**CDE OSN’s New Claim System – Instructions for Applying**

**Passwords**

* Current claim system users will be able to use their current usernames and passwords to access the new claim system. Then the system will likely ask you to change the password.
* Please note: In the new system, passwords still expire every 60 days, and the password requirements are as follows: minimum of 8 characters, at least one number, at least one special character.

**Sponsor Application**

* Go to Applications
* Application Packet
* *If* school years come up, click on the current school year (with the green New button)
* Click on the red Enroll button; “Do you want to continue?” will come up—click Okay
* There will be a red arrow next to the sponsor app; to the left of this, click on Modify
* Fill out the sponsor application, answering all questions. Below is an explanation of some of the questions on which you may need more information.
	+ Operating dates should default to the current year; do not change these
	+ The contact information was pre-populated from the previous claim system; you will likely need to change the superintendent section and make sure that your usual two contacts for the claim system are under Child Nutrition Director and Claim Preparer. (Who you list and in what field is up to you.) Ensure that the pre-populated information is correct (e.g., title, email, phone number).
	+ Address—be sure to fill in the county; otherwise, an error will pop up saying the address needs to be entered.
	+ Hearing Official question—please also refer to the F&R Policy Statement that is in the system as a required document to be completed (under Checklist).
	+ Counting and claiming procedures question—please also refer to the Distribution, Collection, and Coding Form that is in the system as a required document to be completed (under Checklist).
	+ Severe Need (SN) Lunch is calculated within the system; it will tell you whether your district is eligible for SN. Nothing should need to be entered here. SN is based on lunch data from two years prior—if the district as a whole served more than 60% of its lunches to F&R students, then the district receives a higher reimbursement rate. (Refer to current year reimbursement rates.)
	+ Read the Certification Statement. Click the box next to this, which will indicate that you agree to this certification.
	+ Click the red Save button. If there are errors, the system will identify them and give you the ability to make revisions. Be sure to pay close attention to the nature of the error; some errors will allow you to click Finish and come back to the application later (any data entered will be saved), while other errors require immediate attention, as the data entered will not be saved.
	+ Once you have entered the application with no errors, on the Application Packet screen, there will be a green checkmark next to Sponsor Application.

**Site Applications**

* Starting at Application Packet (see instructions above for how to get there), under Site Applications, click on School Nutrition Program. (If you need to apply for the Seamless Summer Program, please contact our office.)
* Your schools should be listed here. If any are missing, you may need to go to Add Site. If the schools are not listed on this Available Sites screen, or if they need name/code changes, please contact Jennifer at otey\_j@cde.state.co.us.
* Click on Modify to fill out your site applications.
	+ Program Information—Click on Modify Program Selection to choose the programs in which the school participates.
		- ACSP Note: If you will be applying for Snack later but not right now, do not mark that a school is participating in ACSP. You will need to reapply (and fill in just the ACSP information & forms) once you are ready to add Snack.
	+ Participation Information—This will show whether the school is eligible for Severe Need (SN) breakfast. This data is calculated from within the system, so nothing should need to be entered here. SN breakfast is based on lunch data from two years prior—if the school served more than 40% of its lunches to F&R students, then the school receives a higher reimbursement rate. (Refer to current year reimbursement rates.)
	+ Pricing Information—This needs to be filled out only once for each different pricing structure (i.e., if you have multiple schools charging the same price, you have the ability to copy this information from a site you already entered).
		- Please note that the reduced breakfast box will not allow anything to be entered, as the charge for reduced breakfast is $0.
	+ Provisional Option Request—For most schools, this should be “Not Participating.” No schools in CO are currently on Provisions 1 or 3. Provision 2 is an option whereby districts take applications one year; establish percentages of free, reduced, and paid; and then apply these percentages to meals served during three subsequent years in order to determine meal counts by type for the reimbursement claim. In this option, meals are served free of charge to all students.
	+ Read the Certification Statement. Click the box next to this, which will indicate that you agree to this certification.
	+ Click the red Save button. If there are errors, the system will identify them and give you the ability to make revisions. Be sure to pay close attention to the nature of the error; some errors will allow you to click Finish and come back to the application later (any data entered will be saved), while other errors require immediate attention, as the data entered will not be saved.
	+ Once you have entered the application with no errors, on the Site List screen, there will be a green checkmark next to the name of the school.
	+ Repeat this process for each school participating this year.

**Checklist Summary (for required forms)**

*\*\*Please note: Some of these forms require signatures, so most districts will need to print them, have them signed, and scan them back into the computer in order for them to be uploaded into the system. Only if you do not have a scanner, please fax the forms to 303-866-6133 and send an email to* *otey\_j@cde.state.co.us* *with a note that the fax has been sent. CDE will then scan the forms into the system for you within 3 business days.*

* For more detailed assistance with uploading these forms, please see the How-to Steps to Upload Forms in the System, posted at <http://www.cde.state.co.us/cdenutritran/nutriprogramrenewal.htm>.
* Go back to the Application Packet. There is a red arrow next to Checklist Summary. Click on Details, just to the left of the arrow.
* Click on the name of your district.
* There are 5 forms that all SFAs will need to submit. For SFAs with the Afterschool Care Snack Program, there are an additional two forms.
* In this section, you will need to download the forms to your computer by clicking on the name of the form and saving it to your computer.
* Then, you can print the form, obtain the required signatures, scan the form to yourself (be sure to include the entirety of the form, not just the page you filled out/signed), and save it to your computer.
* To upload back into the system the forms you have completed and have saved on your computer, click on the blue paperclip. Be sure you upload the correct form under the correlating heading. For example, to upload the Permanent Agreement, click on the blue paperclip next to Permanent Agreement.
* Click on Browse by File to Upload.
* Find the appropriate file that you have saved on your computer. Click Open.
* If you have any comments, please include them in the box. Click Save and then Finish.
* The document will appear at the bottom of the screen under Checklist Item.
* Complete this process for all documents. Each time you are uploading a form, be sure you are starting this process from the blue paperclip screen.
* After you have uploaded all of the forms, next to the name of the forms by the blue paperclip, click on the boxes under Document Submitted to CDE. Dates will populate.
* Click Save and then Finish.
* Back on the Application Packet screen, a green checkmark will appear by the checklist summary.

**Submitting the Application to CDE**

* Once you have completed the sponsor application, all site applications, and all forms, on the Application Packet screen, click on the red Submit for Approval button. Click Okay.
* In big red letters, the following message will appear: The Application Packet is currently under review by the State and is unavailable for changes.
* If corrections need to be made, the packet will be returned to the SFA in the claim system, along with comments (at the bottom of the sponsor and/or site application) on what needs to be corrected.
	+ For help on making corrections, please see the Steps for Revising Online Applications at <http://www.cde.state.co.us/cdenutritran/nutriprogramrenewal.htm>.
	+ Please keep an eye out on your email (including junk mail, just in case) for communication from the system. You can also go to the system to check the application status at any time.
* Please allow for 2-3 weeks (from the time all requirements are completed) for CDE to approve your applications/forms.
* Once the application is approved, be sure to check the Comments to Sponsor box at the end of the sponsor application, in case CDE includes any comments for you to note.

**Miscellaneous**

* To navigate around the system, you can use the Back buttons or use the blue tabs at the top of the screen to go to different pages.
* “Session conflicts”—Sometimes, if you go back to the system without having closed it out completely, a Session conflict message will pop up. Click on Activate to log back in.