

MINUTE MENU CX START-UP GUIDE

A guide to a smooth transition to the Minute Menu CX program. This guide includes links to help documents, e-Learning Courses, and training videos that guide users through each task needed to take full advantage of the Minute Menu CX program.

For Centers

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Center Monthly Process Checklist

Welcome to Minute Menu CX! The program has been designed to help you record the information needed to participate in the USDA food program and to help you get the highest reimbursement possible, every month!

Each month, these tasks will need to be completed:

- [View Child Roster](#)
- [Enroll New Children](#)
- [Withdraw Children Who Have Left](#)
- [Start Planning and Recording Menus](#)
- [Estimate Attendance](#)
- [Print Menu Production Records](#)
- [Print and Distribute Weekly Attendance + Meal Count Report](#)¹
- [Record Actual Attendance](#)
- [Record and Mail Receipts](#)²
- [Submit Required Paperwork](#)
- [Submit Claim](#)

This guide will train you how to do each of these monthly tasks, and more. Please take advantage of the blue-underlined clickable hyperlinks located throughout this guide that link to various training videos and training documents.

¹ Not applicable if using cx2go

² Enter receipts only if instructed by Sponsor/Back-Office

Training

Start the Training Process

Go to training.minutemenu.com and access the "CX Center Training" page. Familiarize yourself and key staff members with the various training documents, training videos, and e-Learning courses available on the website.

Watch the [Center Monthly Process Overview](#) training video for an overview of Minute Menu CX. Then watch all other available videos listed in the "Center Videos" section of the [video library](#).

Installation and Login

Installation

To install Minute Menu CX for the first time, or to install on additional computers, go to www.minutemenu.com/centerwelcome and follow the installation instructions provided on-screen.

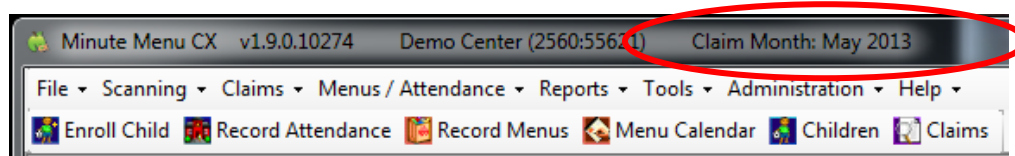


After the program is installed, locate the green Minute Menu CX apple icon located on your computer desktop. Use the login ID/password that have been provided to you. If you do not know your login ID and password, please contact your food program Sponsor/Back-Office.

Click [here](#) to view a blog post about installing Minute Menu CX on multiple computers.

Advance Claim Month (If Needed)

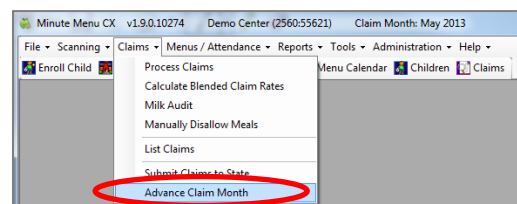
Make sure that the claim month listed at the top of the screen is on the current calendar month.



If the month listed is not correct, change it by going to **Claims >> Advance Claim Month**. Then click the + key to go forward (or – key to go back). Be sure to save before exiting the screen. The month listed at the top of your screen will immediately update.

For more information about your claim month, please read the [Change Claim Month](#) training document.

If the option is disabled, please contact your food program Sponsor/Back-Office.



Enrolling/Importing Children

Child Status

Children in Minute Menu CX may have one of these three possible statuses:

- **Pending:** The child has been enrolled into CX but the enrollment form and income eligibility forms have not yet been received/approved by the Food Program Sponsor/Back-Office.
- **Active:** The child has been enrolled into Minute Menu CX and a signed enrollment form and income eligibility form have been approved, and the child has been activated.
- **Withdrawn:** Child is no longer in care at the center, the child data is still available, but the child will not show up on reports after the withdrawal month.

Pending: Waiting for paperwork

Active: Completed enrollment

Withdrawn: No longer in care

Center Dashboard

View the [Center Dashboard](#) training video to learn how to use the dashboard to make sure that all required information is collected. This will help you maximize your reimbursement.

Also, view the [Center Dashboard Help Document](#) for a detailed explanation of how this tool works.



