



CenterPilot

Training Handbook for Centers/Sites



Updated 1/22/2020

CENTERPILOT FACILITY/SITE TRAINING CHECKLIST

CENTER NAME: _____

Person(s) Trained: _____ Trainer: _____

Table of Contents

Date Trained

1. Facility Home Page	_____	page 2
2. Facility Information	_____	pages 3-4
3. Manage Classrooms	_____	page 4
4. Participant Enrollment	_____	pages 4-6
5. Electronic Signatures	_____	page 5
6. Meal Service	_____	pages 7-11
7. Create A Pre-Saved Meal	_____	pages 8-10
8. Create A Pre-Saved Meal Week	_____	pages 10-11
9. Schedule A Pre-Saved Week	_____	page 11
10. Take Meal Attendance	_____	pages 11-12
11. Meal Report: Meal Production Record	_____	pages 12-13
12. Attendance Template	_____	page 12
13. Recording Expenses	_____	pages 13-14
14. Point of Service Failure	_____	page 14
15. Printing Menus to Post	_____	page 15
16. Submitting the Claim	_____	pages 14-15
17. Other Reports	_____	pages 15-16
18. List of All CenterPilot Reports	_____	pages 16-17



CENTERPILOT FACILITY/SITE TRAINING HANDBOOK

Disclaimer: Please note that enhancements to CenterPilot are made almost daily and that some of the instructions in this document may be slightly outdated. We will strive to update and post this document often at www.centerpilot.com. We ask that you check back often for updated versions.

Warning to Centers/Sites: It is recommended that you train your employees to use the efficient 3 level **CenterPilot Perfect Flight Plan** which utilizes the 3 functions of: **1) CREATE PRE-SAVED MEAL, 2) CREATE PRE-SAVED MEAL WEEK, AND 3) SCHEDULE A PRE-SAVED WEEK**. Using either of the other 2 meal creation methods limits the features, advantages and benefits of the **CenterPilot Perfect Flight Plan**.

1. FACILITY HOME PAGE:

- a. **INSTRUMENT PANEL:** This colorful week at a glance grid shows the daily progress of each meal service. The LEGEND defines the color codes:
 - i. **Red** - no meal or attendance scheduled.
 - ii. **Yellow** - meals scheduled and ready for attendance.
 - iii. **Green** - Attendance has been taken and the meal is complete.
 - iv. **Purple** – The amount of food served was not enough for the numbers of children marked in attendance at the meal.
 - v. **Yellow** with **Red** Outline – A scheduled meal with attendance was edited and requires a re-save of the attendance (note, only one classroom requires re-saving).
 - vi. **Dark Green** - The edited meal has been adjusted to the numbers in attendance and the attendance was re-saved.
 - vii. **Green** (in the Day has WG column) confirms a whole grain component is planned for the day.
 - viii. Note that the Instrument Panel only reflects activity during the current week. To view the entire month at a glance, click on the *Calendar* icon below the legend.
- b. **ELIGIBILITY RATIO:** The Eligibility ratio meter reflects the Free/Reduced/Paid Ratio at the moment. A “for-profit” center, must have at least 25% of all enrolled children at the free or reduced level.
- c. **MILK RECEIPT SUMMARY FOR CURRENT MONTH:** This grid tracks the facility’s milk purchases and indicates if enough milk (by type) has been purchased. The planned, served and purchased milk for the month includes all milk (whole, skim, and non-dairy).
 - i. Planned Milk indicates the amount of milk needed according to the number of meals scheduled (planned) regardless of attendance.
 - ii. Served Milk indicates the amount of milk that was actually required/served based on the attendance taken for the meal.
 - iii. Purchased Milk indicates the amount of milk that was actually on-site (according to the entered receipts).

- iv. Skim Milk (planned, served and purchased) is on the top line. A red negative number in the Purchase Diff column indicates that enough skim milk was not available for the number of children ages two and above in attendance at one or more meals.
- v. Whole Milk (planned, served and purchased) is on the second line. A red negative number in the Purchase Diff column indicates that enough whole milk was not available for the number of children (age one) in attendance at one or more meals.
- vi. Non-Dairy Milk (planned, served and purchased) is on the third line. A red negative number in the Purchase Diff column indicates that enough non-dairy milk was not available for the number of children requiring alternate milk in attendance at one or more meals.
- vii. Note that if meals are scheduled a whole month in advance, the planned and served amounts may be very different until the end of the month. If meals are scheduled a week in advance, the planned and served amounts should be very close by the end of the week. If receipts for milk are entered on a weekly basis, all three numbers (Planned, Served and Purchased) should match up on a weekly basis. Planned milk represents the amount poured (that leaves the kitchen) and should always be accurate.
- d. **FACILITY/SPONSOR MESSAGES:** The message box is used to send and receive messages between the facility and the sponsor. After reading the received messages, select *Hide* to remove them from the home page. Archived messages may be retrieved from Facility/Message History.
- e. **PARTICIPANTS WITH INCOMPLETE FORMS:** This list is on the home page to notify the facility immediately that required enrollment or eligibility paperwork may need to be collected from parents and forwarded to the sponsor. New participants appear here as well as participants with expired forms and participants with forms that will expire soon.

