The CACFP Information and Payment System (CIPS)

Welcome to the CACFP Information and Payment System

User Manual
Table of Contents

<table>
<thead>
<tr>
<th>Chapter/Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome to CIPS</td>
<td>4</td>
</tr>
<tr>
<td>Login through the NYSDOH Health Commerce System (HCS)</td>
<td>5</td>
</tr>
<tr>
<td>CIPS Navigation</td>
<td>8</td>
</tr>
<tr>
<td>Chapter 1- The Applications Menu</td>
<td>12</td>
</tr>
<tr>
<td>Sponsor Profile</td>
<td>12</td>
</tr>
<tr>
<td>Application Packet - Center Sponsor</td>
<td>18</td>
</tr>
<tr>
<td>Advance Request</td>
<td>25</td>
</tr>
<tr>
<td>Chapter 2- Center Applications</td>
<td>26</td>
</tr>
<tr>
<td>The Centers Application Packet- Center List</td>
<td>26</td>
</tr>
<tr>
<td>Maintaining the Center Application (View/Revise/Add Centers)</td>
<td>28</td>
</tr>
<tr>
<td>The Center Application</td>
<td>30</td>
</tr>
<tr>
<td>Closing a Center</td>
<td>37</td>
</tr>
<tr>
<td>Chapter 3- Claims</td>
<td>40</td>
</tr>
<tr>
<td>Submitting an Original Claim</td>
<td>40</td>
</tr>
<tr>
<td>Modifying an Original Claim</td>
<td>48</td>
</tr>
<tr>
<td>Creating an Adjusted Claim (Add Revision)</td>
<td>49</td>
</tr>
<tr>
<td>The Claim Summary</td>
<td>50</td>
</tr>
<tr>
<td>The Payment Summary</td>
<td>51</td>
</tr>
<tr>
<td>Chapter 4- Reviews</td>
<td>53</td>
</tr>
<tr>
<td>Respond to Review Findings</td>
<td>53</td>
</tr>
<tr>
<td>Respond to Corrective Action Plans- Not Approved</td>
<td>57</td>
</tr>
<tr>
<td>Chapter 5- Renewals</td>
<td>58</td>
</tr>
<tr>
<td>New Program Year- Enrollment and Certification Statement</td>
<td>58</td>
</tr>
<tr>
<td>Board of Directors Board Member List</td>
<td>60</td>
</tr>
<tr>
<td>CACFP Budget Plan</td>
<td>62</td>
</tr>
<tr>
<td>Security</td>
<td>66</td>
</tr>
</tbody>
</table>
Welcome To CIPS!

Congratulations! By using CACFP’s online system, hundreds of Sponsors are decreasing paperwork and turnaround time for many CACFP related tasks.

This manual has been created to help Sponsors with the functions they can expect to use while managing their CACFP needs online. Most are written step by step and include images of the actual screens that are seen when using CIPS.

Before using CIPS, please read the sections titled “Login through NYSDOH Health Commerce System (HCS)” and “CIPS Navigation”. These sections will help with accessing CIPS and avoiding common navigation mistakes.

It is important to know that CIPS stores information by CACFP Program Year, which begins on October 1 and ends on September 30. This is the Federal Fiscal Year. If a sponsor wants to see their claims from a previous fiscal year, they would need to open that year for viewing. Learn more about changing the Program Year in the section called “CIPS Navigation”.

Nutrition Pays
Login through the NYSDOH Health Commerce System (HCS)

The NYSDOH Health Commerce System (HCS) is where users login to get access to CIPS. Authorized users have gone through an application process and will have an assigned User ID and password.

**How to Login to HCS**

1. Go to the HCS Login Portal at: [https://commerce.health.state.ny.us](https://commerce.health.state.ny.us)
2. Users will enter their own HCS assigned User ID and password.
3. Click **Sign In**

![HCS Login Form]

**NOTE:** This message will appear if the wrong user ID or password is entered.

If you have trouble logging into HCS, contact the Commerce Account Management Unit (CAMU) directly at: 1-866-529-1890.
How to find CIPS:

1. Click My Content - All Applications

   This will open a list of applications beginning with the letter C.

2. Click C

   This will open a list of applications beginning with the letter C.

3. Find CACFP Information and Payment System

   Click here to add CIPS to “My Applications” for easier access.

4. Click on CACFP CIPS

   This will send users to the CIPS Welcome page.
This is the CIPS Welcome page. Sometimes CACFP will post important messages here that might require Sponsor action. Always check to see if there are any messages or notices.

5. Click **Continue** to enter CIPS.
CIPS Navigation

Once a user is in CIPS, it is important they know how to navigate, or get around, the site. Common browser buttons do not work in CIPS. When used, information may not be saved properly.

CIPS Menu Bar

The **DARK BLUE** CIPS Menu Bar is one way users can select areas in CIPS to do tasks like updating sponsor or center information, submitting claims and responding to program review findings. There are four different areas within CIPS where work can be done. These include:

- Applications
- Claims
- Reviews
- Security

Program Year

As mentioned earlier, information is stored by program year, which runs from October 1 through September 30. Always check to see what program year is open before making changes or submitting claims. The program year is found in the **GREEN** bar under the CIPS Menu bar.

![Child and Adult Care Food Program](image)
Sometimes, a user will need to make a change to an application or enter a claim that is in the previous program year. Users can change the program year by clicking on Year, which will open a list of available years. Click the year needed to see claims, applications or board list for that time frame.

**Selecting a Program Year- TIPS**

- Always check the Program Year before entering a claim/adjusted claim or making changes to a sponsor or center application.
- Change the program year when necessary. Choose the year in which the change took place. For example:
  - The **Effective Date** of a new or amended license/permit.
  - The **Expiration or Closed Date** of a license/permit to close a center.
  - The claim/adjusted claim Month.

**The “Bread Crumb” Trail, Moving Backwards and Between Tasks**

A “bread crumb” trail is available in the GREEN bar under the CIPS Menu bar. Use it to return to previous screens.

The “Back” button at the BOTTOM of the screen can also be used to move backward in CIPS.
The CIPS Menu bar can be used to move between different screens in CIPS. For example, going from a center application to a claim or corrective action plan.

**IMPORTANT:**

Do not use the internet browser back arrow. The browser arrows/buttons do not work in the CIPS Application. This can cause problems, such as information not saving properly. An error screen may appear when using the browser arrows/buttons.

**Hovering and Other Actions**

Users can hover over screen buttons to see a description of where the button will take them.

Actions in **LIGHT BLUE** lettering can be clicked to move to another screen and view, revise or modify information:
**Logging Out of CIPS and HCS**

To logout of CIPS, the user will select **Logout** in the far right corner of the **DARK BLUE CIPS** Menu bar at the very top of the screen.

**Action Buttons in CIPS**

**View**- View only, no changes are possible.

**Revise**- A new version of the Sponsor Application and Center Application will be created when a user clicks Revise. This action initiates a change.

**Modify**- Information can be changed. This option appears after a new version of an application has been started.
Chapter 1 – The Applications Menu

This chapter will focus on the Applications menu. By selecting **Applications** at the **DARK BLUE** CIPS Menu bar, a new menu will open. This is the Applications menu and includes the following items: the Sponsor Profile, Application Packet-Center Sponsor and Advance Requests.

