



# Qmlativ Food Service Overview with Migration Cleanup Opportunities

Student Software Support Analysts

School Year 2025-2026

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# Security

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Frequently asked questions:

*“Why do I not have the same option or see the same information?”*

Great question!

- Your access in the Qmlativ Software is based upon securities levels that have been dictated by your administration.

If you feel that you need extra security to better do your job, please contact your district Security Administrator with your request.



# Course Outlines and Prerequisites:

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## PDC Required Prerequisite:

- Food Service Setup and Processes Quick Start Course- WA- 1.5 hours
- Food Service Point of Sale Quick Start Course-1 hours
- Food Service Mastery Course - WA - 4.3 hours (optional)
- Fundamentals of Student Management Setup & Processes Quick Start Course-WA- 2 hours
- General Navigation Student Records Quick Start- .5 hours

\*\*If you do not have a PDC Account or the above listed courses, please reach out to your security admin.\*\*

## Course Outline:

1. General Home Screen Navigation
2. Review of Food Service Module Features
3. Entering Food Service Applications
4. Import Direct Certification
5. Food Service Letter and Templates
6. Overview of Customer/Payor Profiles
7. Entering Purchases and Payments
8. Overview of Food Service Lines and Item List
9. Running Point of Sale
10. Monthly Reimbursement Claims and other Helpful Reports
11. Creating Live Tiles and Charts

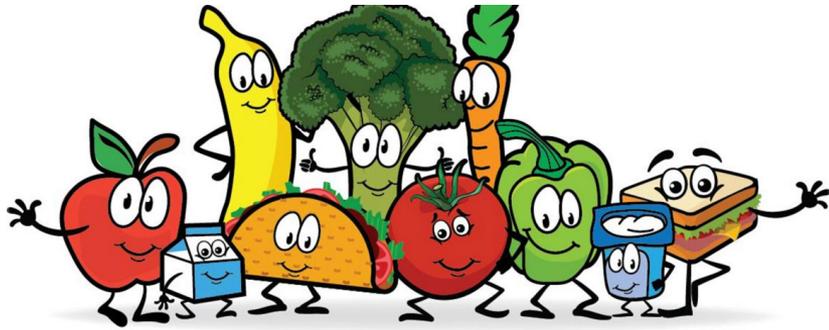
## If Time allows:

1. Migration Cleanup Tasks

## Duration/Recommended Needs:

3 hours/Training Database (TLA)





Let's jump right in...

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# Migration Cleanup Opportunities

# Lunch Codes (SPr11) DT

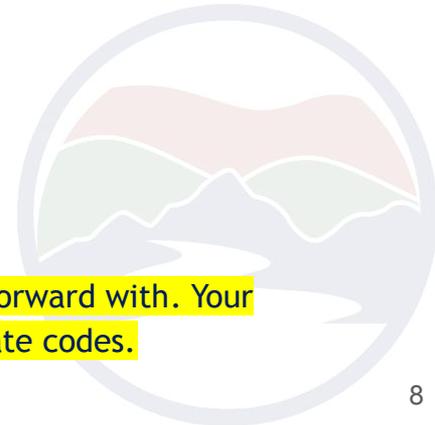
This task applies to both Food Service and Non-Food Service Districts. Duplicate Lunch Codes with the same Type should be merged prior to starting the migration process for accurate eligibility activity.

To review Lunch Codes:

- Go to one of the following areas:
  - Food Service Districts - **Student Management\Food Service\FS Setup\CO\LC**
  - Non-Food Service Districts - **Student Management\Students\ST Setup\CO\LC**
- Look for records with duplicate Types.

Code ▲	Short Description	Long Description	Type	Use PC	WE Disp	Subsidized Account
0	Inact reduced l	Inact reduced lunch	Other	N		
A	Adult	Adult	Adult	N	A	
D	Denied free/red	Denied free/reduced	Other	N		
F	Free	Free	Free	Y	3	
I	Inactive free l	Inactive free lunch	Other	N		
P	Full price	Full price	Paid	Y	1	
R	Reduced	Reduced	Reduced	Y	2	

If duplicates exist, please let your migration analyst know which codes you wish to move forward with. Your migration analyst will then escalate a request to WISPC to merge those identified/duplicate codes.



