Web-based Illinois Nutrition System (WINS)

Summer Food Service Program
Claim Instruction Manual

Illinois State Board of Education
Funding & Disbursement Services

May 2014

Introduction

Applications and claims for the Summer Food Service Program will be completed using the Web-based Illinois Nutrition System (WINS) through the ISBE Web Application System (IWAS) on the ISBE homepage starting with Fiscal Year 2014.

The most significant change between ACES and WINS is that the site claims will now include **daily meal count** detail for each approved meal service. This enables us to have much tighter edits on the meal counts to ensure the accuracy of meals claimed.

Submitting your claim is still a **two-step** process; first all site claim(s) should be submitted for the month, then the sponsor claim, which consolidates all of the site(s) claim information. The payment process does not begin until the sponsor claim has been successfully submitted.

We ask that claims be submitted by the 10th of the month following the month you are claiming. **ALL** claims, original and upward revisions, must be submitted within 60 days of the end of the claiming month in order to be paid with Federal funds. If the claim is submitted after 60 calendar days it will be received by ISBE as 'waiting for approval'. A letter will be forwarded to the Authorized Representative requesting further information if the claim is an increase.   Downward claims will be approved by ISBE without further information. [Refer to claim due dates located at http://www.isbe.net/funding/html/child_nutrition.htm] We highly encourage claim submission as soon as possible after the end of the claiming month, in case unforeseen problems arise.

If you have any questions pertaining to the information detailed in this handbook, contact:

> Illinois State Board of Education
> Funding and Disbursements Services Division
> 100 North First Street, E-320
> Springfield, Illinois 62777-0001
> **Phone: 217-782-5256**
> Fax: 217-782-3910

NOTE: ALL SCREEN SHOTS IN THIS HANDBOOK ARE INTENDED TO BE FOR EXAMPLE ONLY. ACTUAL SCREENS WILL VARY FOR EACH SPONSOR DEPENDING ON PROGRAMS APPROVED, NUMBER OF SITES, ETC.

Section I - Access to WINS

Local IWAS Administrators have been granted automatic access to the new WINS system. All other current Child Nutrition - ACES users and new users must sign up for the WINS system. To sign up for WINS:

1. Go to the ISBE homepage at www.isbe.net
2. Log into IWAS, located in the middle of the page right below the ISBE header.
3. Go to the IWAS System Listing from the blue bar on the left and click the **"Want to sign up for other systems?"** link on the bottom right hand side of the screen.
4. Then click the "sign up now" button next to "Web-based Illinois Nutrition System (WINS)".
5. After submitting the request to sign up for WINS, the local IWAS Administrator will approve or deny the request.

IWAS access questions should be directed to the ISBE Helpdesk at **(217) 558-3600**.
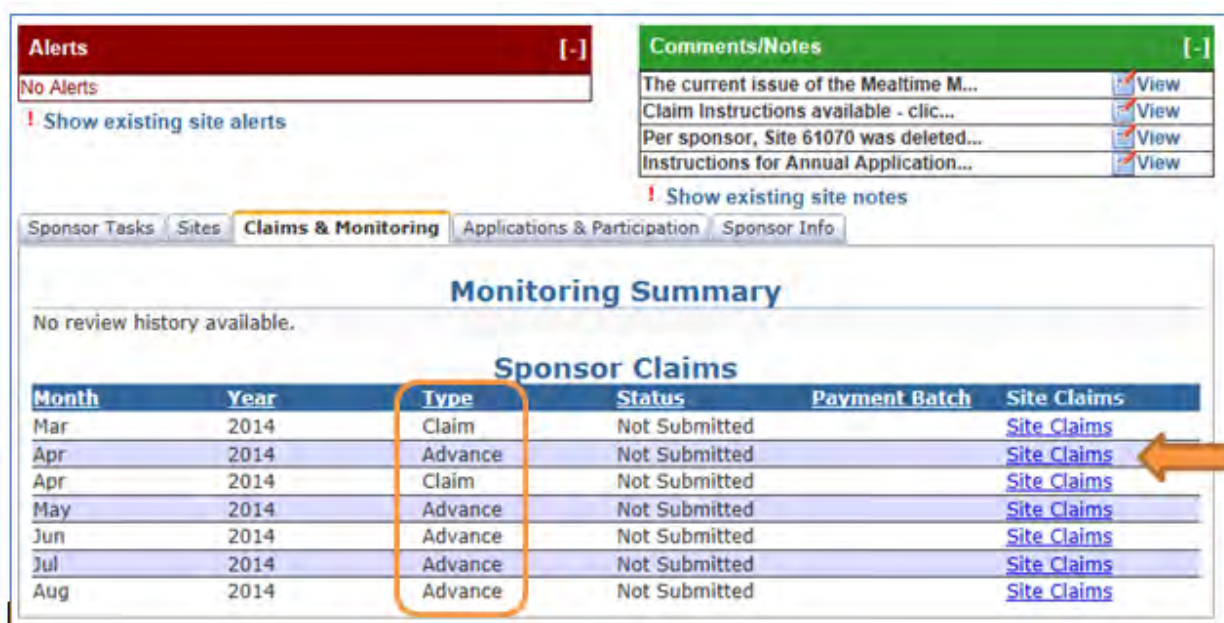
Section II – Site Advances

