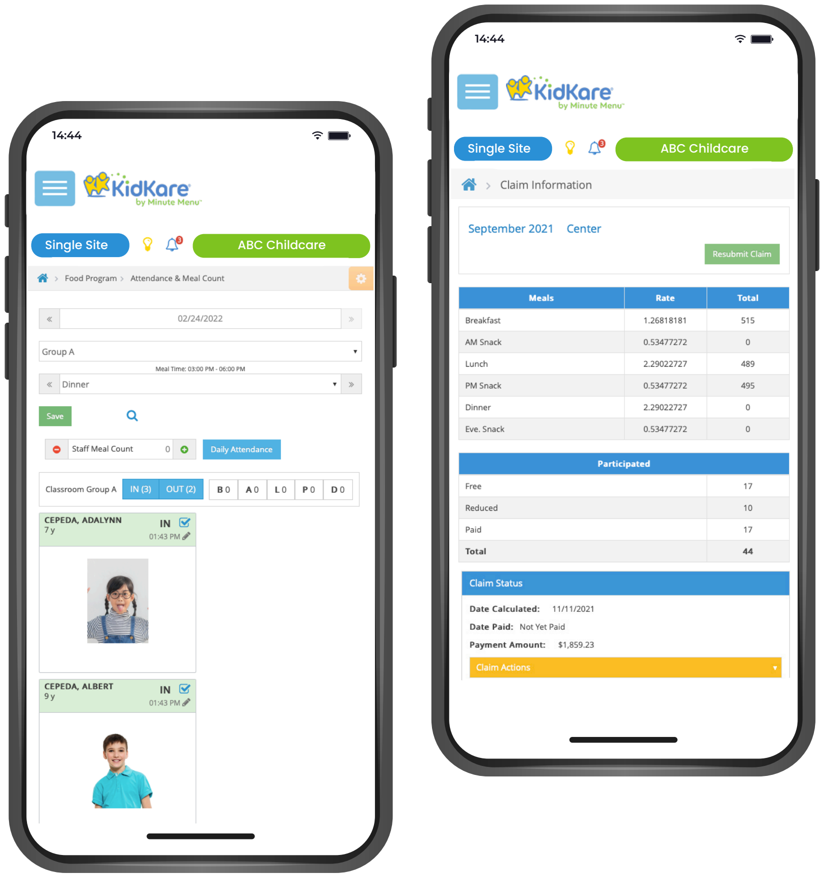
KidKare Food Program

Single-Site Manual
October 2023



Online Manual
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www.kidkare.com

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Stay Connected to Families with Ease

KidKare Support

Setup Your Site

Site Details

- From the menu to the left, click Administration.
- Click Site Details. The Site Details page opens.
- You can edit the following information:
    - **Business Details:** Basic information about your center, including site name, profit status, business days, and so on. ***Site Name and State Sponsor ID should be entered exactly as it shows in the CNP site in order for your claim to work.***
    - **License Details:** License and program information, including program type, maximum capacity, and license start/end dates. If your state allows for multiple licenses, you can click Add License to add additional licenses. ***State Site ID should be entered exactly as it shows in the CNP site in order for your claim to work.***
    - **CACFP Meals:** CACFP information, including CACFP start date, approved meals, servings, and serving times. If you are approved for Before School Breakfast and After School Snack, please refer to ***page 29*** on how to set that up.
    - **Subscriber/Subscription Details:** These sections do not need to be edited as you are not paying for KidKare, your state is.
- Click Edit in the appropriate section and update the information, as needed. When finished, click Save.

Video Link: ***Site Details & Homepage Tour***

Site Settings

You can control several different aspects of KidKare on the Settings page, including the language you see, your default landing page, and so on.

- From the menu to the left, click . The Settings page opens.
- In the Display Settings section, you can:
    - Click the Language drop-down menu and select Spanish to view KidKare in Spanish.
    - Click the What Page Would You Like to See When You Login to KidKare drop-down menu and select the page you wish to default to when accessing KidKare.
    - Click the What Would You Like to Call the Participants in Your Program drop-down menu and select what to call program participants throughout KidKare.
    - In the eForms Settings and Center Settings section, click next to each option to enable it. Below is an image showing how your site should be setup per LDOE policies. Your site should be set up exactly as shown below.

Display Settings

eForms Settings

If a parent indicates they participate in SNAP, would you like to require them to provide their SNAP number for validation?	Yes
Would you like to require SNAP/TANF number validation for parents to submit their forms?	Yes
Would you like to disallow or warn the parent of incorrect formatting?	Disallow

Center Settings

Do you want to record daily in/out times for children?	No
Would you like to require center staff to certify the accuracy of attendance when saving Attendance & Meal Counts in KidKare?	Yes
Do you want to record actual quantities served after meal service?	Yes
Would you like to ignore, warn, or disallow insufficient quantities served?	Disallow
Do you want to use the food list calculation to record actual quantities for Bread/Alt & Infant Cereal foods?	Yes
Do you want to remind users (Daily Menu/Menu Calendar User Interface) if the actual quantities served are less than the required quantities?	Yes
Do you want to ignore, warn, or disallow for milk shortages when processing claims?	Disallow
Do you want to require center staff to record infant meals by infant?	Yes
Do you want to use ounce equivalents when recording Bread/Alt & Infant Cereal foods?	Yes

Create User Permissions

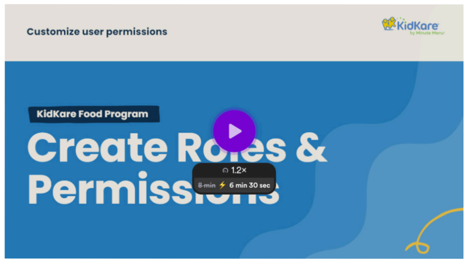
User permissions and user roles allow you to control who on your staff can access certain information. KidKare comes with a standard set of user roles that include the following:

- Director
- Administrator
- Teacher
- Nutrition

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.

Adding New User Roles

1. From the menu to the left, click ***Administration***.
2. Click ***User Permissions.*** The User Permissions page opens.
3. Click the ***Roles & Permissions*** tab.
4. Click ***Add Role.***
5. Click the ***Role Name*** box and enter the name of the role.
6. Click ***Save***. The role is added to the displayed table. All permissions for the new role are set to No by default.



Customizing User Roles

- From the menu to the left, click ***Administration.***
- Click ***User Permissions.*** The User Permissions page opens.
- Click the ***Roles & Permissions*** tab.
- The standard roles and their permissions display.
    - Each set of permissions is divided into the following categories:
        - Center Administration
        - Food Program & Purchases
        - Reporting
- Click next to each permission to enable or disable in each category. Your changes are saved automatically.
- Repeat this step for each Role that exists.

Create User Accounts

Add Users

- From the menu to the left, click ***Administration.***
- Click ***User Permissions.*** The User Permissions page opens.
- Click ***Add User.*** The Add User pop-up opens.
- Enter the user's ***first name, last name, and email address.*** The email address is optional.
- Select a role for the 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.***

Updating User Information

1. From the menu to the left, click ***Administration***.
2. Click ***User Permissions.*** The User Permissions page opens to the ***Users*** tab by default.
3. Locate the user to change. Click ***Filters*** to the top-right to filter the user list by status and sort by first or last name.
4. Click next to the user to edit. The User Details page opens.
5. Click each box and enter new information over the existing information.
6. In the ***User Permissions*** section, use the sliders to add and remove permissions. You can also click ***Reset Permissions*** in the ***System Access*** section to set the user's permissions to the default for their assigned role.
7. When finished, click ***Save***.

Removing or Deactivating Users

- From the menu to the left, click ***Administration***.
- Click ***User Permissions.*** The User Permissions page opens to the Users tab by default.
    - To ***Deactivate*** a user, use the slider under the Active/Inactive columns to deactivate an account. You would use this feature for seasonal employees or other employees that might be leaving but coming back in the future.
    - To ***Remove*** a user, Click next to the user to remove the user and user details.

Video Link: ***Roles & Permissions Video***

Reset User Passwords

While you can reset user passwords, you cannot see any permanent passwords. Instead, you can either send a system-generated email to the user's email address, or you can set a temporary password and provide it to the user.

- From the menu to the left, click ***Administration.***
- Click ***User Permissions.*** The User Permissions page opens to the Users tab by default.
- Click  next to the user to edit.
- In the ***System Access*** section, click ***Click to Reset.***
    - If there is an email address saved to the user profile, an automated email containing instructions on resetting their password is sent to the user.
    - If there is no email saved to the user profile, enter a temporary password for the user. Then, click ***Save (checkmark icon).*** You must provide the password to the user. It can only be used once, so the user must reset their password upon login.

Manage Classrooms

Add Classrooms

- From the menu to the left, click ***Administration***.
- Select ***Manage Classrooms.***
- 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. Ex: Short name = "1" or "Bumblebees" Full Name = "Classroom 1" or "Bumblebee Classroom"
- Click the ***Building Name*** box and enter the building in which this classroom is located, if applicable. If not, the default is set to N/A

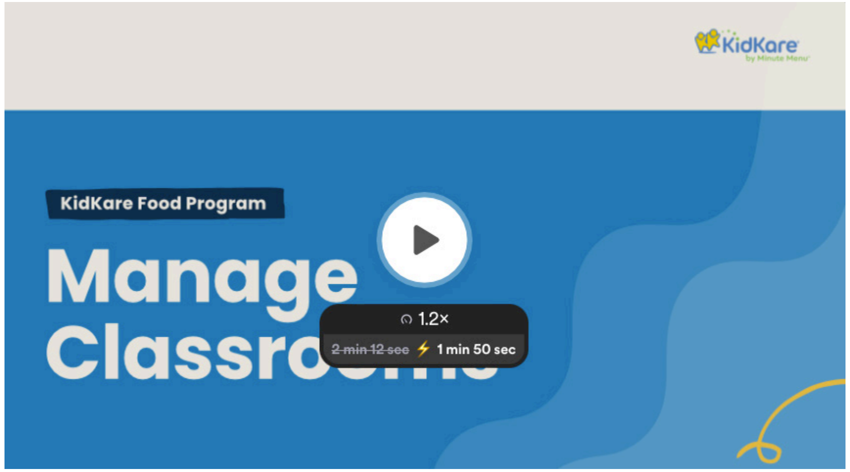
Edit Classrooms

- From the menu to the left, click ***Administration.***
- Select ***Manage Classrooms.***
- Click the classroom to update under the ***Short Name*** column. The center name is in blue text.
- 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 ***Administration.***
- Select ***Manage Classrooms.***
- Click the classroom to delete under the ***Short Name*** column. The center name is in blue text.
- The Edit Classroom pop-up opens.
- Click ***Delete.***

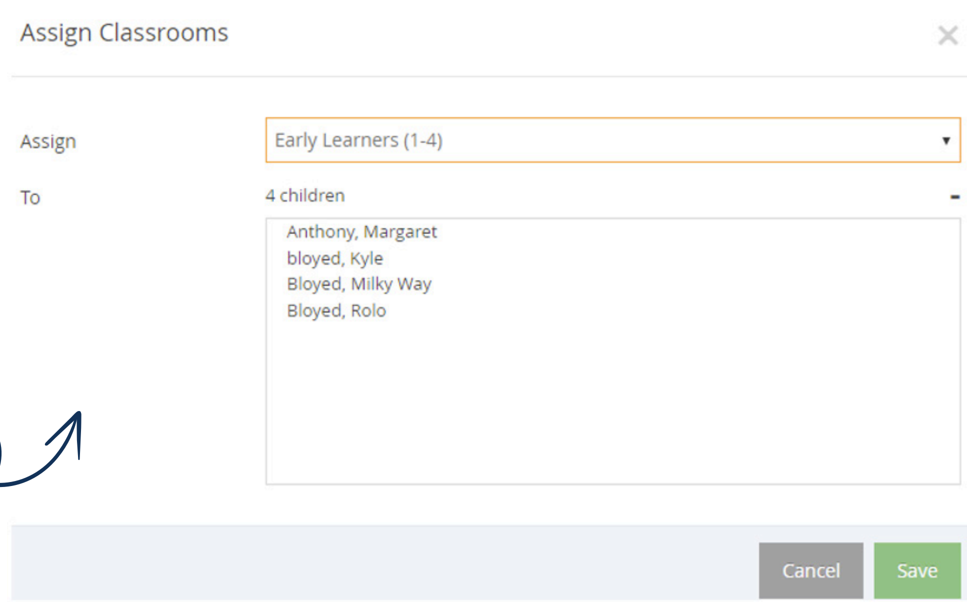
Note: You can only delete classrooms to which children are not currently assigned. If a classroom has children assigned to it, the Delete option does not display.



Assign Classrooms

Add Classrooms

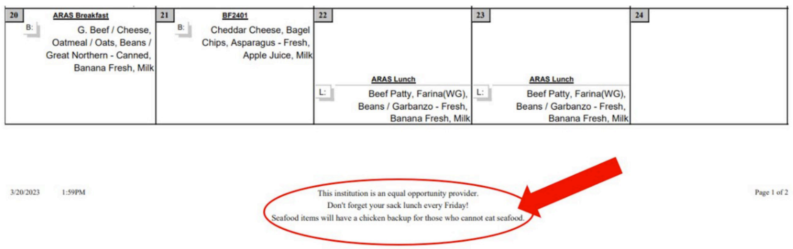
- From the menu to the left, click ***Administration.***
- Select ***Assign Classrooms.***
- Check the box next to each child you are assigning to a specific classroom.
- Click ***Assign Classrooms.*** The Assign Classrooms pop-up opens.
- Click the ***Assign*** drop-down menu and select the classroom to which to assign the children.
- Click Save.



Video Link: ***Assign Classrooms***

Manage Menu Footers

- From the menu to the left, click ***Administration.***
- Click ***Manage Menu Footers.***
- Enter the ***Menu Footers*** you want at the bottom of your Non-Infant and Infant Menus. Click ***Save.***
- Menu Footers will show at the bottom of the ***Center Monthly Menu Plan Report*** and the ***Center Weekly Menu Report*** as shown below.



20	21	22	23	24
ARAS Breakfast B: G. Beef / Cheese, Oatmeal / Oats, Beans / Great Northern - Canned, Banana Fresh, Milk	BF2401 B: Cheddar Cheese, Bagel Chips, Asparagus - Fresh, Apple Juice, Milk	ARAS Lunch L: Beef Patty, Farina(WG), Beans / Garbanzo - Fresh, Banana Fresh, Milk	ARAS Lunch L: Beef Patty, Farina(WG), Beans / Garbanzo - Fresh, Banana Fresh, Milk	

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This institution is an equal opportunity provider.
Don't forget your sack lunch every Friday!
Seafood items will have a chicken backup for those who cannot eat seafood.

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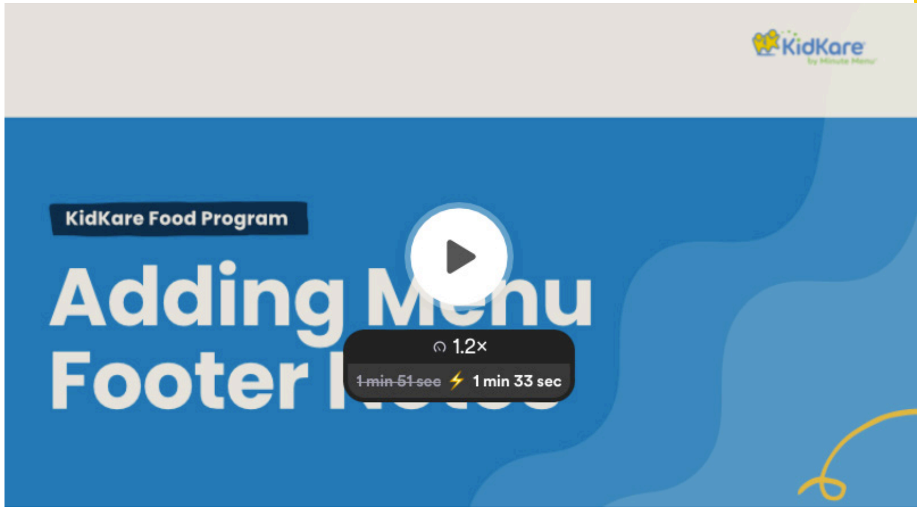
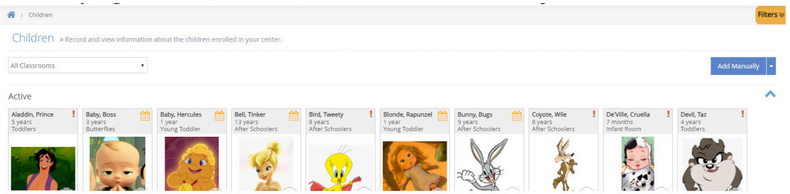


Enroll & Manage Participants

Enroll New Participants

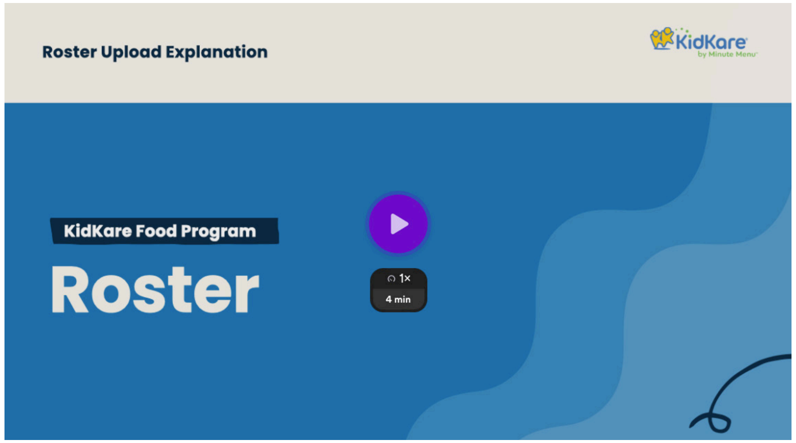
- From the menu to the left, click ***Children.***
- Then click ***List Children.***
- In the top right corner, Click and select ***Add Manually.***



- In the ***Name*** section, enter the participant's first, middle, and last name. You must enter at least a first and last name.
- In the ***Birth Date*** section, enter the participant's birth date. You can also click to select the date from a calendar.
- In the ***Enrollment Details*** section:
  - Click the ***Classroom*** drop-down menu and select the classroom to which to assign the participant you are enrolling. Select ***Unassigned*** to assign the participant to a classroom later. You can also click to add a new classroom.
  - Click the ***Enrollment Date*** box and accept the default enrollment date (today's date), or change it. The ***Enrollment Expiration Date*** box populates automatically. It is set to one (1) year from the enrollment date you entered.
  - Click the ***IEF Expiration Date*** box and enter the date on which the participant's income eligibility expires. In most cases, this is the same date as the enrollment expiration.

- In the ***Participant Details*** section, select the participant's race, ethnicity, and gender. You must at least select a race and ethnicity.
- Click Next.
    - If you are enrolling a non-infant, the Primary Guardian page opens. Go to ***Step 10.***
    - If you are enrolling an infant, the Infant Details page opens. Continue to ***Step 8.***
- On the Infant ***Details*** page:
    - Click the ***Formula Offered*** box and enter the name of the formula you offer to infants. The formula name you enter here will populate this box automatically for future infant enrollments. This box is required, unless the parent is providing formula/breast milk.
    - If the parent is providing breast milk, click next to ***Will the Parent Provide Breastmilk.***
    - If the parent is providing formula, click next to ***Will the Parent Provider Formula.*** If you set this to Yes, you do not have to enter anything in the Formula Offered box. Enter the formula name in the corresponding ***Name*** box.
    - If the parent is providing food, click next to ***Will the Parent Provide Food.***
    - Click next to ***Infant Form on File*** to indicate that you have a form on file for this infant. Though you do not collect individual infant forms in Louisiana, you will always select ***Yes*** for this option.
- Click ***Next.*** The Primary Guardian page opens.
- 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.

- In the ***Days in Care*** section, select the days and times the participant is typically in care.
    - Select the days and in and out times. When entering times, you can click the to select the time with arrows.
    - Click the slider next to ***Will Pick Up and Drop Off Times Vary*** if the participant's in/out times vary each day.
    - Click the slider next to ***Will Child Stay Overnight*** if the participant will stay at your center overnight at any time.
- In the ***Participating Meals*** section, click each meal in which the participant participates.
- In the ***CACFP Eligibility*** section:
    - Select this participant's reimbursement level: ***Free, Reduced, or Paid (Above).***
    - Click the ***FRP Basis*** drop-down menu and select the determining factor of the participant's reimbursement level.
    - If this participant qualifies as Free/Reduced under a federal assistance program (such as SNAP), click the ***Qualifying Program #*** box and enter the participant's program number.
    - Click next to ***Is This Participant the Dependent of a Migrant Worker*** if this participant is a migrant worker's child.
- Click ***Enroll Participant.*** The View Participant page opens. You can now make changes to this participant's information.