2. FACILITY:

- a. **FACILITY INFORMATION:** This is the general information about the center that is entered by your sponsor. If any information is incorrect, contact your sponsor.
 - i. Facilities may edit the *Meal Attendance Sort* to be *Alphabetical* (by last name), *Classroom* or *Age Group*.
 - ii. Facilities should add names of staff who will take attendance and attend sponsor trainings to the *Facility Staff* list on the left.
 - iii. Facilities should add vendors to the list on the left. Vendors must be added in order to add receipts. Vendors may be store names such as Kroger or Walmart, or may be vendors who deliver food such as US Foods or Ben E. Keith.
 - iv. All other fields must be changed by your sponsor.
- b. **TAB - # ATTENDING MEALS:** Enter the estimated numbers of expected children by age group for each meal. Be sure to include infants if they are enrolled in the facility. These numbers are the **planned** total, not the **exact attendance**, and are used in the *Meal Production Records* and the *Cooking Detail* to calculate how much to of each food

component to open. The estimated numbers may need to be modified weekly or monthly if there is a fluctuation of more than 1 or 2 participants.

- c. Note that estimated meal numbers may be entered by using a past date. Using the area below the grid, select the past date and the meal type to change and Click on *Use This Date & Meal For Default Attendance Counts* and Click *Save # Attending Meals*. NOTE THAT THE NEW ESTIMATED NUMBERS WILL BE USED GOING FORWARD UNTIL CHANGED AGAIN.
- d. **TAB - MEALS SERVED:** These are the meals and meal service times approved by your sponsor. If a change to the meal schedule is needed, contact your sponsor.
- e. **TAB - OPERATING SCHEDULE:** These are the days and hours of operation that are approved by your sponsor. If a change to the days and hours of operation is needed, contact your sponsor.
- f. **TAB – SPONSOR INFO:** This is the contact information for your sponsor.
- g. **MANAGE CLASSROOMS:**
 - i. To ADD a classroom, enter the name in the *Add New Classroom* box and click *Add Classroom* button.
 - ii. To EDIT the name of a classroom, click *SELECT* next to the classroom to edit, and enter the new name in the *Editing Classroom* box.
 - iii. To see a list of participants in a classroom, select the *Display Classroom Only* button. To see a list of all participants in the facility, select the *Display All Participants* button.
 - iv. To reassign children to classrooms while in the lists to the right, click on the drop down menu next to the name and select another classroom. Note that classrooms may also be edited from the *Participant Eligibility* Screen.
- h. **MESSAGE HISTORY:** Archived messages received from your sponsor or sent to your sponsor are available here. Select the date range and the type of message to view (*Received* or *Sent*). Archived messages will appear in the box to the right.

3. PARTICIPANTS:

- a. **PARTICIPANT INFORMATION:**
 - i. To ENROLL a new participant, be sure the grid to the right is empty and begin typing in the fields.
 - ii. Complete the first two rows, then click *Save Participant Information*.
 - iii. Continue completing the fields in yellow to pre-populate the required forms.
 - iv. The child may be assigned to a classroom here, or it may be done later in *Manage Classrooms*.
 - v. Be sure to include gender, race and ethnicity.
 - vi. Indicate if a child requires a special diet or alternative milk. Note that if a participant is marked as receiving special milk, the total milk served in attendance to this participant will calculate separate in the *Milk Bank* and Milk Reports from the dairy milk totals.
 - vii. To set times in care that are the same for every week day, enter the arrival and departure times and click the red *Use For M-F* box, then click *Save Participant Information*. To enter the same times for the weekend days, enter the arrival

and departure times and click the red *Use For S-S* box, then click *Save Participant Information*.

