

Complete Desk Reviews

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As the COVID-19 pandemic continues to escalate, some states may begin allowing sponsors to complete desk reviews in lieu of on-site reviews. A desk review is essentially a review done remotely while on-site reviews are temporarily suspended to prevent the spread of COVID-19. It is essential that you check with your state for guidance regarding reviews during the COVID-19 pandemic. Follow all regulations and guidance provided by your state.

Note: As of **March 27, 2020**, the FNS has issued waivers for Monitoring requirements in light of the COVID-19 pandemic. This waiver has been extended through September 30, 2021. [Read the full extension memo here.](#)

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General Tips

The following are useful tips for managing desk reviews for your providers:

- **Create a checklist:** Create a checklist of all required documentation, if you do not have one already. This will help your Monitors ensure that all documentation has been received from providers.
- **Communicate deadlines clearly:** Request documentation from providers early enough to allow them to gather and send such documentation to you. If your providers use KidKare, you and the provider both should be able to pull electronic records. The State may set a deadline from notification to documentation delivery, such as seven (7) days. Ensure your providers submit their documentation by said deadline.
- **Use online tools:** Use online tools, such as Google Drive or Dropbox, to share necessary documentation with staff while working from home. You can also store training on such platforms and send links to providers who require it.
- **Video Calls:** Use software to video call providers. Such software includes Skype, Google Duo, Zoom, Microsoft Teams, and so on.

Online Desk Reviews

You can adjust the review questionnaire and implement a few new practices to complete reviews in the KidKare Review Tool. This requires a few steps to set up in Minute Menu HX.

Prepare for Online Desk Reviews

Before recording online desk reviews, we recommend you make some adjustments to your preferences in Minute Menu HX and the review questionnaire in the [Admin Review](#) site.

1. Add a custom review field in Minute Menu HX for desk reviews.
 - a. Click the **Administration** menu and select **Sponsor Preferences**. The Sponsor Preferences window opens.
 - b. Click the **Select a Category to Move To** drop-down menu and select **R. Review Settings**.
 - c. Scroll to **preference r.028** and **r.028b** or to **r.029** and **r.029b**. The one you use depends on if you're already using one of the custom fields.
 - d. Check the **r.028** box or the **r.029** box.
 - e. Click the **Select Setting** drop-down menu and select **Y**.
 - f. Click **Save**.
 - g. Next, check the **r.028b** box or the **r.029** box.
 - h. Click the **Enter Text Setting** box and type **Desk Review**.


The screenshot shows the 'Sponsor Preferences' window. At the top, there are dropdown menus for 'Select the Category to move to:', 'Select the Error to move to:', and 'Select State: TX'. Below these is a section titled 'Policy Settings for TX. Policies with * have multiple state settings.' This section contains a list of checkboxes and their corresponding settings. The '028b. First Custom Checkbox Name*' checkbox is checked, and its 'Current Setting' is 'Desk Review'. The 'Enter Text Setting' field is highlighted with a blue box and contains the text 'Desk Review'. At the bottom, there are buttons for 'Print List', 'Print Changes', 'Cancel', 'Save', and 'Close'. A warning message is displayed at the bottom left: 'WARNING: Changing systems settings can have far reaching consequences. If you change something improperly, claims may be improperly paid. If you are at all unsure about making a change, please contact Minute Menu support BEFORE you make changes.' A note at the bottom right says 'Uncheck the Policy or click Cancel to de-select your choice.'

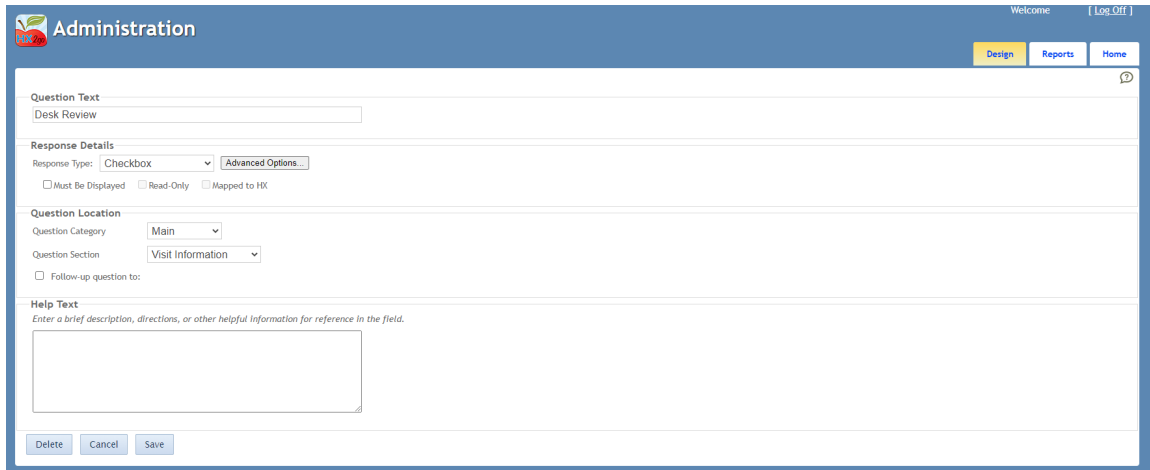
- i. Click **Save**.

