

## 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](mailto:info@ready-records.com) or 651-433-7346.

**Ready? Let's go!**

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REMINDERS AND  
SET SIGNATURE

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## Step 1: Configure Reminders and Set Signature

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### 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	<input type="text" value="35"/>
Second Guardian Email Reminder (days)	<input type="text" value="28"/>
Third Guardian Email Reminder (days)	<input type="text" value="21"/>
Fourth Guardian Email Reminder (days)	<input type="text" value="14"/>
Fifth Guardian Email Reminder (days)	<input type="text" value="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

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### 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
<input checked="" type="checkbox"/> Primary Guardian for Household	
<a href="#">Save</a>	

- Children's Names, Birthdates and Start Dates

First Name *	Bethany
Middle Name	
Last Name *	Johnson
Birthdate Estimated	<input type="checkbox"/>
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						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	07:00 am 04:00 pm	07:00 am 04:00 pm	07:00 am 04:00 pm	07:00 am 04:00 pm	07:00 am 04:00 pm	
	Breakfast PM Snack Lunch	Breakfast PM Snack Lunch	Breakfast PM Snack Lunch	Breakfast PM Snack Lunch	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

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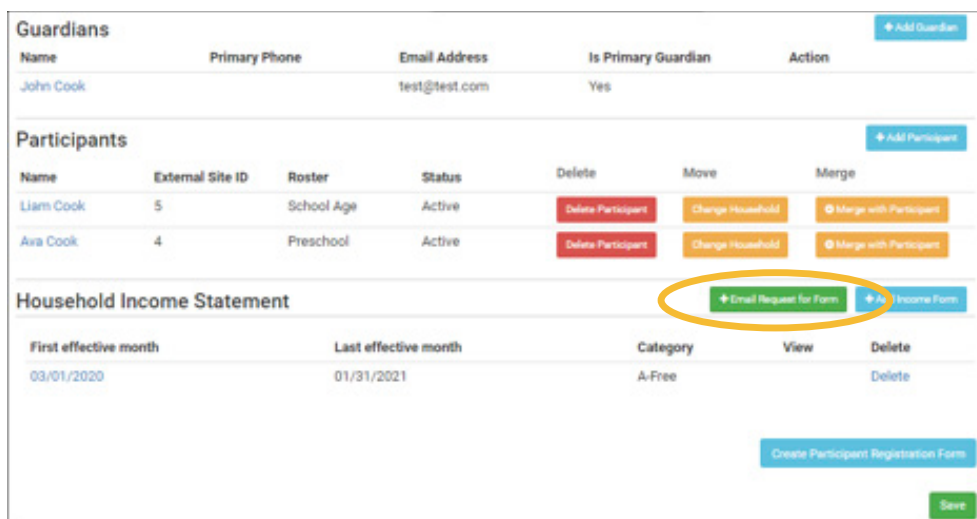
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### Step 3: Email Request to Parent/Guardian.

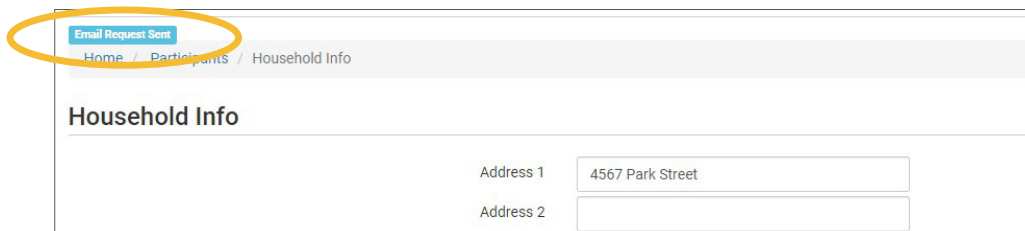
To send an email to the parent/guardian requesting that they complete the Food Program paperwork:

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



The screenshot shows the 'Guardians' and 'Participants' sections. In the 'Household Income Statement' section, the 'Email Request for Form' button is circled in orange. Below it, there is a 'Create Participant Registration Form' button and a 'Save' button.

- 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”.



The screenshot shows a confirmation message 'Email Request Sent' circled in orange. Below it, there is a 'Household Info' section with fields for 'Address 1' and 'Address 2'. The 'Address 1' field contains '4567 Park Street'.

- 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

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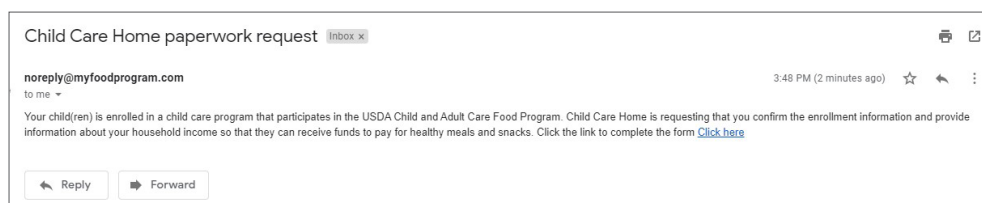
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An email will be instantly sent to the parent/guardian email address. Instruct them to look for an email from “noreply@myfoodprogram.com” and click the link. The module will walk the parent/guardian through the process step-by-step.



