WINS

WASHINGTON INTEGRATED NUTRITION SYSTEM

WINS Training

Phase 2: WINS Claims and Sponsor Accounts School Meal Programs

Job Aids

Contents

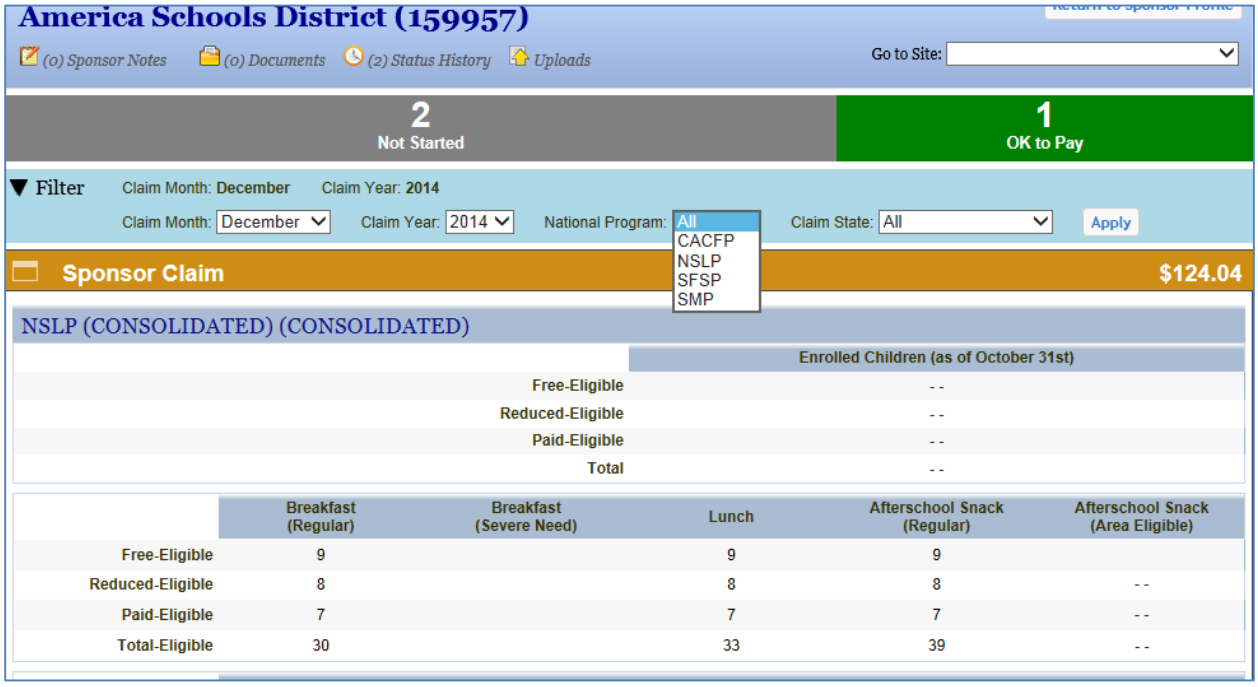
Claims Navigation in WINS 1
Entering Claims and Reviewing Accounts 4
School Meal Programs 6
Claim Set-up: Change Site Claiming Option 7
School Meal Programs: Enter a New Claim 11
School Meal Programs: Editing a Claim 14
WINS Month-end Payment Process 15
Review Account Information 16
Revise a Claim 20
Online Help and Job Aids 25

Claims Navigation in WINS

1

2

3



Claim Status bar (1)

- Below the sponsor's name, you will see the Claim Status bar which will display the number of sites for this sponsor and the current status of each site's claim. For example, if you have not started this claim, you will see the number of sites and the status "not started" or if you have completed 1 site claim, you will see 1 "ok to pay" and 2 "not started."

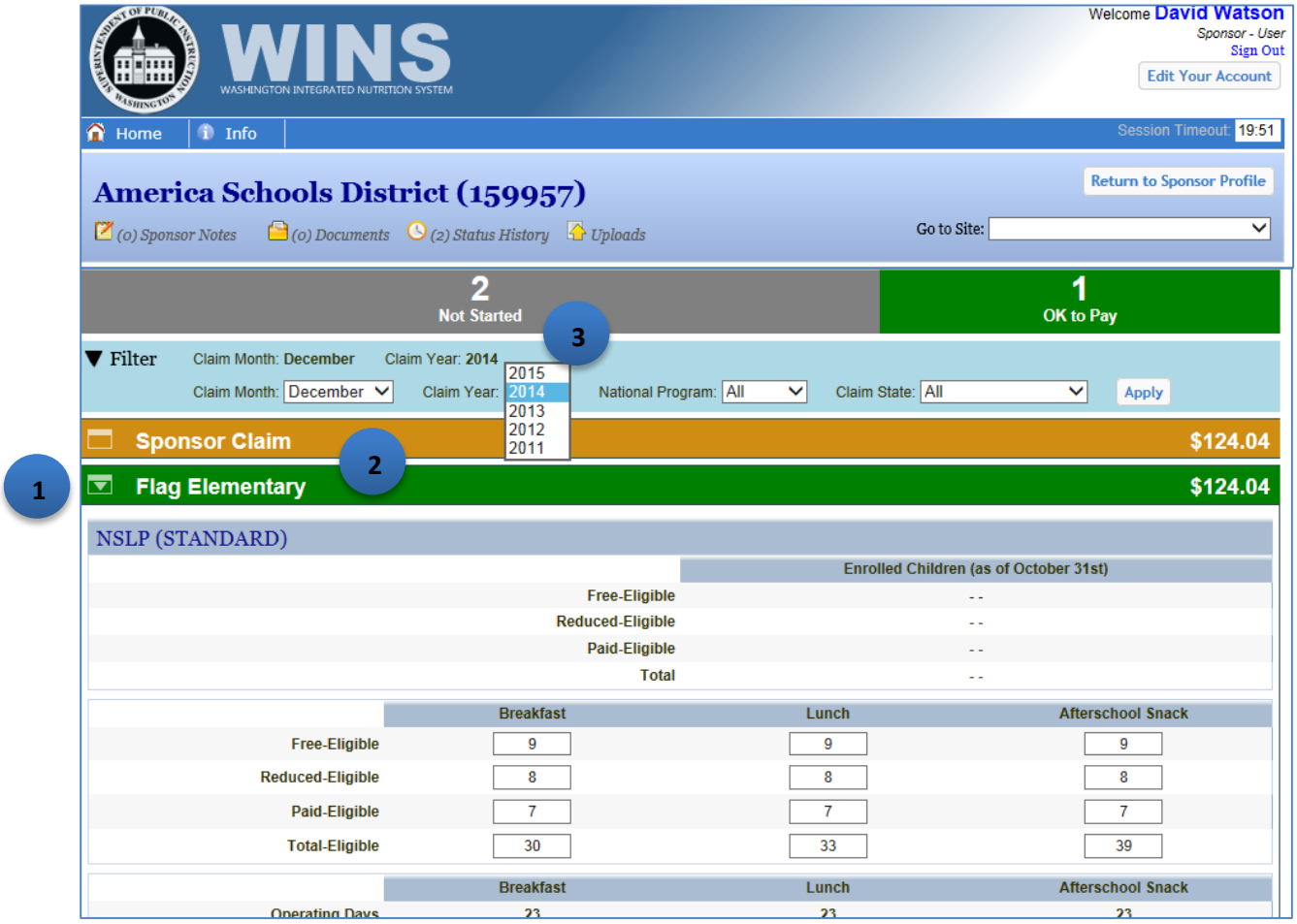
Claim Filter bar (2)

- Below the Claim Status bar is the Claim Filter bar. WINS is set to default to Claim Month and Claim Year. By clicking on Filter, you have the option to select additional criteria such as program and claim status.

Sponsor Claim bar (3)

- The Sponsor Claim bar displays roll up/summary information from all site data entered. The bar changes color depending on the status of the sponsor's summarized claim data. The sponsor claim roll up will show meal count totals and the expected claim payment for all site data entered. This is view only.

Claims Navigation in WINS (cont.)



Site Claim Bar (1)

- When you click on the Site Claim bar, the screen expands to show the data entry fields required to claim for that site.

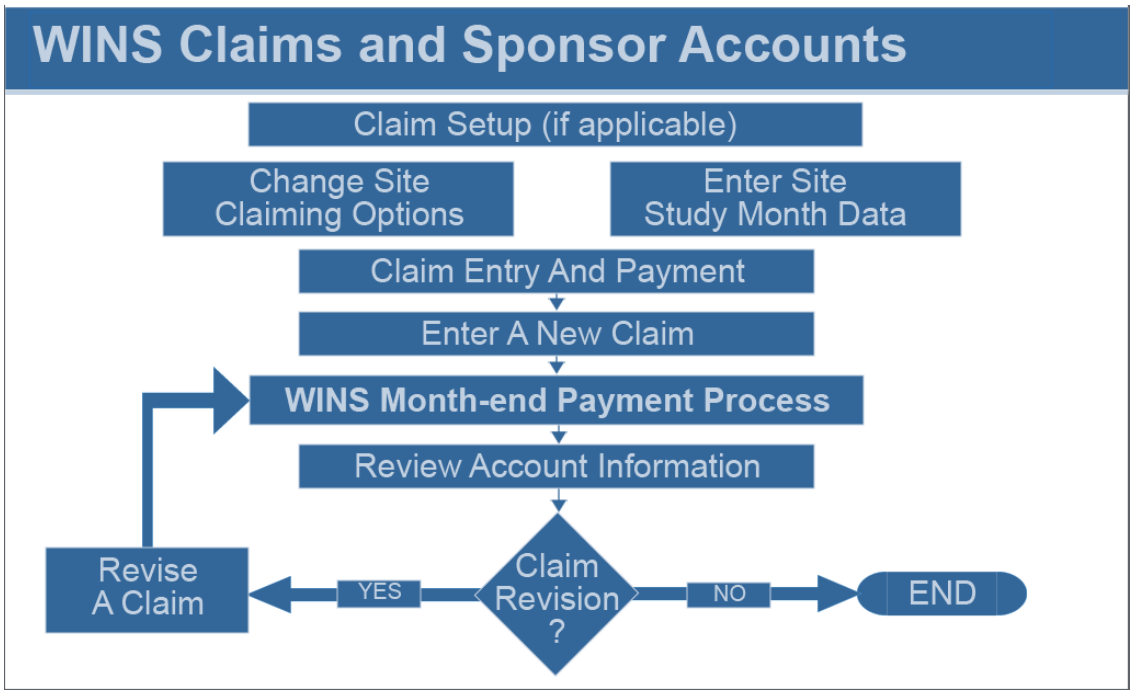
Color Codes (2)

- The colors of the different bars will change based upon the status of the data entered.
  Grey = Not Started
  Green = OK to Pay
  Dark Blue = Paid
  Red = In Error
  Orange = Partially OK to Pay

Display Year (3)

- The default display year is the current calendar year. You can use the drop-down to display claims for other calendar years as needed.

