

# Step by Step Guide to NEO

Welcome to the 2018 Summer Food Service Program (SFSP). If you are interested in becoming a sponsor please start the process by having the Summer Food Service Agreement approved by your legal agent and then fill out a Sponsor Application along with Site Information Sheets for each location you wish to serve summer meals. SFSP is administered through NEO, the reimbursement system used by the Maine Department of Education.

## FOR NEW SPONSORS:

The first step in becoming a SFSP sponsor is to request access to NEO by emailing MEDEMS [medms.helpdesk@maine.gov](mailto:medms.helpdesk@maine.gov). If you are currently a School District implementing the National School Lunch Program you can contact [Nanci.Kittredge@maine.gov](mailto:Nanci.Kittredge@maine.gov) and request Summer Food Service Permissions.

For Non-School Sponsors, email MEDMS helpdesk:

- Request permission to access Summer Food Service in the **Nutrition Module** of the NEO system. In your email to MEDMS specify that you are not a school district and you wish to become a Summer Food Service Program. You will need to state your Non-profit Sponsor's name and level of authorization (Sponsor or Legal Agent) to have an account created for you.

<b>Responsibilities of Sponsors and Legal Agents</b>	
<b>Sponsor</b>	<b>Legal Agent</b>
Reviews Summer Food Service Agreement	Approves Agreement
Files Summer Food Application	Approves Summer Food Application
Adds Site Address	
Files Site Information Sheet	Approves Site Info Sheet
Uploads Supporting Application Documentation	
Files for Advance	
Files Claim	Approves Claim

- If you wish to be both a legal agent and a sponsor you will need to provide two separate email addresses for each authorization level.

Non-School Sponsors must email Nanci to request a vender code. Should you have questions about becoming a sponsor, contact Adriane Ackroyd at (207) 624-6726,

[Adriane.Ackroyd@maine.gov](mailto:Adriane.Ackroyd@maine.gov) or need more detailed information about filing on-line, contact Nanci Stitt-Kittredge at [Nanci.kittredge@maine.gov](mailto:Nanci.kittredge@maine.gov) or (207) 624-6877.

*If you have not yet joined the Child Nutrition Listserv for important updates issued by the Maine DOE, please go to: <http://mailman.informe.org/mailman/listinfo/child.nutrition> and enter your email address, name and district information.*

**FOR RETURNING SPONSORS:** Those who already have an I.D. and password, log into NEO to complete the necessary forms. Steps to complete these forms are in detail below. If the sponsor (school) password level or legal agent password level has changed, please contact the MEDMS helpdesk before continuing. Please do not use someone else's ID and Password.

**APPROVAL OF SPONSORS:** Email will be used to communicate the status of the application and Site Information Sheets. A reminder email will also be sent to the sponsor when the application has been approved. If email addresses have changed, please update the application and notify MEDMS with the new addresses.

**Online applications should be submitted by April 30, 2018 to be guaranteed USDA Foods.** Please note that applications submitted after April 30, 2018 cannot be assured of receiving USDA Foods.

**FOR ALL SPONSORS:** We have included in this packet steps for submitting the necessary documents as SFSP sponsors and legal agents. *Please refer to this information when filing forms electronically.* The following are included:

- Steps to approve the Summer Food Service Agreement (only needed for new sponsor)
- Steps to file the Summer Food Service Application
- How to upload supporting documentation
- How to submit an advance
- Steps for the legal agent to approve an advance
- Steps for the legal agent to approve the Summer Food Service Application and supporting documents
- Steps to add sites and Site Information Sheets
- Steps for legal agent to approve Site Information Sheets
- Steps to file a claim

- Steps for legal agent to approve a claim

*Attendance at Summer Training is a requirement for participation in the Summer Food Service Program.*

**Please refer to the Maine Department of Education Child Nutrition website Events page for the SFSP training schedule. <http://www.maine.gov/doe/nutrition/resources/events.html>**

**To register for Summer training, please contact Paula Nadeau by email [pPaula.nadeau@maine.gov](mailto:pPaula.nadeau@maine.gov) or telephone (207) 624-6842.**

### **Steps to Approve the Summer Food Service Agreement (Legal Agent task) For New Sponsors\***

1. Follow the steps to be granted access into NEO system instructions on page 1 under “New Sponsors”
2. Once user name and password is obtained, log into NEO  
<https://neo.maine.gov/DOE/NEO/Accounts/Account/Login>
3. Click the “Nutrition” tab
4. Click the “Summer Food” tab
5. Under “Summer Food” drop-down, select “Agreement Listing”
6. The “Summer Food Agreement Listing” page will appear
7. Under the drop down menus select the following:

**Sponsor:** select your sponsor name

**Approval Status:** select “New”

8. Select “View Agreement” and the agreement will appear
9. Review information
10. At the bottom of the page, click “Accept” to accept the agreement
11. Under the Summer Agreement Listing page, your sponsor name should now show your approval status, date approved, and the ability to “View Approved Agreement” at any time

**Steps to File Summer Food Service Application (Sponsor Level task) Applications need to be approved before going further.**

*\*\*Summer food applications cannot be submitted until the Summer Food Service Agreement has been approved by the legal agent (steps above). \*\*If you are requesting an advance you must fill out the budget portion of the application and then click “save.” From there, go to the Advance form. Once the Advance form is filled out, submit your advance and then return to your application to submit.*

1. Log onto the NEO web page and enter your user name and password provided by MEDMS
2. Select “Nutrition” tab
3. Select “Summer Food” then click “Application Listing”
4. Under the drop-down menus make sure the following is selected:

**Year:** the current year

**Sponsor Name:** Your sponsor name

**Application Status:** Select “New” or the status applicable to your application progress

5. When your sponsor name appears, click “View Summary” next to your sponsor name
6. The “Summer Food Annual Application Packet” page will appear
7. Click “Application”
8. The address will auto fill as you go. When you are finished filling out the application you may hit “Save” to return and make edits later or “Submit” to send to the State Agency. REMEMBER “Save” is not the same as “Submit”.
9. Once you are finished with your application, you can return to the “Application Listing” page and “View Summary” to see your completed application packet.

**How to Upload Supporting Documents to the Annual Application Packet page**

1. Select “Upload Document” on “Annual Application Packet” page
2. Choose from the list of document types. If you do not see the document under “Document Types” listed, please contact Nanci Stitt-Kittredge at [Nanci.kittregde@maine.gov](mailto:Nanci.kittregde@maine.gov)
3. If you are a non-school sponsor, you will need to upload a 501c for conformation of non-profit status
4. Other types of documents you may upload to your Application Packet are:
  - Certificate of independent price determination

- Copies of all bids received
  - Copy of Food Service Management Company (FSMC) contract
  - Reason for selecting FSMC
5. Once uploaded, all documents will appear on the “Summer Food Annual Application Packet” page

### **Steps to File an Advance**

*A minimum of 10 operational days are required for any month in order to request an advance for that month.*

1. Log onto the NEO web page and enter your user name and password provided by MEDMS
2. Select “Nutrition” tab
3. Select “Summer Food” then click “Application Listing”
4. Under the drop down make sure the following is selected:

**Year:** Current year

**Sponsor Name:** Your sponsor name

**Application Status:** Will show your application’s status. Select the status that is applicable to your application progress.

5. Under your sponsor name select “View Summary”
6. On the Summer Food Annual Application Packet page select “Advances”
7. Fill out the form and click save to finish completing later or submit for LEA approval

### **Adding Sites (Sponsor Level)**

*For each Summer Meal’s location, a site must be added under the “Summer Food Site Listing” page where the site’s name and address are provided. From there a Site Information Sheet (site detail) must be created for each site location, this will include site type, number operating days, site capacity, and other general operating questions.*

### **To Add a New Site Location**

1. Log onto the NEO web page and enter your user name and password provided by MEDMS
2. Select “Nutrition” tab
3. Select “Summer Food” then click “Site Listing”

4. First search the site names listed on the page to make sure it hasn't already been added. If you find the site name already listed, click the "update" link to make sure the correct address has been imputed.
5. If site is not already listed click the "Add Site" link towards the top of the page
6. Fill out the required fields and click "Save" or "Submit"

### **Add Site Information Sheet (Site Detail)**

Once you have added a site's address to the "Summer Food Site Listing" page

1. Return to the "Summer Food" tab
2. Click the "Application Listing"
3. Click "View Summary" next to your sponsor name
4. Click "Add New Site Info Sheet"
5. Under "Meal Service Site" the site added to the "Summer Food Site Listing" should appear
6. Select your site and fill out the information as instructed
7. Once you are finished with the detail, you may "Save" for later completion or "Submit" for approval. Your site information will now be listed within your Annual Application Packet.

