



Orchard

Child Nutrition Programs (CNP)

Version 1.0

October 2022

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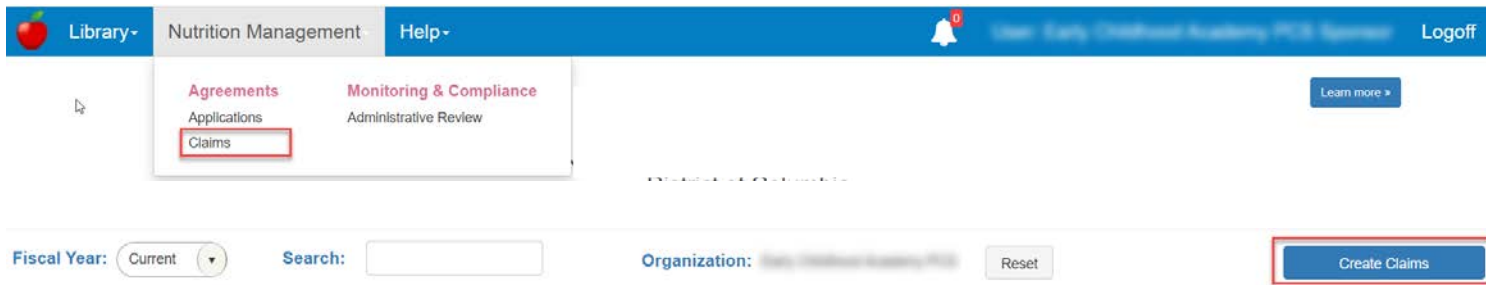
Annual Orchard Application Availability

Child Nutrition Program (CNP) **applications must be approved** by the State Agency for the applicable program year in order to create claims. Renewals and new applications for the upcoming year are available as follows:

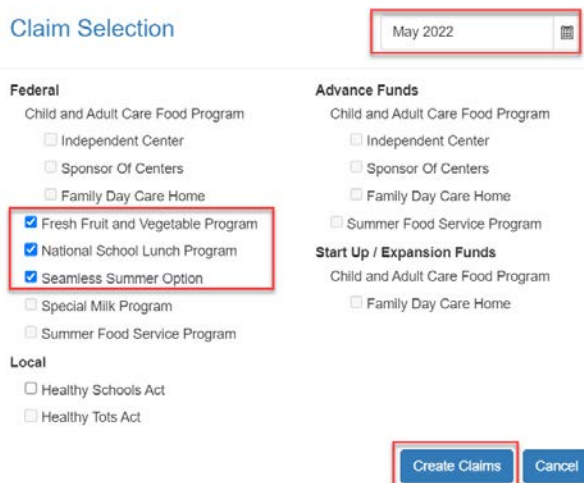
Child Nutrition Program (CNP)	Available in Orchard
Summer Food Service Program (SFSP)	Feb. 1
Fresh Fruit & Vegetable Program (FFVP)	Apr. 1
National School Lunch Program (NSLP) (inclusive of the School Breakfast Program (SBP), Afterschool Snack Program (ASP), and Seamless Summer Option (SSO))	June 1
Child Adult Care Food Program (CACFP)	July 1

Create Claim(s)

1. Log into [Orchard](#) with your assigned username and password.
2. Under the **Nutrition Management/Agreements** menu option, click **Claims**
3. Users can click **Create Claims** to begin the claims process



4. The system will prompt users to select the **Month/Year** for the claim(s) they would like to initiate
5. The user will then select the type(s) of claims they would like to begin for the selected **Month/Year**.
6. Users will click **Create Claims** to initiate the claims.



Dashboard Navigation

1. The dashboard defaults to all **Current** Fiscal Year Claims. Users can choose a specific program year from the dropdown to access Orchard claims from prior years.