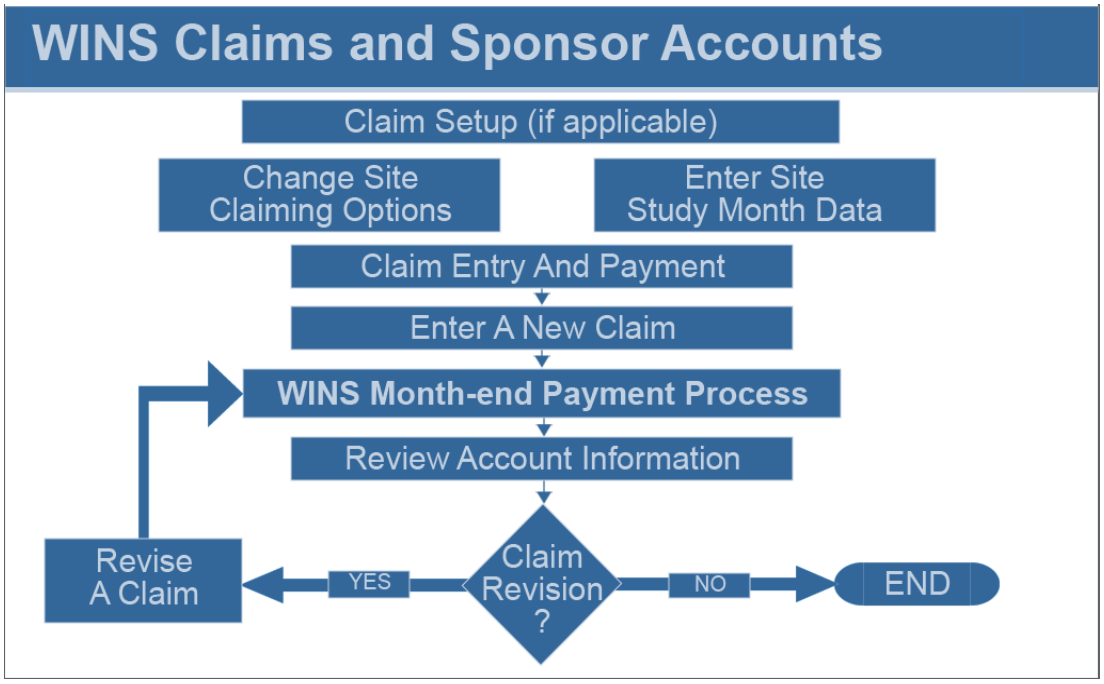
Entering Claims and Reviewing Accounts



Claim Setup

If you participate in School Meal Programs, you can:	**Change Site Claiming Option –** Most sponsors of School Meal Programs use the "Standard" claiming option. When appropriate, you can submit a request to OSPI to have your claiming option changed from "Standard" to "Provision 2" or "Community Eligibility Provision".
If you participate in CACFP Meal Programs, you must:	**Enter Site Study Month Data –** At the beginning of each program year, sponsors participating in CACFP Meal Programs must provide information about the number of children eligible for free and reduced price meals. This is used to establish the percentage of meals to be paid in each category for the upcoming program year.

Entering Claims and Reviewing Accounts (cont.)



Claim Entry and Payment

Enter a New Claim

Sponsors will select the month they are entering claim data for and enter the information, by site into the WINS claim form. The claim data is edited by the system as it is entered and errors are shown in real-time.

WINS Month-end Payment Process

Each month, payments are processed by OSPI through a WINS Month-end Payment Process. This is an automated process in WINS. If claim data has been entered and is 'OK to Pay', the claim will be processed and payment sent to the sponsor at the end of the month.

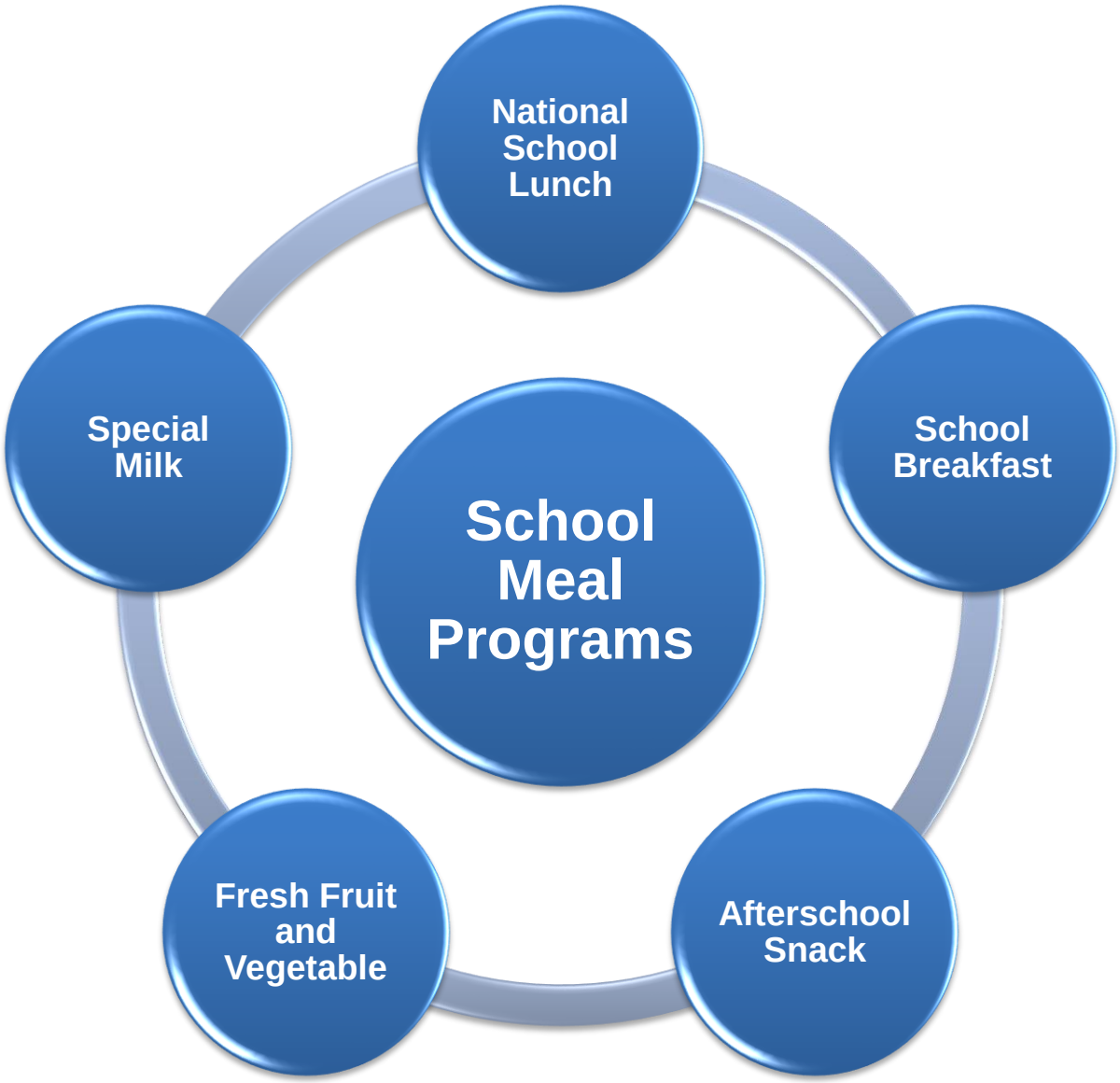
Review Account Information

Before the WINS Month-end Payment Process runs, you can review your account information to see the estimated payment for claims you have entered. After the WINS Month-end Payment Process has run, you can review the payment details and summary of earnings.