### **Steps for the Legal Agent to Approve Site Information Sheet**

1. Log onto the NEO web page and enter your user name and password provided by MEDMS
2. Click "Nutrition" tab
3. Click "Summer Food" tab
4. Click "Application Listing"
5. Click "View Summary" next to your sponsor name
6. At the bottom of the page are the SFSP sites the sponsor has created a "Site Info Sheet" for
7. Click "view"
8. Review the entry's information
9. If the information is correct, select "LEA Approve" to submit

### **Steps to File a Claim (Sponsor)**

1. Log onto NEO using user name and password provided by MEDMS
2. Select the "Nutrition" tab

3. Select “Summer Food” then click “Reimbursement”
4. Click “Claim Listing”
5. Under “Status” Select “New”
6. Under the “Year” the current year should be default
7. A line will appear containing your sponsor name, click “Create” on the right-hand side of the page
8. Fill out the information and click “Submit”

### **Steps for the Legal Agent to Approve a Claim**

1. Log onto NEO using user name and password provided by MEDMS
2. Select the “Nutrition” tab
3. Select “Summer Food” then click “Reimbursement”
4. Click “Claim Listing”
5. Under “Status” it will say “Pending”
6. A line will appear containing your sponsor name, click “Edit” on the right-hand side of the page
7. Click “LEA Approve”

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## **USDA FOOD ORDERING**

### **USDA Summer Food Distribution Program Order Listing**

1. Log onto the NEO web page and enter your user name and password provided by MEDMS.
2. Click “Summer Food”
3. Click USDA
4. Select “Product Selection Listing”
5. **Year:** Select current year

**Sponsor Name:** Select your sponsor name

A list will appear that looks like the image below:

Shipping Address	<a href="#">View</a>
Product Selection	<a href="#">Create/Edit</a>
Second Chance	<a href="#">Create/Edit</a>
Order Summary	<a href="#">View Summary</a>

*The First thing you will want to do is create a shipping address*

### **To create a Shipping Address.**

1. Click “view” next to “Shipping Address”
2. A USDA Food Distribution Shipping address form will appear.
3. Fill out a physical address for each type of inventory:  
(Refrigerated, Frozen or Dry) If all food is being shipped to the same address you can simply click the box that asks you “Copy from REFRIGERATED Address”
4. When you are finished click “submit” at the bottom

### **To Order USDA Summer Food**

1. Log onto the NEO web page and enter your user name and password provided by MEDMS.
2. Click “Summer Food”
3. Click USDA
4. Select “Product Selection Listing”
5. **Year:** Select current year

**Sponsor Name:** Select your sponsor name

The below image will appear:

Shipping Address	<a href="#">View</a>
Product Selection	<a href="#">Create/Edit</a>
Second Chance	<a href="#">Create/Edit</a>
Order Summary	<a href="#">View Summary</a>

6. Select “Create” next to Product Selection

The USDA Summer Food Distribution Program, Summer Food Order will appear.

The first thing you will see is your Sponsor name and the current year’s PAL. PAL stands for Planned Assistance Level. School nutrition operations receive a deposit of dollars into their commodity “entitlement bank account” that is equal to the preceding year’s lunches



served multiplied by the current entitlement rate. It is the amount of money available to pay for the USDA Foods that the government purchases and makes available to schools.

7. Below is a list of products that are available to you, each product has a number of “Allocated Units” meaning the maximum amount of that product you can purchase.

8. When you request a specific product, the number “Requested” cannot exceed the “Allocated Units”. *Example: If you have allocated 11 Cases, you cannot type 12 cases*

9. The “Price per Unit” will multiply by the number of cases you request. *Example if you see \$0.00 in the “Price Per Unit” box, nothing will come off your PAL if you select that product. If you see an amount in the Price Per Unit box, that amount multiplied by the number you request will come off your PAL.*

10. Once you click “submit” your “PAL After Order” listed at the top of the page will then reflect your remaining PAL. You can go up to either 10% or \$100.00 over your PAL Entitlement Total. *Example: PAL of \$58.42 can go up to \$158.42*

**USDA Ordering** takes place between **May 1<sup>st</sup> and May 15<sup>th</sup>**

if changes need to be made to your order, you have until May 12 EOB to contact Maine DOE to have your order changed.

## **SECOND CHANCE ORDERING**

What is left in inventory is called “second chance food” it will be available until midnight of May 18<sup>th</sup> and will be first come first serve.

### **To Order Second chance:**

1. Go to “USDA Summer Food Distribution Program Order Listing” page
- 2 Click “create” next to “Second Chance”
3. The number of products you request cannot be greater than the available amount listed.

### **ORDER SUMMARY**

The order summary on the “USDA Summer Food Distribution Program Order Listing” page will reflect your Starting PAL and Accepted PAL as well as the amount you have remaining.