For <u>Advances, estimate the Daily Meal service (excluding seconds) based on anticipated participation</u>. You can only claim approved meal services for each site. If any information is incorrect, please check and update the site application. The first step in the claim submission process is to submit your site claim or advance. You can submit your site Advance by keypunching or hand entering the data for each individual site claim directly into the WINS web application. If you have many sites (10 or more), it may be more efficient and beneficial to develop an external file and upload your site Advances using a batch file (See '**SFSP Meal Count Batch File Format & Upload Instructions'** located under this icon:❓).

A. Keypunching Site Advances

There are many different ways to get to the site claim entry screens in WINS. Depending on how many sites you have operating and personal preferences, you can determine which way best meets your needs. One recommended path to the Site Claim is through the following steps:

1. From the WINS Dashboard, select the "Claims & Monitoring" tab and click on the "Site Claims" link, in blue, on the right hand side of the page that corresponds with the month for which you are submitting the Advance. There is Type column that indicates weather it is an Advance or Claim.
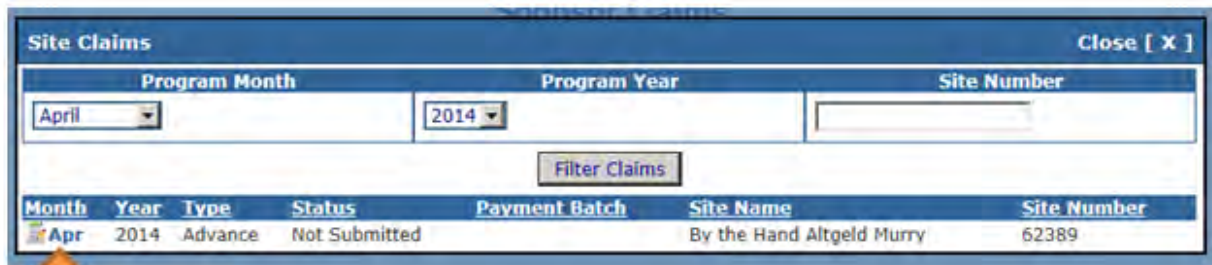
NOTE: You will only see the months that are currently available to submit. As a new month to claim begins, you will see the next month added in this grid. Advances are available to submit at any time.
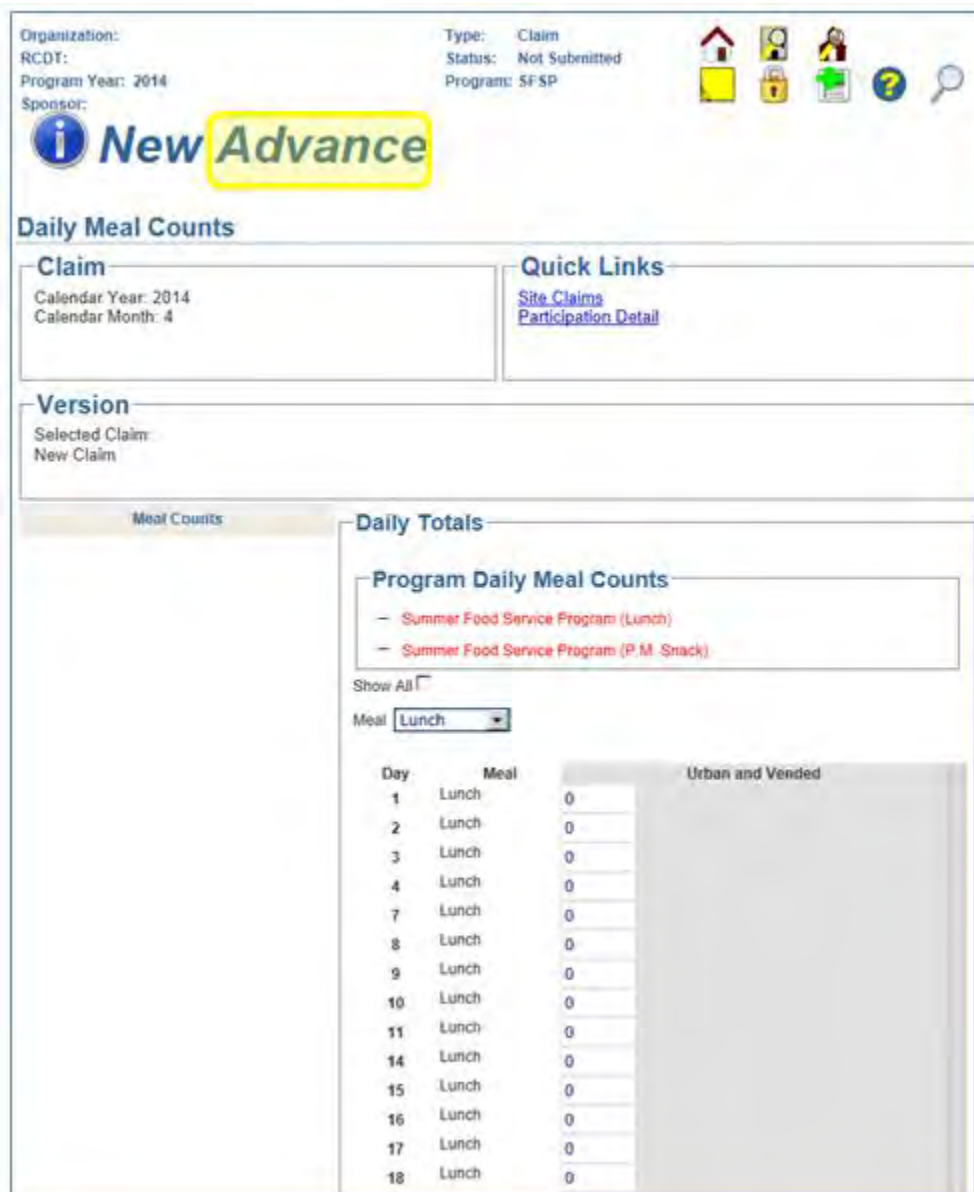
If no Month is listed, please check under the Application & Participation tab to see if the Organization is in Approved status. The site must also be in Approved Status. If you are not in Approved Status, contact Nutrition and Wellness Division at 1-800-545-7892.