**Reminder**
When working in CIPS, use the DARK BLUE CIPS Menu bar. Do not use the LIGHT BLUE HCS Menu.

### Child and Adult Care Food Program

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor Profile</td>
<td>CACFP Sponsor Profile Information</td>
</tr>
<tr>
<td>Application Packet - Center Sponsor</td>
<td>Center Sponsor Applications and Agreement Forms</td>
</tr>
<tr>
<td>Advance Requests</td>
<td>Request Sponsor’s CACFP Advance(s) for the current year</td>
</tr>
</tbody>
</table>

---

**Sponsor Profile**

The first item in the Applications menu is the Sponsor Profile. By clicking **Sponsor Profile**, the Sponsor Profile Menu will open. From this menu users can select the **Sponsor Profile** or **Center Manager**.

1. **Sponsor Profile**

The Sponsor Profile, seen on the next page, has two sections. They contain very general, but important information like the Federal Identification Number, the Financial Representative and Administrative Representative. Users cannot make any changes to this screen, but if something is incorrect, they should contact their Administrative Representative to fix it.
To view the Sponsor Profile:

1. From the **Applications Menu**, select **Sponsor Profile**.
2. Select **Sponsor Profile** (again) to view.
3. Select `<Back` when finished viewing.

Information below this point is used for Day Care Home Sponsors. Users may disregard this section.
2. **Center Manager (also called Sponsor Site Manager)**

The Center Manager/Sponsor Site Manager screen displays a list of every Center the Sponsor has had approved. Closed Centers and those with new, unapproved applications are also listed. Here, users can view the status of all Centers and they can begin the process of adding new Centers.

To access the Center Manager:

1. From the **Applications Menu**, select **Sponsor Profile**.
2. Select **Center Manager**.

The Sponsor Site Manager screen displays all Centers that have been active since the beginning of the program year in view.
Sorting Centers:

The columns can be sorted. Clicking on each column header allows the user to sort the data on the page.

Example (1)

Clicking on the column header labeled “Site #” will cause the page to display the Centers in either ascending or descending order depending on the user’s preference. (The first click will sort them ascending and click on the column header again and it will sort it by descending order.)

Example (2)

Clicking on the column header labeled “Site Name” will cause the page to display the Centers in alphabetical order in either ascending or descending order depending on the user’s preference. (The first click will sort them ascending and click on the column header again and it will sort it by descending order.)

Viewing Centers:

Sponsors can view the Center Profile by clicking on the Center they wish to view from the Sponsor Site Manager. Do not make any changes without talking first to your CACFP administrative representative.

Adding New Centers:

The Sponsor Site Manager is the first step for adding a new Center(s).

To add a new Center:

1. From the Applications Menu and then Sponsor Profile.
2. Select Center Manager.
3. Select Create New Site.
4. A blank Center Profile screen displays with the center number assigned.
   - Enter the Site (Center) name.
   - Select the region- call CACFP if you are unsure what region your Center is in.
   - Do not change the Center number.

   Click “Save” and “Finish” at the next prompt.
5. Select **Save** when done. Click **Finish** when prompted in the next screen, see above. The new Center will be displayed in the Sponsor Site Manager as seen below.

![Child and Adult Care Food Program](image)

### Adding Centers- TIPS

- **When to add a new Center:**
  - If the Center has never been approved to participate in CACFP.
  - If the Center has been on CACFP, but was closed.
  - If a Center currently on CACFP has moved and is operating with a new license.
- Have the license/permit(s) available.
- Each license/permit will have its own Center (site).
- Name the Center the same as it is on the license/permit, unless otherwise directed by CACFP representative.
  - If there is more than one licensed/permited program with the same name or location, consider adding to the Center name:
    - I/T for Infant and Toddler programs
    - SACC for School age programs
- The Site/Center number will automatically populate in numeric order.
- The status defaults to “**Active**”
- See Chapter 2 for instructions on adding new Centers.
**Application Packet – Center Sponsor**

The second item in the Applications menu is the Application Packet - Center Sponsor. This section of CIPS is where most of the Sponsor and Center information is maintained. This information must be updated annually to ensure it is up to date and accurate.

By clicking the Application Packet - Center Sponsor, users are prompted to select a program year as seen below. This menu is different than the one discussed in “CIPS Navigation”. Sponsors must select the program year for the application packet they wish to view or revise.

See “Selecting a Program Year- TIPS” on page 9.
Once a program year is selected, the Application Packet- Center Sponsor menu opens and users can view or revise information. The screen below is one that a new Sponsor will see. The sections (Form Name) will be described in detail, along with what actions can be performed.

TIP: Always view first! Make sure changes are necessary. Use the Bread Crumb trail or the Back button to navigate.

1- Sponsor Application

This section contains information about the Sponsoring Organization. Users can view, revise or modify many fields in this section by clicking the LIGHT BLUE action buttons along the left hand side. It is broken up into 4 continuous sections and they are described below:

Sponsor Description

General information about the Sponsorship is found here. Some fields cannot be changed here, like the FEIN, Sponsor Type and Municipality Code and not all fields pertain to every Sponsor.
Addresses

The address for the physical location (street address) of the Sponsor, the mailing address and payment address are recorded here. All fields can be revised/modified.

- **Street Address**- If the Sponsors office moves, change it here.
- **Mailing Address**- This is where all CACFP postal mailings will be sent. If using a P.O. Box, do not complete Address 2 in this section.
- **Payment Address**- This is where payment is mailed, if the Sponsor is getting a check. It is important to know that if a Sponsor must change their payment address, the Statewide Financial Service (SFS) must be notified. Otherwise, the payment will continue to be sent to the address SFS has on file.

<table>
<thead>
<tr>
<th>Addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Street Address</strong></td>
</tr>
<tr>
<td>5. Address 1:</td>
</tr>
<tr>
<td>6. Address 2:</td>
</tr>
<tr>
<td>7. City:</td>
</tr>
<tr>
<td>8. State:</td>
</tr>
<tr>
<td>9. Zip:</td>
</tr>
<tr>
<td><strong>Mailing Address</strong></td>
</tr>
<tr>
<td>10. Address 1:</td>
</tr>
<tr>
<td>11. Address 2:</td>
</tr>
<tr>
<td>12. City:</td>
</tr>
<tr>
<td>13. State:</td>
</tr>
<tr>
<td>14. Zip:</td>
</tr>
<tr>
<td><strong>Payment Address</strong></td>
</tr>
<tr>
<td>14. Address 1:</td>
</tr>
<tr>
<td>15. Address 2:</td>
</tr>
<tr>
<td>16. City:</td>
</tr>
<tr>
<td>17. State:</td>
</tr>
<tr>
<td>18. Zip:</td>
</tr>
</tbody>
</table>

Do not change the cash-in-lieu vs. commodities option on this screen. Annual mailings sent to Sponsors provide instructions on how to change the preference.

If making changes to the Payment Address always notify SFS. Failure to do so will result in checks being mailed to an old address.
**Contacts**

The contacts for the Sponsorship are located here. These are the people authorized to communicate with CACFP representatives. Turnover happens! Keep the authorized representatives updated! When staff moves on, be sure to update CIPS. There are 4 contacts that may be authorized. Here is a description of each:

- **Sponsor Administrator** - the primary contact for CACFP. All postal mailings are addressed to this person, emails are sent to this person’s email address and most phone calls are initially directed to this person. It is recommended this person have knowledge of all CACFP activities within the Sponsorship and be available to answer calls from CACFP.
- **Payment Contact** - this person will be contacted when there is an issue with claims or payment.
- **Authorized Individual 1 & 2** - additional people with knowledge of CACFP who can be of assistance when the Sponsor Administrator is not available.
- **Staff who have administrative rights in CIPS** would be helpful to have as an authorized individual.