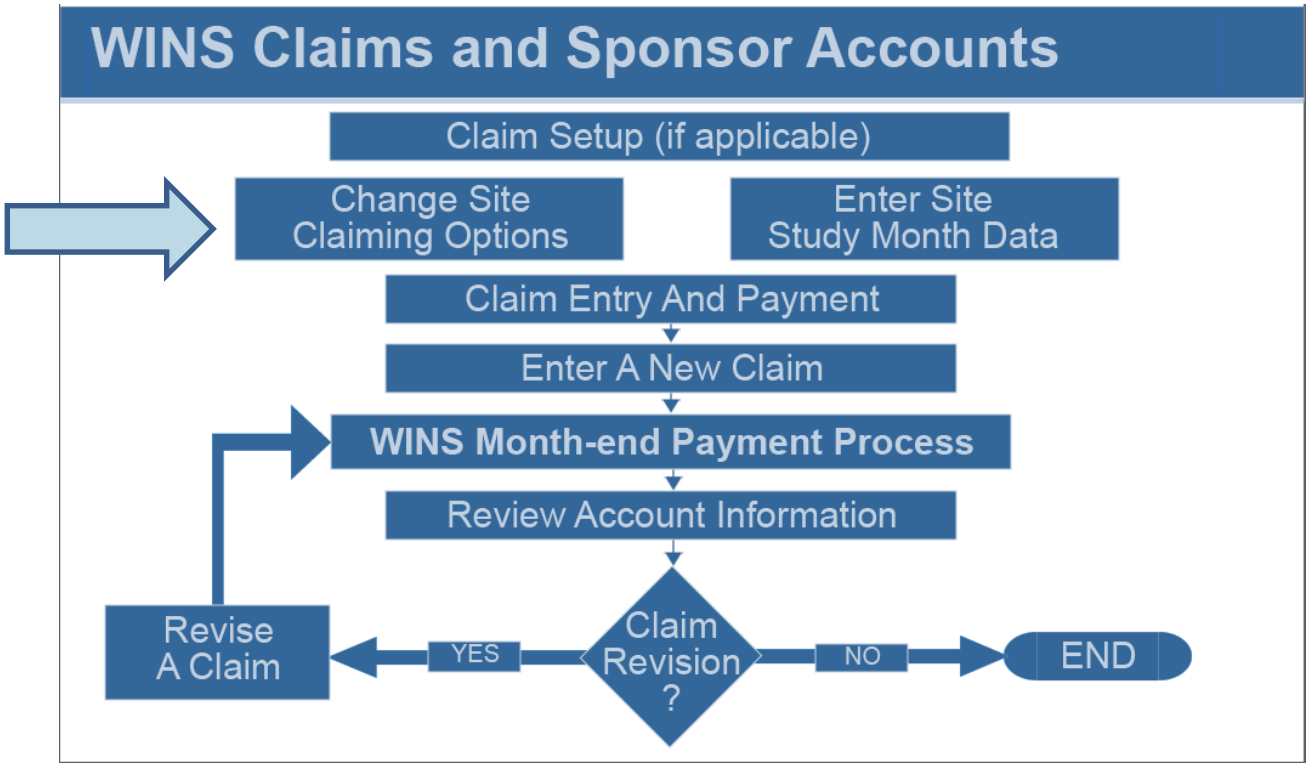
Revise a Claim

If a previous claim needs to be revised, you can select that claim and update the claim data. This can result in an increase or a decrease in the amount paid. A claim can only be revised upward (to increase your payment) within 60 days after the month claimed. A claim can be revised downward (to decrease your payment) at any time. If a claim is revised downward, an account receivable will be set up to recover the amount you were overpaid from future payments.

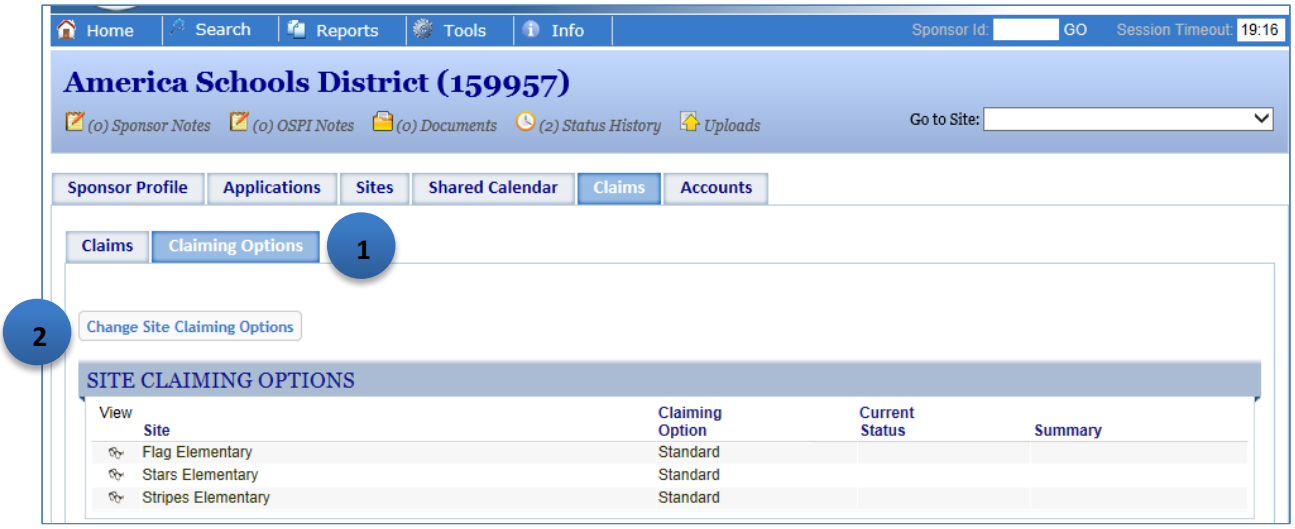
School Meal Programs



Claim Set-up: Change Site Claiming Option



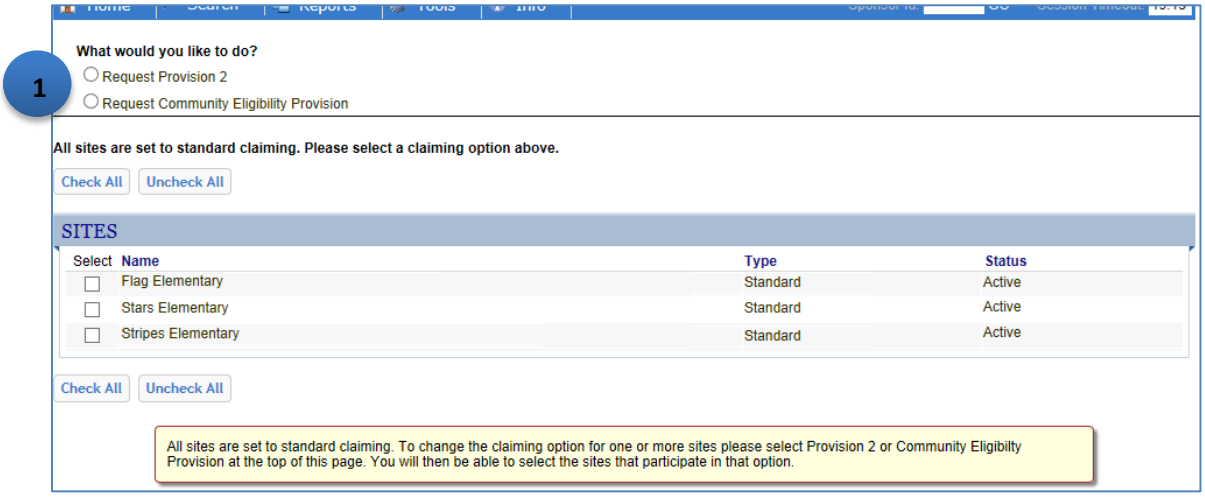
Claim Set-up: Change Site Claiming Option (cont.)



Change Site Claiming Option

- **NOTE**: A request to change your claiming option should be submitted prior to the school year in which you intend to start the new claiming option. An OSPI specialist will provide you with additional details after your request has been made.
- From the Claims tab, click the Claiming Options tab (1).
- The Claiming Options screen will open and display all of the sites and their current claiming options.
- Click the Change Site Claiming Options button (2) if you want to make a change.
- The screen will open and you will be asked, “What would you like to do?” You have two choices: ’Provision 2’ and ‘Community Eligibility Provision’.

Claim Set-up: Change Site Claiming Option (cont.)



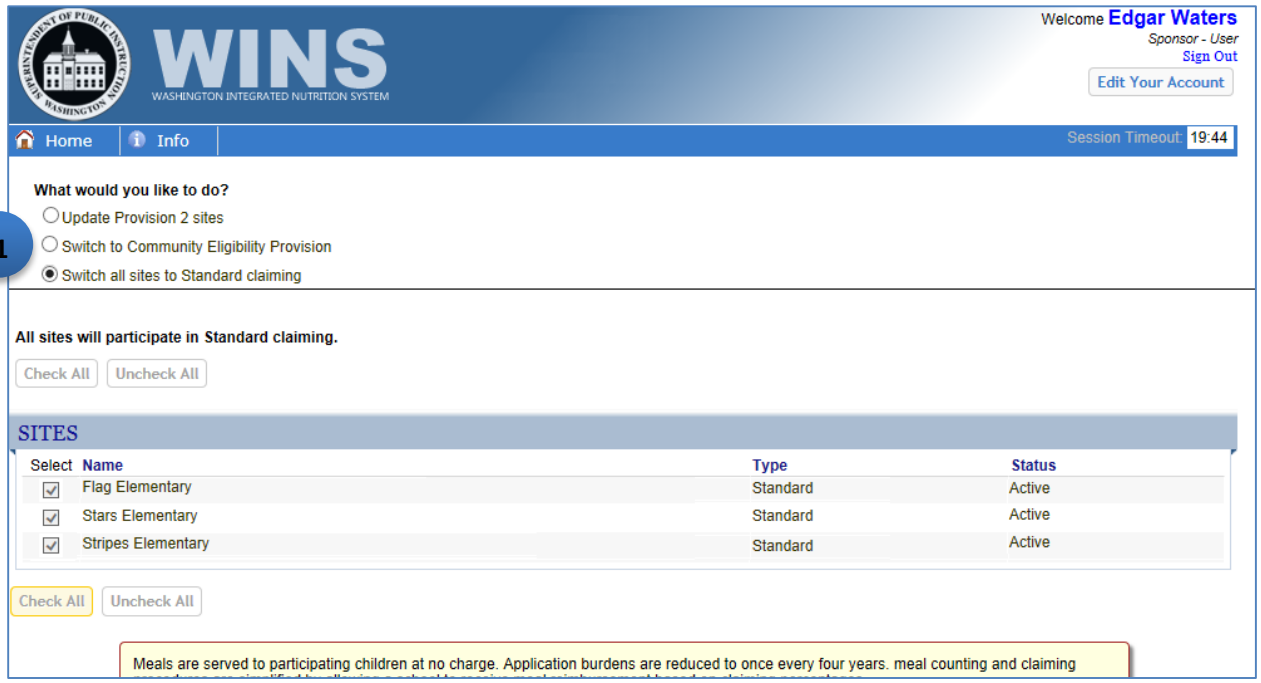
Provision 2

- Click the button next to Request Provision 2 (1). You can then select one or more sites by either clicking the checkbox next to the site(s) or clicking the Check All button.
  NOTE: At the bottom of the screen there is a text box explaining the Provision 2 site options.
- Once you have selected Provision 2 and selected the sites, click the Send Request to OSPI button. A notice will appear at the top of the Claiming Options screen and the status will show "pending"
- The request will be routed to an OSPI specialist. After review, you will be notified if the request has been approved or denied.

