

Harvest CACFP Claims Entry Training

Agenda

This training session will show the process for Creating, Entering, Submitting claims for CACFP within Harvest. We will also recap basic Harvest functions covered in earlier training sessions.

At the conclusion of this training session, CACFP Claimants should be able to:

1. Access Harvest
2. Request Harvest Credentials / Modify Existing Credentials
3. Create / Enter / Submit an CACFP Claim
4. Reopen and Revise previously processed claims.
5. Submit Helpdesk issues

How to Access the Harvest Landing Page

To access the system, please go to: <https://harvest.education.vermont.gov>

Users who had credentials under the previous Child Nutrition Management System will have their UserIDs converted to Harvest. These existing users must use the Forgot Password process to reset their passwords.

Users who did not have credentials for the previous Child Nutrition Management System must request new credentials via the New User process. Steps for obtaining a New UserID include:

1. Click on the New User link
2. Search for, and select the Organization for which you work
3. Select the role you are requesting (usually Data Entry)
4. Submit your request to AOE for review
5. You will receive an email with a temporary password within 48 hours if your request is approved by AOE.
6. Log on with your UserID and temporary password
7. Complete the process of changing your password
8. You should reach the Harvest Dashboard page

Accessing Claims within Harvest

To access claims, click the Claims menu shown in the image below.

The current Program Year will display (based on a 7/1 – 6/30 program year) in the drop down to the left. This drop down can be changed to retrieve prior years claims. CACFP operates on a 10/1 – 9/30 program year, although claim rates change effective July 1st.



For the current Program Year, programs where the Sponsor has an approved application for that program year will display, along with claim months available.

Click the month for which you want to access the claim.

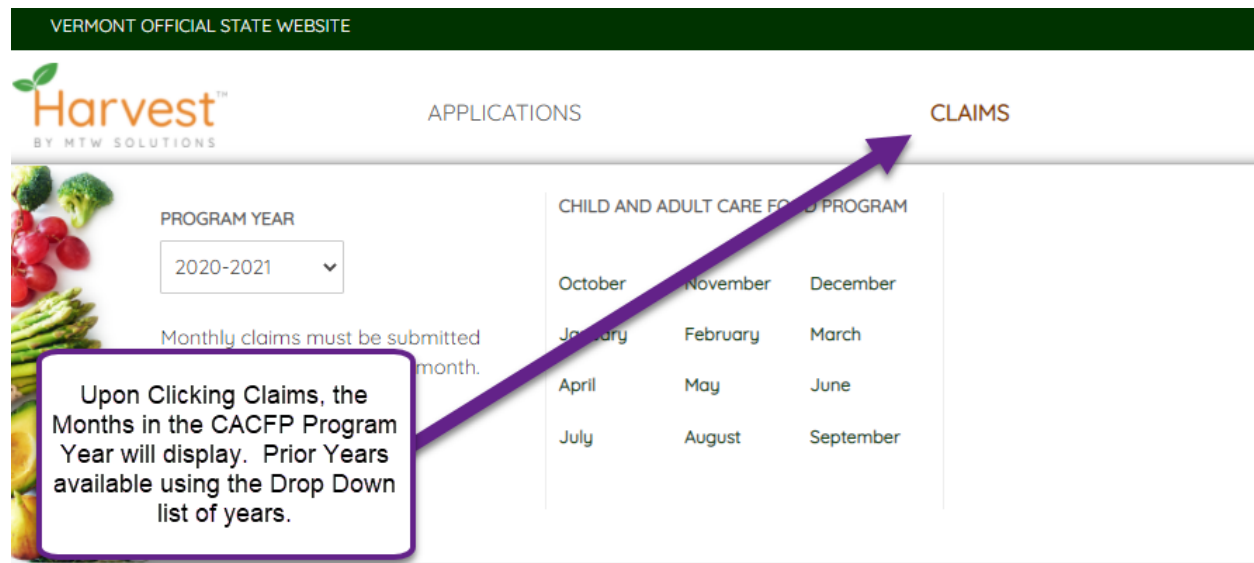


Image 1 – Claims Menu

Below the list of months, each program will display a Yearly Summary that shows each month through the year, the details of that claim, including payment amounts, revisions, and Vision Voucher Numbers. This Summary will be available in late 2021.

