



Qmlativ Student Food Service Back-to-School 2026-2027

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Before we begin...

Keep in mind that the ability to use various functions is security driven. You may need additional access to utilize these tools. In addition, your district's FS Configuration at the District and Entity levels will impact the options available to you.

This document lists steps that should be taken prior to year start, Direct Certification, Monthly Claim Reports, and Verification. We will focus on items listed under Features and Settings in the FS Module.

Steps to be completed prior to processing your first DC Import or inputting any Applications for the current school year.

- Review FS Settings at the District and Entity Levels
 - Review Online Application Configuration
 - CEP Schools Configuration Setup
- Mass Update Customer Price Categories
- Review Income Guidelines Table – Confirm Current Year
- *Consent to Share Program
 - Note: Review codes and date ranges if tracking in Qmlativ
- Review FS Letters – Set up Scheduled Task Runs

Steps to be completed prior to the first day of school.

- Item Master – Update prices as needed
- Line Configuration – Review settings
- *Online Forms – If used – Review/update
Examples: Lunch Surveys/Reports
- *Message Center – Review Notifications Settings
Examples: New students, low balance, etc.

**Due to time limitations, we will not be covering Online Forms, Message Center, or Consent to Share updates but if your district uses these features you will want to review your settings prior to the first day of school.*

Review Settings at District and Entity Levels

Settings clone from year to year – review if changes need to be made.

• District Level

- **Food Service – Codes**
 - Income Eligibility Guidelines
 - Confirm Current Year Guidelines are available.
- **District Configuration- Settings**
 - General Tab – Review customer PIN settings and DC Import Effective Date Configuration.
 - Online Application Tab
 - **NEW**- Configuration Standard or Non-Pricing Household Letters.
- **District Year Configuration: Settings**
 - Review Eligibility Category Defaults
 - Allow Online Application Entry
 - Count by Default Entity

Note: As of April 4, 2025 the CNEEB application has been configured to recognize CEP Schools. Please review your School Details to ensure schools are set up correctly.

To do so **Navigate to Admin Access /Enrollment/Features/School** and ensure all CEP Schools in your district are marked **“Participates in Community Eligibility Provision (CEP)”**.

• Entity Level

- **Entity Configuration- Settings**
 - Exclude from Direct Cert Option
 - Homeroom Purchase Configuration
 - Service Type Line Details – may be beneficial for larger districts, but not a necessary configuration.
- **Entity Group Year Configuration- Settings**
 - General – Customer Creation Defaults
 - Category Default – Default Grade/Price Category Settings
 - Pin Default – Staff PIN Setting

Mass Change Customer Price Categories

This can be done at the District or Entity level and **prior** to your first DC import.

- Navigate to the **Food Service/Utilities/Mass Change Customer Price Category**.
 - **Best Practice:** Include **both** Active and Inactive Customers when processing.
- Select the **“Grade Level”** that rolled to a new Price Category.
- Check to **“Include staff”**, if necessary.
- Select **“Old Price Category”**.
 - Selecting this will grab all students that were assigned to the prior year Category with the grade range and Status selected above.
- Select the **“New Price Category”** students will be moving to in the new school year.
- Enter and “New Effective Date”.
 - **Best Practices:** Select an effective date that falls **BEFORE** your first DC Import/Application entry for the current school year. **Note:** This utility should be run prior to your DC import. Be consistent in your date selection. **Example dates:** 8/01/XX effective date each year for this utility; then process your DC 8/10/XX each year.

Mass Change Customer Price Category

Enter Price Category Details



→ Next Cancel

Entity
402 - City High School

PRICE CATEGORY DETAILS

Customer Status

*Grad Year/Grade

Include Staff ☐

Old Price Category

New Price Category

*New Effective Date

Note: This Utility can run for multiple entities, but only one grade level at a time.

Direct Certification

Direct Certification information can be entered via a Direct Certification Import or manually entered via Customer Details.

