



## 9.8 Release Notes



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## Front Office

### Accountability

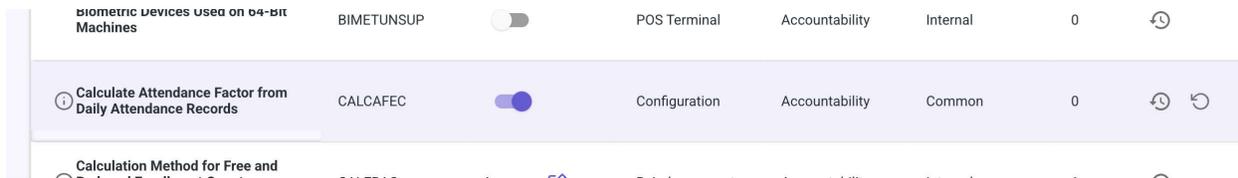
- **Attendance Integrations**

A new setting has been added to allow users to determine whether daily attendance counts will be utilized in Edit Checks, reporting, and other areas.

- **Calculate Attendance Factor from Daily Attendance Records**

When this setting is off, the system will utilize the entered Attendance Factors and Average Daily Attendance (ADA) by month. This is the default selection.

When enabled, the system will utilize the entered Daily Attendance counts and calculate the Attendance Factor per day and the Average by month based on these counts. This option will also make the checkbox available to utilize attendance counts in various reports, as well as add additional Edit Check functionality and an end of day task.



### Monthly and Daily

You can now track attendance for Edit Checks and reporting.

There are two modes of attendance tracking available. Monthly allows tracking a count across a whole month. This is useful for those who only need to track things at the end of the month. Using the Daily option will ensure the most accurate results in Edit Checks and ADA/ADP reporting.

### Bulk Update

The bulk update box allows users to quickly apply an ADA (Average Daily Attendance) and/or an AF (Attendance Factor) across all months simultaneously. This will provide a quick way to input data for comparison against the ADA/ADP Report.

### Other Tools

- Unsaved Change Indicator – Red dot in the grid to indicate an unsaved change is present
- Highlight Missing Counts checkbox – For users who commonly work in a larger picture mode, this function has been added to draw attention to blank values
- Export – This will export grid data with the applied filters
- Include Weekends checkbox – This shows/hides weekend fields (Appears for Daily only)

Accountability  
**Attendance**

Academic Year \*  
2025 - 2026

SNP    SFSP    CACFP

Site Code/Site Name  
162 - Texas ISD Elementary

Entry Type  
 Monthly     Daily

Date  
Last Week

RESET    APPLY

Daily SNP Attendance Entry For 12/28/2025 - 01/03/2026

Highlight Missing Counts     Include Weekends    

| Site  | 12/29<br>Mon | 12/30<br>Tue | 12/31<br>Wed | 01/01<br>Thu | 01/02<br>Fri |
|---|--------------|--------------|--------------|--------------|--------------|
| <input checked="" type="radio"/> 162 - Texas ISD Elementary |              |              | 333          | 399          | 398          |

CANCEL    SAVE

## Edit Check Reports

For both reports, when the setting is enabled, the 'User Attendance counts' checkbox will be displayed and checked by default.

### Edit Check Report

When the checkbox to 'Use Attendance counts' is checked, the Edit Check Report will calculate the Attendance Factor based on the average of the selected days for the report.

Accountability > Reports ← BACK

### Edit Check Report

Site Type: Elementary School  +9

Site Code/Site Name: 382-123SP  +136

Programs: SNP

Meal Type: Breakfast  +2

Show Meals at: Serving Site

Date: Today

Report Type:  Edit Check  Edit Check Worksheet

Report Options:  Summary  Detailed

Additional Options:  Exceptions Only  Exclude Non-Serving Days  Highlight Reverse Edit Checks

Use Attendance counts

### Edit Check Worksheet

When the checkbox to 'Use Attendance counts' is checked, the Edit Check Worksheet will display three new columns (Attendance, Eligible Count, and Calculated Attendance Factor) as well as two new rows per meal type for Average and Sub Totals. The report will also calculate the Attendance Factor utilizing the entered data on the Attendance page for the Daily entry method.