- viii. Once participant information is saved, only your sponsor may edit certain fields.
- ix. Adding Electronic Signatures: Electronic parent signatures may be captured and saved for participants allowing enrollment to be complete WITHOUT printing enrollment forms.
 - 1. After enrolling a new child and clicking SAVE, notice that a box appears to the lower left. This box is to capture and store a signature. A pencil box also appears within the signature box.
 - a. To have the parent sign on a desktop computer, they must use a mouse.
 - b. To have the parent sign using a finger, enter the information on the desktop, then bring up the screen on a phone or tablet and allow the parent to sign using their finger.
 - 2. In the pencil box, click on the down arrow next to line size to choose a thicker line. Line width "7" works the best. You may move the pencil box out of the way so the parent has more room to sign in the signature box. When you move your mouse over the word "pencil" it will make a diamond shape. Click the box and drag it out of the way.
 - 3. Using the tablet, hand it over to the parent to sign. The date will be the current date and cannot be changed to any other date.
 - 4. If the signature does not turn out as expected, click the drop down arrow on the upper right of the Signature Box (big box) and select *Undo*. OR if there is not a drop down arrow in the upper left, click the arrow in the upper right to undo. Once you have a signature you are satisfied with, click *Save* from the same drop down menu in upper left OR the save icon in upper right.
 - 5. Once the signature in the box has been saved, notice a message appear under the box indicating that it has been saved.
 - 6. Click the *Save Participant Information* button above the box, and the signature will save to the enrollment form.
 - 7. Click on the enrollment form icon to see the completed enrollment form with a signature and date. Your sponsor also has the completed form as well, and should not need a faxed or emailed copy. However, be sure to confirm this with your sponsor.
- x. Once participant information is saved, enrollment and eligibility form icons will appear and show as incomplete in the Participant Summary section below. Click on these icons to view and print these forms to be completed and signed by the parent.
- xi. **TAB - PARTICIPANT ELIGIBILITY:** This is sponsor use only. Once the sponsor validates the eligibility status of the participant, the information will show up here.
- xii. **TAB - DAYS ATTENDING:** Enter or edit the arrival and departure information for the participant and indicate which meals the participant will have while in care.

- xiii. **TAB - GUARDIAN INFORMATION:** The address and home phone number will populate from the participant information screen. Add the name, work phone number, cell phone number and email address of the guardian here.
- xiv. **ENROLL SIBLINGS:** To enroll a sibling without having to enter the same address and parent information:
 - 1. Be sure the participant to copy from is showing on the screen
 - 2. Click *Use This Participant for Copy*.
 - 3. Enter the first name, last name and date of birth of the sibling.
 - 4. A classroom may also be assigned to the sibling here if desired.
 - 5. Click *OK*. When the screen refreshes, **BE SURE to click on *Save Participant Information***.
 - 6. Notice that the address, times in care and guardian information copied to the sibling.
 - 7. Click on the forms icons at the bottom to print enrollment and eligibility information.
- xv. **DROP PARTICIPANTS:** To drop a participant who is no longer enrolled in the facility:
 - 1. Select the *Drop Participant button*. This action will remove the participant from the *Active* participant list and move him to the *Dropped* participant list.
 - 2. If a participant is removed from enrollment, the name of the participant will be immediately removed from the attendance screen. **Please ensure the attendance for this participant has recorded up to this date.**
 - 3. CenterPilot does not remove a participant from the Free/Reduced/Paid category for the remainder of the month in which the participant is dropped. The enrollment will not count in the month following the drop date of the participant. For example, if a participant is dropped on January 15th, the participant's enrollment will remain in place for the remainder of the month. However, the participant's enrollment will not remain in place for the month of February.
- xvi. **REACTIVATE PARTICIPANTS:** To reactivate a participant who has been dropped:
 - 1. Select *Dropped* in the upper left of the screen.
 - 2. Select the participant and click *Reactivate Participant*.
 - 3. Select *Active* in the upper left of the screen to see the reactivated participant show up in the *Active* list.
- xvii. If a participant who is already in the database is added again, CenterPilot will give an error message that a participant with that name and date of birth already exists in the database.

IMPORTANT: If a mistake is made when enrolling a participant, please DO NOT start over with a corrected participant. This will create 2 students with free/reduced/paid statuses in the facility's ratio. Please call your sponsor to correct the error on the original entry.

4. CREATING AND SCHEDULING MEALS:

In CenterPilot, there are 3 ways to schedule a meal. This manual will cover all 3 methods, but please note that CenterPilot's efficiency is enhanced when facilities use the **CenterPilot Perfect Flight Plan** involving the 3 functions listed here: **1) CREATE APRE-MADE MEAL, 2) CREATE PRE-MADE MEAL WEEK AND 3) SCHEDULE A PRE-MADE MEAL WEEK.** This 3-part method ensures all of the functions, advantages and benefits of CenterPilot are available to the client.

