

Harvest SNP Claims Entry Training

Agenda

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

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

1. Access Harvest
2. Request Harvest Credentials / Modify Existing Credentials
3. Create / Enter / Submit an SNP Claim
4. Reopen and Revise previously processed claims.
5. 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:

1. Click on the New User link
2. Search for, and select the Organization for which you work
3. Select the role you are requesting (usually Data Entry)
4. Submit your request to AOE for review
5. You will receive an email with a temporary password within 48 hours if your request is approved by AOE
6. Log on with your UserID and temporary password
7. Complete the process of changing your password
8. 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:

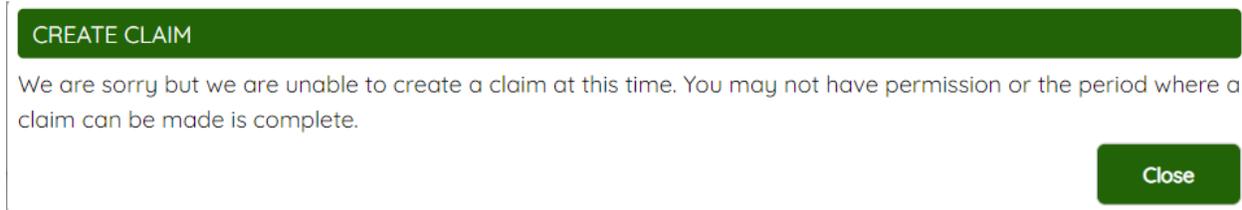


Image 2 – Create Claim Not Allowed Message

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.

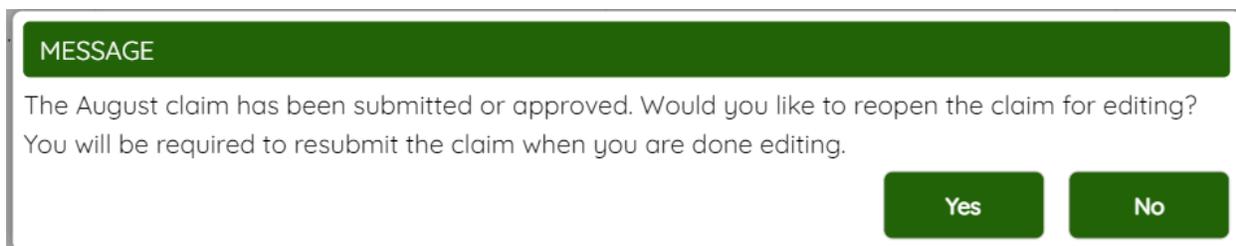


Image 3 – Reopen a Claim

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.

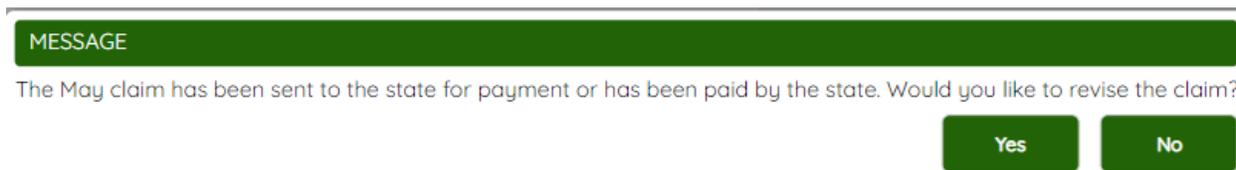


Image 3b – Revise a Claim

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 SNP Claim

SNP Claims are entered at the Site Level. Most SFAs may have approved applications for multiple sites, while others have an approved application for only 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 SFA 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.

Once a site has been accessed in SNP, the only page to be completed is the Site Claim page. Other programs may have multiple pages, but SNP only has the single Site Claim page.

The sections that display on the Site Claim page depend on the programs the site is participating in according to the Application Revision that is approved at the time the SFA Level Claim is created.

If an application revision is needed in order to complete a claim, the SFA can:

1. Delete the entire SFA claim, and start it again after the Application Revision is approved
2. Submit the claim without the content related to the Application Revision. After submission, if the SFA Reopens or Revises the claim, that Reopened/Revised claim will be connected with any newly approved application revisions.

From the Site Claim page, click the “Return to Claim” link in the top right section to return to the Site Listing, where additional sites can be completed until all sites are complete.

The site level pages are not submitted. Rather, the claim is submitted at the SFA level on the Acknowledgement and Certification page.

The following images illustrate sections that may be required to be completed, based on the programs provided by that site.

