



*"Bringing computing ease to your student record
needs"*

DOCUMENTATION

~LUNCH~

JMC Inc
PO Box 328
Lake City, MN 55041

Telephone: 1-800-524-8182
Fax: 1-651-345-2215

Web: <http://www.jmcinc.com>
Email: support@jmcinc.com or sales@jmcinc.com

Documentation and program copyright © 2007

Table of Contents

JMC Lunch Overview	4
Getting Started	4
Installing the Software	4
Defining the Pricing Groups	4
Defining the Items and Prices	4
Defining the Low Balance Indicator.....	4
Setting Up the Student and Staff Accounts	5
Setting Up the Family Accounts	5
Setting Up Users and Passwords for POS Personnel	5
Install JMC POS Application on all POS Computers	6
Train the POS Staff on the Use of the POS Application ...	6
Parent Access to Lunch Account Transactions & Balances	6
Ongoing Maintenance	7
Account Maintenance for Staff, Teachers, and Students ...	7
Back Up the JMC Data Folders Regularly	7
Modifications During the Current Year	7
 Common Tasks	 8
Finding a student	8
Selecting a group of students	8
Resuming printing that had been interrupted	9
 Documentation for Office Lunch Module	 10
Data-Edit Student Lunch Data	10
Data-Edit Family Lunch Data	15
Data-Edit Adult Cash Account	17
Data-Edit Student Cash Account	18
Data-Determine Free or Reduced Status	18
Data-Eligibility Notification Letter	20
Data-Edit Pricing Groups	22
Data-Edit Meal Prices	23
Data-Edit A La Carte Prices	25
Data-Edit Low Balance Limit	26
Data-Import Account Balances from Prior Year	27
Data-Import Free and Reduced Status from Prior Year	27
Data-Initialize Family Lunch Contacts	28
 Reports-Meals Served	 29
Reports-A La Carte Items Served	30
Reports-Lunch Status	31
Reports-Balance Sheet	32
Reports-Low Balance Notices	33

Reports-Summary	35
Reports-Reimbursements	36
Reports-Claims Edit Check	37
Reports-Print Barcodes	39
Starting the JMC Point of Sale Application	41
Documentation for JMC POS Application - Macintosh	43
POS-File-Reprocess Transactions	43
POS-Begin Breakfast Button	44
POS-Begin Lunch Button	46
POS-Clear Alias Button	47
Documentation for JMC POS Application - Windows	48
POS-File-Reprocess Transactions	48
POS-Begin Breakfast Button	49
POS-Begin Lunch Button	51
POS-Clear Alias Button	52
Appendix A: Using Credit Cards for Lunch Account Deposits	53

JMC Lunch Overview

A fine new addition to the JMC Office Application is the ability to keep track of lunch and breakfast purchases and accounts. The Lunch module of the JMC Office Application works in conjunction with the JMC Point Of Sale (POS) Application to allow real-time transactions to be posted to accounts.

The **basic tasks and reports** for the lunch software options are:

- setting up accounts, prices, and a la carte items in the office
- performing Point Of Sale (POS) transactions
- printing reports and maintaining accounts in the office

Getting Started

Installing the Software

In the office, make sure the JMC Office Application has been installed for all persons who will be handling lunch account transactions and reports. Also, make sure that all persons who will be handling lunch account transactions and reports have been assigned the appropriate access privileges to the Lunch module of the JMC Office Application. To establish or modify access for a user, select File-User Privileges from the JMC Office Application. In some cases account maintenance may need to be performed on your school's server to allow access to the data. For the lunch room computer(s), the JMC POS Application must be installed and have access to the JMC data folders. If the lunch module is not available in your JMC Office Application or you do not have the JMC POS Application, please contact JMC.

Defining the Pricing Groups

The pricing groups need to be established for the various grade ranges. This is especially important if the meal or a la carte item prices are to be different for some buildings or grade levels.

Defining the Items and Prices

Defining the prices and a la carte items must be done before any transactions can be processed. Costs for meals must be entered, including any contributions from the state or federal governments for each meal or meal item sold. Also, a la carte items must be named and priced. If more than one pricing group has been established, then these prices must be entered for each pricing group.

Defining the Low Balance Indicator

The low balance indicator is set in the office and will affect the transactions at the Point of Sale. During POS transactions, if a student's account balance falls below the Low Balance Indicator amount a warning will appear on the POS computer screen.

Setting Up Student and Staff Lunch Accounts

The accounts for students and staff will need to be established. Most students will already be in the JMC data for the current year; however, new students will need to be added to the database before they can use their lunch accounts. Also, students' lunch status (free, reduced, or regular) must be set on the Lunch-Data-Edit Student Lunch Data screen.

Teachers and other school staff members that choose to purchase lunches using an account will need to be assigned a student number in the JMC Office Application. Select Edit-Enter Student Data to add new accounts.

Setting Up Family Accounts

The accounts for families will need to be established if lunch transactions for a family are to be drawn from one central account. To set up family lunch accounts, the lunch contacts may be set individually on the Edit-Edit Student Data screen or en masse using the Lunch-Data-Initialize Family Lunch Contacts option. The Lunch-Data-Initialize Family Lunch Contacts option will create a lunch contact, based upon primary contacts, for all students who do not yet have a lunch contact.

Deposits can then be made into the lunch contacts' lunch accounts on the Lunch-Data-Edit Student Lunch or Lunch-Data-Edit Family Lunch screens.

Deposits would normally be put into the family lunch account rather than the student's lunch account. However, if a student has an account balance in their student lunch account and their lunch contact also has a balance in the family lunch account, funds will be taken from the student account first to cover transactions. Once the student account is reduced to a zero balance, the student's POS meal transactions will cause a transfer of funds from the family account to cover the cost of their purchases. Therefore, there is no need to refund an existing balance from a student lunch account when establishing a family lunch account for that student's family.

Setting Up Users and Passwords for POS

The user accounts for POS personnel must be set up in advance. To establish or modify access for a user, select File-User Privileges from the JMC Office Application. Each time the POS Application is started up the user will be asked to log in with their user name and password. All transactions from the POS computer will be denoted as having been performed by the user who was logged in at the time of the transaction.

Office staff may need to be granted specific user privileges in order to view or edit lunch data, such as record deposits, change student lunch status, or generate lunch reports. The two user privileges that govern the ability to view and edit lunch data are Lunch and Sensitive.

Install JMC POS Application on all POS Computers

The JMC POS Application must be installed on each POS computer. Normally all POS computers are connected to the network since they will be processing transaction files over the network. Additional keyboards and/or keypads may be desirable to help facilitate the checkout process at the Point of Sale.

Train the POS Staff on the Use of the POS Application

Although the JMC POS Application is designed to be quick and simple to use, some familiarity with the computer keyboards and/or keypads and required keystrokes would be very helpful before attempting to process transactions during a busy school meal session. POS staff will need to know the procedures for working with students (getting their JMC student number, dealing with low balances and charges, etc.).

Parent Access to Lunch Account Transactions and Balances

Schools that have purchased the Online Parent feature of the JMC Office software will have the ability to post lunch transactions and account balances online for parents to access. Parents will need to be designated as the Lunch contact for all pertinent students and will need to have a login password assigned in the JMC Office Application. The parents' passwords may be assigned under Attendance-Contacts-Edit Contacts.

Ongoing Maintenance

In addition to getting the accounts, prices, computers, and procedures established for the new school year, other phases of working with lunch transactions will need to be addressed as the school year progresses.

Account Maintenance for Staff, Teachers, and Students

Adding and modifying accounts, passwords, student lunch status (free and reduced lunches), and entering deposits will be necessary at various times throughout the year. Mailings may be periodically generated to inform parents of low balances in student and family accounts.

Back Up the JMC Data Folders Regularly

Although it has always been important to make regular backups for maintaining accurate data for the JMC suite of software, having good backups becomes more important than ever now that your school will be tracking deposits, refunds, and purchases. It is advised that your school establish a regular backup procedure.

Modifications During the Current Year

A la carte items should not be moved within the A La Carte Prices table once purchases have been made using this table. New a la carte items should be added to the end of the list. Price changes may be made at any time during the year; however, price changes do not affect past transactions. Student lunch statuses may also change during the year.

Common Tasks

Finding a student:

Find a student to be edited in one of these ways:

Enter the student's number in the **Find** box (usually located in the lower right corner of the screen).

- The student's data will display for editing.

Start entering the student's last name in the **Find** box.

- Student data will display as letters are entered.
- As soon as the student's data is displayed, you may stop entering letters.
- If the student displayed is close to the desired student, the scroll bar may be used to move to the desired student.

Use the scroll bar to display the student's data.

- Data will scroll in alphabetical order by student last name.

Using the scroll bar:

Click on the **up** arrow to move one student backward in the alphabet.

Click on the **down** arrow to move one student forward in the alphabet.

Click in the **grey area** above the box to move 10 students backward.

Click **below** the box to move 10 students forward in the alphabet.

Drag the box in the scroll bar to move to another position in the alphabet.

Selecting a group of students:

Select a group of students using one of the following methods:

Sequential

1. Click the **Sequential** button.
2. Enter the desired range of student numbers in the **From** and **To** fields.

The report will print in alphabetical order for the requested range of student numbers.

Random

1. Click the **Random** button.
2. Select a student.
3. Click **Add** when the correct student is highlighted.

Selected students will appear in **Students to Print** field.

By Grade

1. Click the **By Grade** button.
2. Enter the range of grades to be printed in the **From** and **To** fields.

By Advisor

1. Click the **By Advisor** button.
2. Enter the range of advisor numbers to be printed in the **From** and **To** fields.

A list of advisors with their numbers can be found under Attendance-Staff-Teachers/Rooms.

By Course

1. Select the course.
2. Select the term.

Resuming printing that had been interrupted.

Do not make an entry in the **Pick up #** field unless printing was interrupted. If interrupted, printing may be resumed from where the interruption took place.

1. To resume printing, select the same printing options as before the interruption.
 2. Enter the number of the student for whom the report was being printed when the interruption took place. Printing will resume starting with that student.
-

Documentation for Office Lunch Module

Lunch—Data—Edit Student Lunch Data

This selection is used to maintain account information for student lunch accounts. Deposits, refunds, status changes, and some reports may be accomplished from this screen. If the student has a lunch contact assigned to them, then the lunch contact's name and account balance will also be displayed.

Note: Since JMC student numbers are needed for JMC lunch account transactions, adults must be entered as a student in the database in order for them to have a lunch account. Students may be added by using [File-Enter Student Data](#).

1. Select Lunch—Data—[Edit Student Lunch Data](#).

The screenshot shows the 'Student Lunch Data' window. At the top, it displays student information: Student # 50, Name Aaron, Aaron, Grade 12, Birth Date (Age) 01/01/2002 (5). Below this, it shows Lunch Contact Name Aaron, George & Gracie. The Lunch Status is set to 'Paying Student'. The Family Balance is \$ 75.55 and the current Balance is \$ 0.00. There are buttons for 'Deposit... %D', 'Refund... %R', and 'New... %N'. A checkbox for 'Allow Charges' is checked, and there is an 'Allowed Purchases...' button. The main part of the window is a table with columns: Date, User, Transaction Type, Purchase, Status, Amount, and Balance. The table lists various transactions from 08/22/2007 to 08/23/2007, including purchases of Student Juice, Student Toast, Student Lunch, Student Extra Milk, Student Meat, Ice Cream, Student Breakfast, and Student Potatoes, along with transfer entries. At the bottom, there are buttons for 'Print Receipt', 'Print Notice', 'Delete', 'Print Trans', 'Save %S', 'Done', and a 'Find:' search box.

Date	User	Transaction Type	Purchase	Status	Amount	Balance
08/22/2007	Mary		Student Juice		\$ -0.25	\$ -1.60
08/22/2007	Mary		Student Toast		\$ -0.25	\$ -1.85
08/22/2007	Mary	Transfer: Aaron, George & Gracie			\$ 1.85	\$ 0.00
08/22/2007	Mary		Student Lunch	P	\$ -1.60	\$ -1.60
08/22/2007	Mary		Student Extra Milk		\$ -0.25	\$ -1.85
08/22/2007	Mary		Student Meat		\$ -0.75	\$ -2.60
08/22/2007	Mary		Ice Cream		\$ -0.60	\$ -3.20
08/22/2007	Mary	Transfer: Aaron, George & Gracie			\$ 3.20	\$ 0.00
08/23/2007	Mary		Student Breakfast	P	\$ -1.10	\$ -1.10
08/23/2007	Mary		Student Extra Milk		\$ -0.25	\$ -1.35
08/23/2007	Mary		Student Meat		\$ -0.75	\$ -2.10
08/23/2007	Mary		Student Juice		\$ -0.25	\$ -2.35
08/23/2007	Mary	Transfer: Aaron, George & Gracie			\$ 2.35	\$ 0.00
08/23/2007	Mary		Student Lunch	P	\$ -1.60	\$ -1.60
08/23/2007	Mary		Student Extra Milk		\$ -0.25	\$ -1.85
08/23/2007	Mary		Student Potato		\$ -0.35	\$ -2.20
08/23/2007	Mary		Ice Cream		\$ -0.60	\$ -2.80
08/23/2007	Mary	Transfer: Aaron, George & Gracie			\$ 2.80	\$ 0.00

Figure 1: Edit Student Lunch Data screen.

