KidKare

Manual for SFSP and At-Risk Open Enrolled Sites
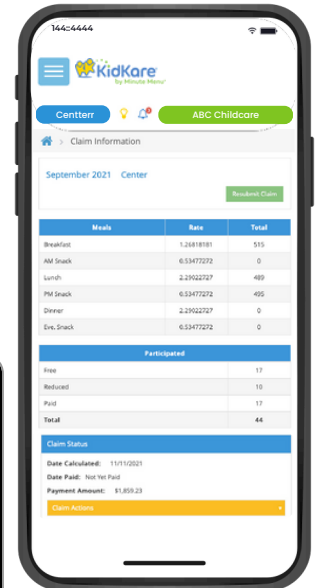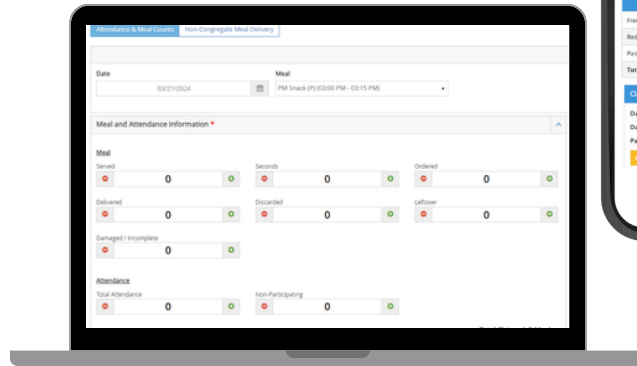
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Logging into KidKare

How to access your account & update password

www.kidkare.com

Click above to watch a quick video or visit
https://support.kidkare.com/ok-school-food-authorities
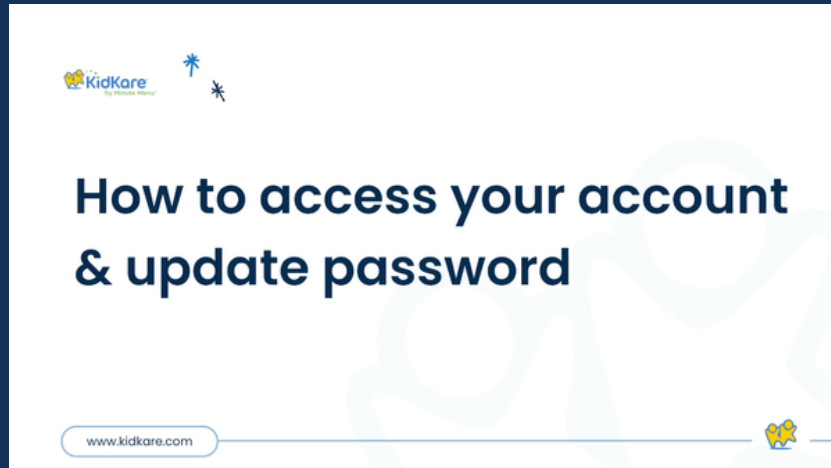
SFA Sponsor Checklist

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**.

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.

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

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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 *Create Sponsor Staff Roles.*

- 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 **Create Center Staff Roles** for more information on creating pre-set permission sets.
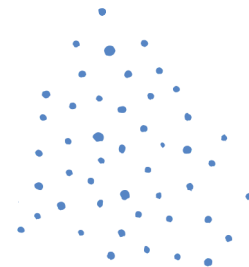
- From the menu to the left, click *Tools.*
- Select *Sponsor User Permissions.* The Sponsor User Permissions page opens.
- Click ✏ next to the user for whom to update permissions. The User Details page opens.
- Scroll to the *User Permissions* section.

- Next, click ⦙⦙⦙ 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.

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*.

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities
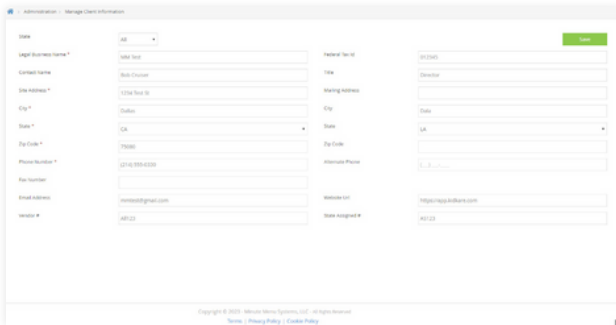
Review Your Account Information

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.

- 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.

Enroll & Manage Sites

Enroll Sites

All centers are pre-enrolled based on data provided by OSDE. When a new center is approved for the food program, OSDE will add it to your KidKare account. If you do not see one of your sites, email Oklahoma@KidKare.com with the agreement number and site name to get the site added to your KidKare account.
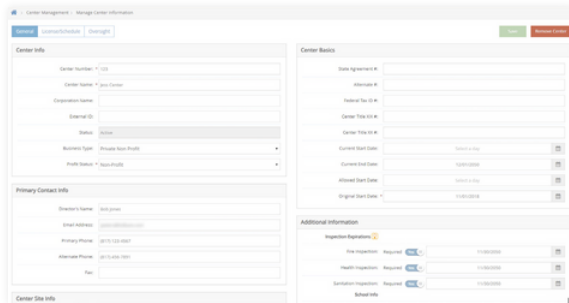
Manage Sites

All centers are pre-enrolled based on data provided by OSDE. 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.