NSLP Programs (Breakfast, Lunch, Snack)

SNP July Claim for Program Year 2021-2022 Return to Claim

SNP Site Claim Total Meals Served: 393 Total Claim Amount: \$1,114.86

After School Snack Program (Area Eligible)

STUDENT ELIGIBILITY AND ENROLLMENT OPERATIONS

| Total Monthly Attendance | Number of Operating Days | Average Daily Attendance |
|--------------------------|--------------------------|--------------------------|
| 129 | 31 | 5.00 |

| Number of Children Approved for Free Snacks | Number of Enrolled Children |
|---|-----------------------------|
| 12 | 12 |

REIMBURSABLE SNACKS SERVED

| Meals Type | Meals Served | Rate | Amount |
|---------------------|--------------|--------|--------|
| Total Snacks Served | 129 | 1.0000 | 129.00 |

SNACKS NON-REIMBURSABLE

| Second Snacks | Program Adult Snacks | Non Program Adult Snacks | Total Non-Reimbursable Snacks |
|---------------|----------------------|--------------------------|-------------------------------|
| | | | 0 |

Image 4 – NSLP Program Sections

Special Milk Program

- SNP July Claim for Program Year 2021-2022

Return to Claim

| Number of Fluid Milk 1/2 Pints Purchased | | Total Cost of Fluid Milk Purchased | |
|--|--|------------------------------------|--|
| 34916.00 | | 12220.60 | |

| Total Monthly Attendance | Number of Operating Days | Average Daily Attendance |
|--------------------------|--------------------------|--------------------------|
| 4331 | 30 | 145.00 |

| Milk Type | Milks Served | Rate | Amount |
|--------------------|--------------|--------|--------|
| Total Milks Served | 2916 | 0.2200 | 953.04 |

Total Meals Served: 4,332 Total Claim Amount: \$953.04

Image 5 – Special Milk Section

Seamless Summer (SSO)

School - SNP July Claim for Program Year 2021-2022

Return to C

| Meals Type | Meals Served | Rate | Amount |
|---------------------------|--------------|--------|---------|
| Total Free Lunches Served | 446 | 4.3175 | 1925.61 |

| Meals Type | Breakfasts Served | Second Breakfasts Served | Total Breakfasts Served | Rate | Amount |
|------------------------------|-------------------|--------------------------|-------------------------|--------|---------|
| Total Free Breakfasts Served | 523 | | 523 | 2.4625 | 1287.89 |

Image 6 – Seamless Summer Option

Community Eligibility Provision (CEP)

SNP July Claim for Program Year 2021-2022

Return to C

| Total Monthly Attendance | Number of Operating Days | Average Daily Attendance |
|--------------------------|--------------------------|--------------------------|
| 1359 | 21 | 65.00 |

| Number of Children Approved for Free Meals | Number of Children Receiving Paid Meals | Number of Enrolled Children | Total Lunches Served |
|--|---|-----------------------------|----------------------|
| 59 | 13 | 72 | 1359 |

| Meals Type | Meals Served | Rate | Amount | Perf. Based Reimbursement Rate | Perf. Based Reimbursement Amount | Total Amount | CEP Percentages |
|----------------------|--------------|--------|---------|--------------------------------|----------------------------------|--------------|-----------------|
| Free Lunches Served | 1126 | 3.6800 | 4143.68 | 0.0700 | 78.82 | 4222.50 | 82.82 % |
| Paid Lunches Served | 233 | 0.3700 | 86.21 | 0.0700 | 16.31 | 102.52 | 17.18 % |
| Total Lunches Served | 1359 | | | | | 4325.02 | |

Image 7 – Community Eligibility Provision

At the bottom of the Site Claim page, a “Save Page” button will display for users authorized to update claims. Upon clicking Save Page, the page will ensure that all required fields are completed, and any amounts entered are within limits of the approved application revision.

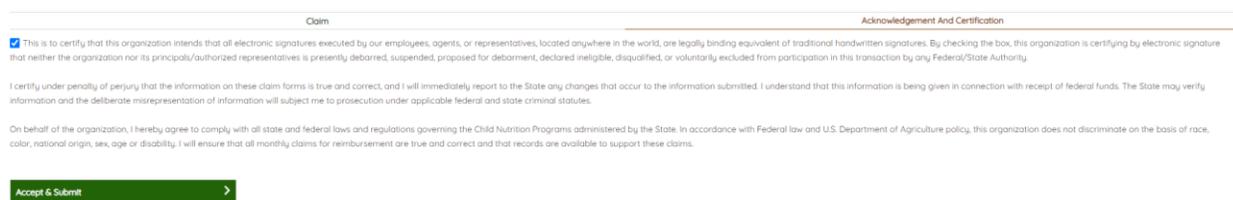
Many fields are automatically calculated based on counts being entered. Tabbing to the next field will result in those calculations being performed. Please do not attempt to enter data into calculated fields.

Any error messages must be resolved, and re-saved, before any data will be saved on the Site Claim page. If you leave the Site Claim page, or timeout without having resolved those errors, the page will not record any updates made since the last successful save.

Submitting an SNP Claim

Once all Sites for the month have been entered and saved, proceed to the Acknowledgement and Certification page. To submit the claim, you must:

1. Check the checkbox agreeing to the certifications.
2. Click the Accept & Submit button.



The screenshot shows a web form with two tabs: "Claim" and "Acknowledgement And Certification". The "Acknowledgement And Certification" tab is active. It contains a checkbox with a blue checkmark, followed by a paragraph of legal text. Below this is another paragraph of text. At the bottom left, there is a green button labeled "Accept & Submit" with a right-pointing arrow.

Image 8 – Submitting a Claim

Notifications

The individual who submits the claim for the SFA will receive an email notification upon approval of the claim.

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.