MINUTE MENU CX IMPLEMENTATION GUIDE

A guide to a smooth transition to the Minute Menu CX program. This guide includes links to help documents, e-Learning Courses, and training videos that guide users through each task needed to take full advantage of the Minute Menu CX program.

For Independent Centers

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Welcome to Minute Menu CX

Dear Center,

We are so glad to have you on board as a part of the Minute Menu family! From here on out, you can think of Minute Menu as a partner in achieving your goals for your agency--whether they are to improve program integrity, to grow your program, or simply to make life easier by taking some of the hassle out of processing claims every month.

This document provides clickable hyperlinks (blue and underlined) that will take you directly to training documents, blog posts, e-Learning courses, and training videos (please be patient as the links may take a few seconds to open). These resources will guide you through each task needed to make a smooth transition to Minute Menu CX, and help you take advantage of all areas of the program.

Some steps listed in this guide may not be applicable to your agency and can be skipped.

Please contact me, your Implementation Specialist, if you have any questions.

Thank you,

Dawn Perez

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Installation and Login

Installation

To install Minute Menu CX for the first time, or to install on additional computers, go to www.minutemenu.com/centerwelcome and use the login ID/password that have been provided to you.

Click here to view a blog post about installing Minute Menu CX on multiple computers.

Verify Company Information

Go to **Administration >> Manage Client Info** and update company information as needed to ensure it prints correctly on reports.

Start the Training Process

Go to training.minutemenu.com and access the Minute Menu CX training page. Familiarize yourself and key staff members with the various training documents, training videos, and e-Learning courses available on the website.

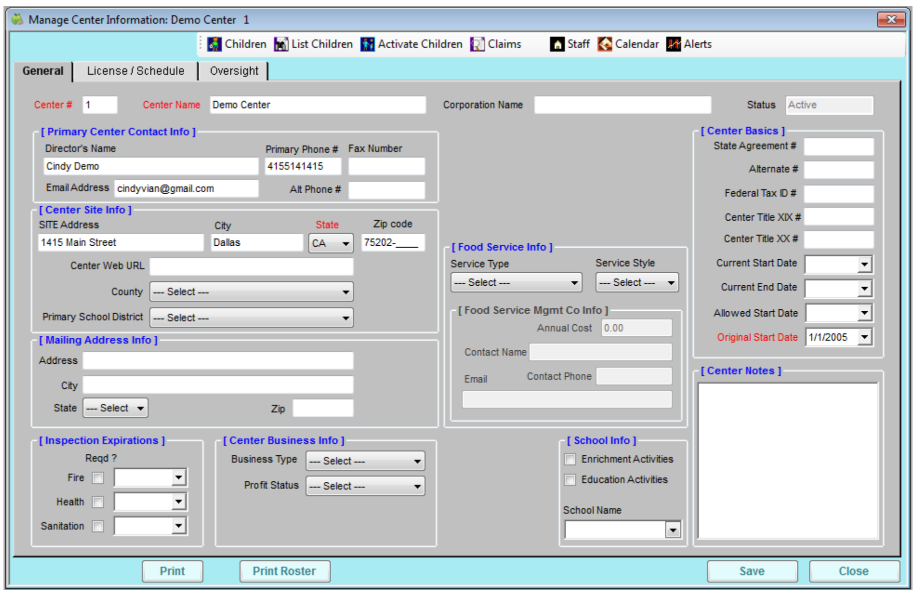
Take the "Getting Started on CX" e-Learning course and watch the "Center Monthly Process Overview" training video for an overview of the program.

Verify and Add Center Data

Manage Center Information

Go to **File >> Manage Center Information** and fill out information on all 3 tabs: General, License/Schedule, and Oversight.

Hint: Fields in **RED** font are required and must be completed before moving forward.



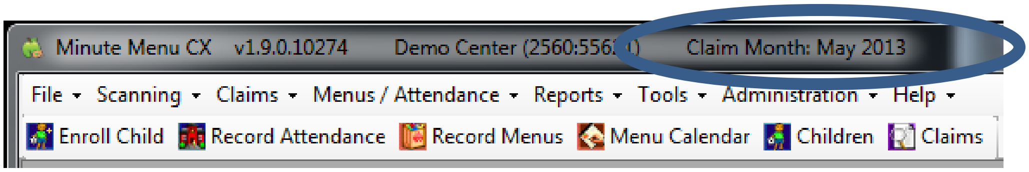
AT-RISK CENTERS

Read help documentation: Go to **Help >> Help Index**, Managing At-Risk Centers.

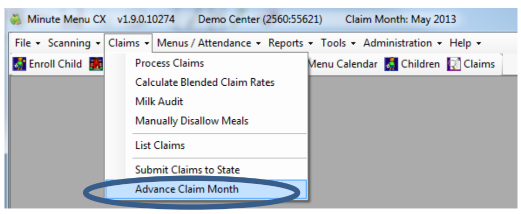
Watch the "Managing At-Risk Licenses and Children" training video to learn how to assign at-risk licenses to centers and mark children as eligible for the at-risk program.