---

### Contacts Table

<table>
<thead>
<tr>
<th>Sponsor Administrator</th>
<th>Salutation</th>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>Ms.</td>
<td>Sally</td>
<td>Jones</td>
<td><a href="mailto:sjoness@yahoo.com">sjoness@yahoo.com</a></td>
</tr>
<tr>
<td>Facility Phone:</td>
<td>(518) 555-5555</td>
<td>Ext:</td>
<td>Title:</td>
<td>Director</td>
</tr>
<tr>
<td>Cell Phone:</td>
<td>E-Mail:</td>
<td><a href="mailto:sjoness@yahoo.com">sjoness@yahoo.com</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fax:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
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### Contact Table

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Salutation</td>
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<tr>
<td>Name:</td>
</tr>
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<td>Facility Phone:</td>
</tr>
<tr>
<td>Cell Phone:</td>
</tr>
<tr>
<td>Fax:</td>
</tr>
</tbody>
</table>

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### Authorized Individual 1 Table

<table>
<thead>
<tr>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility Phone:</td>
</tr>
<tr>
<td>Cell Phone:</td>
</tr>
<tr>
<td>Fax:</td>
</tr>
</tbody>
</table>

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### Authorized Individual 2 Table

<table>
<thead>
<tr>
<th>Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility Phone:</td>
</tr>
<tr>
<td>Cell Phone:</td>
</tr>
<tr>
<td>Fax:</td>
</tr>
</tbody>
</table>

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**Emails are just as important as a telephone number. Keep all contact information up to date.**
Certification Statement

The Certification Statement must be checked only when a Sponsor first applies and for the annual renewal (see Chapter 5). By checking the statement, Sponsors confirm they are performing specific tasks required by CACFP and that they are operating in accordance with all CACFP regulations.

The Sponsor agrees to:

- Allow access to all persons without regard to color, race, sex, age, disability or national origin.
- Offer the same meals to all participants enrolled in day care, at no separate charge and without physical segregation or other discriminatory action because of color, race, sex, age, disability or national origin.
- Provide an Income Eligibility Form and Letter to Households in accordance with Federal Regulations.
- Offer access to disabled participants as needed.
- Assist participants who speak a language other than English.
- Meet special dietary requirements for disabled participants as outlined by physician’s order.
- Display the And Justice for All poster at all centers under their administration.
- Maintain CACFP records at the organization or center location for four years.
- Maintain CACFP financial records separate from other funding.

2- Financial Information

The information on this form is only seen in the program year the Sponsor originally applied. For newly approved Sponsors, this screen will be available during their 1st program year. This information is view only.

3- Non-Discrimination Policies (See 2-Financial Information)

4- Board of Directors Board Member List

The current home address and date of birth is required for the Board Chair or owner and Executive Director. Because Board Chairs often change, remember to view or revise this information annually. The owner(s) of a for-profit should choose Board Chair from the drop down list.

5- Sponsor Budget

All new CACFP Sponsoring Organizations have a budget approved during the application process. Some organizations must have a budget approved annually. The most current approved budget will be found here. The only time a budget should be revised is when CACFP sends notice to do so. This happens during the annual renewal (See Chapter 5).

6- Checklist Summary (This section currently not in use)
Revising the Application Packet - Center Sponsor

When a Sponsor revises any form or application, this will result in new status terms and the screen will look different. Below is an Application Packet that has **not** been revised.

The Application Packet below illustrates what one could expect to see when a form is revised and submitted. Notice several changes below:

- **Red arrow=** Form is not yet approved.
- **Click REVISE to make changes.**
- **Clicking REVISE will create a new version. Versions will be labeled as follows:**
  - Original- First approved form/application. Seen when a Sponsor is newly approved and when the annual renewal is approved.
  - Rev. 1, Rev. 2, etc- Each time a Sponsor clicks REVISE a new version is created.
- **This Sponsor Application has been revised 3 times, the Board of Directors is still from the original approval and the Sponsor Budget was revised once. Click the Latest Version to see the old forms.**
- **Click MODIFY to make changes after the initial revision. Modify does not create a new version.**
After clicking the Latest Version (in **LIGHT BLUE**) a list of previous versions will appear.

**Application Packet- Status TIPS**

**Not Submitted**- Submit for Approval has not been clicked

**Approved**- The latest revisions are fully approved by the State.

**Submitted**- Changes have been made, the forms are complete and the packet has been submitted for approval. The Application Packet and Center Applications are VIEW only once an application has been submitted.

**Error**- A required field was left blank. Go back into the form and make sure it is complete.

**Pending Validation**- A change was made, the application was not saved. Go back into the form, re-enter changes, click SAVE at the bottom of the screen, then click FINISH

**Return for Correction**- The State has returned a center application because the changes submitted were incomplete or incorrect. The Sponsor must modify the application and resubmit the Application Packet for approval.

**Withdrawn/Closed**- The Sponsor or State has closed the Center.
**Advance Request**

Advance Request is the last sub-menu item under Applications. Advance payments are financial assistance made available to an institution for Program costs prior to the month in which the costs will be incurred. If a particular sponsor has already been approved for an advance, it will be shown at the bottom of this screen. If the screen has the message, “There are no advances requested for this year” it means that there has not been a request for an advance. If you are interested in an advance, please contact your administrative representative (found at the Sponsor Profile) to discuss this.
Chapter 2 – Center Applications

All approved Sponsors have at least one active Center. In CIPS, each Center has its own application where all the site detail is stored. The Center applications are located in the Centers Application Packet.

How to access to the Centers Application Packet:

1. From the Applications Menu, select Application Packet- Center Sponsor.
2. Select the Program Year you wish to access.
3. From the Application Packet- Center Sponsor page, select Center Application(s)

<table>
<thead>
<tr>
<th>Action</th>
<th>Form Name</th>
<th>Latest Version</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Modify</td>
<td>Sponsor Application</td>
<td>Rev. 3</td>
</tr>
<tr>
<td>View</td>
<td>Financial Information</td>
<td></td>
<td>Approved</td>
</tr>
<tr>
<td>View</td>
<td>Non-Discrimination Policies</td>
<td></td>
<td>Approved</td>
</tr>
<tr>
<td>View</td>
<td>Board of Directors Board Member List</td>
<td>Original</td>
<td>Approved</td>
</tr>
<tr>
<td>View</td>
<td>Sponsor Budget</td>
<td>Original</td>
<td>Approved</td>
</tr>
</tbody>
</table>

Click here to access the Application Packet- Center List

This is a summary of Center Status.

The Centers Application Packet- Center List

All Centers that were active since October 1st are listed here, even if they have been closed since.

- Active Centers will have a green check ✓.
- Centers that were closed during the program year will have a red dot ●.
  - When hovering over the ●, the date the Center was closed will appear.
- Centers in the process of being revised or added will have a red arrow ↳.
Center #/Center Name

All Centers are listed in numeric order by Center number. The list can be sorted, just like in the Center Manager (see Chapter 1 for information on the Center Manager).

- Sort by clicking on the LIGHT BLUE column headings. This feature is helpful for Sponsors that have many Centers and cannot remember the Center number, but knows the Center name.

Type

The Center Type is listed as well. There are 5 different types of Centers a user may see:

- **AC** - Adult Care
- **SA** - School-age
- **HS** - Head Start
- **CC** - Child Care
- **AR** - At-risk Program
- **Shelter** - Homeless/DV Shelter

Latest Version

The Latest Version column indicates the number of revisions made to the Center application during the program year. Each time a user clicks revise, a new version is created. To view a list of previous versions, click the LIGHT BLUE version (Original, Rev. 1, Rev. 2, etc). The versions are listed with the most current at the top, and the oldest at the bottom. By viewing previous versions, users can see what information has been changed each time.
Status

The Center Status identifies if a Center is approved, somewhere in the middle of a revision or closed. See “Application Packet- Status TIPS” on page 24 for more information.

