

User Guide

Welcome to Ready Records!

This User Guide will help you get up and running with Ready Records. You will find step-by-step instructions for each part of the process. If you still have questions, please don't hesitate to contact us at info@ready-records.com or 651-433-7346.

Ready? Let's go!

1

CONFIGURE
REMINDERS AND
SET SIGNATURE

2

UPDATE ALL
PARTICIPANT
INFORMATION

3

EMAIL REQUEST
TO PARENT/
GUARDIAN

4

APPROVE
PAPERWORK

5

RUN
REPORTS

Step 1: Configure Reminders and Set Signature



Step 1: Configure Reminders and Set Signature.

Ready Records can automatically send emails to remind parent/guardians that you need their Food Program paperwork. To set up the time intervals for reminders:

- Log in as a sponsor
- Click on Setup
- Scroll down to “Manage Enrollment and income Form Reminder Emails”
- Complete the fields by putting in the number of days prior to form expiration that you want to send a reminder. In the reminder example below, we have the system sending out weekly reminders starting 35 days from when the form expires.

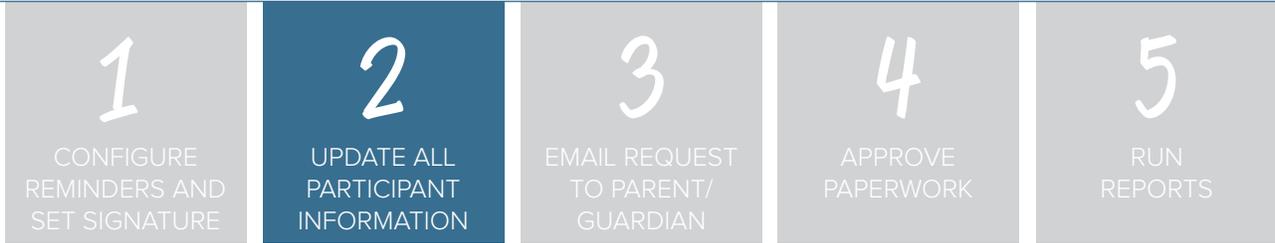
| Manage Enrollment And Income Form Reminder Emails | |
|---|-------------------------------------|
| Enable feature | <input checked="" type="checkbox"/> |
| First Guardian Email Reminder | 35 |
| Second Guardian Email Reminder (days) | 28 |
| Third Guardian Email Reminder (days) | 21 |
| Fourth Guardian Email Reminder (days) | 14 |
| Fifth Guardian Email Reminder (days) | 7 |

A signature is applied to each income and enrollment form that is approved by a sponsor user. To create a signature:

- Login as a sponsor
- Click on “Users”
- Scroll to the signature box
- Use the mouse or touchscreen to add a signature
- Click Save

| | |
|--|--|
| Sign Here: | |
| <input type="button" value="Clear Signature"/> | |

Step 2: Update All Participant Information



Step 2: Update All Participant Information.

Ready Records pulls all of the participant and household information directly from the system. Before requesting paperwork from the parent/guardians, please verify the accuracy of the data in the system for the following information.

- Enter Address, City, State, and ZIP. Then scroll to the bottom of the page and click the green “Save” button before adding a parent/guardian.

Household Info

Address 1: 123 Main Street

Address 2:

City: Minneapolis

State: Minnesota

Zip: 11111

- Parent/Guardian Name, Phone Number and Email Address

Guardian

First Name *: Susan

Middle Name:

Last Name *: Johnson

Primary Phone: (651) 433-7345

Secondary Phone:

Email Address: info@ready-records.com

Primary Guardian for Household

Save

- Children's Names, Birthdates and Start Dates

First Name *: Bethany

Middle Name:

