

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

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.

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	☒
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:	
Clear Signature	

Step 2: Update All Participant Information

1

CONFIGURE
REMINDERS AND
SET SIGNATURE

2

UPDATE ALL
PARTICIPANT
INFORMATION

3

EMAIL REQUEST
TO PARENT/
GUARDIAN

4

APPROVE
PAPERWORK

5

RUN
REPORTS

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						
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	

Step 2: Update All Participant Information

1

CONFIGURE
REMINDERS AND
SET SIGNATURE

2

UPDATE ALL
PARTICIPANT
INFORMATION

3

EMAIL REQUEST
TO PARENT/
GUARDIAN

4

APPROVE
PAPERWORK

5

RUN
REPORTS

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

1

CONFIGURE
REMINDERS AND
SET SIGNATURE

2

UPDATE ALL
PARTICIPANT
INFORMATION

3

EMAIL REQUEST
TO PARENT/
GUARDIAN

4

APPROVE
PAPERWORK

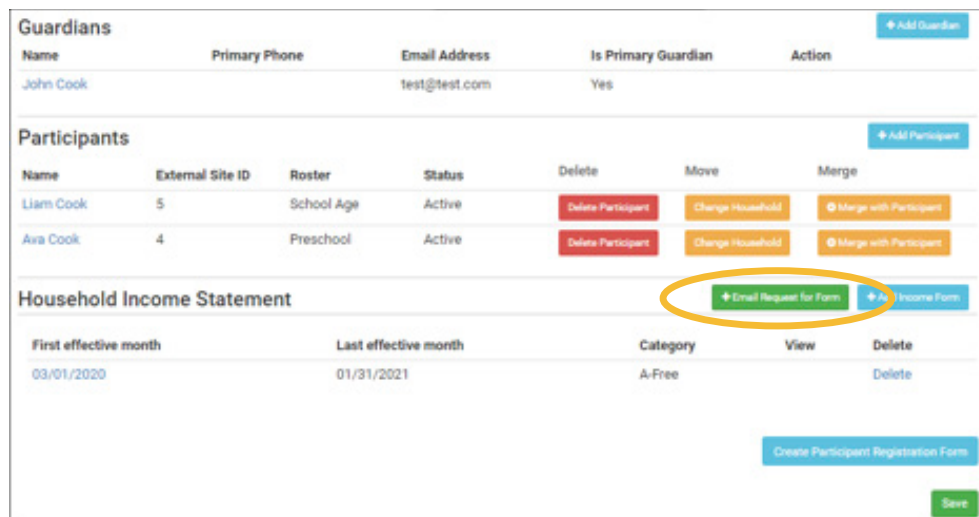
5

RUN
REPORTS

Step 3: Email Request to Parent/Guardian.

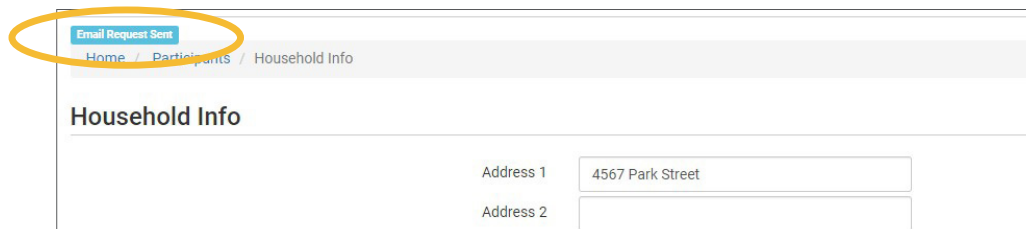
To send an email to the parent/guardian requesting that they complete the Food Program paperwork:

- 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

Step 3: Email Request to Parent/Guardian

1

CONFIGURE
REMINDERS AND
SET SIGNATURE

2

UPDATE ALL
PARTICIPANT
INFORMATION

3

EMAIL REQUEST
TO PARENT/
GUARDIAN

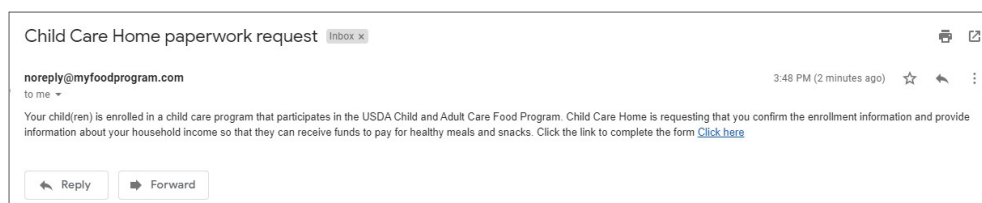
4

APPROVE
PAPERWORK

5

RUN
REPORTS

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!](#)

[Back](#) [Continue](#)

Step 3: Email Request to Parent/Guardian

1

CONFIGURE
REMINDERS AND
SET SIGNATURE

2

UPDATE ALL
PARTICIPANT
INFORMATION

3

EMAIL REQUEST
TO PARENT/
GUARDIAN

4

APPROVE
PAPERWORK

5

RUN
REPORTS

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 contact 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

[Back](#) [Continue](#)

Step 3: Email Request to Parent/Guardian

1

CONFIGURE
REMINDERS AND
SET SIGNATURE

2

UPDATE ALL
PARTICIPANT
INFORMATION

3

EMAIL REQUEST
TO PARENT/
GUARDIAN

4

APPROVE
PAPERWORK

5

RUN
REPORTS

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)

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.

Salary / Wages

☒ Yes

☐ No

+ Add Income Source

Step 3: Email Request to Parent/Guardian

1

CONFIGURE
REMINDERS AND
SET SIGNATURE

2

UPDATE ALL
PARTICIPANT
INFORMATION

3

EMAIL REQUEST
TO PARENT/
GUARDIAN

4

APPROVE
PAPERWORK

5

RUN
REPORTS

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:



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*.

Ready Records - Electronic Data Entry | Household Info | Ready Records

READY RECORDS TEST 1

Home / Participants / 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	Add Guardian

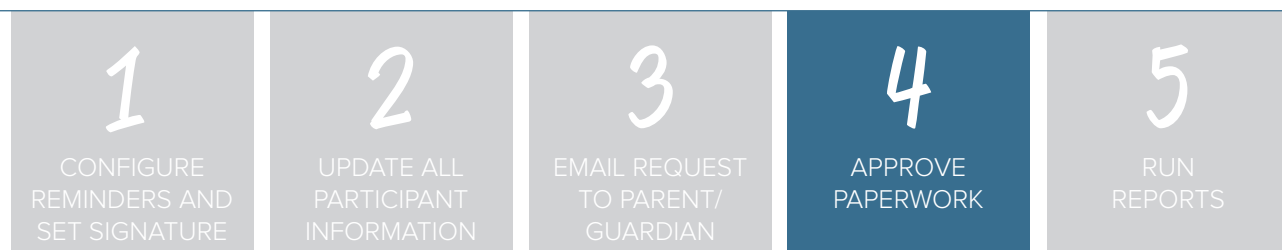
Participants

Name	External Site ID	Roster	Status	Delete	Move	Merge
Richard Anderson	1	Default Roster	Active	Unlink Participant	Change Household	Unlink with Participant
Tiffany Anderson	13	Default Roster	Active	Unlink Participant	Change Household	Unlink with Participant

Household Income Statement

Send Request to Parent Add Income Item

Step 4: Approve Paperwork

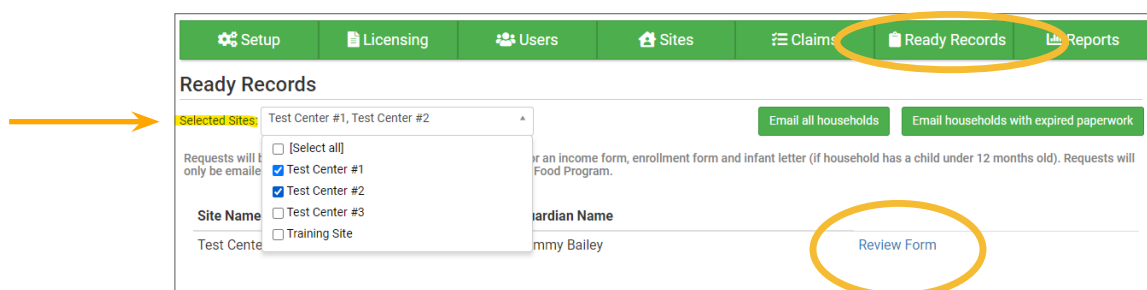


Step 4: Approve Paperwork.