Child Roster

Run the Child Roster report by going to **Reports >> Children >> Child Roster**. Use this report to:

- Verify child classrooms
- See if children need to be enrolled/withdrawn
- Any other reason you need a list of all enrolled children

Importing Children

A recurrent import from another program such as Procure 10 may be possible.

PROCARE

- If a Procure 10 import will be used, DO NOT enroll the children (the *initial* import is an integral part of the process).
- The Centers Integration Service (CIS) requires some setup. Please speak to your food program Sponsor/Back-Office for assistance in setting up the import.

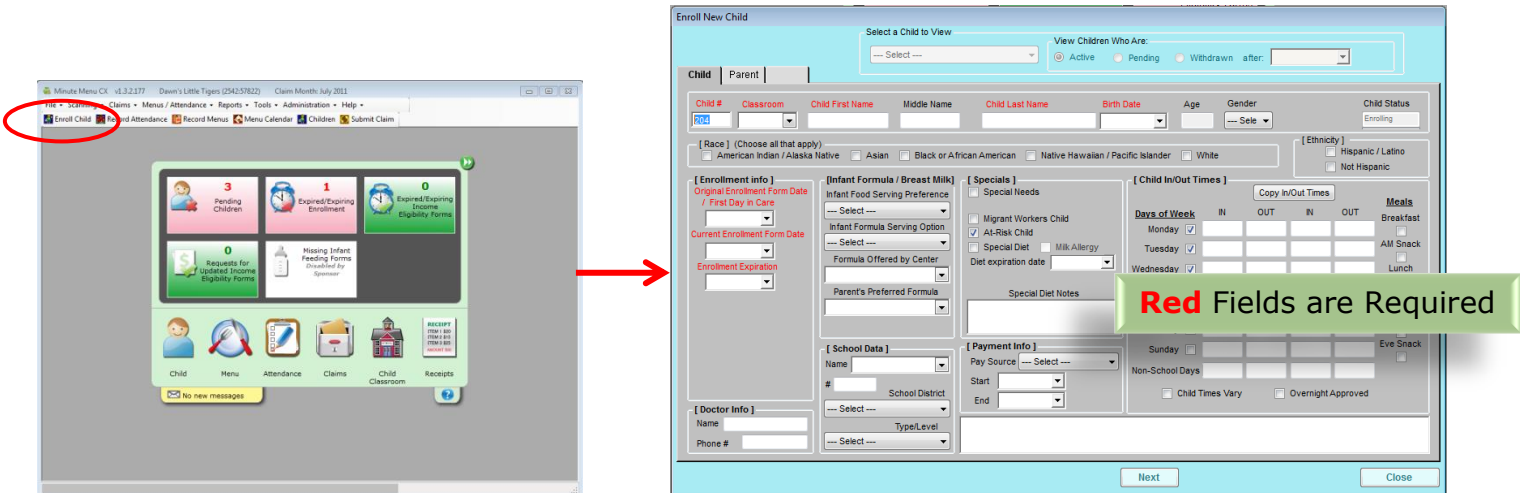
OTHER SOFTWARE

Importing children from other programs may be possible, but some setup may be required. Please contact your Implementation Specialist to see if an import is possible.

Enroll Children

To enroll a child, click the **Enroll Child** button. Fill out information on both tabs: **Child** and **Parent**.

View the [Enroll Child](#) training video and take the [Getting Started: Enrolling Children](#) e-Learning course to learn more about enrolling children into Minute Menu CX.



To initially obtain the child information from the parent, you can have parents fill out a blank child enrollment form. To print this form, go to **Reports >> Children >> Blank Child Enrollment Form**.

After the child has been enrolled in Minute Menu CX, the enrollment form and Income Eligibility form (if applicable) will need to be printed, signed by the parent, and mailed to the food program Sponsor/Back-Office for verification.

The child will have a "pending" status when initially enrolled. Once your Sponsor/Back-Office has received the required documents, the children will be changed to "active" status. Make sure to submit all required paperwork to your food program Sponsor/Back-Office since "pending" children are typically not reimbursable.

