KidKare. When you mark claims as submitted, all processed claims are bundled together in a submission batch with the current date. If you later need to adjust any of these claims, or if any claims come in late, those claims are kept in a separate submission batch. This way, you can easily separate your original claim from any amended claims submitted to the state agency. This is helpful for audits. To mark claims as submitted:

- From the menu to the left, click Claims.
- Select **Submit Claims to State.** The Submit Claims to State page opens.
- Ensure that the correct claim month is selected.
- Click the Submission Batch drop-down menu and select Not Yet Submitted.

Submit Claims			Reports		
State	CA		Center Claim Totals	Center Name	
Corporation	IGNORE				Run
Claim Month	May 2023	•			
Submission Batch	All Submissions	•			
Export Files	State Claim File				

• Click Mark as Submitted.

Once you mark a claim as submitted, all claim records associated with the claim are locked. Any changes made to the claim after you mark it as submitted are considered adjustments.



## eForms for Sponsors

- ° About eForms
- ° Add a Signature for eForms
- ° eForms Settings for Center Sponsors
- ° Enable SNAP Validation for eForms
- ° Enable Centers for eForms
- ° Customize eForms Email Templates
- ° Send Renewal Invitations with eForms
- ° Send New Enrollments with eForms
- ° View eForm Invitation Statuses
- ° Approve & Renew Enrollment with eForms
- ° Print Completed eFormd Records

### About eForms

eForms is an all-in-one enrollment process for the food program that eliminates paper forms for centers and your back-office. With this feature, you can send enrollment invitations directly to parents, track enrollment status, and approve and renew child enrollment with a single click

- Add a Signature to KidKare: Each form you approve and renew through eForms requires your signature. Before you approve and renew forms, add your signature to KidKare.
- Adjust eForms Settings: When you allow your centers to use eForms for enrollments, you can further customize the actions they can take. For example, you can specify that your centers must review and approve enrollments before forms are sent to you for final approval/renewal. These settings are located on the Settings page in KidKare.
- *Enable Centers for eForms:* Give centers access to the eForms feature. Centers remain enabled until you disable them.

- Send Invitations: Send invitations to parents/centers to update child enrollment forms. Use filters to select the centers/children to which to send invitations. Parents with an email address on file automatically receive an email that invites them to update child enrollment and/or income eligibility information online.
- Centers: Centers can view a list of all sent invitations, which allows them to follow-up with parents, have parents update enrollments online using a device at the center, cancel invitations (if needed), or even fill out paper forms (centers can then mark the form as completed on-site). Depending on your settings, centers must approve each enrollment before sponsors can renew it.



- View Invitation Status: You can see how many new enrollment forms and/or income eligibility forms have been completed, started (but not finished), canceled, and so on. The eForms feature provides an overview of all statuses across all centers who use the eForms feature.
- Approve & Renew: Once the enrollments are complete, review them by comparing the old forms to the new forms. You can also view parent signatures. Once you've reviewed the data, update the information in KidKare with the click of a button.



### Add a Signature for eForms

Each form you approve and renew through eForms requires your signature. Before you approve and renew forms, add your signature to KidKare in the Add Signature popup. To do so:

KidKare

• Click *Welcome* in the top-right corner, and select *Add Signature*.



- Click the *Type Signature* box and type your name.
- Using your mouse, finger, or stylus, sign the *E-Signature* box.
- Click Accept & Sign.





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### **eForms Settings** for Center Sponsors

When you allow your centers to use eForms for enrollments, you can further customize the actions they can take. These settings are located on the Settings page.



- . The Settings page opens.
- In the Center Access section, set eForms to Yes to allow your centers to access eForms in KidKare. If you need to customize this permission for specific centers, you can do so on the Enable Centers page. For more information, see Enable Centers.

enter A	locess	^
쓭	Kids	
71	Food Program	Yes (III)
	Claims	Yes (III)
R	eForms	Yes 💷
Ø	Reports	Pes (II)
8	Setup	Yes (III)

- next
- In the eForms Settings section, click to each option to enable it. You can change settings for the following:

Would you like to require sites to approve enrollment forms?

Would you like to require sites to approve enrollment forms?