- **Direct Certification Import:**

- Direct Certification – Food Service/Features
- Select Import Direct Certification (Upper Right)
- Configure Import based on District Policy

NOTE: *To use the Import Eligibility Date as the Effective Date option, the box must be checked in the Food Service District Configuration Settings.*

Recommended: Run the WA Direct Certification Address Verification Report and extend benefits to all eligible students.

Note: In Qmlativ the DC Import will process Reduced and Free eligibility codes at the same time, so you will only need to do one upload for your Medicaid File and one upload for your All Matches Free.

- **DC Manual Entry – Individual and Extension of Benefits**

- Individual

- Customer – **Food Service/Features/Customer**
 - Open Customer Record.
 - Locate the Direct Certification tab on the left hand side.
 - Select Add Direct Certification on Right
 - Enter details and save.

- **Extended Eligibility**

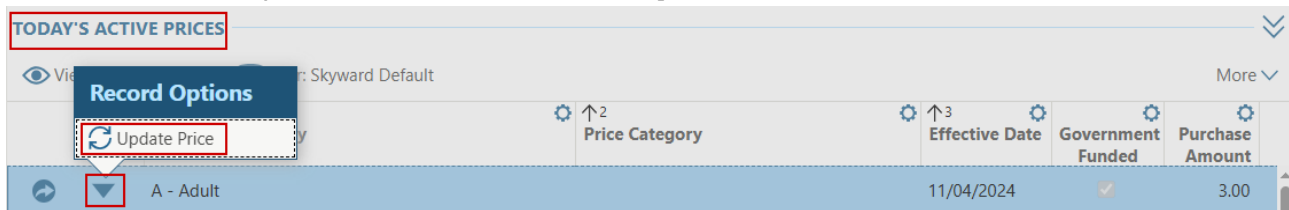
- Customer – **Food Service/Features/Customer**
 - Open Customer Record.
 - Locate the Direct Certification tab on the left hand side.
 - Locate the current DC Record.
 - Click on the inverted triangle and select **“Clone Direct Certification”**.
 - Check/uncheck household members to receive extended benefits, enter comments as needed, and **“Run Process”**.

Items/Point of Sale

This may be updated at the District or Entity Level.

For the Point of Sale to work properly, districts will want to ensure your items are priced correctly for the current school year and that your Line Configurations align with district guidelines and meal service times.

- Navigate to **Food Service/Features/Item**
- Highlight the item that needs a price adjustment.
 - From there, look at **"Today's Active Prices"** in the lower half of the screen.
- Click on the inverted triangle of the Eligibility Category/Price Category that needs updated and select **"Update Price"**.



- Enter updated pricing information and **"Save"**.
 - **Best Practice:** Use the same date from year to year for the Effective Date for consistency, i.e. 08/15/XX or the first day of school for each school year.

Note: Options available on the Update Item Price screen will change if an item limit is entered to allow the option to Stop Additional Purchases or Enter Additional Purchase Amount.

Line Configuration

Must be done at the Entity Level and each line must be updated manually.

Line details may need to be updated if changes have been made for the new year. It is always recommended to review the following:

- Navigate to **Food Service/Features/Line**

- **General Settings**

- Review Permissions and View Settings
- Line Tabs – Expand if you need to...
 - Add/Delete Items on Tab
 - Edit Start/Stop Times
 - Change Layout

- **Standard Item**

- Check Start/Stop Times against CY Bell Schedule

Note: If you have buildings whose meal service times vary based on the day of the week, you can create multiple lines to ensure the standard items process correctly.

District Specific Considerations

Districts may need to review/update setting in the following areas based on your district's configuration:

- Food Service
 - Codes
 - Consent to Share

Note: *CTS information is tracked in the Customer Details area.*

- Message Center
 - Notifications – Add/Edit notifications for Food Service.
- Online Forms
 - Online Forms Manager – Add/update forms as needed
 - Lunch Surveys, etc.

Monthly Reimbursement Claim

This can be run at the District or Entity level.

The Extract **MUST** be run prior to running reports to ensure accuracy.

- **Food Service/Features/Monthly Reimbursement Claim**
 - Click the Expansion Arrow on the month you are reporting on.
 - Click Extract on the upper right and configure as needed.
 - Run Extract.