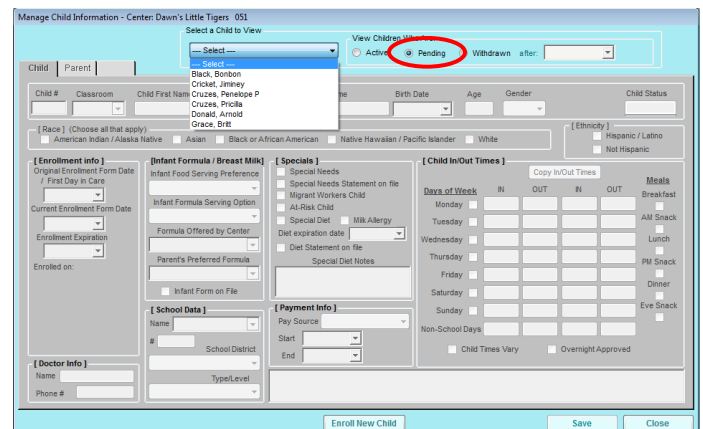
TO ACCESS PENDING CHILDREN

1. Click the **Child** icon to open the Manage Child Information screen.
2. Select the Pending option (directly to the right of the "Select a Child to View" dropdown box).
3. Select the child's name from the list.



TO ACCESS ACTIVE CHILDREN

1. Click the **Child** icon to open the Manage Child Information screen.
2. Select a child from the dropdown box. (Active children are displayed in the list by default).



Withdrawing Children

1. Open the Manage Child Information screen by clicking on the **Child** icon on the dashboard.
2. Select the child to withdraw from the "Select a Child to View" dropdown box.
3. Click the **Withdraw** button at the bottom left corner of the screen.
4. Provide an effective date for the withdrawal (this date should be the last day that the child will be in care at the center) and then click **Continue**.



The screenshot shows the "Manage Child Information" screen for a child named John Christopherson. A red arrow points to the "Select a Child to View" dropdown menu, which is currently set to "Christopherson, John". To the right of this dropdown is a "View Children Who Are:" section with radio buttons for "Active", "Pending", and "Withdrawn", and a date field labeled "after:". The "Withdrawn" radio button is selected. Below this is a "Withdraw Child" dialog box with the text "Please supply an effective withdrawal date for:" and a date field set to "8/26/2013". The dialog has "Continue" and "Cancel" buttons. At the bottom of the main screen, the "Withdraw" button is circled in red.

TO ACCESS WITHDRAWN CHILDREN

To access children *after* they have been withdrawn, change the filter options listed directly to the right of the select child dropdown box to the **Withdrawn** option. If the child is not visible, try changing the "withdrawn *after*" date to something further back.

This close-up shows the "Select a Child to View" dropdown menu set to "-- Select --". To its right is the "View Children Who Are:" section. The "Withdrawn" radio button is selected and circled in red. Next to it is the "after:" label and a date field set to "2/21/2011".

Reactivating Children

If a child leaves the center and then comes back, in some cases (depending on how much time has passed) the child can be reactivated, rather than having to completely re-enroll the child.

To reactivate a child:

1. Open the Manage Child Information screen by clicking on the Child icon on the dashboard.
2. Change the filter option to the right of the dropdown box to Withdrawn
3. Select the child to reactivate from the dropdown box
4. Click the **Reactivate** button at the bottom left corner of the screen

Manage Child Information - Center: Dawn's Little Tigers 051

Select a Child to View: View Children Who Are: Active Pending Withdrawn Filter:

Child | Parent

Child #	Classroom	Child First Name	Middle Name	Child Last Name	Birth Date	Age	Gender	Child Status
27	INF2	Rachel		Greene	1/4/2012	1y7m	---	Withdrawn

[Race] (Choose all that apply)
 American Indian / Alaska Native Asian Black or African American Native Hawaiian / Pacific Islander White

[Ethnicity]
 Hispanic / Latino Not Hispanic

[Enrollment info]

Original Enrollment Form Date / First Day in Care:

Current Enrollment Form Date:

Enrollment Expiration:

Enrolled on: 1/23/2012

Withdrawn: 1/22/2013

[Doctor Info]

Name:

Phone #:

[Infant Formula / Breast Milk]

Infant Food Serving Preference:

Infant Formula Serving Option:

Formula Offered by Center:

Parent's Preferred Formula:

[School Data]

Name:

#:

School District:

Type/Level:

[Specials]

Special Needs

Migrant Workers Child

At-Risk Child

Special Diet Milk Allergy

Diet expiration date:

Special Diet Notes:

[Payment Info]

Pay Source:

Start:

End:

[Child In/Out Times]