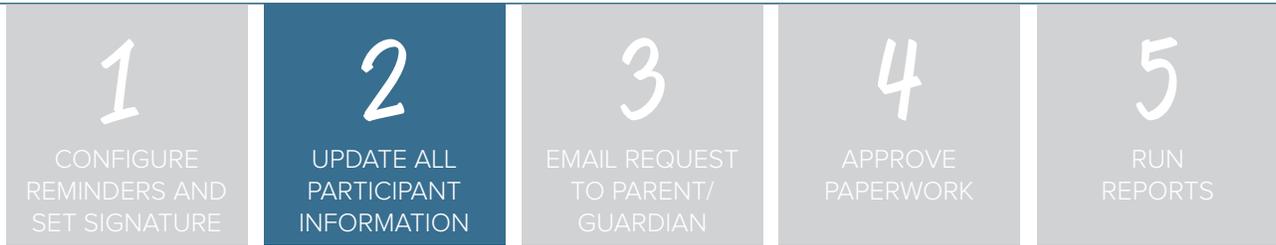
Last Name *: Johnson

Birthdate Estimated:

Birthdate *: 03/03/2009

Start Date *: 06/01/2018

Step 2: Update All Participant Information



- Race and Ethnicity

Racial Identity Black or African American ▼

Ethnicity Hispanic or Latino Not Hispanic or Latino

- Schedules

Participant Schedule [Edit Schedule](#)

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|----------|
| | 07:00 am 04:00 pm | |
| | Breakfast PM Snack Lunch | |

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To add a new participant:

- Click on “Participants & Rosters” on the main dashboard.
- Either create a new household (see separate instructions) or locate the existing household to which you need to add a child (see separate instructions).
- From the Household Info page, click the blue “Add Participant” button.
- Only the following fields are required: please note that ALL other fields are not relevant for Ready Records.
 - **First name (required)**
 - **Last name (required)**
 - **Birthdate (required)**
 - **Start Date (required)**: this is the date that the child should begin being claimed for CACFP meals. All meals prior to this date will be disallowed during claims processing.
 - **Racial Identity (required)**: you should complete this information based off of income or enrollment information if you wish to use My Food Program for tracking race/ethnicity data for reporting purposes.
 - **Ethnicity (required)**: you should complete this information based off of income or enrollment information if you wish to use My Food Program for tracking race/ethnicity data for reporting purposes.
 - **Participant Schedule (required)**: use information from the enrollment form to complete this section. See separate instructions for further explanation of this feature.

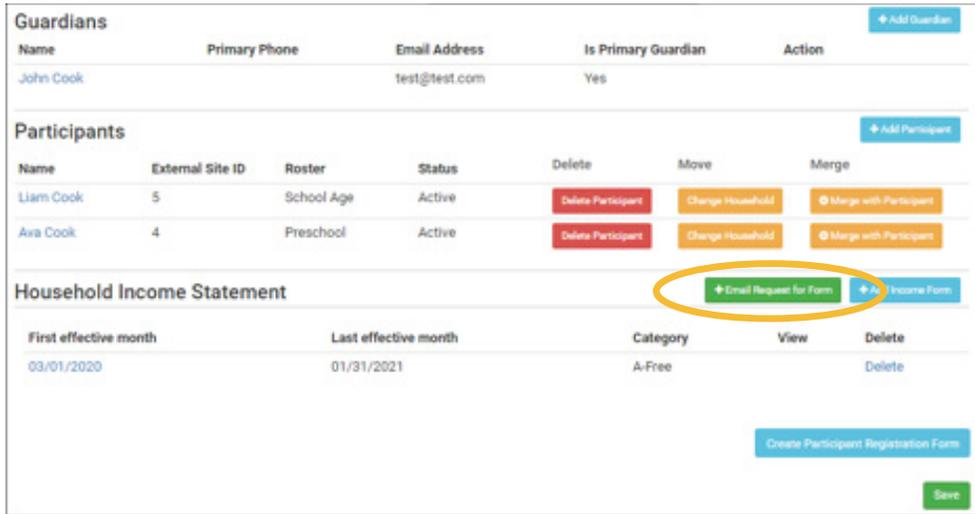
Step 3: Email Request to Parent/Guardian



