

Business Process Management for

Scanning & Online Apps, Household Surveys, Allergen Management, Doctor's Diet Orders, Cafeteria Inspection Reports, Catering Management, Summer Feeding Program sign-ups, Invoice Processing, Pre-populated forms of any type & more...



Press Release - August 2016: PCS Revenue Control System, Inc., a nationwide provider of K-12 school food and nutrition services technology has acquired ABT, Advanced Business Technologies, a leading provider of scanning, online applications, and custom forms for the K-12 school food and nutrition market. The ABT group adds a combination of document automation technologies to the PCS suite of programs along with years of experience in *business process management* for any school district needs, food or business services.

Cloud based and self hosted document management systems for both online and traditional printed paper forms for every foodservice business process. PcsForms utilizes the latest technology from OpenText to provide our own integrated Free and Reduced scanning and online applications. There is no end to the tasks that can be automated.



Whether you take your work flow online or want to save money scanning paper applications and surveys, PcsForms has the solutions!



No more red lines or two color printing. You can even process faxed forms or copy existing forms as the basis of your new form! Online operation support multiple formats and platforms for computers, laptops, tablets, and smart phones along with electronic signature. Pre populated forms speed completion of Free and Reduced applications for parents and a combination of ICR, OCR, and IMR technologies speed processing of paper applications while reducing errors.

PcsForms Custom Shop - Customize any of the solutions on the following page to your needs or sign up for a workflow analysis and see how we can reduce steps and eliminate tasks in almost any area.

Business Process Management

Eliminate steps and streamline tasks
while you take your paper forms **ONLINE**
with digital document solutions for ...



Free and Reduced Scanning and Online Apps

Fully integrated with RIGHTrak and RightNOW central office application processing and interfaces with any F&R software.



Special Diets - Allergen tracking & Doctor's Diet Orders

Facilitates communication between doctors, parents, district staff and managers. Identifies and tracks allergens from scanned product labels and fact sheets to provide custom menu planning for dietitians working with individual students requirements, including POS messages.



Catering Management

Online catering order processing provides central approval, automated email confirmations, invoice generation, eliminating messy spread sheets.



Household Income Surveys

Maximize funding for CEP schools with online or scannable paper surveys to replace Free and Reduced applications.



Homeless / Migrant Authorization

Simplifies communication between you and your homeless/migrant liaison to expedite the approval process



Summer Food Service Program (sign-ups)

Streamline your enrollment process for internal and external programs, track meal counts, distribute meal preparation loads, apply employee seniority to assignments, and much more.



Cafeteria Site Inspections

Complete inspection forms online (state or local format) for annual site reviews. Allows districts to identify and track corrective actions and easily compile statistics for reporting and analysis.



Custom Forms and Processes

Experienced PcsFORMS consultants will analyze your current workflow and paper based processes to design automated electronic solutions.

F & R Application Choices from PCS



- **ApplyNOW** Wizard style online application
- **PcsForms Online** application matching your district form
- **PcsForms Paper** application matching your district form
- **PcsForms archive** for ApplyNOW in USDA format
- **ApplyNOW & PcsForms On demand Eligibility status letter**

Win! Win! PCS provides customers with the choice of form and wizard based F & R applications while providing money saving scanning solutions at the same time. No more red lines or two color printing! All choices are fully integrated with RightNOW/RIGHTrak modules.

Match the federal form, your state form, or create your own. Even save our ApplyNOW web wizard online app to your local form based format for ease of archiving, retrieval, and audit. You can even process faxed applications or copy existing forms as your document! PcsForms makes it easy!

For scanned paper applications, PcsForms for free and reduced uses a combination of ICR (intelligent character recognition), OCR (optical character recognition), and OMR (optical mark recognition) to expedite the data entry associated with processing applications and decreases the overall time required to determine a student's eligibility status. You also have the option of prepopulating applications with household information to speed entry and reduce errors.

Batch Processing - Batches of free & reduced meal applications are configured in our custom scanning interface. Designed for high-volume forms processing, batch processing gives you complete control over document capture and data collection. You can change the sequence of batch images, delete bad images, add new images to a batch and even add attachments. Because application number assignment is generated using batch information, applications can easily be filed by batch, eliminating the time spent on alphabetized filing.