Community Eligibility Provision

- Click the button next to Request Community Eligibility Provision (1). Select one or more sites by either clicking the checkbox next to the site(s) or clicking the Check All button.
- Once you have selected the Community Eligibility Provision and selected the sites, click the Send Request to OSPI button. A notice will appear at the top of the Claiming Options screen and the status will show as "pending".
- The request will be routed to an OSPI specialist. After review, you will be notified if the request has been approved or denied.

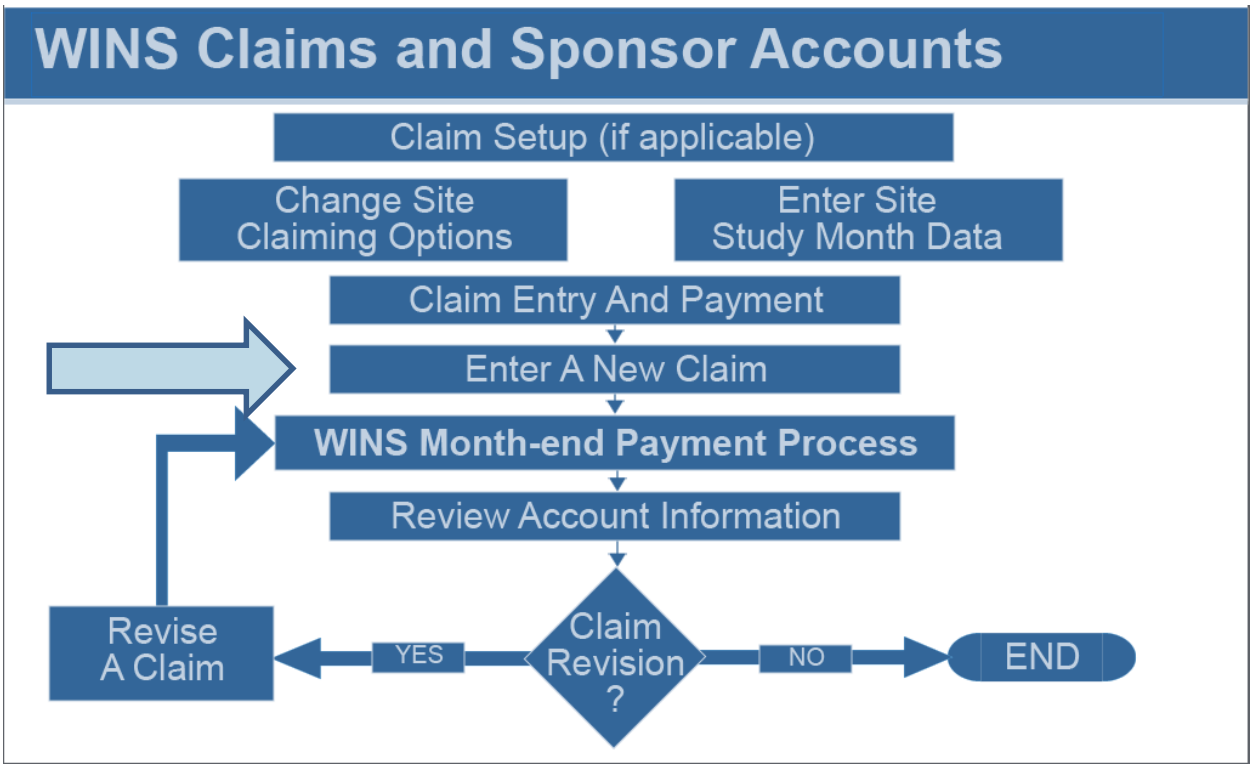
Claim Set-up: Change Site Claiming Option (cont.)



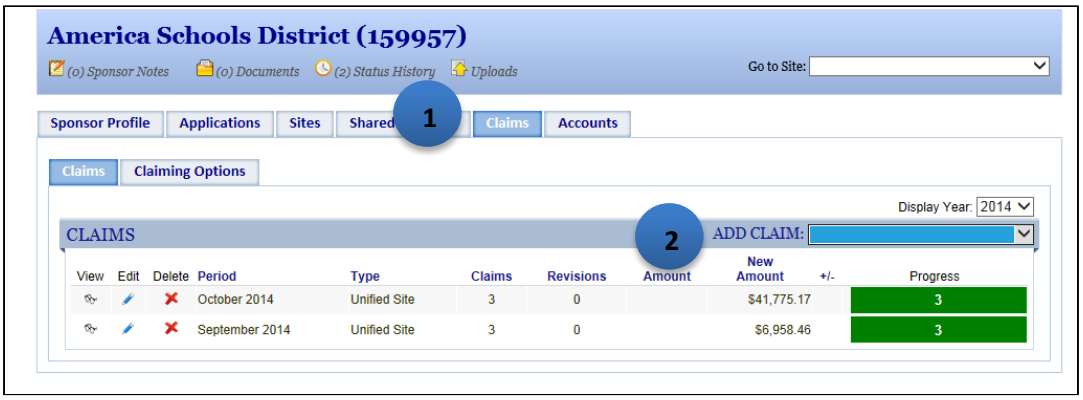
What if You Want to Switch Back to Standard?

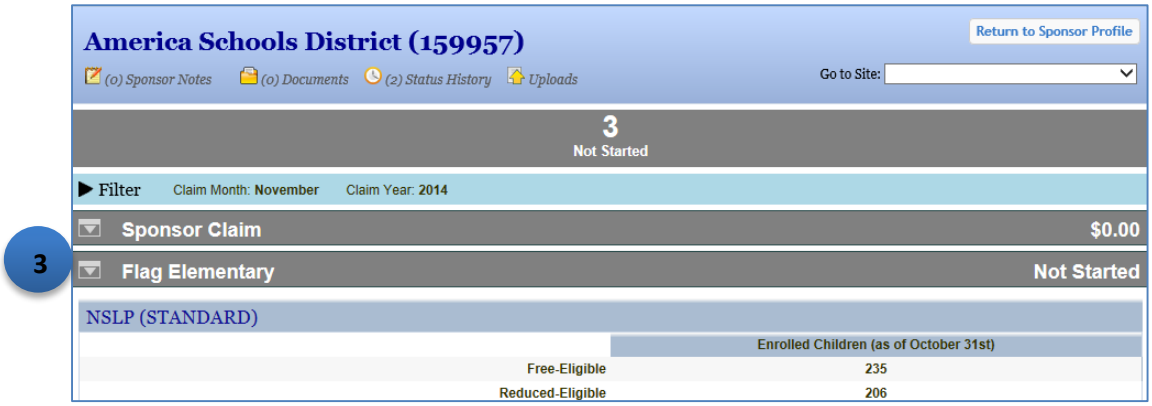
- If one or more of your sites are already set to Provision 2 or Community Eligibility Provision, you will see the option to switch to Standard claiming (1).
- You can select which sites you want to change, then click the button to submit the request to switch those sites to Standard claiming.
- A notice will appear at the top of the screen letting you know the request has been made.
- The request will be routed to an OSPI specialist. After review, you will be notified via email if the request has been approved or denied.

School Meal Programs: Enter a New Claim



School Meal Programs: Enter a New Claim (cont.)

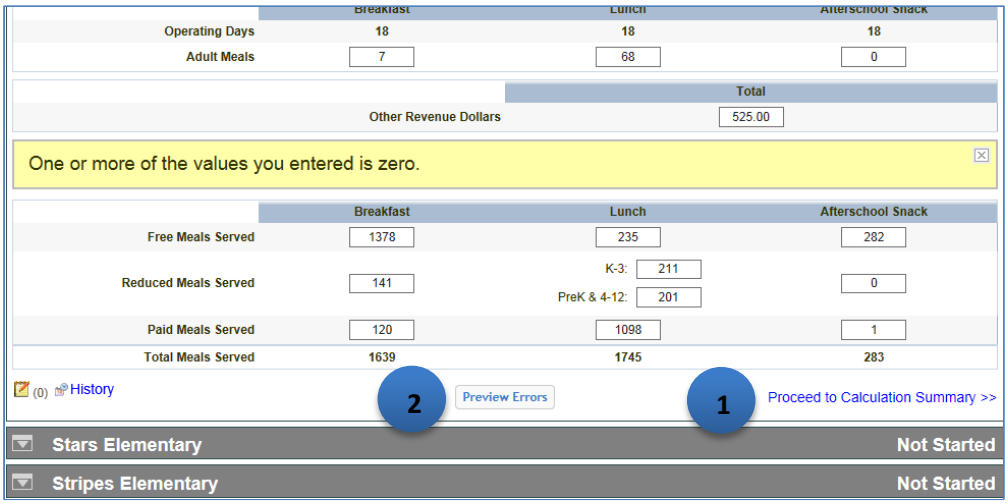


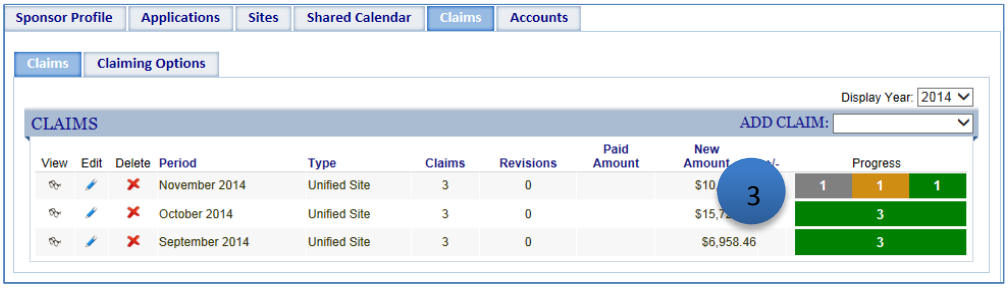


To Enter a New Claim

- Click the Claims tab (1).
- The Claims screen lists any claims already entered for the current year.
- To begin the entry of claim data, click the Add Claim drop-down in the Claims bar (2).
  Note: The drop-down will show you the months for which you are eligible to claim. Select the appropriate month.
- The screen displays a colored Site Claim bar with the name of each site and a Sponsor Claim roll up bar. All claim data must be entered at the site level. To enter claim data, click anywhere on the site Claim bar with the name of that site. You can work on sites in any order.
  Note: When you first enter a new claim, the Sponsor roll up will be grey and show zero totals (3) because you have not entered any site data. Once you have entered data for each site the Site Claim bar will change color to indicate progress status and the sponsor roll up will show you totals. This information is view only.
- When you click the Site Claim bar, the screen expands to show the data entry fields for that site.
  Note: If you click the bar for a different site, the first site will collapse and the screen will expand to show the data entry fields for the other site.
- Enter the appropriate data in each field. When you are done, click the Preview Errors button. If there are errors, they will display in red and must be fixed. If there are warning messages, they will display in yellow and do not need to be fixed but should be reviewed.

