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DOCUMENTATION
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Lunch Transaction Details
Lunch Module Update 2014

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Overview

The JMC Lunch Module has gone through a series of updates primarily due to changes in the federal guidelines for free & reduced lunch eligibility reporting.

The updates to the JMC Lunch Module include new tallies and columns for the Status Report, storing of details during a Direct Certification import, editing and storing of details while using the Determine Free and Reduced Eligibility page, and the editing and storing of details while using various aspects of the Edit Student Lunch Data page.

Lunch Status Report updates include breakdowns for the various reasons students were classified as Free or Reduced Price Eligible that correspond with School Food Authority (SFA) needs for reporting via federal report Form FNS-742 School Food Authority Verification Collection Report.

> Section 3 of Form FNS-742 covers the reporting of Direct Certified students according to the following breakdowns: SNAP, not SNAP (TANF, FDPIR, homeless, migrant, runaway, foster, Head Start, Early Head Start), SNAP letter method.

> Section 4 of Form FNS-742 covers the reporting of Free Eligible students according to the following breakdowns: case number (SNAP, TANF, FDPIR), household size and/or income, reduced price eligible (household size and/or income).

> Section 4 of Form FNS-742 also covers the reporting of Reduced Eligible students according to the following breakdowns: household size and/or income.

> Section T-1 of Form FNS-742 is Total Free Eligible Students Reported.

> Section T-2 of Form FNS-742 is Total Reduced Price Eligible Students Reported.

These sections in Form FNS-742 correspond to breakdowns in the JMC Status Report. The tallies in the JMC report are based on details that may be stored in the lunch transactions detail records.

Some of the lunch transaction detail updates were introduced in Fall 2013. These included updates to the Direct Certification Import option where details about the direct certification record were stored automatically. Also included was the ability to add and/or edit details for a transaction on the Edit Student Lunch Data page.

Updates to the Lunch Status report, the Determine Free or Reduced page, and more changes to the Edit Student Lunch Data page were added beginning with the 031214 build.

Direct Certification

This option was updated to store as many details as possible while importing a Direct Certification file generated by your state department or from your state department's website (files vary by state).

If your Direct Certification records do not contain any details it may be that you had imported your Direct Certification file using an earlier build or that you created the Direct Certification records manually on the Edit Student Lunch Data page.

Determine Free Or Reduced Lunch Status

This option was updated to store appropriate details when creating lunch status change-related records in the student's lunch transaction data.

When using this option, the screen will first appear similar to Figure 1.

Figure 1

Determine Free or Reduced Status page - Yearly Income Entered for Earner 1

Once the income amount(s) are entered for the earner(s), click the Calculate button and the screen will give you additional options and information (varies depending upon income). See Figure 2.

Figure 2

Calculated as Free Eligible based on Income – also denoted as Error Prone

Once the calculation is done you will see options for selecting a lunch contact and will then be allowed to generate lunch status changes for the students with that lunch contact.

Please note, however, that no lunch status records are generated by this option unless the button **Make Dependents 'Free'** (or if appropriate **Make Dependents 'Reduced'**) is clicked.

If either of these buttons are present on the screen and are clicked, then the corresponding lunch status records are generated. These records would include a Status Change record as well as Determination Made – Eligible for Free (or Reduced) record. These records may subsequently be viewed on the Edit Student Lunch Data page for the affected students. While this in itself is not new, what is new is that details will now be recorded along with Determination Made – Eligible for Free (or Reduced) record, such as setting the checkbox for "Approved Based on Income and or Household Size" and, if appropriate, setting the checkbox for "Error Prone" if the income used for determining the status changes was within $100 monthly or $1200 annually of the free or reduced income thresholds.

Edit Student Lunch Data

This option was updated to allow for editing of details for certain types of student lunch transaction records. Also, when new student lunch transaction records are created via the **New** button on this page the user is prompted to enter details for that record.

Student lunch transaction record types that include a details option are as follows:
- Application Received
- Determination Made – Approved for Free
- Determination Made – Approved for Reduced
- Determination Made – Denied Due to Earnings
- Determination Made – Denied - Other
- Eligibility Letter Generated
- Eligibility Letter Sent
- Direct Certification – Approved for Free
- Determination Made – Approved for Free Last Year
- Determination Made – Approved for Reduced Last Year
- Hawki Insurance Declined (Iowa only)

All other student lunch transaction record types do not have a details option at this time.