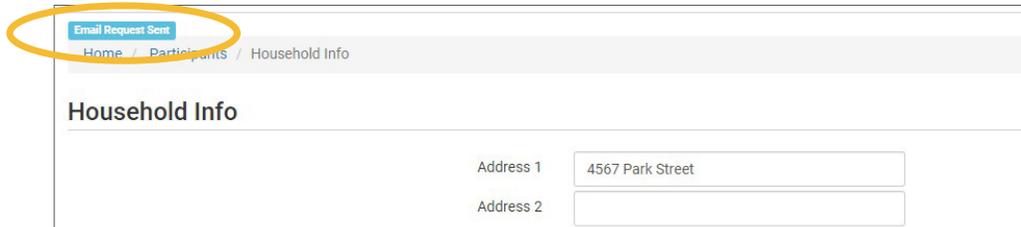
Step 3: Email Request to Parent/Guardian.

To send an email to the parent/guardian requesting that they complete the Food Program paperwork:

- Click on Participants & Rosters
- Click on the name of the Parent/Guardian
- Click on “Email Request for Form”.



- Once you click “Email Request for Form” two things will happen:
 - You will get a confirmation message at the top of the page that says, “Email Request Sent”.



- You will see the request listed under Ready Records Request with the date the request was sent and the email address to which the request was sent.

| Ready Records Requests | |
|------------------------|------------------------|
| Date Sent | Sent to |
| 08/27/2020 | info@ready-records.com |
| 08/26/2020 | info@ready-records.com |
| 08/26/2020 | info@ready-records.com |