- a. **Method #1:** Schedule a meal NOT using the Create Pre-Saved Meals and/or Create Pre-Saved Meal Week method (Slowest and Least Efficient):
 - i. Visit the *Meal Calendar* page to determine where a meal needs to be scheduled.
 - ii. From the Menu at the top, select *Meals*, then *Create/Edit Participant Meals*.
 - iii. Select *Infant* or *Non-Infant*.
 - iv. Select the *Meal Type* from the Meal drop down menu (Breakfast, AM Snack, Lunch, PM Snack, Supper or EV Snack).
 - v. Select the *Meal Date*.
 - vi. Confirm that the *Expected Attendance* at the bottom is correct for this meal type and date.
 - vii. On the right side, begin selecting the individual food components to be served from the drop down menus.
 1. In CenterPilot, food components are chosen from general to specific (ex: cereal, brand name, name/type, box/container size).
 2. Be sure to select the items by weight or package size that matches the weight and package of the item purchased/served.
 3. Each item will populate the *Cooking Detail* grid to indicate how much is needed (exact amount), and how much should be open (will round up to the nearest ½ container). This amount is recorded in the *Meal Production Records* as the amount served.
 4. When this meal is saved, the corresponding quantities will be permanently recorded.
 5. Be sure to select whole grain components from the appropriate drop down menu so that CenterPilot will give credit for a daily whole grain component.
 6. TIP: If there are only 3 or 4 children at a meal, it may be beneficial to choose milk by the cup, as opposed to milk by the gallon. If a gallon is chosen, the smallest amount recorded will be 8 cups (or ½ gallon). This will overstate the actual milk consumption on the *Meal Production Record*.
 7. As each meal component is selected, notice:
 - a. The drop down menus on the right will become unavailable as the associated food choices are made.
 - b. The *Meal Error* in red that is associated with that meal component will disappear from the *Meal Error* grid.
 - c. The selected meal component will appear in the *Cooking Detail* grid on the bottom left and will show the correct calculations

from the Food Buying Guide according to the expected attendance.

- viii. The *Save This Meal* button remains non-live until a complete, creditable meal is created.
 - ix. Once a complete and creditable meal is created, click the *Save This Meal* button.
 - x. Return to the *Meal Calendar* page to observe the newly created meal (should show up in yellow). Notice that since it is NOT a Pre-Saved meal named with the components of the meal, it will only show up as a meal type (ex: CHILD – BK for a non-infant breakfast).
 - xi. If this meal is created with a date in the **current week**, the *Instrument Panel* on the *Facility Home* screen will change from red to yellow indicating a meal is scheduled and attendance for this meal may now be recorded.
- b. **Method #2:** Schedule a meal using a Pre-Saved Meal but NOT using the Pre-Saved Meals Week method (Slow and Inefficient):
- i. Visit the *Meal Calendar* page to determine where a meal needs to be scheduled.
 - ii. From the Menu at the top, select *Meals*, then *Create/Edit Participant Meals*.
 - iii. Select *Infant* or *Non-Infant*.
 - iv. Select the *Meal Type* from the Meal drop down menu (Breakfast, AM Snack, Lunch, PM Snack, Supper or EV Snack).
 - v. Select the *Meal Date*.
 - vi. Confirm that the *Expected Attendance* at the bottom is correct for this meal type and date.
 - vii. Choose a *Pre-Saved Meal* from the drop down menu on the left.
 - viii. Notice that the *Pre-Saved Meal* will cause drop down menus on the right to become unavailable, the *Meal Errors* in red to the right will disappear from the *Meal Error* grid, and the components of the Pre-Saved Meal will appear in the *Cooking Detail* grid on the bottom left and will show the correct calculations from the Food Buying Guide according to the expected attendance.
 - ix. Click the *Save This Meal* button.
 - x. Return to the *Meal Calendar* page to observe the newly created meal (should show up in yellow). Notice that since it is NOT a Pre-Saved meal named with the components of the meal, it will only show up as a meal type (ex: CHILD – BK for a non-infant breakfast).
 - xi. If this meal is created with a date in the current week, the *Instrument Panel* on the *Facility Home* screen will change from red to yellow indicating a meal is scheduled and attendance for this meal may now be recorded.
- c. **Method 3:** known as the **CenterPilot Perfect Flight Plan** involving the 3 functions listed here: 1) CREATE PRE-SAVED MEAL, 2) CREATE PRE-SAVED MEAL WEEK AND 3) SCHEDULE A PRE-SAVED WEEK.
- i. **CREATE A PRE-SAVED MEAL:** The first step in the **CenterPilot Perfect Flight Plan** is to Create a Pre-Saved Meal.
 - 1. From the Menu at the top, select *Pre-Saved Meals*, then *Create Pre-Saved Meal*.
 - 2. Select *Infant* or *Non-Infant*.