The screenshot shows the dashboard interface. At the top, there is a 'Fiscal Year' dropdown menu currently set to 'Current'. A dropdown menu is open, showing years from 2019 to 2023, with '2021' highlighted. To the right of the dropdown is a 'Search' input field and an 'Organization' dropdown. A 'Reset' button is located to the right of the 'Organization' dropdown. A 'Create Claims' button is in the top right corner. Below the filters, there are two main sections: 'In Progress (2)' and 'All (2)'. The 'In Progress (2)' section has a sub-filter for 'Draft' with a count of 2. Below this, there are three buttons: 'Returned for Modification' (0) and 'Pending Review' (0). A table below shows two rows of claims:

Claim	Month / Year	Fund Type	Amount	Status	Processed	Version
NSLP	April 2022	Federal	\$0.00	Draft		1
SSO	January 2022	Federal	\$0.00	Draft		1

At the bottom, there is a pagination control showing '1' items per page and '1 - 2 of 2 items'.

2. The dashboard defaults to **In Progress** claims. Users can choose to view **Processed** or **All** by selecting the additional filtering options available as shown below.

This screenshot shows the dashboard with the 'In Progress (2)' filter selected. The dashboard displays three filters: 'Draft' (1), 'Returned for Modification' (0), and 'Pending Review' (1).

This screenshot shows the dashboard with the 'Processed (5)' filter selected. The dashboard displays three filters: 'Approved' (5), 'Paid' (0), and 'Denied' (0).

This screenshot shows the dashboard with the 'All (7)' filter selected. The dashboard displays five filters: 'Draft' (1), 'Returned for Modification' (0), 'Pending Review' (1), 'Approved' (5), and 'Paid' (0). There is also a 'Denied' filter with a count of 0.

Filters	Description
Draft	The claim or claim amendment has been initiated by the user.
Returned for Modification	The claim was returned to the submitter for modification by the State Agency (SA).
Pending Review	The claim is submitted and under review by the State Agency (SA).
Approved	The claim is approved by the State Agency (SA) and is awaiting payment.
Paid	The Approved claim has been paid by OCFO to the organization.
Denied	The claim was denied by the State Agency (SA).

Understanding the Claims Dashboard

Claim	The Child Nutrition Program (CNP) claim for which the organization has requested reimbursement for.
Month / Year	The month and year for which the claim is being submitted.
Fund Type	Identifies whether the claim uses Federal or Local funds.
Amount	The total monthly reimbursement amount approved for the month's claim.
Status	The status of the claim / amendment.
Processed	The date the claim was approved or denied.
Version	The most recent version # assigned to the claim as updates are made.

Claim Workflow History


- To access the **Action log** users will click the corresponding claim status hyperlink. The information displayed provides details of the workflow and the current claim along with any amendments.

Claim	Month / Year	Fund Type	Amount	Status	Processed	Version
NSLP	October 2021	Federal		Draft		1
FFVP	January 2022	Federal		Pending Review		2

Navigation: 1 | 20 items per page | 1 - 2 of 2 items

- Future system enhancements** will include email notifications and alerts sent to users when the claim status updates advising users to log in and check the action log for additional information. The claims specialist will communicate with users through this action log when requesting modifications. Our office encourages applicants to utilize the comments section when submitting their claims to confirm and or provide additional information related to the submission that their claim specialist may need to know.

- Click on the Excel icon to export the History list to an excel spreadsheet.

Action Log				
Id: NL2122-030046		Version: 1		
Version	Action	Comments	Updated By	Update Date
1.0	Approved			7/22/2022
1.0	Pending Final Review			7/22/2022
1.0	Submitted			7/22/2022

Navigation: 1 | 5 items per page | 1 - 3 of 3 items

Claim Navigation

1. Users will be placed inside of the claim upon initiating the new claim (*explained above in Create Claim(s)*) otherwise the user will need to navigate from the dashboard to open the claim (*explained above in Dashboard Navigation*).

Header Section

2. The system will display the **Header Section** as the user navigates throughout the claim. Features of this section include:

Approval Flow Steps

Claim Number: NL2122-040035 Version: 1.0 Late Submission ⓘ

National School Lunch Program (NSLP)

April 2022

Not Submitted Processed Paid

Total Month Reimbursement	\$13,588.55
Version 1.0 Reimbursement	\$13,588.55

Total Month Reimbursement and Version X.X Reimbursement

Claim Number: NL2122-040035 Version: 1.0 Late Submission ⓘ

National School Lunch Program (NSLP)

April 2022

Not Submitted Processed Paid

Total Month Reimbursement	\$13,588.55
Version 1.0 Reimbursement	\$13,588.55

Navigation to **other nutrition programs'** claims for the same month and year

Claim Number: NL2122-040035 Version: 1.0 Late Submission ⓘ

National School Lunch Program (NSLP)