2. You will then get the following grid, which lists all the sites available for advances for the month selected. This grid will show the status of each site advance. You can select which site you would like to work on by clicking on the month on the left side of the grid.

3. Once you select the site and month that you wish to submit an advance, an advance entry screen similar to the one below will be displayed.

This screen is where you will enter the ***Projected Daily Meal Counts*** for each meal service that the site is approved for. The meal services that the site is approved for will be displayed in red. After meal counts have been entered and saved, the meal service name will turn to black with a green check mark next to it.

The meal count entry screen will display each day of the month for which meal service is approved for that site. All the information displayed on this screen is based on what was approved on the Site Questionnaire for the selected site. If changes need to be made, the Site Questionnaire should first be updated accordingly and then the Site Claim can be accurately submitted. **(To update the Questionnaire, contact Nutrition and Wellness Division at 1-800-545-7892.)**

- Once you enter and save any information on the site advance the status of the site advance will change to 'Draft' and there will be a 'Draft' watermark in the background.

- Once you enter all the daily meal counts for the month, you can click the 'Save and Continue' button and it will take you to the next meal service Daily Meal Count entry screen.

- After all meal counts are entered for all meal services click 'Save and Continue.'

This screen summarizes the information you submitted on the Projected Meal Counts page. You must review the information for accuracy and ensure it matches your records. If any changes need to be made, navigate back to the Meal Count Entry screen by using the blue tabs on the left side of the screen or the 'Previous' button at the bottom of the page. If all information is correct, click on the 'Submit Claim' button.

NOTE: *You no longer have to submit the Total Projected Meals Served. This new computer system calculates this for you based on the data you submitted in the previous section. The Total Projected Meal Counts are pulled from the data you entered on the Meal Counts section. If the Total Projected Meal Counts are not correct, please check the Meal Counts tab to the left to ensure there are no data entry errors.*

The system will run edit checks to validate the accuracy of the claim. If the claim passes all the edit checks, the following screen will display. If the claim does not pass all edits and you receive Critical Errors, please correct errors and resubmit.