3. Select the *Meal Type* from the Meal drop down menu (Breakfast, AM Snack, Lunch, PM Snack, Supper or EV Snack).
4. Confirm that the *Expected Attendance* at the bottom is correct for the normal attendance for each age group at this meal type.
5. In the *Pre-Saved Meal Name to Use* box, begin typing the name of the Pre-Saved Meal...**STOP! PLEASE READ...**
6. To allow the **CenterPilot Perfect Flight Plan** to work effectively, please name the Pre-Saved meal ACCORDING TO THE MEAL COMPONENTS in the meal.
 - a. For example: DO NOT use “Breakfast 1” or “Monday Lunch”, etc. as the name of the Pre-Saved Meal.
 - b. Instead use: WG Beef Spaghetti, Green Beans, Apples, Milk.
 - c. Be sure to indicate in the NAME of the meal IF A WHOLE GRAIN is used by indicating “WG” for whole grain or “AWG” for all whole grain or anything else that works for the facility.
 - d. THIS WILL BECOME MORE IMPORTANT AS THE **CenterPilot Perfect Flight Plan** PROCEEDS! PLEASE DON'T SKIP THIS STEP!
7. On the right side, begin selecting the individual food components to be served from the drop down menus.
 - a. In CenterPilot, food components are chosen from general to specific (ex: cereal, brand name, name/type, box/container size).
 - b. Be sure to select the items by weight or package size that matches the weight and package size of the item purchased and served by the facility.
 - c. Each item will populate the *Cooking Detail* to indicate how much is needed (exact amount), and how much should be opened (amount to open will round up to the nearest ½ container). This amount is recorded in the *Meal Production Record* as the *Amount Served*.
 - d. When this meal is saved, the corresponding quantities will be permanently recorded.
 - e. Be sure to select whole grain components from the appropriate drop down menu so that CenterPilot will give credit for a daily whole grain component.
 - f. TIP: If there are only 3 or 4 children at a meal, it may be beneficial to choose milk by the cup, as opposed to milk by the gallon. If a gallon is chosen, the smallest amount recorded will be 8 cups (or ½ gallon). This will overstate the actual milk consumption on the *Meal Production Record*.
 - g. As each component is selected, notice:
 - i. The *Meal Error* in red that is associated with that meal component disappears from the *Meal Error* grid.

- ii. The selected meal component will appear in the *Cooking Detail* grid on the bottom left and will show the correct calculations from the Food Buying Guide according to the expected attendance.
- 8. The *Save This Meal* button will remain non-live until a complete and creditable meal is created.
- 9. Once a complete and creditable meal is created, click the *Save This Meal* button.
- 10. Now click on the *Select Pre-Saved Meal* drop down menu to see the newly created meal in the list.
- 11. To edit a Pre-Saved Meal, select the meal from the drop down menu and edit any of the components (for example: change the size of the container purchased from a 28 oz. can to a 78 oz. can). Simply replace the contents with the update and click *Save This Meal*.
- 12. To view a list of ALL Pre-Saved Meals saved for the facility, click on *Pre-Saved Meals* from the menu at the top and select *Pre-Saved Meals List*.
 - a. Select the *Meal Type*
 - b. Select *Infant* or *Non-Infant*
 - c. All Pre-Saved Meals of this type associated with this facility will appear in the grid to the right with the meal components.
- ii. **CREATE A PRE-MAILED MEAL WEEK:** The second step in the **CenterPilot Perfect Flight Plan** is to Create a Pre-Saved Meal Week.
 - 1. From the Menu at the top, select *Pre-Saved Meals*, then *Create Pre-Saved Meal Week*.
 - 2. In the *Select Pre-Saved Meal Week to Edit* box to the right, name the week, (for example: "Week 1", "Summer Week 4", or "Red Week".
 - 3. Click on *Select Weekday* to the left and select the first day of the week (note that in CenterPilot, weeks begin on Monday and end on Sunday).
 - 4. From the drop down menus on the right, begin adding the Pre-Saved Meals for the meals the facility serves (ex: Breakfast, Lunch and PM Snack).
 - 5. If the facility has enrolled infants (under 1 year of age), be sure to also select infant meals below the *Child/Adult* meal grid (if pre-saved infant meals have not yet been created, do so now and return to this function when finished).
 - 6. As *Pre-Saved Meals* are selected from the drop down menus, notice:
 - a. Since the *Pre-Saved Meals* are named with the components of the meals, it is easy to know exactly what meal (and what meal components) is selected.
 - b. Since the *Pre-Saved Meals* include the indication of whole grain in the name, it is easy to see if a whole grain is included in the day (note that CenterPilot includes an edit check by not allowing a day to be saved without a whole grain component).

7. When each day is complete with all non-infant and infant menus that the facility serves, Click on the *Save This Day's Pre-Saved Meals* button to the left. Notice:
 - a. A *Completed Pre-Saved Days Meals* grid begins to build in the bottom left. This grid reveals what meals are included daily in this Pre-Saved Week for non-infants and infants.
 8. When all days of the week are complete, the Pre-Saved Week is finished.
- iii. **SCHEDULE A PRE-MAILED WEEK:** The third step in the **CenterPilot Perfect Flight Plan** is to Schedule a Pre-Mailed Week.
1. Visit the *Meal Calendar* page to determine where a week of menus needs to be scheduled.
 2. From the Menu at the top, select *Pre-Mailed Meals*, then *Schedule a Pre-Mailed Week*.
 3. Confirm that the estimated numbers of participants to be served by age group is correct by glancing at the grid in the upper right. If the numbers are not correct for the week about to be scheduled, return to the *Facility Information/# Attending Meals* screen to update and save the default estimated numbers.
 4. In the upper left, from the date/calendar cell, select the Monday of the week to be scheduled (note that in CenterPilot, weeks begin on a Monday and end on a Sunday).
 5. From the *Select Pre-Mailed Meal Week to Edit* drop down menu, select the name of the meal week to schedule.
 6. Click *Save This Week Schedule*.
 7. Return to the *Meal Calendar* page to observe the newly created week (should show up in yellow). Notice that since the week was created using the **CenterPilot Perfect Flight Plan** which utilizes Pre-Mailed meals named with the components of the meal, it will show the components of the meal in the calendar.
 8. If this meal week is the current week, the *Instrument Panel* on the *Facility Home* screen will change from red to yellow indicating meals are scheduled and attendance for these meals may now be recorded.