Figure 3 shows an example of how lunch transaction records that permit details may be viewed and edited on this page. If your mouse cursor hovers over the Info icon you can see a preview of the details for the record.
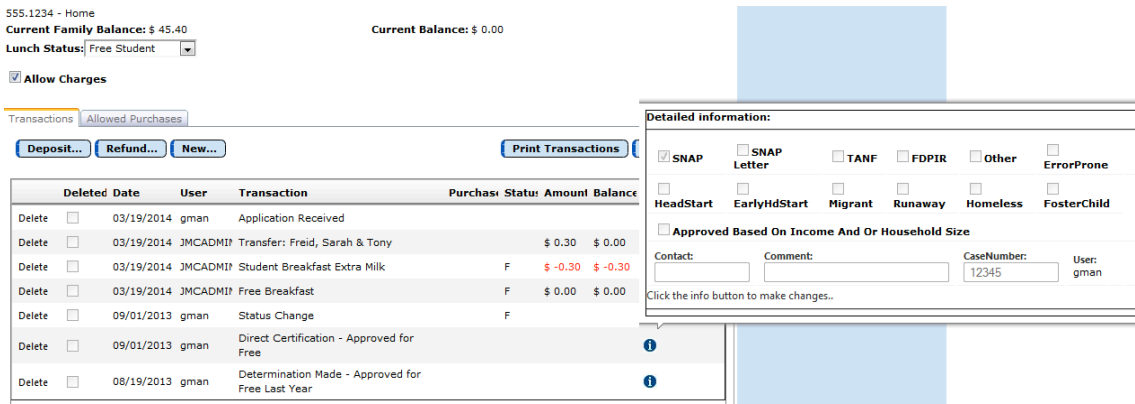
Figure 3: Edit Student Lunch Data page with Details displayed
when mouse hovers over Info icon.

To edit the Details for a student lunch transaction record, click on the Info icon and the screen will appear similar to Figure 4.
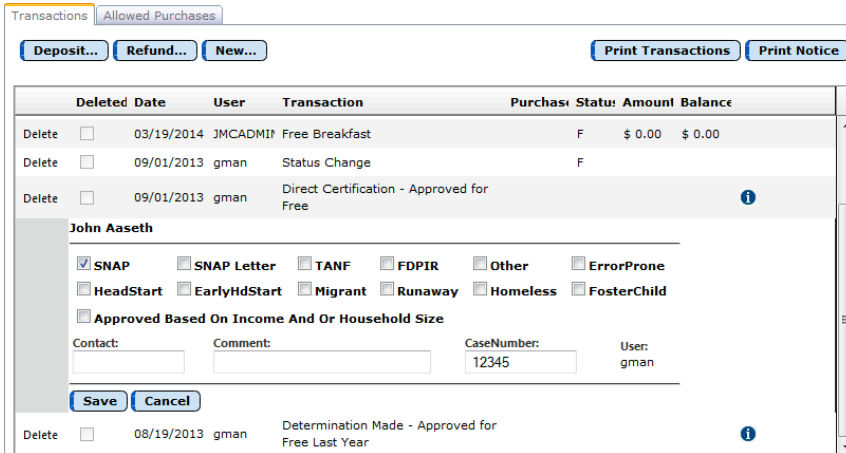

Figure 4

Editing the Details for a Student Lunch Transaction Record

After updating the record, click the **Save** button at the bottom of the Details section.

To manually add a new student lunch transaction record, click on the **New** button just above the list of transaction records. A dialog will pop up similar to Figure 5.
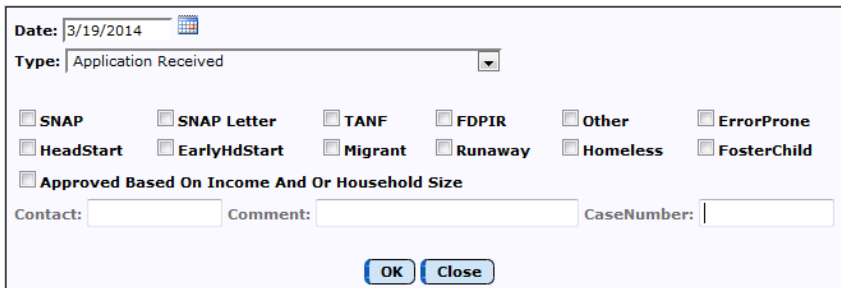
Figure 5

Manually Adding a New Student Lunch Transaction Record

Next, specify the record type and any pertinent details and then click **OK**. You will then return to the Edit Student Lunch Data page with the new record included in the list of transactions as displayed in Figure 6.