Once the Extract has finished processing you can click through the tabs on the left of the screen to review information.

- **Food Service/Reports**
 - Monthly Reimbursement Claim Report (District)
 - Monthly Reimbursement Claim Report (Entity)

Miscellaneous

Reports – You will find that many of the reports you have run in SMS are available in Qmlativ, but the naming conventions have changed. In Qmlativ

many reports begin with 'Food Service', i.e. Food Service Daily Activity Report instead of Daily Activity Report. **Note:** You will want to create/save prompt templates for reports you use regularly.

List Views/Live Tiles - You can create and save multiple custom views for Application, Customer, and Payor Lists. You can create Live Tiles with these list views and export them to Excel.

Additional Resources

30 Day Grace Period Reset

This is required for all districts, even CEP Districts and Schools.

Recommendation- Create a Calendar Reminder to run on the 30th day of school. ***Do not run prior to the 30th day.***

- Navigate to **Food Service/Features/ 30 Day Grace Period Reset.**
- **Entities-** Select ALL.
 - Best Practices- Select all Entities; included inactive.
- **Start Date-** MUST be AFTER the *Mass Update Customer Price Categories Utility* has been run and BEFORE any *DC Imports and/or Applications* have been entered for the current school year.
- **End of 30 Day Grace Period-** 30th day of school.
- **Effective Date-** 31st day of school
 - Note that this day may fall on a weekend; that is acceptable.

30 Day Grace Period Reset
Enter Customer Category Details

→ Next Cancel

District
GCRISC School District

CUSTOMER CATEGORY DETAILS

*Select Entities **BEST PRACTICE: Select ALL Entites; even if inactive.**

CUSTOMERS WITHOUT A NEW FREE OR REDUCED ELIGIBILITY CATEGORY ADDED BETWEEN

*Start Date **Date selected must be AFTER the Mass Update Customer utility has been processed and before the first DC Import Application has been entered.**

*End Date **30th School Day after all meals have been served.**

WILL RECEIVE THE DEFAULT ELIGIBILITY CATEGORY ON

*Effective Date **31st day of school- this may fall on a weekend and that is acceptable.**

- **Eligibility Categories** should be only **Free** and **Reduced** Students.
- Check mark **“Include Manually Entered Eligibility Categories”**.
- Check Mark to **“Include Inactive Customers”**.

- Check Mark to **“Include Graduated Students”**.

ELIGIBILITY CATEGORIES TO PROCESS

*Eligibility Categories

Include Manually Entered Eligibility Categories ☒

Include Inactive Customers ☒

Include Graduated Students ☒

- Click **“Next”**.
- A preview screen will appear and will display if the system encountered any Customer Categories or Application Errors.
 - This may not display if there are no errors.
 - Select **“Cancel”** to address any errors.
- If there are no errors, click the **“Run Process”**.

30 Day Grace Period Reset
Review Customer Categories to be Added

Previous
Run Process
Cancel

District
GCRISC School District

CUSTOMER CATEGORIES TO BE ADDED

Search Customer Name
View: Skyward Default
Filter: Skyward Default
More

Customer Name	Grade	Previous Effective Date	Previous Eligibility Category	Previous Meal Reason Code	Previous Pri
Aceto, Helaine V	03	08/01/2023	F - Free	6	K-3 - K-3

Note: Users can export this data into Excel under the “more” button in the upper right hand corner of the screen.

Printing Food Service Letters

Review district policy, CNS/OSPI requirements for the current school year and update as needed.