Claims Actions and Messages

Create Claim – Unauthorized Message

If you click a month for which the claim has not yet been created, and your account does not have the access to create a claim in Harvest, you will receive the following message:

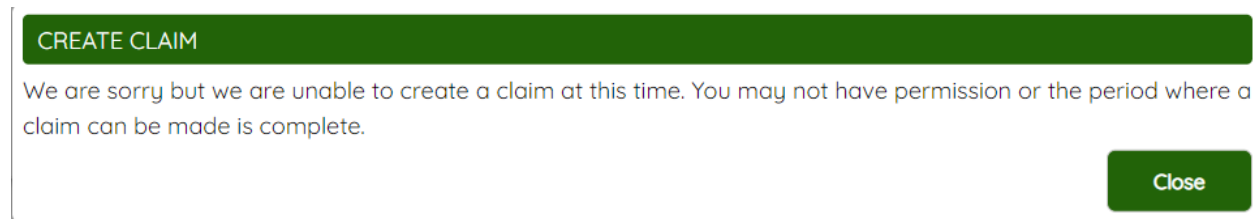


Image 2 – Create Claim Not Allowed Message

Create Claim

Upon clicking a month for which a claim has not already been created, a message box will appear asking to confirm if you want to Create Claim for that month. Clicking Yes will create and open the Sponsor claim for that month. Clicking No will result in no claim being created, and the grid of months will continue to display.

Reopen a Claim

Once a claim has been submitted, but has not yet been sent to the State Payment System (or paid), the claim can be Reopened by the Sponsor to make modifications. This differs from a claim Revision. If it is Reopened, the submission to the state is canceled. Reopened claims must be resubmitted in order to be reviewed. The following image illustrates the Reopen prompt.

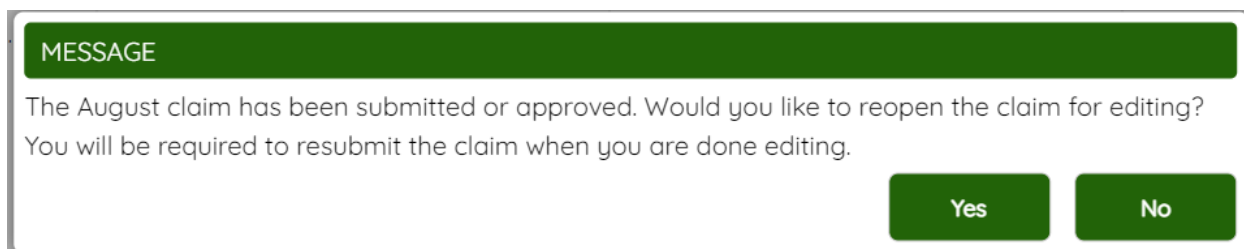


Image 3 – Reopen a Claim

Revise a Claim

After a claim has been submitted, and that claim has been forwarded to the State Payment System (or paid), that claim can no longer be Reopened, but rather can be Revised. The prior claim revision will display, allowing the Sponsor to add more sites, or modify existing sites on the claim month. The new total amount will display, but only the variance between the prior revision, and the current revision will be paid. If the amount of the revision is less than the prior revision, an Offset will be created to be withheld against future claims.

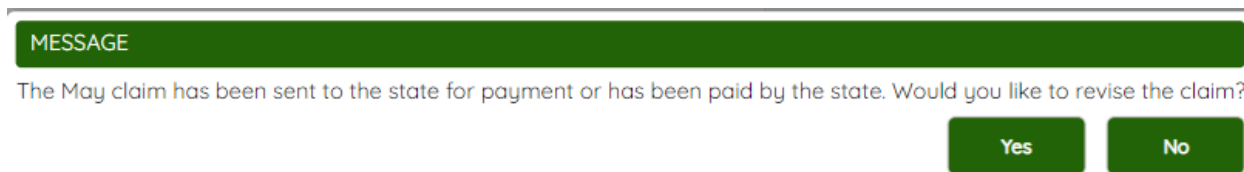


Image 3b – Revise a Claim

Access Levels – Edit vs. View

Viewing a claim does not allow any updates to be saved. Viewing occurs when a user does not have authority to Save claims, or if when prompted “Do you want to Revise your claim?”, and the user clicks No, the claim will open in View Mode.