Step 3: Email Request to Parent/Guardian

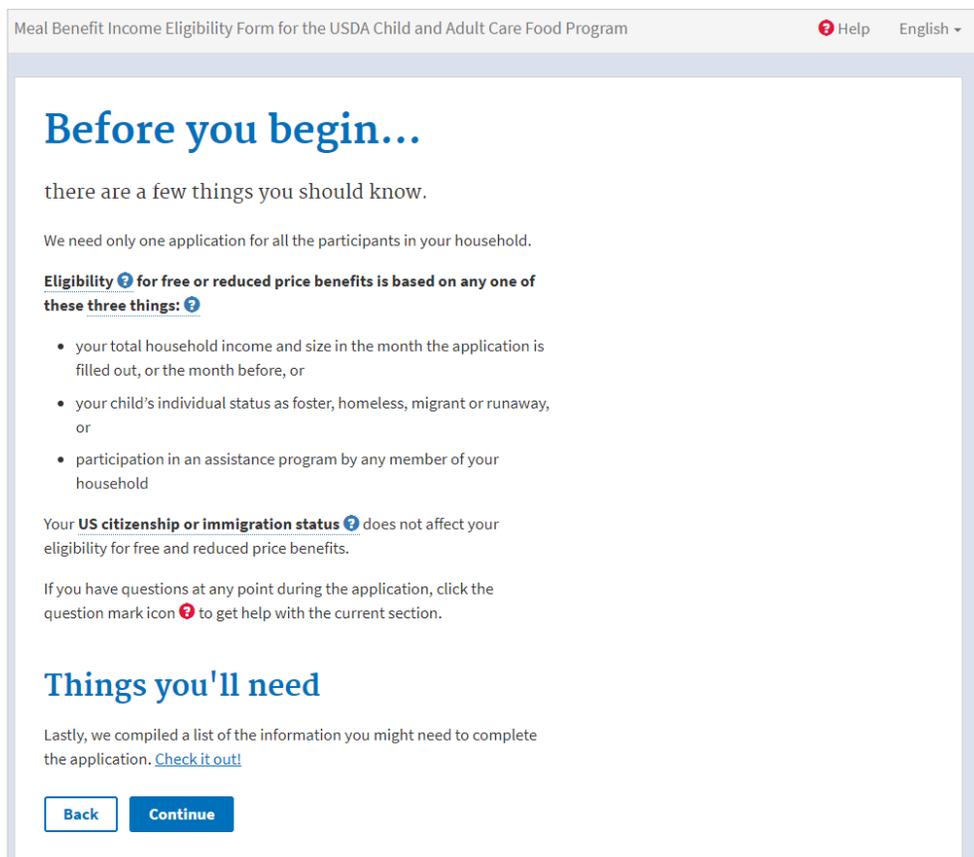


An email will be instantly sent to the parent/guardian email address. Instruct them to look for an email from “noreply@myfoodprogram.com” and click the link. The module will walk the parent/guardian through the process step-by-step.



Primary Guardian Confirms Enrollment

The parent clicks on a unique link within their email and they are taken to the Ready Records web app.



Step 3: Email Request to Parent/Guardian



Primary Guardian Completes Form

The primary guardian completes the Ready Records web form (our web form is based off of the prototype for school meal applications created by USDA with modifications for the CACFP). For household address and phone number and children’s names, dates of birth and typical schedule, the web form is populated with the data from My Food Program and the parent is asked to confirm the information but is not able to edit those fields. This is to create consistency between the income and enrollment forms and the information within the system.

Step 3: Email Request to Parent/Guardian



Primary Guardian Provides Case Number or Income

The parent is then able to provide a case number for qualifying programs.

Meal Benefit Income Eligibility Form for the USDA Child and Adult Care Food Program

Begin — Students — **3 Programs** — Summary

If anyone in your household participates in [SNAP](#), [TANF](#), or [FDPIR](#) then Adrien is automatically eligible for benefits.

A household is defined as a group of people, related or unrelated, that usually live together and share income and expenses.

This includes grandparents or other extended family members that are living with you. It also includes people that are not currently living with you, but are only away on a temporary basis, like kids that are away at college. It includes people regardless of age or whether they earn or receive income.

If you need more detailed information, see the 'WHO SHOULD I INCLUDE IN MY HOUSEHOLD?' question in Help.

If anyone in your household (including you) currently participates in any of the following programs, please select one or more of the check boxes below. If not, press continue.

Supplemental Nutrition Assistance Program (SNAP)

Case number

Temporary Assistance for Needy Families (TANF)

Food Distribution Program on Indian Reservations (FDPIR)

Back Continue

If they do not participate in programs that automatically place them in the A-Free income eligibility category, the primary guardian is offered the opportunity to provide their household size and income. They are also offered the opportunity to provide the race and ethnicity of their children.

