

Require Receipt Entry

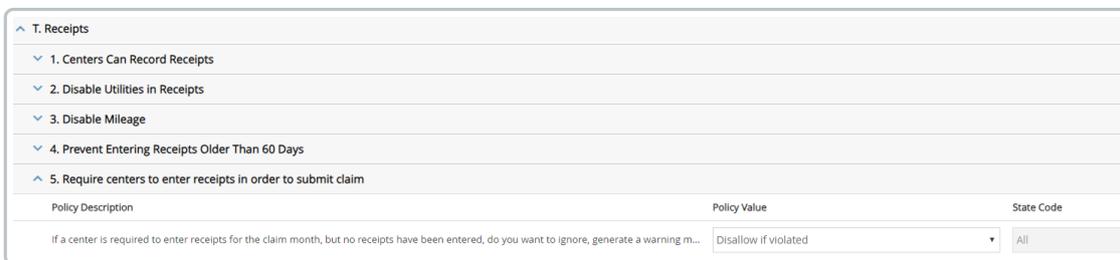
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CDT

Sponsors have the ability to require receipt entry for one, multiple, or all of their sites. In order to set this up you will need to follow the steps below.

Update Receipt Policy

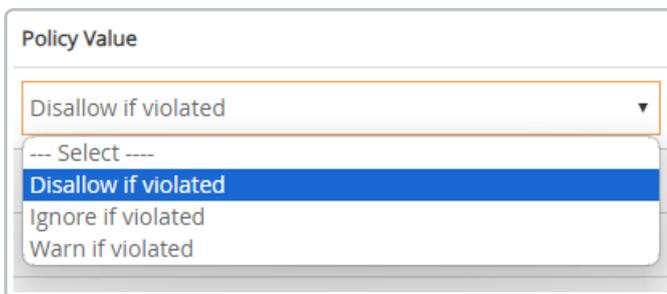
The first step is to ensure the policy is set the way you want it.

1. From the menu to the left, click Administration.
2. Select Manage Policies. The policies screen loads.
3. Click on the  to expand Section **T. Receipts** and **5. Require centers to enter receipts in order to submit claim.**



Policy Description	Policy Value	State Code
If a center is required to enter receipts for the claim month, but no receipts have been entered, do you want to ignore, generate a warning m...	Disallow if violated	All

4. Choose the **Policy Value** that works best for your organization:
 - a. **Ignore if violated:** If receipts are not entered for a site that requires receipt entry, nothing will happen and no errors will show.
 - b. **Warn if violated:** If receipts are not entered for a site that requires receipt entry, a warning will appear on the office error report, but no meals will be disallowed.
 - c. **Disallow if violated:** If receipts are not entered for a site that requires receipt entry, a disallow error will appear on the office error report and the claim will be zeroed out. The claim can be sent back to the center to enter receipts, or sponsor can enter receipts on their behalf. Once receipts are entered, the claim can be reprocessed and the error will clear.



Policy Value

Disallow if violated

--- Select ---

Disallow if violated

Ignore if violated

Warn if violated

5. Scroll back to the top of the page, click **Save**.

Update Center Setting

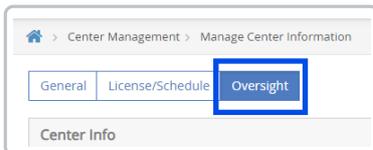
This step will need to be repeated for each site receipts are required for:

1. From the menu to the left, click **Center Management**.
2. Select **Manage Center Information**.
3. Select the center in the dropdown box located in the top right corner of the screen. The **Center Information** screen loads.



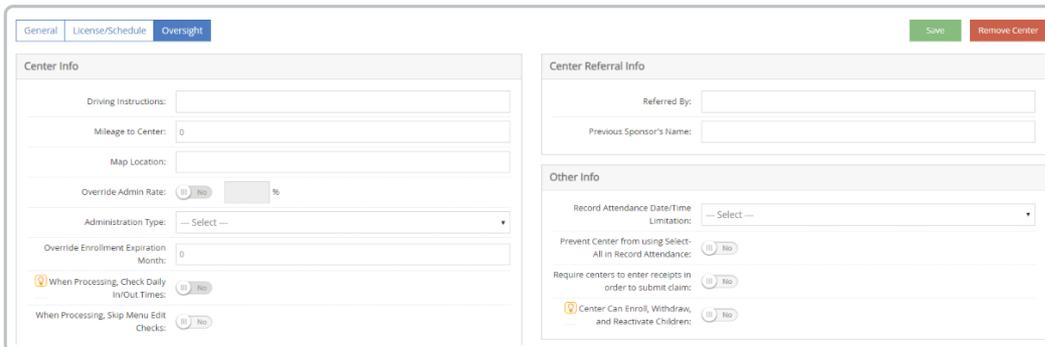
The screenshot shows the 'Manage Center Information' page. At the top right, a dropdown menu is open, displaying 'Peppa's Play Yard TX #9999 (#1234)'. Below the dropdown, there are three tabs: 'General', 'License/Schedule', and 'Oversight'. The 'Center Info' and 'Center Referral Info' sections are visible below the tabs.

4. Choose the **Oversight** tab.



The screenshot shows the 'Manage Center Information' page with the 'Oversight' tab selected and highlighted with a blue box. The 'Center Info' section is visible below the tabs.

5. In the section names **Other Info**, toggle **Require centers to enter receipts in order to submit claim** to **Yes**.



The screenshot shows the 'Manage Center Information' page with the 'Oversight' tab selected. The 'Center Info' and 'Center Referral Info' sections are visible. The 'Other Info' section is expanded, showing several toggle switches. The 'Require centers to enter receipts in order to submit claim' toggle is checked, indicating it is set to 'Yes'. Other toggles include 'Prevent Center from using Select-All in Record Attendance' (unchecked), 'When Processing, Check Daily In/Out Times' (unchecked), and 'Center Can Enroll, Withdraw, and Reactivate Children' (checked). There are also 'Save' and 'Remove Center' buttons at the top right.

6. Click **Save**.