Maintaining the Center Application

There are 5 actions that can be performed in the Center application section of CIPS: view, revise, modify, add and close. Sponsors are responsible for keeping Center applications up to date.

Viewing Centers

By clicking VIEW, a user can view the Center application. No changes can be made. It is recommended that users view the Center application before clicking revise to see what needs to be updated. Clicking VIEW will open the Center application and all tabs can be reviewed.

Revising Centers

Clicking REVISE will create a new version. Click REVISE to make changes.

A Sponsor will need to revise a Center for many reasons. At the very least, the Center applications will be updated annually. Here are some common reasons for updating the Center Applications:

Annual Updates
- Participant Data (Ethnic/Racial tab)
- New Vendor Contract or when an Extension is complete

Every 2-4 Years
- License/permit/approval to operate is renewed (send a copy to CACFP)

Other Reasons
- License is amended (send to CACFP)
- Contact information changes
- Schedule changes
- To change meal approvals (send menu to CACFP if adding a meal or snack)
- To change meal preparation (contact CACFP)

If a sponsor is revising because of a move, change in tax status or affiliation, contact CACFP.
1. Click REVISE to initiate a new version.
2. Enter all required information—see “The Center Application” in this chapter.

Click MODIFY after a revision or new application has been started and additional changes are needed. Modifications are made prior to State approval. This will not create a new version.

Adding Centers

Sponsors may add a new Center at any time. New Centers include those that are newly licensed/registered or otherwise approved to provide services. A new Center can also be one that used to be on CACFP but was closed. Another reason for adding a new Center may include change in location or type of program.

Adding a Center in CIPS is a 2 step process:

1. CREATE the new Site in the Sponsor Profile-Center Manager. See Chapter 1 for instructions.
2. ADD the new Site in the Application Packet- Center List. Click ADD CENTER.

Whether adding a new Center or revising previously approved Centers, the screens will look the same. There are six tabs within each center application.
The Center Application

The detail for each Center is stored in the Center application. There are 6 tabs, only 5 of them have fields that can be edited. The first tab is the "Summary". It provides the status of each tab at a glance.

**Important to Know**

- When revising, modifying or adding a new Center the user must click through each tab. If tabs are skipped, the application will be incomplete and cannot be approved.

1. **Lic/Reg**

The Lic/Reg tab is where much of the information from a Center license/permit or other type of approval is stored. The licensed capacity, an important figure for claiming, is located here as well. The following image is what a user will see. Some additional guidance and tips have been added in blue:
Information for A1- A7 are data entered based on the license/permit/approval to operate. License exempt programs will leave A3-A6 blank. Update this section whenever a new or amended license/permit is issued. Send a copy of the approval.

A7. Age Range of Participants: From: 2 Yrs 0 Mos To: 6 Yrs 0 Mos

A8. Do you provide child care for infants under 12 months old? Yes No

A9. Enter the elementary, middle or high school a child would attend if he/she lived next door to this center:
Name: My School
Address: 50 School Rd., Albany, NY 12222

The location should match the license/permit or approval to operate.

For Centers that are owned and operated by the Sponsor, click Affiliated. If the Center being added/revised is owned by another organization or company- contact CACFP for guidance.

Click Next to move on to the next screen.
2. Contacts

The Contacts tab contains contact information on the people in charge of the Center on a daily basis. It should be revised whenever a change occurs.

3. Hours/Meals

The Hours/Meals section holds information about Center schedule, meal approvals and meal preparation. If a Sponsor uses a vendor, the most recent contract information is entered here as well. It is viewed as one continuous page, however for training purposes it is broken into sections.
Meals- The meals and snacks a Sponsor is requesting reimbursement for. The meals and snacks must be approved prior to claiming. Addition of a meal/snack or days of operation require submission of a current menu for approval.

Regular vs. Holiday, Weekend, or School Vacation Schedule- Some programs only operate one set schedule, for example traditional day care. However some, like afterschool programs can have different scheduling and meal approvals on non-school days. See below:

<table>
<thead>
<tr>
<th>Months/Days</th>
<th>must be approved for claiming.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sponsors must keep their meal schedules up to date. This is an example of an afterschool program’s Regular Schedule.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some afterschool programs are open for child care on days school is closed. This is an example of the programs schedule on non-school days. Notice the approvals and information are different.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1. A. Months of Operation (Check all that apply)</td>
</tr>
<tr>
<td>B. Days of Operation (Check all that apply)</td>
</tr>
<tr>
<td>Mon-Fri: ☑</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Regular Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>C2. Schedule the Center is open</td>
</tr>
<tr>
<td>Time Open: 3 PM :00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Meals</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Breakfast</td>
</tr>
<tr>
<td>☑ AM Snack</td>
</tr>
<tr>
<td>☑ Lunch</td>
</tr>
<tr>
<td>☑ PM Snack 65</td>
</tr>
<tr>
<td>☑ Supper</td>
</tr>
<tr>
<td>☑ Evening Snack</td>
</tr>
<tr>
<td>☑ At-Risk Snack</td>
</tr>
<tr>
<td>☑ At-Risk Supper</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th># Participants</th>
<th>Start Time</th>
<th>End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>65</td>
<td>3 PM :30</td>
<td>4 PM :00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Holiday, Weekend, or School Vacation Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>C4. Schedule the Center is open</td>
</tr>
<tr>
<td>Time Open: 5 AM :30</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Meals</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Breakfast 70</td>
</tr>
<tr>
<td>☑ AM Snack</td>
</tr>
<tr>
<td>☑ Lunch</td>
</tr>
<tr>
<td>☑ PM Snack 75</td>
</tr>
<tr>
<td>☑ Supper</td>
</tr>
<tr>
<td>☑ Evening Snack</td>
</tr>
<tr>
<td>☑ At-Risk Snack</td>
</tr>
<tr>
<td>☑ At-Risk Supper</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th># Participants</th>
<th>Start Time</th>
<th>End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>70</td>
<td>8 AM :00</td>
<td>8 AM :30</td>
</tr>
<tr>
<td>75</td>
<td>12 Noon :00</td>
<td>12 Noon :45</td>
</tr>
</tbody>
</table>
How food is prepared for each Center is documented in the Center application.

| C6. How is the food prepared? | A. Prepared at this center |
| C7. Check all meals that are purchased through a food service vendor: | B. Prepared at Organization’s central kitchen |
| | C. Purchased from a local school system |
| | D. Purchased from a food service vendor |
| C8. Do you have a food service contract? | Yes  No |
| C9. Name of Food Service Vendor: | Food Vendor |
| C10. Contract Period: | From: 01/01/2013  To: 12/31/2013 |

How is the Food Prepared? TIPS

**Prepared at this center** - Check this box if all meals/snacks are prepared in the Center’s on-site kitchen.

**Prepared at Organization’s central kitchen** - Check this box if the Center does not have an on-site kitchen, but the food is supplied by the Sponsor. Usually it is prepared at another Center that does have an on-site kitchen and is transported to at least one other Center/Site.

**Purchased from a local school system** - Check this box if the meals are purchased from a school.

**Purchased from a food service vendor** - Check this box if the meals are purchased through a private food service company such as a caterer, restaurant or other permitted establishment.