2. Select the student to be edited (see **Common Tasks** on page 8 of this document for more details on selecting students).

Lunch Status To modify the lunch status of a student, select an option from the **Lunch Status** menu. You will then be prompted to enter the effective date for this status change. Depending upon the date entered and the transactions posted for the

student, the amount a student was charged for a prior lunch purchase may be altered during this process. This could also affect their lunch account balance.

Available lunch status options are:

- Paying Student
- Free Student
- Reduced Student
- Paying Adult

Note: Users of the JMC Office Application must be granted access to Sensitive data in order to see or edit the lunch status for a student. To check your user privileges, select File-Who Am I. Contact your JMC Administrator for modifications to your user privileges.

Note: Adults must be entered as a student in the database in order for them to have a lunch account. Students or adults may be added by using Edit-Enter Student Data.

Note: Adults should be assigned a grade level that will place them in the proper pricing group. Grade levels may be assigned by using Edit-Enter Student Data.

Allow Charges To change the charge status for a student, click on the **Allow Charges** checkbox.

Deposit To enter a deposit in the office for a lunch account, click **Deposit**, select Family Account or Student Account (default is Family if student has a lunch contact assigned, otherwise this option is not displayed), enter the date (default is today's date), specify amount of the deposit, select cash or check (default is check), and then click **OK** to complete the transaction. Figure 2 shows how the screen will appear once the **Deposit** button has been clicked.

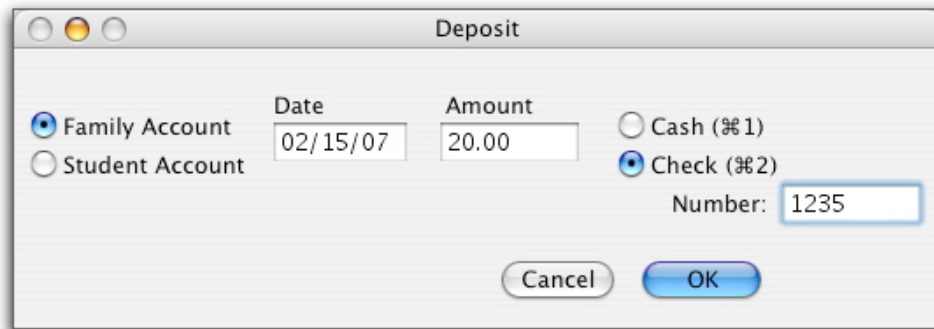


Figure 2: Deposit Dialog for Edit Student Lunch Data screen.

Note: If a student has an account balance in their student lunch account and their lunch contact also has a balance in the family lunch account, funds will be taken from the student account first to cover transactions. Once the student account is reduced to a zero balance, the student's POS meal transactions will cause a transfer of funds from the family account to cover the cost of their purchase.

Refund To issue a refund in the office (e.g. for reconciling any overages from student lunch transactions at the Point of Sales) click **Refund**. A screen will appear

similar to Figure 2. Enter the date (default is today's date), amount of the refund, select cash or check (default is check), and click **OK** to complete the transaction.

New To create a new lunch status record, click **New**. A screen will appear similar to Figure 3. Then enter the data (date and record type), and click **OK** to create the record.

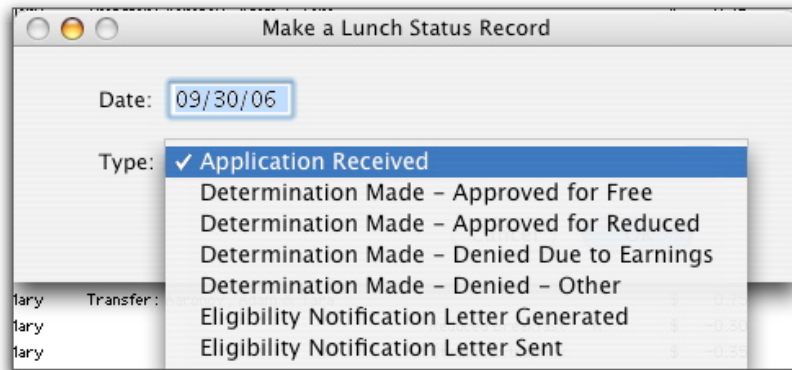


Figure 3: Making a new lunch status record for a student account.

Allowed Purchases To edit the items that a student is allowed to purchase for a student, click **Allowed Purchases**. The screen will appear similar to Figure 4.

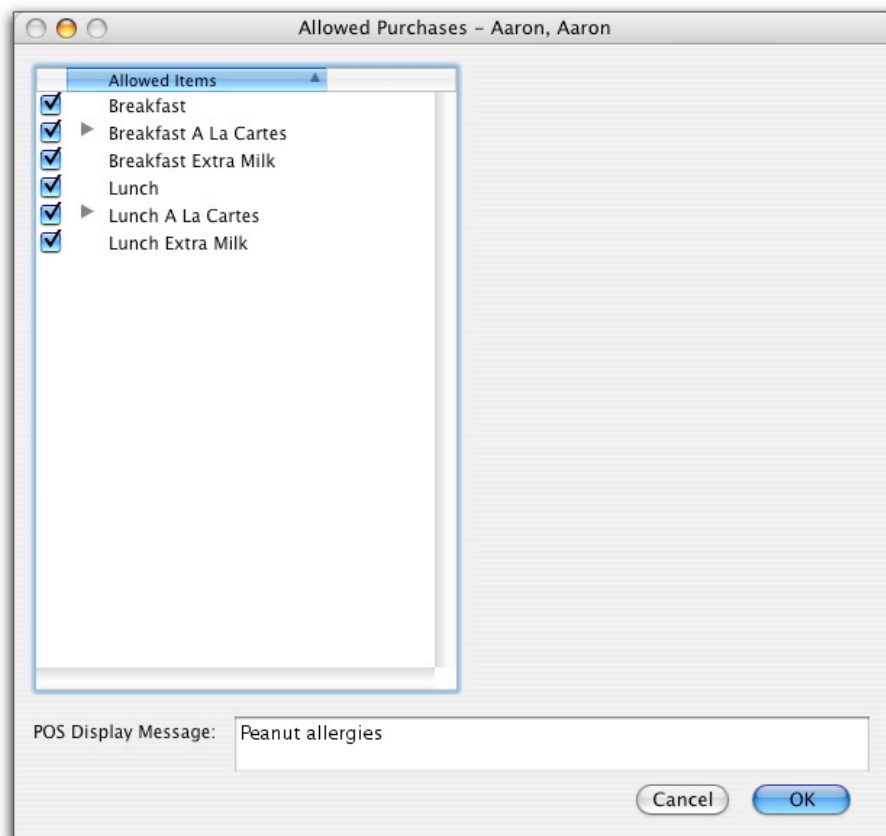


Figure 4: Editing a Student's Allowed Purchases

To display the items within an A La Cartes category, such as Lunch A La Cartes, click on the disclosure triangle to the left of that category. The screen will appear similar to Figure 5.

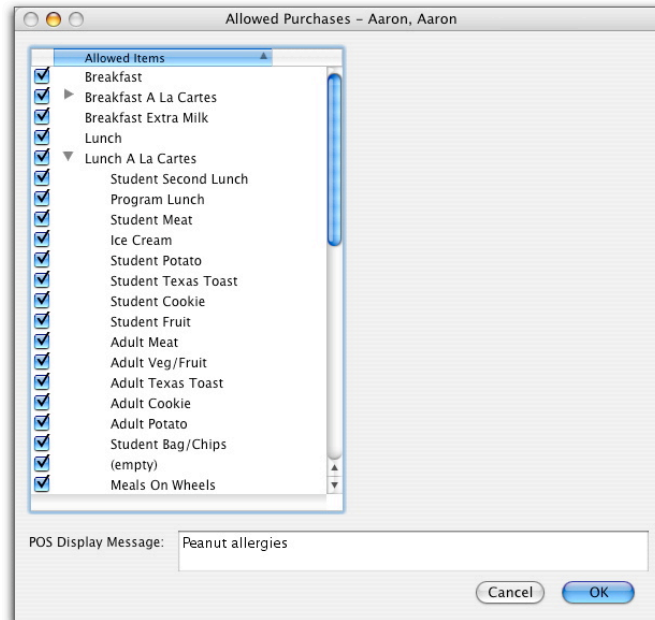


Figure 5: Displaying Items from an A La Cartes Category

Any item on this screen may be checked or unchecked, thus controlling the purchases that a student may make at the Point of Sale. In the example listed in Figure 6, the student will not be allowed to purchase any breakfast items or the Lunch A La Cartes item “Student Cookie.”

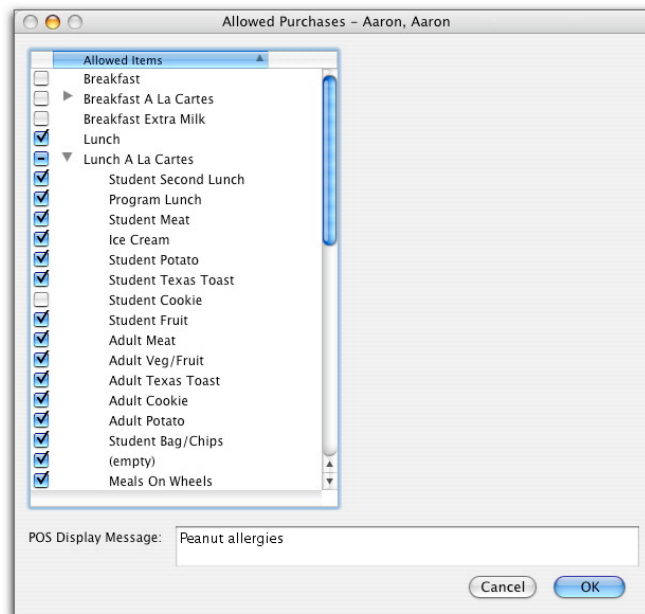


Figure 6: Example of Editing a Student’s Allowable Purchases

POS Display Message To edit the Point of Sale message for a student, click **Allowed Purchases**. The screen will appear similar to Figure 4. Enter a short message that will display at the Point of Sale when the student is making a purchase.

Current Balance This item is not editable. To affect a change to the current balance of the account, use the **Deposit** and **Refund** buttons.

Delete To delete a transaction, click on the transaction in the list you wish to delete and then click **Delete**.

Print Receipt To print a receipt for any deposit listed on this screen, first click on a deposit transaction in the list to select it and then click **Print Receipt**.

Print Trans To print a list of all transactions listed on this screen, click **Print Trans**.

Print Notice To print a notice for the student lunch account listed on this screen, click **Print Notice**. You will then be prompted to enter/edit the message that will be included in the notice. The resulting notice will contain this message along with the student's current student lunch balance.

Note: The notice will not print from this screen if the student has a designated lunch contact. In this case, the notice may be printed from the Lunch-Data-Edit Family Lunch Data screen. Printing the notice from the Edit Family Lunch Data screen will give a potentially more accurate picture of the student's and family's lunch account balances.

Save To save changes to the screen, click **Save**.

Done To exit the screen and return to the main screen of the JMC Office Application, click **Done**. If changes have been made that have not been saved, a dialog box will appear asking whether the changes should be saved.

Lunch—Data—Edit Family Lunch Data

This selection is used to maintain account information for family lunch accounts. Deposits, refunds, status change records, and some reports may be accomplished from this screen. Students who have this contact designated as their lunch contact will be displayed at the top of the screen.

1. Select Lunch—Data—Edit Family Lunch Data. A screen will appear similar to Figure 7.

The 'Family Lunch Data' window displays the following information:

- Family Lunch Contact:** Adam & Tara Aaronov, 123 4th St., Sometown, MN 55555
- Students with this Lunch Contact:** Aaronov, Aaron; Aaronov, Annette
- Current Balance:** \$ 45.10
- Buttons:** Deposit...⌘D, Refund...⌘R, New...⌘N, Print Receipt, Print Notice, Delete, Print Trans, Save ⌘S, Done, Find: []
- Transaction Table:**

Date	User	Transaction Type	Student	Amount	Balance
08/23/2006	JMCAD	Deposit Check # 1234		\$ 50.00	\$ 50.00
09/01/2006	JMCAD	Application Received			
09/30/2006	JMCAD	Determination Made - Approved for Reduced			
09/30/2006	JMCAD	Eligibility Letter Generated			
09/30/2006	JMCAD	Eligibility Letter Sent			
01/02/2007	Mary	Transfer	Aaron Aaronov	\$ -0.30	\$ 49.70
01/02/2007	Mary	Transfer	Aaron Aaronov	\$ -0.75	\$ 48.95
01/03/2007	Mary	Transfer	Aaron Aaronov	\$ -0.30	\$ 48.65
01/03/2007	Mary	Transfer	Aaron Aaronov	\$ -0.75	\$ 47.90
01/04/2007	Mary	Transfer	Aaron Aaronov	\$ -0.65	\$ 47.25
01/04/2007	Mary	Transfer	Aaron Aaronov	\$ -0.75	\$ 46.50
01/05/2007	Mary	Transfer	Aaron Aaronov	\$ -0.65	\$ 45.85
01/05/2007	Mary	Transfer	Aaron Aaronov	\$ -0.75	\$ 45.10

Figure 7: Edit Family Lunch Data screen.