When generated for multiple days, the overall Attendance Factor will be the average of calculated Attendance Factors per day across serving days.

| File Home View   |             |             |               |                  |           |               |                     |          |               |                                      |             |   |              |          |
|--|-------------|-------------|---------------|------------------|-----------|---------------|---------------------|----------|---------------|--------------------------------------|-------------|---|--------------|----------|
| ↳ Export ▾   |             |             |               |                  |           |               |                     |          |               |                                      |             |   |              |          |
| Edit Check Work Sheet <span style="float: right;">Texas ISD</span>     |             |             |               |                  |           |               |                     |          |               |                                      |             |   |              |          |
| Site: 162 - Texas ISD Elementary; Date: 1/5/2026; Report Type: Summary |             |             |               |                  |           |               |                     |          |               |                                      |             |   |              |          |
| Site :<br>Texas ISD Elementary   |             |             |               | Month<br>January |           |               | Operating Days<br>1 |          |               | Attendance<br>Factor (A/F)<br>95.01% |             |   |              |          |
| Day of Month   | Atten       | Elig        | AF            | Free             |           |               | Reduced             |          |               | Paid                                 |             |   | Total Served | Comments |
|  |             |             |               | Served           | Eligible  | Eligible X AF | Served              | Eligible | Eligible X AF | Served                               | Eligible    | Eligible X AF   |              |          |
| <b>Breakfast</b>   |             |             |               |                  |           |               |                     |          |               |                                      |             | Claiming Percentage<br>F/R/P:<br>59.23888%/1.55<br>892%/39.20220% |              |          |
| 01/05/2026   | 400         | 421         | 95.01%        | 0                | 30        | 29            | 0                   | 1        | 1             | 0                                    | 390         | 371   | 0            |          |
| <b>Average</b>   | <b>0</b>    | <b>0</b>    | <b>0.00%</b>  | <b>0</b>         | <b>30</b> | <b>29</b>     | <b>0</b>            | <b>1</b> | <b>1</b>      | <b>0</b>                             | <b>390</b>  | <b>371</b>  | <b>0</b>     |          |
| <b>Sub Total</b>   | <b>400</b>  | <b>421</b>  |               | <b>0</b>         | <b>30</b> | <b>29</b>     | <b>0</b>            | <b>1</b> | <b>1</b>      | <b>0</b>                             | <b>390</b>  | <b>371</b>  | <b>0</b>     |          |
| <b>Lunch</b>   |             |             |               |                  |           |               |                     |          |               |                                      |             | Claiming Percentage<br>F/R/P:<br>8.71143%/1.996<br>37%/89.29220%  |              |          |
| 01/05/2026   | 400         | 421         | 95.01%        | 32               | 30        | 29            | 7                   | 1        | 1             | 329                                  | 390         | 371   | 368          |          |
| <b>Average</b>   | <b>400</b>  | <b>421</b>  | <b>95.01%</b> | <b>32</b>        | <b>30</b> | <b>29</b>     | <b>7</b>            | <b>1</b> | <b>1</b>      | <b>329</b>                           | <b>390</b>  | <b>371</b>  | <b>368</b>   |          |
| <b>Sub Total</b>   | <b>400</b>  | <b>421</b>  |               | <b>32</b>        | <b>30</b> | <b>29</b>     | <b>7</b>            | <b>1</b> | <b>1</b>      | <b>329</b>                           | <b>390</b>  | <b>371</b>  | <b>368</b>   |          |
| <b>Snack</b>   |             |             |               |                  |           |               |                     |          |               |                                      |             | Claiming Percentage<br>F/R/P:<br>10.52632%/0.00<br>%/89.47368%    |              |          |
| 01/05/2026   | 400         | 421         | 95.01%        | 0                | 30        | 29            | 0                   | 1        | 1             | 0                                    | 390         | 371   | 0            |          |
| <b>Average</b>   | <b>0</b>    | <b>0</b>    | <b>0.00%</b>  | <b>0</b>         | <b>30</b> | <b>29</b>     | <b>0</b>            | <b>1</b> | <b>1</b>      | <b>0</b>                             | <b>390</b>  | <b>371</b>  | <b>0</b>     |          |
| <b>Sub Total</b>   | <b>400</b>  | <b>421</b>  |               | <b>0</b>         | <b>30</b> | <b>29</b>     | <b>0</b>            | <b>1</b> | <b>1</b>      | <b>0</b>                             | <b>390</b>  | <b>371</b>  | <b>0</b>     |          |
| <b>Site Total</b>  | <b>1200</b> | <b>1263</b> |               | <b>32</b>        | <b>90</b> | <b>86</b>     | <b>7</b>            | <b>3</b> | <b>3</b>      | <b>329</b>                           | <b>1170</b> | <b>1112</b>   | <b>368</b>   |          |
| <b>Grand Total</b>   | <b>1200</b> | <b>1263</b> |               | <b>32</b>        | <b>90</b> | <b>86</b>     | <b>7</b>            | <b>3</b> | <b>3</b>      | <b>329</b>                           | <b>1170</b> | <b>1112</b>   | <b>368</b>   |          |

