

# Set Policies

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Minute Menu CX is designed to be highly customizable to meet a variety of business needs. The Manage Policies window allows you to customize CX and control many aspects of the program, such as edit checks, user preferences, general behavior, and so on. Review your policies to ensure that CX is set up to meet your agency's needs and expectations.

**Note:** If you operate in multiple states, you can set policies for separate states.

Policies should only be changed by the main decision makers of the company and/or those with the authority to do so. Changes to policies could impact claims. You can control access to policy settings with user permissions and staff types.

1. Click the **Administration** menu and select **Manage Policies**. The Manage Policies window opens.
2. Click **+** to expand categories/subcategories. Click **-** to collapse them again.
3. Double-click a preference description to view it in a larger pop-up. Click **OK** to close it.
4. Double-click the **Policy Value** column to update the setting for a particular preference. See the **Error Options** heading below for a description of the options you can set for the various edit checks.
5. When finished, click **Save**. You may need to close and re-open CX for changes to take effect.

**Note:** Click **Export** to export all policies, descriptions, and their current settings to a spreadsheet.

## About Edit Checks

Meal counts, attendances, menus, and more are entered into Minute Menu CX throughout the month. The software needs to process this data at the end of each

month. When a claim is processed, the system applies edit checks to the submitted meal count, menu, and enrollment data. It creates an error for any edit check that does not pass. Each error is documented on the Office Error Report (OER).

For example, the system checks to ensure that an individual child is not reimburse for more than 2 Snacks + 1 Meal or 2 Meals + 1 Snack. If a child is in attendance at additional meals, the extra meals are automatically disallowed, and the OER contains a claim error noting each disallowance.

**Note:** Minute Menu CX automatically selects the meals with the highest reimbursement rate to include on the claim. Meals with the lowest reimbursement rate are disallowed.

Some policies cannot be changed within the software, such as those policies mandated by the federal government. Such policies apply to all traditional center claims. However, local and state regulations (which vary from state to state) are controlled by the Manage Policies window. Each policy usually has three to four options that determine which errors are generated on the OER, as well as the outcome of those errors.

## Error Options

Each policy that controls an edit check usually has three options:

- **Disallow:** The processor automatically deducts meals based on the edit check that was violated. For example, if a child enrollment form has not been received, claiming that child is out of compliance with regulations. CX can automatically disallow reimbursement for any meal in which the child was claimed. These meals can be added back later, if needed. However, if you would disallow most of the time, choose this option.
- **Ignore:** The processor does not complete the edit check, and the error is not noted on the OER. For example, if checking to see if a child is claimed on a day or for a meal for which they are not enrolled is not a required edit check, you could set that policy to Ignore.
- **Warn:** The error does not deduct from the reimbursement, but should be researched to ensure that proper documentation was received or that procedures

were followed. These errors do show on the OER. For example, if a child noted with a special diet is served a meal and the Special Diet Statement has not been marked as received in CX, the processor notes Allow/Warn on the OER for this child's meals. This allows your staff to find out if the Special Diet Statement was received and correct the error in CX or disallow the meals. Note that this warning only shows when the claim is processed—not when the center is recording their claim.

There may also occasionally be additional options available.

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