Deposit To enter a deposit in the office for a family lunch account, click **Deposit**, select account, enter the date (default is today's date), specify amount of the deposit, select cash or check (default is check), and then click **OK** to complete the transaction. Figure 8 shows how the screen will appear once the **Deposit** button has been clicked.

The 'Deposit' dialog box contains the following fields and options:

- Date:** 02/14/07
- Amount:** 20.00
- Transaction Type:** ☐ Cash (⌘1), ☒ Check (⌘2)
- Number:** 1234
- Buttons:** Cancel, OK

Figure 8: Deposit Dialog for Edit Family Lunch Data screen.

Refund To issue a refund in the office click **Refund**. A screen will appear similar to Figure 8. Then enter the data (default is today's date), amount of the refund, select cash or check (default is check), and click **OK** to complete the transaction.

New To create a new lunch status record, click **New**. A screen will appear similar to Figure 9. Then enter the data (date and record type), and click **OK** to create the record.

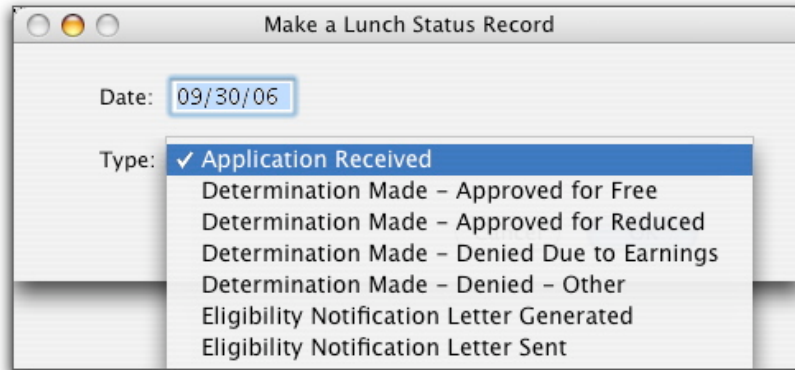


Figure 9: Making a new lunch status record for a family account.

Current Balance This item is not editable. To affect a change to the current balance of the account, use the **Deposit** and **Refund** buttons.

Delete To delete a transaction, click on the transaction in the list you wish to delete and then click **Delete**.

Note: Transfers may only be deleted from the Lunch-Data-Edit Student Lunch Data screen. This safeguard is used to ensure that transfers are only deleted in pairs.

Print Receipt To print a receipt for any deposit listed on this screen, first click on a deposit transaction in the list to select it and then click **Print Receipt**.

Print Trans To print a list of all transactions listed on this screen, click **Print Trans**.

Print Notice To print a notice for the family lunch account listed on this screen, click **Print Notice**. You will then be prompted to enter/edit the message that will be included in the notice. The resulting notice will contain this message along with the family's current lunch balance. Also, all students having this contact as their lunch contact will be listed along with their student lunch account balances.

Save To save changes to the screen, click **Save**.

Done To exit the screen and return to the main screen of the JMC Office Application, click **Done**. If changes have been made that have not been saved, a dialog box will appear asking whether the changes should be saved.

Lunch—Data—Edit Adult Cash Account

This selection is used to maintain account information for adult cash (guest) lunch transactions. Guests would be anyone not having a JMC lunch account. The adult and student cash account screens are used to keep adult and student cash account transactions separate since they generally involve different prices for meals. Deposits, refunds, and a basic report may be accomplished from this screen.

1. Select Lunch—Data—Edit Adult Cash Account. A screen will appear similar to Figure 10.

Date	User	Deposit/Refund	Purchase	Status	Amount	Balance
02/14/2007	Mary		Toast		\$ -0.25	\$ -0.25
02/14/2007	Mary		Juice		\$ -0.25	\$ -0.50
02/14/2007	Mary	Deposit	Cash		\$ 0.50	\$ 0.00
02/14/2007	Mary		Adult Breakfast		\$ -1.15	\$ -1.15
02/14/2007	Mary		Adult Extra Milk		\$ -0.25	\$ -1.40
02/14/2007	Mary	Deposit	Cash		\$ 1.40	\$ 0.00
02/14/2007	Mary		Adult Breakfast		\$ -1.15	\$ -1.15
02/14/2007	Mary	Deposit	Cash		\$ 1.15	\$ 0.00
02/14/2007	Mary		Cereal		\$ -0.25	\$ -0.25
02/14/2007	Mary		Fruit		\$ -0.25	\$ -0.50
02/14/2007	Mary	Deposit	Cash		\$ 0.50	\$ 0.00
02/14/2007	Mary		Roll/Muffin		\$ -0.50	\$ -0.50
02/14/2007	Mary		Juice		\$ -0.25	\$ -0.75
02/14/2007	Mary	Deposit	Cash		\$ 0.75	\$ 0.00

Figure 10: Edit Adult Cash Account screen.

Delete To delete a transaction from the Adult Cash Accounts, click on the transaction in the list you wish to delete and then click **Delete**.

Print Trans To print a list of all Adult Cash transactions listed on this screen, click **Print Trans**.

Save To save changes to the Adult Cash Accounts screen, click **Save**.

Done To exit the Adult Cash Accounts screen and return to the main screen of the JMC Office Application, click **Done**. If changes have been made to the Adult Cash Accounts that have not been saved, a dialog box will appear asking whether the changes should be saved.

Lunch—Data—Edit Student Cash Account

This selection is used to maintain account information for student cash (guest) lunch transactions. Guests would be anyone not having a JMC lunch account. The student and adult cash account screens are used to keep student and adult cash account transactions separate since they generally involve different prices for meals. Deposits, refunds, and a basic report may be accomplished from this screen.

1. Select Lunch—Data—Edit Student Cash Account. A screen will appear essentially the same as Figure 10: Edit Adult Cash Accounts

Delete To delete a transaction from the Student Cash Accounts, click on the transaction in the list you wish to delete and then click **Delete**.

Print Trans To print a list of all Student Cash Account transactions listed on this screen, click **Print Trans**.

Save To save changes to the Student Cash Accounts screen, click **Save**.

Done To exit the Student Cash Accounts screen and return to the main screen of the JMC Office Application, click **Done**. If changes have been made to the Student Cash Accounts that have not been saved, a dialog box will appear asking whether the changes should be saved.

Lunch—Data—Determine Free or Reduced Status

This selection is used to determine eligibility for free and reduced lunch programs based on federal guidelines. The user will enter the household size and income and the eligibility result will be displayed. The result status may be applied to the dependents of the contact specified for this determination.

JMC Office Application users must be granted “Make Changes” access to Sensitive data in order to use this menu option. To check your user privileges, select File-Who Am I. Contact your JMC Administrator for modifications to your user privileges.

1. Select Lunch—Data—Determine Free or Reduced Status. A screen will appear similar to Figure 11.

Figure 11: Determination of Free or Reduced Status for school lunches.

2. Enter the size of the household in the **Household Size** box.
3. Enter the income amount in the appropriate **Income** box. You may enter the income as an Annual, Monthly, or Weekly income amount. The calculation is done automatically and the determination will display immediately as **Free Meals**, **Reduced Meal Prices**, or **Not Eligible** (pertinent income cutoff information will be listed).
4. Depending upon the eligibility calculation, the results may be applied to the dependents of a specific family. The actions for doing so are documented below.

Select a Family This button will be enabled as soon as an income amount is entered and will allow the result to be applied to a specific family by clicking **Select a Family**. A screen will then appear allowing for the selection of the target family.

Make Dependents Free/Reduced/Paying The result determined on this screen may be applied to any dependents of the selected family by clicking **Make Dependents Free/Reduced/Paying**. A screen titled "Status Change Effective Date" will appear which will allow a date to be specified for the application of this new status for the dependent(s). Then a series of screens will allow the newly determined lunch status to be applied to each dependent separately (**Change** or **Don't Change** are the options displayed for each dependent).

Note: If the newly determined result is applied to a student who has pre-existing charges on their lunch account and the specified **Status Change**

Effective Date encompasses dates for pre-existing charges, the student's lunch account balance will be adjusted by the appropriate amount (based on pricing levels appropriate for their new status and the number of affected breakfast or lunch transactions).

Note: Dependents of families are established by editing contact information by selecting Edit-Edit Student Data (as outlined in the Attendance documentation for the JMC Office Application).

Reset To reset the Household Size and Income values entered on this screen, click **Reset**.

Done To exit this screen and return to the main menu of the JMC Office Application, click **Done**.

Lunch—Data—Eligibility Notification Letter

This selection is used to generate eligibility notifications for lunch status changes to student contacts. It may also be used to change the lunch status for the contact's dependents.

1. Select Lunch—Data—Eligibility Notification Letter. You will first be prompted to select a recipient for this letter from the contact data. After selecting a contact, the screen will appear similar to Figure 12.

Eligibility Notification Letter

Print an Eligibility Notification Letter for:

Select a Parent/Guardian...

Parent/Guardian: Mr. & Mrs. Dan Benson
1899 Riverview Rd
Sometown, MN 55555

Status: Approved for Free

Other:

Effective Date: 11/07/03

Make Dependents 'Free'

Hearing Official: Mr. Robert Johnson
Phone: 651-555-4433
Address: 100 S. Cedar Ave.
City, State Zip: St. Paul, MN 55001

Eligibility Official: Ms. Roberta Anderson
Phone: 651-555-3322

Done Print

Figure 12: Eligibility Notification Letter screen.

2. If necessary, click on **Select a Parent/Guardian...** to reselect the contact to receive the eligibility notification letter.
3. Click on the **Status** menu to select the appropriate lunch status for the parent/guardian. Status menu options are:
 - a. Approved for Free
 - b. Approved for Reduced Price
 - c. Denied because Income Too High
 - d. Denied – Other...
4. If **Denied-Other...** was selected from the **Status** menu, you may enter a brief description of the reason for the denial in the **Other** field.
5. Enter the **Effective Date** for the new lunch status in the **Effective Date** field.
6. You may click **Make Dependents Free/Reduced/Paying** in order to change the lunch status for all dependents of the currently displayed contact. Immediately a series of screens will allow the newly determined lunch status to be applied to each dependent separately (**Change** or **Don't Change** are the options displayed for each dependent).

Note: If the newly determined result is applied to a student who has pre-existing charges on their lunch account and the specified **Effective Date** encompasses dates for pre-existing charges, the student's lunch account balance will be adjusted by the appropriate amount (based on pricing levels appropriate for their new status and the number of affected breakfast or lunch transactions).

Note: Dependents of families are established by editing contact information by selecting Edit-Edit Student Data (as outlined in the Attendance documentation for the JMC Office Application).

7. You may enter information into the following fields: **Hearing Official, Phone, Address, City/State/Zip, Eligibility Official, and Phone**. Whatever is entered into these fields will be displayed on the eligibility notification letter.

Note: Values entered into these fields will remain until edited or removed.

8. Click **Done** to return to the main screen of the JMC Office Application or click **Print** to print an eligibility notification letter for the currently displayed contact. The letter will appear similar to Figure 13.

PARENT/GUARDIAN NOTIFICATION LETTER FOR FREE OR REDUCED PRICE MEALS

1674 High School
1609 North Oak Street
Lake City MN 55041

11/07/2003

Mr. & Mrs. Dan Benson
1899 Riverview Rd
Sometown, MN 55555

Dear Parent/Guardian:

Your application for free or reduced price meals is APPROVED for FREE meals, effective 11/07/03.

The cost for meals is as follows:

	Lunch	Breakfast
Benson, Laura	\$0.00	\$0.00
Benson, Hannah	\$0.00	\$0.00

You may contact us if you do not agree with the decision about your meal application. You may request a fair hearing by calling or writing:

Mr. Robert Johnson 651-555-4433
100 S. Cedar Ave.
St. Paul, MN 55001

Reporting Later Changes - Notify your child(ren)'s school by phone or in writing.

Households qualifying for free school meals based on Food Stamps, TANF, or FDIIR must notify the school if benefits end or change.

Households qualifying for free or reduced-price school meals by income must notify the school if household size decreases, or earnings increase by more than \$50/month or \$600/year.

Sincerely,

Ms. Roberta Anderson 651-555-3322

The U.S. Department of Agriculture (USDA) prohibits discrimination in all its programs and activities on the basis of race, color, national origin, gender, religion, age, or disability. To file a complaint of discrimination, write USDA, Director, Office of Civil Rights, Room 326-W, Whitten Building, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410 or call

Figure 13: Eligibility Notification Letter example.