**Some Sponsors will prepare a simple snack on-site, but contract with a vendor for meals. In that case, check both- Prepared at this center AND Purchased from a school or food service vendor.**

Purchasing food from an outside vendor? Call CACFP for guidance on how to obtain a Vendor Contract.

Click Next to move on to the next screen, Previous view or edit the previous screens OR Cancel to exit the Center application.
4. Ethnic /Racial

Update this information annually. For CIPS Certified Sponsors, D4 and D5 take the place of the Participant Data Form, usually mailed to Sponsors not using CIPS in the Spring.

Click Next to move on to the next screen, Previous to view or edit the previous screens OR Cancel to exit the Center application.
5. Cert

In order to complete a Center Application, users must read and agree to the Certification Statement. Place a check mark in the Certification Statement box by clicking on the box. When finished, click on the FINISH button.

The user will be prompted to finish a 2nd time as seen below- click FINISH again.

After clicking Finish the 2nd time- users are brought back to the Summary tab and the Status will say Pending Approval. If there are Errors or other issues, the status will indicate the tab and what the error is.

Remember: Click BACK to Submit your Application for Approval.

Users must correct any errors before submitting the application.
Closing a Center

Centers are closed in the Center Application History.

To access this page:

1. From the Centers Application Packet- Center List select the LATEST VERSION (Ex: Original, Rev. 1, Rev. 2, etc) of the Center to be closed. This will open the Center Application History.

2. In the lower right corner click CLOSE CENTER.
3. Input the effective date, select SELF CANCELLED and type in the reason.
4. Click SAVE.

After clicking save, the Center Application History will display the status across the top in red.

When viewing the Application Packet-Center List, the closed Center will have the red dot, but still have an approved status. The center will only be viewable, no revisions or modifications can be made.
The Center status in the Sponsor Site Manager (found in Sponsor Profile), will default to Inactive.

Sponsors do not have to submit the application when closing a Center. This action does not require CACFP approval. However, the Sponsor may wish to speak with their Administrative Representative if there are outstanding issues that need to be addressed.
Chapter 3 – Claims

Submitting an Original Claim

All claims (first time submission and adjusted) must be postmarked within 60 days after the last day of the claim month. Keep CACFP’s 60 day calendar for easy reference to avoid missing deadlines.

When submitting claims electronically, DO NOT send CACFP a paper claim in the mail. Paper documentation used to tabulate the claim must continue to be maintained in accordance with CACFP Regulations. This documentation may include attendance records, meal count sheets and income eligibility forms.

To submit an original claim:

1. Click CLAIMS at the DARK BLUE CIPS Menu bar

2. Click CLAIM ENTRY- CENTERS from the menu list. This will open the Claim Year Summary for the current fiscal year

Program Year

The new Program Year is available on September 1st in CIPS. When submitting claims, always be sure the correct Program Year is open. See “CIPS Navigation” for more detail on the Program Year.
3. Click on the month of the claim to be entered.

4. Click **ADD ORIGINAL CLAIM**. This will open the **Claim Center List** for the selected month.

5. Click **ADD** for the Center being claimed. There may be more than one Center claimed each month. They will be added individually. Always check to verify the Center being entered is the one open on the screen.
6. Enter all required information in the fields that are open.

7. Click **SAVE** when finished **OR** if the user notices an error (like they entered the wrong month or center data) click **DELETE**.

The User ID of the person who worked on the claim appears at the bottom of the screen along with a date/time stamp. Hover over the username will reveal the persons name.
CIPS compares the claim figures against the Center approvals and performs edit checks on the data entered. The Status will display **Validated** for Center’s that pass all checks. Enter the next center if applicable.

8. When all Centers claimed have a status of validated, the user can click **CONTINUE**.

- If the claim figures do not pass, the status will show an **ERROR** and the claim cannot be submitted for payment.
This is an example of error messages that might appear when the claim cannot be validated. Click **MODIFY** and check to see if there was a data entry error. If the capacity of the Center has been amended or if the days/hours/meals served have changed, contact the Administrative Representative.

<table>
<thead>
<tr>
<th>Code</th>
<th>Error Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>323454</td>
<td>Total child care lunches is not correct. It may be that the attendance or enrollment is incorrect.</td>
</tr>
<tr>
<td>323455</td>
<td>Total Child Care Lunch cannot be greater than Total Attendance.</td>
</tr>
</tbody>
</table>

**Claim Settings**

Each Center has its own claim settings determined in the Center Application. These include the months open, days open, meals approved and the type of center it is. If data is entered that exceeds what is currently approved, an error will result.

Claim Month- Centers can only be claimed for the months in which they are approved for.

Attendance Reporting- Maximum number of days will be determined by the weekdays the Center is approved for.

Number of Enrolled Participants in each reimbursement category- Head Start Centers, At-Risk Only Centers and Emergency Shelters do not report free/reduced/paid figures. These fields will not show up.

Child Meals/ Snacks Served- These fields are made available based on the current meal approvals in the Center Application.

**At-Risk programs- most are only eligible to claim during the school year of September through June. Check with the Claim or Administrative Representative if there are any questions about how to claim school age children in July and August.**

**What happens after CONTINUE is clicked?**

The Claim Month Details screen appears with a breakdown of claim date. On this screen, users will **Certify** and **Submit** the claim.
Failure to certify and submit the claim as described can result in loss of payment! A claim is not submitted until this process is complete. It is possible to miss the submission deadline by neglecting this step!

9. Read the Certification, then check the box. If the user forgets to check the certification, an error will appear. The claim cannot be submitted until the certification is checked.

10. Click on the red “SUBMIT FOR PAYMENT” button.
Once the claim has been successfully submitted, the screen will show a confirmation which includes the following information:

- A Confirmation Number.
- Confirmation of the Month claimed.
- The total claim earning. Be aware that this does not reflect any adjustments, such as advance payments. The actual payment may be different.
- Notice of where the confirmation message is sent. This message is sent to the Sponsor Administrator and the person who submitted the claim.

11. Click **FINISHED**

The claim record will now contain much of the following detail:

- **Month/Year Claimed** - month and year of that claim.
- **Adjustment Number** - number of times the claim has been revised.
**Date Received** - date the sponsor began work on the claim.

**MIR (Merchandise/Invoice Received) Date** - date the claim is payable.

**Date Accepted** - date the claim was submitted to CACFP by the Sponsor.

**Date Processed** - date CACFP sent the claim for payment.

**Reason Code** - Indicates the type of claim. Original and adjusted are most common. May also see review or one time only.

After clicking “Finished” the Claim Month Details screen will contain an Earned Amount and Status. See below for definitions of these terms.

After the claim has been submitted for payment to the Office of the State Comptroller, the Claim Month Details will contain the **Date Processed**.
The following columns will appear:

_Earned Amount_- this is the dollar amount of the claim as submitted.

_Status_- the status of the claim

_Error_- there is a problem with the claim data. Click MODIFY, read the error messages, make corrections and follow steps 7-11.

_Pending_- you have not submitted the claim.

_Accepted_- the claim has been submitted to CACFP. Make sure the claim has a status of Accepted.

_Processed_- the claim has been submitted to Office of the State Comptroller for payment. Your organization should receive payment within two weeks.

**Modifying an Original Claim**

Before an original claim is processed, users can make changes to all fields in the Center Claim Report for any center necessary. Modifications will change the amount of the payment. There are two places to do this:

The Claim Month Details screen where you see the following options:

The Claim Month Details screen (after you click FINISH above) where you see the following options:

Modify the claim by selecting the Center requiring change. Re-enter claim information and **SAVE-CONTINUE-CCLICK THE CERTIFICATION-SUBMIT FOR PAYMENT-FINISH**
Creating an Adjusted Claim (Add Revision)

After a claim has a Date Processed, the user will not have the option to modify the claim. The user will have to revise a claim, also called creating an adjusted claim. Because the payment has already been sent, creating an adjusted claim results in the receipt of a 2nd check if adjusting upward, or the next claim payment being lowered if adjusting downward.