Note: If you operate in multiple states, you must adjust these preferences for each state in which you operate. Use the Select State drop-down menu to switch states and then repeat **Steps 1.a - 1.i**.

2. Add a custom question to the review questionnaire in the Admin Review site and link it to the custom review field.
 - a. Log in to <https://reviewadmin.minutemenu.com/Account/LogOn>. Use the same credentials you use

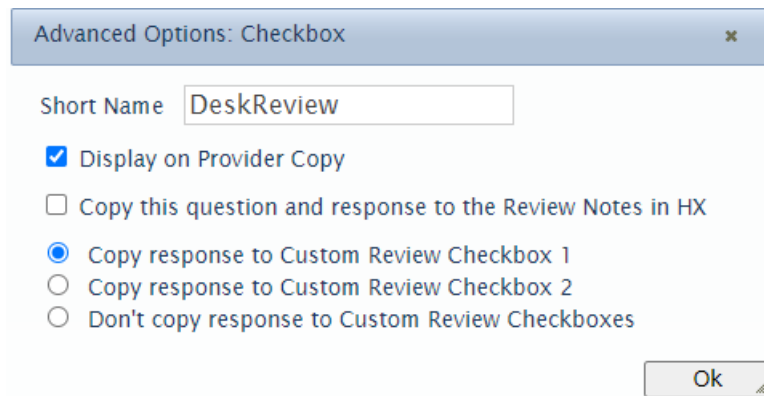
to access Minute Menu HX.

- b. Click the **Design** tab.
- c. In the **Visit Information** section, click . The question details open.
- d. Click the **Question Text** box and enter something like **Desk Review** or **Is this a desk review?**
- e. Click the **Response Type** drop-down menu and select **Checkbox**.



The screenshot shows the 'Administration' interface with a blue header. In the top right, there are links for 'Welcome' and '[Log Off]'. Below the header, there are three tabs: 'Design' (highlighted in yellow), 'Reports', and 'Home'. The main content area is titled 'Question Text' and contains a text box with 'Desk Review'. Below this is the 'Response Details' section, which includes a 'Response Type' dropdown set to 'Checkbox' and a link for 'Advanced Options...'. There are also checkboxes for 'Must Be Displayed', 'Read-Only', and 'Mapped to HX'. The 'Question Location' section has a 'Question Category' dropdown set to 'Main' and a 'Question Section' dropdown set to 'Visit Information'. A 'Follow-up question to:' checkbox is also present. The 'Help Text' section has a text box with a placeholder: 'Enter a brief description, directions, or other helpful information for reference in the field.' At the bottom of the form are 'Delete', 'Cancel', and 'Save' buttons.

- f. Click **Advanced Options**.
- g. Click the **Short Name** box and type **DeskReview**.
- h. Select one of the following options, according to how you set your preferences in **Step 1** (First Custom Checkbox or Second Custom Checkbox).
 - Copy Response to Custom Review Checkbox 1
 - Copy Response to Custom Review Checkbox 2
- i. Click **OK**.



The screenshot shows a dialog box titled 'Advanced Options: Checkbox' with a close button (X) in the top right corner. Inside the dialog, there is a 'Short Name' text box containing 'DeskReview'. Below this are several options with checkboxes or radio buttons:

- ☒ Display on Provider Copy
- ☐ Copy this question and response to the Review Notes in HX
- ☒ Copy response to Custom Review Checkbox 1
- ☐ Copy response to Custom Review Checkbox 2
- ☐ Don't copy response to Custom Review Checkboxes

An 'Ok' button is located at the bottom right of the dialog.

- j. Click **Save**.

Since you mapped the Desk Review question to the custom review field you created, the custom checkbox will be checked in the Provider Reviews Other tab in Minute Menu HX if it was checked on the review. You can also include the custom checkbox in the Review List Export. This allows you to easily determine which reviews were completed as Desk Reviews.

Record Online Desk Reviews

Record desk reviews in the KidKare Review Tool as you normally would. However, we recommend you also implement the following best practices:

1. The Monitor can sign **Desk Audit** in the **Provider Signature** box.
2. Ensure that the provider's email address is entered and correct so the system can email a copy of the Review report to the provider.
3. Once the review is complete, have the provider forward the Review report to you and include an acknowledgement that they have received the report and the information contained therein is correct. Be clear with your providers that they must forward it to the email address you provide, as replying to the report notification (instead of forwarding it) will reply to the KidKare Support team.