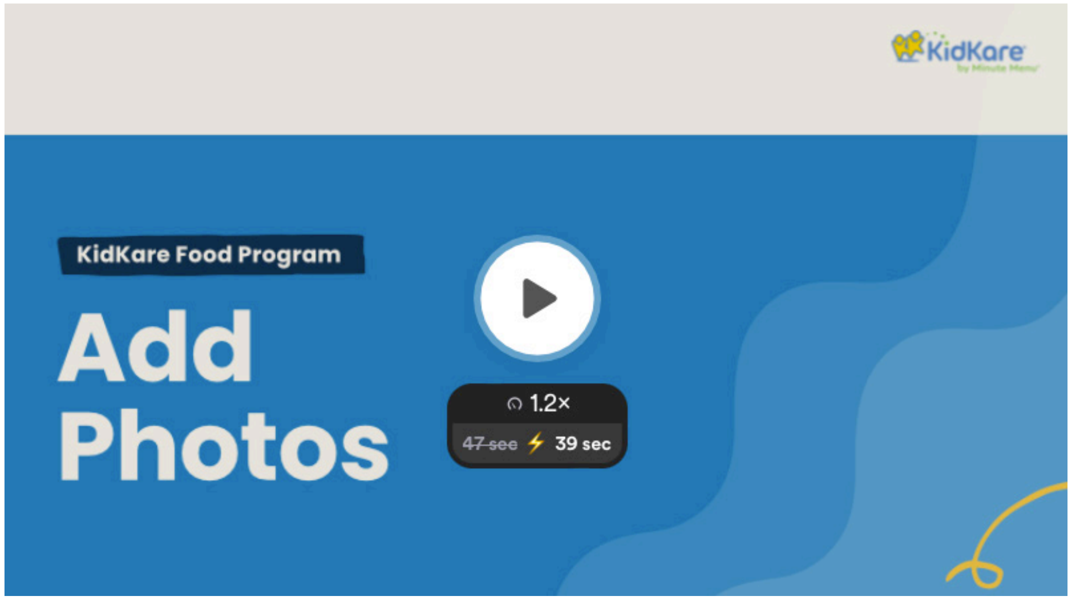


Or ***Enroll Participants Manually***

Add
Photos

Add child photos for an easy way to quickly locate a child.

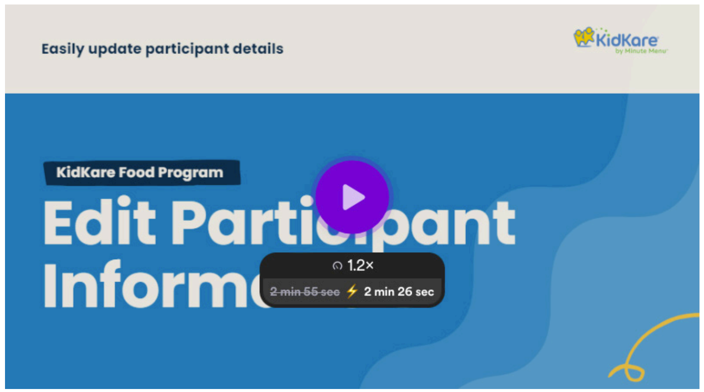
- From the menu to the left, click Children.
- Click  .
- Click Choose.
- Specify whether to take a photo or to select a photo you already have.
- Click  to upload the photo.



Edit Participant Details

To edit participant details:

- From the menu to the left, click ***Children***. A list of participants displays.
- Click a name to view participant details.
- Click ***Edit*** in the section or tab to change. You can update the following:
    - Participant Details
    - Schedule
    - Contacts
    - Infant (Infants Only)
    - CACFP
    - Forms
    - School
    - Allergies/Conditions
    - Demographics
- Enter information over the existing information, and click the sliders to enable/disable certain settings.
- When finished editing a section/tab, click ***Save.***
- Click « or » to navigate to a new participant profile, if needed.



Manage Allergies & Conditions

Indicate any known allergies or conditions in the Allergies/Conditions tab on the View Participant page. This is especially important if the participant requires any substitutions at meal time.

- From the menu to the left, click ***Participants.*** A list of participants displays.
- Click a name.
- Click the ***Allergies/Conditions*** tab at the bottom of the window.
- Click ***Edit.***
- Click next to ***Special Diet*** if the participant has a special diet. If you set this to ***Yes:***
  - The Milk Allergy option displays. Click to indicate that the participant has a milk allergy and does not drink Whole or 1%/Skim milk. You must have a doctor's statement on file. Two New fields will appear.
    - Select who provides the alternative milk option for this participant.
      - Select ***Substitute milk*** if this participant drinks substitute milk purchased and provided by the center.
      - Select ***Parent Provided*** if the parent or guardian provides the milk substitute. This is the option you will select if participants are restricted to water as well.
    - Select the ***Effective Date*** for this allergy. What day did you start serving substitute milk or parent provided milk to this participant instead of Whole or 1%/Skim?
  - The ***Diet Statement on File*** option displays. Click to indicate that you have a diet statement on file. Then, click the Expiration box and select the date the statement expires.
  - The ***Special Diet Notes*** box displays. Click this box and enter any notes about the participant's special diet.

- Click next to ***Special Needs*** if the participant has special needs. If you set this to yes, the Statement on File option displays. Click to indicate that you have a doctor's statement on file.
- Click ***Add Condition*** to list allergies and/or medical conditions.
    - Click the drop-down menu and select ***Allergy or Medical Condition.***
    - Click the corresponding text box and enter a description of the allergy/description.
    - Click ***Add Condition*** to add another line. Click next to a line to remove it.
- Click ***Save.***

Note: To learn more about milk allergies and how to manage substitute milk and parent provided totals, see the Milk Audit section. Any participant marked with a Milk Allergy, the milk served to them will be tracked as substitute milk.

Withdraw Participants

When a participant leaves your care, withdraw them. You can re-enroll them at any time.

- From the menu to the left, click Children. A list of participants displays.
- Click Filters in the top-right corner and ensure you are viewing Active participants.
- Click the participant to withdraw.
- On the View Participant page, click Withdraw.
- Set the withdrawal date. This defaults to today's date.
- Click Withdraw.

Record Attendance & Meal Counts

Record Attendance & Meal Counts

Video Link: [***Attendance & Meal Counts***]()

- From the menu to the left, click ***Menus/Attendance.***
- Click ***Attendance/Meal*** Counts.
- 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

Note: You may be prompted to confirm if a participant you mark present is out of school. If the child is out of school, click OK.

- Note: You may be prompted to confirm if a participant you mark present is out of school. If the child is out of school, ***click OK.***

- Click  to ***record a meal count.*** A participant must be marked in attendance before you can access this option. If individual infant menu reporting is enabled, the Infant Menu pop-up opens.

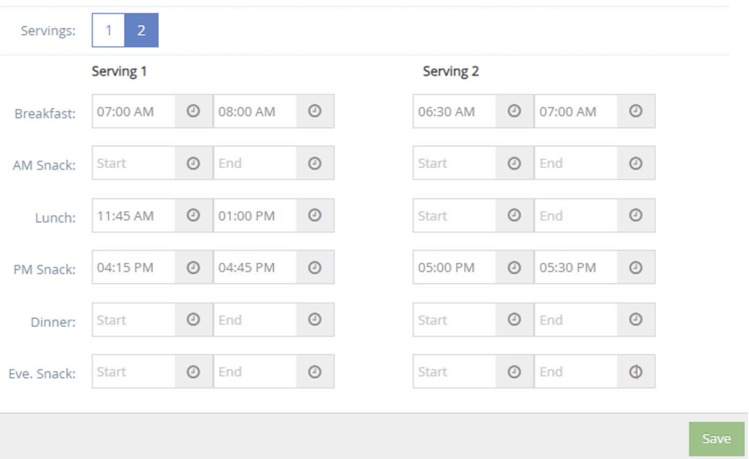
- Note that participants with special diets or allergies noted on their record display with a red outline around their photo.

- Click ***Save.***
- The Certification Statement modal displays. Click ***Acknowledge & Save*** to save attendance and meal counts.

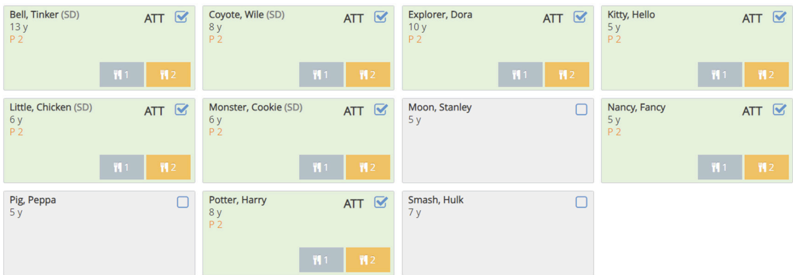
Second Shift
Meal Service

If you are approved to serve two shifts of one or more meals, you will want to add the second serving times to your Site Details to ensure your account is setup correctly.

- From the menu to the left, click **Administration**.
- Then click on **Site Details**
- Click Edit under the **CACFP Meals** section.
- Change **Servings** from "1" to "2"
    - Serving 1 is for regular meals
    - Serving 2 is for before school breakfast and after school snacks
- Enter the starting and ending times for your second servings



- Click **Save.**
- Once **Site Details** have been updated, second servings can be marked in the Attendance & **Meal Counts** screen.
    - Instead of seeing the symbol, you will see 1 2
    - All regular meals will be marked using the 1 for serving 1.
    - All before school breakfasts and after school snacks will be marked using the 2 for serving 2.

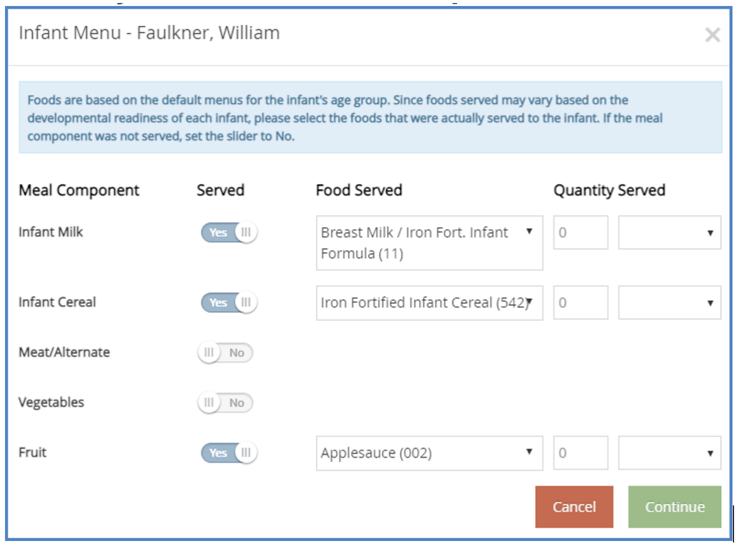


Video Link: [*Serving 2 Setup in KidKare*]

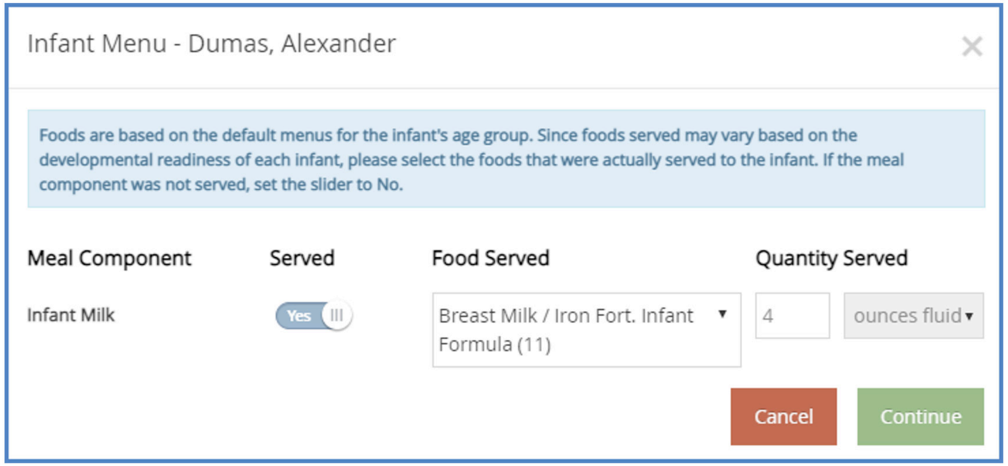
Recording
Meals for Infants

Note: : In order for this feature to be turned on, you will need to go to your Site Settings and toggle Do you want to require center staff to record infants meals by infant? to Yes.

- From the menu to the left, click ***Menus/Attendance.***
- Click ***Attendance/Meal Counts.***
- Make sure the correct date, classroom, and meal are selected at the top of the page.
- Click  to record a meal count for an infant. The infant must be marked in attendance before you can access this option. The Infant Menu pop-up opens.



- 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 ***Step 6.***
    - Click 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.



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

Video Link: [***Feeding Infants in KidKare***]

Manage Food List

Manage
Food Categories

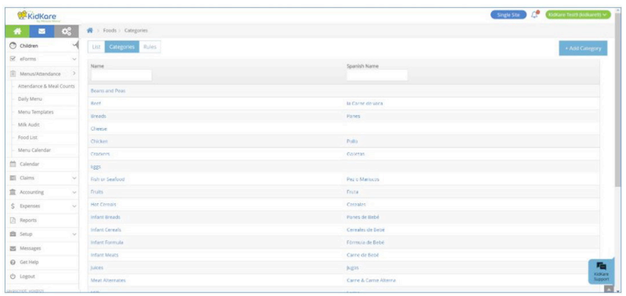
Add Food Categories

Set up food categories on the Food Categories page. You can then assign foods you create/edit on the Food List page to these categories.

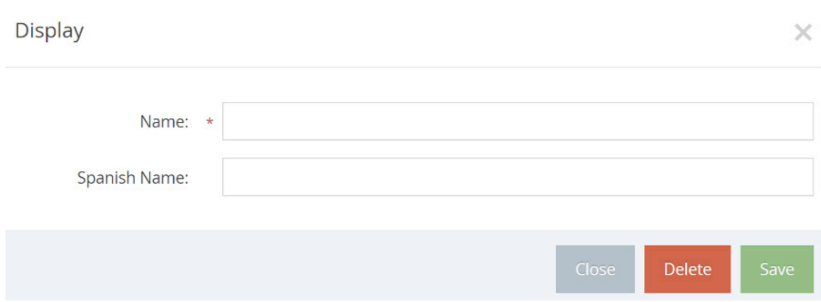
Required Permissions: You must be assigned to the Director or Administrator role to access the Food Categories page.

To add a food category:

- From the menu to the left, click **Menus/Attendance.**
- Click **Food List.** The Food List page opens.
- Click the **Food Categories tab.** The Food Categories page opens.



- Click **Add a Category.** A pop-up opens.

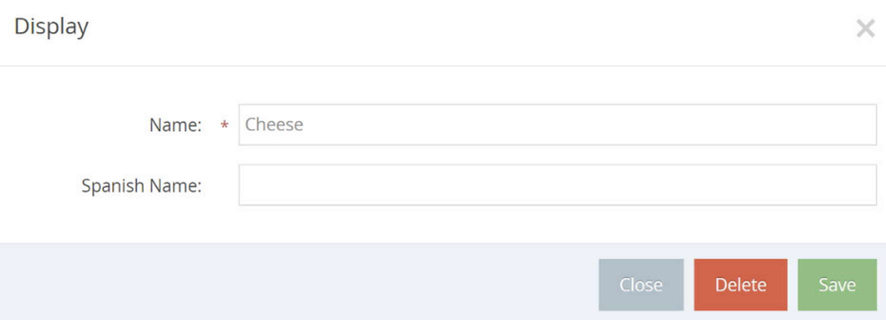


- Click the **Name** box and enter a name for this category. This box is required.
- Click the **Spanish Name** box and enter the Spanish name for this category. This box is optional.
- Click **Save.**

Edit Food Categories

To edit a food category:

- On the Food Categories page, click the category name to change. A pop-up opens.

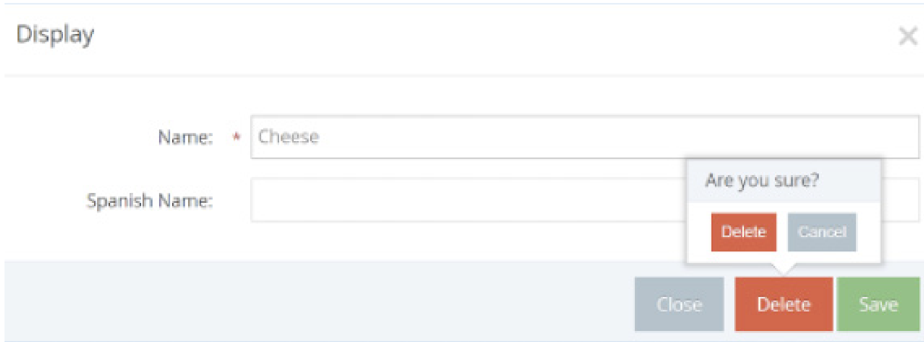


- Click each box and enter new information over the existing information.
- When finished, click **Save.**

Delete Food Categories

To delete a food category:

- On the Food Categories page, click the category to remove. A pop-up opens.
- Click **Delete.**
- At the Are You Sure prompt, click **Delete.**



Note: You must remove all foods from a category before you can delete it.

Add & Edit Foods

The Food List page allows you to input certain approved foods for your center. This gives you control over what foods your staff can serve. The Food List page displays all of your foods and their settings in a table.

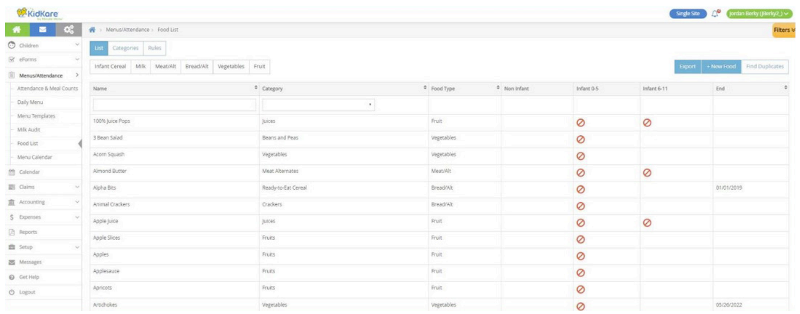
You can see at a glance what foods are allowed (blank), disallowed ( ), or warned( ) for each age group, as well as any start or end dates. The food name, number, category, and type also display.

Delete Food Categories

Required Permissions: You must be assigned to the **Director or Administrator** role to access the Food List page.

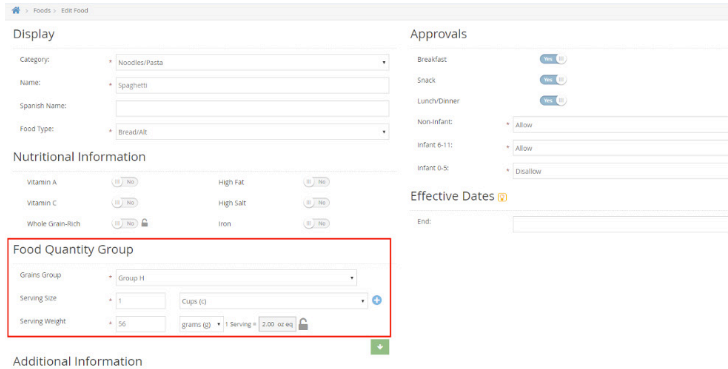
To add foods:

- From the menu to the left, click **Menus/Attendance.**
- Click Food List. The Food List page opens.



- Click **New Food.**
- Select the **Category** to which this food belongs.
- Enter a name and a Spanish name (optional) for this food.

- Select the Food Type.
  - If you select Vegetables or Fruit in the Food Type drop-down menu, the Juice flag displays. If this food item is a vegetable or fruit juice, click the **slider** to set the Juice flag to Yes.
- In the **Nutritional Information** section, click the slider next to each flag that applies to this item.
- In the **Food Quantity Group** section:
  - If you are entering a Bread/Alt or Infant Cereal:
    - Click the Grains Group drop-down menu and select the Exhibit A grains group to which this item belongs. You can view Exhibit A *here*. Note that if you are updating an Infant Cereal, this drop-down menu is locked to Group I (ready-to-eat cereals).
    - Click the Serving Size box and enter the standard serving size for this item. For example, if you are updating Brand B bread and the nutrition label says that one serving is one slice, you would type 1 in this box.
    - Click the corresponding drop-down menu and select the serving unit. Following our example, you would select slice. You can also click and enter a custom unit.
    - Click the Serving Weight box and enter the serving weight from the nutrition label in grams or ounces. Then, click the corresponding drop-down menu and select grams (g) or ounces (oz). In our example, a serving of Bread A weighs 45g, so we enter 45 and select grams (g). Once you enter this information, the 1 **Serving =** box displays and shows the amount of ounce equivalents in one serving of this item.