5. TAKE MEAL ATTENDANCE:

CenterPilot is designed to take attendance at the point of meal service using a tablet or hand held device. Note that there must be a meal scheduled in order to mark attendance for the meal. Check the *Instrument Panel* on the *Facility Home* screen or the *Meal Calendar* to verify a meal is scheduled.

- a. The *Attendance Sort* is set on the *Facility Information* screen. *Attendance Sort* may be:
 - i. Alphabetical,
 - ii. by Classroom, or
 - iii. by Age Group.
- b. From the menu at the top, Select *Attendance*, then *Take Meal Attendance*.

- i. Select the *Meal Type* from the drop down menu.
 1. Note that the *Date* will automatically populate to today.
 2. Select the *Classroom or Group* from the drop down menu.
 3. Mark meal attendance by clicking the *Attend This Meal* box next to each participants' name.
 4. Mark the *Daily Attendance* box if the participant is present but is not being claimed for the meal.
 5. To select several participants in the classroom or group at once, click the *Select All* box at the top, then uncheck any participants not present.
 6. To Unselect all participants, Select the *Unselect All* box at the top.
 7. Click *Save Attendance* and select the next classroom or group.
 8. Note the *Instrument Panel* on the *Facility Home* page will now reflect bright green to indicate the meal is complete.
- c. **ATTENDANCE TEMPLATES:** If the facility will mark attendance on paper and enter it in CenterPilot later, a *Meal Attendance Template* with participant names and ages may be printed from *Attendance/Meal Attendance Templates*. Select the *Attendance Template* that corresponds to the Attendance Sort of the facility (Alphabetic (by last name); by Classroom or by Age Group). The other report choices will not generate data.

6. MEAL REPORTS:

- a. **MEAL PRODUCTION RECORD:** This report informs the cook or vendor how much food should be purchased and prepared for every meal scheduled. Facilities will print this after scheduling meals for the week and may want to post in the kitchen.
 - i. From the menu at the top, select *Meal Reports* and then *Meal Production Reports* and print one for infants (if applicable) and one for non-infants.
 - ii. The cook should be sure to open the amount of each component noted in the *Quantity Served* column.
 - iii. The *Quantity Served* (which is the amount to open and serve) for each food component is rounded up to ensure enough food is prepared and to accommodate for spillage and hungry growing children. As long as the Planned/Estimated numbers of children by age group are entered into CenterPilot correctly, and the cooks are preparing and serving the amounts shown in the *Quantity Served* column, enough food will be prepared and served.
 - iv. At CenterPilot, one of our core beliefs is that cooks were hired to cook, not to do math. No kitchen math is required to determine how much to open, ensuring that the cook or vendor purchases and prepares the correct amount of food.
 - v. It is not necessary for cooks to enter the actual amounts prepared since that is reflected in the *Quantity Served* column, resulting in less work required to show the same results. However, the cook should note changes or additions manually on this record if they are not saved online. These changes can be entered after attendance if necessary.
 - vi. Note: facilities are required to record how much they open and serve (quantities) to participants. This information (if different than what is recorded in *Quantity Served* column should be recorded in the *Substitution or Amt Served*

column of this record. When a monitor arrives to review a meal service, the meal records will be considered incomplete if they do not accurately reflect the meal service.

- vii. Note: If the facility has planned for 16 school-aged children (1 gallon of milk or 16 cups) and only 14 children of the same age group attend, there is no need to change the record if a 1 gallon of milk was served to the 14 school-aged children. However, if the facility planned for 16 school-aged children and only 8 attend, only a half-gallon was actually served, not a whole gallon. This is an example of when the facility should edit the amount of food served. To edit the amount of food served:

1. From the menu at the top, Select *Meals* and then *Create/Edit Participant Meals*.
2. Select the *Meal Type* and the *Date* of today's meal.
3. Update the number of school-age children in the *Estimated Attendance* to 8 and Click on *Save This Meal*.
4. This will adjust the *Quantity Served* in the *Meal Production Record* to the true and accurate amount served.

7. RECORDING EXPENSES/RECEIPTS:

Sponsors must ensure their sites are operating non-profit food service operations. In order to ensure the facility is in compliance, your sponsor may request that receipts are entered into CenterPilot.