Copy In/Out Times

Days of Week	IN	OUT	IN	OUT	Meals
Monday <input checked="" type="checkbox"/>	8:00 AM	5:00 PM			Breakfast <input checked="" type="checkbox"/>
Tuesday <input checked="" type="checkbox"/>	8:00 AM	5:00 PM			AM Snack <input type="checkbox"/>
Wednesday <input checked="" type="checkbox"/>	8:00 AM	5:00 PM			Lunch <input type="checkbox"/>
Thursday <input checked="" type="checkbox"/>	8:00 AM	5:00 PM			PM Snack <input type="checkbox"/>
Friday <input checked="" type="checkbox"/>	8:00 AM	5:00 PM			Dinner <input type="checkbox"/>
Saturday <input type="checkbox"/>					Eve Snack <input type="checkbox"/>
Sunday <input type="checkbox"/>					

Non-School Days:

Child Times Vary Overnight Approved

In some cases, the reactivated child's status may change to **Active** and is immediately eligible for reimbursement. However, if the child's status changes to **Pending** status, a new enrollment form will need to be printed, signed by the parent, and submitted to the food program Sponsor/Back-Office. To see the status of the child after reactivation, find their name in the select child dropdown box and filter by active or pending status.

If too much time has lapsed since the child's enrollment expiration date, the program will not allow the child to be reactivated. In this situation, enroll the child as if he/she is brand new to the center.

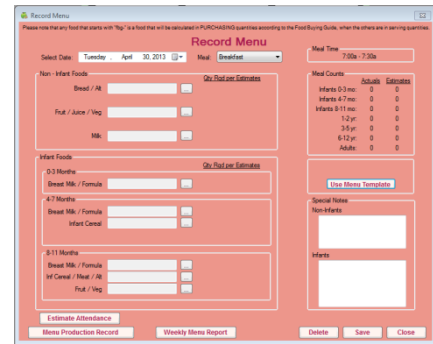
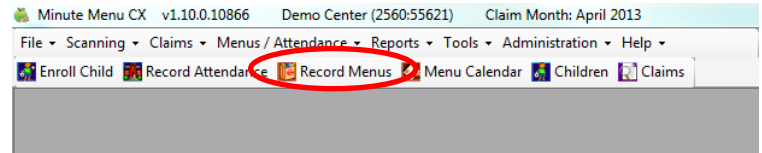
Foods and Menu Planning

Planning and Recording Menus

Get started planning and recording menus! Click [here](#) to view the Planning and Recording Menus help document. Watch the [Record Menu](#) training video to learn how to record a menu. Take the [Foods and Menu Planning](#) e-Learning class to learn how to record menus quickly, how to use the Estimate Attendance function, and to see real examples of the Menu Production record.

Menus can be recorded anytime, so feel free to preplan menus or record them as you go.

To get started, click the **Record Menus** button at the top left of the screen. You can use menu templates (see the [Create Menu Templates](#) section of this guide) or select foods individually.



Menu Calendar

After you've recorded a few meals, take a look at the **Menu Calendar** (accessible from the plate/fork icon on the dashboard). Any day with a meal recorded will display the abbreviation for that meal (BALPDE). Double click any day to edit a meal on that date.

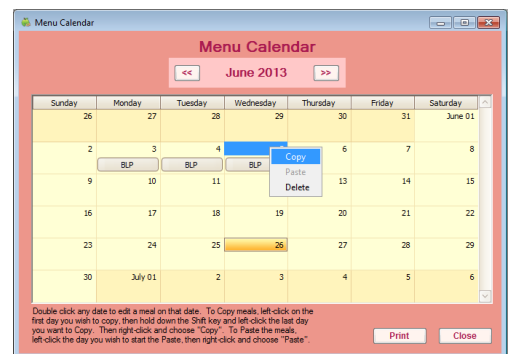
You can copy and paste meals from the Menu Calendar. Copy and paste a single day, a week, or even a month if you like!



To copy and paste a **day** of meals: Right click on the day you wish to copy and select the "Copy" option. Then right click on your desired date and select "Paste."