    - Click to lock this calculation and prevent staff from overriding it on the Daily Menu page, if needed. Click to lock it again.
    - **If you are entering any other component:** Click each drop-down menu and specify how the food should be measured for Non-Infants and Infants. You can also click to view measurements by age group. Your selection in this box affects the unit of measure used on the Menu Production Record when calculating the quantities needed. For more information about the Menu Production Record, see Menu Production Record.

- In the **Approvals** section, specify the meals and children for which this food is approved.
- In the **Effective Dates** section, set an End Date for this food, if needed. If you enter an end date, this food will not be available once the end date is reached.
- When finished, click **Save.**

Edit Foods

To edit foods:

- On the Food List page, click the row for the food to change. The Edit Food page opens.
- Update the information, as needed.
- When finished, click **Save.**
- Use the drop-down menu at the top of the page to select a new food to edit, or click Cancel to return to the Food List page.

Remove Foods

While you cannot delete foods from your food lists, you can set end dates for foods that should no longer be available for meals. Once a food reaches the End date to which it is assigned, that food is no longer available when setting up meals. This is also useful for managing duplicate foods on your food list.

Required Permissions: You must be assigned to the Director or Administrator role to access the Food List page.

- From the menu to the left, click **Menus/Attendance.**
- Click **Food List.** The Food List page opens.
- Click the row for the food to change. The Edit Food page opens.
- In the **Effective Dates** section, click the End box and enter an end date for this food. You can also click to select the date from a calendar. Once this date is reached, the food is no longer available for meals.

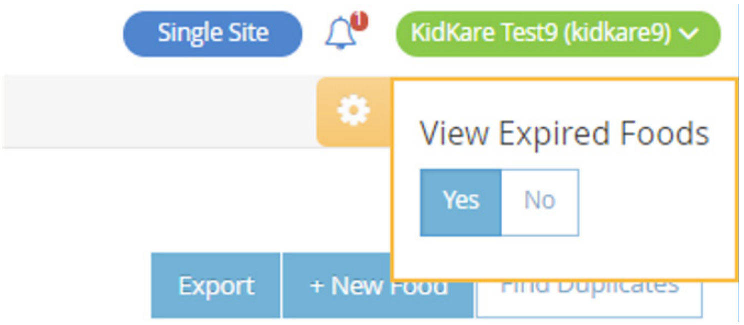
- When finished, click **Save.**
- Use the drop-down menu at the top of the page to select a new food to remove, or click **Cancel** to return to the Food List page.

Export Your
Food List

You can export your food list to an Excel® spreadsheet (.XLSX).

Required Permissions: You must be assigned to the Director or Administrator role to access the Food List page.

- From the menu to the left, click **Menus/Attendance.**
- Click **Food List.** The Food List page opens.
- Select the **Food Types** to include in the export at the top of the page.
- Click in the top-right corner to specify whether to view expired foods and include them in the exported list.



- Click **Export.**

Depending on your browser settings, the file downloads automatically, or you are prompted to select the location in which to save the file.

Manage
Food Rules

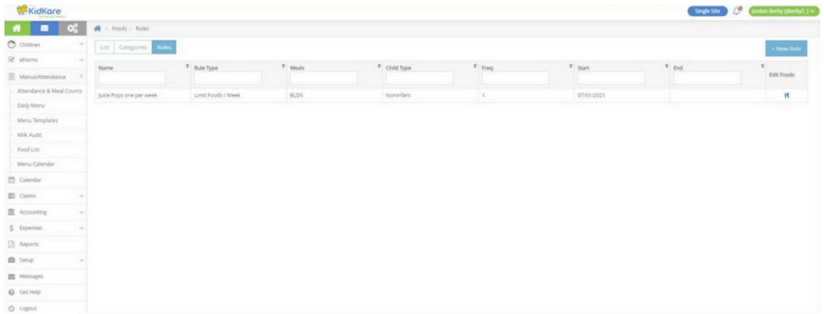
Food rules allow you to limit the number of times a food can be served during a certain time period (frequency rules) or the foods that can be served together (combination rules). This gives you greater control over what your staff is serving each day. Click a link below to jump to a specific food rule type.

Add Food Frequency Rules

Setting food frequency rules allows you to limit the number of times a food can be served during a certain time period. For example, you can limit pudding to once a week.

Required Permissions: You must be assigned to the Director or Administrator role to create food rules.

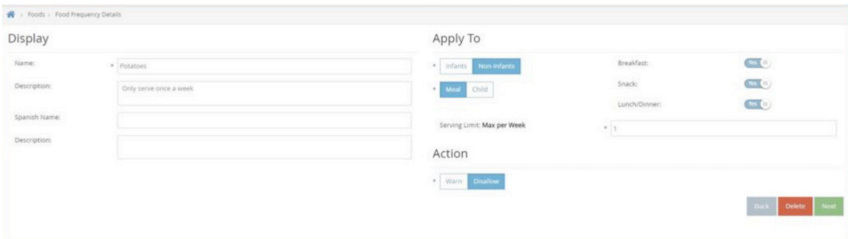
- From the menu to the left, click **Menus/Attendance.**
- Click **Food List.** The Food List page opens.
- Click the **Food Rules** tab. The Food Rules page opens.



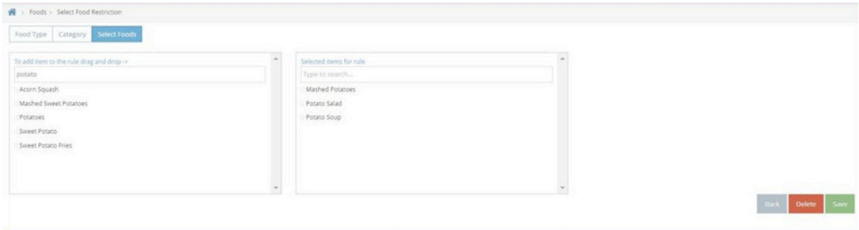
- Click **New Rule** and choose from the following:
    - Limit Foods/Day
    - Limit Foods/Week
    - Limit Foods/Month
- In the **Display** section, enter a rule name, description, Spanish name, and Spanish description.
- In the **Apply To** section:
    - Select Infants or Non-Infants.
    - Select Meal or Participant.

> ***Note:*** According to your display settings, the Participant option may be something different, such as Child. For more information, see ***Set Display Settings.***

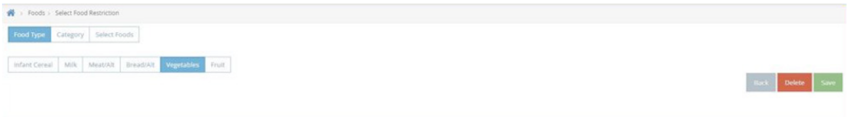
-
    - Select the meal(s) to which this rule applies.
    - Click the Serving Limit box and enter the maximum serving limit per day/week/month.
- In the **Action** section, select **Warn** or **Disallow.**



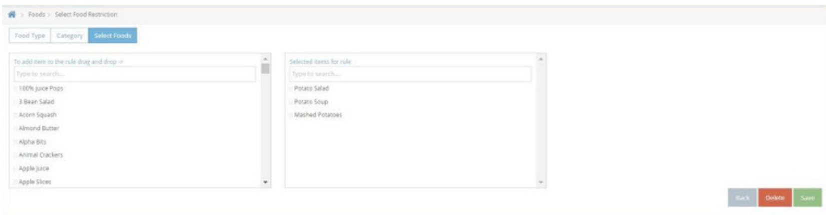
- **Click Next**. The Select Food Restriction page opens.



- Select a food type, category, or food to restrict.
    - To restrict a food type:
        - Click Food Type.
        - Select the type.



-
    - To restrict a food category:
    - Select Category.
    - Click the category in the first box and drag and drop it into the Selected Items for Rule box. You can click the Type to Search box and enter the category name to filter the categories that display.



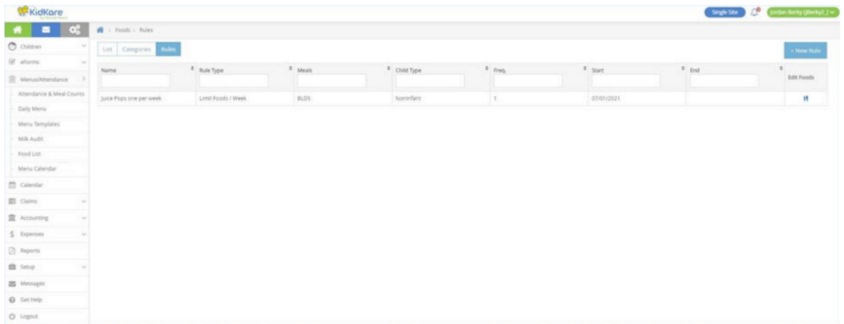
- 10. Click **Save.**

Add Food Combination Rules

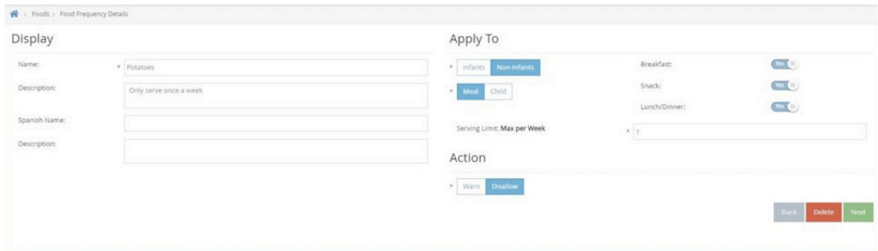
Setting food combination rules allows you to automatically warn or disallow certain food combinations. For example, you may set a combination of mashed potatoes and French fries to be automatically disallowed.

> ***Required Permissions:*** You must be assigned to the Director or Administrator role to create food rules.

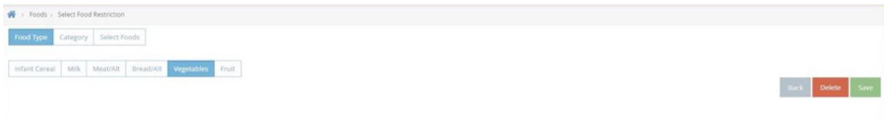
- From the menu to the left, click **Menus/Attendance.**
- Click **Food List.** The Food List page opens.
- Click the Food Rules tab. The Food Rules page opens.



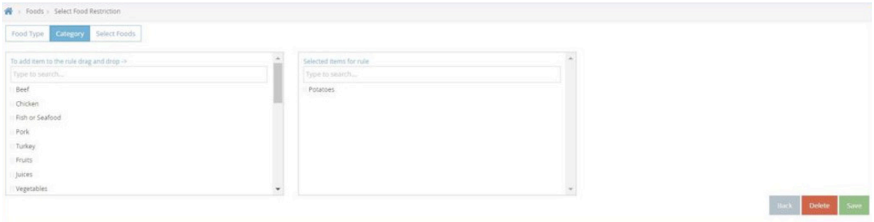
- **Click New Rule** and choose from the following:
    - Any 2 Foods: The rule applies to two specific foods served together, such as french fries and mashed potatoes.
    - All Foods: The rule applies to all foods assigned to the rule, such as combination meals.
- In the **Display** section, enter a rule name, description, Spanish name, and Spanish description.
- In the **Effective Dates** section, set a start and end date, if needed.
- In the **Apply To** section, select the meal(s) to which this rule applies.
- In the **Action** section, select Warn or Disallow.



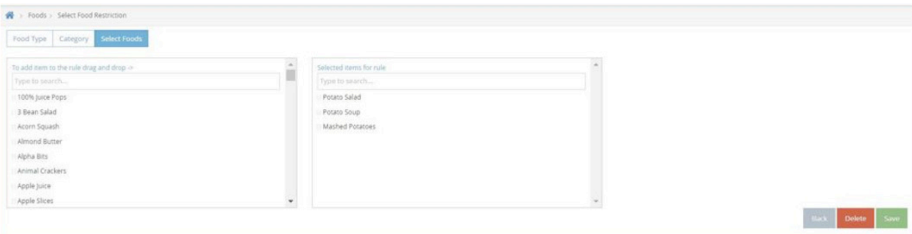
- **Click Next.** The Select Food Restriction page opens.
- Select a food type, category, or food to restrict.
    - To restrict a food type:
        - Click Food Type.
        - Select the type.



- To restrict a food category:
  - Select Category.
  - Click the category in the first box and drag and drop it into the Selected Items for Rule box. You can click the Type to Search box and enter the category name to filter the categories that display.



- To restrict a specific food:
  - Click Select Foods.
  - Click the food in the first box and drag and drop it into the Selected Items for Rule box. You can click the Type to Search box and enter the food name to filter the foods that display.



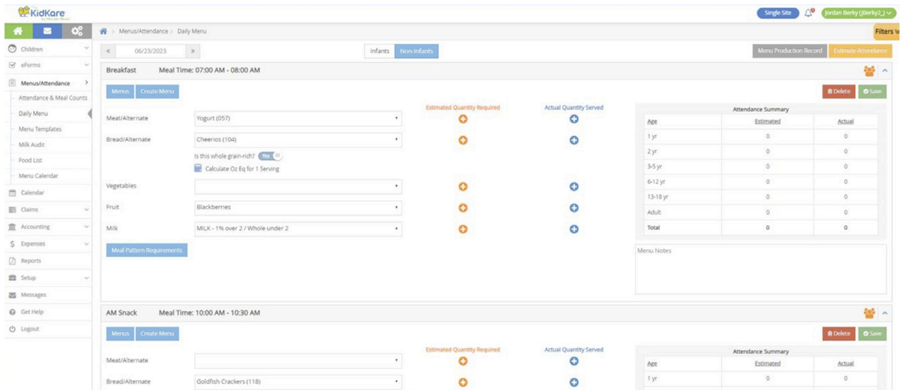
- Click **Save.**

Plan & Record Menus

Daily Menu

The Daily Menu screen is where you will go to build the menu components for each meal you serve. Keep in mind that your state team manages the food components that are available on this screen. You will see components listed out as they are in the Food Buying Guide.

- From the menu to the left, click ***Menus/Attendance.***
- Click ***Daily Menu.***
- Click on the ***Non-Infants*** or ***Infants*** tab at the top depending on which menu you are building.
- Click to expand a meal. Click to collapse it again.
- Select the appropriate meal components. You can also click ***Menu*** to select a saved menu template.

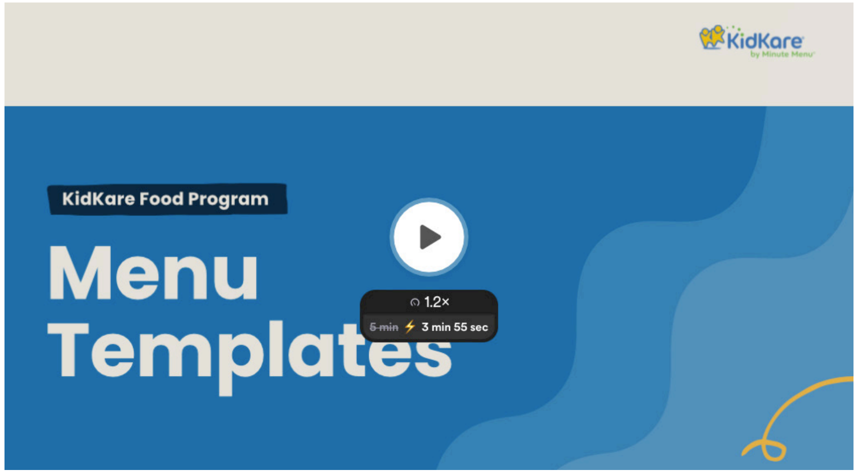


- A message displays when the meal pattern requirements for the meal type have not been fulfilled by the menu. Once the meal pattern guidance has been satisfied, and the required number/types of components are associated with the meal, the error no longer displays. You can click ***Create Menu*** to save this meal as a menu template.
- Click the ***Menu Notes*** box and enter any notes about this meal, if needed.
- Click ***Save.***

Video Link: ***Daily Menu Video***

Menu Templates

You can use Menu Templates to create your full 4-week cycle menu 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.



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.***

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.

Chicken Jambalaya w/ Sausage

		Actual Quantity Served
Meat/Alternate	Chicken and Sausage	
Bread/Alternate	Brown Rice	
	Is this whole grain-rich? Yes Calculate Oz Eq for 1 Serving	
Vegetables	Tomato Sauce	
Fruit/Vegetable	Green Beans (186)	
Milk	MILK - 1% over 2 / Whole under 2	

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**

Chicken and Sausage Jambalaya served with green beans and garlic bread

Lasagna

		Actual Quantity Served
Meat/Alternate	Ground Beef (003)	
Bread/Alternate	Lasagna Noodles	
	Is this whole grain-rich? No Calculate Oz Eq for 1 Serving	
Vegetables	Tomato Sauce	
Fruit/Vegetable	Tossed Salad (182)	
Milk	MILK - 1% over 2 / Whole under 2	

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**

Beef and cheese lasagna served with lettuce and tomato salad and ranch

Egg & Cheese Breakfast Burrito

		Actual Quantity Served
Meat/Alternate	Egg & Cheese (048)	
Bread/Alternate	Tortilla - Whole Grain	
	Is this whole grain-rich? Yes Calculate Oz Eq for 1 Serving	
Vegetables		
Fruit	Strawberries (035)	
Milk	MILK - 1% over 2 / Whole under 2	

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

served with salsa

CN Label Chicken Tenders and Fries

		Actual Quantity Served
Meat/Alternate	Chicken Strips/Tenders (502)	
Bread/Alternate	Breading (222)	
	Is this whole grain-rich? No Calculate Oz Eq for 1 Serving	
Vegetables	French Fries	
Fruit/Vegetable	Applesauce (002)	
Milk	MILK - 1% over 2 / Whole under 2	

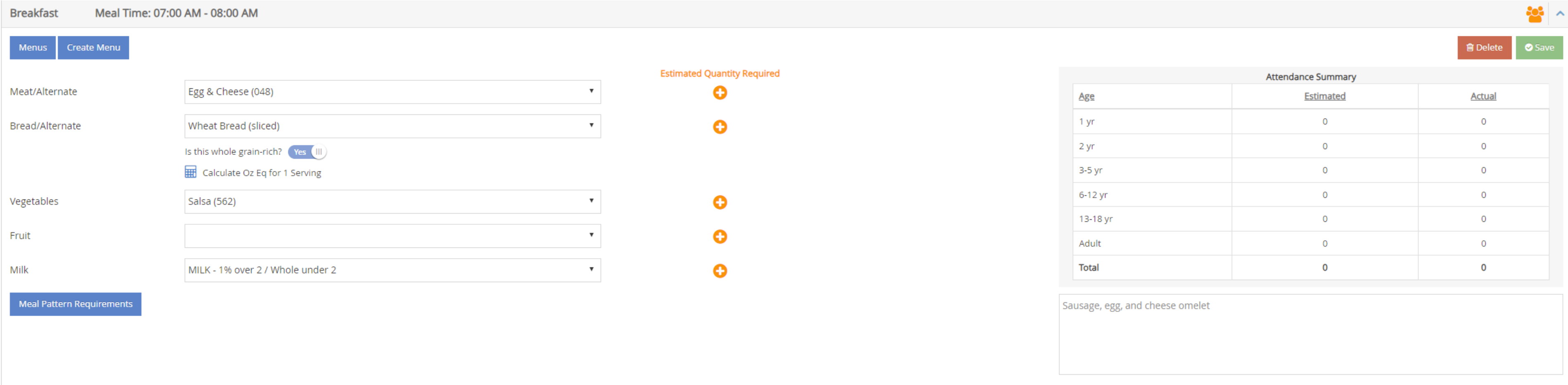
Meal Pattern Requirements

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

Tyson CN156145284

Sausage, Egg, & Cheese Omelet



Breakfast Meal Time: 07:00 AM - 08:00 AM

Menus | Create Menu | Delete | Save

Estimated Quantity Required

Meat/Alternate: Egg & Cheese (048)

Bread/Alternate: Wheat Bread (sliced)

Is this whole grain-rich? Yes

Calculate Oz Eq for 1 Serving

Vegetables: Salsa (562)

Fruit:

Milk: MILK - 1% over 2 / Whole under 2

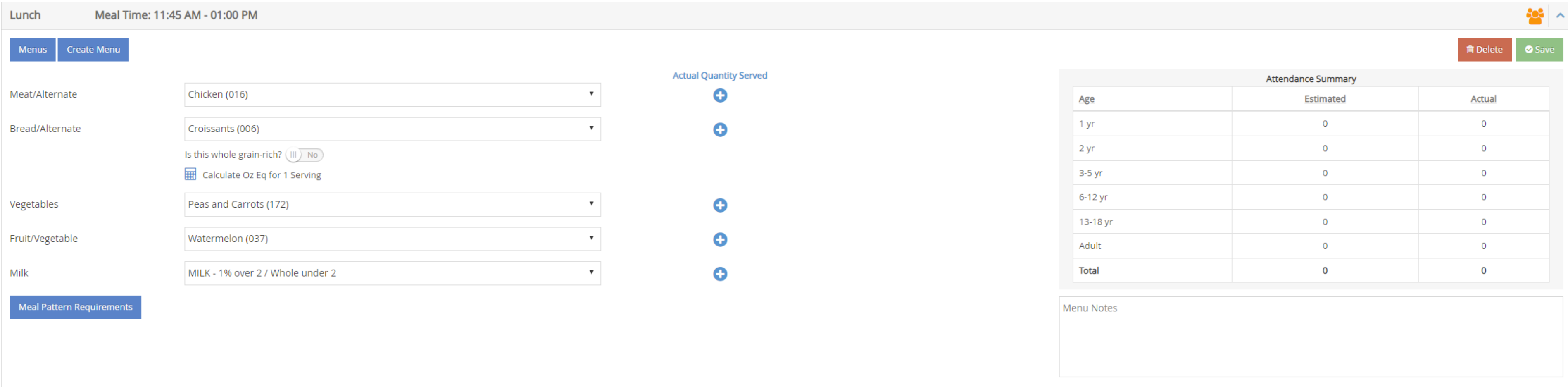
Meal Pattern Requirements

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

Sausage, egg, and cheese omelet

Chicken Pot Pie



Lunch Meal Time: 11:45 AM - 01:00 PM

Menus | Create Menu | Delete | Save

Actual Quantity Served

Meat/Alternate: Chicken (016)

Bread/Alternate: Croissants (006)

Is this whole grain-rich? No

Calculate Oz Eq for 1 Serving

Vegetables: Peas and Carrots (172)

Fruit/Vegetable: Watermelon (037)

Milk: MILK - 1% over 2 / Whole under 2

Meal Pattern Requirements

Attendance Summary

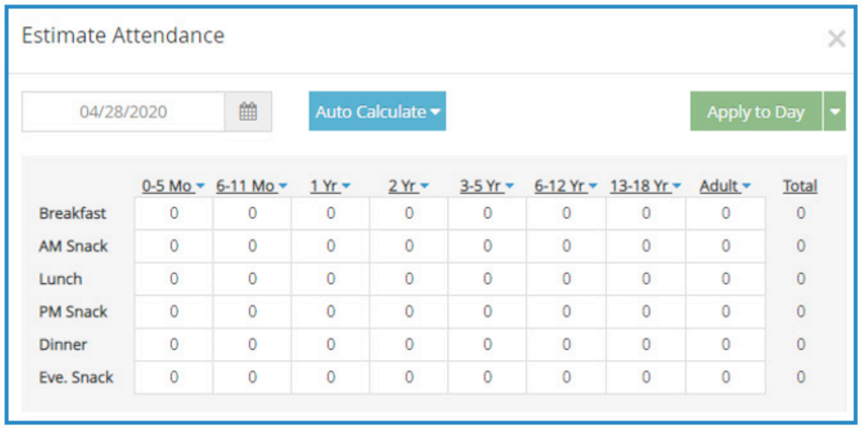
Age	Estimated	Actual
1 yr	0	0
2 yr	0	0
3-5 yr	0	0
6-12 yr	0	0
13-18 yr	0	0
Adult	0	0
Total	0	0

Menu Notes

Estimate Attendance

Estimating attendance is not a required feature in KidKare, but it is a useful feature when it comes to meal prep and food purchases. If you tell the software how many participants you normally have in attendance, it will give you meal prep amounts and a weekly shopping list with all of your food components to help avoid over or under prepping for meals.

- From the menu to the left, click ***Menus/Attendance.*** Then, click Daily Menu.
- Click ***Estimate Attendance.*** The Estimate Attendance pop-up opens.


Estimate Attendance

04/28/2020 Auto Calculate Apply to Day

	0-5 Mo	6-11 Mo	1 Yr	2 Yr	3-5 Yr	6-12 Yr	13-18 Yr	Adult	Total
Breakfast	0	0	0	0	0	0	0	0	0
AM Snack	0	0	0	0	0	0	0	0	0
Lunch	0	0	0	0	0	0	0	0	0
PM Snack	0	0	0	0	0	0	0	0	0
Dinner	0	0	0	0	0	0	0	0	0
Eve. Snack	0	0	0	0	0	0	0	0	0

- Click the ***Date*** box and select the date for which to estimate attendance.
- At this point, you can manually enter estimated attendance, or you can auto-calculate estimated attendance.

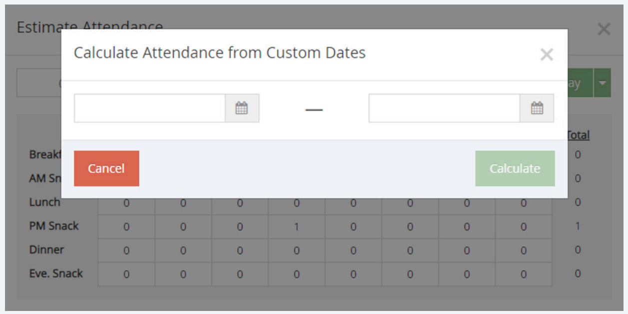
Manually Enter Attendance

- Click each cell and enter the estimated attendance for each meal and age group. ***Press Tab*** to quickly move between cells in a column. Press Enter to move to a new row.

- When you enter attendance for an age group, click at the top of a column to copy attendance.
    - Select ***This Age Group*** to copy estimated attendance from the first row to all rows for the selected age group.
    - Select ***All Age Groups*** to copy estimated attendance from the first row to all rows for all age groups.

Automatically Calculate Attendance

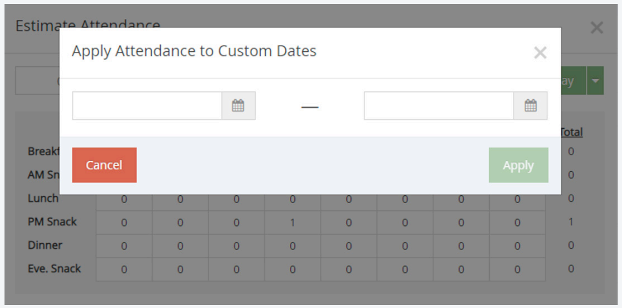
1. Click Auto Calculate and choose from the following:
    - ***From Last [Day of the Week]'s*** Attendance: Copies attendance based on the previous week's attendance for the day of the week you are estimating. For example, if it is currently Wednesday, this says From Last Wednesday's Attendance.
    - ***From Most Recent Attendance:*** Copies attendance based on your center's most recently recorded attendance.
    - ***Custom Date Range:*** Select a date range. Attendance is calculated based on the average number of children per meal by age group over the time period specified. This calculation omits those days where no attendance was recorded.

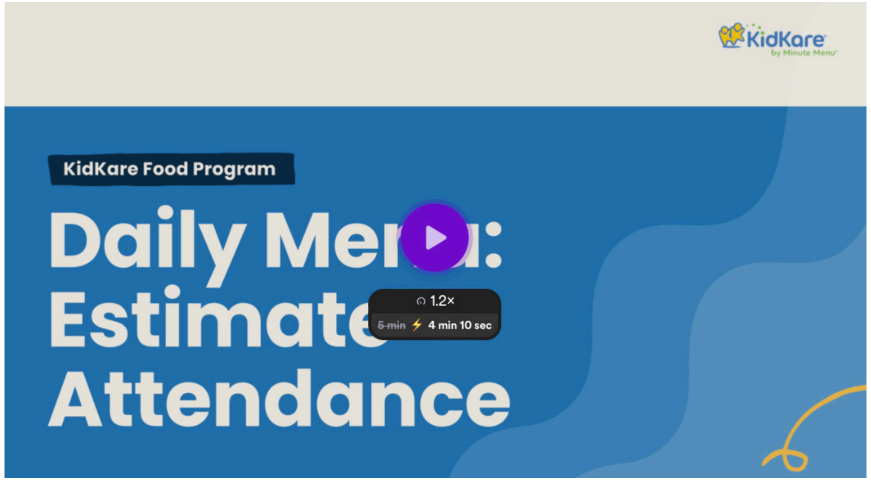


Apply Estimated Attendance

Once you have manually entered or automatically calculated attendance, apply it.

1. Click next to ***Apply To*** and choose from the following:
   - ***Apply to Day:*** Applies the estimated attendance shown to the day you selected.
   - ***Apply to Week:*** Applies the estimated attendance shown to the entire week (on days your center is open) that contains the day you selected (a week is Sunday through Saturday).
   - ***Apply to Month:*** Applies the estimated attendance shown to the entire month (on days your center is open) that contain the date you selected.
   - ***Set Custom Dates:*** Set a custom date range, and click ***Apply.***





Enter Actual **Quantities Served**

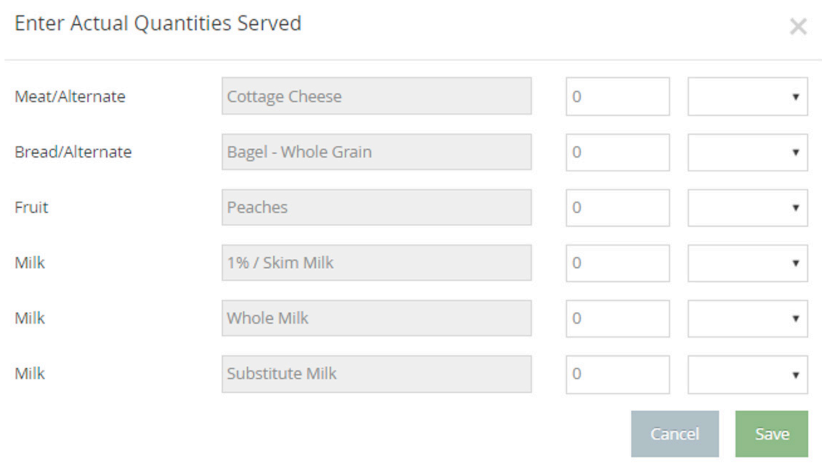
If your state requires that you enter the Actual Quantities Served at each meal service, make sure that setting is turned on. See Site Settings on page 7.

EX: Strawberries – you purchase 15lbs of strawberries and enter that you served 12.5 cups in KidKare.

Since the USDA Meal Pattern shows fruit served in cups, you need to enter the Actual Quantity Served in a similar measurement.

- From the menu to the left, click ***Menus/Attendance.*** Then, click ***Daily Menu***
- Click ***Infants*** or ***Non-Infants.***
- From the menu to the left, click ***Menus/Attendance.*** Then, click ***Daily Menu***
- Click ***Infants*** or ***Non-Infants.***
- Click , or 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.



- 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 (if applicable). If ounce equivalents are enabled, the Bread/Alternate quantities may require you to enter quantities in ounce equivalents, depending on center admin settings or sponsor settings (if you work with a food program sponsor). Do not include parent provided milk into these counts.

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

A Note About Infant Menus and Actual Quantities

If individual infant menu reporting is enabled, the infant menu you record on this page will be used as the default for all infants.

You can adjust individual infant menus when recording attendance and meal counts on the Attendance & Meal Counts page. If you are required to record quantities served, the actual quantity served will be calculated from quantities entered on individual infant menus where the infant was served a default meal component.

For example, suppose you recorded Infant Cereal on the Daily Menu page. This is the default infant menu.

- Charlie is served 2 TBSP of infant cereal.
- Sammy is served 3 TBSP of infant cereal.
- Jamie is served 2 TBSP of infant cereal.

The actual quantities served on the ***Daily Menu page*** will show 7 TBSP, as this is the sum of quantities served to infants using the default menu. However, you can override this amount if adjustments are needed:

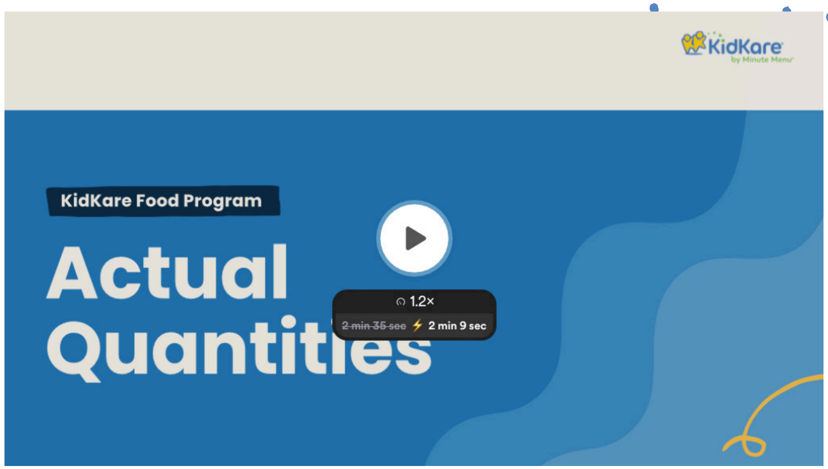
1. Click the amount served. The Quantities Served pop-up opens.
2. Enter the new amount.
3. Click ***Save.***

Note that overriding quantities overrides the default menu, and any adjustments to quantities made on individual infant menus will not affect the quantities recorded on the Daily Menu page. If you make changes on an individual infant menu, you must re-calculate this quantity to return to the sum.

Following the example above, suppose you overridden the actual quantities served for Infant Cereal so it now reads 8 TBSP. You later adjust the amount served to Sammy to 2 TBSP and realize you need to re-calculate the total infant cereal served.

- Return to the ***Daily Menu*** page.
- Click ***Recalculate Quantities.***
- At the ***Are You Sure*** prompt, click ***Recalculate.*** The override is cleared, and actual quantities served are updated to reflect quantities on individual infant menus.

Since we updated Sammy to 2 TBSP and recalculated, the quantities served now reads 6 TBSP.



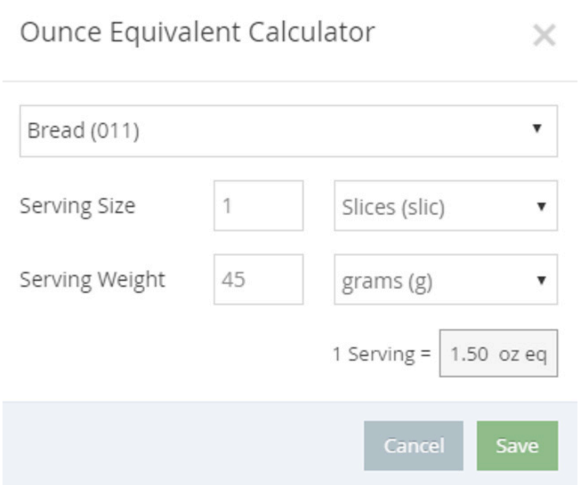
Grain Ounce Equivalents Calculator

- 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.

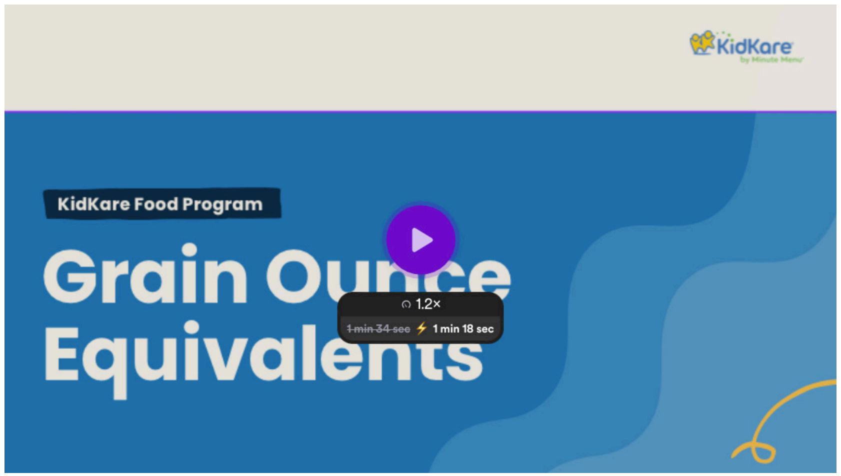
- Click the ***Serving Size*** box and update the common serving size, if needed. Following our example above, we'll leave this set to 1 Slice.
- Click the ***Serving Weight*** box and update the serving weight as stated on the nutritional label for your food. In our example, we need to change this to 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.



Menu Calendar

1. From the menu to the left, click ***Menus/Attendance.***
2. Click Menu Calendar. The Menu Calendar page opens.

Calendar Display

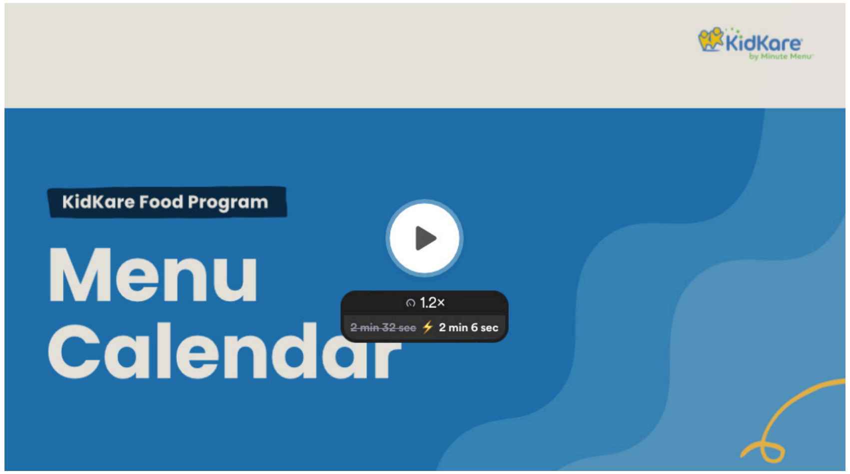
You can update the calendar display to suit your needs.

- 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.
- 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 > move between months. You can also click Today to return to today's date.

Menu Warnings

Menu warnings always display in the following order:

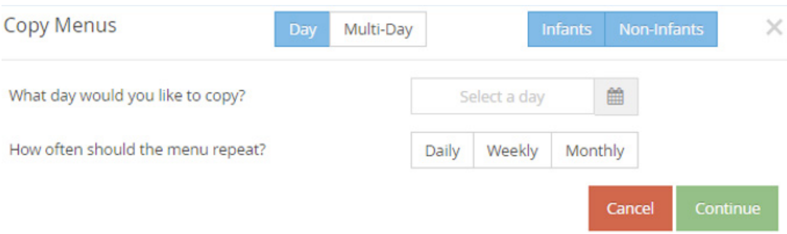
- ***Menu Incomplete:*** This warning displays when a meal is scheduled for the day and does not have all of the required components to be creditable under CACFP regulations. For example, if a lunch is scheduled and does not have all five (5) menu components, this alert displays on the calendar. Also,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



Copy & Paste Menus

Copy & Paste Menus for a Single Day

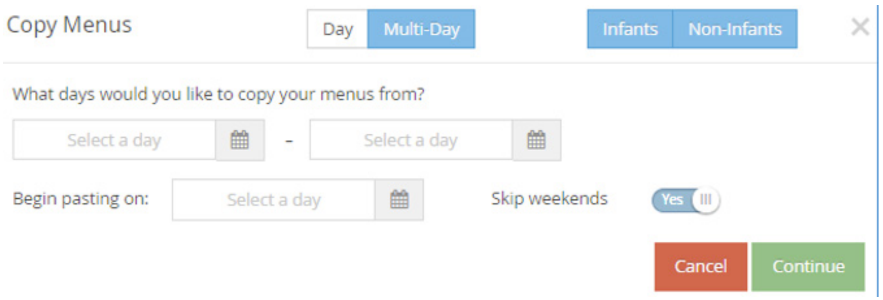
- From the menu to the left, click ***Menus/Attendance.***
- Click ***Menu Calendar.***
- Click ***Copy Menus*** in the top-left corner. The Copy Menus pop-up opens.



- 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.
- 10. Click ***Continue.***
- 11. At the confirmation prompt, review your selections and click ***Copy Menus.***

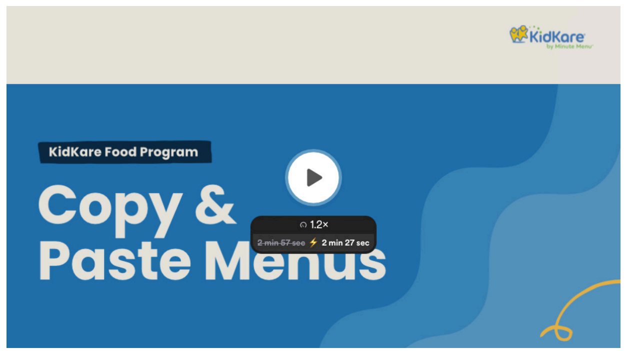
Copy & Paste Menus for Multiple Days

- From the menu to the left, click ***Menus/Attendance.***
- Click ***Menu Calendar.***
- Click ***Copy Menus*** in the top-left corner. 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.***

> ***Note:*** When copying menus for an entire month to a new month, we recommend that you copy from and to the first Monday of each month to the last day of each month. We also recommend that you do not skip weekends, so the menus copy to the correct days.