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.

- The *Manage Center Information* page opens. This window is divided into three tabs:

  - General

  - License/Schedule

  - Oversight

- 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.

> *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.*

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.

• Click *Continue.*

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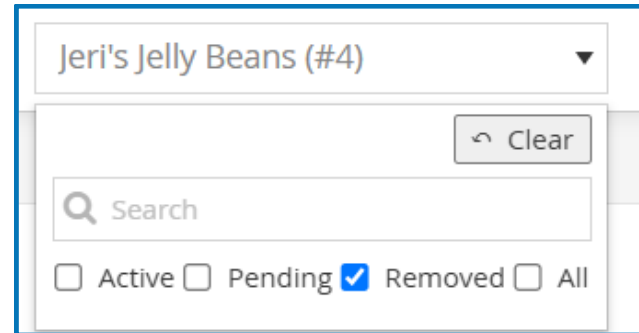
> *Note*: To view information for centers you've removed, check the Removed box in the Select Center drop-down menu to include Removed Centers in the menu.

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.*

Set At-Risk Program School Dates

If you sponsor centers who participate in BOTH normal CACFP food program AND At-Risk, 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 *Oklahoma@kidkare.com*.

Note - if all of your sites are At-Risk only, this is not required.

Set Center Admin Permissions

You can control what areas of KidKare a site can access. If you don't want your sites to handle menus, you can hid this from them so they don't see it when they login.

- 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.
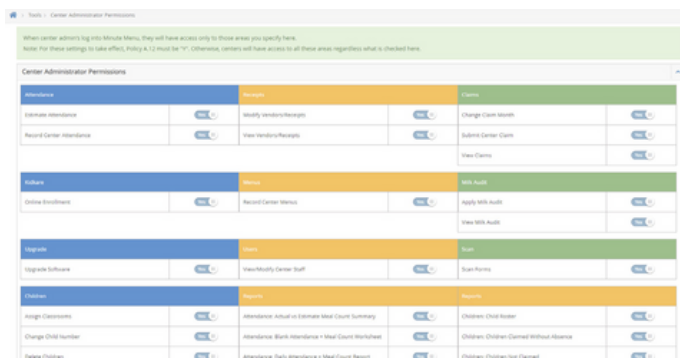
Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

Manage Site Login

You only need one login per site. This login can be found and modified in the Center Information. You can provide sites their logins manually, or send Welcome Letters via email.

- From the menu to the left, click *Center Management,* **then select** *Manage Center Information.*
- Select the Center you are wanting to preview in the top right corner.
- Choose the Oversight tab.
- In the section named Center Login you will see a username and password. You can use these as they are, or modify them to something easier for the site to remember.
- Click Save if any changes were made.

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. This is not a required step, you can also provider your sites with their logins via email or using our QR code sheet on .

- 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.*

- 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.*

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Send Center Welcome Letter

Use KidKare to send welcome messages to centers. This welcome message will either include installation and login information for KidKare.

- 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.

- Make changes to the email, as needed.

- When finished, click *Send.*

KidKare Login

Site: _____

Username: _____

Password: _____

Watch this video on how to mark attendance and meal counts in KidKare

Watch this video on how to submit documents at the end of the day.

Observer Mode

What is Observer Mode

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

- Login to KidKare.

- Select **Observer Mode** from the menu on the left.

- Click on the site you want to observe.

- 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.

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities
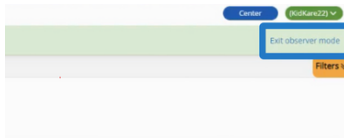
Menu
Templates

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.

Menu Templates

www.kidkare.com

Click the image above to watch a quick video or visit
https://support.kidkare.com/ok-school-food-authorities

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 ⌄ 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.

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.

- When finished, click *Save*

Master Menus – Create, Assign, & Copy

www.kidkare.com

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

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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.
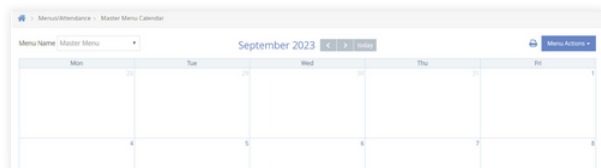
• Select *Copy.*

• The Copy Menus pop-up opens.

• Select *Infants, Non-Infants,* or both.

• Click *Day.*
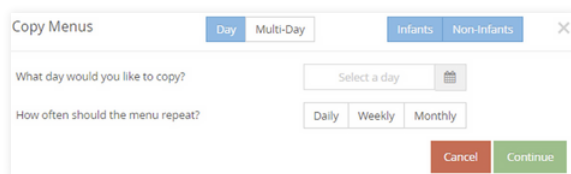
• Click the *Select a Day* box and enter the day to copy. You can also click 📅 to select the date from a calendar.