	Deleted	Date	User	Transaction	Purchase	Status	Amount	Balance	
Delete	☐	03/19/2014	gman	Application Received					ⓘ
Delete	☐	03/19/2014	JMCADMIN	Transfer: Freid, Sarah & Tony			$ 0.30	$ 0.00	
Delete	☐	03/19/2014	JMCADMIN	Student Breakfast Extra Milk	F		$ -0.30	$ -0.30	
Delete	☐	03/19/2014	JMCADMIN	Free Breakfast	F		$ 0.00	$ 0.00	
Delete	☐	09/01/2013	gman	Status Change	F				
Delete	☐	09/01/2013	gman	Direct Certification - Approved for Free					ⓘ
Delete	☐	08/19/2013	gman	Determination Made - Approved for Free Last Year					ⓘ

Figure 6

New Manually Created Record Displayed

Lunch Status Report

This option was updated to include breakdowns for the various reasons students were classified as Free or Reduced Price Eligible that correspond with School Food Authority (SFA) needs for reporting via federal report Form FNS-742 School Food Authority Verification Collection Report.

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Section T-1 of Form FNS-742 is Total Free Eligible Students Reported.

Section T-2 of Form FNS-742 is Total Reduced Price Eligible Students Reported.

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Figure 7 displays a sample report that includes the new tallies.

Figure 7: Lunch Status Report now includes Breakdowns by Detail Groups

New tallies have been added to this report:
- Direct Certified – SNAP
- Direct Certified – Not SNAP *(TANF, FDPIR, Other, HeadStart, EarlyHeadStart, Migrant, Runaway, Homeless, FosterChild)*
- Direct Certified – SNAP Letter Method
- Direct Certified – no Details
- Direct Certified – Total
- Determination Made – Approved for Free – Categorically Eligible *(has case number)*
- Determination Made – Approved for Free – Income and/or Household Size
- Determination Made – Approved for Free – no Details
- Determination Made – Approved for Free – Total
- Determination Made – Approved Reduced – Income and/or Household Size
- Determination Made – Approved Reduced – no Details
- Determination Made – Approved Reduced – Total

BEST PRACTICES FOR STATUS REPORT & TRANSACTION DETAILS

For best results with these new breakdowns in the Lunch Status Report, the tallies for Direct Certified – no Details, Determination Made – Approved for Free – no Details, and Determination Made – Approved for Free – no Details should be 0. If any of those 3 tallies are not 0 then there are pertinent records for which the details are incomplete in some way.

For example, if there is a Direct Certification – Approved for Free record for a student but none of the checkboxes have been checked, then that record cannot be included in any of the 3 tallies above that line. Most likely you will want to supply the detail for how that student was Direct Certified.

To correct this situation, look in list of students within the appropriate section of the Lunch Status report (Figure 7) and locate students with a value of "N" in the Details column. These are the students whose records will need additional data entered. To enter this data, go to the Edit Student Lunch Data page, locate a student that needs additional data, locate the record to be edited (Direct Certification – Approved for Free is cited in the previous paragraph), click on the Info icon for that record, make the appropriate edits, click OK to save the changes.

Once you have edited the necessary records you may want to generate a new Lunch Status report and verify that the "no Details" tallies are down to 0. If not, continue this process until the "no Details" tallies are down to 0.

If you are having problems getting a particular student's details corrected, you may have multiple records with the pertinent transaction types in that student's lunch transaction records and you may be editing a record that is not impacting the totals for this report. In some cases you may have extra records in the lunch transaction data that may need cleaning up. If you need assistance in determining which record(s) to edit, please contact JMC technical support at 800-524-8182.

This kind of edit-and-check routine is very similar to what happens when working with state reporting data – keep updating the data until you have fixed everything possible.