Salary / Wages

Yes

No

\$40000 yearly

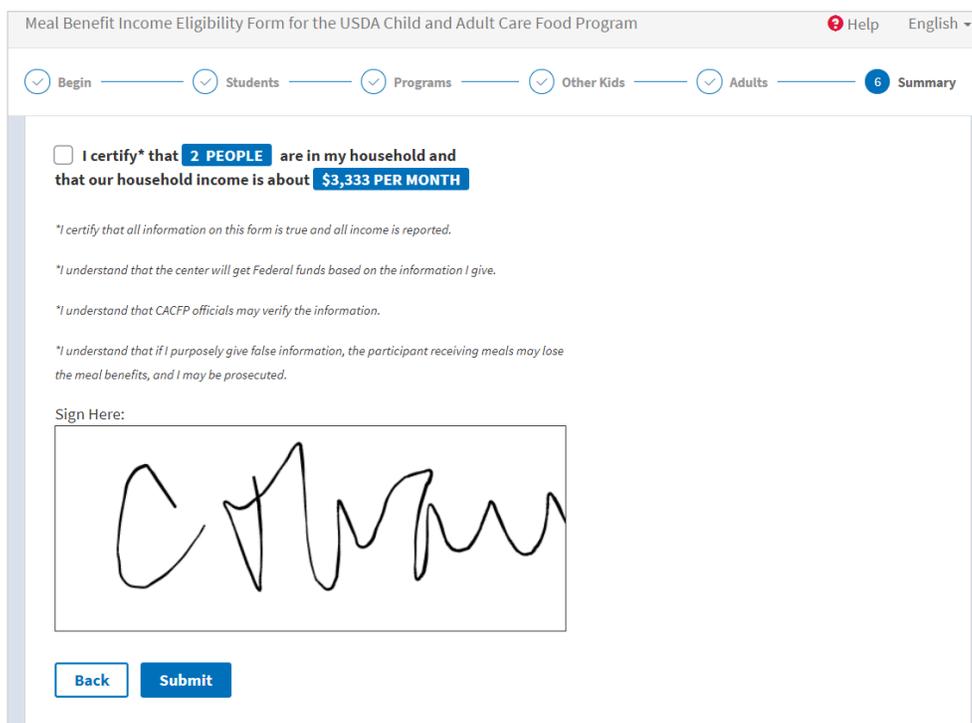
+ Add Income Source

Step 3: Email Request to Parent/Guardian



Form is Certified and Signed by Primary Guardian

At the end of the Ready Records web form, the information provided is presented in a summary screen. The primary guardian certifies the accuracy of the information provided and signs their name using a touch screen or mouse.



Meal Benefit Income Eligibility Form for the USDA Child and Adult Care Food Program

Begin — Students — Programs — Other Kids — Adults — **6 Summary**

I certify* that **2 PEOPLE** are in my household and that our household income is about **\$3,333 PER MONTH**

**I certify that all information on this form is true and all income is reported.*

**I understand that the center will get Federal funds based on the information I give.*

**I understand that CACFP officials may verify the information.*

**I understand that if I purposely give false information, the participant receiving meals may lose the meal benefits, and I may be prosecuted.*

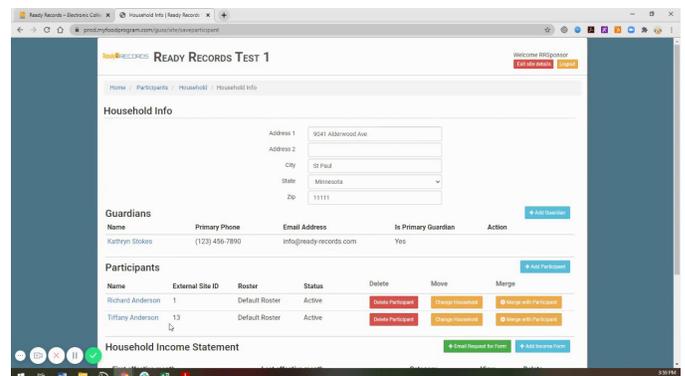
Sign Here:



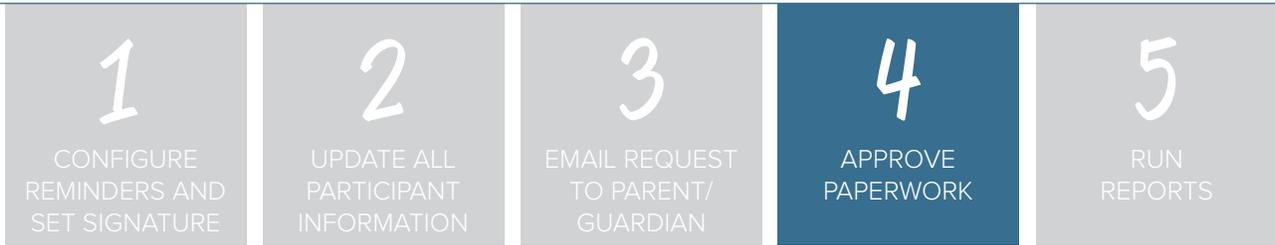
[Back](#) [Submit](#)

Video Tutorials

Visit our [YouTube channel](#) or click the image to watch our training video on *How to Send a Ready Records Request to a Parent*.