- Would you like to require sites to approve income eligibility forms? Who can send new enrollment requests?
- Are sites allowed to send new enrollment requests to parents?
- If a parent completes infant feeding details, do you want to indicate that the infant form is on file for the child?
- If a parent indicates they participate in SNAP, would you like to require them to provide their SNAP number for validation?
- Would you like to require SNAP/TANF number validation for parents to submit their forms?
  - ° Select Disallow for this option to ensure the correct numbers are entered.

eForms Settings		
Who can approve enrollment forms?	Both	•
Who can approve income eligibility forms?	Both	
Who can send new enrollment requests?	Both	
If a parent completes infant feeding details do you want to indicate that the infant form is on file for the child?	Yes 💷	
If a parent indicates they participate in SNAP, would you like to require them to provide their SNAP number for validation?	(Yes (II)	
Would you like to require SNAP/TANF number validation for parents to submit their forms?	(Yes (III)	
Would you like to disallow or warn the parent of incorrect formatting?	Warn	•
Would you like to hide the 'Open Online Forms' button?		

Note: If you require your sites to approve either form type, ensure that they add a signature to KidKare. Direct them to **this help article** for instructions. If you select "SITE" under the first two approval settings, the sponsor will not be able to approve or renew any eForms. If you select "**SPONSOR**" under the first two approval settings, the site will not be able to approve or renew any eForms. Use the option "**BOTH**" in order to allow the sites and/or sponsor to make final approvals on eForms.

•Your changes are saved automatically.

*Note*: You can only change the approval dropdown options in eForms settings if there are no current eForms pending. If there are eForms pending, those must be approved or cancelled in order to adjust these settings.



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#### eForms Settings for Sponsors



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### Enable SNAP Validation for eForms

You can require that SNAP/TANF numbers be validated before parents can submit their forms. Validation ensures that the parent provided a correctly formatted SNAP/TANF number when completing income eligibility information.

When you enable this feature, you can also specify whether the parent is warned and able to submit their forms or whether parents cannot continue completing their forms until the number is formatted correctly.

#### To do so:

- Clic
- . The Settings page opens.
- In the eForms Settings section, click next to Would you like to require SNAP/TANF number validation for parents to submit their forms? This enables SNAP/TANF validation.

eForms Settings	
Would you like to require sites to approve enrollment forms?	Yes 💷
Would you like to require sites to approve income eligibility forms?	Yes 🕕
Are sites allowed to send new enrollment requests to parents?	Yes (III)
If a parent completes infant feeding details do you want to indicate that the infant form is on file for the child?	
If a parent indicates they participate in SNAP, would you like to require them to provide their SNAP number for validation?	(II) No
Would you like to require SNAP/TANF number validation for parents to submit their forms?	

- Next, specify what to do when a parent inputs an invalid SNAP/TANF number:
  - Set this to Disallow: The parent will receive a message advising them that the provided SNAP/TANF number is invalid, and they will be unable to complete and submit the form until they correct it

### **Enable Centers for eForms**

If you have not done so already, access the Settings page and ensure that eForms is enabled in the Center Access section.

- From the menu to the left, click eForms.
- Click Enable Centers.
- Use the Center and Status boxes to filter the centers that display.
- Click (III) in the **Status** column to enable or disable eForms status for the listed center.



- Click Review Changes.
- Ensure that your changes are correct.
- Click Save.





### Customize eForms Email Templates

Customize the emails parent/guardians receive when you send enrollment invitations, send forms back for revision, and approve enrollments. You can also customize the Thank You email sent when the parent submits their information to you or your center.

- From the menu to the left, click eForms. Click Send
- *Invitations.* The Send Invitations page opens.
- Click *Edit Email*. The Initial Invitation Template page opens by default.
- Click the drop-down menu at the top of the page and select the template to edit. For example, select *Thank You for Your Submission Template* to edit the automated email parents/guardians receive upon form submission.

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- •Click *Edit* in the bottom-right corner. The Rich Text Editor (RTE) opens. You can edit the *Subject*, *From*, and *Message* fields.
- •Variables you can use are listed at the bottom of the editor. To use this variables, click in the message and type the variable exactly as it appears. These will populate user-specific information in the message when it is sent. For example, #ParentName# will display as John Smith if this email is sent to John Smith.
- •Click *Add Attachment* to add an attachment to this message.
- When finished, click Save.

### Send Renewal Invitations with eForms

- From the menu to the left, click eForms.
- Click Send Invitations.
- Set filters for the centers/children to include.
  - -Click the **State** drop-down menu and select the state(s) to view. This option is only available if you are set up for multiple states.
  - -Click the *Centers* drop-down menu and select the specific center(s) to view.
  - -Click the *Child Expired and Expiring Within* drop-down menu and select 30 Days, 60 Days, 90 Days, or Custom Date. If you select Custom Date, set a date range in the *From/To* boxes.
  - Click I next to *Hide Invitations That Are Currently Open* to hide open invitations. This is set to No by default.
  - -In the *What Forms Would You Like to See* section, click elect Enrollment, Income Form, or both.

