

Harvest FFVP Claims Entry Training

Agenda

This training session will show the process for Creating, Entering, Submitting claims for FFVP within Harvest. We will also recap basic Harvest functions covered in earlier training sessions.

At the conclusion of this training session, FFVP Claimants should be able to:

1. Access Harvest
2. Request Harvest Credentials / Modify Existing Credentials
3. Create / Enter / Submit an FFVP Claim
4. Review AOE Messages for Returned Claims
5. Reopen and Revise previously processed claims.
6. Submit Helpdesk issues

How to Access the Harvest Landing Page

To access the system, please go to: <https://harvest.education.vermont.gov>

Users who had credentials under the previous Child Nutrition Management System will have their UserIDs converted to Harvest. These existing users must use the Forgot Password process to reset their passwords.

Users who did not have credentials for the previous Child Nutrition Management System must request new credentials via the New User process. Steps for obtaining a New UserID include:

7. Click on the New User link
8. Search for, and select the Organization for which you work
9. Select the role you are requesting (usually Data Entry)
10. Submit your request to AOE for review
11. You will receive an email with a temporary password within 48 hours if your request is approved by AOE.
12. Log on with your UserID and temporary password
13. Complete the process of changing your password
14. You should reach the Harvest Dashboard page

Accessing Claims within Harvest

To access Claims, click the Claims menu shown in the image below.

The current Program Year will display (based on a 7/1 – 6/30 Program Year) in the Drop Down to the left. This Drop Down can be changed to retrieve prior years claims.



For the Current Program Year, programs where the SFA has an approved application for that program year will display, along with claim months available.

Click the month for which you want to access the claim.



Image 1 – Claims Menu

Below the list of months, each program will display a Yearly Summary that shows each month through the year, the details of that claim, including payment amounts, revisions, and Vision Voucher Numbers. This Summary will be available in late 2021.

Claims Actions and Messages

Create Claim – Unauthorized Message

If you click a month for which the claim has not yet been created, and your account does not have the access to create a claim in Harvest, you will receive the following message:

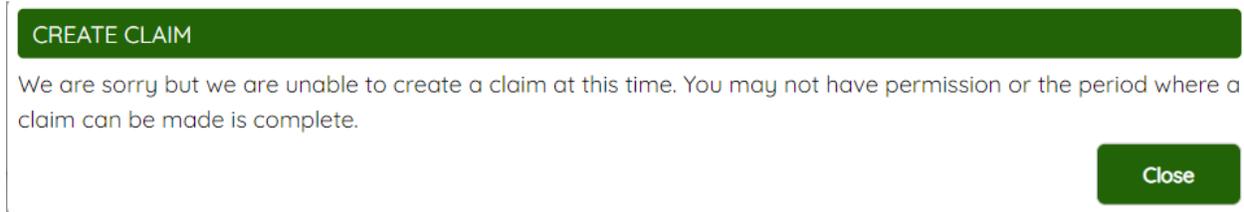


Image 2 – Create Claim Not Allowed Message

Create Claim

Upon clicking a month for which a claim has not already been created, a message box will appear asking to confirm if you want to Create Claim for that month. Clicking Yes will create and open the SFA claim for that month. Clicking No will result in no claim being created, and the grid of months will continue to display.

Reopen a Claim

Once a claim has been submitted, but has not yet been sent to the State Payment System (or paid), the claim can be Reopened by the SFA to make modifications. This differs from a claim

Revision. If it is Reopened, the submission to the state is canceled. Reopened claims must be resubmitted in order to be reviewed. The following image illustrates the Reopen prompt.

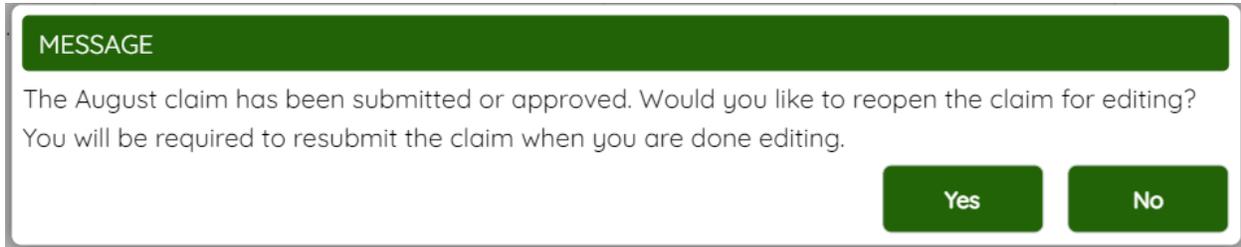


Image 3a – Reopen a Claim

Revise a Claim

After a claim has been submitted, and that claim has been forwarded to the State Payment System (or paid), that claim can no longer be Reopened, but rather can be Revised. The prior claim revision will display, allowing the SFA to add more sites, or modify existing sites on the claim month. The new total amount will display, but only the variance between the prior revision, and the current revision will be paid. If the amount of the revision is less than the prior revision, an Offset will be created to be withheld against future claims.