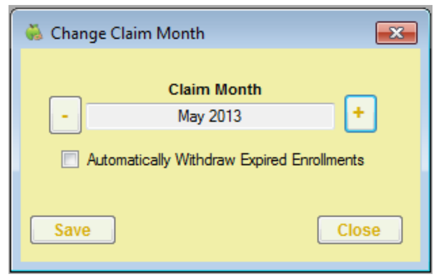
Advance Claim Month

Make sure that the claim month listed at the top of the screen is on the current calendar month.



If the month listed is not correct, change it by going to **Claims >> Advance Claim Month**. Then click the **+** key to go forward (or **–** key to go back). Be sure to save before exiting the screen. The month listed at the top of your screen will immediately update.

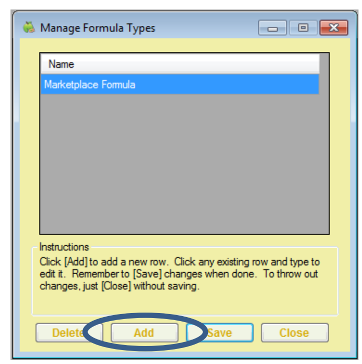




Manage Formula Types

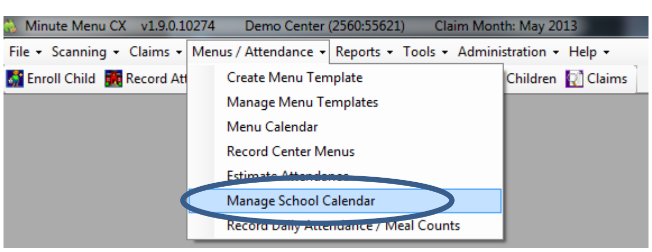
Go to **Tools >> Manage Formula Types** and add formula brands/types that are offered by centers. This will populate the "Formula Offered by Center" and "Parent's Preferred Formula" dropdown boxes located on the **Child** tab of the **Manage Child Information** screen.

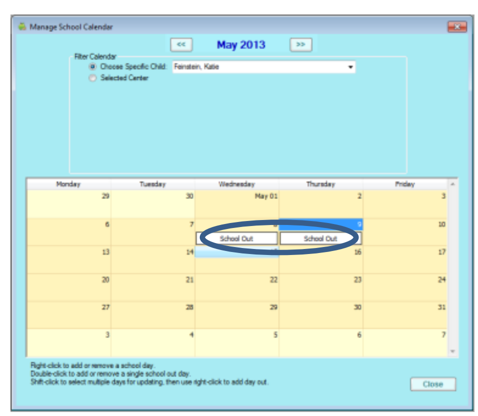
To add a formula, click the **Add** button. Then click the cursor into the blue highlighted area and start typing. Click the **Save** button, and then **Add** another formula or **Close** the screen.



Manage School Calendar

Use the **School Calendar** to mark school-out days. The calendar is accessible from **Menus/Attendance >> Manage School Calendar**. Select a specific child or your center as a whole, and then double-click on a calendar date to add the "school out" designation.





Last Updated: 01/28/2014

Enrolling Children

Importing Children

A recurrent import from another program such as Procare 10 may be possible.

PROCARE

- If a Procare 10 import will be used, DO NOT enroll the children (the *initial* import is an integral part of the process).
- The Centers Integration Service (CIS) requires some setup.
  - View the Quick Start Guide for a summary of the process.
  - Please view the CIS Startup Guide for detailed instructions on setting up CIS with Procare.
- For any questions or support regarding the import, please see the Procare Knowledge Base page and/or contact their technical support department.

OTHER SOFTWARE

Importing children from other programs may be possible, but some setup may be required. Please contact your Implementation Specialist to see if an import is possible.

Enroll Children

To enroll a child, click the **Enroll Child** button. Fill out information on all 3 tabs: **Child**, **Parent**, and **Oversight**.

View the Enroll Child Training Video on training.minutemenu.com to learn how to enroll a child into Minute Menu CX.

View the IEF Calculator Tool Training Video to learn how to set FRP statuses or enter income information/categorical eligibility into the program for each child.

Centers should obtain parent-signed enrollment forms and IEF (income eligibility forms).