Food Program Receipts

Manage Vendors

Add Vendors

1. From the menu to the left, click ***Expenses.***
2. Click ***Manage Vendors.*** The Vendors page opens.
3. Click ***Add Vendor.*** The Add Vendor pop-up opens.
4. Click the ***Name*** box and enter the vendor's name. This box is required.
5. Enter the vendor's street address, city, state, zip code, and phone number, if needed.
6. Click ***Save.*** The vendor is added to the table.

Note: You can also access the Add Vendor pop-up from the Add Expense page. When adding an itemized entry or a quick entry, click the Vendor drop-down menu and select Add Vendor. The Add Vendor pop-up opens.

Edit Vendors

1. On the Vendors page, click the name of the vendor to change. the Edit Vendor pop-up opens.
2. Enter new information over the existing information.
3. Click ***Save.***

Delete Vendors

1. On the Vendors page, click the name of the vendor to change. the Edit Vendor pop-up opens.
2. Click ***Delete.***
3. To restore a deleted vendor, click ***Restore*** next to the vendor to restore. If you do not see your deleted vendors listed on the Vendors page, click Filters in the top-right corner and select ***Deleted.***

Video Link: ***Adding Vendors***

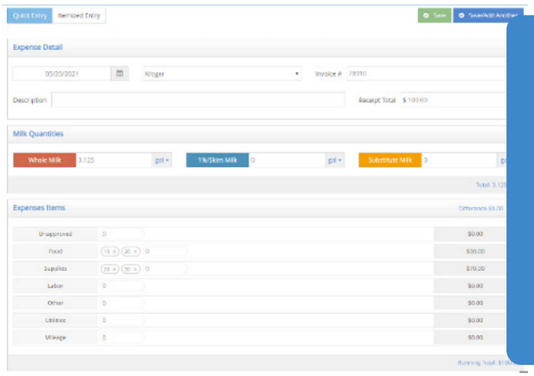
Enter **Expenses**

Quick Entry

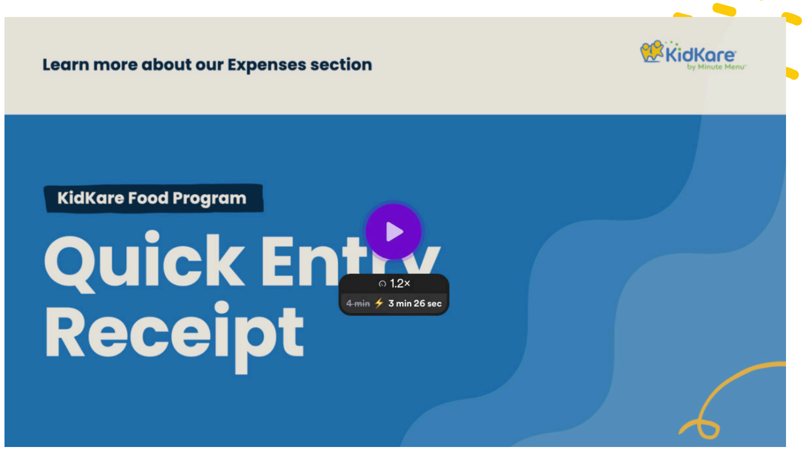
When you use Quick Entry to add expenses, you enter receipt items into category fields by dollar amount. The category fields calculate the total for the category by taking the sum of all numbers entered for the category. The running total is then compared to the receipt total. ***Your state request that you do not use Itemized Receipts at this time. Enter your receipts as Quick Entry only.***

- From the menu to the left, click ***Expenses.***
- Click ***Receipts.*** The Receipts page opens.
- Click ***Add Receipt.*** The Add Receipts page opens.
- Click ***Quick Entry*** at the top of the page.
- Complete the Expense Detail section.
    - The ***Date, Vendor, and Receipt Total*** boxes are required.
    - We recommend you also enter a ***Description*** for reporting purposes.
- 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.



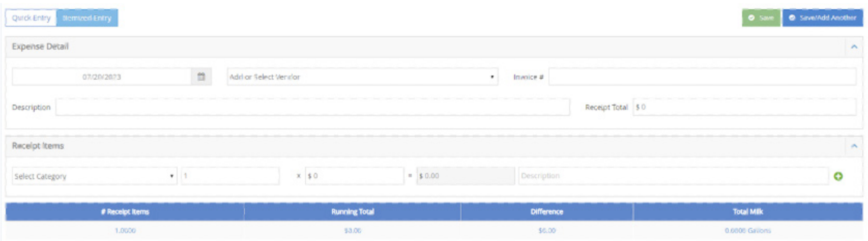
Note: You cannot save your entry if the receipt and running total do not match. The receipt and running total must also both be greater than zero. You must also complete all required fields before saving.



Itemized
Entry

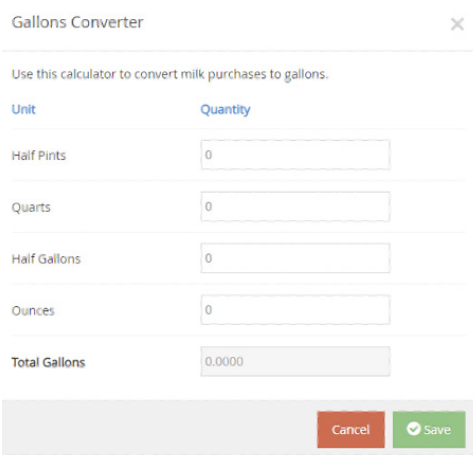
When you use itemized entry to add expenses, you enter each item on the receipt in detail. Itemized entries include the item category, amount, quantity, total cost, and an optional description.

- From the menu to the left, click **Expenses.**
- Click **Receipts.** The Receipts page opens.
- Click **Add Receipt.** The Add Receipts page opens.
- Click **Itemized Entry** at the top of the page.



- Complete the **Expense Detail** section.
  - The Date, Vendor, 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.



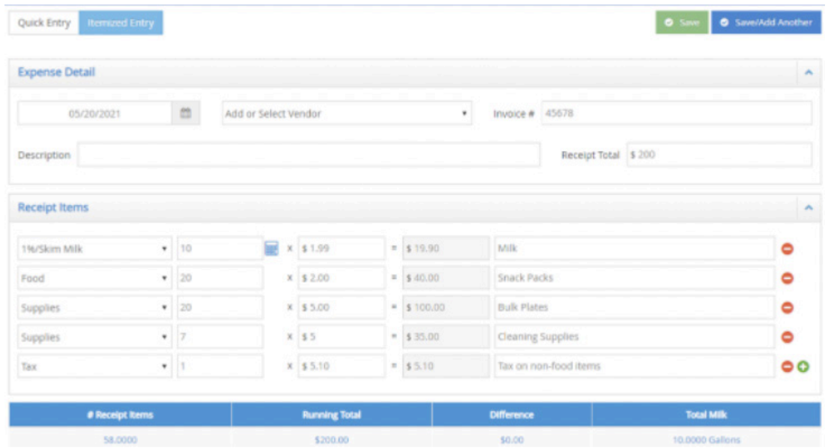
- Enter the number of pints, quarts, half-gallons, and/or ounces of milk you purchased.
- Click **Save.**

◦ 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.

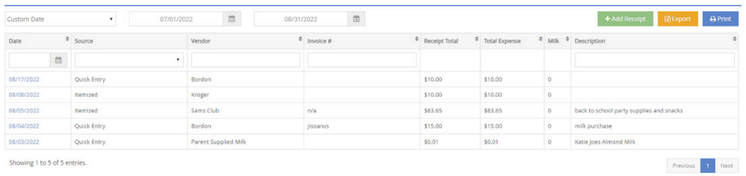
• **Click Save** in the top-right corner. You can also click Save/Add Another to save your entry and begin adding another one.



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.

View
Expenses

- From the menu to the left, click **Expenses.**
- Click **Receipts.** The Receipts page opens.



Date	Source	Vendor	Invoice #	Receipt Total	Total Expense	Milk	Description
08/17/2022	Quick Entry	Bordon		$10.00	$10.00	0	
08/08/2022	Itemized	Kroger		$10.00	$10.00	0	
08/05/2022	Itemized	Sams Club	n/a	$83.65	$83.65	0	back to school party supplies and snacks
08/04/2022	Quick Entry	Bordon	jisoanvs	$15.00	$15.00	0	milk purchase
08/03/2022	Quick Entry	Parent Supplied Milk		$0.01	$0.01	0	Katie Joes Almond Milk

- Click the drop-down menu at the top of the page and choose from the following:
    - Last 30 Days
    - Last 60 Days
    - Last 90 Days
    - Current Month
    - Previous Month
    - Custom Date
- Use the **Date, Source, Vendor, Invoice #, and Description boxes** to further filter the information that displays.
- Click each column to sort information in ascending or descending order.
- Use the **Export or Print** options in the top right as needed.

Milk Audit

Review the Milk Audit

Use the Milk Audit to compare the amount of milk purchased with the amount of milk needed, based on menus and meal counts. It looks at data from other areas of KidKare, such as Attendance/Meal Counts, Menus, and Receipts. Carryovers and write offs are also considered.

Before using this function:

1. Enter receipts
2. Record menus
3. Record meal counts

- From the menu to the left, click ***Claims.***
- Click ***Milk Audit.*** The Milk Audit page opens.
- Click the ***Month*** box and select the claim month to view.
- Select ***Calculated + Actual Served*** to view milk audit information based on calculated and actual served quantities.
- 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. ***Make sure to verify and edit starting balances the first of every month*** to ensure accuracy. Click , enter the new amount, and click . Note that this option may not be available according to your preferences or the preferences your food program sponsor set (if you are a sponsored center).
  - ***Purchased:*** This is the amount of milk purchased, based on receipt date.

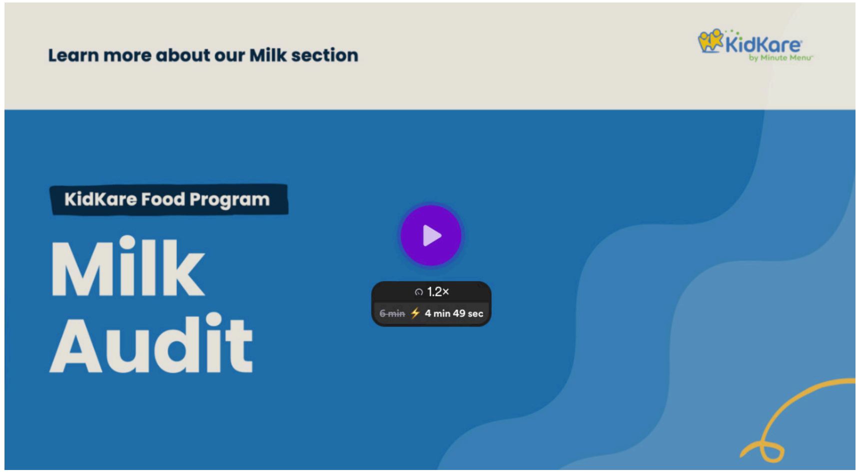
- ***Required:*** This is the amount of milk required based on menus and meal counts.
- ***Written Off:*** This is the amount of milk written off for the month. For example, this number accounts for cases in which the milk was spilled, spoiled, and so on.
- ***End of Month Balance:*** This is the amount 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 4.

Monthly Overview Milk Audit

July 2023 | Calculated | Calculated + Actual Served | Show Daily Calendar | Print

	Whole	1% / Skim	Substitute	Total
Previous Month Carry Over / Starting Balance (Gallons)	0.0000	0.0000	0.0000	0.0000
Purchased (Gallons)	0.0000	0.0000	0.0000	0.0000
Required (Gallons)	0.0000	0.0000	0.0000	0.0000
Written Off (Gallons)	0.0000	0.0000	0.0000	0.0000
Calculated End of Month Balance (Gallons)	0.0000	0.0000	0.0000	0.0000
Actual Served (Gallons)	0.0000	0.0000	0.0000	0.0000
Actual End of Month Balance (Gallons)	0.0000	0.0000	0.0000	0.0000

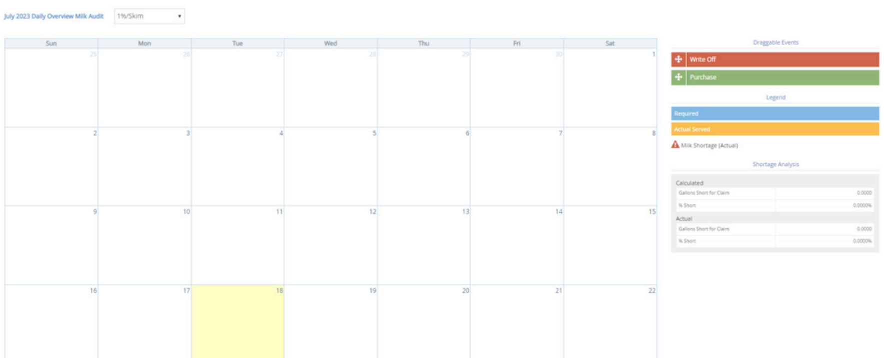
- Click ***Print*** and choose a report to print. You can choose Summary Report or Detailed Report. Both reports download as PDFs.



Use the Milk Audit 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.

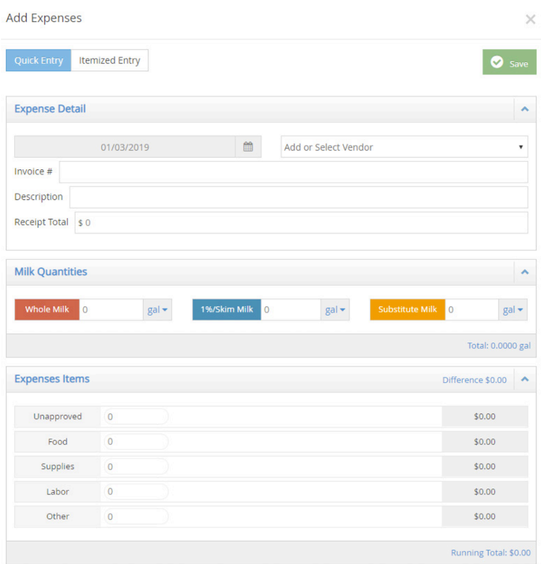


- Click the drop-down menu and select the milk type. You can choose from Whole, 1%/Skim, or ***Substitute.***
- To add a write off:
    - In the ***Draggable Events*** section, click the ***Write Off*** event and drag it to the calendar.
    - Drop it on the day on which to apply it. The Milk Write Off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



  - Select ***Quick Entry.***
  - Enter your milk quantities.
  - Click ***Save.***

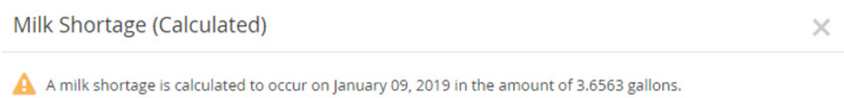
- To edit a Write Off or Purchase from this screen:
  - Click the purchase to edit. A pop-up opens.
  - Enter new information over the existing information. Note that you cannot change the date.
  - Click ***Save.***

- To remove a Write Off or Purchase from this screen:
  - Click the ***X*** in the right corner of the banner in the day your wish to remove.
  - Respond to the confirmation prompt.

Additional Calendar Items

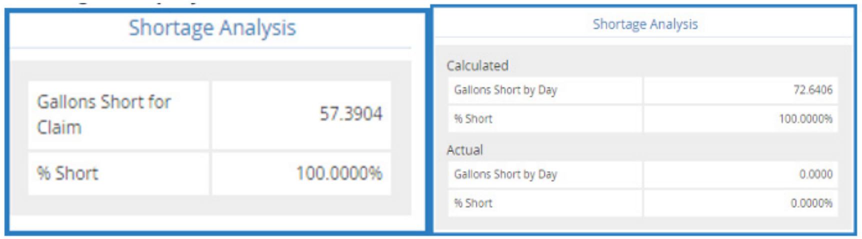
The following items also display on the calendar:

- ***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 (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.

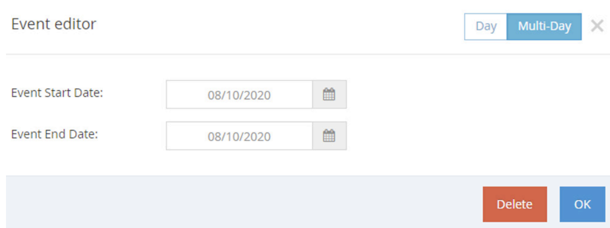


Video Link: ***[Milk Audit Video]***

Manage School Days Out

Add School **Days Out**

- From the menu to the left, click ***Calendar.*** The Calendar page opens.
- To add a school out event for the entire center:
  - Click the ***Center*** tab.
  - From the ***Draggable Events*** section, click ***School Out***, drag it, and drop it onto the calendar. If school is out for more than one day, go to ***Step 5.***
- To add a school out event for an entire classroom:
  - Click the ***Center*** tab.
  - Click the ***Classroom drop-down*** menu and select the classroom for which to add a school out day.
  - From the ***Draggable Events*** section, click School Out, drag it, and drop it onto the calendar. If school is out for more than one day, go to Step 5.
- To add a school out event for individual children:
  - Click the ***Child*** tab.
  - Click the ***Select Child*** drop-down menu and select the child for whom to add an event.
  - From the ***Draggable Events*** section, click ***School Out,*** drag it, and drop it onto the calendar. If this child is out of school for more than one day, go to ***Step 5.***
- Click the event. The Event Editor pop-up opens.
- Click ***Multi-Day.***
- Click the ***Event Start Date*** box and enter the first day school is out.
- Click the ***Event End Date*** box and enter the last day school is out.



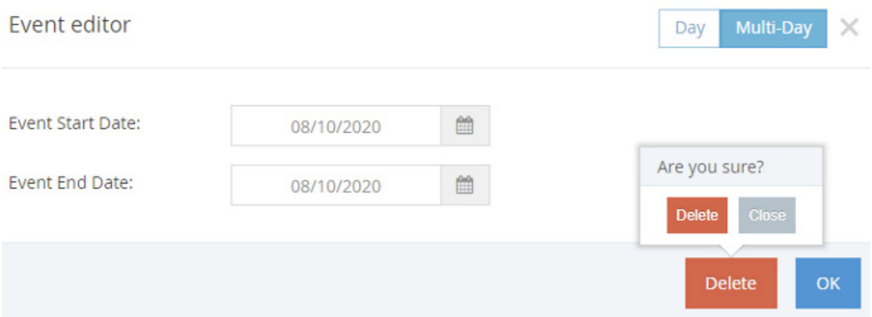
- Click ***OK.***

Video Link: ***School Calendar***

Remove School Out Days

You can remove school out days, as needed. To do so:

- From the menu to the left, click ***Calendar***. The Calendar page opens.
- Click the ***Center*** tab to remove center-wide school out days, or click the Child tab to remove school out days for a specific child. If you select ***Child***, click the ***Select a Child*** drop-down menu and select the child to edit.
- Click the event on the calendar. The Event Editor opens.
- Click ***Delete.***



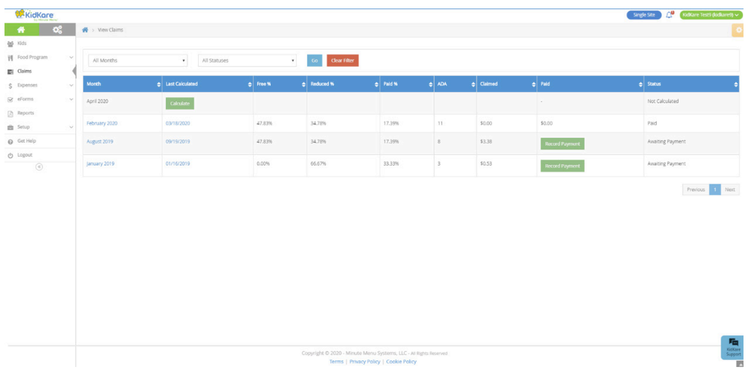
- At the ***Are You Sure*** prompt, click ***Yes.*** The event is removed.

Calculate & Manage Claims

Calculate Claims

The option to calculate a claim displays on the View Claims page for those months in which there are meals/attendance recorded, but you have not yet calculated the claim. This option appears in the Last Calculated column.

- From the menu to the left, click Claims. The View Claims page opens.



- Click Calculate on the row to calculate. The claim is calculated.

If one claim is produced by the calculation, the Claim Detail page opens and displays the claim information. If multiple claims are produced (such as for regular and At-Risk meals), the View Claims page refreshes. click the month or calculated date to open the associated claim.