Lunch—Data—Edit Pricing Groups

This selection is used to establish pricing groups for different grade level groupings. Up to 6 pricing groups may be established. Pricing groups may be used to set different menu selections and/or different pricing structures for each building or other grade level group.

Note: Pricing Groups should only be established before the start of the school year.

Note: By default there will be one pricing group for grades 0 - 12.

Note: Adults should be assigned a grade level that will place them in the proper pricing group. Grade levels may be assigned by using File-Enter Student Data.

1. Select Lunch—Data—Edit Pricing Groups. A screen will appear similar to Figure 14.

Edit Pricing Groups			
Number of Pricing Groups: 3 ▼			
Grade Range			
Group 1	0	to	4
Group 2	5	to	8
Group 3	9	to	12

Cancel OK

Figure 14: Edit Pricing Groups screen.

2. Select the desired number of pricing groups from the menu. The number of pricing groups will be at least 1 and at most 6.
3. Fill in the grade ranges for each pricing group.

Note: No overlap is allowed between grade ranges for the various pricing groups. In other words, each grade level can be in only one pricing group.

Note: All grades for your school district should be represented in the grade ranges.

4. Click **OK** to save the changes and return to the main menu of the JMC Office Application OR click **Cancel** to return to the main menu without saving the changes.

Lunch—Data—Edit Meal Prices

This selection is used to edit meal prices for various breakfast and lunch situations. This includes price variations for regular, free, or reduced lunches as well as meal variations such as breakfast, lunch, extra milk, etc. Rates may be set differently for adults and students. Federal and state reimbursement rates are entered on this screen, as well.

1. Select Lunch—Data—Edit Meal Prices. A screen will appear similar to Figure 15.

Meal Prices

Grades 5 to 8 ▼

Breakfast		Costs	
Meal Name	Individual	State	Federal
Student Breakfast	1.00	0.0300	0.2100
Reduced Breakfast	0.35	0.0300	0.7900
Free Breakfast	0.00	0.0300	1.0900
Student Extra Milk	0.15	0.0000	0.0000
Adult Breakfast	1.15	0.0000	0.0000
Adult Extra Milk	0.25	0.0000	0.0000

Lunch		Costs	
Meal Name	Individual	State	Federal
Student Lunch	1.05	0.0700	0.1200
Reduced Lunch	0.45	0.0700	1.5800
Free Lunch	0.00	0.0700	1.9800
Student Extra Milk	0.15	0.0000	0.0000
Adult Lunch	2.50	0.0000	0.0000
Adult Extra Milk	0.25	0.0000	0.0000

Print Save Done

Figure 15: Edit Meal Prices screen.

Select a Pricing Group Select the pricing group you wish to edit from the menu in the upper left corner. The pricing groups will be specified by their respective grade ranges.

Editing Costs To edit a cost on the Edit Meal Prices screen, click on the number to select it and then type in a new value. Individual costs reflect the actual price paid by a student or adult. State and Federal costs represent the amount to be reimbursed by the state/federal government for each meal or milk.

Print To print the table of prices displayed on the Edit Meal Prices screen, click **Print**.

Save To save changes to the Edit Meal Prices screen, click **Save**.

Done To exit the Edit Meal Prices screen and return to the main screen of the JMC Office Application, click **Done**. If changes have been made to the Meal Prices that have not been saved, a dialog box will appear asking whether the changes should be saved.

Lunch—Data—Edit A La Carte Prices

This selection is used to edit prices for various breakfast and lunch a la carte items. A La Carte items may be defined simply by adding them to the list.

1. Select Lunch—Data—Edit A La Carte Prices. A screen will appear similar to Figure 16.

The screenshot shows a window titled "A La Carte Prices" with a dropdown menu set to "Grades 5 to 8". It contains two tables: "Breakfast" and "Lunch". Each table has columns for "Item Name" and "Cost". The "Breakfast" table lists items like Toast, Juice, Cereal, Fruit, and Roll/Muffin with costs ranging from 0.00 to 0.50. The "Lunch" table lists items like Student Second Lunch, Program Lunch, Entree, Half Sandwich, Whole Sandwich, Small Soup, Large Soup, Rice/Potatoes, Cup Fruit/Veg, Roll/Muffin, Cookie/Dessert, Breadstick, and Large Salad with costs ranging from 0.00 to 2.00. At the bottom are buttons for "Print", "Save", and "Done".

Breakfast		Lunch	
Item Name	Cost	Item Name	Cost
Toast	0.25	Student Second Lunch	2.00
Juice	0.25	Program Lunch	1.25
Cereal	0.25	Entree	1.35
Fruit	0.25	Half Sandwich	0.50
Roll/Muffin	0.50	Whole Sandwich	1.00
	0.00	Small Soup	0.55
	0.00	Large Soup	1.10
	0.00	Rice/Potatoes	0.50
	0.00	Cup Fruit/Veg	0.50
	0.00	Roll/Muffin	0.50
	0.00	Cookie/Dessert	0.25
	0.00	Breadstick	0.25
	0.00	Large Salad	1.80
	0.00		0.00
	0.00		0.00
	0.00		0.00

Figure 16: Edit A La Carte Prices screen.

Select a Pricing Group Select the pricing group you wish to edit from the menu in the upper left corner. The pricing groups will be specified by their respective grade ranges.

Editing Item Names To edit the name of an item on the Edit A La Carte Prices screen, click to the left of the price to select the item name (or to get a typing cursor if the item was blank) and then type in the new name for the item.

Note: Up to 40 A La Carte items may be defined for each meal.

Note: The first two item names in the lunch list, Student Second Lunch and Program Lunch, are not editable.

Editing Costs To edit a cost on the Edit A La Carte Prices screen, click on the number to select it and then type in a new value.

Warning: A La Carte items should not be moved within these lists once purchases have been made using these price tables.

Note: Price changes do not affect past transactions.

Print To print the table of prices displayed on the Edit A La Carte Prices screen, click **Print**.

Save To save changes to the Edit A La Carte Prices screen, click **Save**.

Done To exit the Edit A La Carte Prices screen and return to the main screen of the JMC Office Application, click **Done**. If changes have been made to the A La Carte Prices that have not been saved, a dialog box will appear asking whether the changes should be saved.

Lunch—Data—Edit Low Balance Limit

This selection is used to edit the Low Balance Limit for account transactions. Transactions at the Point of Sale that cause a student's balance to fall below this threshold will result in a warning issued on the Point of Sale screen.

1. Select Lunch—Data—Edit Low Balance Limit. A screen will appear similar to Figure 17.

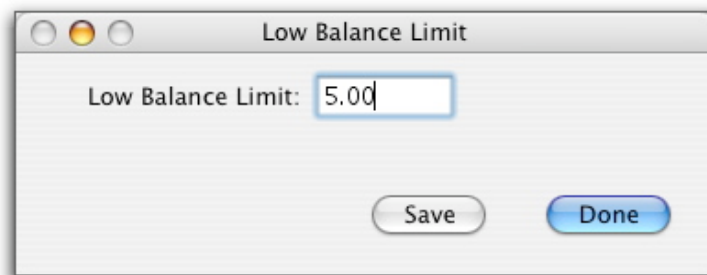


Figure 17: Edit Low Balance Limit screen.

Low Balance Limit To enter a new amount for the Low Balance Limit, type a new number in the **Low Balance Limit** box.

Save To save changes to the Edit Low Balance Limit screen, click **Save**.

Done To exit the Edit Low Balance Limit screen and return to the main screen of the JMC Office Application, click **Done**. If changes have been made to the Low Balance Limit that have not been saved, a dialog box will appear asking whether the changes should be saved.

Lunch—Data—Import Account Balances from Prior Year

This selection is used to import lunch account balance from a prior year into the current year's data.

1. Select Lunch—Data—Import Account Balances from Prior Year.
 2. Enter the date to be assigned to the resulting account credit(s). Click **Okay** to continue or **Cancel** to return to the main screen of the JMC Office Application.
 3. If **Okay** was clicked, a new screen will redisplay the date entered. Click **Proceed** to accept the date and continue the importation process or click **Cancel** to return to the prior screen.
 4. If **Proceed** was clicked, a screen will appear prompting the user to locate the JMC data for the prior year.
-

Lunch—Data—Import Free and Reduced Status from Prior Year

This selection is used to import students' free and reduced status from a prior year into the current year's data.

1. Select Lunch—Data—Import Free and Reduced Status from Prior Year.
 2. If lunch transactions have already been processed for the current school year, a warning will appear requiring you to **Cancel** or **Proceed**.
 3. Enter the date imported status changes become effective. Click **Okay** to continue or **Cancel** to return to the main screen of the JMC Office Application.
 4. If **Okay** was clicked, a new screen will redisplay the date entered. Click **Proceed** to accept the date and continue the importation process or click **Cancel** to return to the prior screen.
 5. If **Proceed** was clicked, a screen will appear prompting the user to locate the JMC data for the prior year.
-

Lunch—Data—Initialize Family Lunch Contacts

This selection is used to initialize family lunch contacts for all students in the current year's data. The process will generate a family lunch contact for students who have designated at least one primary contact but no lunch contact. If a student has more than one primary contact designated, this process will use the first primary contact listed to create the lunch contact. If a student does not have a primary contact designated, then this process will not generate a lunch contact for that student.

1. Select Lunch—Data—Initialize Family Lunch Contacts.
2. A screen will appear asking whether you wish to proceed or cancel this process. Click **Proceed** to continue.
3. Once the process has completed, a screen will appear indicating the number of lunch contacts generated. These can be verified by searching the students' Contacts popup menu on the Edit-Edit Student Data screen and locating the lunch contact.

Note: A student may only have one lunch contact designated.

Note: Students' lunch contacts may also be edited individually on the Edit-Edit Student Data screen.

Lunch—Reports—Meals Served

This selection is used to generate a report for the number and value of meals served during the designated day or time span.

The report will consist of 2 parts for each meal designation checked as included; the first part will list all pertinent transactions summarized by the number of units served, and the second part will list all pertinent transactions summarized by the overall value (cost) of the units served. If more than one date is specified in the date range, a summary for each date will be listed on subsequent rows in the report and an overall summary will be at the end of the list.

1. Select Lunch—Reports—Meals Served. A screen will appear similar to Figure 18.

A screenshot of a software window titled "Meals Served". It contains several input fields and checkboxes. At the top, "Building Number:" is followed by a dropdown menu showing "All". Below that, "Pricing Group:" is followed by a dropdown menu showing "Grades 5 to 8". Then, "From Date:" is followed by a text box containing "02/14/07", and "To Date:" is followed by a text box containing "02/14/07". Under the heading "Include:", there are three checked checkboxes: "Breakfast", "Lunch", and "Extra Milk". At the bottom right, there are two buttons: "Cancel" and "OK".

Figure 18: Meals Served Report selection criteria screen.

2. Specify the building number in the **Building Number menu**.

Note: If there is only one building number present in the database, the **Building Number menu** will not appear on the screen.

3. Specify the pricing group in the **Pricing Group menu**.

Note: If there is only one pricing group present in the database, the **Pricing Group menu** will not appear on the screen.

4. Specify the transaction date or range of dates for the Meals Served report.
5. Click on the appropriate checkboxes to include breakfast, lunch, and/or extra milk in the report results.
6. Click **OK** to print the report or click **Cancel** to exit this screen and return to the main menu of the JMC Office Application.

Lunch—Reports—A La Carte Items Served

This selection is used to generate a report for the A La Carte items served during the designated day or time span.

The report will consist of 2 parts; the first part will list all a la carte item transactions summarized by the number of units served, and the second part will list all a la carte item transactions summarized by the overall value (cost) of the units served. If more than one date is specified in the date range, a summary for each date will be listed in subsequent columns in the report and an overall summary will be in the last column.

1. Select Lunch—Reports—A La Carte Items Served. A screen will appear similar to Figure 19.

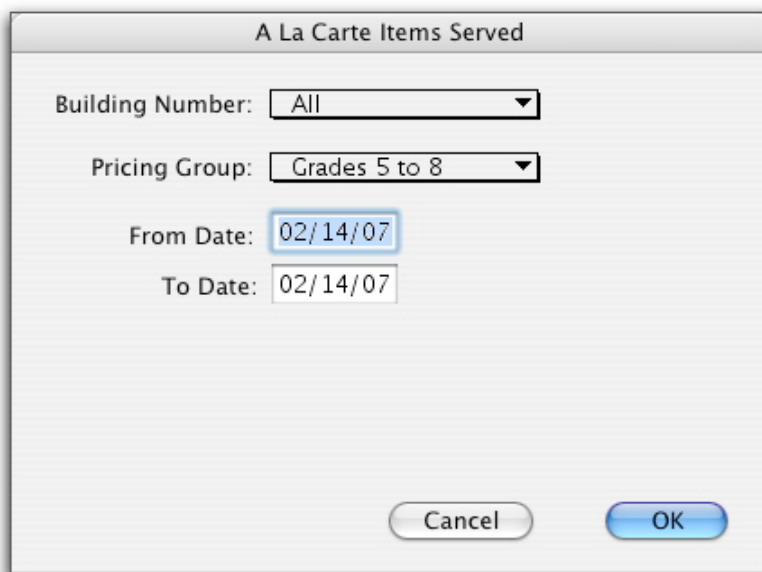
A screenshot of a software dialog box titled "A La Carte Items Served". The dialog box has a light gray background and a thin border. It contains four input fields: "Building Number:" with a dropdown menu showing "All"; "Pricing Group:" with a dropdown menu showing "Grades 5 to 8"; "From Date:" with a text box containing "02/14/07"; and "To Date:" with a text box containing "02/14/07". At the bottom right, there are two buttons: "Cancel" and "OK". The "From Date" and "To Date" text boxes are highlighted with a blue border.