• 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.
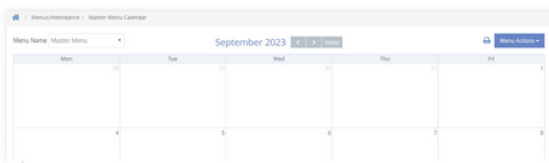
- Select *Copy.*

- 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.*

Master Menus – Create, Assign, & Copy

www.kidkare.com

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

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.
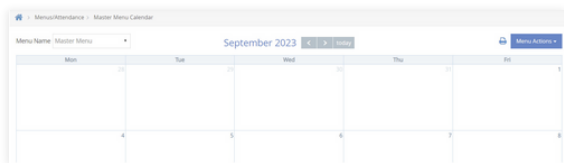
- Select *Assign.*
- The *Assign* pop-up opens.
- Select which centers will get this menu, click *Save.*
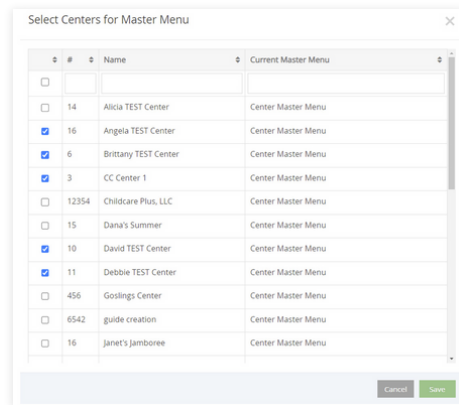
- Click *Menu Actions* again, select *Send.*
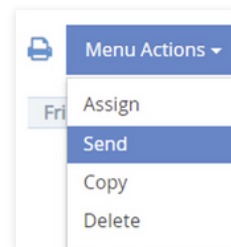
- Click *Menu Actions* again, select *Send.*
- A confirmation pops-up, click *Yes*, then ok.

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
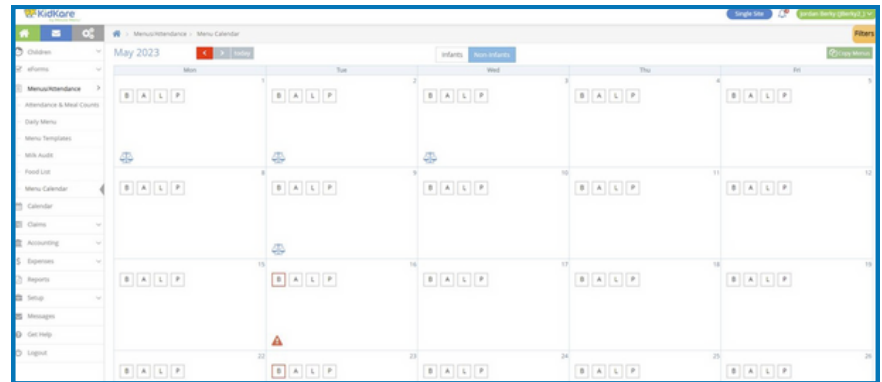
Calendar Display

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:

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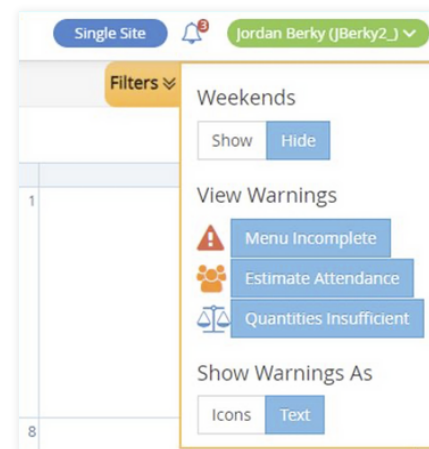
- Click a day to access the Daily Menu page for that day. You can also click an empty date to add a meal to a day where meals have not yet been planned or served.

- 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. ⚖️

KidKare by Minute Menu
KidKare for Sponsors

Center Menu Calendar for Sponsors

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Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities
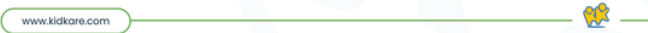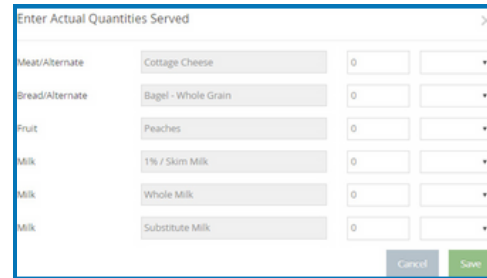
Record Actual Quantities

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

- 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

www.kidkare.com

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 sites 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   Delete Save

		Actual Quantity Served		Attendance Summary		

Actual Quantity Served

Attendance Summary

Meat/Alternate · ⊕

Age	Estimated	Actual
1 yr	0	0
2 yr	0	0
3-5 yr	0	0
6-12 yr	0	0
13-18 yr	0	0
Adult	0	0
Total	0	0

Bread/Alternate · General Mills - Wheat Chex ⊕
Is this whole grain-rich? Yes
Calculate Oz Eq for 1 Serving

