| VENDOR QUESTIONNAIRE | Company Name: |
|---|---|

## TECHNOLOGY

| Requirement: | Response (YES or NO) |
|---|---|
| Automated synchronization features for communicating updates in realtime between online payments, portal, central student database and distributed databases, supporting redundancy for off-line operation at the cashier station and manager station, as well as student mobility between schools | |
| Automated synchronization feature for communicating in near real-time between AERIES (SIS system) and supported software | |
| Software must be compatible with preexisting hardware including Tablet Kiosks, Genovation keypads, and laptops. | |
| Central Database must be cloud based | |
| Online payment processor must be Payment Card Industry Data Security Standard (PCI DSS) Certified Webpage for further information listed below. https://www.pcisecuritystandards.org/ | |
| Online payment site must be secure | |
| Transfer and Storage of Student Data must be encrypted and handled in accordance with local, state, and federal statutes outlined in the California Student Data Privacy Agreement. | |
| Built-in interface to accept web free and reduced applications and alternate income form applications | |
| Built-in exports to Excel, CSV, Word, Text and PDF | |
| Ability to integrate with ISITE software for digital menu boards, menu planning and automated email menus | |
| Customizable touch screen software for key size, shape, colors, and number of items on screen and graphics | |
| Automated phone AND email notification system in multiple languages including English and Spanish | |
| Must ensure data integrity of Free/Reduced eligibility start dates | |

## INVENTORY

| Requirement: | Response (YES or NO) |
|---|---|
| Identify food and non-food items | |
| Identify purchased and commodity items | |
| Support multiple vendors and supply units per items, including commodities | |
| Deplete spoilage and loss with reasons | |
| The option to set up cost basis using contract price, last price, weighted average, transfer cost, fair market value, delivery cost | |
| Automated order feature at the site level using current Nutrition Services Vendors. Please list all Vendors that are compatible with software. | |
| Ability to create an order based on par, predefined shopping lists, menu forecast, virtual stock level including on-hand plus on order minus committed stock, automatically split orders between vendor supplied, District approved and warehouse items | |
| Ability to receive items manually or update receiving | |
| Track variances between ordered and received counts and prices | |
| Allow the option to receive all items or to enter changes | |
| Physical Inventory Counts and Value Reporting | |

| INVENTORY Continued: | Response (YES or NO) |
|---|---|
| Allow Site user to reject items with reasons from prepopulated rejection list | |
| Allow for the entry of additional cost such as delivery fee, processing fee, broker's fee, storage fees, and pass through value (net off invoice) | |
| User would be able to enter zero or partial received for shorted/out of stock items and discrepancies with the option to back order the item | |
| Provides the ability to display/print a report based on invoice number/vendor which provides a listing of variances in price and quantity between ordered and received | |
| Entry of counts in both usage units and purchase units | |
| Site user has the ability to setup and control physical inventory storage locations | |
| Physical inventory count sheets printable to match storage locations established by site user | |
| Display/Print variance report showing discrepancies in perpetual versus actual inventory balances | |
| Ability to input ingredient list for each item received into inventory to identify allergens including but not limited to the 8 top allergens | |
| Multiple vendors and prices per item, multiple supply units and packs per item, easily set and change priority for primary supplier, easily set and change priority for commodity items, set minimum ship quantity or dollar limit per vendor with warning alert to user during creation of orders | |
| Inventory adjustment which inventory is decreased or depleted requires a reason. Reason should be prepopulated | |
| List and sort orders by origin, delivery dates, and sites | |
| Track rejections for return to vendor or warehouse | |
| Support back order feature that can be turned on and/or off at District level | |
| Discrepancy report for variances between ordered and received items based on invoice | |
| Printed physical inventory count sheets match screen | |
| Ability to use mobile scanning device to enter physical inventory | |
| Inventory items can be looked up by category, alphabetically or key word/s without additional designation | |
| Ability to designate items to be pulled from a specific warehouse - in one location | |
| Site to be able to create a single order, system creates pull slips for the correct warehouse | |
| Easily set an order hierarchy for each inventory item | |
| Allow users to sort the receiving ticket in various ways in order to easily read and enter data from supplier invoice or packing slip | |

## PURCHASING

| Requirement: | Response (YES or NO) |
|---|---|
| Ability to preselect specific site orders for automatic approval | |
| Automatically transform requisitions to purchase orders and supply orders based on supply chain hierarchy | |
| Summarize orders for multiple sites for drop ship by vendor | |
| Block items from appearing at specific sites | |
| Block sites from ordering specific items | |