The image shows a detailed form titled "2005-2006 Family Application for Meal Benefits (Uso de la familia para las ventajas de la comida)". The form is divided into several sections:

- PART 1 - STUDENT INFORMATION:** Includes fields for First Name, Last Name, MI, NCWISSE ID Number, Date of Birth, School, Grade, and checkboxes for Homeless, Migrant, or Runaway status.
- PART 2 - HOMELESS, MIGRANT OR RUNAWAY CHILD:** A section for students who are homeless, migrant, or runaway, with instructions to fill out a separate application for each Foster Child.
- PART 3 - FOSTER CHILD:** A section for Foster Children, with fields for Foster Child's Name, NCWISSE ID Number, Date of Birth, School, and Grade.
- PART 4 - ALL OTHER HOUSEHOLD MEMBERS:** A table for listing other household members, including their name, date of birth, and income information.
- PART 5 - ADULT HEAD OF HOUSEHOLD:** A section for the adult head of household, including fields for Signature, Date Signed, First Name, Last Name, Home Phone, Mailing Address, City, State, and Zip Code.
- PART 6 - WAIVER OF PRIVACY ACT:** A section for the adult head of household to give permission for the school to use their information.
- PART 7 - RACE / ETHNIC IDENTITY:** A section for the adult head of household to indicate their race or ethnicity.
- PART 8 - LANGUAGE PREFERENCE:** A section for the adult head of household to indicate their language preference.

See **ApplyNOW** Wizard based F&R application description of the next page.

ApplyNOW F&R Online Apps

Available to all users through the PayPAMS Parent Portal, parents and guardians can apply online and may open a PayPAMS account to conveniently check the status of their application and print their status letter.



ApplyNOW provides a safe and secure web portal for parents and guardians to apply for their student's eligibility status for reimbursable meals. The application process is quick and easy. In a few short steps the application is done and electronically signed. F & R staff can then review applications faster than ever.

This online application incorporates many of the USDA F&R Prototype application best practices. A "wizard" walks the user through the process, resulting in a complete, error free application that is ready for district personnel to qualify via automated processes in RightNOW/RIGHTrak central office.

With **ApplyNOW** personal information is protected using encryption technology. Parents can rest assured that their information is safe. To learn more about how information is protected, parents can click on a Security link on the application page to view our encryption methods.

Save time, money, and labor

- Eliminate paper applications altogether!
- Save on printing and postage.
- No distribution hassles.
- No daily pick up of apps from each school.
- No application review and calls to parents for missing information. The software checks for complete information before the next step can be taken.
- Process apps at a click of a button.
- Option for District to upload student eligibility status for parents to view, with eligibility letter available for download and printing.

Integrates with PosNOW for both RightNOW and RIGHTrak F & R application processing modules

- Applications submitted automatically flow into the processing software at the click of a button.
- Eligibility status flows to the POS automatically within minutes.

Online Application

Thank you for submitting your application!

Your Confirmation Number is ON9VJ20140401T08:50:39.507

If you have further questions please contact the District Child Nutrition Office

[Click here to print](#)

[Homepage](#)

Special Diets

Allergen, Food Sensitivity and Cultural Preference Management for K-12



PCS' Special Diets allergen management system allows nutrition departments to accommodate the requests of school boards and parents to take on the responsibility of allergen tracking and provide tailored meal plans for shared allergy groups as well as individual "at risk" students.

Facilitate Critical Communications between doctors, school nurses, menu planners, dieticians, school cafeteria managers, and parents.

- Automatically emails custom menu plans to managers, nurses, and parents
- Alerts managers and nurses to diet changes in student records and allows them direct access to student information
- Automatic tracking of all communications provides critical audit capabilities

Nutrition and Allergen Support

- Scan and archive nutrition fact sheets and ingredient labels to speed data entry and increase accuracy

PcsFORMS - powered by OpenText - utilizes the latest technology to provide business automation solutions for almost any paper or forms based process.