ALWAYS CHECK THE PROGRAM YEAR AND THE MONTH BEING SELECTED BEFORE INITIATING AN ADJUSTED CLAIM

1. Click **ADD REVISION** to initiate an adjusted claim.

After submitting the claim, **do not** click on “MODIFY” unless you intend to change the claim and resubmit it.

If you accidentally click on “MODIFY” you MUST click on Certify and Submit for Payment a second time.

If you do complete a modification, you MUST Certify and Submit for Payment a second time.
2. The Center List for that month will open. Click REVISE on the Center(s) requiring changes.

3. The Center Claim Report will open for the Center you choose to revise. Make all required changes. When making the corrections, complete all fields as they should have been originally. Do not use + or – signs in any field.

4. SAVE-CONTINUE-CLICK THE CERTIFICATION-SUBMIT FOR PAYMENT-FINISH

The Claim Summary

To view the Claim Summary screen:

1. Select Claims from the Dark Blue CIPS Menu Bar
2. Select Claim Entry- Centers
3. Select the Month you wish to view
4. Select SUMMARY on the Claim Month Details
This opens the Claim for Reimbursement Summary. This summary shows meal and reimbursement amount by Center type as submitted.

5. At the bottom of the screen, click **SHOW SITE MEAL DETAILS**. Meals claimed as shown by Center.

![Table showing warrant information](image)

You can print the claim here by clicking on the Print button on the HCS screen.

### The Payment Summary

A Payment Summary is available only after CACFP has processed a claim. The Payment Summary List displays the following items:

- **Processed Date**: Date the claim was processed by CACFP.
- **Earned Amount**: Amount of the claim as submitted.
- **Adjustments**: Any changes to the claim due to advance payments or recovery of funds.
**Distribution Amount** - Final amount to be paid to the Sponsor.

<table>
<thead>
<tr>
<th>Schedule Number</th>
<th>Processed Date</th>
<th>Warrant Issue Date</th>
<th>Earned Amount</th>
<th>Adjustments</th>
<th>Distribution Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1260232</td>
<td>09/03/2013</td>
<td></td>
<td>$ 1,068.27</td>
<td>$ 0.00</td>
<td>$ 1,068.27</td>
</tr>
<tr>
<td>1260213</td>
<td>08/05/2013</td>
<td></td>
<td>$ 995.04</td>
<td>$ 0.00</td>
<td>$ 995.04</td>
</tr>
</tbody>
</table>

Click any item in the list to see the Payment Summary. The details of each payment processed appear as seen below:

<table>
<thead>
<tr>
<th>Schedule Number</th>
<th>Schedule Process Date</th>
<th>Federal Year</th>
<th>Warrant Number</th>
<th>Paid Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1260213</td>
<td>08/05/2013</td>
<td>2012-2013</td>
<td>01651966</td>
<td></td>
</tr>
</tbody>
</table>

**Invoice #: CACFP-2021-13-07-0-C**  
**Voucher #: 355522**

<table>
<thead>
<tr>
<th>Account Description</th>
<th>Month</th>
<th>Transaction Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>CACFP Meals</td>
<td>Jul 2013</td>
<td>Original Claim</td>
<td>$ 890.88</td>
</tr>
<tr>
<td></td>
<td>Jul 2013</td>
<td>Distribution for Claim #202084</td>
<td>$ 890.88</td>
</tr>
<tr>
<td>CACFP Cash In Lieu</td>
<td>Jul 2013</td>
<td>Original Claim</td>
<td>$ 104.16</td>
</tr>
<tr>
<td></td>
<td>Jul 2013</td>
<td>Distribution for Claim #202084</td>
<td>$ 104.16</td>
</tr>
</tbody>
</table>

**Payment Schedule Summary**

<table>
<thead>
<tr>
<th>Month</th>
<th>Account Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jul 2013</td>
<td>CACFP Meals</td>
<td>$ 890.88</td>
</tr>
<tr>
<td>Jul 2013</td>
<td>CACFP Cash In Lieu</td>
<td>$ 104.16</td>
</tr>
</tbody>
</table>

**Total Payments** $ 995.04
Chapter 4- Reviews

Respond to Review Findings

Respond to administrative reviews in the REVIEWS section of CIPS.

1. Click REVIEWS in the CIPS Menu Bar.

2. Click TRACKING in light blue.

3. Enter the Sponsor agreement number. Then click SEARCH.
4. Click on the **OPEN** review.

5. The findings and recommendations are listed for the current review. Click **VIEW** to see detail for all Closed findings or recommendations, click **EDIT** to enter the corrective action plan.

6. When Edit is clicked, the user can see all detail of the finding, the required action and the due date. Special instructions will list supporting documents or other materials the reviewer has required to support the corrective action plan. Click **SUBMIT FOR APPROVAL** when the response is complete.
   - The user may also **SAVE** if the response is incomplete or click **BACK** to return to the listing of findings/recommendations if no response is typed.
Finding: Income eligibility applications are not kept confidential. [Regulation 226.23 (e) (1)]

Finding Cited:

Required Corrective Action: Describe how income applications will be kept confidential and access to the forms will be limited to those who categorize them and prepare or submit the monthly claim for reimbursement.

Sponsor Corrective Action Plan: Type in this box.

Special Instructions:

Finding Tracking

1. Current Status: Open
2. Severity: Action Required
3. Due Date: 8/15/2101
4. CACFP Response:

Dates

Created 08/15/2013 by JLG11
Submitted for Acceptance
Accepted

Save Submit For Acceptance Back

SUBMIT FOR ACCEPTANCE when the response is complete.

7. Click FINISH when prompted to return to the list of findings/recommendations.
CACFP staff will evaluate the response and supporting documentation, if required, and either approve or not approve. Responses that have been approved will have a status of “Closed”; those that were not approved will have a status of “Not Approved”.

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Findings/Recommendations</th>
<th>Severity</th>
<th>Status</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. View</td>
<td>A Participant Data Form was not on file for each center; however it was completed on the day of the review.</td>
<td>No Action Required</td>
<td>Closed</td>
<td>08/15/2101</td>
</tr>
<tr>
<td>2. View</td>
<td>Finding: The income eligibility applications did not support the number of participants reported in the free, reduced and paid categories on the claim. [Regulation 226.23 (e) (4)]</td>
<td>Action Required</td>
<td>Submitted</td>
<td>08/15/2101</td>
</tr>
<tr>
<td>3. View Edit</td>
<td>Finding: Vendor contracts are not on file for all vended meals. [Regulation 226.22 and FNS 796-2, Exhibit B (D-1a)]</td>
<td>Action Required</td>
<td>Not Approved</td>
<td>09/15/2101</td>
</tr>
</tbody>
</table>

When the corrective action plan has been submitted, the status changes to submitted.

Respond to all Not Approved findings.
Respond to Corrective Actions Plans- Not Approved

If a corrective action plan is not approved, a new Due Date will be assigned and the user will follow steps to edit their previous response. The CACFP response will be available at this time. Users will delete their old plan and type in a new one. Then submit for approval again.
Chapter 5- Renewals

Each year, Sponsoring organizations in the Child and Adult Care Food Program are required to renew their agreement with CACFP. By renewing, Sponsors can continue to submit claims and receive reimbursement. Claims, beginning with October of the new program year, cannot be paid until CACFP receives and approves all renewal documentation.