Clicking Open or Start will enable updates to be saved to the claim. Make sure to resolve any error messages after clicking Save (if any) so that your updates are saved to the Harvest database.

Entering a CACFP Claim

CACFP Claims are entered at the Center / DCH Provider Level. Most Sponsors have either Centers, or DCH Providers. A few Sponsors/Organizations have both Centers and DCH Providers.

Most Sponsors may have approved applications for multiple centers / DCH Providers, while others have an approved application for only a one. The Sponsor should enter the claim amount

for each center/DCH Provider, and then return to the Main Claim level (Sponsor Level) in order to Certify/Submit the claim at the Sponsor level.

The tabs at the Sponsor Level include:

- Site Listing (Sites refer to Centers, DCH Providers, or both)
- Acknowledgement and Certification

Actions on the Site Listing Page

Once a claim has been accessed, the first page (Site Listing) will display. Users who do not have access to create or update a site will see “View” as an option after the Sponsor has created a claim for that site. For users with the authority to create or update a site claim, they have the option to click “Start” (create) or “Open” (update) for each site, one at a time. The site listing validates against the site applications. If a site application does not provide service during a month (e.g., July), the site will show “Ineligible” for that month.

Once a site has been accessed in CACFP, the only page to be completed is the Site Claim page. Other programs may have multiple pages, but CACFP only has the single Site Claim page.

The sections that display on the Site Claim page depend on the programs the Site is participating in according to the Application Revision that is approved at the time the Sponsor Level Claim is created.

If an application revision is needed in order to complete a claim, the Sponsor can:

1. Delete the entire Sponsor claim, and start it again after the Application Revision is approved
2. Submit the claim without the content related to the Application Revision. After submission, if the Sponsor Reopens or Revises the claim, that Reopened/Revised claim will be connected with any newly approved application revisions.

From the Site Claim page, click the “Return to Claim” link in the top right section to return to the Site Listing, where additional sites can be completed until all sites are complete.

The site level pages are not submitted. Rather, the claim is submitted at the Sponsor level on the Acknowledgement and Certification page.

The images on the following pages illustrate sections that may be required to be completed, based on the programs provided by that site.

CACFP – Site Listing

[Redacted] - CACFP August Claim for Program Year 2020-2021

Claim

[Redacted] August Claim for Program Year 2021 Status: Paid by State

ADMINISTRATIVE REIMBURSEMENT

Number of Providers (Max 50) claimed at \$126.0000 X 50 Admin Earnings: \$6,300.00

Number of Providers (51 - 200) claimed at \$96.0000 X 62 Admin Earnings: \$5,952.00

Total Meal Count: 38,835 Total Amount: \$74,338.67

Site Name	License Type	Status	Meal Count	Amount	Action
[Redacted]	Center	Not Started	0	\$0.00	
[Redacted]	Center	Not Started	0	\$0.00	
[Redacted]	Center	Not Started	0	\$0.00	
[Redacted]	Home	Opened	330	\$529.04	Open
[Redacted]	Home	Not Started	0	\$0.00	
[Redacted]	Home	Opened	423	\$687.47	Open
Totals			38,835	\$62,086.67	

Image 4 – Listing of CACFP Sponsor Sites (DCH Providers)

On this Site Listing Page, Centers, DCH Providers (Home), are listed. For Sponsors claiming for DCH Providers, an Administrative Reimbursement is added to the claim based on the number of DCH Providers being claimed during that month.

The amount claimed for each site is listed and totaled on the Site Listing Page.

CACFP – DCH Provider Claim

██████████ - CACFP August Claim for Program Year 2020-2021

Site Claim

Day Care Homes

PROVIDER REPORTING AS: TIER I

SITE OPERATIONS

Number of Days Meals Served Average Daily Attendance

22

6

Meals Served

Amounts are calculated by multiplying the Meals Served by the Rate (Amount = Meals Served * Rate).

MEALS SERVED - TIER I

Meal Type	Meals Served	Rate	Amount
Breakfast	92	1.4000	128.80
Lunch	116	2.6300	305.08
PM Snack	122	0.7800	95.16
Totals	330		529.04

Image 5 – DCH Provider Claim

Factors for each DCH Provider will impact rates and other fields displayed on the Site Claim page. Tier I, Tier II, and Tier II Mix are an example of such a factor.