April 2022

Not Submitted Processed Paid

Total Month Reimbursement	\$13,588.55
Version 1.0 Reimbursement	\$13,588.55

Navigation to other **months'** claims for the same month and year

Claim Number: NL2122-040035 Version: 1.0 Late Submission ⓘ

National School Lunch Program (NSLP)

April 2022

Not Submitted Processed Paid

Total Month Reimbursement	\$13,588.55
Version 1.0 Reimbursement	\$13,588.55

Site Details

3. The system will default the user to the **Site Details** section of the claim. Users can navigate to different sections of the claim by using the left navigation or the **Prev Form** and **Next Form** options at the bottom of the screen.

Note: The site details display contains customized content applicable to the child nutrition program selected.

Claim Number: NL2122-040035 Version: 1.0 Late Submission ⓘ

National School Lunch Program (NSLP)

April 2022

Total Month Reimbursement	\$13,588.55
Version 1.0 Reimbursement	\$13,588.55

Site Name	Include on Claim	Claim Status	Site Type	Group	Version	Breakfast (Severe Need)	Area Eligible	At
(8771)	<input checked="" type="checkbox"/>	Not Submitted	CEP	2	1.0	No	Yes	
(8810)	<input checked="" type="checkbox"/>	Not Submitted	CEP	2	1.0	No	Yes	
(8865)	<input checked="" type="checkbox"/>		Standard			No	Yes	

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- The system will default the Site Details list to include meal sites that are on the corresponding Child Nutrition Program (CNP) application. The CNP application must be **Approved** with the sites determined to be **Eligible** (accepted for FFVP) AND have an operating status that is **Active**.

*NOTE: sites that are Eligible but have an operating status that is **Inactive** can be added to the claim but will not be approved until the application is updated accordingly.*

The system will default to sites being **Included on Claim**. Users may deselect sites to exclude them from the monthly claim submission.

- Sponsors will enter monthly aggregate data per site (Ex. meal service data by meal type, total site attendance, enrollment). FFVP sites provide program data per month per site. Daily meal count **Edit checks** only need to be uploaded if requested by the State Agency.

Site Name	Include on Claim	Claim Status	Site Type	Group	Version	Breakfast (Severe Need)	Area Eligible	Total Attendance	Attendance Factor
(8771)	<input checked="" type="checkbox"/>	Not Submitted	CEP	2	1.0	No	Yes	10	0.0 %
(8810)	<input checked="" type="checkbox"/>	Not Submitted	CEP	2	1.0	No	Yes	10	0.0 %
(8865)	<input checked="" type="checkbox"/>		Standard			No	Yes	100	100.0 %
(8870)	<input checked="" type="checkbox"/>	Not Submitted	CEP	2	1.0	No	Yes	10	0.0 %
(8946)	<input checked="" type="checkbox"/>	Not Submitted	CEP	2	1.0	No	Yes	10	0.0 %

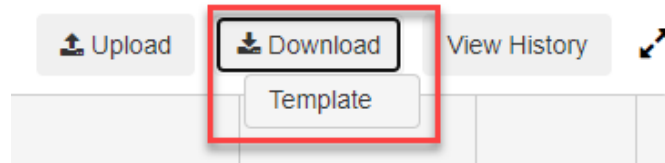
- Users have two options for entering data:
 - Enter data directly into the Site Detail grid (shown above), or

- Go to the next step to use the excel import feature.

NOTE: Users must complete all required fields for sites that are being included on the claim prior to saving.

Download Template

7. Locate the **Download** button above the site grid, click on it, then select the **Template** option. The template will download to the user's local drive. Open the file to view and edit the required information.



8. Review the fields listed in the Template sheet. Users can refer to the definitions of these fields in the Descriptions sheet in the same workbook. Templates will be prepopulated with data displayed on the Site Details grid.

Note: The template sheet generated contain customized content applicable to the child nutrition program selected.