Sponsors whose renewal is not approved by November 30, are not eligible for October reimbursement.

**New Program Year- Enrollment and Certification Statement**

Every Sponsoring organization must enroll for the new Program Year by September 30th. When the new Program Year is available, users will see it when they open the Applications Menu. Enrollment begins when the user clicks the new program year. See below:

By clicking the new program year, users will be prompted to enroll. Click **ENROLL**. Then **OK** to continue.
The Application Packet- Center Sponsor will then open. Notice the Sponsor Application requires validation. Click MODIFY.

Once the Sponsor Application for the new fiscal year opens, users should verify all information is correct and up to date. Pay close attention to the contact information- add new staff, delete staff no longer employed or if responsibilities have changed. The user should read the Certification Statement in full, put a check mark in the box, then click SAVE. Users will then be prompted to click FINISH. If the box is not checked, an error message will appear. The application cannot be submitted or approved until the box is checked.

All CACFP Sponsorships must renew their participation annually. Instructions are emailed to the Sponsor Administrator. This person is listed in the Contacts section of the Sponsor Application. Always keep the contact information updated.
Board of Directors Board Member List

All Sponsors must review the Board of Directors Board Member List for accuracy when renewing.

Sponsors can view, modify, add and delete board members. Always begin by viewing the information to determine if changes are needed.

1. From the Application Packet- Center Sponsor screen, click VIEW to see the Member List.

<table>
<thead>
<tr>
<th>Action</th>
<th>Form Name</th>
<th>Latest Version</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Revise</td>
<td>Sponsor Application</td>
<td>Original</td>
</tr>
<tr>
<td>View</td>
<td>Financial Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Non-Discrimination Policies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Revise</td>
<td>Board of Directors Board Member List</td>
<td>Original</td>
</tr>
</tbody>
</table>

2. Click VIEW on the individual to open details of the board member.

3. If changes are required, click BACK to see the Application Packet.

4. Click REVISE. The Member List will open, it will look similar to when clicking view, but now the option to modify and add a member will be available.

5. Clicking MODIFY - the details of the member will open and all fields can be edited.

Make changes if a member’s information has changed, then click SAVE.
Clicking **ADD MEMBER** will open a blank page for board member information. Owners of for profit organizations should be listed as the Chairman of the Board. Complete all fields seen below and save.

If a person is no longer a board member, executive director or owner they can be deleted by:

- Clicking **MODIFY** then next to their name.
- Then click **DELETE** in the lower right hand corner.

Clicking **DELETE** will prompt the user with a warning that pressing delete cannot be un-done.
CACFP Budget Plan

Some Sponsoring Organizations are required to submit an annual CACFP Budget Plan for the program renewal. Sponsors are notified if the budget is needed. **Do not make changes to the budget unless specifically advised to do so.**

An email is sent to the Sponsor Administrator advising that a budget is required for the Program Renewal. Instructions and forms will be attached to the email. It is recommended that the person who receives this information save the files on their own computer because they will need to edit the files and upload them into CIPS.

When the user opens the new Program Year, the Sponsor Application and Sponsor Budget will have a red arrow ➡ indicating those forms must be completed. Follow the instructions in Chapter 1 to complete the Sponsor Application.

To access the Sponsor Budget:

From the Application Packet-Center Sponsor, locate the Sponsor Budget- click **ADD**.

The budget will open and be blank. Users can look at the budget from last year by changing the Program Year and viewing the Sponsor Budget.

---

**Completing a Sponsor Budget for Program Renewal**

When the Sponsor has determined the estimated reimbursement and annual budget, the information is entered into the CIPS Sponsor Budget.

If CACFP funding is requested for labor, capital outlay, audit fees, contract services or other administrative costs, a spreadsheet and supporting documentation will be required. The spreadsheet and other necessary forms are emailed to the Sponsor Administrator.

The budget entered into CIPS should be exactly the same as the worksheet attachment.

Upload the budget worksheet and any additional documents required for review and approval of the budget.

**Why Add an Attachment?**

If funding is requested to be used for labor costs, capital outlay, audit fees, contract services or other administrative costs, the Centers Budget Excel spreadsheet must be attached to detail the costs and request special approvals for specific items.
How to Upload/Attach Files in the Sponsor Budget

Steps 1-7

Before adding an attachment, CLOSE THE FILE ON YOUR DESKTOP. Attempting to upload or attach an open file will result in an error and the file will not attach.

Sponsors will enter their budget figures in this column.
3. Search for and Select File

4. Click Open

5. Enter File Note to identify the attachment. A file note is required in order to save.

6. Click Upload and Save

7. Click Finish
When the file has been uploaded click **SAVE**.

**View File** will open the attachment.

**Modify** will allow the File Note to be edited, not the attachment.

See who uploaded the file and the date it was done here.

Always remember to click **SUBMIT FOR APPROVAL**. CACFP cannot approve any changes until the packet is submitted.
Security

All Sponsors must regularly review and update the Security User's Profile for all staff with access to CIPS. Refer to Chapter 6 for details on how to access the list of users and add, delete or modify the profile and individual security rights. Also consider requesting HCS accounts for all staff listed as a Sponsor Contact in the Sponsor Application section.
Chapter 6- CIPS Security

Security Starts with You

New York State takes the security of information seriously. Sharing account information can put your organization at risk. At a minimum HCS can suspend or disable an account. Because claim settings are changed online, sharing accounts could affect the ability to claim and the amount of reimbursement received. Follow these guidelines to make sure CACFP tasks and claims can be performed regardless of turnover:

- Arrange to have more than one person obtain an HCS Account and access to CIPS.
- Replace the HCS Director/HCS Coordinator before exiting the organization.
- Immediately inactivate employee accounts when they leave their job or duties change.
- Immediately add users when new staff are hired or duties change.
- Update security rights as needed, at any time.

Never share a personal user id or password with anyone!!

Adding a Staff Person to CIPS

Adding CIPS Certified staff is a two-step process:

Step 1- Request HCS account

1. Login to HCS
2. Select My Content- All Applications
3. Browse by the letter “C”
4. Scroll down and select “Coord Account Tools – HCS Coordinator”
5. Scroll down to Account Requests

A. PAPERLESS OPTION FOR USERS WITH A NYS DMV LICENSE OR NON-DRIVER PHOTO ID:

Choose this if the user has a NYS DMV Driver License or NYS DMV non-driver photo ID. Click on the link shown on the screen to register for a “user” account.
B. FOR USERS WITHOUT NYS DMV ID:

- Click to view and print the User Security and Use Policy for the type of account you are requesting. Give this to the staff person who will have the account to read and keep.

- If necessary, click to see the instructions for how to complete the on line request.

- Click on the account type you want to request. Follow the prompts.

The HCS website offers a variety of ways to receive assistance with the process of adding users. Be sure to take advantage of them as needed:

- Follow the prompts on all screens.
- Refer to the FAQ’s- Frequently Asked Questions.
- Call HCS at the numbers provide on screen.
- Email HCS at the email address provided on screen.
- Refer to the Help menu.
**Types of HCS Accounts- Which one should I choose for staff?**

**Director**- The HCS Director is the person who binds the organization to NYSDOH. HCS recommends a CEO or CFO. They will have coordinator and user rights.

**Coordinator**- The HCS Coordinator maintains the organization’s user accounts and contact information. They are responsible for requesting new accounts and informing NYSDOH when users leave the organization. There may be more than one HCS Coordinator per Sponsorship. CACFP recommends that at least one of them be the organizations Sponsor Administrator.