Figure 19: A La Carte Items Served Report selection criteria screen.

2. Specify the building number in the **Building Number menu**.

Note: If there is only one building number present in the database, the **Building Number menu** will not appear on the screen.

3. Specify the pricing group in the **Pricing Group menu**.

Note: If there is only one pricing group present in the database, the **Pricing Group menu** will not appear on the screen.

4. Specify the transaction date or range of dates for the A La Carte Items Served report.
5. Click **OK** to print the report or click **Cancel** to exit this screen and return to the main menu of the JMC Office Application.

Lunch—Reports—Lunch Status

This selection is used to generate a report for the lunch status of all students in the database during a date span specified by the user.

The report will consist of up to four parts, one for each lunch status. The four lunch status types are Student Paying, Student Reduced, Student Free, and Adult Paying. Each of the four parts will print only if there are students with that status. For example, the Adult Paying part of the report will not print unless there are students/adults in the JMC data with that status.

Each of the reports will list all students with that particular status in alphabetical order and will list their JMC student number and grade, as well. Also, students who experienced a change in lunch status during the specified date span will be so designated on the report.

Also, if any discrepancies exist between student lunch status and status change records, an additional report will be printed listing the discrepancies. If any such discrepancies exist, you may wish to contact JMC for advise on how they should be handled.

A student's lunch status can be modified on the following screens: Lunch-Data-Edit Student Lunch Data, Lunch-Data-Determine Free Or Reduced Status, and Edit-Edit Student Sensitive Data. In all three cases, the JMC Office Application user must be granted "Make Changes" access to Sensitive data for them to modify a student's lunch status. Users may check their current access levels by selecting File-Who Am I.

1. Select Lunch—Reports—Lunch Status. A screen will appear similar to Figure 20.

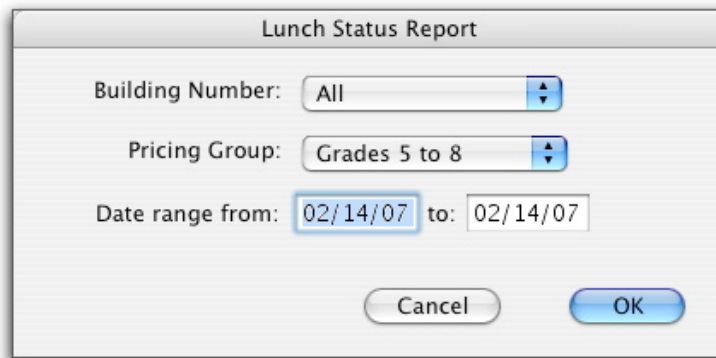


Figure 20: Lunch Status Report selection criteria screen.

2. Specify the building number in the **Building Number menu**.

Note: If there is only one building number present in the database, the **Building Number menu** will not appear on the screen.

3. Specify the pricing group in the **Pricing Group menu**.

Note: If there is only one pricing group present in the database, the **Pricing Group menu** will not appear on the screen.

- Click **OK** to generate the report or click **Cancel** to return to the main screen of the JMC Office Application.
-

Lunch—Reports—Balance Sheet

This selection is used to generate a balance sheet containing a list of all students whose account balances are below the specified balance or will run out of money within a specified number of days.

When running this report using the **Select by Days** option, the students' lunch transactions will be used to determine whether their accounts will run low in the specified number of days. If a student has at least 10 transactions on their lunch account, then that student's average daily lunch expense will be used to determine whether they will be listed on this report. If a student has fewer than 10 but more than 0 lunch transactions on their account, then a rate of one lunch per day, priced according to the student's current lunch status, will be used to determine whether they will be listed on this report.

When running this report using the **Select by Balances** option, a minimum balance and a minimum reduced balance will be used to determine whether student will be listed on the report.

The report will contain a list of family and student accounts that will have a low balance according to the specified criteria. Students who have a lunch contact designated will appear underneath their lunch contact's name.

- Select Lunch—Reports—Balance Sheet. A screen will appear similar to Figure 21.

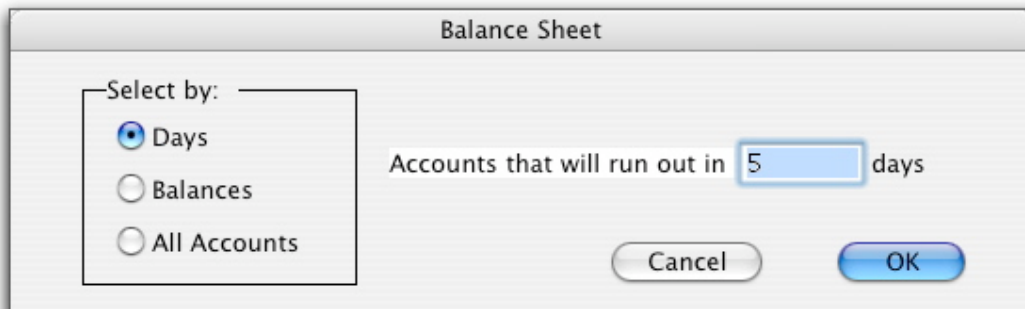


Figure 21: Balance Sheet selection criteria screen for Select by Days.

- Specify either **Days** or **Balances** or **All Accounts** from the **Select By** options.
 - If Select by **Days** is specified, enter the number of days that are to be used in the report. See Figure 21.
 - If Select by **Balances** is specified, enter the minimum balance and minimum reduced balance for the Balance Sheet report.
 - Click **OK** to print the report or click **Cancel** to exit this screen and return to the main menu of the JMC Office Application.
-

Lunch—Reports—Low Balance Notices

This selection is used to generate notices of low lunch account balances. The user can either specify the number of days in which the accounts will run low or specify the minimum amount to be used as a cutoff value for selecting the recipients of these notices. The user can also create a message that will be printed on each notice.

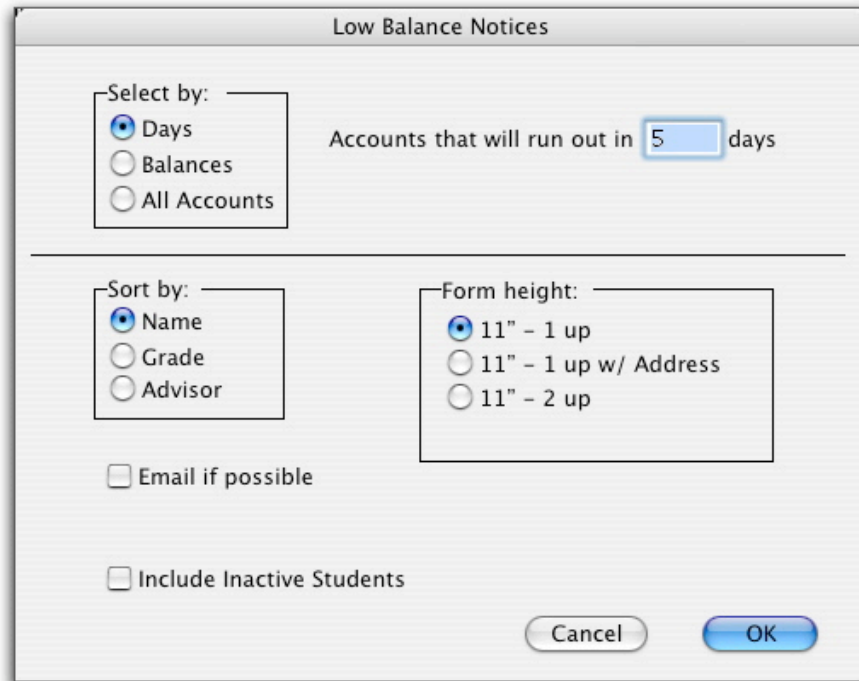
When generating notices using the **Select by Days** option, the students' lunch transactions will be used to determine whether their accounts will run low in the specified number of days. If a student has at least 10 transactions on their lunch account, then that student's average daily lunch expense will be used to determine whether a notice is generated. If a student has fewer than 10 but more than 0 lunch transactions on their account, then a rate of one lunch per day, priced according to the student's current lunch status, will be used to determine whether a notice is generated.

When running this report using the **Select by Balances** option, a minimum balance and a minimum reduced balance will be used to determine whether a notice is generated.

When running this report using the **Select by All Accounts** option, a notice will be generated for all family and student accounts.

Low balance notices will be generated according to the specified criteria. Students who have a lunch contact designated will appear on the low balance notice for their lunch contact.

1. Select Lunch—Reports—Low Balance Notices. A screen will appear similar to Figure 22.



The image shows a software window titled "Low Balance Notices". It contains several configuration options:

- Select by:** A group box containing three radio buttons: "Days" (selected), "Balances", and "All Accounts".
- Accounts that will run out in:** A text field containing the number "5" followed by the word "days".
- Sort by:** A group box containing three radio buttons: "Name" (selected), "Grade", and "Advisor".
- Form height:** A group box containing three radio buttons: "11" - 1 up" (selected), "11" - 1 up w/ Address", and "11" - 2 up".
- Email if possible:** A checkbox that is currently unchecked.
- Include Inactive Students:** A checkbox that is currently unchecked.
- Buttons:** "Cancel" and "OK" buttons at the bottom right.

Figure 22: Low Balance Notice setup screen.

2. Specify either **Days**, **Balances**, or **All Accounts** from the **Select By** options.
3. If Select by **Days** is specified, enter the number of days that are to be used in the report.
4. If Select by **Balances** is specified, enter the minimum balance and minimum reduced balance for the Balance Sheet report.
5. Specify the sort option for the Low Balance Notices. See Figure 22 for the available sort options.
6. Specify the form height for the printed notice. See Figure 22 for the available form height options.
7. To attempt to email this notice to lunch contacts with email addresses associated with their contact information, click on the option **Email if possible**.
8. Inclusion of inactive students is governed by the setting for the **Include Inactive Students** checkbox. Make sure this option is set appropriately.
9. Click **OK** to print the report or click **Cancel** to exit this screen and return to the main menu of the JMC Office Application.

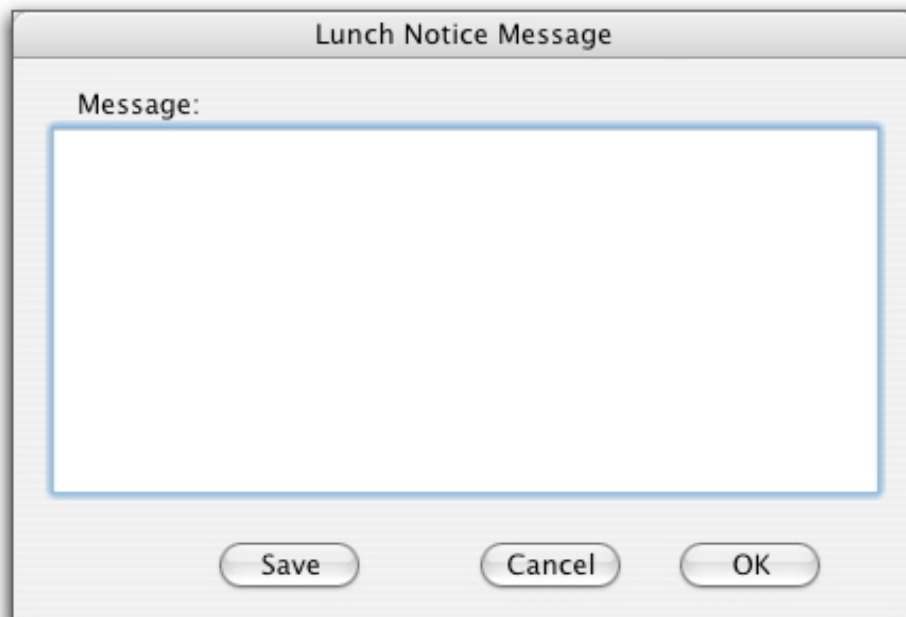


Figure 23: Lunch Notice Message screen.

7. Enter a message to be displayed on the printed notices. See Figure 23.
8. If you wish to save this message for future use, click **Save**.
9. Click **OK** to generate the printed reports.

Lunch—Reports—Summary

This selection is used to generate a summary report of all transactions for the specified date or range of dates.

The first part of the report is a summary of each individual lunch account with a complete breakdown of items, costs, and balances for the specified period. Students who have a lunch contact designated will appear underneath their lunch contact's name.