National School Lunch Program - Standard Sites									
Category	Site List			Status		Site Details			
Element	Site ID	Site Name	Include on Claim	Claim Status	Site Type	Group	Version	Breakfast (Severe Need)	Area Eligible
Required Field	Y	N	Y	N	N	N	N	N	N
Format	System Provided - Numeric	System Provided - Text	Yes/No	System Provided - Text	System Provided - Text	System Provided - Numeric	System Provided - Text	System Provided - Yes/No	System Provided - Yes/No

Attendance		Enrollment				Breakfast				
Total Attendance	Total Attendance Factor	Free	Reduced	Paid	Total	No. of Operating Days	Free	Reduced	Paid	Total
Y	N	Y	Y	Y	N	Y	Y	Y	Y	N
Numeric	Percentage	Numeric	Numeric	Numeric	System Calculated - Numeric	Numeric	Numeric	Numeric	Numeric	System Calculated - Numeric

NOTE: Fields that are provided by the system are shaded in gray on the template. These fields should NOT be populated by the user. Each claim type contains a customized template.

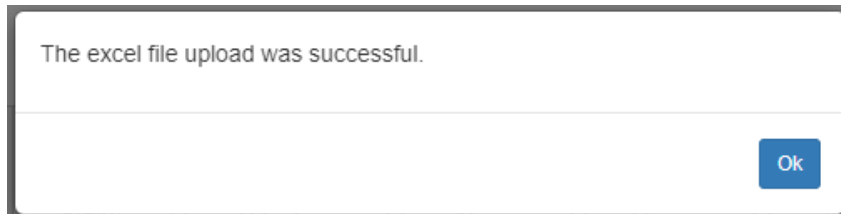
9. Populate data in the template. Save the file in your local folder.

Upload Data

10. Locate the **Upload** button above the site grid, click on it, then select the saved file from your local folder. NOTE: Importing data will overwrite all existing data for that collection.

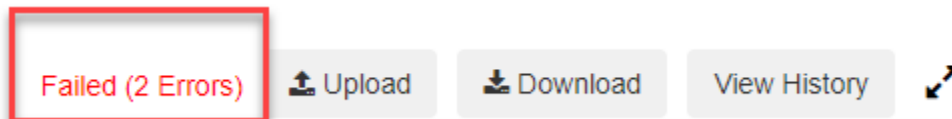
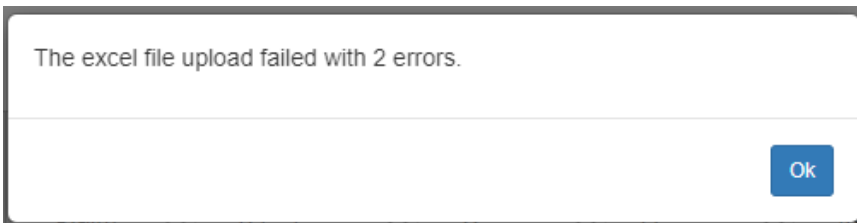
Successful upload:

Upon successful upload, Orchard will provide the message “The excel file upload was successful.” The Site Details screen will automatically refresh with imported data.



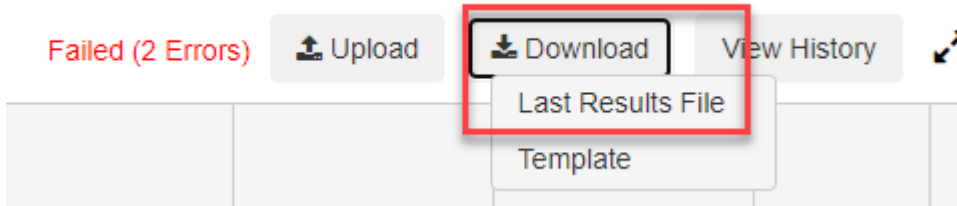
Error upload:

If there are errors, a message will popup indicating the number of errors. In addition, users will be able to view the number of errors above the Site Details grid.



Resolve Errors

To view the erroneous records, click on the Download button again and select "Last Result File."



The system will download the processed file. Open the file and scroll to the right until you reach the column that includes the error messages. Review the errors and fix the data accordingly. Save the file and upload the data file in the Site Details section of the claim.