# Item Master (SPr13)

In Qmlativ, only items that are flagged as Government Funded appear on the Monthly Reimbursement Claim. To expedite Qmlativ setup, any items a district wishes to see on the Monthly Reimbursement claim should be updated to Government Funded Yes, in the SMS 2.0 database prior to migration to Qmlativ.

**Note- Flagging items as Government Funded does not impact processes or reporting out of SMS 2.0.**

**Note- Ala Carte items do not have to be marked as Government Funded in order for them to be displayed on the Monthly Reimbursable Claims. Once in Qmlativ if the Item Type of A LA Carte has a Reimbursable Meal Type Code of O – Other, the Ala Carte Items will display on the Claim under the Other Revenue section.**

To review the Item Master navigate to Go to **Student Management/Food Service/PU/IM**

- Review items list to ensure all proper items are marked as Government Funded.
- Highlight and then Edit Items that should be marked as Government Funded.
- Within that Item, select the Government Funded checkbox and click Save.
- Expand the same Item and edit the Items Detail record and check the Government Funded option and click Save.
- Repeat this task for each item in the browse with a Government Funded value of NO.

The left screenshot shows the 'Item Master Maintenance' form. The 'Item' field is set to 'B' and the 'Long Description' is 'BREAKFAST'. The 'Item Type' is 'breakfast'. The 'Government Funded' checkbox is checked, and the 'Use Lunch Code' checkbox is also checked. The 'Save' button is visible.

The middle screenshot shows the 'Item Master' application with a table of item details. The table has columns for 'Item', 'Short Description', 'Long Description', 'Type', 'Gov't Fund', and 'Lu'. The first row is highlighted in red. Below the table, there is a table of 'Item Detail' records with columns for 'Lunch Code', 'Price Category', 'Gov't Funded?', 'Limit', and 'Price Effective'. The 'Gov't Funded?' column is highlighted in red, and the 'NO' value in the first row is also highlighted in red.

The right screenshot shows the 'Item Detail Maintenance' form. The 'Item' field is set to 'B' and the 'Long Description' is 'BREAKFAST'. The 'Lunch Code' is '4' and the 'Price Category' is 'EL'. The 'Government Funded' checkbox is checked. The 'Save' button is visible.

# Sync Payor Status Audit DT

This is run at the **District** Level- When a student is both a Payor and Customer, and is withdrawn from the district, the Customer Record becomes Inactive but the Payor Record may remain Active. This audit program will update the Food Service Payor status to match the current year status of the student(s) attached as customers. The option to sync Staff status will check to see if the staff is active in any entity and set the Payor record to Inactive if there are none.

**\*\*This utility should only be run if your Students are marked as their own payor. Review the Food Service Configuration under Food Service/Foodservice Setup/Configuration/Food Service Configurations to see if Create Student/Customer as Own Payor is selected. \*\***

1. Go to Student Management/Food Service/Payors/Setup/Utilities/Audit Utility/Sync Payor Status Audit
2. Add a New Template
3. Save and Process
  - a. This is a two step utility so be sure to preview the records, click save, then Run the Update.



The screenshot shows the 'Sync Payor Status Audit' utility interface. It includes a title bar with icons for help, search, and refresh. Below the title bar is a descriptive paragraph: 'This audit program will update the Food Service Payor status to match the current year status of the student(s) attached as customers. The option to sync Staff status will check to see if the staff is active in any entity and set the Payor record to Inactive if there are none.' To the right of this text are buttons for 'Save', 'Save and Process', and 'Back'. The 'Template Settings' section contains a required field for 'Template Description' with the value 'Migration Clean up' and an unchecked checkbox for 'Share with other users in entity 401'. The 'Utility Ranges' section has 'Low' and 'High' labels above input fields for 'Payor Key', with the 'High' field containing 'ZZZZZZZZZZ'. A checked checkbox for 'Process Staff Payor Records' is also present. An asterisk (\*) denotes a required field.



**Contact your GCR Team:**  
**[student@gcrisc.org](mailto:student@gcrisc.org)**