Note: A claim may be successfully saved with warning *messages. Warnings do not stop the payment of the advances, but are items we are bringing to your attention in case they are issues that need to be revised.*

From here you can select where you would like to go next:
- Return to the claim
- Next Site Claim
- Site Claim Summary
- Sponsor Claim Summary
- Return to the home screen (Dashboard)

If this is your last Site, Click on Sponsor Claim Summary.

NOTE: Once the site advance is successfully submitted, the status will change to 'Unconsolidated'.   It will remain in 'Unconsolidated' status until the Sponsor Claim is submitted. After submission of the Sponsor Claim, the site advance status will change to 'Consolidated'. You should complete all your site advances first and then go to the Sponsor Claim Summary screen.

Section III - Sponsor Claims

Once all Site Advances are successfully submitted, the Sponsor Claim must be submitted in order to process the advance for payment. You can access your Sponsor Claim from several areas; the easiest is from the 'Claims & Monitoring' tab on the WINS Dashboard.

After Site Advances have been entered for a month, an Alert will appear at the Top of the Dashboard reminding the Organization to submit the Sponsor Claim Summary.

Once any site advances have been successfully submitted for the month, the sponsor claim status will change from 'Not Submitted' to 'Draft'.

The 'Month' column under Sponsor Claims on the Claims & Monitoring tab will be enabled to access the Sponsor Claim Summary for the Advance.

When you click on the link to open the Sponsor claim you will see a screen similar to the following:

The Sponsor Claim is a consolidation of all the Site Claims that were successfully submitted for the month. In the Sponsor Notes area, it identifies how many Site Advances are included in this sponsor claim. <u>You must ensure that **ALL** appropriate Sites are included</u>. Please ensure that **ALL** projected meal counts totals match your records before submitting the sponsor claim.

NOTE: No data entry is done on this screen; it is for review only. If any changes need to be made, you must return to the necessary site advance to update information and then return to the sponsor claim summary and re-check the totals.

*Double-check that All Sites are included on your sponsor claim that you are wishing to submit.

Once you are sure that all totals are correct, you must click on the 'Submit' button to submit the Sponsor Claim. You will receive a screen asking you to confirm that the data you are submitting is true and accurate to the best of your knowledge. You must click on 'Agree' to complete the claim submission process.

Once the Sponsor claim is successfully submitted the screen will look like this:

You can also click on the 'Claim Rates' under Quick Links if you wish to view the reimbursement rates for the various programs.

NOTE: You will immediately see what your claim has earned. This is the new 'Claim Analysis' screen as well.

When you move back to the WINS Dashboard the claim will show as 'Approved' in the Sponsor Claim listing.

The Funding & Disbursement Division vouchers claims for payment each week on <u>Tuesday</u> mornings. If the claim was submitted prior to the start of the voucher process, it will be included in the weekly voucher batch.

Once the claim has been processed for payment, the status of the Sponsor Claim will change to 'Sent to FRIS' and will be reflected in the Sponsor Claim listing on the Claims & Monitoring tab.

Section IV – Site Claims

The first step in the claim submission process is to submit your site claim. You can submit your site claim by keypunching or hand entering the data for each individual site claim directly into the WINS web application. If you have many sites (10 or more), it may be more efficient and beneficial to develop the external file and upload your site claims using a batch file (See '**SFSP Meal Count Batch File Format & Upload Instructions'** located under this icon: ❓).

A. Keypunching Site Claims

There are many different ways to get to the site claim entry screens in WINS. Depending on how many sites you have operating and personal preferences, you can determine which way best meets your needs. One recommended path to the Site Claim is through the following steps:

1. From the WINS Dashboard, select the "Claims & Monitoring" tab and click on the "Site Claims" link, in blue, on the right hand side of the page that corresponds with the month for which you are submitting the claim. There is Type column that indicates weather it is an Advance or Claim.

NOTE: You will only see the months that are currently available to submit. As a new month begins, you will see the next month added in this grid.

If no Month is listed, please check under the Application & Participation tab to see if the Organization is in Approved status. The site must also be in Approved Status. If you are not in Approved Status, contact Nutrition and Wellness Division at 1-800-545-7892.

2. You will then get the following grid, which lists all the site claims for the month selected. This grid will show the status of each site claim. You can select which site you would like to work on by clicking on the month on the left side of the grid.

3. Once you select the site and month that you wish to submit a claim, a claim entry screen similar to the one below will be displayed.