Step 4: Approve Paperwork

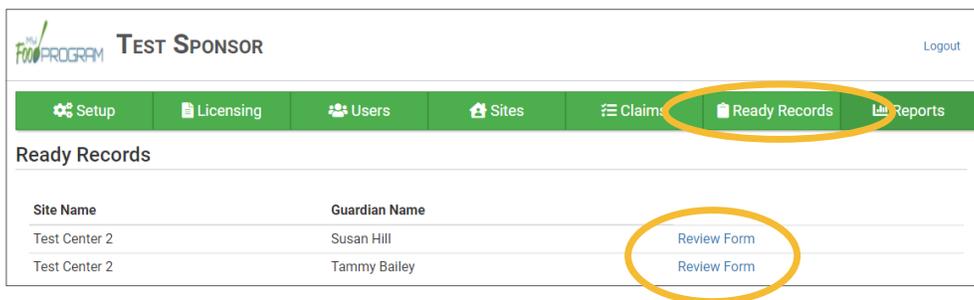


Step 4: Approve Paperwork.

After a parent/guardian has provided the income and enrollment information, a form will appear under Household Income Statements that is placed in PENDING status. The sponsor must approve and sign the form before it will be used in a claim.

To approve a form:

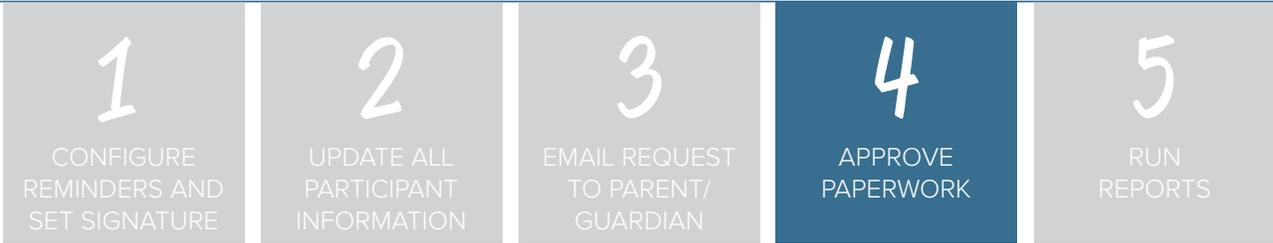
- Login as a sponsor admin user. (Ensure that you have a signature on file)
- Click on “Ready Records” tab from the main dashboard.
- Click on “Review Form” to go to the Household Income Form page.



- Change the status of the form to “Approved” and enter the effective and expiration dates along with the reason for the household income category. A recap of the information provided by the parent/guardian appears on this screen to assist you with classification.

To view or print the form, go back to the household information page and click “View Document”.

Step 4: Approve Paperwork



Approved Forms are Available

The approved income and enrollment forms with signatures can be printed at any time. The form onto which the data is populated depends on the state. For most states, it will be the USDA income form and our MFP generic enrollment form. For states that require the use of their own form, then the data will be populated onto that form. We know this is the case for Alabama, Wisconsin, Louisiana, Florida and Georgia.

CACFP Child Care Income Eligibility Form (IEF) for 2018-2019

STEP 1 List ALL children in day care

Child's First Name: A d r i e n Age: 6 Child's Last Name: H a g e d o m

Children in Foster care or Head Start are eligible for free meals. If you are a parent or guardian of a child in foster care or Head Start, you are not eligible for free meals. If you are a parent or guardian of a child in foster care or Head Start, you are not eligible for free meals. If you are a parent or guardian of a child in foster care or Head Start, you are not eligible for free meals.

STEP 2 Do any household members (including past/current) participate in one or more of the following assistance programs: SNAP, TANF, or FOSTER?