## FREE/REDUCED APPLICATION AND ALTERNATIVE INCOME FUNDING (AIF) FORM PROCESSING

| Requirement: | Response (YES or NO) |
|---|---|
| Complies with current USDA and state application regulations | |
| Direct certification via file import from CALPADS and the county | |
| Built-in interface to accept online free and reduced applications or AIF | |
| Complete Verification module | |
| Integration with online web applications | |
| System must have its own free/reduced meal application and/or alternate income funding form with the ability to upload directly to the software program | |
| Ability to integrate with Aeries Student Information System and automatically import eligibility from meal/alternate income form application | |
| System ensures eligibilities are not overridden incorrectly. For example, from a "DC free" to "AIF reduced" | |
| System keeps original eligibility date for students when students transfer between schools within the district | |
| Automated year end rollover process | |
| Software generates Notification letters (Increase or decrease in benefits) | |
| Online Meal Application and AIF software must be able to be accessed by Parents/Guardians by either; desktop computers, laptops, tablets, and handheld mobile devices (Phones/Tablets) | |

## MENU PLANNING AND NUTRIENT ANALYSIS

| Requirement: | Response (YES or NO) |
|---|---|
| USDA approved Nutrient Standard Menu Planning | |
| Complies with Healthy Hunger Free Kids Act / Preloaded with the latest USDA Child Nutrition (CN) database version | |
| Food based component menu planning | |
| Inventory/Commodity/Ingredient Management | |
| Recipe Management / Finished Product Management | |
| HACCP, Allergens, and Target Temperature support | |
| Create, edit, and delete menu templates for each meal and age group | |
| Ability to track allergens from receiving to finished product in recipes | |
| Create, edit, and delete cycle menus from menu templates | |
| View average nutrition of a menu for 3-7 days with the ability to drill down today, menu, pattern, recipe, and item | |

| MENU PLANNING AND NUTRIENT ANALYSIS: Continued | Response (YES or NO) |
|---|---|
| Display costing per serving, cost per person, and food cost percentage | |
| Calendar menu can be printed and exported to other programs to allow for enhancement with graphic and additional notes | |
| Allow export of calendar into other programs to allow for enhancements such as allergen codes, nutrition, and export to HTML for web display | |
| Scale menu forecasts based on entering overall meal count forecast | |
| Editable menu item counts | |
| Support editing of individual menu item counts for offer versus serve | |
| Distinguish between reimbursable meal forecast, adult, and ala carte forecast for nutrition analysis | |
| Analyze actual nutrition data after production record is complete | |
| Ability to analyze compliance with various meal patterns: NSLP, SBP, CACFP, Summer etc. | |
| Allow user to view actual nutrient analysis based on amounts entered from production records | |
| Support unlimited nutrition categories | |
| District can determine and set up categories based on needs – such as entrée, vegetable, fruit, etc. | |
| Ability to create recipes into an inventory item | |
| Ability to create a single recipe into various ingredients (i.e. #12 scoop or # 16 scoop) | |
| Each inventory offers the option of multiple unit definitions, food component definitions, and links to nutrition data | |
| Recipes support multiple serving units | |
| Each recipe allows for multiple serving unit descriptions, food component definitions, and links to an ingredient and/or finished goods nutrition data | |
| Recipes are a finished product | |
| Every recipe is automatically a finished product upon production and can be ordered, received, counted, and wasted/spoiled | |
| Preloaded database to include USDA recipes and USDA items. Ingredients/Recipes can be downloaded, copied, linked and re-linked to and from the Child Nutrition (CN) database. | |
| Downloaded ingredients/recipes cannot be edited by the user/site | |
| Site users cannot change recipes and/or ingredients other than portions needed for production | |
| Manual or scannable entry of nutrition data | |
| Provides for menu planning, production, ordering and the inventory modules that are completely integrated | |
| Allow District users to add nutrition received from manufacturer specifications and labels | |
| Ability to print (detailed) menu formatted reports showing each menu items nutrient continents, i.e. carbohydrates, fat, calories, etc. not just total  nutrients for the day (summary) | |
| | |

| FOOD PRODUCTION | |
|---|---|
| Requirement: | Response (YES or NO) |
| District user defined production records | |
| District can design production records based on their needs and criteria to include inventory item number, vendor item number, pack size, portions per pack and serving size. Information is automatically generated based on the menu | |
| Print production records based on local and state guidelines | |
| Summarize orders by item for multiple sites for food production | |

