Start of Year Checklist
For Free and Reduced-Price Software Systems

Start your school year out right! Use this resource annually to ensure your free and reduced-price software system is operating compliantly.

Application Approval
☐ Income eligibility guidelines are updated to the most recent guidelines published by School Nutrition Unit
☐ Income is calculated correctly (annualized when frequencies differ)
☐ Ability to select correct frequency (weekly, bi-weekly, 2x/month, monthly and annual)
☐ Ensure other source categorical applications (migrant, runaway, head start, foster, homeless) are not automatically approved
☐ Ability to add additional students to, and amend, existing applications
☐ Differentiates case number applications vs. direct certification status

Direct Certification
☐ Ability to categorize the qualify type of direct certification (SNAP, TANF, migrant, foster, head start, runaway, homeless)
☐ Ability to differentiate extended eligible students vs. directly certified student
☐ Direct certification with SNAP remains precedent even if household submits an application
☐ Extended eligibility is properly documented (date, method and original directly certified student)

Notification Letters
☐ All templates generated by software system are compliant. May include:
  ○ Information Letter to Households
  ○ Eligibility Letters
  ○ Verification Notification/Results Letter

Online Applications
☐ Ensure online applications only accept valid case numbers and/or are queued for manual approval.
☐ Ensure the information letter to household, use of information and non-discrimination statement are accessible within the electronic version
☐ Meet all application requirements, including obtaining electronic signature

Carryover
☐ Ensure students have rolled over into new school year correctly
☐ Carryover date is 30 operating days per site/grade group start dates; Cannot have district-wide drop-off date if sites/grades have different start dates

Approved Online Application Vendors
- PrimeroEdge
- Infinite Campus
- MCS/Heartland
- NutriLink
- PaySchools
- Horizon
- EZMealApps

If your vendor is not listed, School Nutrition Unit will need to approve the online application during the renewal process.

Requirements for Notification Letters:
- Eligibility Manual
-School Nutrition Templates

Application/Online Application Requirements:
- Eligibility Manual

This institution is an equal opportunity provider.