School Meal Programs: Enter a New Claim (cont.)





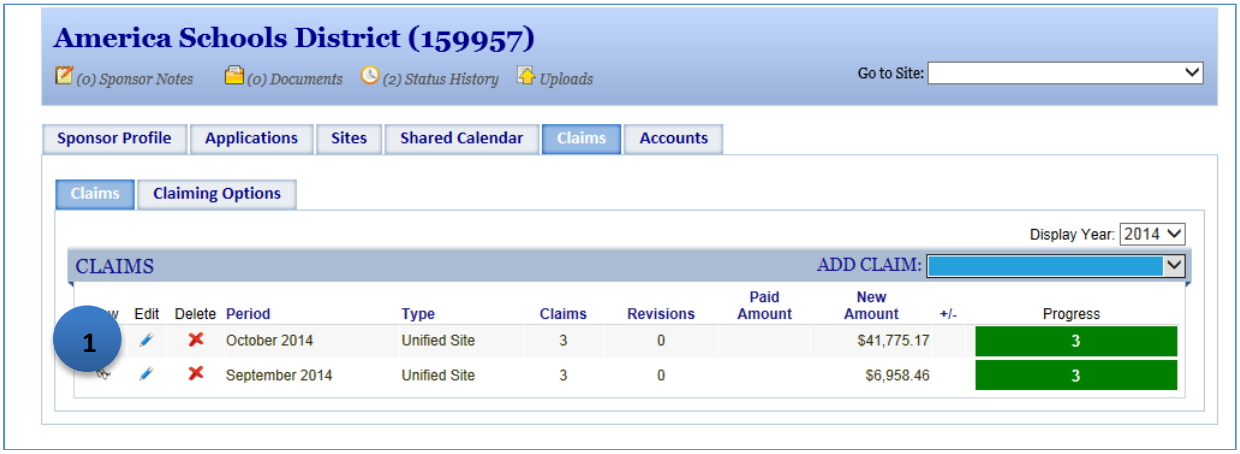
To Enter a New Claim (cont.)

- Once any errors have been corrected, a message will display that no errors are found. Click Proceed to Calculation Summary link (1) to calculate and save the claim amounts.
- The Claim Summary screen shows a detailed breakdown of the amounts to be paid. If there are no errors, the Claim Status bar at the top of the screen will show that one site is 'OK to Pay' and any other sites are 'Not Started'. To enter data for the next site, click anywhere on the grey Site Claim bar with that site's name.
- The data entry screen for this new site will be displayed. Repeat the same steps as before. Enter the appropriate data then click the Preview Errors button (2). When everything is OK, click the Proceed to Calculation Summary link.
- The Calculation Summary screen now shows a detailed breakdown of the claim amounts for the site. Once data has been entered for all sites, the Claim Status bar at top will show in green with the status of 'OK to Pay'. To return to the main Claims screen, click the Return to Sponsor Profile button.
- The Claims screen will show this new claim and the amount to be paid. The Claim Status bar will show as green, meaning it is 'OK to Pay', and the number of sites to be paid.
  Note: At the monthly cut off, all claims in 'OK to Pay' status will be automatically processed by WINS.

Other Statuses

- If one site is incomplete or has errors, the progress bar will show in red with the status of 'In Error'. At the monthly cut off, the claim for that site will not be processed.
- If one site has multiple programs (for example, School Breakfast and Lunch) and one of those programs is 'OK to Pay' and the other is 'In Error', the site will show in orange with the status of 'Partially OK to Pay'. At the monthly cut off, the program that is 'OK to Pay' will be processed and the program that is 'In Error' will not.

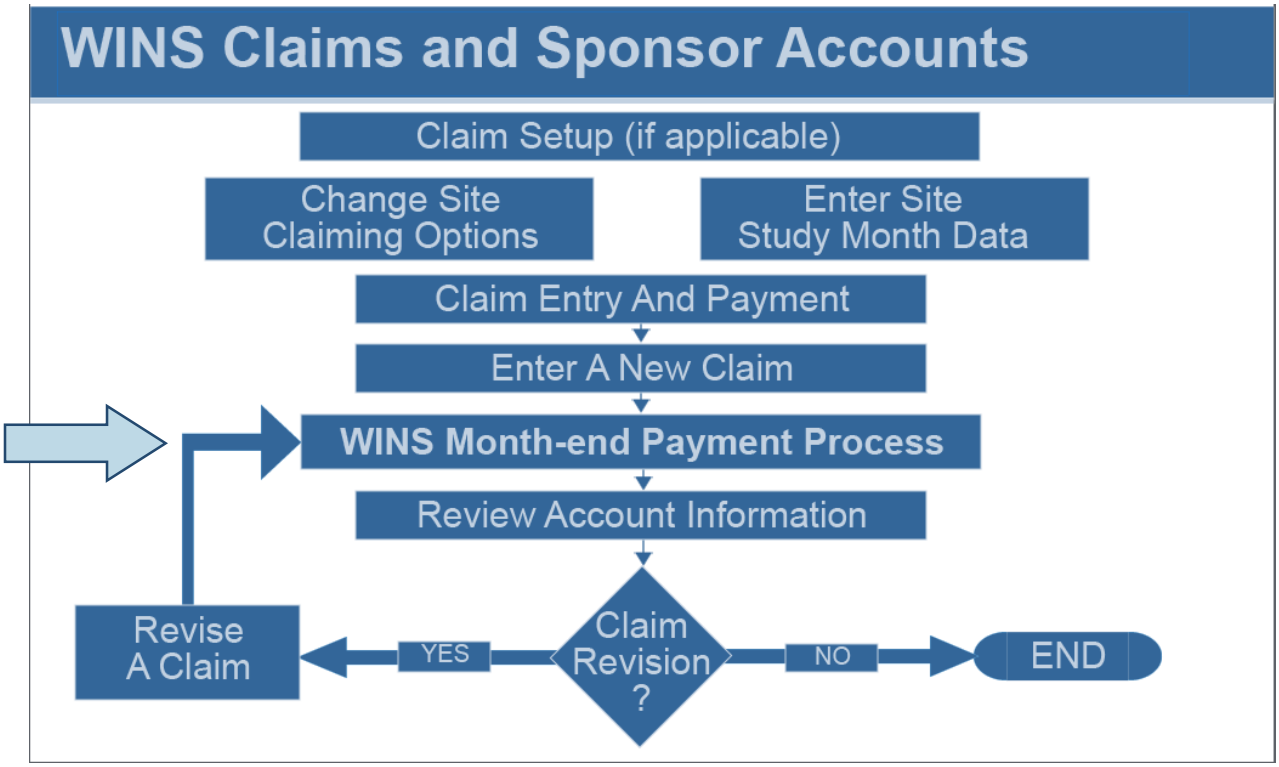
School Meal Programs: Editing a Claim



Editing a Claim

- To edit an existing claim, click the Edit icon (1) for the claim month you need to edit.
- Follow the steps for entering new claim data. Make any updates to the claim data as needed, then click the Preview Errors button. When any errors have been resolved, click the Proceed to Calculation Summary link.
- The Claims Summary screen shows a detailed breakdown of the claim – for a NSLP claim, it may show the base claim amounts, state funded amounts, and information about meal pattern certification.
- To return to the main Claims screen, click the Return to Sponsor Profile button or the Close button.
- The Edit icon will be displayed for claims that have not yet been through a WINS Month-end Payment Process. If the claim has already been through a WINS Month-end Payment Process, then the Edit icon will not be shown and the Revise icon will be displayed for sponsors to update or add information to a previously processed claim.