Children will appear as "pending" status when initially enrolled. Children should be "activated" after the FRP rate has been assigned and the parent signature on the enrollment form has been verified. The software will provide a prompt to activate children if the IEF Calculator Tool is used, otherwise:

Children can have one of 3 statuses:

Active: Completed enrollment

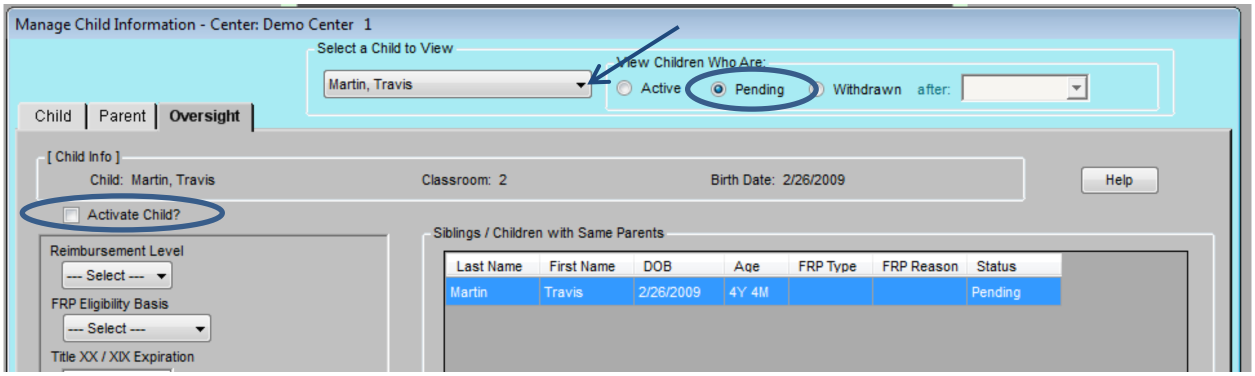
Pending: Incomplete enrollment

Withdrawn: No longer in care

To activate children:

1. Click the **Children** shortcut button.
2. Click the **Pending** option directly to the right of the **Select a child…** dropdown box to filter children by pending status.
3. Select a child from the dropdown box
4. Go to the **Oversight** tab.

5. Click the **Activate Child** box.

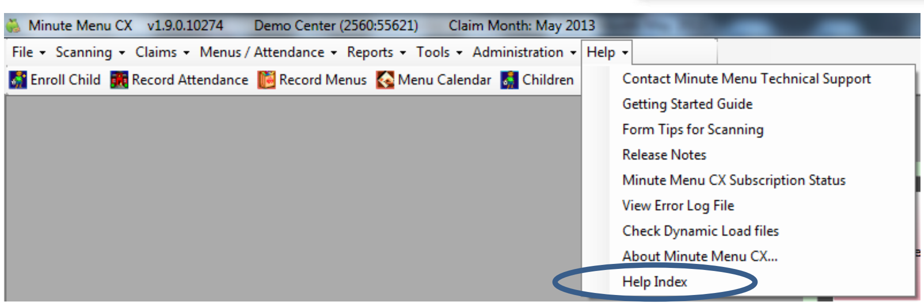


After enrolling children, print the child roster report to review your work. To print the report go to **Reports>>Children>>Child Roster**.

Center Dashboard

View the [Center Dashboard](#) training video to learn how to use the dashboard to make sure that all required information is collected. This will help you maximize your reimbursement. Also, view the [Center Dashboard Help Document](#) for a detailed explanation of how this tool works.

The help document is also accessible from **Help >> Help Index**.



Foods and Menus

Customize Food List

View the [Managing Foods and MPR Quantities] document to learn how to manage foods and for an introduction to the Menu Production Record.

Make sure that the foods available in Minute Menu CX are sufficient to begin planning and recording menus. View the [Managing Foods] training video to learn how to add and remove foods on the food list.

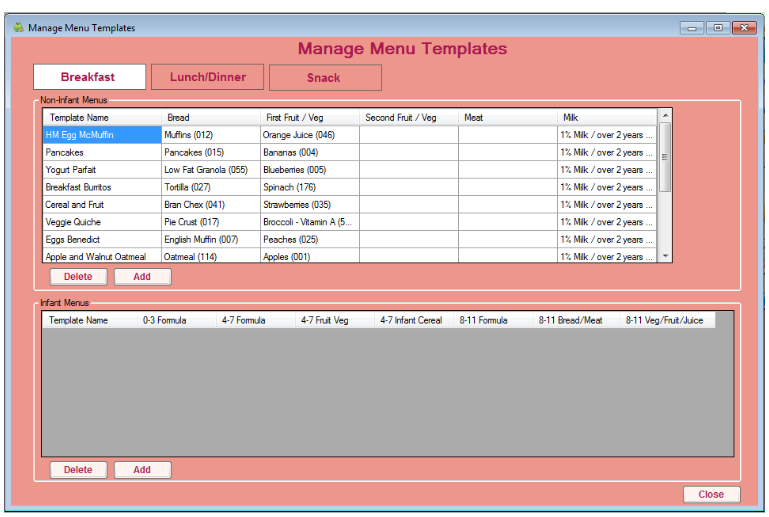
To start managing foods go to **Administration>>Manage Foods**.