| FOOD PRODUCTION: Continued | Response (YES or NO) |
|---|---|
| Display production record screen for data entry based on menu plan | |
| Hide or display ingredients of recipes | |
| Record target temperature, time of withdrawal of item from heating or cooling source, temperature at withdrawal, and holding temperature on serving line | |
| Automatically create finished goods for produced items | |
| Create pick list for ingredients based on recipes and automatically deplete stock based on recipes | |
| Automatically return finished goods to stock or spoil finished goods after posting usage | |
| Leftover Management | |
| Allow site NSA 3 to add leftovers to the menu | |
| Allow adjustment of preparation requirements based on leftovers available | |
| Automatically deplete raw ingredients from inventory when integrated with inventory module | |
| Allow site NSA 3 to choose between: Waste, Freeze (with use by date), Refrigerate (with use by date), and Use next day (with use by date) for leftovers | |
| Users may choose to display or hide ingredients on production records so that only the menu item displays | |
| | |

| ONLINE WEB PAYMENT PROCESSING | |
|---|---|
| Requirement: | Response (YES or NO) |
| Parent account management (ability for parents to set up email alerts on student's balance, set up automatic scheduled payments, able to view purchase history, divide payments between students in family and at different building sites) | |
| Ability to send balance alert email or text, both low and negative balance | |
| Online payment via web or phone | |
| Ability for parents to use credit card, debit card, or e-check | |
| Provides detailed monthly banking and financial reports | |
| Ability to setup recurring payments | |
| Minimal or no convenience fee for parents | |
| | |

| MEAL ACCOUNTABILITY & FULLY INTEGRATED FRONT OFFICE | |
|---|---|
| Requirement: | Response (YES or NO) |
| Centralized student database account management | |
| Enrollment interface-AERIES | |
| Payment updated from web portal in real time | |
| Balances updated with school cafeterias in real time | |
| Student/Adult accounts accessible from any school site POS with real time balances | |
| Ability to limit or restrict Student/Adult access at site level or site group (Middle, High) | |
| Centralized payment and refund capabilities | |
| Generate USDA Edit Check report | |

| MEAL ACCOUNTABILITY & FULLY INTEGRATED FRONT OFFICE: Continued | Response (YES or NO) |
|---|---|
| Generate USDA approved reimbursement report | |
| Support Community Eligibility Provision (CEP) | |
| Allow students and adults to access their accounts from any cafeteria with local or home authority | |
| Ability to provide customizable reports | |
| Interface for accounting | |
| Support CEP Documentation (base year and succeeding years documentation) | |
| Export data to a variety of formats; Excel, Word, PDF, Text, Google Sheets, and CSV formats/spreadsheets | |
| Meal eligibilities categories are defined by the District office (free/reduced/paid/adult/employee, etc.) | |
| Variable report generating criteria | |
| The ability to generate reports based on all schools, groups of schools, or individual schools | |
| Reports screen includes a preview option | |
| Allow the user to select correct reports before printing it | |
| Reports can be set to automatically generate | |
| Reports are displayed on screen with the option to save, print or export the report | |
| End of day reports can be set up to generate after site completes end of day routine. Criteria for which reports to auto generate can be determined by executive users | |
| Centralized importing and exporting of student pictures | |
| Centralized keyboard and menu management | |
| Menu templates are set up by Central Office with site NSAIII having access to change/update for that site only with drag and drop interface | |
| Easy to add new POS item | |
| Ability to edit existing products | |
| Products are automatically updated on the POS if they are changed in inventory | |
| Bank deposit reconciliation | |
| Profit & Loss statements by site | |
| Allows for 30 operating day grace for previous year eligibility status and ability to add students to a "temporary" class during the grace period | |
| POS/Meal Application system must be able to roll back student's meal status to the "date the household submits an application", and recoup/recalculate any Free/Reduce/Paid meal status and monies owed/collected to student account. For further information, please see CA CDE policy bulletin # SNP-08-2014 "Effective Date of F/RP Meal Eligibility". https://www.cde.ca.gov/ls/nu/sn/mbsnp082014.asp | |
| Allow the user to set up custom reports as needed without vendor tech support | |