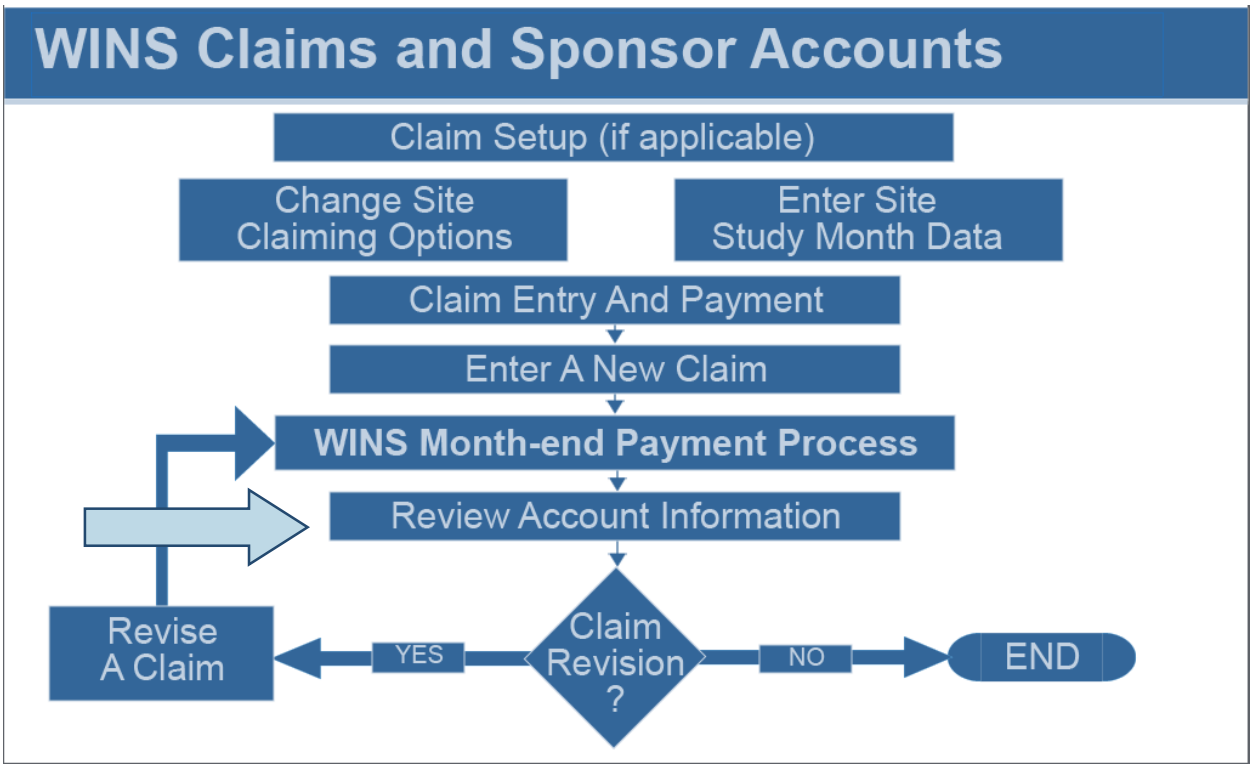
WINS Month-end Payment Process



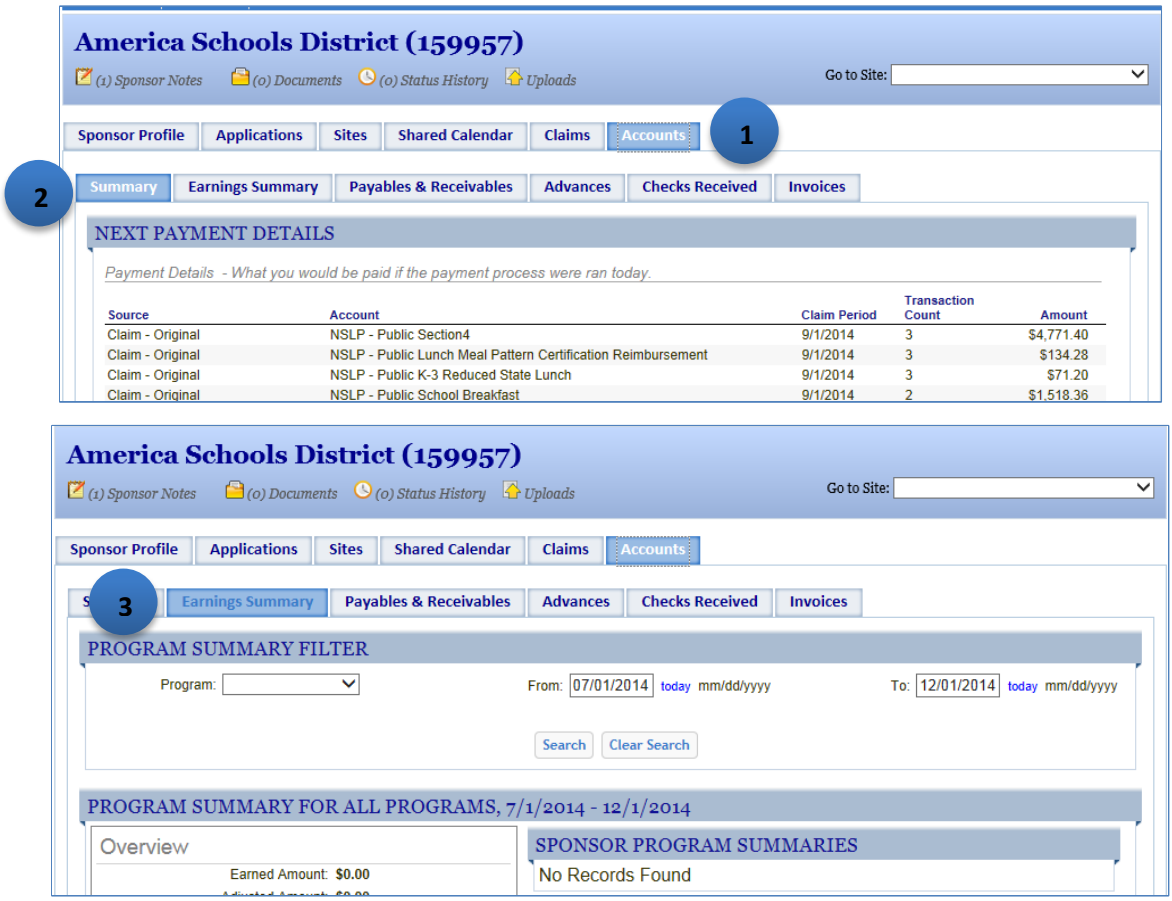
WINS Month end Payment Process

- Any claims that have been entered and have a status of 'OK to Pay' will be processed during the WINS Month-end Payment Process.
- This is an automated process in WINS. If claim data has been entered and is 'OK to Pay', the claim will be processed and payment sent to the sponsor at the end of the month.
- If one site is incomplete or has errors, the progress bar will show in red with the status of 'In Error'. At the monthly cut off, the claim for that site will not be processed.
- If one site has multiple programs (for example, School Breakfast and Lunch) and one of those programs is 'OK to Pay' and the other is 'In Error', the site will show in orange with the status of 'Partially OK to Pay'. At the monthly cut off, the program that is 'OK to Pay' will be processed and the program that is 'In Error' will not.
- After the WINS Month-end Payment Process has been completed, information under the Accounts tab will include details of upcoming WINS payments.

Review Account Information



Review Account Information (cont.)



Accounts (1)

- The Accounts tab provides claim information such as a claim summary, earnings summary, payables and receivables, advances, checks received and invoices. Sponsors are encouraged to view the information to better understand the components that determine the actual payment amount provided each month.

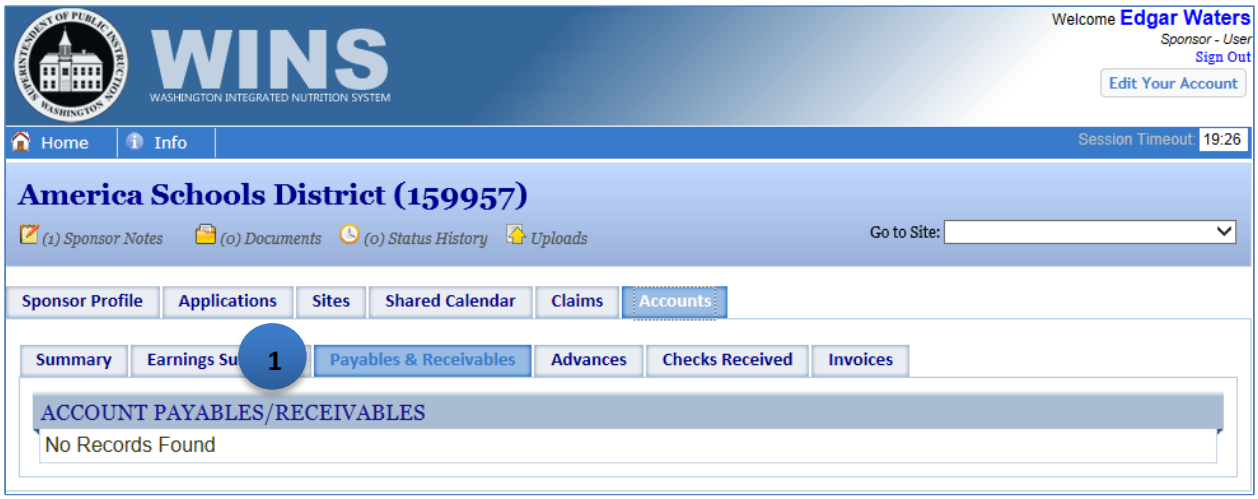
Summary (2)

- The Summary screen provides details about the next payment and details about past payments.
- The Next Payment Details section outlines the anticipated payment the sponsor is expected to receive based upon the claim data entered thus far. It is an estimate of the expected payment for claims data entered, but not yet processed.
- The Previous Payment Details section outlines past payments made by WINS. Users can select the month and view all the payment details for that specific monthly WINS payment cycle.

Earnings Summary (3)

- The Earnings Summary screen provides a summary of prior WINS earnings based on the filter criteria selected. Users may filter by program, as well as 'from' and 'to' dates.

Review Account Information (cont.)