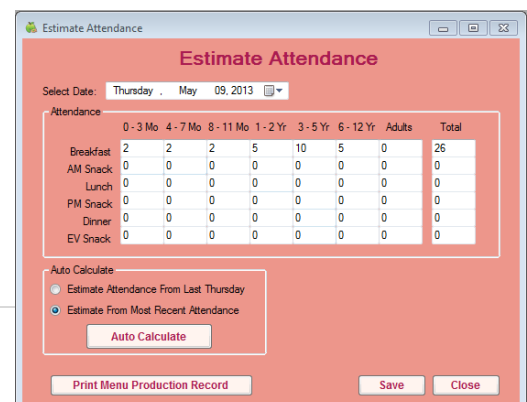
To copy and paste **more than one day** of meals:

- Click on the first day you want to copy.
- Hold down the SHIFT KEY on your keyboard while you select the last day of the range that you'd like to copy.
- Right click on the selected area and choose the "Copy" option.
- Select the first day in the range you'd like to paste to, right click, and choose the "Paste" option.



Estimate Attendance

After menus have been recorded, watch the [Estimate Attendance](#) training video. The Estimate Attendance tool assists users in planning how much food to purchase and prepare. After a meal is



planned, use the tool to make an educated guess on how many children will be present on future days. Then, view the Menu Production Record (MPR) to see how much food will be needed based on those estimates.

To estimate attendance, go to **Menus/Attendance >> Estimate Attendance**. Or use the shortcut button from the **Record Menus** screen. Type your own estimates in the grid at the top or use the auto calculate feature at the bottom.

Menu Production Record

Once menus have been recorded and attendance has been estimated, view the Menu Production Record. A shortcut button is provided on the Estimate Attendance screen AND the Record Menu screen. The report can also be accessed by going to **Reports >> Menus >> Menu Production Record**.

The Menu Production Record will display the foods, the quantity of food needed for each age group, and the total amount of food needed based on the estimates you provided.

The final "actual" food quantity totals will not be displayed on the report until the actual attendance/meal counts have been taken for that meal.

Demo Center 1 4155141415		Non Infant Menu Production Record Thursday 05/09/2013						Demo Center 4155141415	
Breakfast		1-2 Yrs	3-5 Yrs	6-12 Yrs	Adults	Total	Total Including Infants		
	Estimated Attendance	5	10	5	0	20	26		
	Actual Attendance								
Component	Food Served/Planned	Reqd Serving Size By Age				Qty Needed Per Est Attendance	Qty Needed Per Actual Attendance	Comments	
Brd/Alt	Waffles	1/2 serv	1/2 serv	1 serv	2 serv	12 1/2 serv			
Veg/Frt/Juice	Bananas	1/4 c	1/2 c	1/2 c	1/2 c	8 3/4 c			
Milk	Fluid Milk	1/2 c	3/4 c	1 c	1 c	15 c			

Quantity Needed Per *Estimated* Attendance

The program will determine how much food is needed for all age groups based on Estimated Attendance.

Quantity Needed Per *Actual* Attendance

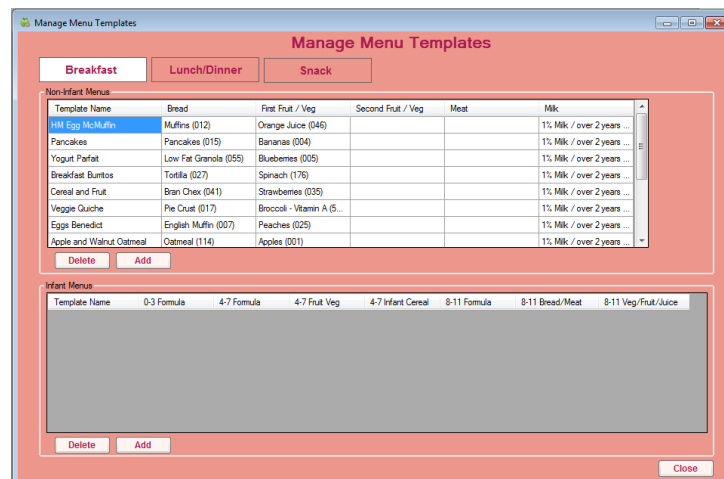
This column will automatically be calculated and displayed, after the actual meal counts have been entered for that meal.

Create Menu Templates (Optional)

Make menu planning more efficient and create reusable menu templates! Watch the [Creating Menu Templates](#) training video located on training.minutemenu.com to get started.

To create a menu template:

1. Open Minute Menu CX
2. Go to **Menus/Attendance >> Manage Menu Templates**
3. Choose the category to add a meal to: Breakfast, Lunch/Dinner, or Snack.
4. Click the **Add** button to create a new template
5. Give the template a short but descriptive title
6. Record the food components for the meal by clicking the [...] button
7. Click **Save**



To use the template you created, click the **Record Menus** shortcut button.