**User**- Users cannot request new accounts, but can perform all tasks that the HCS Coordinator(s) assign them under security rights.

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**Step 2- Create the User Profile in CIPS**

After the HCS Account Has Been Activated – the new User will be added to CIPS.

1. In the CIPS Dark Blue Menu Bar, click **SECURITY**

2. Then click **USER MANAGER**

3. Click **ALL** to view the list of current users. The list of current user accounts, both active and inactive, are shown here. Verify the employee is not already listed.

4. If the employee is not on the list, click **ADD NEW USER**. This will open the User Profile where information about
the new user is entered.

5. Complete all the fields as follows:

![User Profile screenshot]

6. Assign security rights in the **Security Base** section.

**Administrative Rights** - If the employee is to function as an administrator with the ability to add additional users, click “Yes” for the first question. If not, click “No.”

**Security Groups** - should be selected based on the permissions the employee will need to perform their assigned tasks in CIPS. These permissions are as follows:

- All User Information must match the HCS Account Request
- The User AND Single SignON Name will be the User Id provided by HCS—see the activation letter.
- Enter password1 for the password. This password will NEVER BE USED.
• Sponsor Center App L1 – This security access has the ability to revise/modify the Sponsor and Center applications and submit the changes for State approval. This security group can be combined with another group(s).

• Sponsor Center Claim L1 – This security access has the ability to revise/modify the monthly claim and submit the claim to the State for payment. This security group can be combined with another group(s).

• Sponsor Admin Center – This security access has the greatest security access available. It includes the same permissions as the two groups listed above plus the security screen permissions to add new users.

Additional guidance for the HCS Coordinator responsible for adding new users:

• If you want a staff person to be able to modify the applications and be able to submit the monthly claims but NOT be able to have access to security, then select Sponsor Center App L1 and Sponsor Center Claim L1 and no other check boxes.

• If you want a staff person to only work on claims, then select Sponsor Center Claim L1 and no other check boxes.

• If you want a staff person to only work on application data updates such as maintaining center applications, then select Sponsor Center App L1 and no other check boxes.

The last selection in the Security Base section is the “Associated to Sponsor(s):” field. CIPS will default to your sponsorship’s name.

7. The “Status” field at the bottom of the page should default to “Active” for a new user account. If not, select “Active” when adding a new user.

8. Click SAVE

**Changing Security Permissions for Staff**

A user with administrative rights can customize other users’ rights of the security groups.

1. In the CIPS Dark Blue Menu Bar, click SECURITY

2. Then click USER MANAGER

3. Click ALL to view the list of current users.
• It is possible to search for individuals by entering their name in the search box and clicking SEARCH.

4. Click on the users name to open the User Options menu.

5. Click USER’S SECURITY RIGHTS.

Change the users rights by clicking ALLOW or DENY for individual actions that can be performed.
6. Assign individual rights by clicking **ALLOW** or **DENY**.

7. Click **SAVE** at the bottom of the screen. The changes will not be retained if this step is skipped.

8. Log Out for changes to take effect.

**Inactivating Staff**

*When a staff person leaves employment it is very important that their User Profile be switched to Inactive in CIPS.*

1. In the CIPS Dark Blue Menu Bar, click **SECURITY**

2. Then click **USER MANAGER**

3. Click **ALL** to view the list of current users.
   - It is possible to search for individuals by entering their name in the search box and clicking **SEARCH**.

4. Select the employee’s name
5. Click **USER’S PROFILE**

![User Profile Form]

- **User Information**
  - First Name: Mary
  - Last Name: Poppins
  - Email Address: mpoppins@yahoo.com
  - Phone Number: (555-555-5555)

- **Login Information**
  - User Name: mpoppins
  - Password: ****
  - Confirm Password: ****
  - Require password change next login: No
  - Single SignOn Name: mpoppins

- **Security Base**
  - User is an Administrator: No
  - Security Group(s):
    - Sponsor Center App L1
    - Sponsor Center Claim L1
    - Sponsor Review L1
    - Sponsor Admin Center
    - Learning CIPS, Inc.
  - Associated to Sponsor(s):

- **Status**
  - User Status: Active

6. Change User Status to **INACTIVE**

7. Click **SAVE**

8. **Alert HCS- call CAMU at 1-866-529-1890 to cancel the inactivated employee’s account**

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Keep the User Profile up to date. Update the information as needed and it is recommended that Coordinators review all staff profiles annually. Follow steps 1-5, make changes and Save.

Click the arrow for a drop down menu and select **INACTIVE**.

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## When to Ask for Help....Troubleshooting Guide
### continued

<table>
<thead>
<tr>
<th>Question from caller:</th>
<th>Possible Resolution:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Having trouble activating HCS account; HCS log in not working; HCS password not correct</td>
<td>Call HCS Commerce Account Management Unit (CAMU) Help Desk at 1-866-529-1890.</td>
</tr>
<tr>
<td>Payment has not been received</td>
<td>It takes up to 2 weeks to receive payment once the claim is submitted. Payment is not received after 2 weeks, please contact the Financial Representative at CACFP.</td>
</tr>
<tr>
<td>Check the status of the claim:</td>
<td></td>
</tr>
<tr>
<td>• “Processed” – means payment is within 2 weeks.</td>
<td></td>
</tr>
<tr>
<td>• “Accepted” - means the claim has been submitted.</td>
<td></td>
</tr>
<tr>
<td>• “Pending” - means you have not submitted the claim.</td>
<td></td>
</tr>
<tr>
<td>• “Error” - means there is a problem with the claim data.</td>
<td></td>
</tr>
<tr>
<td>How to print a claim?</td>
<td>After clicking “Submit for Payment,” “Summary” will appear in the Action column on the left at the Claim Month Detail screen for the claim month. Open the Summary (not payment summary.) Use the print icon on the HCS screen. Use the “Show Center Site Details” at the bottom of the screen to show data for each center.</td>
</tr>
<tr>
<td>Claim says: &quot;Pending&quot;</td>
<td>Is there a red “Submit for Payment” button on the screen? If so, click it when the claim is complete. Once the status has changed to PROCESSED the claim check is usually mailed within 2 weeks.</td>
</tr>
<tr>
<td>One of the Centers is not eligible (and it should be).</td>
<td>Speak to the Nutritionist or Financial Representative.</td>
</tr>
<tr>
<td>Unable to enter all the meals/snacks.</td>
<td>Speak to the Nutritionist or Financial Representative.</td>
</tr>
<tr>
<td>Unable to access CIPS or the screen is frozen, or other web connectivity issues.</td>
<td>Please call our CACFP Help Desk for technical assistance. Call 1-800-942-3858. Please press “1” to be connected to a Help Desk agent.</td>
</tr>
<tr>
<td><strong>On screen errors</strong></td>
<td>The system will indicate whatever is needed to complete. Follow the prompt message and supply whatever information is requested. If there are questions, contact the Nutritionist or Financial Representative.</td>
</tr>
<tr>
<td>----------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Adding a new user;**  
**Inactivating a new user;**  
**Replacing the HCS Director;**  
**Replacing the HCS Coordinator** | See Chapter 6- CIPS Security. |
| **Changing security for a user** | See Chapter 6- CIPS Security |
| **How to revise information on the Sponsor or Center application?** | For the Sponsor Application and Center Application click “Revise”. Once revisions are complete click “FINISH”, and then click “SUBMIT FOR APPROVAL”. Speak to the Nutritionist there are questions. |
| **RENEWAL Questions** | Speak to the Financial Representative or Nutritionist. |