Create Menu Templates (Optional)

Make menu planning more efficient and create reusable menu templates! Watch the [Creating Menu Templates] training video located on [training.minutemenu.com] to get started.

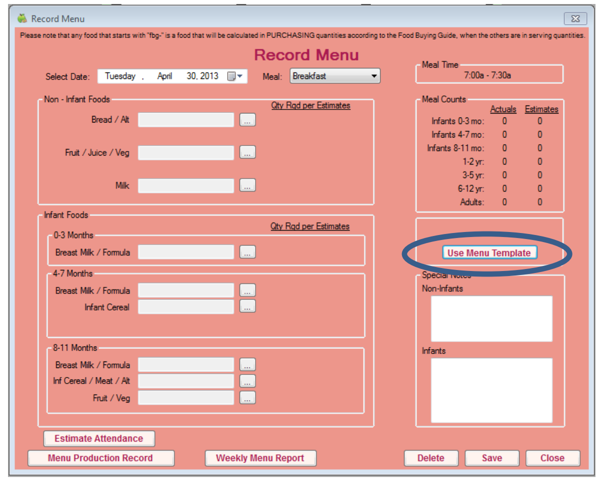
To create a menu template:

1. Open Minute Menu CX
2. Go to **Menus/Attendance>>Manage Menu Templates**
3. Choose the category to add a meal to: Breakfast, Lunch/Dinner, or Snack.
4. Click **Add** button to create a new template
5. Give the template a short but descriptive title
6. Record the food components for the meal by clicking the **[...]** button
7. Click **Save**



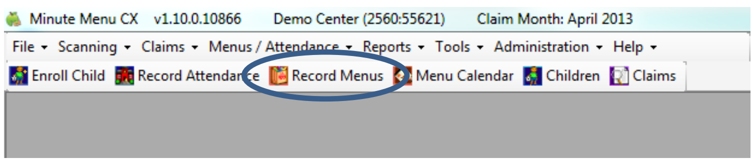
To use the template you created, click the **Record Menus** shortcut button.

For any meal type that has a template available, you will see a **Use Menu Template** button on that screen. (The menu template button will not be visible for meals that do not have templates available.)



Start Recording Menus

Get started planning and recording menus! Click here to view the Planning and Recording Menus help document. You can use menu templates that you created in the previous step or select foods individually. To get started, click the **Record Menus** button at the top left of the screen.



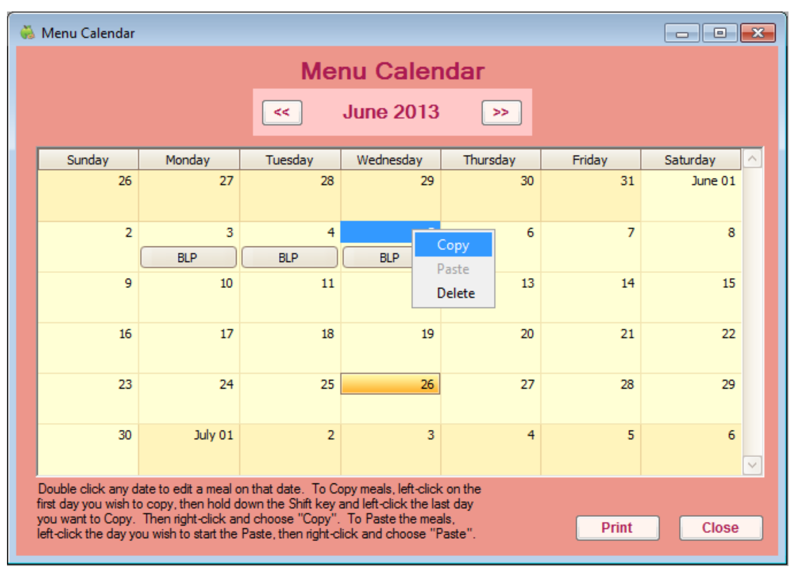
Watch the Record Menus training video to learn how to record a menu. Menus can be recorded anytime, so feel free to preplan menus or record them as you go.

After you've recorded a few meals, take a look at the **Menu Calendar** (accessible from the plate/fork icon on the dashboard). Any day with a meal recorded will display the abbreviation for that meal (BALPDE). Double click any day to edit a meal on that date.

You can copy and paste meals from the Menu Calendar. Copy and paste a single day, a week, or even a month if you like!