## Edit Checks

When the setting is enabled for Attendance entry, the Edit Checks feature will add a new check to indicate when the entered attendance exceeds the enrolled student count per site. The Edit Check will also be modified when the meal counts exceed the Attendance Factor, using the actual attendance count for the Attendance Factor (Attendance Count/Approved Count = AF converted to a percentage). Users can also resolve the new Edit Check from the Edit Checks page if needed.

|                        |            |       |      |  |                                     |   |
|------------------------|------------|-------|------|--|-------------------------------------|---|
| 163 - Texas Elementary | 10/10/2025 | ALL   | ALL  | <a href="#">Attendance count exceeds approved cou</a>    | <input checked="" type="checkbox"/> |    |
| 163 - Texas Elementary | 10/10/2025 | Lunch | Free | <a href="#">Free - Exceeds approved count. Detailed.</a> |                                     | All Patrons<br>Visiting Patrons   |

## ADA/ADP Report

The ADA/ADP (Average Daily Attendance/Average Daily Participation) Report has been added to the Reports page.

Use this report to view Meal Participation in relation to attendance, an important metric to track for operation efficiency.

File Home View

↳ Export ▾ | << < 1 > >>

### ADA ADP Report Texas ISD

Site: 162 - Texas ISD Elementary; Date: 1/5/2026; Use Attendance Counts for ADP calculations: True;

| Site Name                         | Meal Type | Total Attendance (Serving Days Only) | # of Serving Days 1/5/2026 | Average Daily Attendance | Total Meals Served | Average Meals Served Per Day | Average Daily Participation |
|-----------------------------------|-----------|--------------------------------------|----------------------------|--------------------------|--------------------|------------------------------|-----------------------------|
| <b>162 - Texas ISD Elementary</b> |           |                                      |                            |                          |                    |                              |                             |
|                                   | Breakfast | 400                                  | 0                          | 0                        | 0                  | 0                            | 0.00%                       |
|                                   | Lunch     | 400                                  | 1                          | 400                      | 368                | 368                          | 92.00%                      |
|                                   | Snack     | 400                                  | 0                          | 0                        | 0                  | 0                            | 0.00%                       |

**Report Legend**

**Total Attendance** = Sum of Attendance counts entered for selected date range.  
**Average Daily Attendance** = Total Attendance/Approved divided by # of Serving Days  
**Average Meals Served Per Day** = Total Meals Served divided by # of Serving Days  
**Average Daily Participation** = Average Daily Meals / Average Daily Attendance  
 \* = No records/entries exist for that date.

## End of Day

When the setting is enabled, a new section will be added to the End of Day page for the Attendance Count. This allows users to check if an attendance count has been entered for the day and enter it directly without needing to navigate to the Attendance page.

