

## POS CONFIGURATION HOMEWORK 1

This document contains all tasks to be completed for POS Configuration: Homework 1.

### #1 Add Sites

*Navigate to System > Sites & Users > Site Configuration*

- General Info
  - Site Name: Name on reports and SchoolCafé website
  - Site Description: Family Hub – Parents will see this
  - Site Code: Number corresponding to the SIS Site Code
  - Site Type: The Site Type corresponding to your site
  - Reimbursement Claim Export Code: Number used for filing Reimbursement Claim
  - Is Feeding Site: YES = Meals are served at this site
  - Site Category:
    - Select Satellite or Combined Site (if necessary)
      - Review the *Satellite vs. Combined Site Types* document to verify the configuration details
    - Select the Parent site

### #2 Verify Site Types with Grades

*Navigate to System > Sites & Users > Site Configuration > Site Types*

- Default Site Types:
  - Elementary, Middle, High School, Central Office, and Kitchen
- To add additional Site Types
  - Click “New”
  - Enter Site Type Description (name)
  - Select Site Type Groups
    - School Site Types for Grades
  - Select Grades for specified Site Type
  - Click “Save”

### #3 POS Configuration

Navigate to System > Sites & Users > Site Configuration > POS Configuration

*\*This tab allows District Admin to view and edit POS settings for ALL Sites. You can adjust here or on the individual Site page.*

- Principal Account Available on POS
  - An account that pays for a student (paid and reduced eligibility status) that does not have money on their account but receives a meal
- Display message for visiting students
  - Yes (default)
  - No = recommended for Combined Sites
- Deposit Change Due
  - POS will default to deposit any change from a cash purchase into the patron's account
- Allow Charging of Visitors to patron accounts
  - Allow visitors to purchase meals and A la carte items using funds from a student account
- Meal Service Buttons - Student
  - Generic button on POS not tied to an individual account
  - Used to charge a student who has not been imported into SchoolCafé. Eligibility status is paid
- Meal Service Button - Visitor
  - Generic button on POS, not tied to an individual account
  - Used to charge Food Service Staff
- Meal Service Button - Staff
  - Generic button on POS, not tied to an individual account
  - Used for parents and other non-district personnel
- Meal Service Button – Program Adult
  - Generic button on POS, not tied to an individual account
  - Used for non-food service district staff

### #4 Configure Reimbursement Programs

Navigate to System > Management > Program Configuration > Programs

- Select the Academic Year
- Click the right- facing arrow next to a Program for additional information
- Select the Edit Pencil of the desired program
- Click the toggle on or off in the Configured column
- Select the applicable program Classification for each site
- Select the Program Start and End Date for each Site
- Click the toggle on or off to designate as reimbursable
- Click "Save"

### #5 Set Meal Timings

Navigate to System > Management > Program Configuration > Sites

- Select the Site Type and Site from the dropdowns
- Click the Edit Pencil for the desired Meal Type
- Select the Time/Clock icon to update the Start Time and End Time
  - Please note: Meal Timings cannot overlap into multiple Meal Types
- Click "Ok"

*\*Repeat this process for all Site Types.*

### #6 Grace Period (Carryover Eligibility)

Navigate to System > Management > Program Configuration > Carryover Eligibility

- Select the Academic Year and Sites from the dropdowns
- Enter the Start and End Date to set Program Dates
- Click “Set For All Sites” to apply carryover dates

*\*If unique Grace Period dates are necessary for individual sites, click the Edit Pencil to edit the specific dates.*

### #7 Configure Performance-Based Incentive

Navigate to System > Management > Reimbursement Rates > Performance-Based Incentives

- Click “New” to add a new record
- Enter the Starting and Ending Month
- Enter the Additional Rate
- Click “Save”

### #8 Configure Special Assistance Program (CEP and Provision II)

System > Configuration > Special Assistance Programs

- Click “Add”
- Select CEP or Provision II
- Enter all information for each tab (Program Type, Eligibility Percentages, Claiming Percentages, Select Base Year)
- After each tab is completed, click “Next” to view the next tab

*\*For step-by-step instructions, reach out to your Project Mentor for additional guides.*

### #9 Add Labor Hours and Meal Equivalents

Accountability > Labor Hours

Adding Labor Hours and Equivalents can be done as needed. Contact your Project Mentor to set this up.

### #10 Enter Attendance Factors

Navigate to Accountability > Attendance

- Select the Academic Year and Site
- Choose the Monthly or Daily Entry Type
- Click “Apply”
- Enter the Attendance Factor for each site
  - Enter both the ADA and AF if using Bulk Update
- Click “Save”

### #11 Create Admin Users

Navigate to System > Sites & Users > Users

*\*User credentials will need to be created for all staff who need access to School Cafe (IT, Managers, Cashiers).*

- Click “New”
- Enter Contact Info
  - Enter a Username, First Name, Last Name, and Email
  - A temporary password will be sent to the email provided, prompting the user to finish setting up their account. This link will expire
- Enter Organization & Permissions
  - Select the Sites the user will need access to
  - Select the Role permissions needed
- Click “Save”