### Primary Guardian Confirms Enrollment



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

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


## Before you begin...


there are a few things you should know.

We need only one application for all the participants in your household.

**Eligibility**  **for free or reduced price benefits is based on any one of these three things:** 

- your total household income and size in the month the application is filled out, or the month before, or
- your child's individual status as foster, homeless, migrant or runaway, or
- participation in an assistance program by any member of your household

Your **US citizenship or immigration status**  does not affect your eligibility for free and reduced price benefits.

If you have questions at any point during the application, click the question mark icon  to get help with the current section.

## Things you'll need

Lastly, we compiled a list of the information you might need to complete the application. [Check it out!](#)

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### 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.

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

Begin **2 Students** 3 Programs 4 Other Kids 5 Adults 6 Summary

Verify the names of enrolled children in your household that are enrolled in care. If you notice any errors, please contacts the center and have them correct this information.

**Adrien**

**First name** required  
Adrien

**Middle name**

**Last name** required  
Hagedorn

**Suffix (e.g. Jr., Sr., I, II, III)**

**Birthday:**  
07/18/2013

**What days is your child normally in care?**

Monday x Tuesday x  
Wednesday x Thursday x  
Friday x

**What hours is your children normally in care?**

**To:**  
8:00 am

**From:**  
4:00 pm

**To:**

**From:**

**What meals does your child normally eat while in care?**

Breakfast x Lunch x  
PM Snack x

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### 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 Help English

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 checkboxes 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)

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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

+ Add Income Source

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### 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

Help English

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:



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### 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*.

Ready Records - Electronic Copy | Household Info | Ready Records

READY RECORDS TEST 1

Home | Participants | Household Info | Household Info

Household Info

Address 1 9541 Alderwood Ave  
Address 2  
City St Paul  
State Minnesota  
Zip 55111

Guardians

Name	Primary Phone	Email Address	Is Primary Guardian	Action
Kathryn Stokes	(123) 456-7890	info@ready-records.com	Yes	<a href="#">Add Guardian</a>

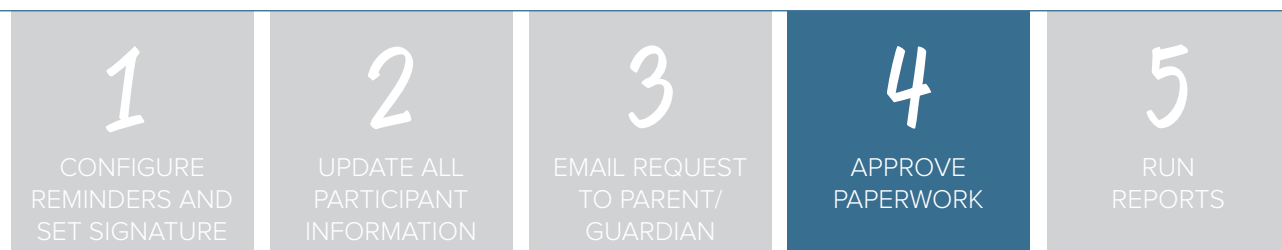
Participants

Name	External Site ID	Roster	Status	Delete	Move	Merge
Richard Anderson	1	Default Roster	Active	<a href="#">Delete Participant</a>	<a href="#">Change Roster</a>	<a href="#">Merge with Participant</a>
Tiffany Anderson	13	Default Roster	Active	<a href="#">Delete Participant</a>	<a href="#">Change Roster</a>	<a href="#">Merge with Participant</a>

Household Income Statement

[Email Request to Parent](#) [Add Income Item](#)

## Step 4: Approve Paperwork

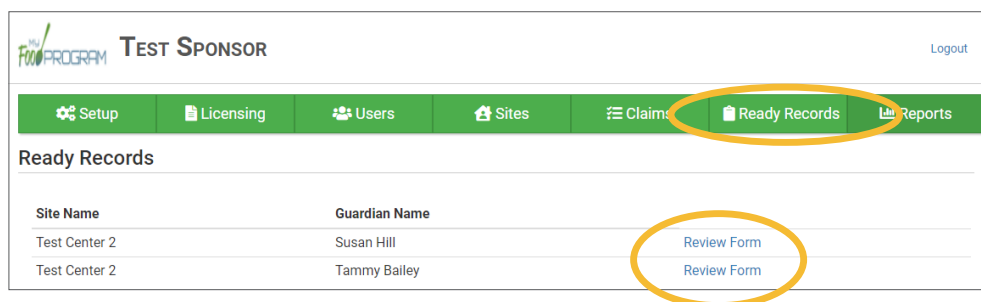


### Step 4: Approve Paperwork.

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.