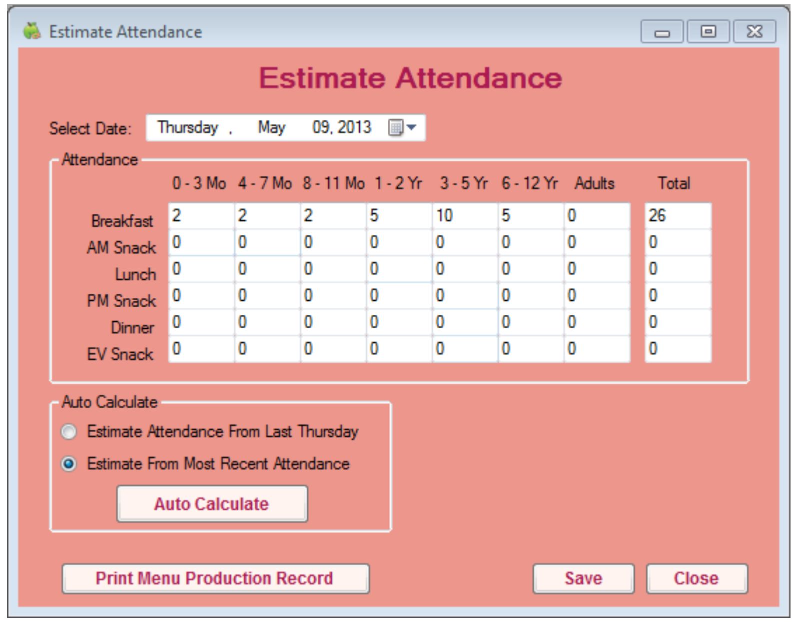
To copy and paste a **day** of meals: Select the day to copy, right click, and select the copy option. Then select a day to paste it to, right click, and select the paste option.

To copy and paste **more than one day** of meals: Select the first day you want to copy. Then, hold down the SHIFT KEY on your keyboard while you select the last day of the range that you'd like to copy. Right click on the selected area and choose the copy option. Select the first day in the range you'd like to paste to, right click, and choose the paste option.



Estimate Attendance

After menus have been recorded, watch the [Estimate Attendance]() training video. The Estimate Attendance tool assists users in planning how much food to purchase and prepare. After a meal is planned, use the tool to make an educated guess on how many children will be present on future days. Then, view the Menu Production Record (MPR) to see how much food will be needed based on those estimates.



To estimate attendance, go to **Menus/Attendance>>Estimate Attendance**. Or use the shortcut button from the **Record Menus** screen.

Type your own estimates in the grid at the top or use the auto calculate feature at the bottom.

Menu Production Record

Once menus have been recorded <u>and</u> attendance has been estimated, view the Menu Production Record. A shortcut button is provided on the Estimate Attendance screen AND the Record Menu screen. The report can also be accessed by going to **Reports >> Menus >> Menu Production Record**.

The Menu Production Record will display the foods, the quantity of food needed for each age group, and the total amount of food needed based on the estimates you provided.

The final "actual" food totals will not be displayed on the report until the actual attendance/meal counts have been taken for that meal.

Demo Center 1 | Non Infant Menu Production Record | Demo Center
4155141415 | Thursday 05/09/2013 | 4155141415

Breakfast		1-2 Yrs	3-5 Yrs	6-12 Yrs	Adults	Total	Total Including Infants
	Estimated Attendance	5	10	5	0	20	26
	Actual Attendance						

Component	Food Served/Planned	Rqd Serving Size By Age 1-2	3-5	6-12	Adult	Qty Needed Per Est Attendance	Qty Needed Per Actual Attendance	Comments
Brd/Alt	Waffles	1/2 serv	1/2 serv	1 serv	2 serv	12 1/2 serv		
Veg/Frt/Juice	Bananas	1/4 c	1/2 c	1/2 c	1/2 c	8 3/4 c		
Milk	Fluid Milk	1/2 c	3/4 c	1 c	1 c	15 c		

Quantity Needed Per *Estimated* Attendance
The program will determine how much food is needed for all age groups based on Estimated Attendance.

Quantity Needed Per *Actual* Attendance
This column will get filled in by the program automatically after the actual meal counts been entered for that meal.

MinuteMenu™ CX

Recording Attendance/Meal Counts

There are 3 ways to record attendance and meal counts in Minute Menu CX:

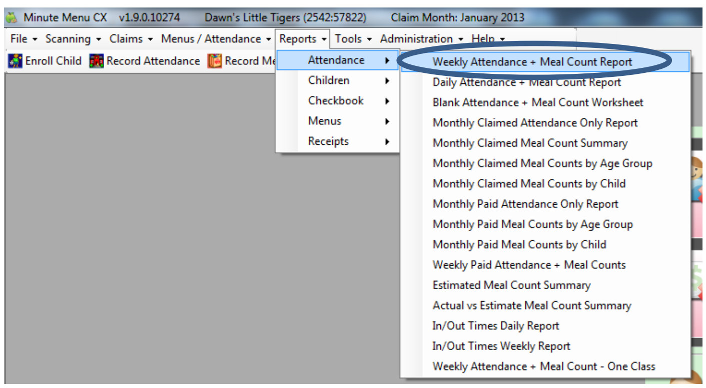
1. Manually (Record Menus screen)