- Click Go.
- Check the box next to the child/center to which to send an invitation. You can also check the box at the top of the column to select all displayed records.

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 Click and select All, EF, or IEF. Parents with an email address are emailed directly. displays next to children for whom there is no email address on file.



## Send New Enrollments with eForms

Sending enrollment forms to new participants can be completed at the sponsor level, or at the site level as long permissions are set. Note that these are the same steps a center would follow to send an enrollment form to a new participant.

- From the menu to the left, click Observer Mode.
- Select the Center in which you are wanting to enroll the new participant.
- . From the menu to the left, click Children.
- . Click List Children.
- Click and select Send eForms. Note that the Add button defaults to this selection upon page revisit.

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Mosages	If you anoth the to send enrulment forms for multiple children in the same household, you can add another child. This will allow the guardian to only complete the income Higdnity form of applicables once for their household.	
6 сеснер	+ Add Child	
d Logout		

- Complete the Participant Details section.
  - -Click the *First Name* and Last Name boxes and enter the participant's first and last name.
  - Click the *Birth Date* box and enter the participant's birth date.
  - -Click the *Classroom* drop-down menu and select the classroom to which to assign the participant. You can select *Unassigned* to assign the participant to a classroom later. You can also click **c** to add a new classroom.
  - -If you need to enroll a sibling at the same time, click *Add Participant*. Repeat *Steps 3a - 3c* for the additional child. You can add as many siblings, as needed. Adding children this way ensures that the parent only needs to complete one income eligibility form for the household.

- Complete the *Guardian Details* section.
  - Click *Existing* to select an existing parent/guardian. Then, select the contact.
  - Click New to add a new parent/guardian and enter their information.
- Click Send Invitation.

#### What Do I Do if the Guardian Does Not Have an Email Address?

If the guardian does not have an email address, they can complete the form on-site.

•From the menu to the left, click *eForms*.

- Click View Status.
- Locate the appropriate record. For instructions, see <u>View Status.</u> If you are a sponsored center, see <u>Work</u> with eForms for Sponsored Centers.
- •Click in the column to the far right. This opens the form on the device you are using.

•Have the guardian complete and sign the form.

#### **Next Steps**

Once parents complete the necessary enrollment and income eligibility forms, you must approve and renew participants on the <u>Approve & Renew</u> page. For more information, see Approve & Renew. You can also monitor enrollment status on the <u>View Status</u> page. For more information, see View Status.



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#### eForms Enroll New Participants Online



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### View eForm Invitation Statuses

The View Status page provides an overview of your centers' invitation statuses. You can see how many invitations have been sent, how many are complete, and so on.

- From the menu to the left, click eForms.
- Click View Status



-Set filters for the information to view.

 Click the State drop-down menu and select the state(s) to view. This option is only available if you are set up for multiple states.

- Click the *Centers* drop-down menu and select the specific center(s) to view.
- ° Select EF, IEF, or both.
- Click the Invitation Sent Date drop-down menu and select 30 Days, 60 Days, 90 Days, or Custom Date. If you select Custom Date, set a date range in the From/To boxes.
- ° Click Go.
- -Click each column to sort information in ascending or descending order.

- -Click a center name to view that center in Observer Mode.
- Click next to Export and View or All to export eForms status information.
  - **Export View:** This exports the information displayed on the View Status page.
  - **Export All:** This exports complete invitation status details.

Once you have invitations in the Submitted status, you can approve and renew them. For more information, see *Approve and Renew*.

#### Customizing the View Status Page

Click *Filters* in the top-right corner to choose which columns to display. You can also filter by access to the eForms feature. Possible columns include:

- Name Number
- State
- Total Sent
- Not Started
- In Progress
- Needs Approval

- Submitted
- Sponsor Approved
- Manually Completed
- Renewed
- Canceled



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#### **Invitation Statuses**

STATUS	DEFINITION
Not Started	The parents have not started filling out the form yet.
In Progress	The parents have started filling out the form, but have not yet finished.
Needs Approval	The form needs to be approved (by you or the center).
Submitted	The parent or the center has submitted the form to you.
Sponsor Approved	You have approved the forms.
Manually Completed	The parent completed a paper form.
Renewed	You have updated the system with the new date.
Canceled	The invitation was canceled.