The second part of the report summarizes the number of breakfasts and lunches served for students, adults, and other categories. The student summaries are organized by building number if more than one building is contained in the data, then by grade and pricing group.

An option is available to print only accounts with payments during the designated transaction date span. If this option is selected, the report summary will not include the complete breakdown described above; instead, the summary will contain a breakdown of deposits recorded by POS and office users.

1. Select **Lunch—Reports—Summary**. A screen will appear similar to Figure 24.

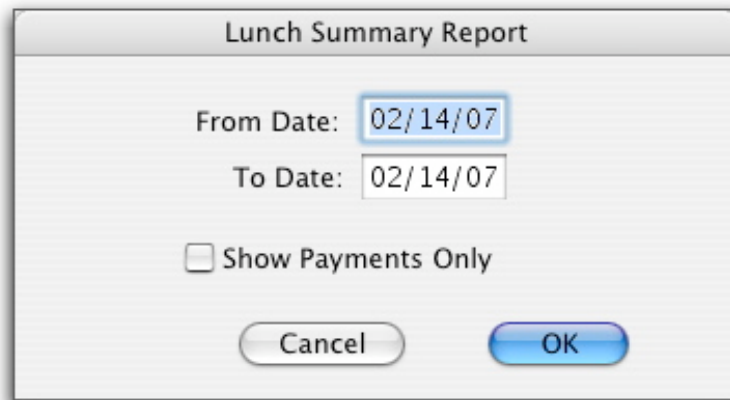


Figure 24: Summary Report selection criteria screen.

2. Specify the transaction date or range of dates for the Summary report.
3. To have the first part of the report show only students with payments during the designated transaction date span, click on the **Show Payments Only** checkbox.
4. Click **OK** to print the report or click **Cancel** to exit this screen and return to the main menu of the JMC Office Application.

Lunch—Reports—Reimbursables

This selection is used to generate a summary report of all transactions for the specified transaction date or range of dates.

This report contains a collective summary broken down by meal categories: breakfasts, lunches, breakfast a la carte, lunch a la carte, breakfast extra milk, and lunch extra milk. These categorical summaries are further broken down according to regular, free, reduced, and adult statuses as well as tallies and totals for individual, state, and federal costs. Also, tallies for meals served during the specified date span are listed with breakdowns by meal, grade level, adults, and other categories.

1. Select Lunch—Reports—Reimbursables. A screen will appear similar to Figure 25.

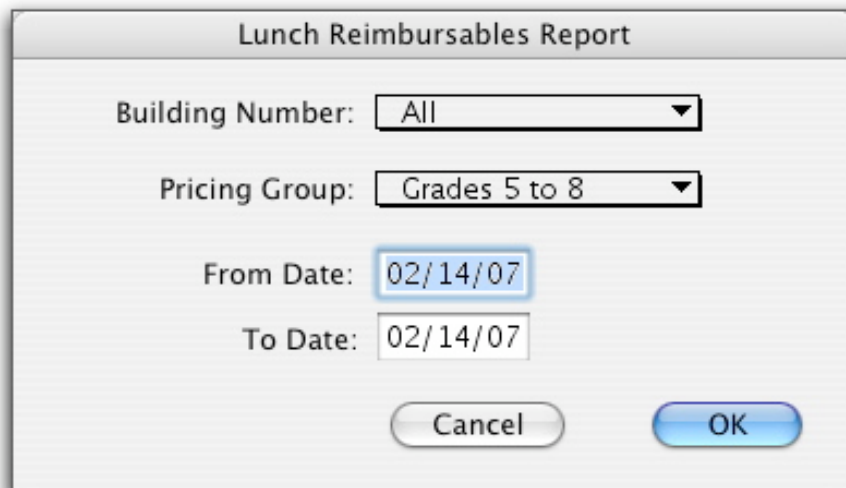
The screenshot shows a dialog box titled "Lunch Reimbursables Report". It contains four input fields: "Building Number" with a dropdown menu showing "All", "Pricing Group" with a dropdown menu showing "Grades 5 to 8", "From Date" with a text box containing "02/14/07", and "To Date" with a text box containing "02/14/07". At the bottom right, there are two buttons: "Cancel" and "OK".

Figure 25: Reimbursables Report selection criteria screen.

2. Specify the building number in the **Building Number menu**.

Note: If there is only one building number present in the database, the **Building Number menu** will not appear on the screen.

3. Specify the pricing group in the **Pricing Group menu**.

Note: If there is only one pricing group present in the database, the **Pricing Group menu** will not appear on the screen.

4. Specify the date or range of dates for the Reimbursables report.
5. Click **OK** to generate the report or click Cancel to return to the main screen of the JMC Office Application.

Lunch—Reports—Claims Edit Check

This selection may be used to analyze the reasonableness of free and reduced breakfast and/or lunch claims for reimbursement by utilizing attendance, lunch status, meals served, and membership count information. These reports may be generated monthly and kept on file to assist schools in demonstrating compliance in breakfast and/or lunch claims reporting.

1. Select Lunch—Reports—Claims Edit Check. A screen will appear similar to Figure 26.

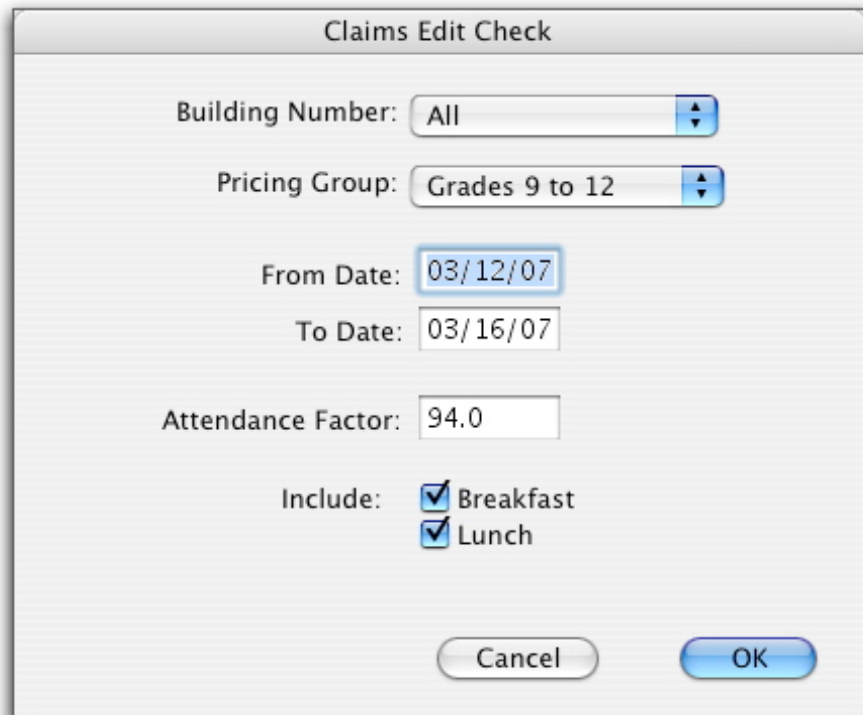
A screenshot of a software dialog box titled "Claims Edit Check". The dialog box has a light gray background and a standard window border. It contains several input fields and checkboxes. At the top, there are two dropdown menus: "Building Number:" with "All" selected, and "Pricing Group:" with "Grades 9 to 12" selected. Below these are two date input fields: "From Date:" with "03/12/07" and "To Date:" with "03/16/07". Further down is a text input field for "Attendance Factor:" with the value "94.0". At the bottom, there are two checked checkboxes labeled "Breakfast" and "Lunch" under the heading "Include:". At the very bottom of the dialog box are two buttons: "Cancel" and "OK".

Figure 26: Claims Edit Check Report selection criteria screen.

2. Specify the building number in the **Building Number menu**.

Note: If there is only one building number present in the database, the **Building Number menu** will not appear on the screen.

3. Specify the pricing group in the **Pricing Group menu**.

Note: If there is only one pricing group present in the database, the **Pricing Group menu** will not appear on the screen.

4. Specify the date or range of dates for the Claims Edit Check report.

5. Modify the **Attendance Factor** as needed.

Note: The **Attendance Factor** is a percentage, typically around 94-97%, that

represents the maximum allowable claims per group per month based on federal lunch reporting guidelines. The **Attendance Factor** may change from year to year but would likely stay the same for the entire school year. Please check with appropriate state department officials each fall for assistance in determining the appropriate **Attendance Factor** for a given school year.

6. Select a report for breakfast and/or lunch by checking the appropriate checkboxes. If both options are checked, a separate report will be generated for each option.
7. Click **OK** to generate the report. The report will appear similar to Figure 27.

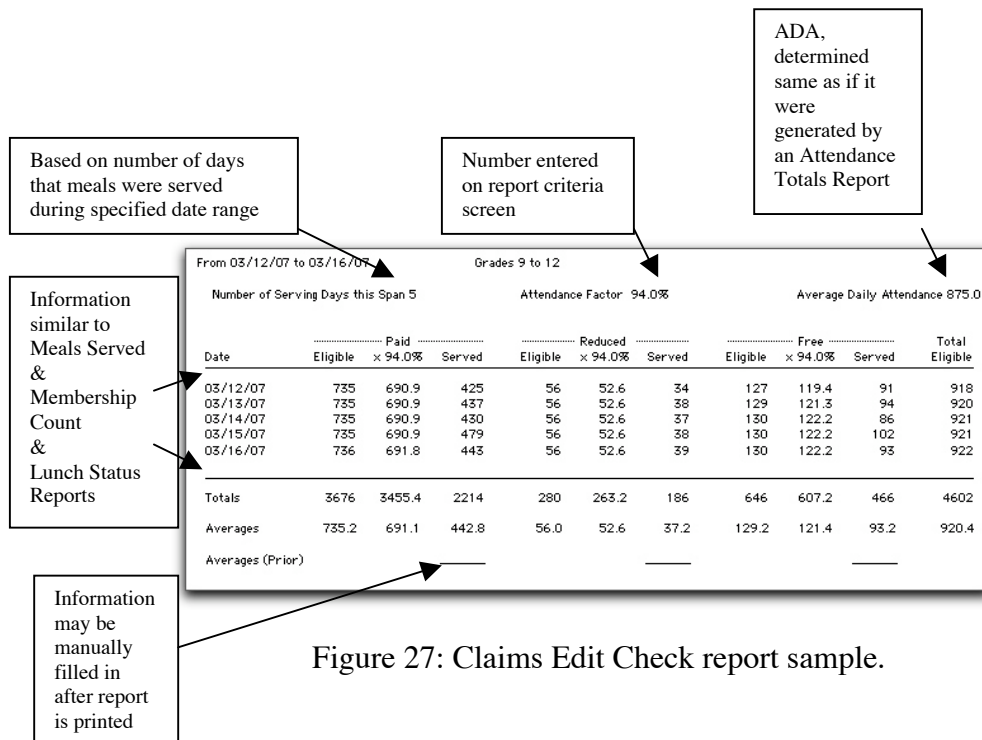


Figure 27: Claims Edit Check report sample.

Lunch—Reports—Print Barcodes

This selection is used to print barcodes for use at the point of sale.

Barcodes are printed in a label format and can be attached to a card for students to carry. At the point of sale students present the employee with their card containing the barcode. The employee uses a barcode scanner (purchased by a third party company) to scan the student's barcode. This will identify that student in the Point of Sale (POS) program.

Note: Before you will be able to print barcodes using this report option, the CarolinaBar-B39-25HO font must be installed on your computer. This font may be downloaded from JMC's website by selecting the [Download JMC Documentation](#) link and scrolling to the bottom of the page download. Then select the barcode font that is appropriate for your operating system. After this has been downloaded, install the font into your font folder if necessary.

1. Select Lunch—Reports—Print Barcodes. The screen will appear similar to Figure 28a (Macintosh) or 28b (Windows).

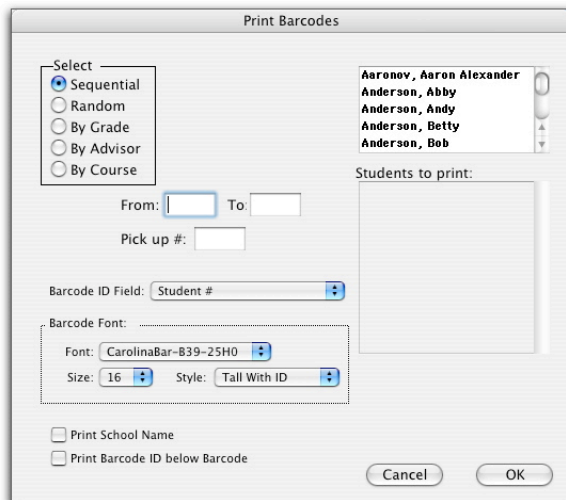


Figure 28a:
Print Barcodes screen
for Macintosh

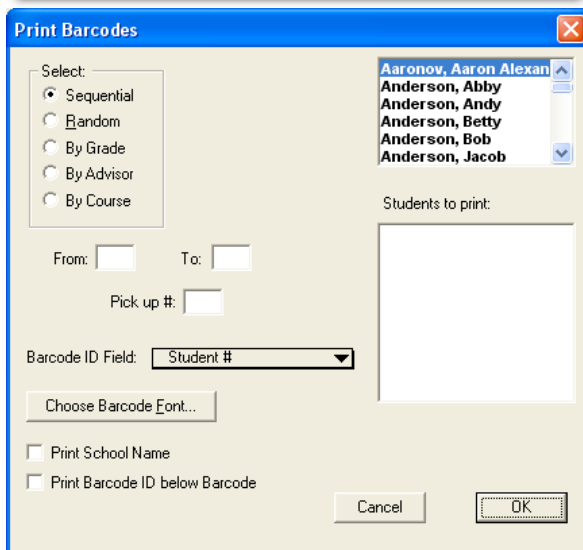


Figure 28b:
Print Barcodes screen
for Windows

2. Select the students whose barcodes you want printed.
3. Specify the barcode ID Field in the **Barcode ID menu**. Typically this is the Student #.
4. Specify the barcode font, size and style.