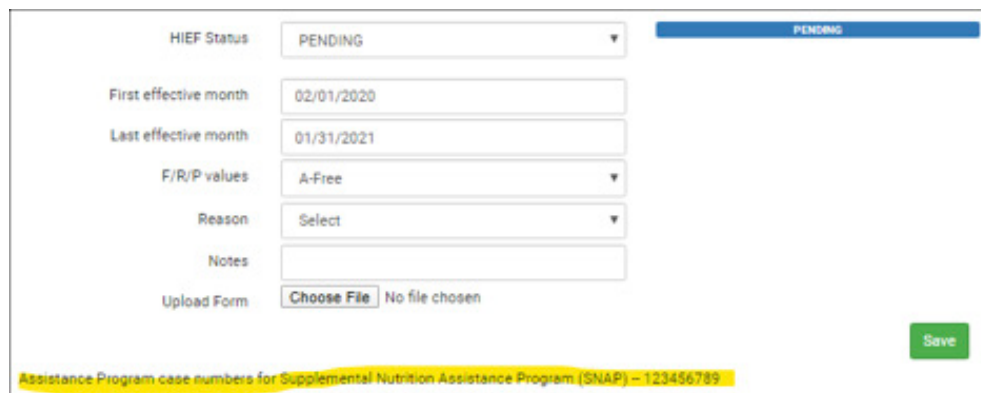
To approve a form:

- 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.



Site Name	Guardian Name	
Test Center 2	Susan Hill	<a href="#">Review Form</a>
Test Center 2	Tammy Bailey	<a href="#">Review Form</a>

- 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.



HIEF Status: PENDING

First effective month: 02/01/2020

Last effective month: 01/31/2021

F/R/P values: A-Free

Reason: Select

Notes:


Upload Form:  No file chosen

Assistance Program case numbers for Supplemental Nutrition Assistance Program (SNAP) – 123456789

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

## 5

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 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.




# 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 (Meal) that the Child Normally Receives while in Care each Day (B = Breakfast   A = All Snacks   L = Lunch   P = PM Snacks   S = Support   E = Evening Snacks)						
Adrien Hagedorn	07/18/2013	8:00 am - 7:00 pm	Mon	Tues	Weds	Thurs	Fri	Sat	Sun
			<input type="checkbox"/> B	<input type="checkbox"/> A	<input type="checkbox"/> L	<input type="checkbox"/> P	<input type="checkbox"/> S	<input type="checkbox"/> E	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
to			Mon	Tues	Weds	Thurs	Fri	Sat	Sun
			<input type="checkbox"/> B	<input type="checkbox"/> A	<input type="checkbox"/> L	<input type="checkbox"/> P	<input type="checkbox"/> S	<input type="checkbox"/> E	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
to			Mon	Tues	Weds	Thurs	Fri	Sat	Sun
			<input type="checkbox"/> B	<input type="checkbox"/> A	<input type="checkbox"/> L	<input type="checkbox"/> P	<input type="checkbox"/> S	<input type="checkbox"/> E	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
to			Mon	Tues	Weds	Thurs	Fri	Sat	Sun
			<input type="checkbox"/> B	<input type="checkbox"/> A	<input type="checkbox"/> L	<input type="checkbox"/> P	<input type="checkbox"/> S	<input type="checkbox"/> E	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
to			Mon	Tues	Weds	Thurs	Fri	Sat	Sun
			<input type="checkbox"/> B	<input type="checkbox"/> A	<input type="checkbox"/> L	<input type="checkbox"/> P	<input type="checkbox"/> S	<input type="checkbox"/> E	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


Parent/Guardian Signature: 

Print Name: **Christine Twait**

Address: **2042 Woodlake Drive Suite 250**

City: **Woodbury** State: **MN** Zip Code: **55125**

Effective: **8/27** / **2019** **8/27** / **2020**

Sponsoring Organization Signature: 

**Non-discrimination Statement:** In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the U.S. Agencies, offices, and employees, and representatives administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability age or marital status or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA. Persons with disabilities who require alternative means of communication for program information (Braille, large print, audiotape, American Sign Language, etc.), should contact the USDA National Relay Service at (877) 873-3223. Additional program information may be made available in languages other than English. To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form as instructed on the back and mail to the USDA National Relay Service, 1492 L Street, NW, Washington, DC 20503, or email at [usda.nrs@aphis.usda.gov](mailto:usda.nrs@aphis.usda.gov), or write to any USDA office, or write a letter of the information requested in the form. To request a copy of this complaint form, call (866) 623-6422. Visit [www.aphis.usda.gov](http://www.aphis.usda.gov) for further information. USDA is an equal opportunity provider and employer. Child Care Food Program, 1400 Independence Avenue, SW, Washington, DC 20250-9442, or (202) 690-7442, or (8) email [program.intel@aphis.usda.gov](mailto:program.intel@aphis.usda.gov). This institution is an equal opportunity provider.

[illegible][illegible]

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](mailto:info@ready-records.com) or a web chat at [ready-records.com](https://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!

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