Manual Reviews

Enter manual reviews as you normally would. However, we also recommend you set up a Desk Review custom checkbox as you would for online reviews. This allows you to easily track which manual reviews were completed as desk reviews.

1. Click the **Administration** menu and select **Sponsor Preferences**. The Sponsor Preferences window opens.
2. Click the **Select a Category to Move To** drop-down menu and select **R. Review Settings**.
3. Scroll to **preference r.028** and **r.028b** or to **r.029** and **r.029b**. The one you use depends on if you're already using one of the custom fields.
4. Check the **r.028** box or the **r.029** box.
5. Click the **Select Setting** drop-down menu and select **Y**.
6. Click **Save**.
7. Next, check the **r.028b** box or the **r.029** box.
8. Click the **Enter Text Setting** box and type **Desk Review**.

Sponsor Preferences

Select the Category to move to: Select the Error to move to:

Select State: TX

Click the Checkbox next to a policy to change it's setting.
Click the Description row to see the entire description.

Policy Settings for TX. Policies with * have multiple state settings.

<input type="checkbox"/> 028. Use First Custom Checkbox*	Current Setting: Y
Do you want to enable a custom field, stored as a Y/N checkbox? It's saved on the Review record, and can be reported via th	
<input checked="" type="checkbox"/> 028b. First Custom Checkbox Name*	Current Setting: Desk Review
If you Use First Custom Checkbox, what do you want to call that field?	
<input type="checkbox"/> 029. Use Second Custom Checkbox*	Current Setting: Y
Do you want to enable a custom field, stored as a Y/N checkbox? It's saved on the Review record, and can be reported via th	
<input type="checkbox"/> 029b. Second Custom Checkbox Name*	Current Setting: Was The Exp date on the Enrollment form Checked?
If you Use Second Custom Checkbox, what do you want to call that field?	

WARNING: Changing systems settings can have far reaching consequences. If you change something improperly, claims may be improperly paid. If you are at all unsure about making a change, please contact Minute Menu support **BEFORE** you make changes.

Enter Text Setting: Desk Review

Uncheck the Policy or click Cancel to de-select your choice.

Print List **Print Changes** **Cancel** **Save** **Close**

9. Click **Save**.

Note: If you operate in multiple states, you must adjust these preferences for each state in which you operate. Use the **Select State** drop-down menu to switch states and then repeat **Steps 1.a - 1.i**.

When you enter the review, this checkbox displays in the Provider Reviews Other tab. Check it to indicate that this was a desk review. You can also include the custom checkbox in the Review List Export. This allows you to easily determine which reviews were completed as Desk Reviews.

The screenshot shows the 'Add New Review' window with the 'Other' tab selected. The window title is 'Add New Review' and it includes a close button (X). The header information reads: 'Cordova, Anna 001239 Review Date: 08/12/2020 Meal: Breakfast'. The 'Other' tab contains the following elements:

- General Section:**
 - ☐ Nutrition Info Left
 - ☐ Eligibility Changed
 - ☐ Can Claim Own Children
 - ☒ Special Diet Statement
 - ☐ New Address
 - ☐ Helper Present
 - ☒ Civil Rights Review Complete
 - ☒ Building For the Future
 - ☒ Voucher/Subsidy Children Present
 - ☐ Corrective Action
 - ☒ Whole Grains Served Daily
- Left 4 Month Supply of:**
 - ☐ Regular Menus
 - ☐ Infant Menus
 - ☐ Enrollment Forms
 - ☐ Other Forms
- Day Care Child Count:** 0
- Own Child Count:** 0
- Own Child Eligible Count:** 0
- Own Child Ineligible Count:** 0
- Comments:** (A large text area for comments, with a note below it: '(Not printed on Sponsor Review Worksheet)')
- ☐ Block Claim Visit
- ☐ Block Claim Validated
- Date of Last Training on File:** (Dropdown menu)
- Block Claim Reason:** (Dropdown menu, currently showing '--Select--')
- Provider Tier:** (Dropdown menu, currently showing '--')
- Provider Tier Reason:** (Dropdown menu, currently showing '--Select--')
- ☐ Provider Mixed Tier Determined by Parent's Income Eligibility
- ☒ Desk Review
- ☐ Was The Exp date on the Enrollment form Checked?
- Custom Date 1:** (Dropdown menu)
- Custom Date 2:** (Dropdown menu)

At the bottom of the window, there are four buttons: 'Add Another', 'Disallow Calendar', 'Save', and 'Close'.