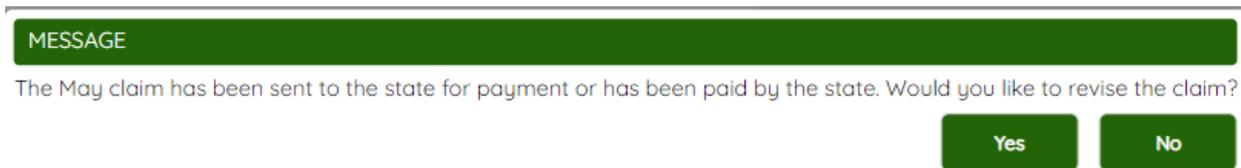


Image 3b – Revise a Claim

Access Levels – Edit vs. View

Viewing a claim does not allow any updates to be saved. Viewing occurs when a user does not have authority to Save claims, or if when prompted “Do you want to Revise your claim?”, and the user clicks No, the claim will open in View Mode.

Clicking Open or Start will enable updates to be saved to the claim. Make sure to resolve any error messages after clicking Save (if any) so that your updates are saved to the Harvest database.

Entering an FFVP Claim

FFVP Claims are entered at the Site Level. Some SFAs may have allocations for multiple sites, while others have allocations for a single site. The SFA should enter the claim amount for each site, and then return to the Main Claim level (SFA Level) in order to Certify/Submit the claim at the SFA level.

The tabs at the Organization Level include:

- Site Listing
- Acknowledgement and Certification

Actions on the Site Listing Page

Once a claim has been accessed, the first page (Site Listing) will display. Users who do not have access to create or update a site will see “View” as an option after the SFA has created a claim for that site. For users with the authority to create or update a site claim, they have the option to click ‘Start’ (create) or ‘Open’ (update) for each site, one at a time. The site listing validates against the site applications. If a site application does not provide service during a month (e.g., July), the site will show ‘Ineligible’ for that month.

Completing the Site Level Pages

Once a site has been accessed, the following pages will be visible:

- Fruits and Vegetables
- Operating Costs (optional)
- Administrative Costs (optional)
- Site Summary (nothing entered here)

Since sites have allocations for FFVP, the amount of the claim is validated so that the amount claimed does not exceed the allocation amount. This also factors in previous claims for the site processed earlier in the year.

The Administrative Costs are not allowed to exceed 10 percent of the allocation. These edits are enforced on claims being entered and claims previously processed are considered in this validation.

The site level pages are not submitted. Rather, the claim is submitted at the SFA level.

Fruits and Vegetables Page

At the top of the Fruits and Vegetables Page, the number of days served during the month must be entered. The number of days is validated against the days served within the Site Application. The underline under the Number of Days field indicates that the field is required.

10 blank rows for Fruits are displayed by default for each site, as well as 10 blank rows for Vegetables. If any site needs more than 10 rows for either section, click the ‘Add More Rows’ link in the bottom left to display 5 more rows. There is no limit to the number of additional rows that can be added.

On each row, enter the Product, Number of Units, select the Unit Type from the drop-down list, and enter the Unit Cost. Upon tabbing out of the Unit Cost field, the Total Cost for the row and all totals across the page will calculate automatically.

Harvest will be updated during the 2021-2022 Project Year to include sections for “Pre-Approved” Fruits and Vegetables.