Accountability **End of Day** REFRESH SETTINGS

Filters

Site Code/Site Name: 162 - Texas ISD Elementary | Date: 01/05/2026 | Status: All RESET APPLY

| Daily Task                              | Summary  | Details   | Status      | Action(s)    |
|---|--|---|-------------|--------------|
| <a href="#">Deposit Slip</a>            | No Deposit Slip Created                                  |   | NOT STARTED | CREATE SLIP  |
| <a href="#">Sessions</a>                | Sessions Reconciled: 1                                   | Total Over/Under: \$0.00<br>Total Transactions: 0       | COMPLETE    | AUTO-RECO... |
| <a href="#">Edit Checks</a>             | No Edit Checks Found                                     |   | COMPLETE    | REVIEW       |
| <a href="#">Serving Exceptions</a>      | 0 Duplicate Meals Found<br>0 Eligibility Variances Found | 0 Duplicate Meals Resolv<br>0 Eligibility Variances Res | COMPLETE    | RESO... ⋮    |
| <a href="#">Marked for Review</a>       | 0 Transactions Marked for Review                         |   |             |              |
| <a href="#">Suspicious Transactions</a> | No Suspicious Transactions Found                         |   | NOT STARTED | REVIEW       |
| <a href="#">Labor Hours</a>             | 00:00 Labor Hours entered                                | 0 of 6 Categories have en                               | NOT STARTED | ENTER LABOR  |
| <a href="#">Attendance Count</a>        | Attendance Recorded: 400                                 |   | COMPLETE    | RECORD       |

4 6

4 out of 6 tasks completed

368 Lunch MEALS More

---

\$0.00 SALES More

---

-- PAYMENTS More

---

**REPORTS**

MENU ITEM SA... PARTICIPATION

MEAL COUNT MORE REP... ▾

Specific Page and Special Configuration Permissions have also been added for this new functionality.

## Page Permissions

GENERAL PERMISSIONS | SPECIAL PERMISSIONS | USERS

Role: Cafeteria Manager | Description: Cafeteria Manager 17/250

| Resource                   | Resource Type | FULL                                | VIEW                                | EDIT                                | ADD                                 | DELETE                              |
|----------------------------|---------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| ADA ADP Report             |               | <input checked="" type="checkbox"/> |
| Add Menu Grid              | Page          | <input type="checkbox"/>            |
| After School Snack Program | Page          | <input type="checkbox"/>            |
| Attendance                 | Page          | <input type="checkbox"/>            |
| Cash Collection Report     | Page          | <input checked="" type="checkbox"/> |

## Special Permissions

| Permission   | Description  | Action                   |
|--|--|--------------------------|
| > Account Management   |  |                          |
| <ul style="list-style-type: none"> <li>Accountability</li> </ul> |  |                          |
| Adjust Session Beyond Max Amount                                 | Allows user with to adjust a session beyond the value set for setting "Reconciliation - Maximum Over/Under..." | <input type="checkbox"/> |
| Attendance - Configuration Options                               | Attendance - Configuration Options   | <input type="checkbox"/> |

### *Accountability > Attendance*

- **Override Options for Special Provision Programs**

We have added an override while configuring P2/CEP Programs to allow the claiming percentages to be entered manually. This is intended to help with scenarios where the Identified Student Analysis calculations do not match the claiming percentages approved by state teams.

We have also expanded the number of decimal places to 5, allowing Provision 2 to run to 4 decimals and future-proofing any changes for CEP. We have also seen some states approving CEP percentages to 4 decimals.

### *System > Configuration > Special Assistance Programs*

**Back Office**

**Inventory**

- **Internal Vendor Contract Updates**

The Contracts section for Internal Vendors has several new features to support more complexity in your operations.

First, this section now supports the creation of **Seasonal Contracts**. These seasonal contracts are an extension of the main contract, utilizing the same item list, but they allow for different configurations during a specified date range. For example, during the summer, distribution sites may have a modified shipping schedule or more simplified delivery routes. Seasonal Contracts allow for this complexity without disrupting the overall distribution process.

Furthermore, internal vendor contracts have also been updated with five new **Distribution Settings**. These settings control several important operational details that affect the distribution site as well as the ordering sites. The **Available Quantity** settings determine which values sites will see for the available quantities when ordering from the distribution site, as well as whether they can exceed that quantity. The **Substitution** related settings determine which types of items can be added to distributions. Lastly, the **Allow Orders After Assignment** setting determines when sites are cut off from ordering for a particular distribution day.