STEP 3 Report Income for ALL Household Members (Step this step if you answered "Yes" to STEP 2)

A. Child Income

Child's Name: Christine Twait

STEP 4 Contact Information and Adult Signature

Print Name of Adult Signing the Form: Christine Twait

Address: 2042 Wooddale Drive Suite 250, Woodbury, MN 55125

Signature of Adult: [Signature]

Date: 08/27/2019

Phone Number: (651) 433-7345

Child Care Food Program Enrollment Form
Site Name: KinderCare 000156

All Children in Household

| Name | Date of Birth | Normal Hours | Check the Normal Days of Care / Meals* |
|----------------|---------------|--------------------|--|
| Adrien Hagedom | 07/18/2013 | 8:00 am - 10:45 am | Mon: [X] Tue: [X] Wed: [X] Thu: [X] Fri: [X] Sat: [X] Sun: [X] |
| | | | Mon: [X] Tue: [X] Wed: [X] Thu: [X] Fri: [X] Sat: [X] Sun: [X] |
| | | | Mon: [X] Tue: [X] Wed: [X] Thu: [X] Fri: [X] Sat: [X] Sun: [X] |
| | | | Mon: [X] Tue: [X] Wed: [X] Thu: [X] Fri: [X] Sat: [X] Sun: [X] |

Parent/Guardian Signature: [Signature] Date: 08/27/2019

Print Name: Christine Twait Phone Number: (651) 433-7345

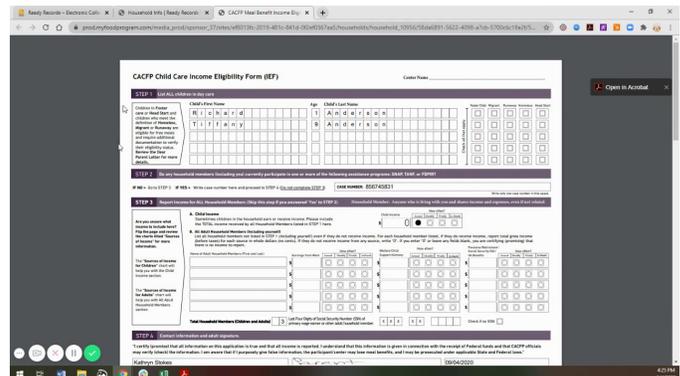
Address: 2042 Wooddale Drive Suite 250, Woodbury, MN 55125

Effective: 8/27/2019 to 8/27/2020

Non-discrimination Statement: In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or marital or marital status in any program or activity conducted or funded by USDA. Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.), should contact the Agency (State or local) where they applied for benefits. Individuals who are blind, deaf or hearing impaired, deaf-blind, or visually impaired may contact USDA through the Federal Relay Service at 800-877-8339. Additionally, program information may be made available in Braille or large print. To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form (AD-3027) found online at: http://www.usda.gov/complaint_filing_cust.html, and file it directly with USDA or file a letter addressed to USDA and provide the letter with all the information requested in the form. To request a copy of the complaint form, call (866) 632-6992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 696-7442; or (3) email: program.adjudication@usda.gov. This institution is an equal opportunity provider.

Video Tutorials

Visit our [YouTube channel](#) or click the image to watch our training video on *How to Approve a Ready Records Form*.



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Step 5: Run Reports.

The majority of reports are contained in site-level reports. Sponsor-level reports are those that aggregate data across multiple sites.

Sponsor-Level Reports

- Expired/Missing HIEF
- Pending HIEF Report
- Income Certification Address Logging

Site-Level Reports

- Ethnicity/Racial Report
- Household Report
- Duplicate Case Number Report
- Missing Forms Report
- Site Summary Report

To run a report:

- Login as a sponsor admin user.
- Click on “Reports”.
- Select the report that you would like to run and follow the prompts.

Need More Help? Just Ask!

If you're still in need of help, we're here! Please reach out to us by phone 651-433-7346, email info@ready-records.com or a web chat at ready-records.com.

The entire on-boarding process can happen as quickly or as slowly as you need. We have gotten through all these steps in the same day with customers and had them up-and-running in hours. Other customers take more time and that's fine by us. What we want is a successful experience for YOU!

JOIN THE CONVERSATION!

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[Ready Records](https://www.youtube.com/ReadyRecords)