Vegetables · ⊕

Fruit · Peaches, canned - #10, drained ⊕

Milk · MILK - 1% over 2 / Whole under 2 / Substitute as required ⊕

Meal Pattern Requirements

Menu Notes
Peaches served but had apples as a backup
Almond Milk served for substitute

CN Label Item

Lunch Meal Time: 12:00 PM - 01:00 PM

Menus   Delete Save

Actual Quantity Served

Attendance Summary

Meat/Alternate · CN Label Meat/Meat Alt (CN # in notes) ⊕

Age	Estimated	Actual
1 yr	0	0
2 yr	0	0
3-5 yr	0	0
6-12 yr	0	0
13-18 yr	0	0
Adult	0	0
Total	0	0

Bread/Alternate · CN Label Bread (insert CN # in notes) ⊕
Is this whole grain-rich? No
Calculate Oz Eq for 1 Serving

Vegetables · CN Label Vegetable (CN # in notes) ⊕

Fruit/Vegetable · Cantaloupe, fresh ⊕

Milk · MILK - 1% over 2 / Whole under 2 / Substitute as required ⊕

Meal Pattern Requirements

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

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Generic Options

Lunch	Meal Time: 12:00 PM - 01:00 PM		

Menus   🗑 Delete   ✓ Save

Actual Quantity Served

			Attendance Summary		
Meat/Alternate	Chicken Breasts ▾	➕	Age	Estimated	Actual
Bread/Alternate	Bread, generic (bread type in notes) ▾	➕	1 yr	0	0
	Is this whole grain-rich? Yes ⦿		2 yr	0	0
	📋 Calculate Oz Eq for 1 Serving		3-5 yr	0	0
Vegetables	Cauliflower, frozen ▾	➕	6-12 yr	0	0
			13-18 yr	0	0
Fruit/Vegetable	Green Beans, canned - c ▾	➕	Adult	0	0
Milk	MILK - 1% over 2 / Whole under 2 / Substitute as required ▾	➕	Total	0	0

Meal Pattern Requirements

Menu Notes

Grilled chicken breast served on homemade wheat buns

Snack Example

PM Snack	Meal Time: 04:15 PM - 04:45 PM		

Menus   🗑 Delete   ✓ Save

Actual Quantity Served

			Attendance Summary		
Meat/Alternate	Cheese Cubes ▾	➕	Age	Estimated	Actual
Bread/Alternate	Saltines ▾	➕	1 yr	0	0
	Is this whole grain-rich? ⦿ No		2 yr	0	0
	📋 Calculate Oz Eq for 1 Serving		3-5 yr	0	0
Vegetables	▾	➕	6-12 yr	0	0
			13-18 yr	0	0
Fruit	Apple Juice ▾	➕	Adult	0	0
Milk	▾	➕	Total	0	0

Meal Pattern Requirements

Menu Notes

100% apple juice, cheddar cubes

35

Lunch Example

Lunch	Meal Time: 12:00 PM - 01:00 PM	⚠ 👥 ⌃

Menus　　　　　　　　　　　　　　　　　　　　🗑 Delete　⊘ Save

Actual Quantity Served

Meat/Alternate	Ground beef, fresh or frozen ▾	⊕	
Bread/Alternate	Food Club Tortilla - Whole Wheat Fajita Size ▾	⊕	
	Is this whole grain-rich? **Yes** ⬤		
	🧮 Calculate Oz Eq for 1 Serving		
Vegetables	Lettuce And Tomato ▾	⊕	
Fruit/Vegetable	Black Beans, canned - #10 heated, drained ▾	⊕	
Milk	MILK - 1% over 2 / Whole under 2 / Substitute as required ▾	⊕	

Meal Pattern Requirements

Attendance Summary

Age	Estimated	Actual
1 yr	0	0
2 yr	0	0
3-5 yr	0	0
6-12 yr	0	0
13-18 yr	0	0
Adult	0	0
Total	0	0

Menu Notes

Taco Tuesday! Served with a side salad and side of salsa

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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	

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) ▼

Serving Size [1] Slices (slic) ▼

Serving Weight [45] grams (g) ▼

1 Serving = [1.50 oz eq]

Cancel Save

Center Attendance & Meal Counts

Use KidKare to track attendance and meal counts for ARAS/SFSP open enrolled sites. You can enter Served meals, Seconds, Attendance, and much more all from the convenience of a tablet, phone, or computer!

- From the menu to the left, click Menus/Attendance.
- Click on Attendance and Meal Counts. The meal counter screen opens.

- Ensure that the correct Meal Type and Date are selected.

- There are 2 ways to enter Meal Counts:
  - Meal Counter:
    - Use the ⊕ button to the right of each field each time you add a meal or attendance count.
    - Use the ⊖ button to the left of each fields to remove a meal or attendance count.
  - Manual Entry:
    - You will be able to click in the blank number field and manually type in the total.

- Complete all fields required to be completed by your sponsor.
- Ensure that the Total Attendance has been entered. If the Total Attendance is blank, it will not allow you to save.
- Click SAVE.