2. cx2go (mobile app)

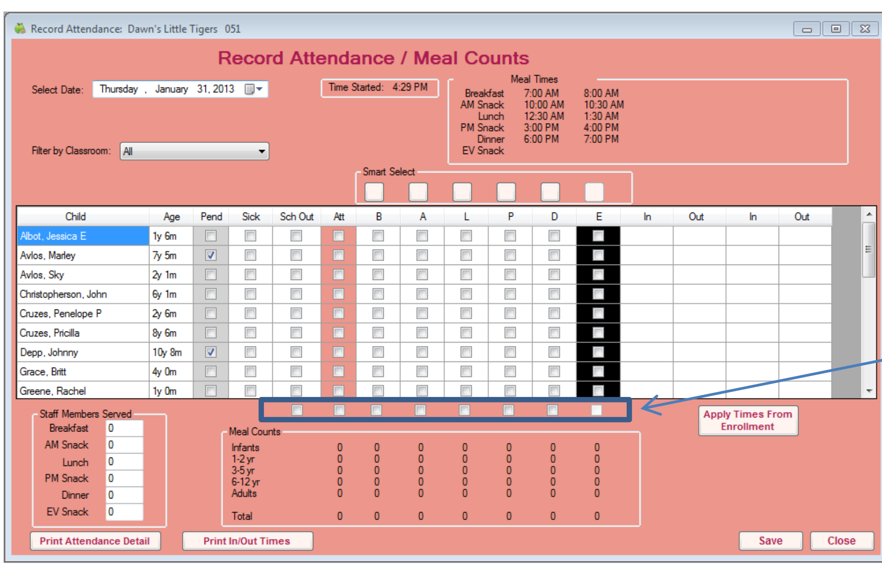
3. Scanning

Manually

Teachers should be trained to record attendance on the Meal Count and Attendance forms. Print this form by going to **Reports >> Attendance >> Weekly Attendance + Meal Count Report**. Watch the Recording Meal Counts and Attendance on Paper training video. Use the Properly Marking Attendance and Meal Count forms document to train Staff to fill out forms correctly.



Then watch the Recording Meal Counts and Attendance into Minute Menu CX training video. Click the Attendance icon on the dashboard to open the function. Make sure that the correct day is selected, and then filter by classroom to make data entry easier.



Use the "select all" check boxes at the bottom for quicker entry.

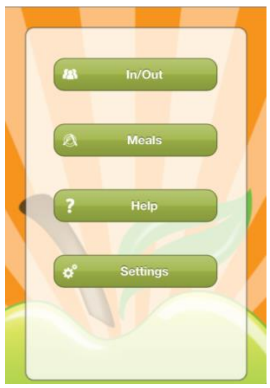
cx2go Mobile App

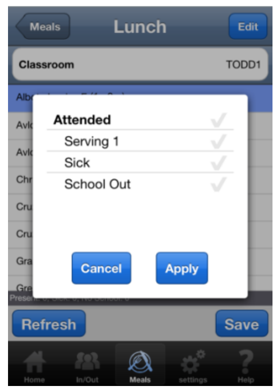
The cx2go mobile app can be used to record attendance and meal counts and child in/out times on a daily basis. Please see the cx2go website for more information.

The full version of the program is still needed for tasks such as: enrolling children, managing classrooms, recording menus, printing reports, etc.

The app can be accessed from various smart phones, tablets, and laptops. To access the app from a laptop, go to cx2go.mobi using either the Chrome or Safari web browser (it will not work using Internet Explorer.)

Two training videos on cx2go are currently available. Watch the cx2go – Recording Meal Counts and Attendance training video to learn how to record daily meal counts and attendance. Watch the cx2go – Recording In/Out Times video to learn how to record daily child in/out times in the app.





Scanning

The Weekly Attendance + Meal Count forms can be scanned into Minute Menu CX. Scanning will eliminate the need to record attendance/meal counts (in the Record Attendance screen).

SETUP

Read the Getting Started Scanning help document.

Scanner(s) must be setup to meet specific scanning requirements. Please watch the Scanner Settings training video to learn how to set up the scanner to meet these requirements.

TRAINING

Specific guidelines *must* be followed when printing and filling out the forms. Use the Properly Marking Attendance and Meal Count forms document to train Staff to fill out forms correctly.

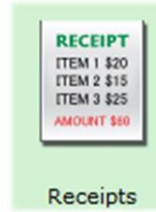
Use the Meal Counts and Attendance with Scanning e-Learning course on training.minutemenu.com to train centers.

Read scanning blog(s) located on blog.minutemenu.com.

Hint: Consider providing teachers with laminated copies of the "Properly Marking Attendance and Meal Count Forms," and keep one in *every* classroom.