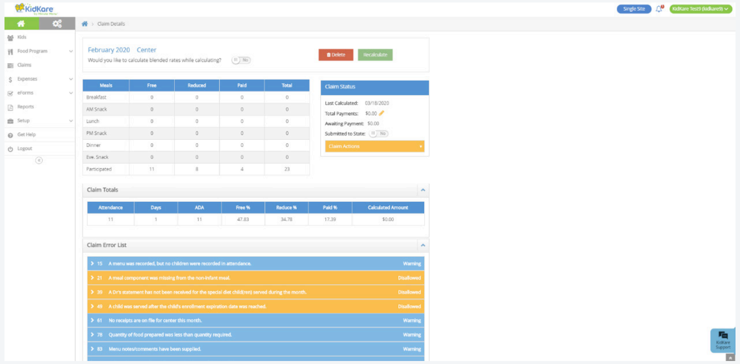
Video Link: ***Calculate Claims***

Recalculate Claims

Before you submit your claim to the state, you can recalculate it to account for any manual changes made after initial claim calculation. For example, you may have corrected an error listed in the Claims Error List and need to calculate the claim again.

You can only re-calculate claims that you have not marked as submitted to the State. If you need to recalculate a claim that you marked as submitted, you must clear the submitted flag before proceeding.

- From the menu to the left, click ***Claims.***
- Click the claim to recalculate. The claim details open.



- Click  next to ***Would You Like to Calculate Blended Rates While Calculating*** to use blended rates while recalculating the claim. This option only displays if you are set to use split meal counts and blended meal rates.
    - This defaults to the selection you made on the previous month's claim.
    - If this is your first claim in KidKare, it defaults to No.
- Click ***Recalculate.*** The claim is recalculated, and the Calculated Date in the Claim Status section is updated. Review the Claim Error List section to ensure that all errors are resolved.

Claim
Error List

The Claim Error List section displays any disallowed and warned meals each time a claim is calculated or recalculated. Each error results in a Warning or Disallowed message. Errors that result in disallowance are deducted from the reimbursement. Warning notifications do not deduct from the reimbursement, but you should still research and correct the cause.

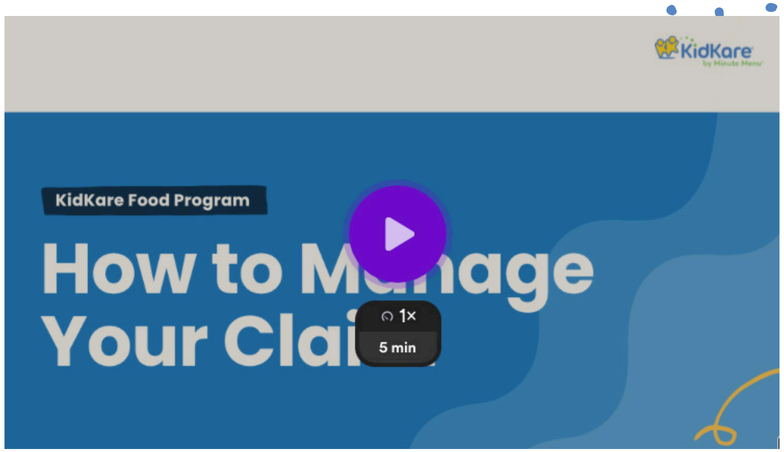
Note: You can filter the Claim Error List to a specific error type. To do so, click the Filters in the top-right corner and select the filter to apply to the Claim Error List. You can show Allow/Warn errors, Disallowed errors, or both errors.

Claim Error List

15	A menu was recorded, but no children were recorded in attendance.	Warning
21	A meal component was missing from the non-infant meal.	Disallowed
39	A Dr's statement has not been received for the special diet child(ren) served during the month.	Disallowed
49	A child was served after the child's enrollment expiration date was reached.	Disallowed
61	No receipts are on file for center this month.	Warning
78	Quantity of food prepared was less than quantity required.	Warning
83	Menu notes/comments have been supplied.	Warning
—	Milk Audit - 1% or Skim Milk: 0.53 gal, Whole Milk: 0.03 gal short	Warning

Claim History

Date Calculated	Claim Amount	Adjustment
03/18/2020	$0.00	No



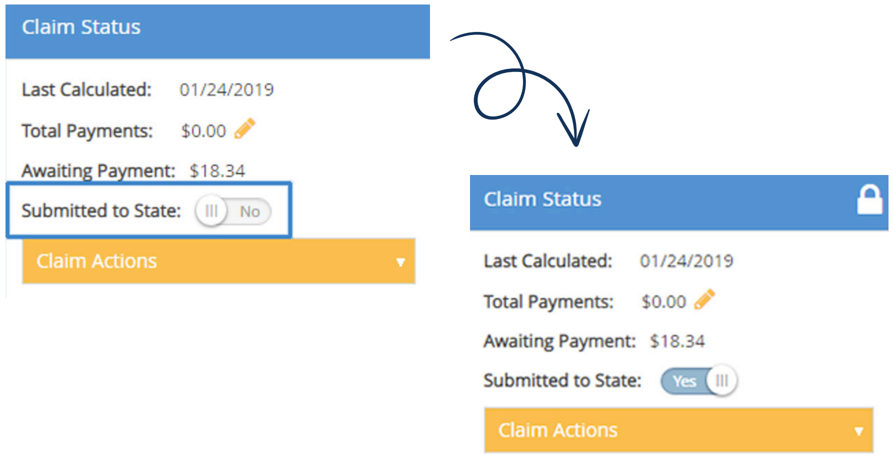
Mark as
Submitted to State

When a claim has just been filed or is about to be filed with your state agency, mark the claim as Submitted in KidKare.

Required Permissions: You must have the Claims permission enabled on your account to view and work with claims. Sponsored centers do not have access to this feature.

- From the menu to the left, click ***Claims.***
- Click the claim to view. The Claim Details page opens.
- In the Status section, click next to ***Have You Submitted Your Claim to the State.***

Note: Once you mark a claim as submitted, the claim records are locked and you cannot make changes to the claim. To unlock the claim for editing again, change the Have You Submitted Your Claim to the State flag back to No.



Video Link: [***Mark Claim as Submitted***]

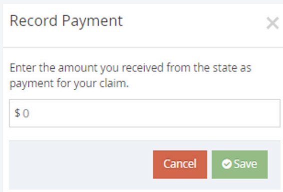
Record Payments from the State

Record payments from the View Claims page or the Claim Details page. If you record a payment for a claim with adjustments, the payment is applied to the original claim first and then to adjustments in date order (oldest to newest) until all money is applied.

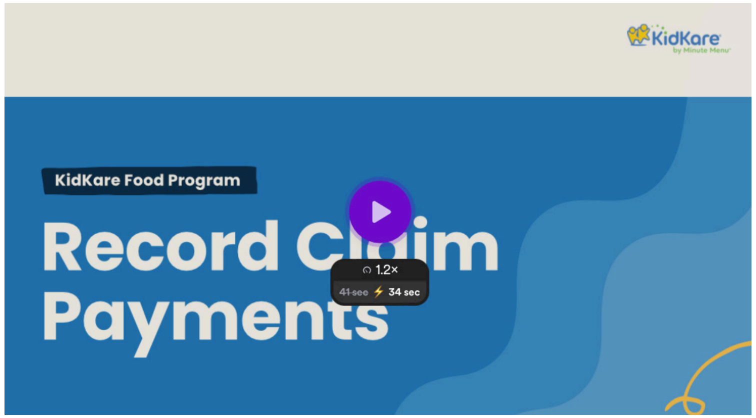
Required Permissions: You must have the Claims permission enabled on your account to view and work with claims. Sponsored centers do not have access to this feature

Recording Payments on the View Claims Page

- From the menu to the left, click ***Claims.***
- In the Paid column, click ***Record Payment.*** The Record Payment pop-up opens.

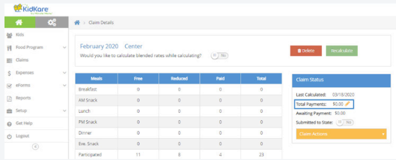


- Click the **$** box and enter the amount you received from the State.
- Click ***Save.***



Recording Payments on the Claim Details Page

- From the menu to the left, click ***Claims.***
- Click the claim for which to record payment. The Claim Details page opens.
- In the Status section, click next to Total Payments. You can also click the Claim Actions drop-down menu and select Enter Payment Amount. The Record Payment pop-up opens.



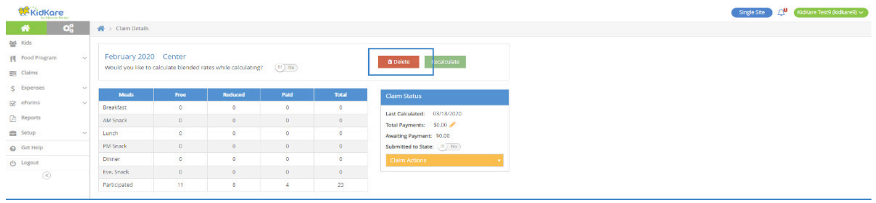
- Click the $ box and enter the amount you received from the State.
- Click ***Save.***

Delete Claims

You can delete claim data for a given month so you can process or re-process your claims.

Required Permissions: You must have the Claims permission enabled on your account to view and work with claims. Sponsored centers do not have access to this feature.

- From the menu to the left, click **Claims.**
- Click the claim to delete. The **Claim Details** page opens.
- Click **Delete.**



- At the **Are You Sure prompt**, click Delete.

Note: If you delete a claim that contains both At-Risk and Regular meals where the claim is represented in two rows on the View Claims page, both claims are deleted. In this case, the Are You Sure prompt reads: Are You Sure You Want to Delete All Claims for the License Type [LICENSE] for the Month? Click Delete to delete both the At-Risk and Regular claim.

View Claim History

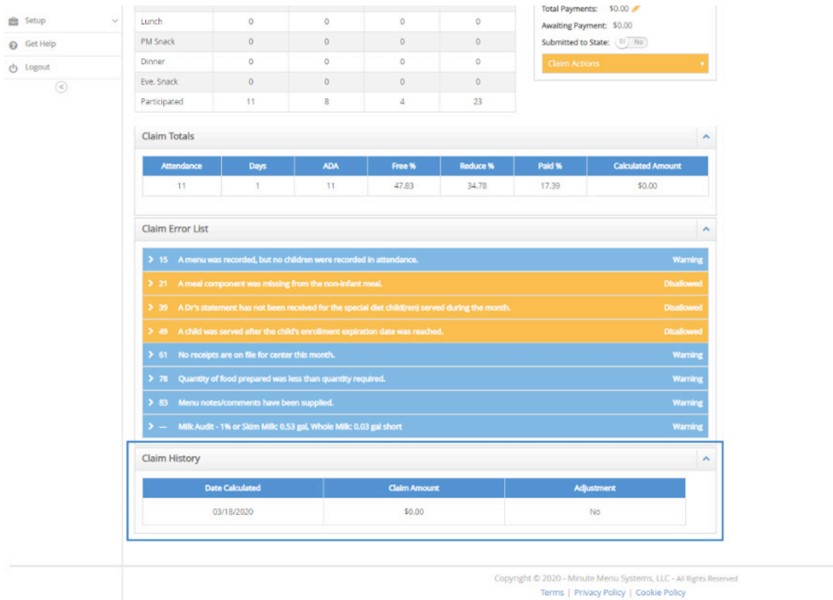
The Claim History section of the Claim Details page displays all claim activity for a selected claim.

***Required Permissions*:** You must have the Claims permission enabled on your account to view and work with claims. Sponsored centers do not have access to this feature.

- From the menu to the left, click **Claims.**
- Click the claim to view. the **Claim Details** page opens.
- The **Claim History** section displays at the bottom of the page. Click ⌄ to expand it, and click ⌃ to collapse it again. The following information displays:
    - Date Calculated: This is the date the claim was calculated/recalculated or the date of the manual adjustment for the associated row. This table is sorted in date range from oldest to newest. The original calculation always displays first.
    - Claim Amount: This is the claim amount when the claim was calculated/recalculated, minus any previously calculated amounts.
        - Original Claim Calculation: This is the calculated amount.

- Recalculated Claims: If there is a difference in the claim value, this is the new calculated amount minus the original calculated amount. This can be a positive or a negative amount.
- Adjusted Claims: This is the impact of the adjustment. This can be a positive or a negative amount.

◦ Adjustment: This indicates whether the row is an adjustment. If this column is set to Yes, you can click ⛔ to remove the adjustment. At the confirmation prompt, click Delete.



Reports

Participant Reports

Participants Not Claimed Report

This report lists active participants 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 participant was claimed for that month.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Participants
    - ***Report Name:*** Participants Not Claimed
    - ***Month:*** Select the month for which to run the report.
- Click ***Run.*** A PDF downloads.

Participant Roster

The Participant Roster lists all participants currently enrolled with your center. This report only includes basic demographics and enrollment dates.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Participants
    - ***Report:*** Participant Roster
    - ***Month:*** Select the month for which to run the report.
- Click ***Run.*** A PDF downloads.

IEF List Report

The IEF List report summarizes income eligibility form information saved to participant records for a selected claim month. It includes household information if such information was saved to the participant profile.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Participants
    - ***Report:*** IEF List
    - ***Date:*** Select the month and year for which to run the report.
    - ***Month:*** Select the month for which to run the report.
- Click ***Run.*** A PDF downloads.

Participant Racial Counts Summary Report

The Participant Racial Count Summary report provides a count of enrolled participant broken down by race and ethnicity.

- From the menu to the left, click
- On the Reports page, select the following:
    - ***Category:*** Participants
    - ***Report:*** Participant Racial Counts Summary
    - ***Month:*** Select the month for which to run the report.
- Click Run. A PDF downloads.

Participant IEF/Child Enrollment Form report

The Participant IEF/Child Enrollment Form report prints enrollment and/or income eligibility forms for participants you select.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
  - ***Category:*** Participants
  - ***Report:*** Participant IEF/Child Enrollment
  - ***Participants:*** Select Specific Child or Multiple Children.
    - *Specific Participant:* Click the Select a Participant drop-down menu and select the participant for whom to run the report.
    - *Multiple Participants:* Click the Status drop-down menu and select Active, Pending, or Both. Then, select how to sort the participants included. You can sort by Participant Number, Participant First Name, or Participant Last Name (this option appears after the Forms drop-down menu).
    - *Forms:* Select Enrollment Page Only, Income Eligibility Page Only, or Both.
- Click ***Run.*** A PDF downloads.

Claim Statement Reports

Claim 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.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
  - ***Category:*** Claim Statements
  - ***Report Name:*** Claim Error Report
  - ***Month:*** Select the month for which to run the report.
- Click ***Run.*** A PDF of the report downloads.

Claims Roster

The Claims Roster lists participant, enrollment information, FRP status, basis, and more.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
  - ***Category:*** Claim Statements
  - ***Report Name:*** Claim Roster
  - ***Month:*** Select the month for which to run the report.
- Click ***Run.*** A PDF of the report downloads.

You can also print this report from the Claim Details page.

1. From the menu to the left, click ***Claims.***
2. Select the claim to view. the claim Details page opens.
3. Click ***Claim Actions*** and select ***Print Claim Roster.***

Finance Reports

Center Receipts Journal Report

The Center Receipts Journal report lists your receipt entries for the selected claim month.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
  - ***Category:*** Finance
  - ***Report Name:*** Center Receipts Journal
  - ***Month:*** Select the month for which to run the report.
- Click ***Run.*** A PDF downloads.

Non-Profit Status Report

This report lists your claim amounts, reimbursement amounts, and any possible profits. This allows you to assess whether you meet non-profit status. You can print this report to PDF or to a spreadsheet.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
  - ***Category:*** Finance
  - ***Report Name:*** Non-Profit Status Report
  - ***Month:*** Select the month for which to run the report.
  - ***Format:*** Select PDF or Excel.
- Click ***Run.*** The report downloads in the format you selected.

Meals & Attendance Reports

Menu Production Record

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Meals & Attendance
    - ***Report:*** Menu Production Record
    - ***From/To:*** Select a start and end date for the report.
- Click ***Run.*** A PDF downloads.

Weekly Quantities Required

The Weekly Quantities Required report lists the amount of food required weekly.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Meals & Attendance
    - ***Report:*** Weekly Quantities Required
    - ***From/To:*** Select a start and end date for this report.
- Click ***Run.*** A PDF downloads.

Center Weekly Menu

The Center Weekly Menu report prints your weekly menu plan. You can print this for a single week or the entire month.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
  - ***Category:*** Meals & Attendance
  - ***Report:*** Center Weekly Menu
  - ***Date:*** Select a start date for the report. The report will generate for that week.
  - ***Type:*** Non-Infant, Infant, or Both
  - ***Number of Weeks:*** Single Week or Entire Month
- Click ***Run.*** A PDF downloads.

Center Monthly Menu Plan

The Center Monthly Menu Plan report prints your menu plans for the entire month.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
  - ***Category:*** Meals & Attendance
  - ***Report:*** Center Monthly Menu Plan
  - ***Claim Month:*** Select the claim month for which to run the report.
  - ***Type:*** Non-Infant or Infant
- Click ***Run.*** A PDF downloads.

Menu Notes Report

The Menu Notes report lists all notes made on recorded menus for the month you select. This report is generated as a PDF you can download and save to your computer.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Meals & Attendance
    - ***Report:*** Menu Notes Report
    - ***Month:*** Select the month for which to print the report.
- Click ***Run.*** A PDF downloads.

Print the Infant Feeding Report

If you have enabled individual infant menu reporting, you can print individual infant menus. This report also includes information such as whether the parent accepts center formula and/or food, the infant's age in months, the infant's date of birth, and more.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Meals & Attendance
    - ***Report:*** Infant Feeding Report
    - ***Claim Month:*** Select a start and end date for the report.
- Click ***Run.*** A PDF downloads.

Daily Attendance + Meal Count Report

The Daily Attendance + Meal Count report is a worksheet you can use to record daily attendance and meal counts. A space for parent signatures is included on this worksheet.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Meals & Attendance
    - ***Report:*** Daily Attendance + Meal Count Report
    - ***From/To:*** Select a start and end date for the report.
- Click ***Run.*** A PDF downloads.

Weekly Attendance + Meal Count Report

The Weekly Attendance + Meal Count report lists weekly attendance and meal counts for your center. Note that attendance for one (1) year-olds is underlined and in bold. This provides a quick visual reference as to how many children are in the one year-old age group, since this age group must be served whole milk.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Meals & Attendance
    - ***Report:*** Weekly Attendance + Meal Count Report
    - ***Date:*** The user can select a start date for the report. The report will generate for that week.
    - ***Report Span:*** Select Single Week or Entire Month
    - ***Classroom:*** Select a specific classroom or All Classrooms.
- Click ***Run.*** A PDF downloads.

Monthly Claimed Attendance Only Report

The Monthly Claimed Attendance Only report includes claimed attendance for the selected claim month.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
  - ***Category:*** Meals & Attendance
  - ***Report:*** Monthly Claimed Attendance Only
  - ***Month:*** Select the claim month.
- Click ***Run.*** A PDF downloads.

Weekly Paid Attendance + Meal Counts Report

The Weekly Paid Attendance + Meal Counts report lists weekly attendance, broken down by attendance and meal.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
  - ***Category:*** Meals & Attendance
  - ***Report:*** Weekly Paid Attendance + Meal Count Report
  - ***Date:*** The user can select a start date for the report. The report will generate for that week.
  - ***Report Span:*** Select Single Week or Entire Month.
  - ***Classroom:*** Select a specific classroom or All Classrooms.
- Click ***Run.*** A PDF downloads.

Estimated Meal Count Summary Report

The Estimated Meal Count Summary report lists estimated meal counts for a selected month.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Meals & Attendance
    - ***Report:*** Estimated Meal Count Summary
    - ***Month:*** Select the claim month for which to print the report.
- Click ***Run.*** A PDF downloads.

Actual vs Estimate Meal Count Summary Report

The Actual vs Estimated Meal Count Summary report compares actual meal counts with the estimated meal counts, broken down by meal.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Meals & Attendance
    - ***Report:*** Actual vs Estimate Meal Count Summary Report
    - ***Date Range:*** The user can select a start date for the report. The report will generate for that week.
- Click ***Run.*** A PDF downloads.

Monthly Paid Attendance Only Report

The Monthly Paid Attendance report lists paid attendance for a selected claim month, as well as classroom totals.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Meals & Attendance
    - ***Report:*** Monthly Paid Attendance Only
    - ***Month:*** Select the claim month.
- Click ***Run.*** A PDF downloads.

Monthly Paid Meal Counts by Age Group Report

The Monthly Paid Meal Counts by Age Group report lists paid meal counts for a selected claim month by age group, as well as totals for each age group.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Meals & Attendance
    - ***Report:*** Monthly Paid Meal Counts by Age Group
    - ***Claim Month:*** Select the month for which to run the report.
- Click ***Run.*** A PDF downloads.

Monthly Claimed Meal Counts by Age Group Report

The Monthly Claimed Meal Counts by Age Group report lists claimed meal counts for a selected claim month by age group. It also includes totals for each age group.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
  - ***Category:*** Meals & Attendance
  - ***Report:*** Monthly Claimed Meal Counts by Age Group
  - ***Claim Month:*** Select the month for which to run the report.
- Click ***Run.*** A PDF downloads.