Center Attendance
& Meal Counts Video

Open Enrolled Attendance & Meal Counts

www.kidkare.com

Click the image above to watch a quick video or visit
https://support.kidkare.com/ok-school-food-authorities

Menu Notes

Use KidKare to track attendance and meal counts for ARAS/SFSP open enrolled sites. You can enter Served meals, Seconds, Attendance, and much more all from the convenience of a tablet, phone, or computer!

- From the menu to the left, click Menus/Attendance.
- Click on Attendance and Meal Counts. The meal counter screen opens.
- Before saving, notes must be entered into the Notes field.
  - If there are no notes, changes, replacements, damaged meals, delivery issues, temperature issues, etc. N/A is acceptable.

KidKare
Sign In Sheets

OSDE will be requiring that sites that are using a physical sign in sheet start utilizing the KidKare Sign In Sheet instead. This is required in order to standardize OSDE forms across the state.

Printing Sign-In Sheets

- From the Attendance and Meal Count screen, click the orange button that says Sign in Sheets
- Select Daily in the top field.
- Select Blank Sign in Sheet in the bottom field.
- Click OK. The sign-in sheet is generated and can be saved and printed as needed.

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Digital Transportation Logs

When transporting food from a Central Kitchen to a site, a transportation log is required. OSDE allows 2 ways of collecting this data. You can utilize KidKare Transportation Logs, or continue to do it on paper and upload the image of the current transportation log being used through Messages as seen on page .

Transportation Logs

Click the image above to watch a quick video or visit
https://support.kidkare.com/ok-school-food-authorities
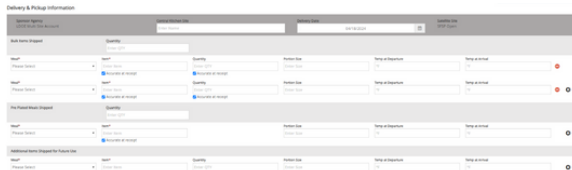
Meal Delivery/Pickup
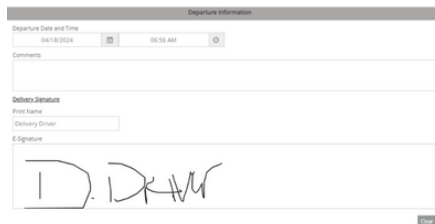
This feature can be found in the Menus/Attendance section of your menu. These forms can be initiated by the Central Kitchen and completed as the food arrives at the site.

To create a new form:
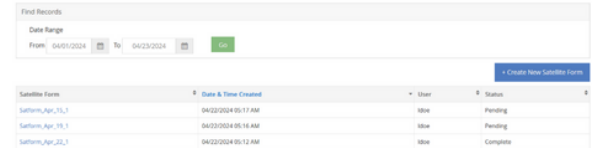
- From **Menus/Attendance**, click **Meal Delivery/Pickup**.
- Click [+ Create New Satellite Form] in the top right corner. The blank form opens.
- The delivery person will enter the information for items being delivered. This can be entered at the Sponsor level, delivery driver level, or site level depending on how your organization operates. Use the ⊕ on the right to add additional lines to each section.

- Once Items and temperature at departure are entered, the deliverer will enter the time and date the delivery is leaving the facility and add a digital signature at the bottom of the page. Then click **Save**.

- Once the delivery arrives onsite, whoever received the order will complete the form.
- From **Menus/Attendance**, they click **Meal Delivery/Pickup.**
- Select the form that needs to be completed. Forms are named with the month and day the form was started (Month_day_form#). Note that in the **Status** column, it shows which reports have been completed and which are still pending. A report is marked as completed when both signatures have been added and saved.

- The form opens with data entered by deliverer already.
- Enter Temps at Arrival for items that require temperatures. Complete any other missing information as needed.
- Once completed, the receiver will enter the time and date the delivery is leaving the facility and add a digital signature at the bottom of the page. Then click **Save**.
- One both signatures are entered and saved, the form is locked down and cannot be adjusted.

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Review Completed Forms

- From the menu to the left, click **Reports**.
- In the category drop down, select **Meals & Attendance**.
- Choose **Pickup/Delivery Tracking**.
- Select the date range to review forms for.
- Click **Run**.
- Forms with digital signatures generate in a pdf format as shown to the right.

Note: If you choose to use the KidKare digital form, there is no need to print and store these forms. KidKare stores them for 3 years plus the current year.

Attendance - Bulk Entry

When you have more than one open enrolled sites, you will see an option for Attendance - Bulk Entry in your main menu. This feature is where sponsors can enter meal counts, attendance, delivered/ordered totals, leftovers, on behalf of the site. Uses for this screen include

- Entering meal counts and attendance should a site lose internet connection and revert back to paper. *Note: Making any changes to Total Attendance or Served is allowed, but sponsors must have paper backup of these updates on file.*
- Adding data that you do not require your sites to enter such as meals delivered or ordered.
- Pull quick reports on total meals served, delivered, leftover for one or all sites.
- Review total for all centers for each meal.

To access this feature:

- From the menu to the left, click on Menus/Attendance.
- Select Attendance - Bulk Entry. The bulk entry screen loads.