Macintosh:

- specify the CarolinaBar-B39-25HO font in the **Barcode Font** menu.
- select the font size and style in the **Size and Style** menus.

Note: The font size should be 16 or greater.

Windows:

- Click **Choose Barcode Font**. The screen will appear similar to Figure 29.

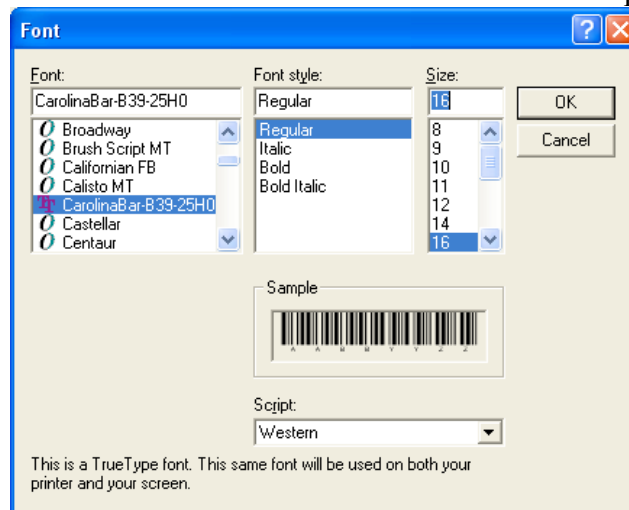


Figure 29:
Selecting the
Barcode Font
for Windows

- Specify the CarolinaBar-B39-25HO font in the **Font** menu.
- Select the font size and style in the **Size and Style** menus.

Note: The font size should be 16 or greater.

- Click **OK** to return to the Print Barcodes screen.

5. Check the appropriate boxes if you want the school name or Barcode ID printed with the barcode for each student.
6. Click **OK** to generate the barcodes or click **Cancel** to return to the main screen of the JMC Office Application.

Starting the JMC Point of Sale Application

1. Start up the JMC Point of Sale (POS) Application by double clicking on it icon or by using some other appropriate step (Start Menu, Apple Menu, etc.).
2. Log in with the user name and password assigned in the JMC Office Application software.

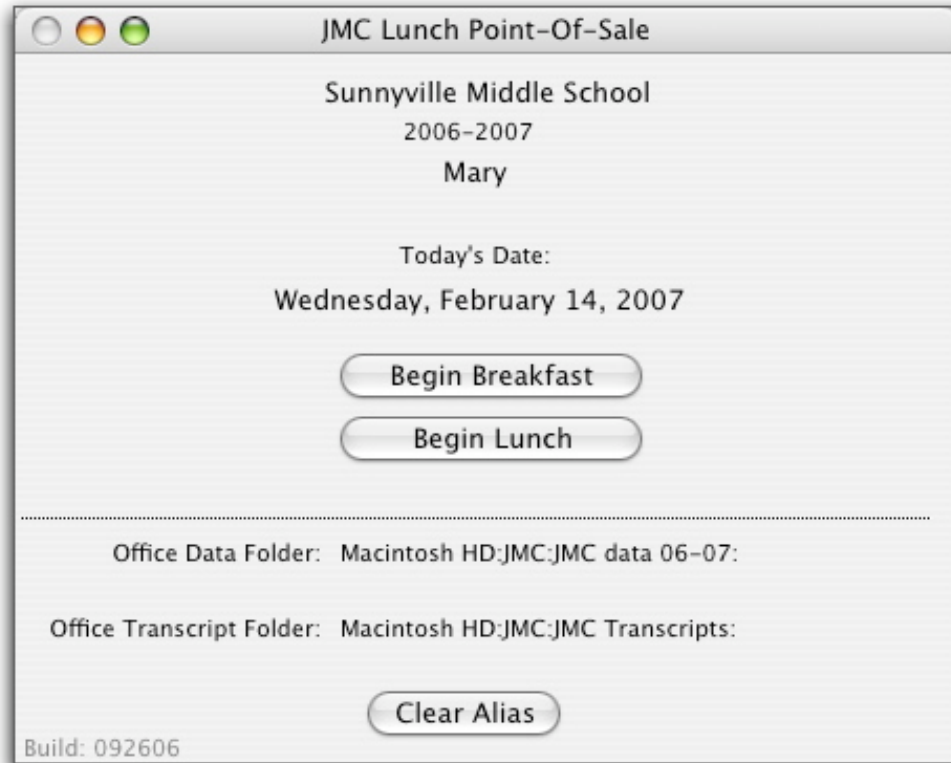


Figure 30: JMC POS Application main screen.

3. Verify that the computer date and time are correct

Warning: It is very important to verify the date on the main screen of the JMC POS Application before processing any transactions. This should be done every time the POS Application is started up. If the date is wrong you may need to quit the POS Application and change the date in the Date and Time control panels/settings for the POS computer.

4. Verify the Preferences for the POS before you begin processing lunch transactions. See Figure 31.

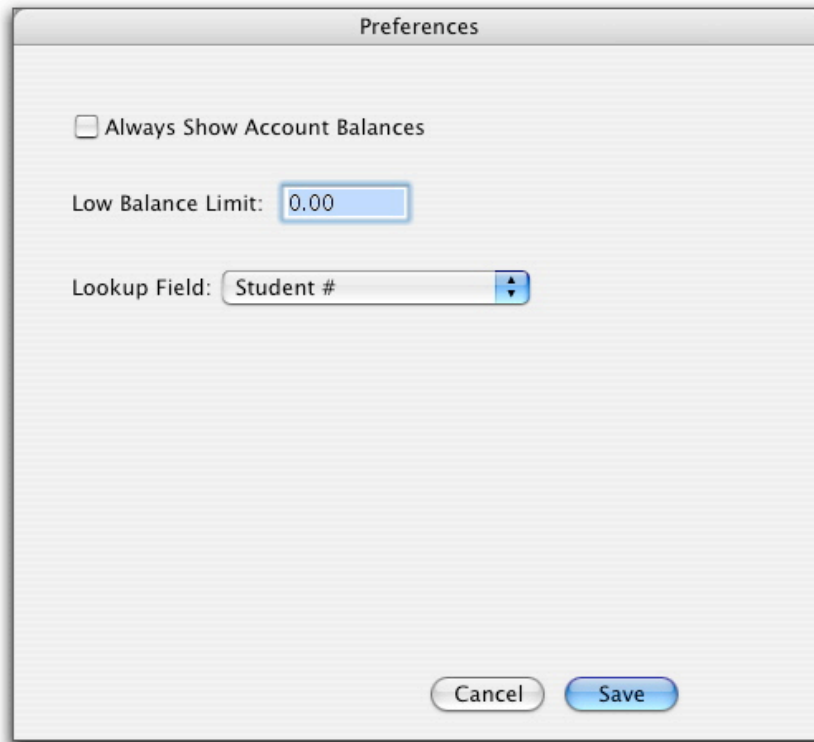


Figure 31: Preferences screen for POS

Always Show Account Balances This option governs whether account balances are shown on the POS breakfast and lunch transaction processing screens.

Low Balance Limit This option governs the account balance limit for the audible and visual warning when a student's transactions will bring them below the specified amount during a POS breakfast or lunch transaction.

Lookup Field This option governs the student ID field that is used by this POS application for the students' lunch ID. Options vary, depending upon the state that this school is located. This option takes place of special or custom versions of the POS application that were set up to use various IDs as the lunch ID.

5. Click on the **Begin Breakfast** or **Begin Lunch** button to begin processing transactions.
-

Documentation for JMC POS Application

Macintosh OS Version

POS—File—Reprocess Transactions

This selection is used to reprocess the transaction file for the specified date. This option would be used in the event of a network failure during the serving time for a meal. Normally the lunch transactions are submitted when the user exits the JMC POS Application screen for processing transactions.

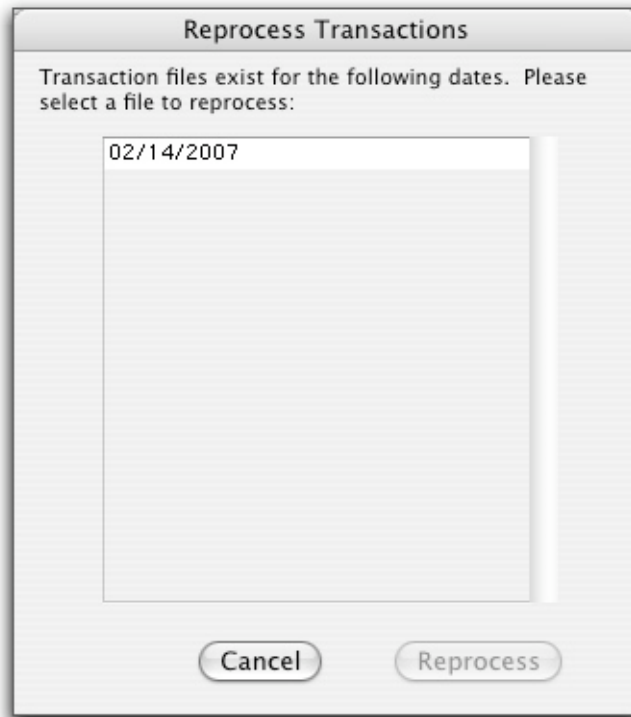


Figure 32: Reprocess Transactions screen for JMC POS Application.

1. Select File-Reprocess Transactions.
2. Click on the transaction file to be reprocessed to select it.
3. Click **Reprocess** to continue OR click **Cancel** to return to the main screen of the JMC POS Application without reprocessing a transaction file.

POS—Begin Breakfast Button

This button is used to begin processing transactions for breakfast.

1. Click **Begin Breakfast**.

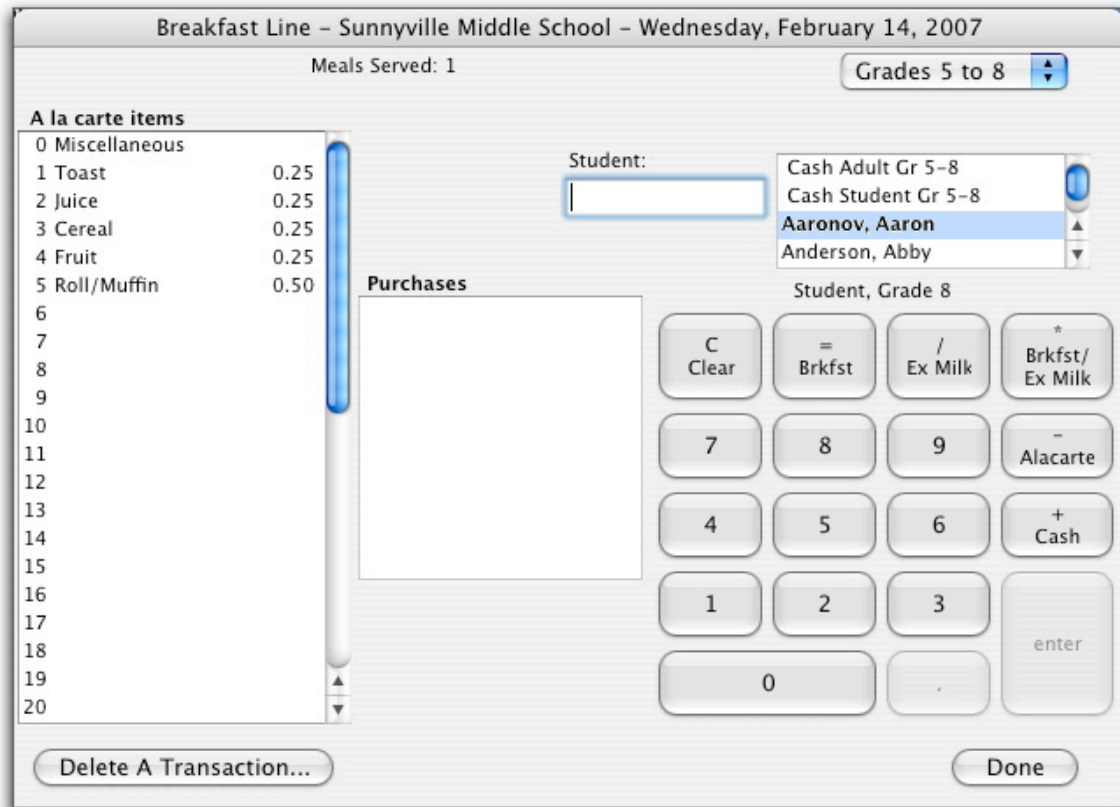


Figure 33: Point of Sale screen for processing breakfast transactions.