Monthly Claimed Meal Count Summary

The Monthly Claimed Meal Count Summary report list the total number of meals claimed for a selected claim month.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
  - ***Category:*** Meals & Attendance
  - ***Report:*** Monthly Claimed Meal Count Summary
  - ***Date:*** Select the month for which to run the report.
- Click ***Run.*** A PDF downloads.

Monthly Paid Meal Count Summary

The Monthly Paid Meal Count Summary report lists all paid meals for a selected claim month. It is broken down by meal type.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Meals & Attendance
    - ***Report:*** Monthly Paid Meal Count Summary
    - ***Date:*** Select the month for which to run the report.
- Click ***Run.*** A PDF downloads.

Daily FRP Report

The Daily FRP report provides a Free, Reduced, and Paid breakdown of all meals claimed for the day selected for the report.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
    - ***Category:*** Meals & Attendance
    - ***Report:*** Daily FRP Report
    - ***Date:*** Select the date for which to print the report. This defaults to the current date.
- Click ***Run.*** A PDF downloads.

Weekly Quantities Required

The Weekly Quantities Required report gives you a list of menu components and the total amount you need to purchase or have on hand for the week you select. It is your “shopping list” that pulls menu components and estimated attendance so that you can plan to have enough food onsite for each meal.

Note: This report will only generate if you have menus and estimated attendance entered for the week you are selecting.

- From the menu to the left, click ***Reports.***
- On the Reports page, select the following:
  - ***Category:*** Participants
  - ***Report:*** Participant Roster
  - ***Month:*** Select the month for which to run the report.
- Click ***Run.*** A PDF downloads.

eForms
Enrollment Reports

The eForms Reports page lets you retrieve, view, and print enrollment records. This includes both enrollment forms (EF) and income eligibility forms (IEF). Each form type is listed on a separate line.

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

> ***Note***: You can also access this page from the Approve & Renew page. To do so, click View Reports.

- In the ***Show Records*** For section, enter your report criteria.
  - ***First drop-down menu:*** Select Enrollment or Re-Enrollment.
  - ***Second drop-down menu:*** Select the form type (EF or IEF).
  - ***Third drop-down menu:*** Select the date range (Current Year, Previous Year, Custom Date Range).
  - ***Fourth drop-down menu:*** Select a particular child to view. You can also type the child name to filer the list.
  - ***From/To boxes:*** If you selected Custom Date Range in the third drop-down, use these boxes to set a date range.
- 4. Click ***Run.***
- 5. Set additional filters/sorts, as needed.
  - Click the ***Participant Name*** box in the table and begin typing to search for a particular participant.

> ***Note***: According to your display settings, this box may be called something else, such as Child Name. For more information, see Set Display Settings.

    - Click ***Filters*** in the top-right corner and select First Name or Last Name to sort by first or last name.
    - Click the ***Participant Name*** column or the Last Updated column to sort records in ascending or descending order.
- To view individual forms for a particular record, click ***View Form*** on the appropriate row. A PDF downloads.
- To view multiple forms together:
    - Check the box next to the records to view.
    - Click ***Combine & Print Forms.*** A combined PDF downloads.

eForms

Understand eForms

Your KidKare Food Program package includes a subscription to eForms. eForms is an all-in one enrollment process for the food program that eliminates paper forms. With eForms, you can:

- ***Send Invitations:*** Send forms to guardians via email. Guardians can then fill out and submit the forms from their computer or mobile device. Guardians can only submit completed forms, so you only receive forms that are 100% complete.
- ***Track Enrollment Status:*** Track form completion on the View Status page, resend invitations, and open forms for guardians to complete onsite.
- ***Approve & Renew Enrollment:*** Once forms are submitted, review them directly from your computer or device, approve them, and renew enrollment.

All forms are stored digitally, and you can retrieve them at any time. This saves time and space by eliminating the need to print and re-print forms.

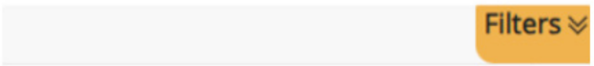
Getting Started Checklist

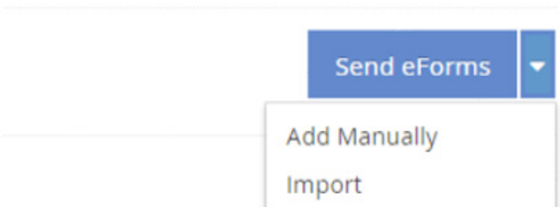
Click here to print a useful checklist for getting started with eForms. Follow along with the steps, and check each item off as you complete it.

Add New Participants Using eForms

You can use eForms to enter basic information about a participant and then send an invitation to their guardian to complete and sign the enrollment form.

- From the menu to the left, click ***Children.***
- Select ***List Children.***
- Click on ***Send eForms*** in the top right corner. If is shows Add Manually instead of Send eForms, Click and select ***Send eForms.***





- Complete the ***Child 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 to add a new classroom.
  - If you need to enroll a sibling at the same time, click ***+ Add Child.*** Repeat ***Steps 4a - 4c*** 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.***

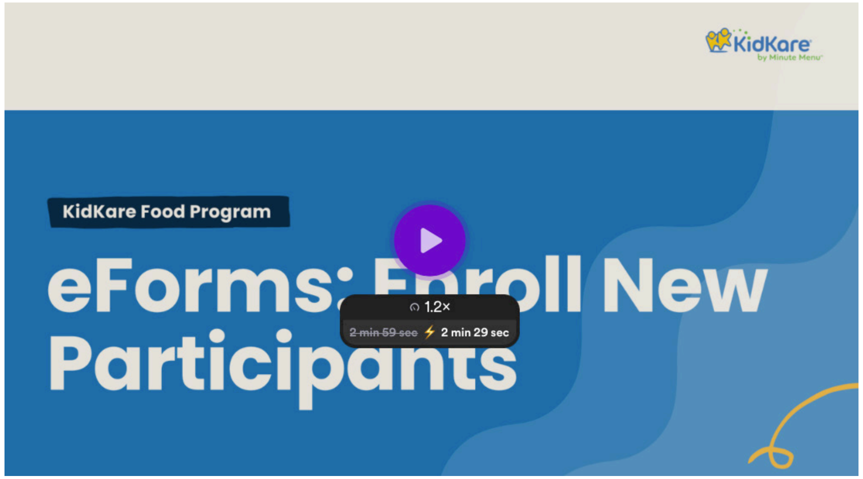
What Do I Do if the Guardian Does Not Have an Email Address?

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.
- 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 while on site.

Next Steps

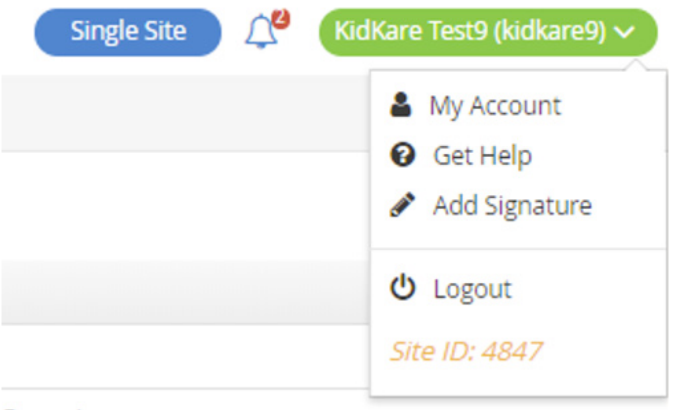
Once parents complete the necessary enrollment and income eligibility forms, you must approve and renew participants on the Approve & Renew page. You can also monitor enrollment status on the View Status page. For more information.



Add a Signature for eForms

You must add a signature to KidKare when using eForms. This signature is added to all eForms you approve or approve and renew.

- 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.

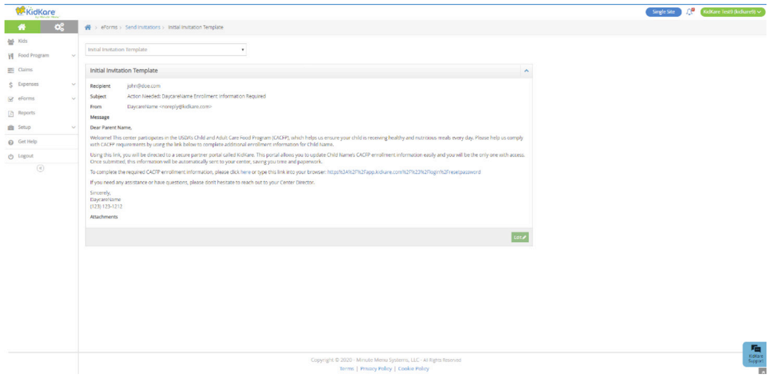
- Click ***Accept & Sign.***

Video Link: [***Add Signature for eForms***]

Customize eForms
Email Templates

When you send eForms invitation, revision request, etc. to a guardian, they receive it via email. You can customize these emails to suit your business.

- From the menu to the left, click ***eForms.***
- Select ***Send Invitations.***
- Click ***Edit Email.*** The template page opens and displays the Initial Invitation template.



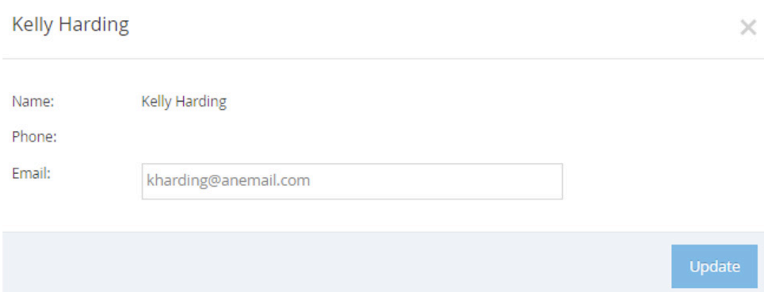
- Click the ***Template*** drop-down menu and select the email template to change.
- Click ***Edit.***
- Update the ***Subject, From, and Message boxes,*** as needed.
    - Variables you can use to fill-in certain information are listed at the bottom of the editor (#ParentName#, #ChildName#, and so on).
    - When editing the Message, use the toolbar to format your text. You can also insert URLs, insert images, embed videos, and switch to an HTML editor.
- Add attachment if needed.
- When finished making edits, click ***Save.***

Video Link: ***Edit Email Templates***

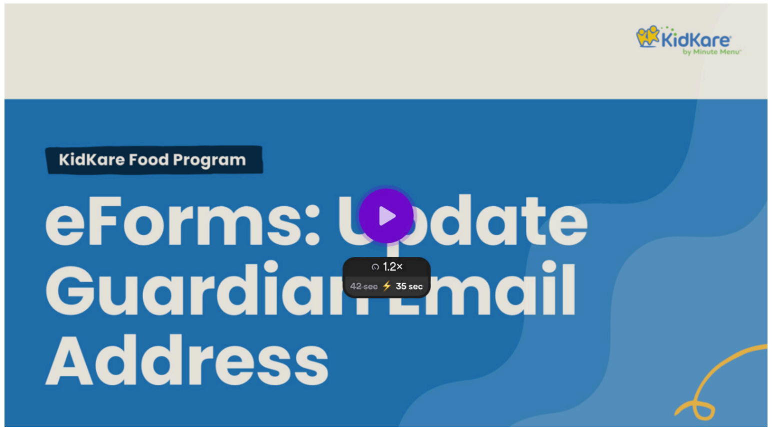
Update Guardian Email Addresses

Participant records that do not have an associated email address are indicated by on the View Status page. You can quickly add an email address to these records without leaving this page.

- From the menu to the left, click ***eForms.***
- Click ***View Status.***
- Click the participant's name in the ***Child Name*** column. A pop-up opens and displays the guardian's contact information.



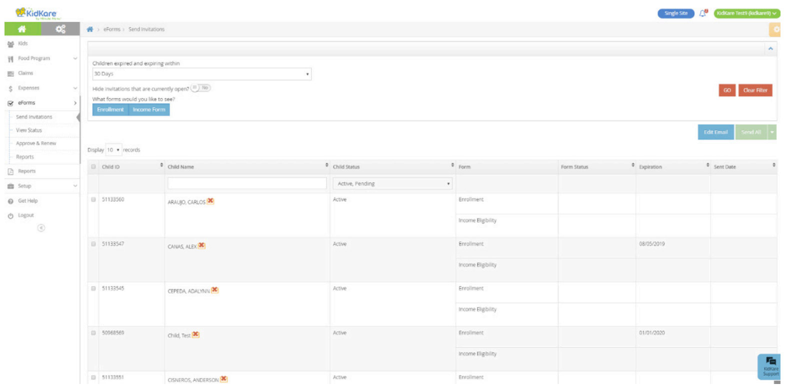
- Click the ***Email*** box and enter a valid email address.
- Click ***Update.***



Send Invitations

The Send Invitations page is where you send invitations to renew enrollment with your center.

- From the menu to the left, click ***eForms.***
- Click ***Send Invitations***



- Set filters for the participants to include.
  - Click the ***Children Expiring Within*** drop-down menu and select a date range ***(30 Days, 60 Days, 90 Days, or Custom Date).***

> ***Note:*** According to your display settings, this option may be called something else, such as Children Expiring Within. For more information, see Set Display Settings.

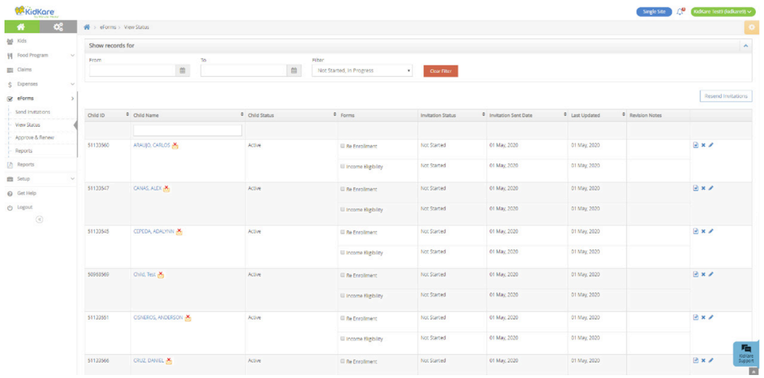
  - Click the slider next to ***Hide Invitations That Are Currently Open*** to hide open invitations. This is set to No by default.
  - In the ***What Forms Would You Like to See*** section, click Enrollment, Income Form, or both.
  - Click ***Go.***
- Check the ***box*** next to the participants to which to send forms. You can also check the ***box at the top of the table*** to select all displayed participants.
  - Only the records on the page you are viewing are selected. You can click the ***Display Records*** drop-down menu to display additional records ***(10, 25, 50, or 100).***
- Send the form(s).
  - To send both enrollment forms and income eligibility forms, click ***Send All.***
  - To send a specific form, click next to Send All and select the form to send.

Video Link: ***Send Renewal Invitations & The Guardians View of an Enrollment***

View
Enrollment Status

The View Status page provides a central place for you to view enrollment status for all participants at your center. You can quickly see who has started their forms, completed their forms, what forms are ready for approval, and so on. You can also take action on invitations, such as re-sending them, opening forms for onsite completion, cancelling invitations, and marking invitations as manually completed.

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



- Use the ***From and To*** boxes to select a date range to view.
    - To view forms from a specific date to the current date, select a date in the ***From*** box and leave the ***To*** box blank.
    - To view forms up to a specific date, leave the ***From*** box blank and select a date in the ***To*** box.
    - To view forms for a single day, select the same date in the From and To boxes.
- Click the ***Filter*** drop-down menu and select the form status to view. You can select multiple statuses, if needed.

- To filter to a specific participant, click the ***Child Name*** box, and begin typing the participant's name.
- You can sort information in ascending or descending order by the following columns:
    - Child ID
    - Child Name
    - Child Status
    - Invitation Status
    - Invitation Sent Date
    - Last Updated

Note: Some of the columns listed above may not display. To customize which columns display, click Filters in the top-right corner, and click each column to select it. You can also change the default sort options.

Invitation Invitation Status Definitions

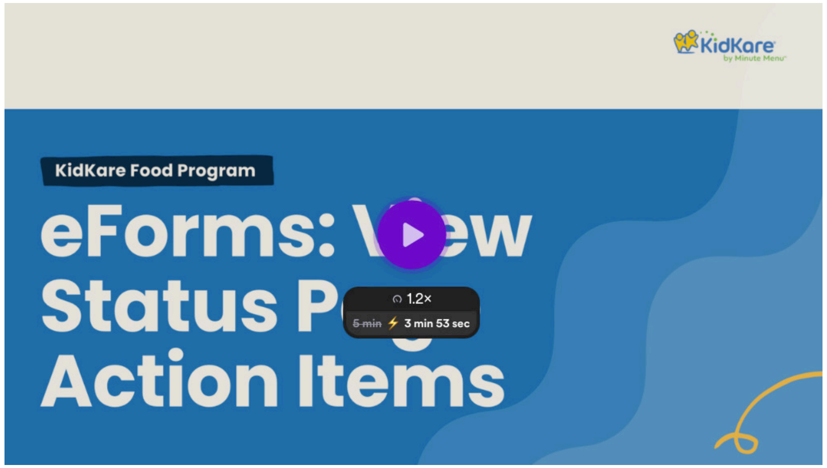
Status	***Definition***
Not Started	The guardian has not started filling out the form yet.
In Progress	The guardian has started filling out the form, but has not yet finished.
Submitted (Parent)	The guardian has completed and submitted the form. It is now ready for approval.
Manually Completed	The guardian completed a paper form, and you flagged the record accordingly (pencil icon).
Sponsor Approved	You have approved the form.
Renewed	You have updated the system with the new enrollment date.
Canceled	The invitation was canceled.

Video Link: ***View Status and Status Definitions***

Resend Invitations

If a guardian advises they did not receive their eForms invitations, resend them from the View Status page. You may also consider confirming and updating the guardian's email address.

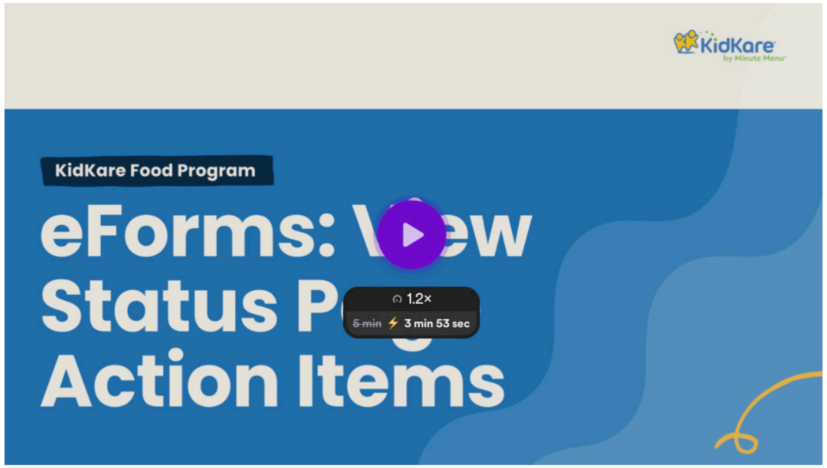
- From the menu to the left, click ***eForms.***
- Click ***View Status.***
- To resend invitations individually, click on the row for the appropriate participant.
- To resend invitations in bulk:
    - Click ***Resend Invitations.***
    - Click ***Yes*** at the confirmation prompt. All invitations at Not Started or In Progress status are sent out again.



Cancel
Invitations

You can cancel enrollment invitations from the View Status page.

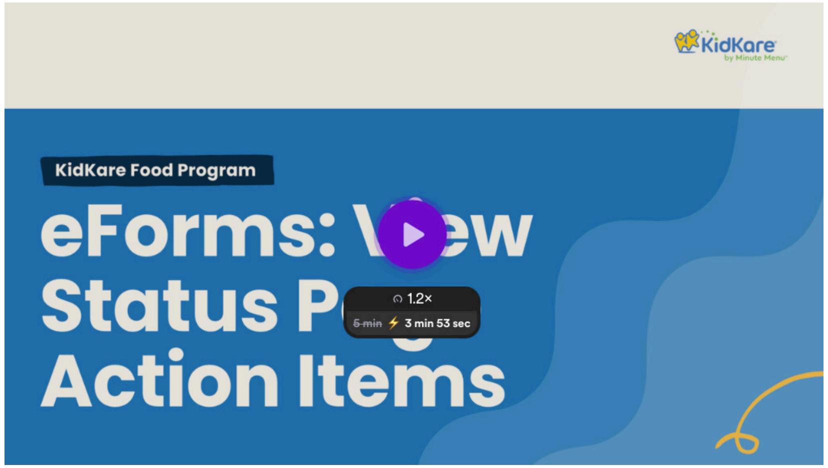
- From the menu to the left, click ***eForms.***
- Click ***View Status.***
- Locate the participant for whom to cancel an invitation.
- Click in the column to the far right.
- Click ***Delete*** at the confirmation prompt.