Center	Ordered	Delivered	Total Attendance	Served	Seconds	Non-Participating	Discarded	Leftover	Damaged / Incomplete	Leftover Milk Count	Staff Meals (19+)	Meals respid after svc
DAD At-Risk - No Children - GA	0	0	0	0	0	0	0	0	0	0	0	0
Katie's Little Tots	150	150	123	123	7	5	3	5	0	12	3	0
SFSP - Open Enrolled - No Kids	0	0	118	118	12	0	0	0	0	0	0	0
Total for all centers	**150**	**150**	**241**	**241**	**19**	**5**	**6**	**9**	**0**	**12**	**3**	**0**

- Use the fields at the top to select the meal and date you want to view.
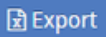
Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

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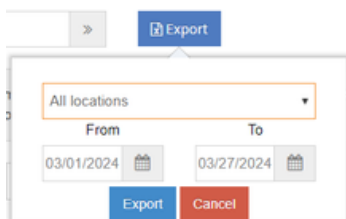
- To make changes or updates, click in the number box and type in the updated number. There is no save button, the changes will be saved automatically

- To export the data, click the [Export] button to the right of the meal/date fields.
- Choose one specific location to export data for, or choose All Locations.
- Select the date range you want to see the date for, click Export. The Served Meals Report generates as an excel document.
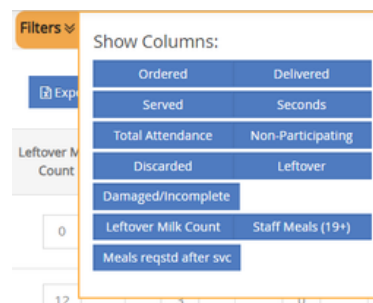
- If there are fields on the Bulk Attendance screen that will not ever be used, remove them from the screen by clicking the Filters ⌄ button in the top right corner of the screen. Unselect the fields you want to hide.

Reports

KidKare has many reports so feel free to pull them all and take a look. All reports can be found under the Reports section of your main menu in KidKare. The most common reports are listed below:

- **Monthly Claimed Meal Count Summary** - This report lists the total number of meals claimed for a selected claim month. Centers can also print this report in KidKare.
- **Center Daily Meal Count Summary** - This report lists the total attendance and meal counts per meal type for the date(s) selected.
- Pickup/Delivery Tracking
- **Center Monthly Menu Plan** - This is a monthly calendar that shows each meal and component that has been entered into KidKare for the selected month. Infants and Non-Infants each have their own monthly calendar. Meals are notated by the starting letter "B" for Breakfast, "A" for AM Snack, etc. Note that if you use **Menu Templates** when entering your meals, the template name appears in bold and underlined font above the component list.
- **Menu Notes Report** - This report will pull only menu notes entered on the daily menu screen for the month selected. This report can be used to track substitutions from the planned menu, notate additional items served or replacement items for food allergies, track when CN labels are used, or utilized for any other need you may have. It is an open field on the daily menu that can be used and reported on as needed.
- **Monthly Receipt Total Report** - This report combines all expenses entered for the selected month and generates a report with the totals by category and a grand total for the month.

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.

-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 ↻ in the *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.*

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

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.

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

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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.

- Enter the number of pints, quarts, half-gallons, 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 ➕ 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.

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Add Receipts: Quick Entry

You will use Quick Entry to add expenses that you currently do **NOT** 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.

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

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.

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

Receipt FAQs

- What if I have vended meals?
  - If you have vended meals, you can enter the total charged by your vendor as a quick entry. This can be done once a month at the end of the month. Once quick entry receipt for all charges for the current claim month will suffice.

- What if I have a Central Kitchen and purchase all of the site food with one receipt?
  - If you email Oklahoma@KidKare.com and let us know which site you will be entering receipts under, KidKare can turn off the receipt requirement for all sites but one. This allows you to enter all of your program receipts under one site.

- Do we still have to keep the original receipts?
  - Yes, all original receipts must be kept for audit purposes until receipt capture is being used (coming the end of 2025)

- Do I have to record my Food Program Labor if I already have it in my payroll system?
  - Yes. You can choose to record your food program labor in KidKare by day, week, or month. If you are already tracking your Food Program labor in a payroll system that breaks down employee, rate, and hours worked on food program, then you can enter one receipt at the end of the month for the total dollars spend on food program labor.

Review Milk Audit

Milk Audit for 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 🖊 , enter the new amount, and click ✅ .

> *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.

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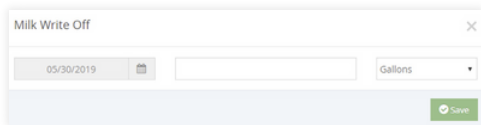
Use the Daily Calendar to view and/or add milk events, such as purchases or write offs.

- Click *Show Daily Calendar.* The Daily Calendar displays at the bottom of the window. The Calculated version is shown in the figure below.
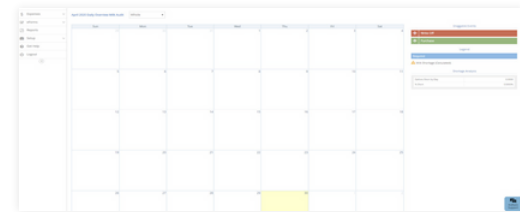
- Click the drop-down menu and select the milk type. You can choose from *Whole, 1%/Skim, or Substitute.*

- 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.