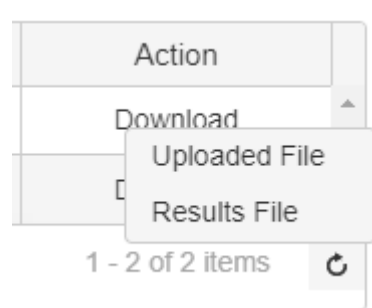
View Historical Uploads

11. The Orchard claims module will provide you with a View History button for that particular collection. Click on the button and the Orchard claims module will display a window with all update attempts. Every time the user uploads a data file for the collection, the upload efforts will be logged in and can be viewed via this window.

File Name	Last Uploaded Status	Uploaded Date	Uploaded By	Action
NSLP Claim Template - DCPS - Jan 2022 UAT.xlsx	Failed (2 Errors)	10/08/2022 12:10:36 PM	dcps@gmail.com	Download
NSLP Claim Template - DCPS - Jan 2022 UAT.xlsx	Success	10/08/2022 12:10:02 PM	dcps@gmail.com	Download

10 items per page 1 - 2 of 2 items

12. To view the file that was uploaded as part of each attempt, click on the Download button and select Uploaded File. In order to view the processed file provided after each upload attempt select the "Result File."



Claim (Aggregate and Summaries)

13. Once users complete the required fields on the **Site Details** section, they can navigate to the **Claim**

section via the left navigation to find the system breakdown and calculations for the claims reimbursements.

Claim Details

Total Monthly Attendance: 1145
 Average Daily Attendance: 38

Certified performance-based menu: No
 Two cent differential reimbursement: No

Summary Counts by Meal Types

Meal Type	No. of Sites	Enrollment	No. of Operating Days	Avg. Daily Participation
Breakfast	22	3780	30	78
Breakfast (Severe Need)	0	0	0	0
Lunch	22	3780	30	78
Snack / Supplement	0	0	0	0
Area Eligible Snack	22	2000	30	25

Version 1.0 Reimbursement by Meal Type

Meal Type	Total Month Reimbursement	Version Reimbursement	Claim Deduction
Breakfast	\$4,496.66	\$4,496.66	\$0.00
Lunch	\$8,332.89	\$8,332.89	\$0.00
Snack / Supplement	\$759.00	\$759.00	\$0.00

Meal Type Reimbursement

Meal Type	Free			Reduced			Paid			Total Meals	Total Amount
	Meals Served	Rates	Amount	Meals Served	Rates	Amount	Meals Served	Rates	Amount		
Breakfast	2269	\$1.97	\$4,469.93	0	\$1.67	\$0.00	81	\$0.33	\$26.73	2350	\$4,496.66
Breakfast (Severe Need)	0	\$2.35	\$0.00	0	\$2.05	\$0.00	0	\$0.33	\$0.00	0	\$0.00
Lunch	2269	\$3.66	\$8,304.54	0	\$3.26	\$0.00	81	\$0.35	\$28.35	2350	\$8,332.89
Snack / Supplement	0	\$1.00	\$0.00	0	\$0.50	\$0.00	0	\$0.09	\$0.00	0	\$0.00
Area Eligible Snack	759	\$1.00	\$759.00							759	\$759.00

14. Some claims may have additional tabs within this section that include more granular breakdowns for the meal counts and reimbursements.

Documents

15. The **Documents** section provides users with the ability to upload supporting documents by selecting the “Add New” documents option and selecting the appropriate document type.

Documents




No documents are required at this time.

Document Type

- Select
- Attendance Records
- Edit Checks
- Invoices
- Late exemption justification
- Menu
- Point of Service Documents
- Production Records
- Receipts
- Misc.

16. The user will have three icons available in the **Documents** column.

- **Paperclip** allows users to attach a file
- **Magnifying Glass** allows users to view the attached document
- **Trash Can** provides users the ability to delete a file

Documents				
Document Type	Uploaded Date	Document	Reviewer Comments	Verification ?
1. Invoices	7/26/2022	  		Pending Review ? 7/26/2022

Confirm and Accept

17. An **Authorized Signer** must acknowledge and certify the statements in the **Confirm and Accept** section when submitting the claim to the State Agency (SA) for review.

NOTE: Authorized Signer(s) are identified on the corresponding CNP applications. The system automatically assigns user credentials for authorized signers upon approval of the application. The system will only allow authorized signers to submit claims to the SA for review.