Operating Costs Page

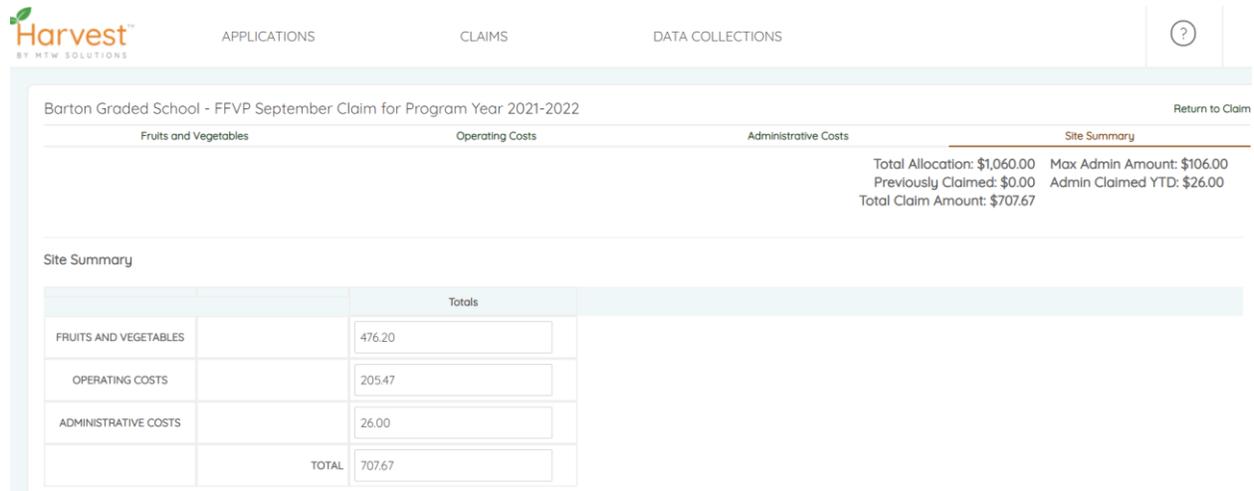
Operating Costs are optional. Labor / Personnel costs should be listed here. Small Supplies are also listed here. Please note that if you are requesting reimbursement for dips for vegetables, the dip must be a low-fat dip.

Administrative Costs Page

Administrative costs are constrained to be no more than 10 percent of the site allocation. Subsections of Administrative Costs include Personnel Costs, Durable Supplies, and Other Administrative Costs.

Site Summary Page

The following image shows the Site Summary Page. This page lists the costs from each of the 3 previous pages at the Site Level. No updates are performed at this level. After the Site Summary is reviewed, it is recommended to click the Return to Claim link, which is the SFA Level.



Harvest
BY MTW SOLUTIONS

APPLICATIONS CLAIMS DATA COLLECTIONS ?

Barton Graded School - FFVP September Claim for Program Year 2021-2022 Return to Claim

Fruits and Vegetables	Operating Costs	Administrative Costs	Site Summary
			Total Allocation: \$1,060.00 Max Admin Amount: \$106.00 Previously Claimed: \$0.00 Admin Claimed YTD: \$26.00 Total Claim Amount: \$707.67

Site Summary

	Totals
FRUITS AND VEGETABLES	476.20
OPERATING COSTS	205.47
ADMINISTRATIVE COSTS	26.00
TOTAL	707.67

Image 4 – Site Summary Page

Submitting an FFVP Claim

After entering claims for each site in the month for which the claim is being completed (at the SFA level) click on the Claim Acknowledgement and Certification page. This page is at the SFA level and may require clicking 'Return to Claim' in the top right of a site level page. From the Claim Acknowledgement and Certification page, click the checkbox indicating agreement with the terms of the claim submission. The comments/notes field is used to communicate information to the AOE Claim Reviewer.

By clicking 'Accept and Submit', a message box will display requesting you to confirm you wish to submit the claim to the state for review. Upon confirmation, the claim will be routed to AOE for review. The process of submitting the claim is now complete.

Reviewing an FFVP Claim

The Review tab is located on the far right of the screen and the label text is vertical. Upon submission, FFVP claims are reviewed by AOE. If the claim is returned for changes, comments from AOE regarding the reason that the claim cannot be approved and paid will be listed here in the Review tab.

Claims are either approved in their entirety or returned for changes. Comments in the Review tab will detail which items (if any) must be updated before resubmission.

Notifications

The individual who submits the claim for the SFA will receive an email notification confirming submission. Another email will be sent to the submitter at the time the claim is approved, or when the claim is returned for changes.

Accessing Help through Harvest

In the top right of each Harvest page, a question mark indicating 'Application Help' is displayed.

Click on 'Contact Support', which will open a separate browser tab to enter the subject and text of a message to go to AOE. If you encounter an error message, please paste the text of that error message into the body of the message to expedite resolution of the issue you encountered.