CACFP – Center Claim

Adult Day Center - CACFP August Claim for Program Year 2020-2021

Site Claim

Center

ADULT DAY CARE ATTENDANCE

Days of Operation	Total Attendance	Average Daily Attendance	Number of Shifts
22	289	14.00	1

ADULT DAY CARE CENTER ENROLLMENT

Enrollment % is calculated by dividing the enrollment entered for the category by the total enrollment.

Category	Enrollment	Enrollment %
Free	22	70.97
Reduced	0	0.00
Paid	9	29.03
Totals	31	100.00

Adult Day Care Meal Entry

Amounts are calculated by determining enrollment percentages of the Total Meal Count, and multiplying each by the Rate (Amount = Free/Reduced/Paid % of Total Count * Rate).

AM SNACK (ADULT MEALS)

Category	Meal Count	Rate	Amount
Total Meal Count	179		
Free	127	1.0000	127.00
Reduced	0	0.5000	0.00
Paid	52	0.0900	4.68

Image 6 – Center Claim – Top Portion

LUNCH (ADULT MEALS)

Category	Meal Count	Rate	Amount	CIL Rate	CIL Amount	Total
Total Meal Count	237					
Free	158	3.6600	578.28	0.2600	41.08	619.36
Reduced	0	3.2600	0.00	0.2600	0.00	0.00
Paid	79	0.3500	27.65	0.2600	20.54	48.19
Totals			605.93		61.62	667.55

Operating Expenses

Category	Amount
Food	1361.62
Supplies	78.41
Program Labor	1562.18
Administrative Costs	128.96
Other Costs	0
Total Operating Expenses	3131.17

Image 7 – Center Claim – Bottom Portion

At the bottom of the Site Claim Page, a “Save Page” button will display for users authorized to update claims. Upon clicking Save Page, the page will ensure that all required fields are completed, and any amounts entered are within limits of the approved application revision.

Many fields are automatically calculated based on counts being entered. Tabbing to the next field will result in those calculations being performed. Please do not attempt to enter data into calculated fields.

Any error messages must be resolved, and re-saved, before any data will be saved on the Site Claim page. If you leave the Site Claim page, or timeout without having resolved those errors, the page will not record any updates made since the last successful save.

Submitting a CACFP Claim

Once all Sites for the month have been entered and saved, proceed to the Acknowledgement and Certification page. To Submit the claim, you must:

1. Check the checkbox agreeing to the certifications.
2. Click the “Accept & Submit” button.

The screenshot shows a form titled "Acknowledgement And Certification". At the top, there are two tabs: "Claim" and "Acknowledgement And Certification". Below the tabs, there is a checkbox with a blue checkmark and the text: "This is to certify that this organization intends that all electronic signatures executed by our employees, agents, or representatives, located anywhere in the world, are legally binding equivalent of traditional handwritten signatures. By checking the box, this organization is certifying by electronic signature that neither the organization nor its principals/authorized representatives is presently debarred, suspended, proposed for debarment, declared ineligible, disqualified, or voluntarily excluded from participation in this transaction by any Federal/State Authority." Below this is a paragraph: "I certify under penalty of perjury that the information on these claim forms is true and correct, and I will immediately report to the State any changes that occur to the information submitted. I understand that this information is being given in connection with receipt of federal funds. The State may verify information and the deliberate misrepresentation of information will subject me to prosecution under applicable federal and state criminal statutes." Below that is another paragraph: "On behalf of the organization, I hereby agree to comply with all state and federal laws and regulations governing the Child Nutrition Programs administered by the State. In accordance with Federal law and U.S. Department of Agriculture policy, this organization does not discriminate on the basis of race, color, national origin, sex, age or disability. I will ensure that all monthly claims for reimbursement are true and correct and that records are available to support these claims." At the bottom left, there is a green button with the text "Accept & Submit" and a right-pointing arrow.

Image 8 – Submitting a Claim

Notifications

The individual who submits the claim for the Sponsor will receive an email notification upon approval of the claim.

Accessing Help through Harvest

In the top right of each Harvest page, a question mark indicating Application Help is displayed. Click on Contact Support, which will open a separate browser tab to enter the subject and text of a message to go to AOE. If you encounter an error message, please paste the text of that error message into the body of the message to expedite resolution of the issue you encountered.