### **Approve & Renew Enrollment with eForms**

Enrollment information is not updated in KidKare until you approve and renew enrollments on the *Approve & Renew* page. This allows you to control when enrollment information for your centers is updated. However, remember that children updated with a future enrollment date may be disallowed from the current claim.

In most cases, it is better to wait until the current claim is processed before renewing enrollments. For example, if your new enrollment start date is 10/1, you should wait until the September claim is processed before renewing enrollments.

When you have forms ready to review, a notification displays in the top-right corner of the page over the bell icon. The example below shows a notification that some centers have forms ready for approval and renewal.

You can approve and renew forms at the same time, or you can approve and renew the forms as two completely separate steps. Each step is described below:

- •Approve: Review forms and check for errors. For example, check numbers for categorically eligible forms, verify parent signatures, review changes, compare last year's information with the updated information, and so on.
- •*Renew:* Once you approve the forms, renew them. This updates the data in KidKare. Remember to keep timing in mind for this step.
- •Approve and Renew: Approve and renew forms in one step.



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#### Eforms Approve & Renew for Sponsors



#### **Before Renewing Forms**

Before you renew forms and update data in KidKare:

- Review and approve forms.
- Verify that the new dates will not cause disallowances on the current claim.

Verify that you have added your signature to KidKare. For more information, see *Add a Signature for eForms.* 

#### **Approving and Renewing Forms**

- From the menu to the left, click eForms. Click
- Approve & Renew. The Approve & Renew page opens.



- In the Show Records For section, set filters, as needed.
  - -Click the **State** drop-down menu and select the state(s) to view. This option is only available if you are set up for multiple states.
  - -Click the *Centers* drop-down menu and select the specific center(s) to view.
  - -Click the *Date* drop-down menu and select 30 Days, 60 Days, 90 Days, Current Year, or Previous Year.
  - -Click next to Only Show Forms That Have Already Been Approved to filter to only those forms that have already been approved.
  - Click Go.

*Note*: You can also click **Filters** in the top-right corner to set additional filters and sorts, as well as to specify which columns display on the page.

• Check the box next to the record(s) to update.

*Note*: Click **View Forms** to view the forms you are approving/renewing.

- Do one of the following:
- Bulk Edit: In the Bulk Edit section, set new dates in the Bulk Set New Enrollment Date, Bulk Set New Enrollment Expiration Date, and Bulk Set New IEF Expiration Date boxes. Click Apply. Click Approve or Approve & Renew.
- Accept Parent Signature Dates: Click Approve or Approve & Renew.

*Notes*: If you do not have a signature set up in KidKare, you are prompted to add one once you click Approve/Approve & Renew. You can also click a child's name to view their record and edit information, as needed. When finished, click **Approve or Approve & Renew.** 

#### Sending Forms Back for Revision

If a form requires revision, you can send it back to the parent for changes. To do so:

- On the Approve & Renew page, locate the appropriate child.
- •Click the child's name. The Child Information page opens.
- Click Send Back for Revision.

	Approve IEF	Approve & Renew IEF
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- Select the form(s) to send back (EF, IEF, or both).
- Click the text box and enter notes for the parent. This information is included in the email sent to the parent.
- . Click Send.

#### **Exporting Approval Information**

- Click 
   next to Export and View or All to export
  - approval information.
- Export View: This exports the information displayed on the Approve & Renew page.
- *Export All:* This exports complete approval data.



### Print Completed eForms Records

Completed eForms are stored within KidKare. You can retrieve and print these forms, as needed. However, we do recommend that you simply store a digital copy, if needed. Remember, you can retrieve these forms from KidKare at any time.

- From the menu to the left, click eForms.
- Click *Reports.* The Reports page opens.

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- In the Show Records For section, set filters for the forms to view.
- -Select Enrollment or Re Enrollment.
- -Select the form type. You can choose from *EF*, *IEF*, *or All Form Types*.
- Select the center(s) to view. You can select as many centers, as needed, or you can select *All Centers.*

- Select the date range to view. You can select Current Year, Previous Year, or Custom Date. If you select Custom Date, use the From/To boxes to set a date range.
- •Click *Run.* Reports meeting the limits you set display.
- To download an individual form, click *View Form.* A PDF downloads. You can then print this PDF, as needed.
- To print multiple forms at once:
- -Check the box next to each form to print.
- -Click *Combine & Print Forms.* The forms you selected download.