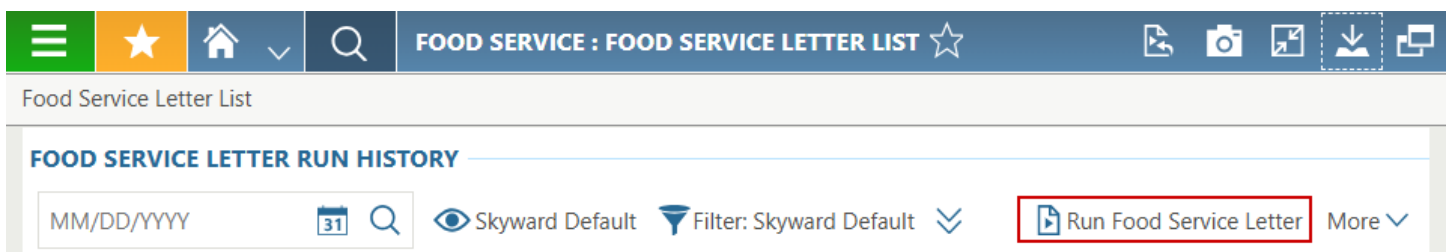
Updating Food Service Templates

Prior to running new year Food Service letters, ensure to review and make any necessary updates to your district's Food Service Letter Templates.

- To review your Food Service Templates, navigate to **Food Service/Features/Food Service Letter Templates**.

Mass Printing Approval/Denial Letters

- Navigate to **Food Service/Features/Food Service/Food Service Letter** and select the **“Run Food Service Letter”** option in the upper right hand corner of the screen.



Note: You can only select one Letter Type per a Scheduled Task/Print, but you can select multiple letter templates to process per letter type. You may need to create multiple scheduled tasks to automate the run process for all Letter Types.

- Create a run for the Letter Type and Templates you wish to run and/or Schedule.

Run Food Service Letters

Enter Food Service Letter Details

31

Schedule Task

→ Next

Cancel

Template

District

GCRISC School District

School Year

2025-2026

FOOD SERVICE LETTER RUN DETAILS

*Food Service Letter Report

Food Service Letters

*Letter Type

Application Eligibility Status

*Letter Templates

NOTICE OF ELIGIBILITY- EN

NOTICE OF ELIGIBILITY- SP

Clear

*Description

Notice of Eligibility

*Attachment Display Name

Notice of Eligibility

Group Letters By

☒ Family
☐ Primary Payor

LETTER SELECTION OPTIONS

Run Type

☒ Both Applications and Customer Categories
☐ Applications
☐ Customer Categories

Application Filter Type

☐ Individual
☒ Range

Note: There are numerous filters that can be applied to create specific groups of Direct Certifications, Application and 30 Day Notices. The below screenshots are examples of one way a district could configure and create an automated schedule.

- Configure Letter Distribution/Setup Options per district guidelines.

Application Filters (modified)

District: GCRISC School District

School Year:   Clear

Primary Applicant Name Key: Low - Show all values — High - Show all values

Application Number: Low - Show all values — High - Show all values

Case Number: Low - Show all values — High - Show all values

Annual Income: Low - Show all values — High - Show all values

Application Date Range: 7 Days Ago   — 1 Day Ago  

Effective Date Range: 07/01/1999 Thursday   — 06/30/9999 Wednesday  

Eligibility Category:   Clear

Application Status: Show all values
☐ [No Data]
☐ WIP
☐ Active
☐ Inactive

Application Denied: Show all values ▼

Selected For Verification: Show all values ▼

Verified For Cause: Show all values ▼

Note: If you are running for Denied Applications you would set the parameters to Application Denied – Yes.

Configuring Scheduled Tasks

Schedule the task to run based on the Application Date ranges set.

- Once configuration is completed either select **“Schedule Task”** to set up an automation or use the **“Next”** option to preview and print your food service letters.

Run Food Service Letters
Enter Food Service Letter Details

Schedule Task → Next Cancel Template

District: GCRISC School District School Year:

FOOD SERVICE LETTER RUN DETAILS

*Food Service Letter Report: Food Service Letters

- For the settings in the *above example*, you would choose a Frequency of Weekly and select Saturday or Sunday for the run day. Your start date should be the current date, with your end date set to the last day of school *for the current school year*.