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.
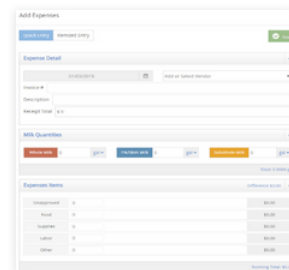
Note: You must have the *Vendor/Receipts* permission enabled on your account to access and work with Purchase events. If you are a sponsored center, your food program sponsor must enable this feature.

° Drop it on the day on which to apply it. The Add Expenses pop-up opens.

° 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.

- ⚠️ ***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.

- ⚠️ ***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

Calculated	
Gallons Short by Day	72.6406
% Short	100.0000%
Actual	
Gallons Short by Day	0.0000
% Short	0.0000%

KidKare
KidKare for Sponsors

Milk Audit for Sponsors

www.kidkare.com

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

Milk Audit FAQs

- **What if I have vended meals?**
  - If you have vended meals, you can enter the total amount of milk sent to each site by creating a $0 quick entry receipt for each site. This can happen on a daily, weekly, of monthly basis. As long as the milk totals received are entered prior to the claim being processed.

- **What do I do if I order all of the milk for multiple sites on one receipt?**
  - You can enter the receipt total dollars on your primary center. Then you would enter a $0 receipt for milk quantities sent to each site. For example: You purchase 500 ½ pints of milk for 3 sites totaling $500.00. Enter the full receipt as you would with your normal expenses under Site A. If you gave Site A 200 half pints, enter that into the milk quantities in this receipt and total it $500.00. Then create a receipt for Site B for $0 and enter the 150 half pints you sent them. Do the same for Site C with the remaining 150 half pints.

- **How do I enter donations?**
  - For any donated milk, you will create a vendor for "milk donation" and in the description add who donated it and the quantity donated. Enter the total as $0.

- **What if I purchase in other quantities than gallons?**
  - When entering milk purchases, there is an option in the receipt to change gallons to half pints, half gallons, etc.

- **Do I have to do my starting inventory each month?**
  - You should not have to enter your starting inventory each month, it will roll over from the previous month. That being said, you have to enter milk purchases, spills, spoilage, and actual amounts served in order for it to track properly.

Prepare to Process Claims

Ensure Correct 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.
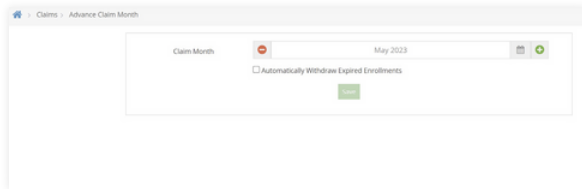
- Click ➕ to advance the claim month, and click ➖ to move the claim month back.
- Click *Save.*

Advance Claim Month

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

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:
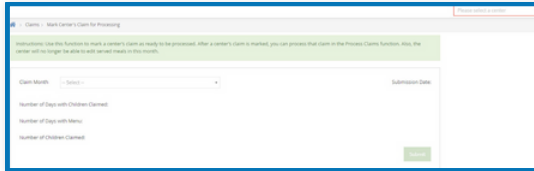   - Click *Print* to send the report to your printer.

Track Received Claims

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities
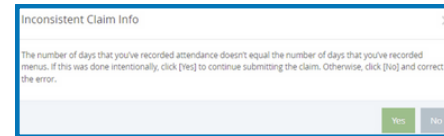
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What if the center doesn't submit their claim?

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.

- 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.

- 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.

Mark Centers Claim for Processing

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

Claims Video

*Click the image above to watch a quick video or visit
https://support.kidkare.com/ok-school-food-authorities*
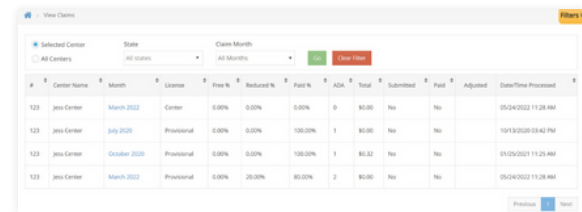
Review & Manage Claims

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.

- 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.

-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.
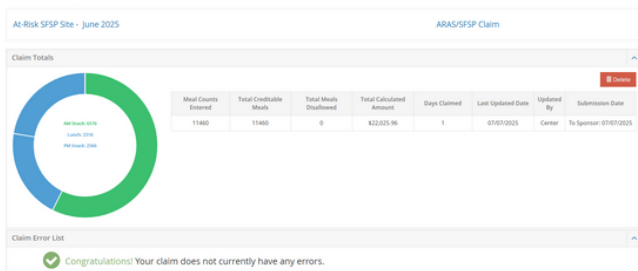
- You can do the following in this window:

    -Delete the claim
    -See any claim errors

    -Review any Sponsor level additions or

    removals of meals completed via Bulk

    Attendance after the claim was send by the

    site

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.
    -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 delete

- Click *Delete.*

- At the confirmation prompt, choose **Yes** to continue deleting this claim.