### Enable Messaging for Centers

Before you can use KidKare's messaging features, you must enable center messaging on the Settings page.

Click

. The Settings page opens.

next to

 In the Center Access section, click Messages. Your changes are saved automatically.

~	Messages	( <b>*s</b> ())
	Setup	Yes (II)
	Reports	Yes III
	eForms	Yes (II)
I	Claims	Yes (1)
1	Food Program	Yes (II)
<u>1</u>	Kids	
nter Acc	tess	

#### Message Centers in KidKare

KidKare's messaging feature allows you to send messages directly to your centers in KidKare. Your sites can then review and respond to these messages, allowing both of you to keep a record of communications online.

- Click . The Messages page opens to the Received tab by default.
- Click Send Message. The Message Editor opens.

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- Click the Send To drop-down menu and select the center(s) to message. You can use the Search box in this menu to search for specific centers. To message all centers, select All Centers.
- Click the **Subject** box and enter a subject for this message.
- Click the *Message* box and enter the contents
- of your message. To add an attachment to your message:
- Click Add Attachment and select File.
  Browse to the location on your computer where the attachment is stored.

• Click the *Signature* box and enter your email signature.

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• When finished, click Send.

#### Center Sponsors: View Received Messages

Received messages display in the Received tab on the Messages page. It is divided into the following columns: Received From, Subject, and Date. You can also see the total number of messages, as well as the number that are unread at the bottom of this page.

• Click 🔄 . The Message page opens and displays the Received tab by default. Your messages display in a table. Unread messages display in bold.

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• Click a message to view the message content.



- If your center has attached a file, click the file name in the *Attachments* section to view and download it.
- When finished, click the *Received* tab to return to your received messages list.
- Use the **Search Messages** box to filter the messages that display. The message list is updated as you type.



- To mark messages as read/unread:
  - -Check the box next to the messages to mark as read/unread. You can also check the box at the top of the column to select all messages.
  - -Click Mark as Read or Mark as Unread.
- To archive messages:
  - -Check the box next to the messages to archive. You can also check the box at the top of the column to select all messages.
  - -Click Archive Selected. The messages you selected are moved to the Archived tab.

#### Center Sponsors: View Sent Messages

You can view messages you have sent in the Sent Messages tab. Like the Received tab, the Sent Messages tab is divided into the following columns: Sent To, Subject, Reports, and Date. The total number of messages and unread reports display at the bottom of the table.

• Click 🔄. The Messages page opens.

• Click the Sent Messages tab.

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- •To mark sent messages as read/unread:
  - -Check the box next to the message(s). Check the box at the top of the column to select all messages.
  - -Click Mark as Read or Mark as Unread.

•To archive messages:

- -Check the box next to the message(s) to archive. Check the box at the top of the column to select all messages.
- -Click *Archive Selected.* The messages are moved to the Archived tab.

To view message reports, click the link in the *Reports* column. For more information about message reports, see *View Message Reports*.

*Note*: You can also send messages from this tab. Click Send Message and select the recipients.

#### Center Sponsors: View Message Reports

Message reports provide useful data for your sent messages, such as the number of recipients who opened the message.

#### To view this report:

- Click 🔽 . The Messages page opens.
- Click the Sent Messages tab.
- Click the link in the *Reports* column for the message to view. The message report opens.



• This report is divided into the following sections:

- Message Details: This section displays the message subject, content, and sent date. It also provides the number of recipients who have opened the message and the number of recipients who have responded to any attached survey.
- Questions: This section displays any survey questions you included in your messaging. If you did not include a survey in your message, this section does not display.
- Report: This section provides a review of recipients who have opened the message.



## How to Train Your Sites

To review all training videos for your sites click the button below:



Scan the QR code to view the full center training page or click <u>here</u>.

https://support.kidkare.com/ok-sponsored-center

### Here are the first 4 set of videos you should have your centers watch:





# **KidKare Support**

### **Technical Support Contact**

We constantly strive to enhance our customer support and ensure that you have access to the appropriate resources when you require our assistance. This resource guide will assist you in identifying the most effective procedures for obtaining the necessary support for you and your team.

#### KidKare Training and Knowledge Base

Our Training Hub and Knowledge Base are filled with every resource you may need to help with all of our products and features. We suggest starting here first:



Email Oklahoma@KidKare.com





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