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.
- From here you can filter the list of forms awaiting sponsor approval. This applies to both the centers to which you are emailing requests for paperwork and the centers with pending forms.
- Click on “Review Form” to go to the Household Income Form page.



Setup Licensing Users Sites Claims **Ready Records** Reports

Ready Records

Selected Sites: Test Center #1, Test Center #2

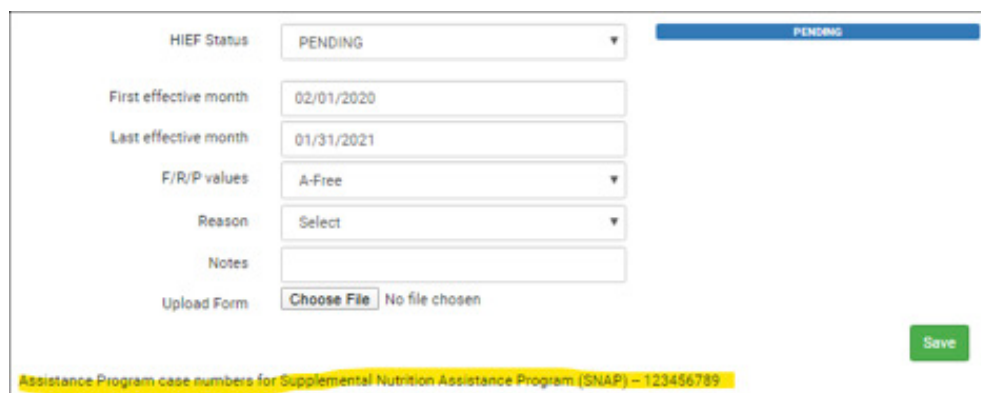
Requests will only be emailed to: ☐ [Select all] ☒ Test Center #1 ☒ Test Center #2 ☐ Test Center #3 ☐ Training Site

Site Name: Test Center

Guardian Name: Tommy Bailey

Review Form

- 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: Choose File No file chosen

Save

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”.

Step 4: Approve Paperwork

1

CONFIGURE
REMINDERS AND
SET SIGNATURE

2

UPDATE ALL
PARTICIPANT
INFORMATION

3

EMAIL REQUEST
TO PARENT/
GUARDIAN

4

APPROVE
PAPERWORK

5

RUN
REPORTS

View Status of Requests

Center Directors can see when a parent/guardian has started a Ready Records request and when they have completed the request. In order to find this information, please visit the Household page:

- Click on “Sites” tab from the main dashboard and select the site you would like to view.
- Then select the “Participants & Rosters” button.
- Click the name of the Guardian for the Household you are looking for.
- Scroll to the bottom under “Ready Records Requests”.

Ready Records Requests			
Date Sent	Sent to	Started on	Completed on
02/25/2021	christine@myfoodprogram.com	02/25/2021 02:08 PM	02/25/2021 02:08 PM
02/23/2021	christine@myfoodprogram.com	02/23/2021 02:55 PM	

Step 4: Approve Paperwork

1

CONFIGURE
REMINDERS AND
SET SIGNATURE

2

UPDATE ALL
PARTICIPANT
INFORMATION

3

EMAIL REQUEST
TO PARENT/
GUARDIAN

4

APPROVE
PAPERWORK

5

RUN
REPORTS

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 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	Age	Child's Last Name	Home Child	Regular	Part-time	Non-regular	Non-regular
Adrian	5	Hagedorn	☐	☐	☐	☐	☐

STEP 2 Do any household members (including paid caregivers) participate in one or more of the following assistance programs: SNAP, TANF, or FOSTA?