For any meal type that has a template available, you will see a **Use Menu Template** button on that screen. (The menu template button will not be visible for meals that do not have templates available.)

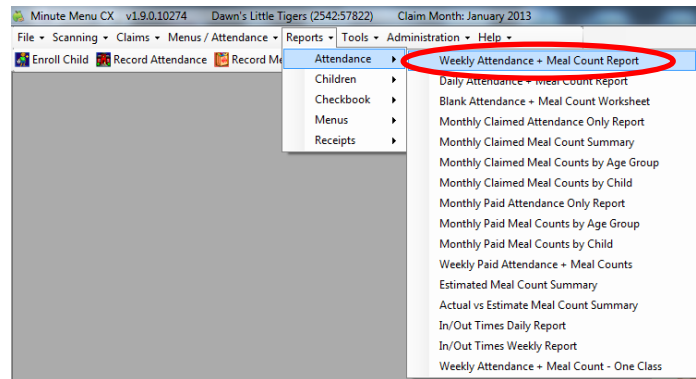
Recording Attendance/Meal Counts

There are 3 ways to record attendance and meal counts in Minute Menu CX:

1. Manually (Record Menus screen)
2. Scanning
3. cx2go (mobile app)

For recording menus manually (#1) and for scanning (#2), the Weekly Attendance and Meal Count report will need to be printed weekly, distributed to each classroom, filled out at the point of service, and then submitted to the person that will be entering or scanning the data into Minute Menu CX.

To print the Weekly Attendance + Meal count report, go to **Reports >> Attendance >> Weekly Attendance + Meal Count Report**. Watch the [Recording Meal Counts and Attendance on Paper](#) training video. Use the [Properly Marking Attendance and Meal Count forms](#) document to train Staff to fill out this form correctly.



Manually

After the Weekly Attendance + Meal Count report has been submitted for the week, the information will need to be recorded into Minute Menu CX.

Click the Attendance icon on the dashboard to open the function. Make sure that the correct day is selected, and then filter by classroom to make data entry easier.

Watch the [Recording Meal Counts and Attendance into Minute Menu CX](#) training video for more information.



Mark **Sick** if the child is IN CARE at the CENTER because he/she is too sick to go to school.

Mark **"Sch Out"** for school aged children who eat AM Snack or Lunch when they would normally be in school.

Use the **"select all"** check boxes at the bottom for quicker entry.

Scanning

Your food program Sponsor/Back-Office may optionally choose to scan the Weekly Attendance + Meal Count report. Specific guidelines *must* be followed when printing and filling out the forms.

Hint: Keep a copy of the "Properly Marking Attendance and Meal Count Forms," in every classroom.

Use the [Properly Marking Attendance and Meal Count forms](#) document and the [Meal Counts and Attendance with Scanning](#) e-Learning course on training.minutemenu.com to train staff to fill out forms correctly.

Read scanning blog(s) located on blog.minutemenu.com.

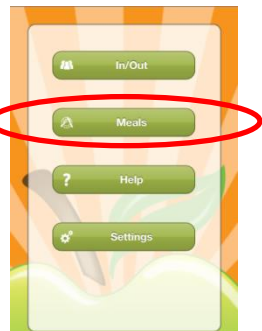
cx2go Mobile App

The cx2go mobile app can be used to record attendance and meal counts and child in/out times on a daily basis. Please see the [cx2go website](#) for more information.



The full version of the program is still needed for tasks such as: enrolling children, managing classrooms, recording menus, printing reports, etc.

The app can be accessed from various smart phones, tablets, and laptops. To access the app from a laptop, go to cx2go.mobi using either the Chrome or Safari web browser (it will not work using Internet Explorer.)



Record daily meal counts into the app at the time of each meal serving. Click the **Meals** button to begin recording and then select the meal. Children can be selected individually, or multiple children can be marked in attendance at once. To mark several children in attendance at once, click the **Edit** button, select each child in attendance, click the **Edit Selected Children** button, select each applicable option, and then click the **Apply** button. (Please also see the note above about the "Sick" and "School Out" options on the Record Attendance screen.)