Claim | FY: 2022 | Not Submitted

Confirm and Accept

Acknowledge and certify your agreement to the statements below by checking the corresponding boxes:

I certify that this claim is true and correct, that records are available to support the information reported and that it is in accordance with the terms for the existing agreement. I recognize that I will be fully responsible for any excess amounts which may result from erroneous or neglectful reporting herein. I am aware that deliberate misrepresentation or withholding of information may result in prosecution under applicable state and federal statutes.

I certify that all receipts, invoices and other evidence of purchase must be retained and available for future audits for a period of five years after the date of the final submission of the final claim for the fiscal year to which they pertain, or longer if related to an audit or investigation in progress.

I certify that all claims for reimbursement will be submitted in accordance with the State Agency established deadlines and no later than the USDA regulated 60 day guidelines. I understand that claims not submitted within 60 calendar days shall not be paid with program funds unless FNS determines that an exception should be granted or is otherwise authorized by FNS. [7 CFR§210.8(b)(1), §215.10(b), §220.11(b), §225.9(d)(6), §226.10(e).]

Comments / Notes:

SA Determination

18. The **SA Determination** section is completed by the SA Claim Specialist during review and approval process.

Claim | FY: 2022 | Not Submitted

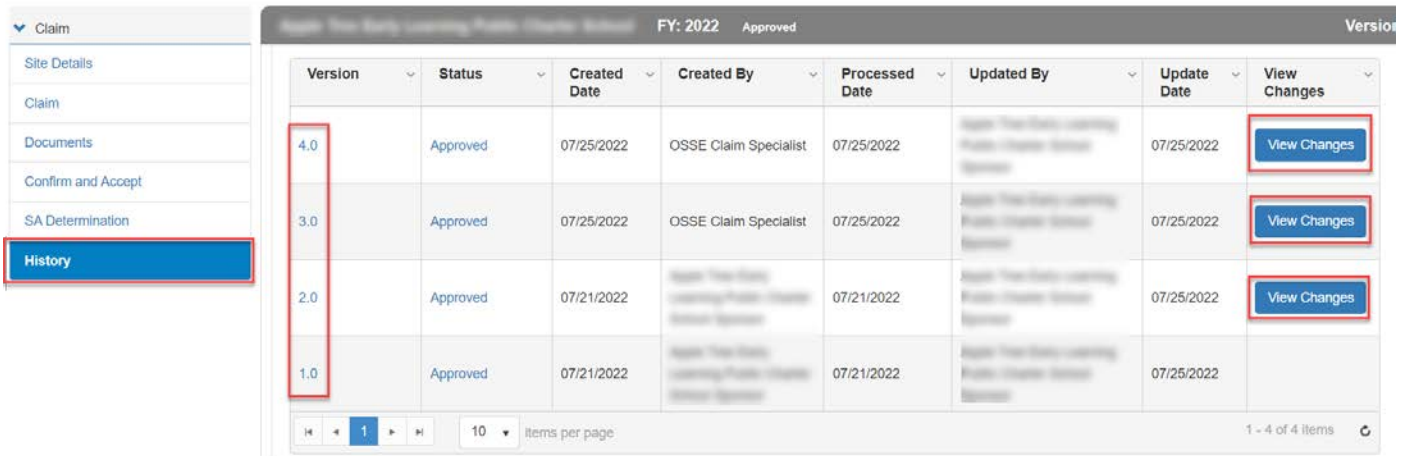
SA Determination

Fund Disbursement ?

Claim Payment Type	Total Month Reimbursement	Version 1.0 Reimbursement
Breakfast	\$4,496.66	\$4,496.66
Lunch	\$8,332.89	\$8,332.89
Snack / Supplement	\$759.00	\$759.00
Total:	\$13,588.55	\$13,588.55

History

19. The **History** section provides users with the ability to view the different versions that have been created for a specific claim.
20. Users can **View Changes** from one version to the next by clicking the **View Changes** option.
21. Users can navigate back to prior versions by clicking on the **Version** number hyperlink.