Receipts

Enter Receipts (Optional)



To enter receipts into Minute Menu CX, click the Receipts icon on the dashboard. The amount of money spent on the food service (food, supplies, etc.) should be greater than or equal to the amount of money received for reimbursement by the CACFP. Entering receipts will allow centers to track expenses and run reports on those expenses.

Best Practice: Run the "Non-Profit Status Report" after receipts are entered to make sure your Center is running a non-profit food service.

Watch the Entering Receipts training video located on training.minutemenu.com to learn how to add, edit, and/or delete receipts.

To enter vendors for food/supplies, go to **Tools >> Manage Vendors**. Watch the Manage Vendors training video for more information on adding vendors.

Policy Settings

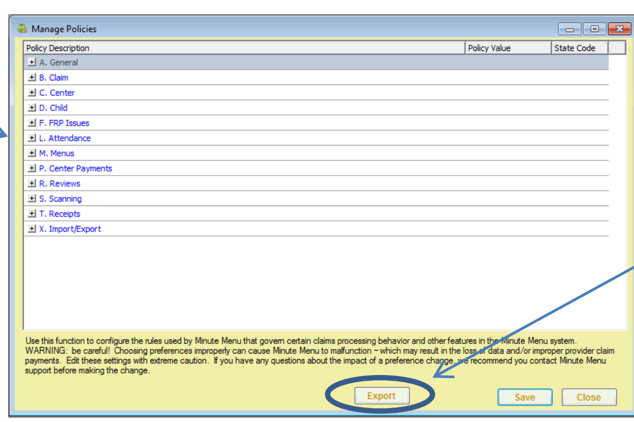
Manage Policies

The Manage Policies function in Minute Menu CX controls many aspects of the program including edit checks, user preferences, and much more. Review the policies to ensure that the program has been set up to meet the standards and expectations of your agency.

Please view the Managing Policies document on training.minutemenu.com. To view a printout of the policies, go to **Administration >> Manage Policies**, and click the **Export** option.

Policies should only be changed by the main decision makers of the company and/or those with the authority to do so.

Click the plus signs to expand a category.



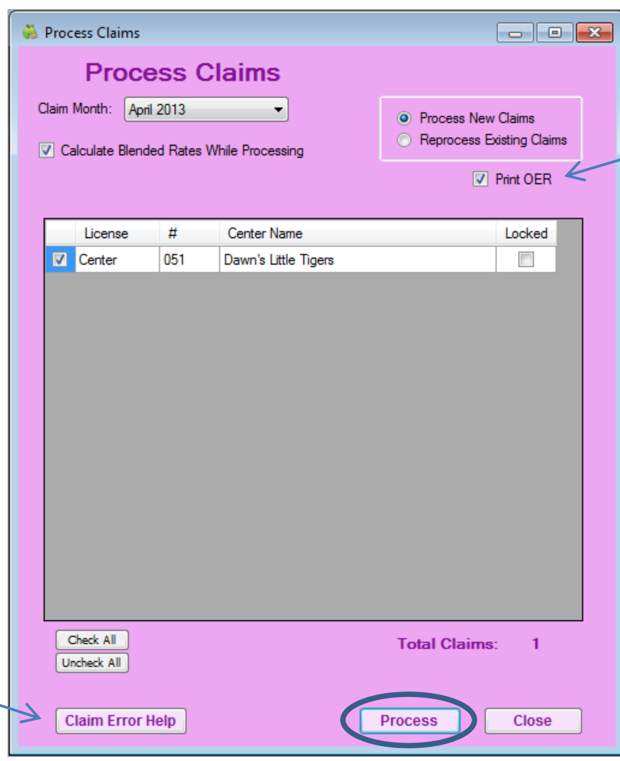
Export the data to Excel for a format that's printer friendly.

Process Minute Menu CX Claims

At the end of each month, all of the data will need to be "processed" by the software. This is how Minute Menu CX will check the data in your system to ensure that all CACFP requirements have been met. But **DON'T WORRY**! This information is NOT final until *you* say it is! After the claim is processed, changes can be made! Watch the Processing Claims training video to learn more about claims processing.

To process claims:

1. Go to **Claims>>Process Claims**.
2. Make sure that the "Calculate Blended Rates While Processing" box is checked (if this is not visible in your account, skip that step.)
3. Make sure that the "Print OER" box is also checked (the OER or **O**ffice **E**rror **R**eport will "print" to screen, not to the printer. This option will simply open the report for you to view it after processing).
4. Print or save the Minute Menu CX Claim Errors help document accessible from the bottom left corner of the process claims screen (needed for reviewing the OER).
5. Click the **Process** button



Make sure the Print OER box is checked!