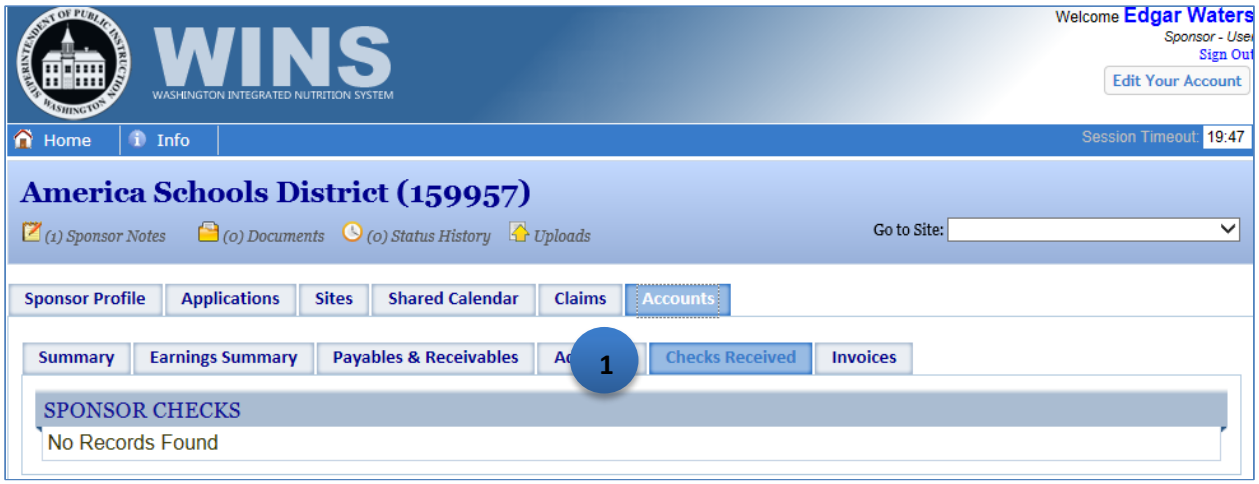
Payables & Receivables (1)

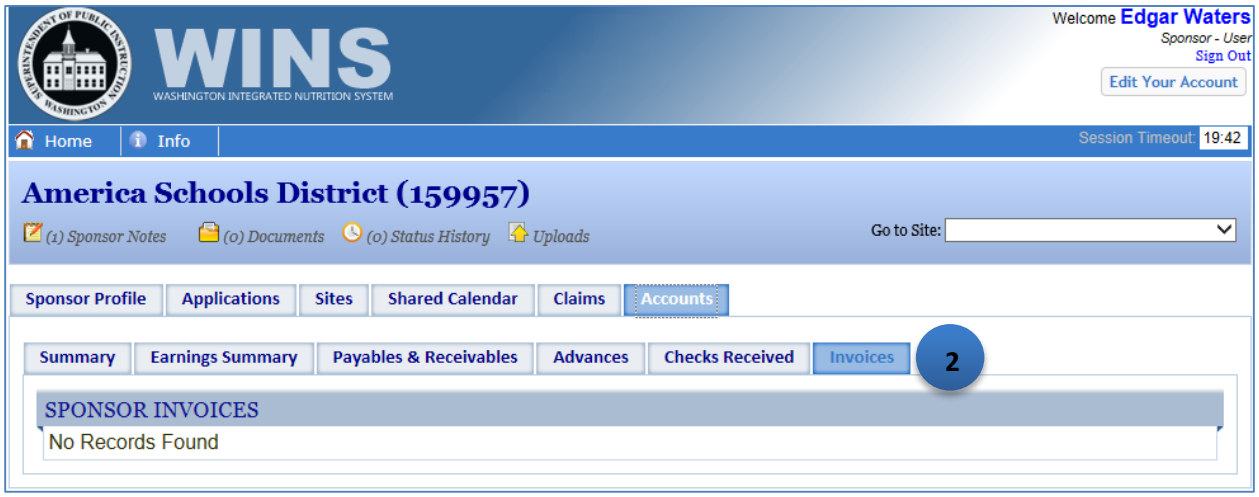
- The Payables & Receivables screen details any outstanding payables and receivables. Payables and receivables are normally from a claim revision that results in a different payment amount. If the revision results in an increase, the payment amount will be automatically sent to the sponsor. If the revision results in a lower amount, the difference will be an 'accounts receivable' to be collected from future payments.

Advances (2)

- The Advances screen details any advances that have been previously provided by OSPI. Advances are provided in very rare circumstances. Most sponsors will always show 'no records found'.

Review Account Information (cont.)





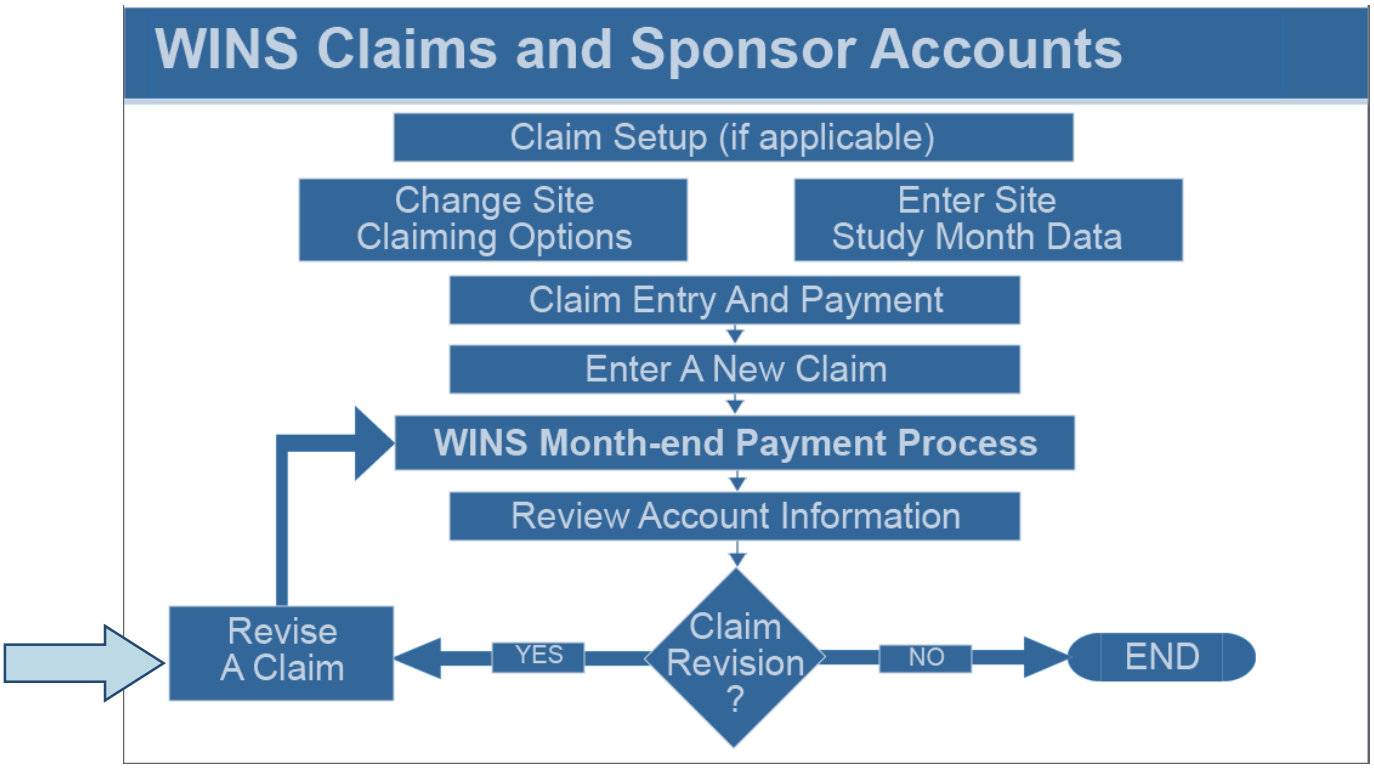
Checks Received (1)

- The Checks Received screen details any checks or payments from the sponsor that have been received by OSPI. If you send OSPI a check to pay for an invoice, OSPI will show the receipt of your check here.

Invoices (2)

- The Invoices screen details any invoices that OSPI has created and sent to the sponsor for payment.

Revise a Claim

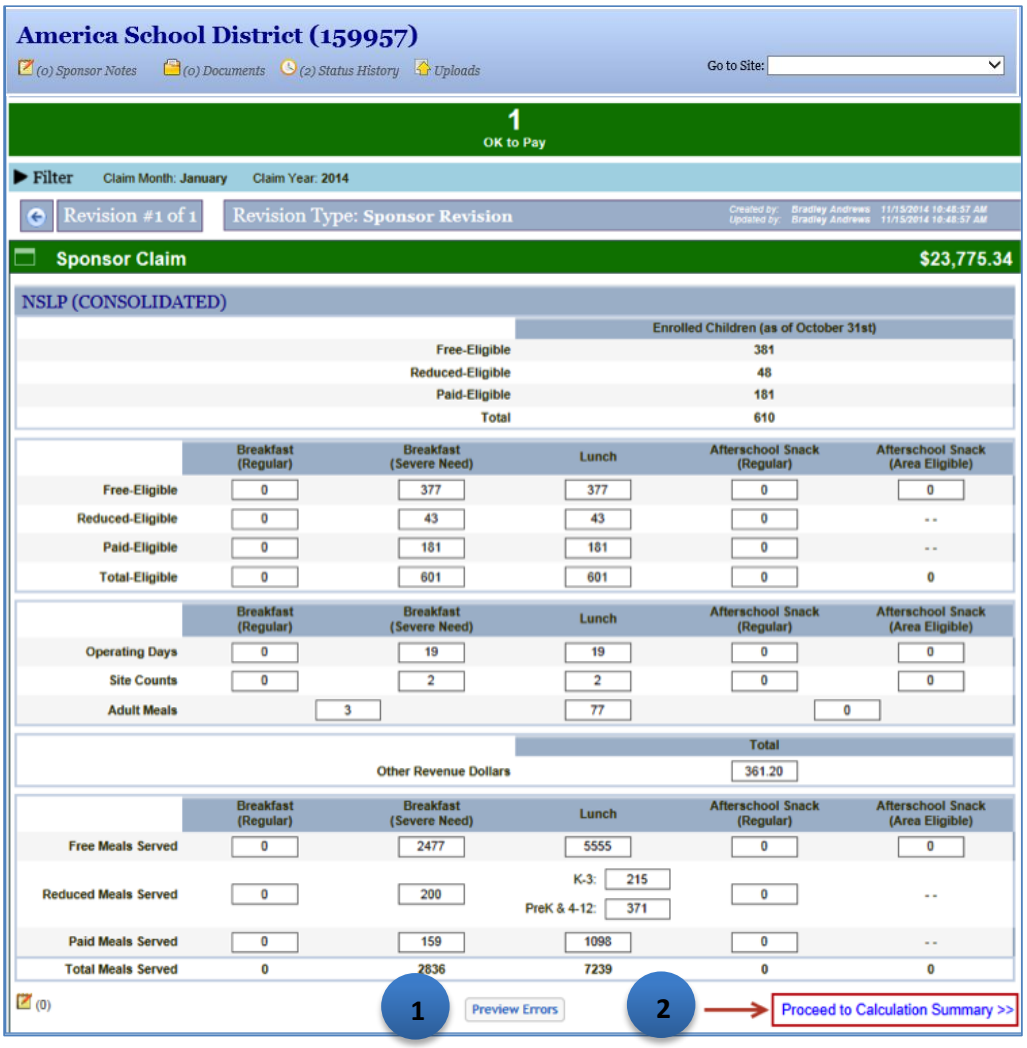


Revise a Claim (cont.)