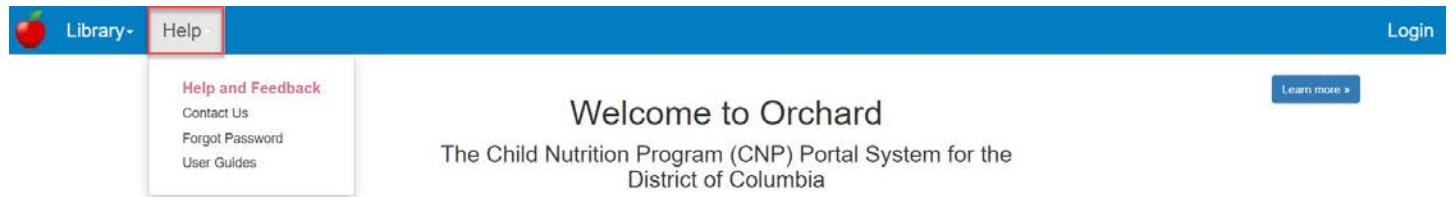
The screenshot shows the 'History' section of the Orchard system. On the left is a navigation menu with 'History' highlighted. The main area displays a table of claim versions for 'Claim: Health Care Work Reporting - Public - District of Columbia' for 'FY: 2022' with a status of 'Approved'. The table has columns for Version, Status, Created Date, Created By, Processed Date, Updated By, and Update Date. Each row includes a 'View Changes' button. The 'Version' column contains hyperlinks for 4.0, 3.0, 2.0, and 1.0. The 'Created By' and 'Updated By' columns list 'OSSE Claim Specialist'. The 'Update Date' column shows dates from 07/21/2022 to 07/25/2022. At the bottom, there is a pagination control showing '1' of 4 items per page.

Version	Status	Created Date	Created By	Processed Date	Updated By	Update Date	View Changes
4.0	Approved	07/25/2022	OSSE Claim Specialist	07/25/2022	Health Care Work Reporting - Public - District of Columbia	07/25/2022	View Changes
3.0	Approved	07/25/2022	OSSE Claim Specialist	07/25/2022	Health Care Work Reporting - Public - District of Columbia	07/25/2022	View Changes
2.0	Approved	07/21/2022	OSSE Claim Specialist	07/21/2022	Health Care Work Reporting - Public - District of Columbia	07/25/2022	View Changes
1.0	Approved	07/21/2022	OSSE Claim Specialist	07/21/2022	Health Care Work Reporting - Public - District of Columbia	07/25/2022	

Help

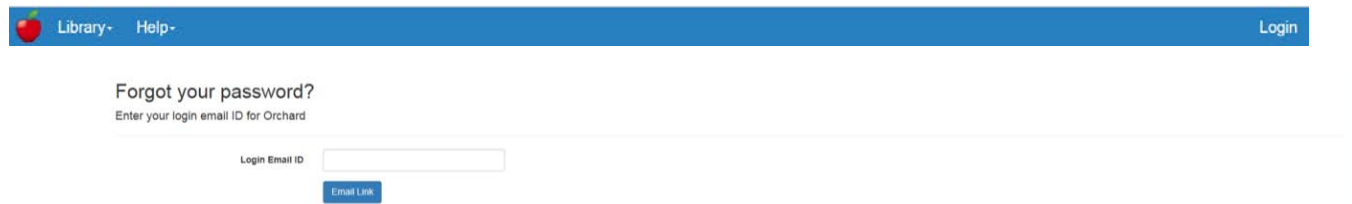


Note: Orchard users do not need to be logged in to access the Help menu options



The screenshot shows the Orchard system's Help menu. The 'Help' menu item is highlighted, and a dropdown menu is visible with options: 'Help and Feedback', 'Contact Us', 'Forgot Password', and 'User Guides'. The main content area displays 'Welcome to Orchard' and 'The Child Nutrition Program (CNP) Portal System for the District of Columbia'. A 'Login' button is in the top right, and a 'Learn more' button is in the top right of the main content area.

1. Click **Help** then [Forgot Password](#) to reset your current Orchard password.



The screenshot shows the 'Forgot your password?' form. The form title is 'Forgot your password?' and the subtitle is 'Enter your login email ID for Orchard'. There is a text input field labeled 'Login Email ID' and a blue 'Email Link' button below it.

2. Click **Help** then [Contact Us](#) to see a list of Orchard application specialists' phone numbers and email addresses. All program and system related questions should be directed to the assigned program specialist and or claims specialist for resolution.