*Inventory > Management > (Internal) Vendors > Vendor Detail > Contracts tab*

Inventory > Management  
**Vendor - SCBO Warehouse**

VENDOR    CONTRACTS    ITEMS    ORDERING CONDITIONS

Vendor Contracts + ADD CONTRACT

| Contract Name  | Active Date             | Shipping Groups                    | Delivery Groups                    | Shipping Schedule  | Action   |
|--|-------------------------|------------------------------------|------------------------------------|--|--|
| <div style="display: flex; justify-content: space-between;"> <span>Main</span> <span style="background-color: #28a745; color: white; padding: 2px;">ACTIVE</span> </div>           | 06/25/2025 - 12/31/9999 | <a href="#">Cold, Dry, Default</a> | <a href="#">Default, North, +3</a> | <div style="display: flex; gap: 5px;"> <span>Mon</span><span>Tue</span><span>Wed</span><span>Thu</span><span>Fri</span><span>Sat</span><span>Sun</span> </div> | <div style="display: flex; gap: 10px;"> <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">2</span> <span>⚙️</span> <span>✎</span> <span>🔄</span> </div> |
| <div style="display: flex; justify-content: space-between;"> <span>Receipt Item Price</span> <span>Min/Max Purchase</span> </div>  |                         | Display QOH to Sites               | Source of Subs                     | Manual Additions   | Orders after Assignment  |
| <div style="display: flex; justify-content: space-between;"> <span>Batch Price</span> <span>--</span> </div>   |                         | Projected QOH                      | Site Perpetual                     | Not Allowed  | Prompt Each Time   |
| <div style="display: flex; justify-content: space-between;"> <span>Jan Seasonal</span> <span style="background-color: #28a745; color: white; padding: 2px;">SEASONAL</span> </div> | 01/12/2026 - 01/23/2026 | <a href="#">Default</a>            | <a href="#">Default, +1</a>        | <div style="display: flex; gap: 5px;"> <span>Mon</span><span>Tue</span><span>Wed</span><span>Thu</span><span>Fri</span><span>Sat</span><span>Sun</span> </div> | <div style="display: flex; gap: 10px;"> <span>⚙️</span> <span>✎</span> <span>🔄</span> </div>   |
| <div style="display: flex; justify-content: space-between;"> <span>Receipt Item Price</span> <span>Min/Max Purchase</span> </div>  |                         | Display QOH to Sites               | Source of Subs                     | Manual Additions   | Orders after Assignment  |
| <div style="display: flex; justify-content: space-between;"> <span>Batch Price</span> <span>--</span> </div>   |                         | Actual QOH                         | Site Perpetual                     | Allowed  | Disallow orders after Assign...  |

< BACK TO VENDORS SCREEN

- **Hotshot Distributions**

In addition to the expanded configurations, Distribution also features a new functionality. **Hotshot Distributions** is a new option on the calendar for Distribution site personnel. While traditional distributions are simply used to fulfill quantities derived from site orders, Hotshots enable a completely manual distribution process. When creating a Hotshot, both the sites and items will be manually added by the distribution site. Once the Picking status is reached, the distribution process is identical to regular distributions.

Hotshots are differentiated on the calendar by a special Truck icon. We hope this feature enables and supports the flexibility your operations demand.

*Inventory > Distribution*

### Distribution Calendar

Choose a Site  
1212 - SCBO Warehouse

< **January 2026** >

HOTSHOT DISTRIBUTION
 REFRESH

Unassigned
 Assigned
 Picking
 Shipping

| Sun | Mon | Tue | Wed | Thu                                       | Fri  | Sat |
|-----|-----|-----|-----|---|--|-----|
| 28  | 29  | 30  | 31  | 1   |  |     |
| 4   | 5   | 6   | 7   | 8   | 9  | 10  |
|     |     |     |     | 1 route (3 stops)<br>Shipping In Progress | 4 routes (8 stops)<br>Shipping In Progress |     |

Hotshot Date

01/15/2026

START HOTSHOT

**Insights**

- **Insights Benchmark Configuration Updates**

Insights users can now streamline benchmark configuration with the following enhancements:

- Site Type filtering for the sites grid
- Viewing previous year's actual values next to KPI benchmark values
- Auto-filling KPI values from previous year's values
- Bulk updating KPI values incrementally instead of doing one by one
- Viewing the History of benchmark changes

*Insights > Benchmark Configuration*