- a. From the menu at the top, Select *Receipt* then *Receipt Entry*.
- b. Select the correct claim month from the drop down menu in the upper left.
- c. In the *Receipts for this Claim* section in the middle of the screen, enter each receipt.
 - i. Select the *Date*.
 - ii. Select the *Receipt Type* (*Store Name* for a purchase; *Wages* to show that CACFP funds were used to pay an employee or *Donation* to record donated milk, etc.)
 - iii. Select the *Vendor* from the drop down menu. Note: Vendors must be entered on the Facility Information screen before they will show up here in the drop down menu. If the vendor needed does not show up here, enter the vendor on the Facility Information screen, then return to this screen to enter the receipt.
 - iv. Enter the appropriate name/information.
 - v. In the appropriate boxes, enter the total amount of the receipt, followed by the amount spent for food purchases and the amount spent on any supplies that may be purchased with food program funds. If other non-food program items are purchased (like baby wipes), deduct those costs from the recorded amounts. Those amounts will default into the non-CACFP costs.
 - vi. Click on *Save Receipt* to the far right.
- d. After the receipt is saved, milk may be added/recorded to the receipt.
 - i. Select the *edit pencil* next to the correct receipt to bring the info into the *Enter Receipt* grid.
 - ii. To the left, notice the grid to add milk.

1. Select the *+ New Milk Entry* and add the purchased milk count by type of milk (skim, whole or alternate).
 2. Enter the total units of milk purchased, not the amount spent on milk. For example, from the Select Milk drop down menu, select Milk 1% Gallon. Then select the number of gallons purchased, and “gallon” again.
 3. Click on Insert and notice the milk purchase appear in the grid below.
- iii. Remember that the amount of reimbursement paid from your sponsor should not exceed the food program expenses. If the facility is not spending all CACFP income, begin claiming additional expenses including wages paid to cooks, teachers and/or directors for the time they allocate to CACFP duties.

8. POINT OF SERVICE FAILURE:

The color purple showing on the *Instrument Panel* on the *Facility Home* screen and/or on the *Meal Calendar* screen indicates a shortage of food in the meal service.

- a. If enough food to serve all children in attendance was not planned, the calendar date display is purple for that meal.
- b. If additional food is hand written on the printed *Meal Production Record*, (since meals must be recorded daily), corrections may be made to correct the Point of Service error.
 - i. From the menu at the top, select *Meals*, then *Create/Edit Participant Meals*.
 - ii. Select *Infant* or *Non-Infant*.
 - iii. Select the *Meal Type* from the Meal drop down menu (Breakfast, AM Snack, Lunch, PM Snack, Supper or EV Snack).
 - iv. Select the *Meal Date*.
 - v. At the bottom left, correct the *Expected Attendance* to edit the record.
- c. If additional food was not served, make no change.
 - i. CenterPilot will calculate the shortage and disallow the appropriate meal in the monthly claim.
- d. If purple is appearing often on the *Instrument Panel* and *Meal Calendar* often, it is wise to update the planned participation.
 - i. Select *Facility*, then *Facility Information*. Click on the *# Attending Meals* Tab and update the expected numbers by age group for each meal. Click on *Save # Attending Meals*.
 - ii. IMPORTANT: If a meal is edited after attendance has been taken, attendance will need to be re-saved (only one classroom or group will need to be re-saved)
 1. From the menu at the top, select *Attendance*, then *Take Meal Attendance* and save one group again.
 2. This action prompts CenterPilot to re-calculate the food against the actual attendance to confirm correct amounts.

9. SUBMITTING THE MONTHLY CLAIM:

A claim will not be available for submission until AFTER the last day of the month (to be precise, midnight CST of the last day of the month).

- a. From the menu at the top, select *Meals* and then *Meal Calendar*.

- b. Select the month and ensure that all meals and attendance have been entered in the system. There should be mostly green showing on the calendar indicating that meals were scheduled and attendance was successfully taken for the meals.
- c. The person who has been trained and designated as authorized to submit the claim will be in the drop down. If an appropriate name is not in the drop down list, contact your sponsor.
- d. Select the appropriate signer to certify the accuracy of the claim and then click on *Submit Claim*.

10.PRINTING MENUS TO POST:

To use this feature, meals must be pre-saved and scheduled using the **CenterPilot Perfect Flight Plan** summarized above. Meals entered one food at a time will not have a “name” that the system can recognize.

- a. From the menu at the top, select *Meals*, then *Meal Calendar*.
- b. Select the Month and Year and click *OK*.
- c. In the lower left section of the screen, select *Non-Infant or Infant*.
- d. Select *Weekly or Monthly*.
- e. Select a *Date*.
- f. Click on *Create Menu* at the bottom.
- g. An icon will appear above. Click on this icon and a PDF version of the menu will open.
- h. Send the PDF menu to the printer.

11.OTHER REPORTS:

CenterPilot offers many report options for participants, claims meals and facilities.