IF YES → Go to STEP 3 IF NO → Write case number here and proceed to STEP 4 (Go to complete STEP 4)

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

A. Child Income

Child's Name	Source of Income	Amount	Frequency	Notes
Christine Twait	Wages	\$1,234	Monthly	

STEP 4 Submit information and adult signature.

I certify (I warrant) that all information on this application is true and that all income is reported. I understand that this information is given in connection with the receipt of Federal funds and that CACFP officials may verify this information. I am aware that if I purposely give false information, the participant(s) may lose their benefits, and may be prosecuted under applicable State and Federal laws.

Print Name of Adult Signing the Form: Christine Twait
Address: 2042 Wooddale Drive Suite 250
City: Woodbury State: MN Zip: 55125 Phone: (651) 433-7345

Sources of Income

Source of Income for Children:

- Wages or salary from a job or part-time job where they are an active member
- Wages or salary from a job or part-time job where they are not an active member
- Wages or salary from a job or part-time job where they are not an active member
- Wages or salary from a job or part-time job where they are not an active member

Source of Income for Adults:

- Wages or salary from a job or part-time job where they are an active member
- Wages or salary from a job or part-time job where they are not an active member
- Wages or salary from a job or part-time job where they are not an active member
- Wages or salary from a job or part-time job where they are not an active member

STEP 5 Children's Ethnic and Racial Identities

We request you to check for information about your children's race and ethnicity. Reporting to this section is optional and does not affect your children's eligibility for receiving meals during care. Check all boxes that apply to the children in your care. If this information is left blank, the institution may complete it based on visual identification.

Ethnicity: ☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or Other Pacific Islander ☒ White (Include Hispanic or Latino)

DO NOT FILL OUT For center staff use only

Annual Income Comparison: Weekly x 52, Every 2 Weeks x 26, Twice a Month x 24, Monthly x 12. This form requires 12 months after the month in which the institution makes the determination.

Total Income: 8,333.33 Household size: 2 Date: 08/27/2019

Child Care Food Program Enrollment Form
Site Name: Kindergarten 000155

All Children in Household

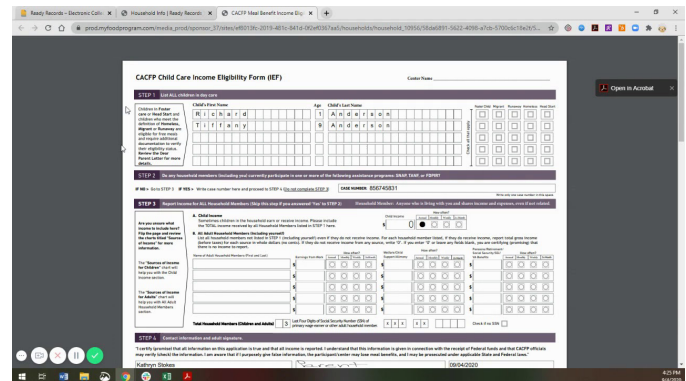
Name	Date of Birth	Normal Hours	Check the Normal Days of Care / Meals that the Child Normally Receives while in Care each day:
Adrian Hagedorn	07/18/2013	8:00 am - 1:00 pm	Mon: ☐ Tue: ☐ Wed: ☐ Thurs: ☐ Fri: ☐ Sat: ☐ Sun: ☐

Parent/Guardian Signature: Christine Twait Date: 08/27/2019
Print Name: Christine Twait Phone Number: (651) 433-7345
Address: 2042 Wooddale Drive Suite 250 City: Woodbury State: MN Zip Code: 55125
Effective: 8/27/2019 to 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 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 relationship to 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 (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 deaf, hard of hearing, or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, 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 (AD-3027) found online at: <http://www.usda.gov/complaint>, fill in, and mail it to USDA or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 628-9892. Submit your completed form or letter to USDA by 8/1 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) 690-7442, or (3) email: program.intake@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*.



1

CONFIGURE
REMINDERS AND
SET SIGNATURE

2

UPDATE ALL
PARTICIPANT
INFORMATION

3

EMAIL REQUEST
TO PARENT/
GUARDIAN

4

APPROVE
PAPERWORK

5

RUN
REPORTS

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!

[@CACFPreadyrecords](https://www.facebook.com/CACFPreadyrecords)



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