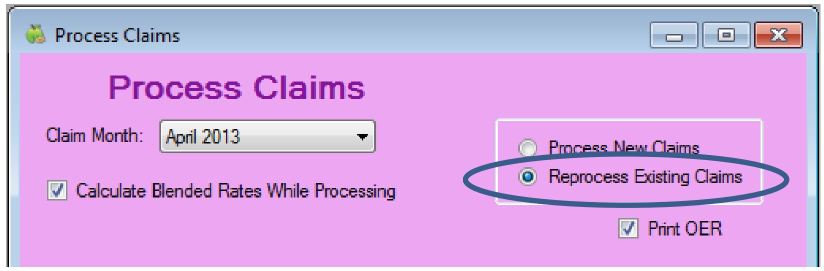
Print or save this HELP document!

Next you'll need to use the Claim Error Help document to review each of the claim errors on the OER. Each claim error has a reference number. Use the reference number to look up the error in the help document. Each and every error should be researched.

Any errors that were received due to incorrect or incomplete data can be eliminated by fixing the data and reprocessing the claim.

To reprocess the claim:

1. Go to **Claims>>Process Claims**.
2. Select the "Reprocess Existing Claims" option.
3. Place a check in the box next to the claim.
4. Click the **Process** button.



Some errors that you receive may be valid and indicate that a meal or a child should not be claimed. Centers should only accept reimbursement for meals and children that meet CACFP food program requirements.

Take the [Sponsor Monthly Process](#) four-part training course located on [training.minutemenu.com](#) to learn about each step of the monthly process including: managing data, processing claims, reviewing claims, and other monthly tasks.

Submit Claims to State

After the claim has been processed and all errors have been reviewed (and fixed as needed) the claim is ready to be submitted to the state. Use the reports in Minute Menu CX to get the data to submit to your state.

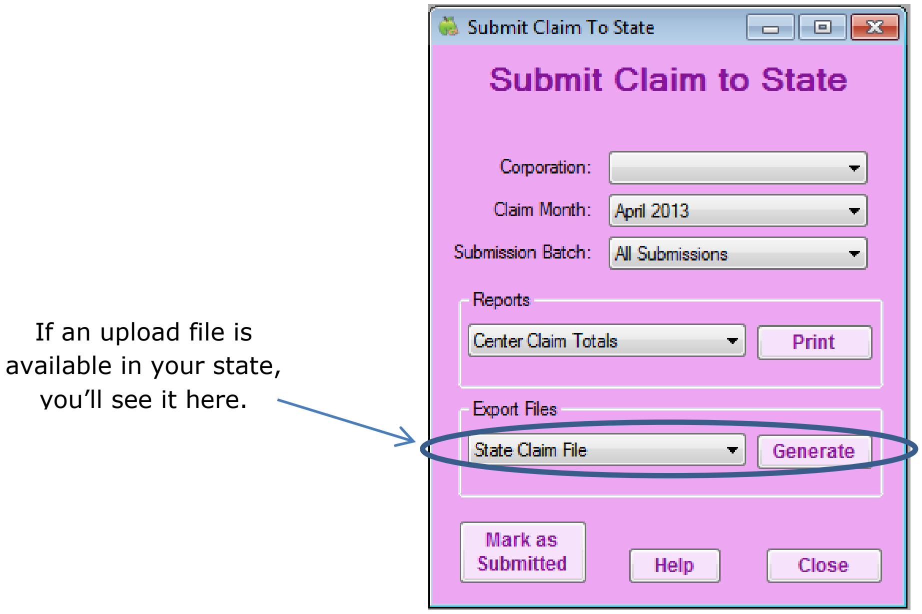
It is important to note that Minute Menu CX is not directly connected to your state in any way.

To begin the process, go to **Claims >> Submit Claims to State**.

Use these reports to get the data to enter your claim into the state website.

Select a report from the Reports dropdown box and then click **Print**. Most agencies run the State Summary report, and use that information to enter the claim into the state website.

Some states may have an export/upload file available which allows you to upload a file to your state website rather than having to manually type the numbers in. If your state has an upload file, you will see the "State Claim File" in the **Export Files** dropdown box. If an upload file is not available for the state, the field will most likely be greyed out. Click the **Generate** button to create the file, save it to your computer (in a location that you can easily find again), and then go to your state website, and upload that file.



Please review the Submitting Claims to the State help document for more information.

After the claim is submitted to the state, go to **Claims >> Submit Claims to State** and click **Mark as Submitted**. This effectively locks that claim information down, so if it is ever changed after it has been marked as submitted, those changes are tracked separately from the original claim(s).

If you have any questions, you can go to **Help >> Contact Minute Menu Technical Support** for assistance.

Resources

Minute Menu Corporate Website	www.minutemenu.com
Minute Menu Training Website	training.minutemenu.com
Minute Menu Blog Website	blog.minutemenu.com
Minute Menu Technical Support Email Address	cxhelp@minutemenu.com
Minute Menu Main Phone	(972) 671-5211
Minute Menu Fax	(972) 235-8651