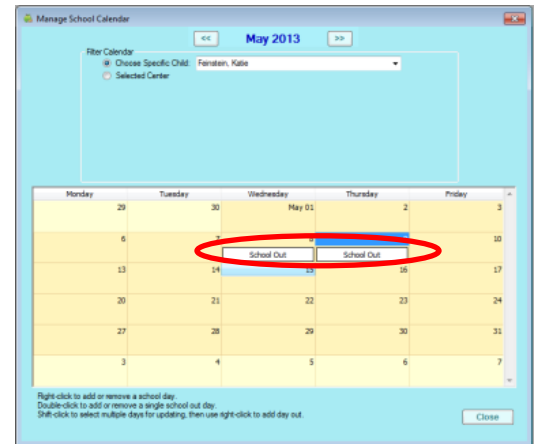
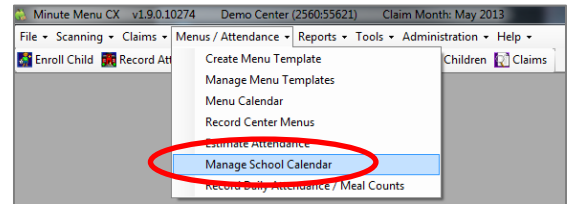
For more information, read the [Shortcut for Recording Meal Counts in cx2go](#) blog post.

Two training videos on cx2go are currently available. Watch the [cx2go – Recording Meal Counts and Attendance](#) training video to learn how to record daily meal counts and attendance. Watch the [cx2go – Recording In/Out Times](#) video to learn how to record daily child in/out times in the app.

Manage School Calendar

You can optionally choose to use the **School Calendar** to mark school-out days, if you prefer, rather than adding it on the Record Attendance screen.

The calendar is accessible from **Menus/Attendance >> Manage School Calendar**. Select a specific child or your center as a whole, and then double-click on a calendar date to add the “school out” designation.



Receipts

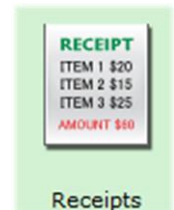
Enter and Mail Receipts

Some centers are required to enter their own receipts into Minute Menu CX and then mail them for verification. However, even if you're not required to enter them yourself, they should still be mailed to the food program Sponsor/Back-Office.

To enter receipts into Minute Menu CX, click the Receipts icon on the dashboard.

Watch either the training video [Enter Receipts - Quick Entry](#) or [Enter Receipts – Itemized Entry](#) – as directed by your food program Sponsor/Back-Office.

To enter vendors for food/supplies, go to **Tools >> Manage Vendors**. Watch the [Manage Vendors](#) training video for more information on adding vendors.



End of Month Tasks

Submit the Claim

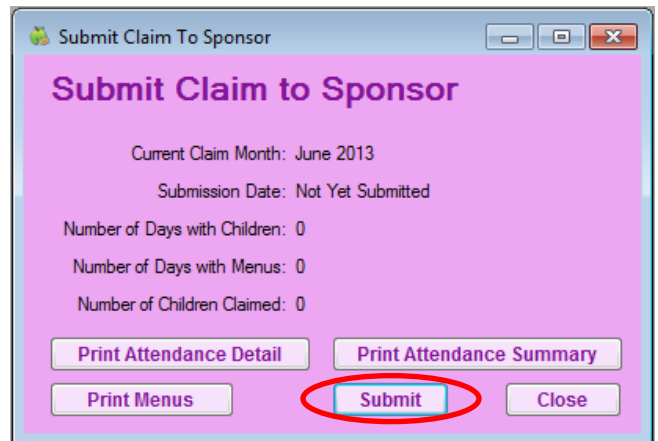
At the end of each month, all of the data will need to be “submitted” to the food program Sponsor/Back-Office. To submit the claim, click the **Submit Claim** button.

The Submit Claim to Sponsor screen will open. The screen provides links to three reports for you to review to make sure the claim is complete before submitting it. Those reports are:

- Attendance Detail Report
- Attendance Summary Report
- Center Weekly Menus Report

After verifying that all data has been accurately entered, click the **Submit** button.

Once you have submitted your claim to the food program Sponsor/Back-Office, your claim month will automatically advance to the next month.



Resources

Minute Menu Corporate Website

www.minutemenu.com

Minute Menu Training Website

training.minutemenu.com

Minute Menu Blog Website

blog.minutemenu.com

Minute Menu Technical Support Email Address

cxhelp@minutemenu.com

Minute Menu Main Phone

(972) 671-5211

Minute Menu Fax

(972) 235-8651