Are you sure you want to delete the claim? Please note that deleting a claim will not alter the Meals and Attendance counts that were recorded for any given day in a month.
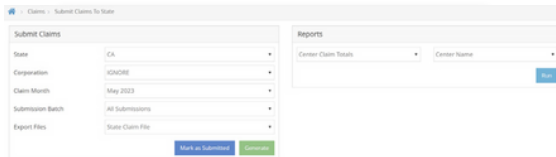
🗑 Yes   Cancel

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.

• 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.
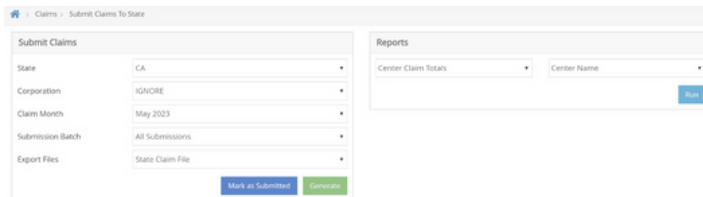

Submit Claims to State for Sponsors

Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

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.*

- 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.

Documentation Requirements

The following documentation is required to be entered into KidKare on a weekly basis at minimum per OSDE.

- Sign in Sheets
- Meal Counts taken on paper or through other software's
- Transportation Logs not completed via KidKare
- Any supporting documentation for menus or menu changes
- Any other documentation that you might provide the state when they come out to do a review

Note: Once documents are confirmed and sent via KidKare messages, the physical copy no longer needs to be stored

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Click the image above to watch a quick video or visit https://support.kidkare.com/ok-school-food-authorities

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.
- In the Center Access section, click 〔III〕 next to *Messages.* Your changes are saved automatically.
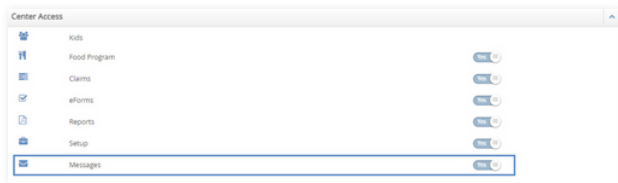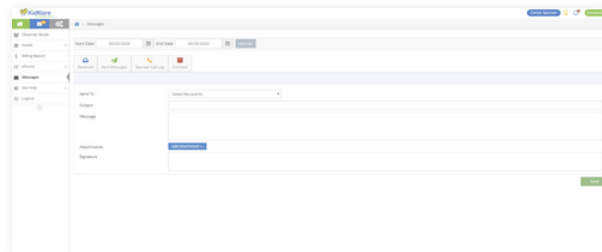

Message Centers in KidKare

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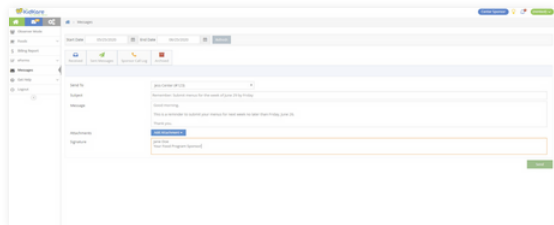
- Click 📧 . The Messages page opens to the Received tab by default.
- Click *Send Message.* The Message Editor opens.

- 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.
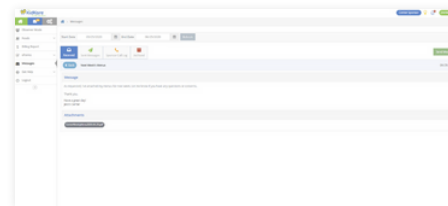

- When finished, click *Send.*

SFAs: 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 [envelope icon] . The Message page opens and displays the Received tab by default. Your messages display in a table. Unread messages display in bold.
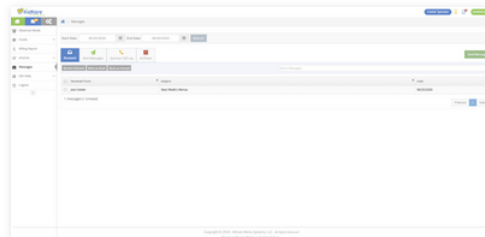
- Click a message to view the message content.

- 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.
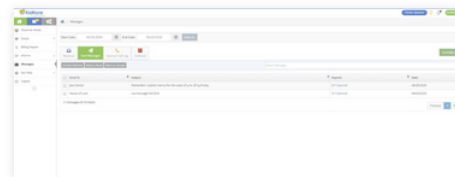
- To mark messages as read/unread:

  - 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.

SFAs: 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.

- 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.
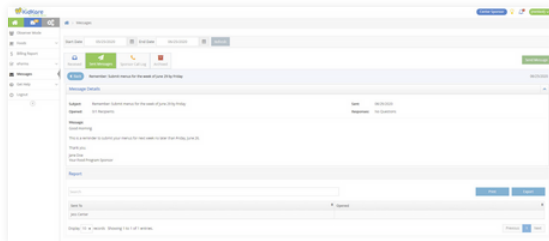
SFAs: View Message Reports

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 **here**.

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:

Training Hub

Email
Oklahoma@KidKare.com