Revise a Claim

- Click the Claims tab (1).
- Click the Revise icon for the claim month you wish to revise (2).

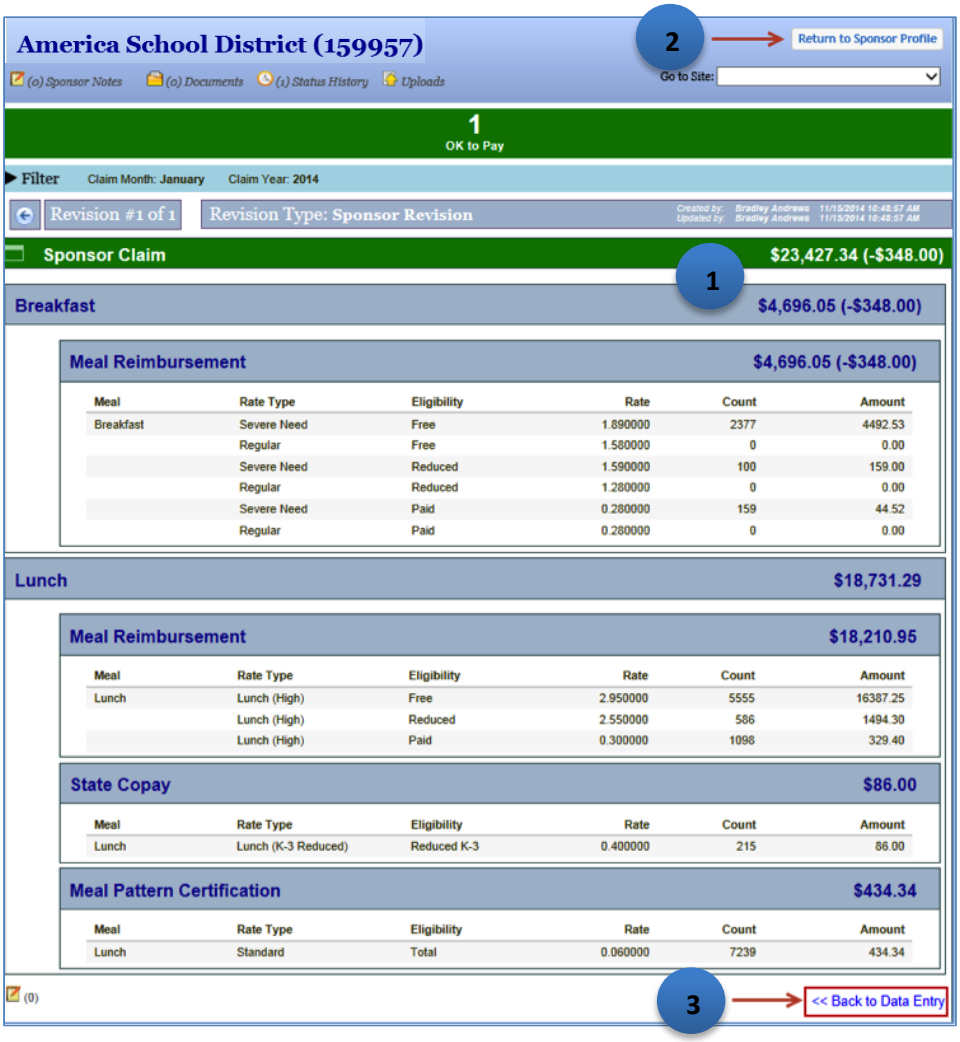
Revise a Claim (cont.)



Revise a Claim (cont.)

- The screen displays the data as entered on the original claim. Make any adjustments necessary, then click the Preview Errors button (1). If errors are shown, you will need to correct them. When all errors have been corrected, click the Proceed to Calculation Summary link (2).

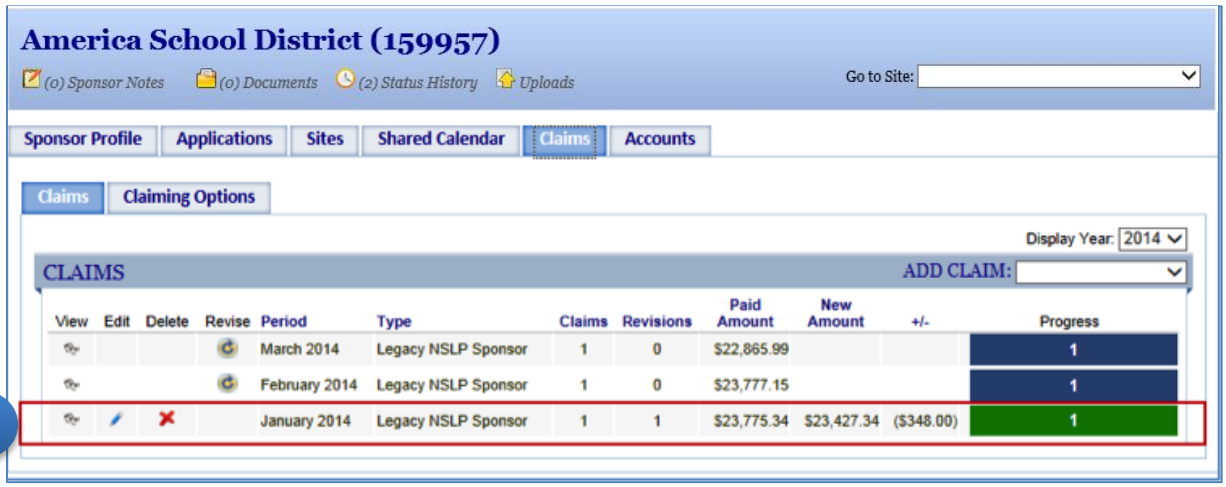
Revise a Claim (cont.)



Revise a Claim (cont.)

- The claim is recalculated and the screen shows a detailed breakdown of the adjusted claim, with the difference between the original and revised claim (1).
- To return to the main Claims screen, click the Return to Sponsor Profile button at the top of the screen or the Close button at the bottom (2).
  Note: To return to the data entry screen, click the Back to Data Entry link (3).

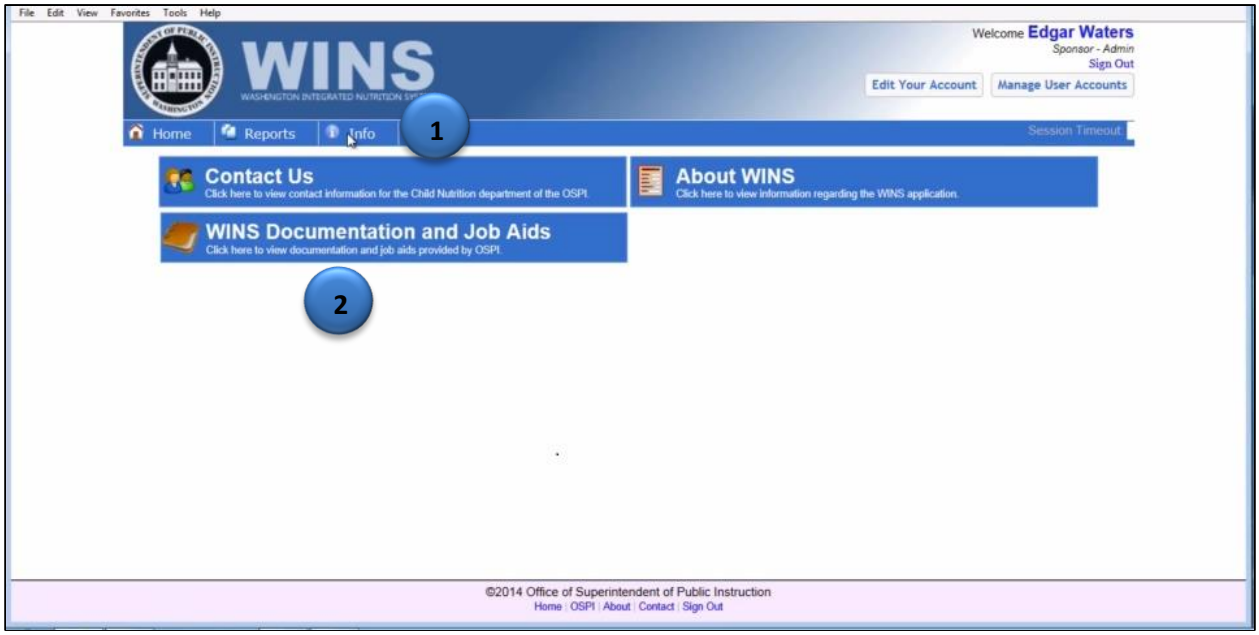
Revise a Claim (cont.)



Revise a Claim (cont.)

- The Claim screen shows the revised claim, with the original paid amount, the new amount to be paid, and the difference (1).
  Note: If you hover with the mouse over the green progress bar, you see the status is 'OK to Pay'.

Online Help and Job Aids



WINS Documentation

- To locate WINS documentation, click the Info tab in the WINS header. (1)
- Click WINS Documentation and Job Aids and the screen will display the files available. (2)
- Click the View icon to open the file.

Job Aids

- To locate WINS Job Aids, click the Info tab in the WINS header. (1)
- Click WINS Documentation and Job Aids and the screen will display the files available. (2)
- WINS Job Aids can also be accessed through a link on the Child Nutrition Services website.