Run Food Service Letters
Schedule Notification

Save Cancel

District: GCRISC School District School Year: 2025-2026

FOOD SERVICE LETTER RUN HISTORY DETAILS

*Scheduled Task Name: Eligibility Notice

Frequency: Weekly

Sunday ☐
Monday ☒
Tuesday ☐
Wednesday ☐
Thursday ☐
Friday ☐
Saturday ☐

*Start Date: 08/01/2025 Friday

End Date: 06/30/2026 Tuesday Last day of school.

*Start Time: 05:00 AM

Printing Individual Approval Letters

- Navigate to **Food Service/Features/Food Service/Food Service Letter** and select the **“Run Food Service Letter”** option in the upper right hand corner of the screen.
- Create a run for the Letter Type and Templates you wish to run and/or Schedule.

Note: There are numerous filters that can be applied to create specific groups of Direct Certifications, Application and 30 Day Notices. The below screenshots are examples of one way a district could configure to print letters individually.

The options available for selection will depend on the **Run Type** selected. To pull information for students eligible based on a DC Import select a Run Type of **Customer Categories**.

- Select your distribution type and configure your letter setup if sending via email.
- Select **“Next”** to preview selected students – continue through the next/preview steps to select Run Process.

Run Food Service Letters
Enter Food Service Letter Details

31 Schedule Task → Next Cancel Template

District: GCRISC School District School Year: 2024-2025

FOOD SERVICE LETTER RUN DETAILS

*Food Service Letter Report: Food Service Letters

*Letter Type: Application Eligibility Status

*Letter Templates: ☒ NOTICE OF ELIGIBILITY- EN ☒ NOTICE OF ELIGIBILITY- SP

*Description: Notice of Eligibility

*Attachment Display Name: Notice of Eligibility

Group Letters By: ☒ Family ☐ Primary Payor

LETTER SELECTION OPTIONS

Run Type: ☐ Both Applications and Customer Categories ☐ Applications ☒ Customer Categories

Customer Category Filter Type: ☒ Individual ☐ Range

*Select Customers:

*Select Eligibility Categories:

LETTER DISTRIBUTION OPTIONS

☒ Send Option ☐ Select

☐ Family Access Portfolio

☐ Physical Letter

☐ Email

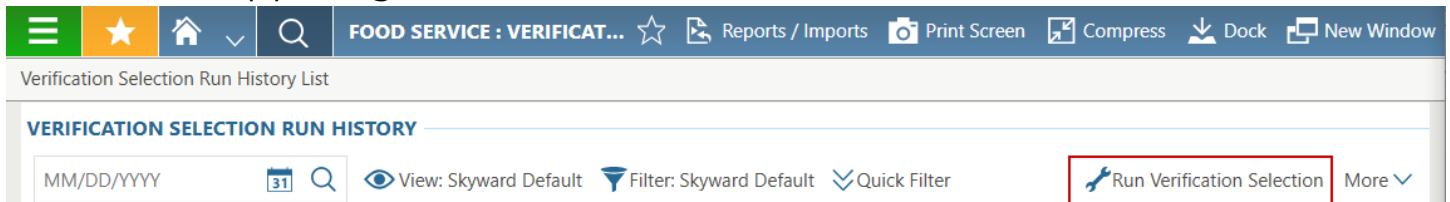
Verification

This task should be run at District Level.

