

2011-2012 Start of Year Checklist

NOTE: Please check the Systems Design website support page to see if a newer version of this document is available. (<http://www.systemsdesignusa.com/SDsite/manuals.html>) The version number is in the top right corner of this page.

NOTE: ON THE DAY WE DO YOUR ROLLOVER, THERE CAN BE NO CASH TRANSACTIONS POSTED. WE WRITE OUT A BALANCE FORWARD TRANSACTION TO THE CASH FILE. ANY CASH POSTED THAT DAY WOULD BE INCLUDED IN THE BALANCE FORWARD CAUSING A DOUBLING EFFECT.

1. In order for Systems Design to remove the appropriate students it is necessary that the update from your PEIMS database be performed. Please notify Systems Design when your District has completed the PEIMS [student database such as SASI, RSCCC, EDP] rollover so we may proceed with the End of Year process for your system.

If you do not have an automated Demographic Transfer and Update, it will be necessary for you to obtain the appropriate database export and notify Systems Design when it is available. This file must be the same layout used in previous years. Any changes to this layout will require Systems Design to modify the database import and will further delay your system's readiness for the new school year.

If you have an automated Demographic Transfer then the students will be updated the next time your automated update is scheduled, and the Demographic Update Log Report will print to your printer. Notify Systems Design that your district's PEIMS update has been processed and that you are ready for the End of Year process to be performed.

During the End of Year process the standard procedure is for inactive students and students who have graduated to be removed from the system if certain conditions are met. These conditions are:

1. The account balance must be zero.
2. The student's status is not free or reduced.

In the event there is a delay of the PEIMS rollover and the End of Year process must be performed **BEFORE** you begin entering Lunch Applications for the 2008-2009 school year, please contact Systems Design to discuss your options. Two options are:

- a. Systems Design can manually promote your students and perform the End of Year process.
- b. Systems Design can perform the End of Year process leaving the student records as they are and allow them to be updated when the PEIMS rollover has been completed.

4/12/2011

2. If you are using Direct Certification from the CNPIMS website and you would like us to process your file during the End-of-Year Rollover, you will need to download the file and have it ready to process. Please visit our support page at <http://www.systemsdesignusa.com/SDsite/manuals/manuals.html>.
 - a. In the Software Downloads section you need to download [Direct Certification FTP Setup Instructions](#) and follow these instructions to install the [Direct Certification FTP Setup Program](#).
 - b. After installing the program, please follow the instructions in the Procedures Direction [Direct Certification Update](#) to download your update from CNPIMS. We suggest you save the file as C:\DC\DIRCERT.Q1.
 - c. Next upload the CNPIMS file to your server by double-clicking on the FTP Direct Cert icon on your desktop and follow the on-screen instructions.
3. Districts using Systems Design's Lunch Application system are responsible for verifying the Free and Reduced Income Eligibility Ranges for the new school year. You may use option SM-08, specify your district number (usually "01") and select option 07 (LUNCH APPL RATE TABLE).

You will need to verify each Period Code (Annual, Monthly, ...) against the tables published for the 2011-2012 year. You should only need to verify the tables, since an automatic update of the income eligibility ranges is performed during the year-end rollover process. If you find any errors, please contact Systems Design immediately.

NOTE: *The year-end rollover process must be completed and these rates must be updated and verified before you can start loading any new applications.*

4. **All districts are responsible for verifying** the State Reimbursement Rates to ensure they are properly set for each district (usually only "01"). Use option FS-01-05 (District Static Info Maint.) to verify these rates. Use option 1-Maintenance and C-change. The rates are recorded in fields 06-13 and 17-22.

Fields 06-08 are the Lunch reimbursement rates. Fields 09-11 are the Breakfast reimbursement rates. Fields 12-13 are the Severe Need Reimbursement rates. Fields 17-19 are the Reduced and Free After School Snacks reimbursement rates. Fields 20-22 are the Summer Food Service Program reimbursement rates.

5. If you are using Systems Design's Lunch Application system, you will need to reset your Application Number. You may use option SM-08, specify your district number (usually "01") and select option 02 (DISTRICT RECORD). Field 09 (LUNCH APPL NO) contains the last application number. This should be set to 11000000.
6. If you are changing any menu prices, you may change them through FS-01-02 (MEAL MENU MAINTENANCE). Please print and verify the changes using option FS-04-14 (School Menu Listings).
7. You will need to verify that your Off-Campus Meal Prices are properly set for each campus. You may use option FS-01-03 (SCHOOL MASTER MAINTENANCE) for these changes. The prices are stored in fields 13 through 16. Change the reimbursable breakfast and lunch prices if your reimbursable meal prices change so the off campus price will be the same as the on campus price charged.

Using FS2000 Lunch Applications in 2011-2012

1. Please mark you calendar for the following dates:
 - Ten day expiration letters need to be printed and mailed
 - Expire temporary accounts.

2. Notification of Temporary Status Expiration Letter

Ten days prior the expiration date you need to print your Temporary Status Expiration letters.
Go to:

LA =LUNCH APPLICATION
03 = UPDATE TEMPORARY STATUS MENU
02 = EXPIRATION LETTERS for ROLLED OVER STATUSES EXPIRING

It will ask you for an APPLICATION DATE LIMIT. Use the last day of school last year. This step creates a letter for last year's applicants that have not reapplied and for any prior year direct certified or converted free or reduced students without an application.

3. On the last day of the thirty-day grace period you will need to expire the students after running the Food Service End-of-Day procedures. On the Expiration Date – After you have run your Food Service End of Day procedures on the last day of the 30 day grace period then you need to go to:

LA =LUNCH APPLICATION
03 = UPDATE TEMPORARY STATUS MENU
14 = UPDATE FILES for APPLICATION STATUS UPDATE

This will change only the applications that are temporary with a temporary date that has expired.

4. Direct Certified and Converted Accounts from the previous year that have not been certified this year and did not turn in an application need to be expired. Go to:

FS = FOOD SERVICE
01 = MASTERFILE MAINTENANCE MENU
15 = UPDATE FILES for PROCESS STUDENT-NO CUR YR APPL

This will change all expired Free and Reduced students to Paid. Be sure to use the last day of school last year when it asks for the Date Limit.