- a. **EXPORT REPORTS:** To build a report with the exact data desired, use the *Export Reports* function.
 - i. From the menu at the top, select *Export Reports*.
 - ii. Select the type of report needed
 - 1. *Participant Export Report*
 - 2. *Claim Export Report*
 - 3. *Meal Export Report*
 - 4. *Facility Export Report*
 - iii. In the Actions box in the upper left:
 - 1. Select the facility.
 - 2. Select the other desired data from the drop down menus.
 - 3. Click on *Get Report* at the top.
 - 4. The report will appear in the grid on the right.
 - 5. To view, print and/or manipulate the report, click on the *Export to Excel File* button at the top.
- b. **MONTHLY MILK REPORT:** This report assists the facility to correctly plan for and purchase the correct amount of milk.
 - i. From the menu at the top:
 - 1. Select *Meal Reports*.
 - 2. Select *Monthly Milk Report*.

3. In the upper left, select the *Month and Year*.
4. Review the data that appears on the screen.
- c. **MILK BANK:** This report calculates the daily balances of all three types of milk.
 - i. From the menu at the top:
 1. Select *Meal Reports*.
 2. Select *Milk Bank*.
 3. In the upper left, select the Month and Year.
 4. Review the data that appears on the screen.
 - a. *Planned* refers to the amount of milk needed for the number of expected participants by age.
 - b. *Served* refers to the amount of milk actually served to the number of children in attendance. This number is linked directly to the attendance function.
 - c. *Receipt* refers to the amount of milk purchased. This number is linked directly to the Enter Receipt function summarized above.
 - d. *Balance* of milk (by type) is a running calculation of the amount of milk remaining in the facility after each meal is served.
 5. Note: To create a Carry Over amount for each month (should be done after the last meal on the last day of the month):
 - a. Choose the previous month in the upper left corner.
 - b. In the Milk Served for the Period grid, click on *Process Milk*.
 - c. The milk balances from the last day of this month will transfer to the first entry in the same section of the current month.
 - d. Note that at least one receipt with milk purchases must be entered for the current month in order to carry over milk balances to the next month.

12.LIST OF ALL CENTERPILOT REPORTS:

- a. **Participant Reports:** From the main menu, click on Participants, then Reports:
 - i. Dropped and Reactivated Participants
 - ii. Participant Information
 - iii. Participant Eligibility Issues
 - iv. Participant Ethnicity and Race
 - v. Participant Household Members
 - vi. Participant's Eligibility History
- b. **Claim Reports:** From the main menu, click on Claim, then Reports:
 - i. Monthly Claim Meal Count
 - ii. Monthly Live Claim Summary
 - iii. Monthly Claim Result Summary
 - iv. Disallowance Search Report
 - v. Monthly Integrated Meal Head Count Report
 - vi. Claim Receipts:
 1. Live Claim Payment Receipts
 2. Non Live Claim Payment Receipts

- c. **Receipt Reports:** From the main menu, click on Receipt, then Reports:
 - i. Milk Reports
 - 1. Monthly Receipt Milk Report
 - 2. Monthly Milk Report Purchases
 - ii. Non-Profit Reports
 - 1. Non-Profit Live Claim Report
 - 2. Non-Profit Summary Report
- d. **Meal Reports:** From the main menu, click on Meal Reports:
 - i. Monthly Milk Report
 - ii. Milk Bank
 - iii. Monthly Food Summary (Inventory)
 - iv. Meals Taken by Participants Reports
 - 1. All Daily Meals Taken Summary
 - 2. Meals Taken by Participant Summary
 - 3. Meal Creation Record
 - v. Milk Reports:
 - vi. Scheduled Meal Milk Breakdown Report
 - 1. Scheduled Meal Milk Breakdown by Age Group Report
 - 2. Monthly Milk Bank Totals
 - vii. Meal Count Reports
 - 1. Weekly Meal Count by Name
 - 2. Monthly Meal Count by Name
 - 3. Weekly Meal Count by Classroom
 - 4. Monthly Meal Count by Classroom
 - 5. Weekly Meal Count by Age Group
 - 6. Monthly Meal Count by Age Group
 - viii. Meal Production Record
 - 1. Child/Adult Meal Production Record
 - 2. Infant Meal Production Record
 - 3. Meal Production Record by Head Count
 - ix. Whole Grain Reports
 - 1. Grains Served Across Meals Report
 - 2. Daily Meals Without Whole Grain Report
 - x. Meals Over Capacity Summary
 - xi. Training Reports: From the main menu, click on Training, then Reports:
 - 1. Training Class Report
 - xii. Export Reports: From the main menu, click on Export Reports:
 - 1. Participant Export Report
 - 2. Claim Export Report
 - 3. Meal Export Report
 - 4. Facility Export Report

13. END OF TEST FLIGHT: We hope you have enjoyed your CenterPilot test flight. If you have questions, please contact your sponsor. If your sponsor cannot answer your question, they will contact us on your behalf. With our captain operating in your facility, you can truly

FLY THOUGH YOUR PAPERWORK!!

Now, sit back, relax and enjoy the remainder of your flight!