2. If necessary, select a pricing group from the menu in the upper right corner of the screen.
3. Process a transaction.
 - a. Identify the customer.
 - i. Student with account - xxx
 - Enter their JMC student number on the keyboard (could also use mouse or up/down arrow keys to select a student from the list in the upper right corner of the screen)
 - The student's name will be highlighted in the list
 - ii. Adult with account - xxx
 - Enter their JMC student number on the keyboard
 - The student's name will be highlighted in the list
 - iii. Guest (cash) student - **00**
 - iv. Guest (cash) adult - **0**

- b. Identify the type of purchase.
 - i. If a lunch/breakfast, press =
 - ii. If an extra milk, press /
 - iii. If a lunch/breakfast with an extra milk, press *
 - iv. If an a la carte item, press -, and then:
 - Enter the number of the a la carte item from the list on the left.
 - Repeat step iv. for additional a la carte items.
- c. Identify the payment type.
 - i. Deduct from account.
 - Press Enter.
 - ii. Pay cash for purchase.
 - Press +
 - The amount that the student owes is displayed.
 - Collect that amount from the student.
 - Press Enter.
 - iii. Deduct from account and make simultaneous deposit to account.
 - Press +
 - The amount that the student owes is displayed.
 - Enter the amount that the student is paying.
 - Press Enter.

The following are examples of breakfast transactions and the keystrokes needed to process the transactions.

Example 1: Student 321 purchases a lunch/breakfast.

Press the following keys: 3 2 1 = Enter

Example 2: Student 321 purchases a lunch/breakfast with an extra milk.

Press the following keys: 3 2 1 * Enter

Example 3: Student 321 purchases a lunch/breakfast with an extra milk and a la carte item #3.

Press the following keys: 3 2 1 * - 3 Enter

Example 4: Student 321 purchases a lunch/breakfast and also deposits \$20 to their account.

Press the following keys: 3 2 1 = + 2 0 Enter

4. To clear the Purchases window of all pending purchases, press the **Clear** key.
5. To Delete a Transaction, click **Delete a Transaction....** The screen will appear similar to Figure 34. Then select the transaction you wish to delete and click **Delete**.

Repeat this as many times as needed, then click **Done** to return to the main screen of the JMC POS Application.

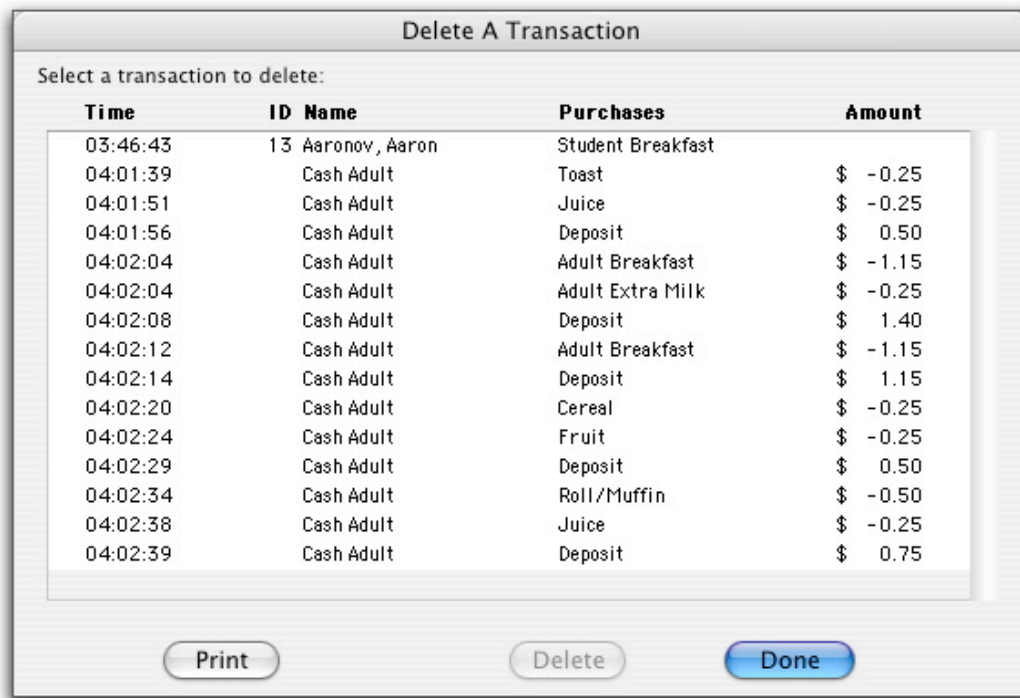


Figure 34: Delete a Transaction screen.

- Continue to process transactions until the serving period has concluded.
- When the serving period has concluded, click **Done** to return to the main screen of the JMC POS Application. At this point all transactions for the meal just served will be transmitted to the JMC Data folder on the network server. Prior to this all transactions have been saved on a file on the local hard drive of the POS computer.

Note: In the event of a loss of network service, the transaction file can be reprocessed at a later time when network services have been restored. See [POS-File-Reprocess Transactions](#) for details on this procedure.

POS—Begin Lunch Button

This button is used to begin processing transactions for lunch.

- Click **Begin Lunch**. The screens and procedures are essentially the same as for breakfast. See Figure 36.
-

POS—Clear Alias Button

This button is used in selecting a data folder for the JMC POS Application. This procedure is done only once when the POS Application is first being set up or if the wrong folder is selected.

1. Click **Clear Alias**.
 2. Quit the JMC POS Application.
 3. Restart the JMC POS Application.
 4. Navigate to the JMC Data folder for the appropriate school year.
-

Documentation for JMC POS Application

Windows Version

POS—File—Reprocess Transactions

This selection is used to reprocess the transaction file for the specified date. This option would be used in the event of a network failure during the serving time for a meal. Normally the lunch transactions are submitted when the user exits the JMC POS Application screen for processing transactions.

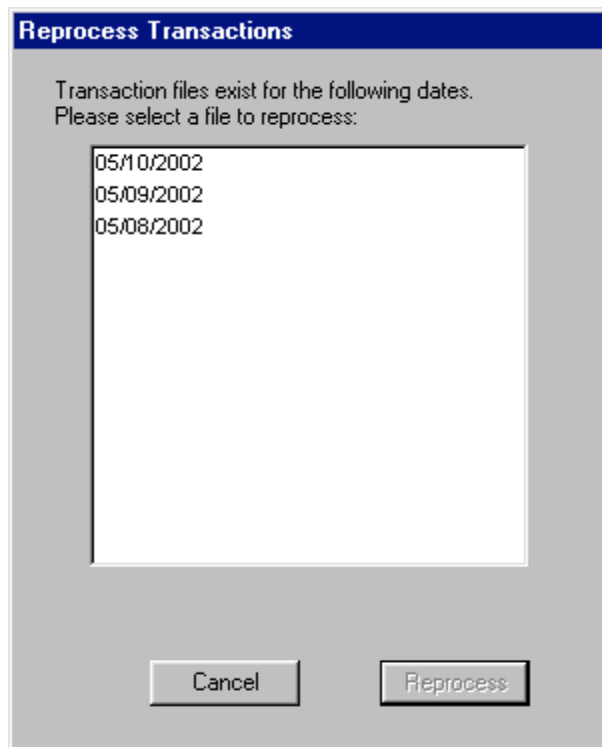


Figure 35: Reprocess Transactions screen for JMC POS Application.

1. Select File-Reprocess Transactions.
2. Click on the transaction file to be reprocessed to select it.
3. Click **Reprocess** to continue OR click **Cancel** to return to the main screen of the JMC POS Application without reprocessing a transaction file.

POS—Begin Breakfast Button

This button is used to begin processing transactions for breakfast.

1. Click **Begin Breakfast**.

Breakfast Line - Friday, May 10, 2002

Meals Served: 6

All Grades

A la carte items

0 Miscellaneous	
1 Toast	0.25
2 Juice	0.25
3 Cereal	0.25
4 Fruit	0.25
5 Roll/Muffin	0.50
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	

Purchases

Student:

Adult

Cash Adult Gr 0-4
Cash Adult Gr 5-8
Cash Adult Gr 9-12
Cash Student Gr 0-4
Cash Student Gr 5-8
Cash Student Gr 9-12
Aahgdahl, Kitty

Delete Clear

7 8 9
4 5 6
1 2 3
0 . Enter

= Brkfst * Ex Milk - Alacarte
+ Cash

Delete A Transaction...

Done

Figure 36: Point of Sale screen for processing breakfast transactions.

2. If necessary, select a pricing group from the menu in the upper right corner of the screen.
3. Process a transaction.
 - a. Identify the customer.
 - i. Student with account - xxx
 - Enter their JMC student number on the keyboard (could also use mouse or up/down arrow keys to select a student from the list in the upper right corner of the screen)
 - The student's name will be highlighted in the list
 - ii. Adult with account - xxx
 - Enter their JMC student number on the keyboard
 - The student's name will be highlighted in the list
 - iii. Guest (cash) student - **00**
 - iv. Guest (cash) adult - **0**
 - b. Identify the type of purchase.

- i. If a lunch/breakfast, press /
 - ii. If an extra milk, press *
 - iii. If an a la carte item, press -, and then:
 - Enter the number of the a la carte item from the list on the left.
 - Repeat step iii. for additional a la carte items.
- c. Identify the payment type.
 - i. Deduct from account.
 - Press Enter.
 - ii. Pay cash for purchase.
 - Press +
 - The amount that the student owes is displayed.
 - Collect that amount from the student.
 - Press Enter.
 - iii. Deduct from account and make simultaneous deposit to account.
 - Press +
 - The amount that the student owes is displayed.
 - Enter the amount that the student is paying.
 - Press Enter.

The following are examples of breakfast transactions and the keystrokes needed to process the transactions.

Example 1: Student 321 purchases a lunch/breakfast.

Press the following keys: 3 2 1 / Enter

Example 2: Student 321 purchases a lunch/breakfast with an extra milk.

Press the following keys: 3 2 1 / * Enter

Example 3: Student 321 purchases a lunch/breakfast with an extra milk and a la carte item #3.

Press the following keys: 3 2 1 / * - 3 Enter

Example 4: Student 321 purchases a lunch/breakfast and also deposits \$20 to their account.

Press the following keys: 3 2 1 / + 2 0 Enter

4. To clear the Purchases window of all pending purchases, press the **Delete/Clear** key.
5. To Delete a Transaction, click **Delete a Transaction....** The screen will appear similar to Figure 37. Then select the transaction you wish to delete and click **Delete**. Repeat this as many times as needed, then click **Done** to return to the main screen of the JMC POS Application.

Delete A Transaction

Select a transaction to delete:

Del	Time	ID	Name	Purchases	Amount
	11:13:36	1884	Aahgdahl, Orville	Student Breakfast	\$ -1.00
	11:16:29	1	Aahgdahl, Kitty	Student Breakfast	\$ -1.00
	11:16:34	2	Aahgdahl, Tina	Student Breakfast	\$ -0.80
	11:16:39	1886	Aahgdahl, Wilbur	Student Breakfast	\$ -1.00
	11:16:51		Cash Adult	Adult Breakfast	\$ -1.15
	11:16:56		Cash Adult	Deposit	\$ 1.15
	11:17:05		Cash Student	Student Breakfast	\$ -1.00
	11:17:09		Cash Student	Deposit	\$ 1.00

Figure 37: Delete a Transaction screen.

6. Continue to process transactions until the serving period has concluded.
7. When the serving period has concluded, click **Done** to return to the main screen of the JMC POS Application. At this point all transactions for the meal just served will be transmitted to the JMC Data folder on the network server. Prior to this all transactions have been saved on a file on the local hard drive of the POS computer.

Note: In the event of a loss of network service, the transaction file can be reprocessed at a later time when network services have been restored. See [POS-File-Reprocess Transactions](#) for details on this procedure.

POS—Begin Lunch Button

This button is used to begin processing transactions for lunch.

1. Click **Begin Lunch**. The screens and procedures are essentially the same as for breakfast. See Figure 36.
-

POS—Clear Alias Button

This button is used in selecting a data folder for the JMC POS Application. This procedure is done only once when the POS Application is first being set up or if the wrong folder is selected.

1. Click **Clear Alias**.
 2. Quit the JMC POS Application.
 3. Restart the JMC POS Application.
 4. Navigate to the JMC Data folder for the appropriate school.
-

Appendix A

Using Credit Cards for Lunch Account Deposits

JMC has working relationships with multiple vendors for accepting credit card payments for family lunch accounts. Please contact JMC technical support at 800-524-8182 or support@jmcinc.com for further details.