This screen is where you will enter the ***Daily Meal Counts*** that the site is approved for. You will enter the total of meals served per day. There is also a Seconds Column where you will enter any second meals that were served by day.

The meal count entry screen will display each day of the month for which meal service is approved for that site. All the information displayed on this screen is based on what was approved on the Site Questionnaire for the selected site. If changes need to be made, the Site Questionnaire should first be updated accordingly and then the Site Claim can be accurately submitted. **(To update the Questionnaire, contact Nutrition and Wellness Division at 1-800-545-7892.)**

- Once you enter and save any information on the site claim the status of the site claim will change to 'Draft' and there will be a 'Draft' watermark in the background.

- Once you enter all the daily meal counts for the month, you can click the 'Save and Continue' button and it will take you to the next meal service Daily Meal Count entry screen.

- After all meal counts are entered for all meal services click 'Save and Continue' to proceed to the Site Claim Summary screen.

This screen summarizes the information you submitted on the Meal Counts page. You must review the information for accuracy and ensure it matches your records. If any changes need to be made, navigate back to the Meal Count Entry screen by using the blue tabs on the left side of the screen or the 'Previous' button at the bottom of the page. If all information is correct, click on the 'Submit Claim' button.

NOTE: *You no longer have to submit the Total Meals Served. This new computer system calculates this for you based on the data you submitted in the previous section. The Total Meal Counts are pulled from the data you entered on the Meal Counts section. If the Total Meal Counts are not correct, please check the Meal Counts tab to the left to ensure there are no data entry errors.*

SECOND MEALS: Always report the number of second meals actually served and the system will calculate how many you will get paid for. Second meals paid are limited to the lessor of the actual number of second meals served or 2% of the number of first meals. In this example, you would only get paid for 10 second meals. (541 x 2% = 10.82 which is truncated to 10)

The system will run edit checks to validate the accuracy of the claim. If the claim passes all the edit checks, the following screen will display. If the claim does not pass all edits and you receive Critical Errors, please correct errors and resubmit the site claim.

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Section V - Sponsor Claims

Once all Site Claims are successfully submitted, the Sponsor Claim must be submitted in order to process the claim for payment. You can access your Sponsor Claim from several areas; the easiest is from the 'Claims & Monitoring' tab on the WINS Dashboard.

After Site Claims have been entered for a month, an Alert will appear at the Top of the Dashboard reminding the Organization to submit the Sponsor Claim Summary.

Once any site claims have been successfully submitted for the month, the sponsor claim status will change from 'Not Submitted' to 'Draft'.

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When you click on the link to open the Sponsor claim you will see a screen similar to the following:
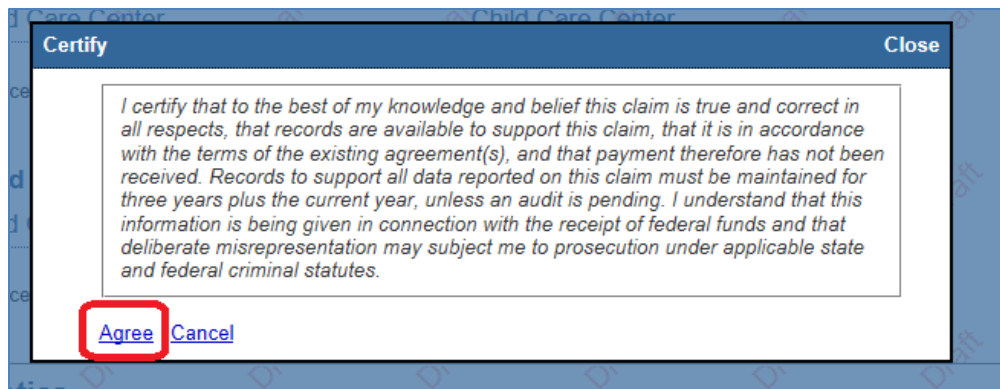

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Once the claim has been processed for payment, the status of the Sponsor Claim will change to 'Sent to FRIS' and will be reflected in the Sponsor Claim listing on the WINS Dashboard.

Appendix A

1. **Serving Days:** The highest number of days that meals were served for the month. ***Our system now calculates this number for you. There is no need to report this data in WINS.***

2. **Total Number of Meals Served:** The total number of meals served for the month you are claiming for each meal service. ***Our system now calculates this number for you from the Daily Meal Counts that were entered. There is no need to report this total in WINS.***

Icon	**Meaning**
	WINS Dashboard/Home
	Site Lookup
	Attachment
	Notes
	Help