Complete
eForms Onsite

If a guardian advises they do not have access to the Internet, their own device, or email address to complete enrollment forms, you can open the forms for them to complete on-site.

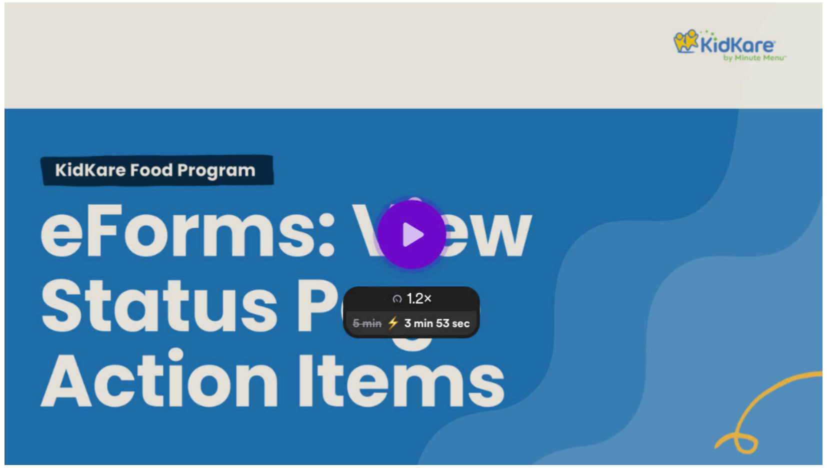
- From the menu to the left, click ***eForms.***
- Click ***View Status.***
- In the ***Show Records*** For section, set filters, if needed.
    - Use the ***From*** and ***To*** boxes to set a date range to view.
    - Click the ***Filter*** drop-down menu and select the status to view.
- Click . The form opens.
- Have the guardian use the computer/device to complete the forms, beginning with the participant's date of birth.
- Once the guardian has completed each page of the form, you are returned to the eForms page. The completed form has the status of Submitted (Parent). You can now ***Approve*** the form.



Mark Forms as Manually Completed

Some guardians may have completed their forms on paper. You can mark these forms as complete in KidKare.

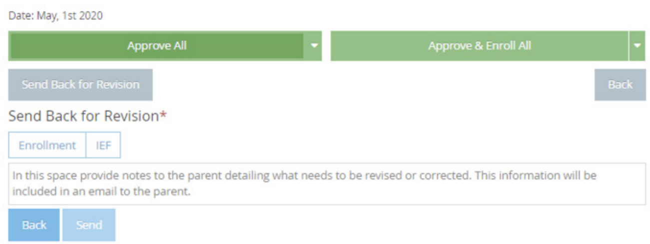
- From the menu to the left, click eForms.
- Click View Status.
- Locate the participant to update.
- Click in the column to the far right.
- Respond to the confirmation prompt.



Approve eForms

If you are a single-site center, you may choose to approve forms without renewing them. *Forms that you approve receive a status of Submitted (Sponsor):*

- From the menu to the left, click ***eForms.***
- Select ***Approve & Renew.***
- Click on the participants name to review the forms their guardian has submitted.
- Review the information and signatures provided. Information that has been updated since the last enrollment is outlined in red for you to quickly identify.
- Click  and choose from the following:
  - ***Approve All*** – If both forms are complete and need to adjustments from the guardian.
  - ***Approve EF*** – If the Enrollment form is complete, but the Income Eligibility form needs to be sent back to the guardian for revisions.
  - ***Approve IEF***– If the Income Eligibility form is complete, but the Enrollment form needs to be sent back to the guardian for revisions.
- If the enrollment form or income eligibility form needs revision:
  - Click ***Send Back For Revision.***



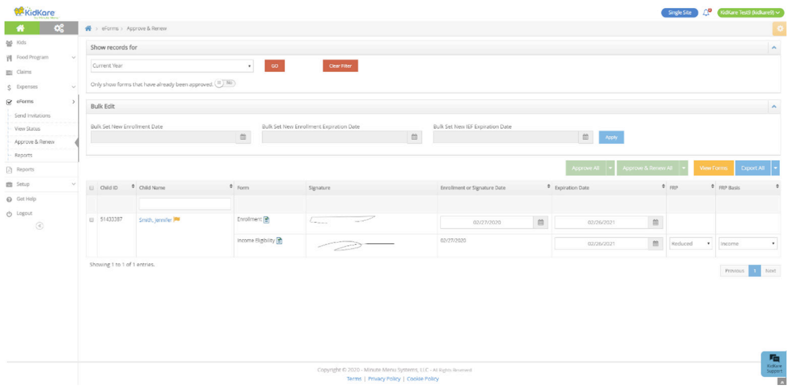
  - ***Select Enrollment,*** IEF, or both.
  - Click the text box and enter any notes for the parent regarding the revisions that are needed.
  - Click ***Send.***

Video Link: ***Approve vs Approve & Renew***

Approve & Renew eForms

Once guardians complete the necessary enrollment and income eligibility forms, you must approve and renew participants on the Approve & Renew page. This gives you control over when your database is updated. However, keep in mind that participants with future enrollment dates may be disallowed from your current claim. In many cases, it is better to wait until the current claim is processed before you renew enrollments. For example, if your new enrollment start date is October 1st, you should wait until the September claim is processed before renewing your enrollments.

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



- Filter to the records to renew.
  - Click the ***drop-down menu*** in the Show Records For section and choose from the following:
    - 30 Days
    - 60 Days
    - 90 Days
    - Current Year
    - Previous Year

- There are three ways to approve and renew enrollments:
  - Accept the dates generated by the system (parent signature dates).
  - Use the Bulk Edit feature to set enrollment dates.
  - Approve and renew enrollments individually.

Accepting Dates Generated by the System

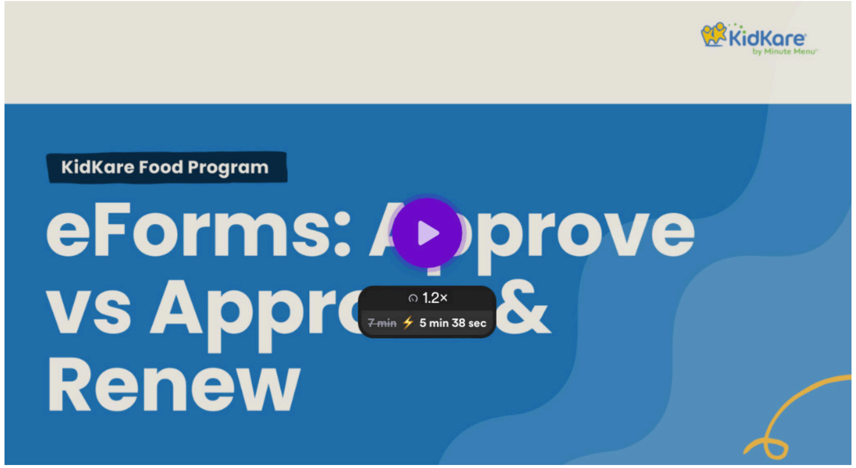
- Check the box next to the records to update.
- Choose one of the following:
  - Click ***Approve*** All to approve the enrollment form (EF) and the income eligibility form (IEF) for the selected records. Respond to the confirmation prompt.
  - Click ***Approve & Renew*** All to approve and renew enrollment and income eligibility for the selected records.
  - Click next to ***Approve All/Approve*** & Renew and select a specific form type to approve/approve and renew (EF, IEF, or All).

Using Bulk Edit to Set Enrollment Dates

- Check the box next to the records to update.
- In the ***Bulk Edit*** section:
  - Click the ***Bulk Set New Enrollment Date*** box and enter a new enrollment date. You can also click to select the date from a calendar.
  - Click the ***Bulk Set Enrollment Expiration Date*** box and enter a new enrollment date. You can also click to select the date from a calendar.
  - Click the ***Bulk Set New IEF Expiration Date*** box and enter a new IEF expiration date. You can also click to select the date from a calendar.
  - Click ***Apply.***
- Click ***Approve*** or ***Approve & Renew All.***

Approving and Renewing Enrollments Individually

- Click the participant's name to view participant details.
- Make changes, as needed. For example, you can update the new enrollment date and the new enrollment expiration date.
- Click ***Approve or Approve & Renew.*** You can also click ***Send Back For Revision*** if revisions are required.



Export Enrollment Renewal Data

You can export enrollment renewal data to an Excel® spreadsheet (.XLSX). When you export enrollment data, you can either export all data or the current view. Exporting the current view means that your filters are applied to the export.

- From the menu to the left, click ***eForms.***
- Click ***Approve & Renew.***
- Filter to the records to export, if needed.
- Click ***Export All or Export View.*** Click the ***down arrow*** next to the Export button to change between Export All and Export View.

Run Enrollment Reports

The eForms Reports page lets you retrieve, view, and print enrollment records. This includes both enrollment forms (EF) and income eligibility forms (IEF). Each form type is listed on a separate line.

- From the menu to the left, click eForms.
- Select Reporting-eForms. The Reporting page opens.

> ***Note:*** You can also access this page from the Approve & Renew page. To do so, click View Reports.

- In the Find Records section, enter your report criteria.
  - First drop-down menu: Select Enrollment or Re-Enrollment.
  - Second drop-down menu: Select the form type (EF or IEF).
  - Third drop-down menu: Select the date range (Current Year, Previous Year, Custom Date Range).
  - Fourth drop-down menu (optional): Select a particular child to view. You can also type the child name to filer the list. If you want to view all children, leave this blank.
  - From/To boxes: If you selected Custom Date Range in the third drop-down, use these boxes to set a date range.
- Click Run.
- To view individual forms for a particular record, click View Form on the appropriate row. A PDF downloads.
- To view multiple forms together:
  - Check the box next to the records to view.
  - Click Combine & Print Forms. A combined PDF downloads.

Video Link: ***Reports & Forms***

Stay Connected to Families Using Messages

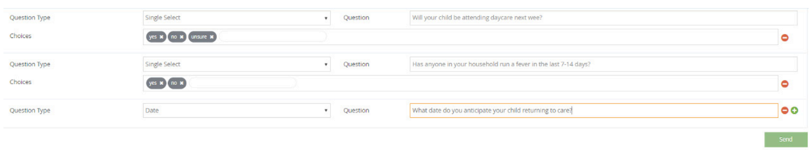
About Messages

KidKare's messaging feature allows you to send messages to guardians of participants enrolled in your center. If you are a sponsored center, you can also send messages directly to your sponsor (if they allow it). You can message guardians individually, in small groups, or you can send one message to all parents for active participants at the same time. When messaging guardians, you also have the option to attach planned menus and include a survey to which guardians can respond. These surveys can be used to plan attendance, screen for COVID-19 symptoms, or gather any other information you need from parents.

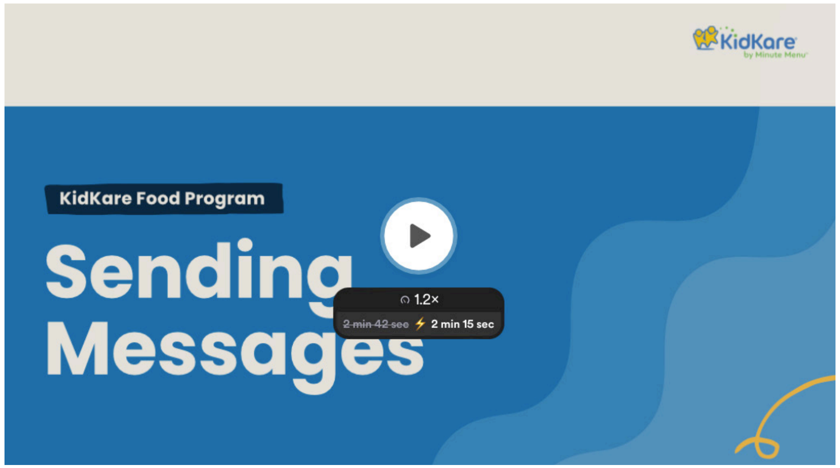
Send Messages

- Click [envelope icon]. The Messages page opens.
- Click ***Send Message.*** The Message Editor opens.
- Click the ***Send To*** drop-down menu and select the people you are messaging:
  - To send a message to your sponsor, select ***Sponsor.***
  - To send a message to one or more guardians, click each guardian name to include in the message. You can use the ***Search*** box in this menu to search for specific contacts.
  - To message all guardians, select ***Guardians for All Active*** Participants.
- Click the ***Subject*** box and enter a subject for your message.
- Click the ***Message*** box and enter your message content.
- To attach a menu:
  - Click ***Add Attachment*** and select ***Menu***. The Attach Menu pop-up opens.
  - Click the ***Menu Type*** drop-down menu and select Monthly, Weekly, or Custom.
  - Select the date for which to send the month. The available options vary according to the menu type you selected.
    - ***Monthly:*** Click the Select Month box and select the month for which to send menus.
    - ***Weekly:*** Click the Select Day box and select a day in the week to send. Menus for dates in the same week are attached.
    - ***Custom:*** Click the From box and enter the first date in the range to send. Then, click the To box and enter the last date of the range to send.
  - Click ***Attach***. The Scheduled Menus report for the month or the week is attached to the message.
- Click ***Add Attachment*** and select File to add any additional attachments to this message. For example, you could attach a PDF newsletter.
- Click the ***Signature*** box and enter your email signature. If you are messaging your sponsor, go to ***Step 10.***

- To add a survey:
  - Click the ***Question Type*** drop-down menu and select the question type to include on the survey. You can choose from the following:
    - ***Single Select:*** The guardian can select one answer only.
    - ***Multi-Select:*** The guardian can select multiple answers.
    - ***Date:*** The guardian must select a date.
    - ***Text:*** The guardian can type any answer.
  - Click the ***Question*** box and enter the question. If you selected Date or Text, go to Step 9d.
  - Click the ***Choices*** box and enter the responses from which the guardian can choose. Press ***Enter or Tab*** between choices. To remove a choice, click X or press Backspace.



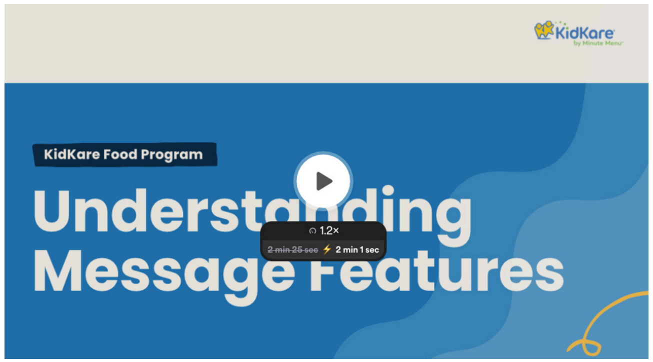
  - Click to add a new question to your survey. Repeat ***Steps 9a – 9c*** to add as many questions, as needed.
  - Click to remove questions from your survey.
- When finished, click ***Send.***



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 Messages page opens and displays the Received tab by default.
- Use the ***Search Messages*** box to filter the messages that display. The message list is updated as you type.
- Click a message to view the message content.
- If the sender attached a file, click the file in the Attachments section to view and download it.
- When finished, click ***Back*** to return to the Received tab.
- 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.

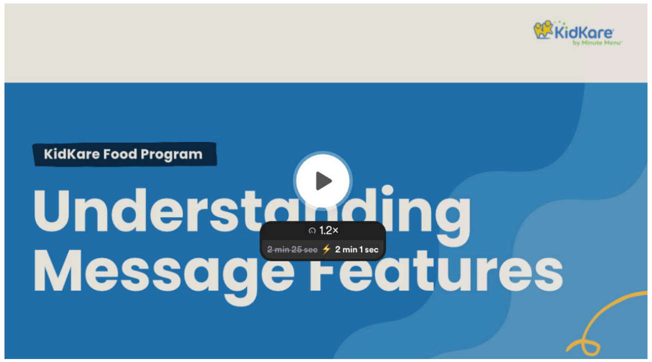


View
Sent Messages

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 t***ab.
- 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. For details, see Send Messages.



View Message Reports

Message reports provide useful data for your sent messages, such as the number of recipients who opened the message, responded to an attached survey, and the responses to your survey. It also provides the original message text and attached questions.

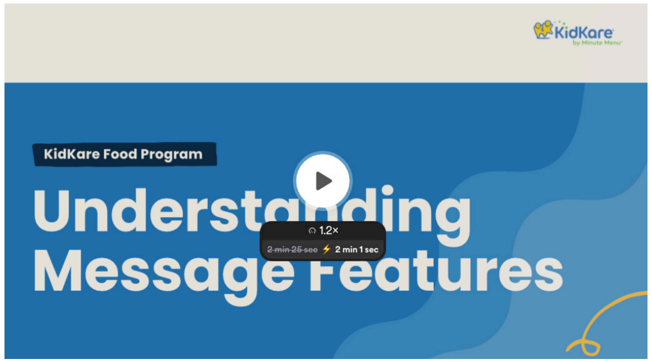
- Click . The Messages page opens.
- Click the ***Sent Messages*** tab. Your sent messages display.
- Click the link in the ***Reports*** column for the message to view. The message report opens.
- This report is divided into the following sections:
  - ***Message Details:*** This section displays the 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 or the responses to a question you select.

Review Question Responses

The Report section is filtered to the Open metrics by default. This view gives you a snapshot of which recipients opened your message.

To view responses to the survey you included:

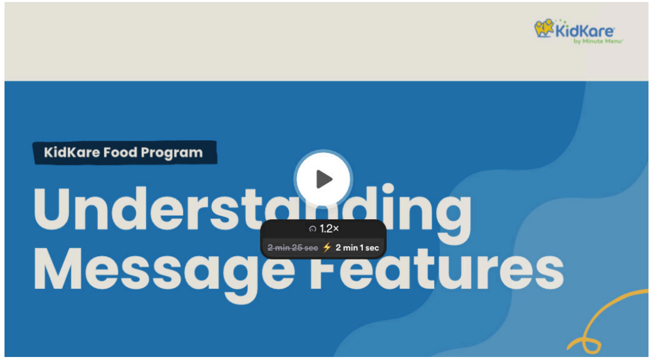
- Click the drop-down menu and select the question to review.
- The report view changes and displays the following:
    - ***Summary:*** The report summary displays to the right of the drop-down menu filter. It lists possible responses to the selected question, the number of responses received, and the number of kids represented by those responses.
    - ***Sent To:*** This column displays the name of the parent/guardian to whom you sent the message.
    - ***Participants(s):*** This column displays the name of the participant(s) represented by the listed guardian. Multiple participants are separated by a comma.
    - ***Response:*** This column lists the parent/guardian's response to the selected survey question.
- Click each column header in the report table to sort information in ascending or descending order.
- Click the ***Search*** box to filter the parent list. Records are updated as you type.
- Click ***Print*** to print this report.
- Click ***Export*** to export this report.



View Contacts

View and update contacts in the Contacts tab on the Messages page.

- Click . The Messages page opens.
- Click the Contacts tab.
- Your contacts display in a table that includes the following information:
    - ***Contact:*** This is the name of the contact.
    - ***Participant(s):*** These are the participants associated with the contact. Click a participant's name to view the Participant Information page.
    - ***Email Notifications:*** This column indicates whether the contact has enabled email notifications.
- Click each column to sort information in ascending or descending order.
- Click the ***Search Contacts*** box to search for a specific contact. The table is filtered as you type.
- To update contact information:
    - Click the guardian name to update. The Primary Guardian pop-up opens.
    - Click each box and enter new information over the existing information. You can update the parent name, phone numbers, email address, and physical address.
    - When finished, click ***Save.***



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.

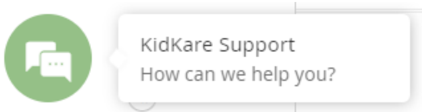
KidKare Training and Knowledge Base

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

KidKare by Minute Menu

Contact Support through Email or Chat

- Live chat with us by clicking the icon in the lower left corner of any KidKare screen (login to **[app.KidKare.com]** with your HX or CX username).



- For technical assistance, email **support@kidkare.com** and mention that you are located in Louisiana.

How to Document Your Request

- Note anything you have tried to fix the issue, like the below general tips, so we know not to suggest them again.
- Clarify the urgency in the subject line (can't submit my claim, question about OER).
- Reply to our email so that we know all the information you have already shared with us instead of sending a new email on the same topic.

- Detailed description of the issue including:
  - Your name, login, and state: your account name, number, and Louisiana.
  - Who is impacted (name and login).
  - Are multiple users impacted or just one that you know of.
  - Do you have the same issue when using different computers.
  - Details of issue. Example: specific report name, claim date, provider, or participant name.
  - Screenshots (hold down the shift and windows keys and type ‘s’. Drag your cursor over the area where you want a screenshot).

General Tips

- Some issues may be with your computer or internet, not necessarily our software. Try the tips at this link to resolve these issues: **Troubleshoot Login Issues.**
  - Accessing a different website (google your local grocery store) to determine if there are issues with your internet connection.
  - Refresh your browser.
  - Clear your browser cache (be sure to clear for 'All Time').
  - Restart your computer.

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