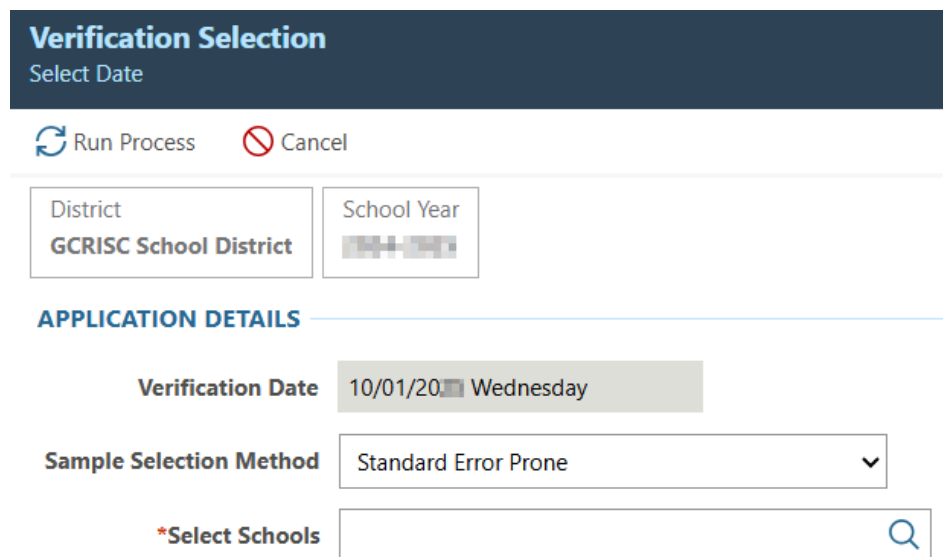
Verification Selection Run History

To run Food Service Verification:

- Navigate to **Food Service/Features/Verification Selection Run History**.
- In the Upper right hand corner click **“Run Verification Selection”**.



- Configure and Run Process. (Count date is October 1st/1st business day in October).



- Once the extract has been processed, users can enter response information in the Applications area of the Run History Screen or via the Customer Detail screen.

Note: You cannot delete an extract, but you can release an application selected for Verification.

Managing Verification Records

To replace a selected application:

- Click on the expansion arrow and select

APPLICATIONS

No Search Available View: Skyward Default Filter: Skyward Default

	↓ ¹ Selected	↑ ² Replace Application	↑ ³ Primary Applicant Name	Effective Date	Eligibility Category	Verification Result
	☒	☐	Cushenberry, Candie M	09/01/20	Free	Verification in Process
	☐	☐	Ade, Jalisa A	09/28/20	Free	Not Selected for Verification
	☐	☐	Wittenberg, Dominique T	09/12/20	Free	Not Selected for Verification
	☐	☐	Yanni, Gayla M	09/15/20	Free	Not Selected for Verification
	☐	☐	Zinner, Machele X	09/12/20	Free	Not Selected for Verification

- Verification on the left of the screen and scroll down to the Verification Tracking section in the application.
- Check the box to Replace Application and select Save Changes.

Application Profile

Application: Type to search... Filter: All Quick Filter

Primary Application Member: Cushenberry, Candie M Application Status: Active Error Prone Application: False Date Last Updated: 2/14/2024 7:30:33 AM Entry Method: Manual Eligibility Category: Free

Save & Back Save Changes Cancel

General

Profile

Contact History

Verification

*Eligibility Category: F Free

WA STATE REPORTING

*State Free Reduced Meal Reason: 1 Meal Application/Household Size & Income - Free

VERIFICATION TRACKING

Verification Status: ☐ Select

☒ Replace Application

☐ Direct Verification (DV) Complete

☐ DV not attempted, OR DV did not yield a match. Verification letter (First Request) was sent.

☐ Household did not respond to first request. Second notice completed.

☐ Household did not respond completely, OR household did not respond at all by deadline of second notice.

- Return to the Verification Run History and re-run the extract by selecting Run Verification Replacement on the upper right.

WSIPC Middle School - 201

2023-2024 (Current)

FOOD SERVICE : VERIFICATION SELECTION RUN HISTORY LIST

Verification Selection Run History List

Run Verification Selection Run Verification Replacement

Run Date	Run By	Sample Selection Method	Is Replacement	Number of Applications Available	Number of Applications Required	Number of Replacements Needed	Number of Replacements Made	Number of Applications Selected	Selected Req Amount
2/14/2024 7:30:34 AM	ESDMirenta, Kimberley (SC112)	Standard Error Prone	☒	5	1	0	0	1	☒
2/13/2024 11:42:32 AM	ESDMirenta, Kimberley (SC112)	Standard Error Prone	☐	0	0	0	0	0	☐
2/13/2024 11:42:06 AM	ESDMirenta, Kimberley (SC112)	Standard Error Prone	☐	0	0	0	0	0	☐

Verification Reports

- (WA) Verification Collection Reports
- Verification Collection Reports