| POINT OF SALE | |
| --- | --- |
| **Requirement:** | **Response (YES or NO)** |
| Support multiple Point of Sale terminals per school | |
| Customizable touch screen software for key size, shape, colors, and number of items on screen and graphics | |
| Touch screen accommodates right or left hand user Interface. | |
| Programmable keys with at least 80 item keys | |
| Purchases can be made with cash, check or from student's account | |
| Support NO ID cash sales | |
| Support dual serving lines per cashier register | |
| Indicates which pin pad is being used on the point of sale | |
| Support prepayment at the POS | |
| Cashier can enter cash or check information, including check number without leaving the sales screen | |
| Apply change to account without leaving the sales transaction | |
| One button charging option while still in the sales screen | |
| Provide multiple methods for patron identification | |
| Query can be done by name, PIN, or ID | |
| Provide for bar-coded ID card | |
| Software must be compatible with preexisting hardware including Tablet Kiosks, Genovation keypads, and laptops. | |
| Allow cashier to enter ID | |
| Student information and sales screen includes picture, notes, name, ID, and account balance | |
| Ability for sales screen to notify cashier of account alerts (allergy, low balance, customizable notes and Student/Adult is from another site) | |
| Support sales by class roster on screen | |
| Allow correction voiding and correction of sales transaction based on user defined criteria | |
| Provide for the ability to limit or authorize voids and sales correction based on predefined hierarchy. Administrators and NSA III would be allowed; cashier would not be allowed | |
| Support grade, student, adult, and employee sensitive pricing | |
| Emergency Roster | |
| Allow sites to print emergency roster by class or grade for manual sales entry, if needed | |
| Support electronic or manual cash drawers | |
| Support tiered meal pricing | |
| Patron picture displays at any terminal during sales | |
| Automatically synchronize student eligibility and demographic with the Central Office | |
| Ability for a speed or auto-serve mode | |
| Ability to use either their existing unique student PIN number or their 9 digit student identification number during the transaction | |
| Ability to input bulk meal counts under the "free" eligibility category(snacks) | |
| Ability to input free/reduced/paid percentages into system for CEP reporting | |
| Cashier may still process transaction even if the connection with the network is lost | |
| Ability to attach/upload meal accommodation form to students' account | |
| Software must have a "Principals" or "House" account that student's additional meals can be charged to | |
| Blind Balancing | |

| POINT OF SALE: Continued | Response (YES or NO) |
| --- | --- |
| Reports to be included as part of the end of day can be determined by the user | |
| Supports touch screen option | |
| Menu Item Lookup | |
| Menu items can be looked up by category, alphabetically, numerically, or keyword | |
| Sales can be viewed remotely in live time | |
| Automatically detects second reimbursable meal and charges a la carte or second meal price | |
| Automatically detects ID entry from visiting students from other schools within the district | |
| Log reimbursable sales to student not in the student database | |
| Allow cash, check, or charge for each transaction when appropriate | |
| Displays and prints a detailed report of students daily, weekly, monthly, and yearly activity | |
| Determine overage and shortages for each cashier | |
| Ability to track/print an individual cashier (user) overages and shortages for a period of time | |
| Ability to use current student pin numbers | |

| ONLINE PRE-ORDERING (MOBILE APP) | |
| --- | --- |
| Requirement: | Response (YES or NO) |
| Mobile App must be supported by Android and iOS Software | |
| Mobile App automatically synchronizes to Menu Production or allows for menu customization which would allow only specific menu items to be ordered | |
| Online/Mobile Ordering allows for customizable pick-up locations | |

| CENTRAL SUPPLY DISTRIBUTION/WAREHOUSE | |
| --- | --- |
| Requirement: | Response (YES or NO) |
| Any site can be flagged as a central supply site capable of receiving supply orders and processing transfers | |
| Transfers automatically combine requisitions from a site for a date range and delivery date | |
| Ability to edit requisition tickets before generating pick tickets | |
| Generate pick tickets | |
| Summarize orders by item for warehouse pull slips | |
| Transfers can be made even if stock level goes below zero | |
| Supports transfers in any unit, usage unit, pack unit, or purchase unit | |
| Ability to supply different pack unit than was ordered and display difference on transfer and shipping ticket | |
| Ability to search by item, inventory number, or key word to input orders | |
| Ability to generate a master pull list by date, warehouse, and/or storage location | |

| TRAINING & IMPLEMENTATION | |
| --- | --- |
| Requirement: | Response (YES or NO) |
| Provide training for all District and school site users as needed and on a continual basis | |
| Ability to train specific modules | |
| Training materials are available for specific modules | |
| Webinars available for additional training opportunities | |
| Support and assist with initial data input for implementation | |

| TRAINING & IMPLEMENTATION: Continued | Response (YES or NO) |
|---|---|
| Please list Support and Technical assistance hours of availability | |
| What is your average wait time before a support/line call is answered? | |
| Please list how many Support and Technical assistance staff are available to answer your support/helpline | |
| Please list your typical time to resolve issues | |
| Please explain the process to resolution when an online technical support member is unable to resolve an issue over the phone and/or by remoting into our system | |
| For escalated technical support, how many support staff are available? | |
| What is the turnaround time for escalated technical support issues? | |
| | |
| **REFERENCES** | |
| **Requirement:** | |
| Please submit three current school district references including district name, contact person and phone number/email: | |
| 1 | |
| 2 | |
| 3 | |
| 4. | |
| | |
| | |
| Signature & TitleDate | |
| | |

*Please print out this last page with your Signature, Title and Date with your emailed responses by the date indicated in the RFP*