- Automatically read allergen information extracted from ingredients lists
- Integrates with menu planning and nutrition software in order to link allergens with items, recipes, and menus
- Provides list of menu items in conflict with any allergen
- Highlights menu items within menu cycles that conflict with any allergen

Student Allergen Database

- In addition to allergens - supports individual food sensitivities, texture requirements and cultural preferences
- Scans Doctor's Diet Orders for digital processing and archiving, with easy click to view retrieval
- Utilizes student information from SIS or POS
- User friendly updating of existing allergen information for ongoing student record maintenance

Automatic allergen extraction from nutrition fact sheet PDFs and labels

The screenshot displays the PcsFORMS interface. On the left, a nutrition label for 'WHOLE GRAIN CHICKEN CORN DOG' is shown, including a product photo, description, and a detailed 'Nutrition Facts' table. The label lists ingredients such as chicken, corn, wheat, and various additives. On the right, the PcsFORMS software interface is visible, featuring a 'Basic Description' field with the product name, a 'Label' field with the full ingredient list, and a comprehensive list of allergens categorized by type (e.g., Wheat, Gluten, Eggs, Dairy, etc.). The interface allows for the selection and tracking of allergens associated with specific food items.



Special Diets quickly and easily identifies potential menu conflicts for individual students whether the menu item consists of a single ingredient, recipe, or a full salad bar.

Here's how we do it - Special Diets downloads Menu information from PCS' TrakNOW Nutrition and Inventory program or from any other compatible menu planning software you may be using. Then the software analyzes scanned data including critical nutrition information contained in food item fact sheets and ingredient labels. Special Diets automatically recognizes and extracts the allergens, food sensitivities, and any other factors you have tagged for detection. The tagged items can be as simple as the primary eight (8) allergens that everyone is familiar with or can be an unlimited number of additional allergens and other factors.

Diet Order Management - Student diet orders signed by their doctor are scanned so that student's diet information can be captured and saved to the student record along with an image of the scanned student diet order. Acknowledgement of the receipt of the Diet Order is emailed to parents.

Allergen Management - The system automatically compares the allergens and other factors recorded for the student with each food item that is used in the menu. Reports are generated to identify menu items that should be avoided as well as suggestions for menu substitutions. These reports are distributed via email to cafeteria managers, nurses and parents, with support for multiple school assignment. School nurses and cafeteria managers also have direct access to the information, via logging into the system.

Completing the loop - Finally, a suggested POS message is provided to the cafeteria manager in order to alert cashiers of specific information pertaining to this student. Allergen tagging of POS items is already provided for schools that itemize their POS selections

Dear Manager,

Subject: Procedure for students with Peanuts, TreeNuts, MilkFluid, Shellfish allergy for the 2016-2017 school year.

I have received a diet order for <studentname> (<studentID>) and it has been processed.

Please make the following notations in POS for this student

Terminal display: Dairy Ease LF Milk; Allergy to Peanuts, TreeNuts, MilkFluid, Shellfish; Pureed meals

Dietary Restriction: Lactose Intolerance - No Fluid Milk; No Peanuts, No TreeNuts, No MilkFluid, No Shellfish containing products

Additional instruction if applicable:

- Provide 1 carton of Dairy Ease Lactose Free milk with breakfast and lunch. Dairy Ease is available from the milk company. The box contains 12 half pint and the expiration date is longer than regular milk.

Special Diets Management

pcsforms

Food Items & Menus Students User Admin Database Management Action Items

Items, Ingredients and Labels

One Week Cycle Menus

Multi-Week Cycle Menus

Special Diets Management
PCS Demo / Test District

Allergy Group Selection Allergy Group Details Student Info

Student: 2952654212 Gabriel Mathenge
School: East Mecklenburg High
Gender: Male Grade: 8 DOB: 01/09/2003
Menu Plans - Brk: HS 9-12 Brk Lun: HS 9-12 Lun
Form Scan Date: 11/02/2016
Scan Batch: 12614 - 9 [View Diet Order](#)

☒ Review complete, OK to send letters
Send Mgr. Email: aaron.taylor@cms.k12.nc.us
Send Parent Email: CAROLINEMATHENGE@YAHOO.COM
Print Mgr. Letter Print Parent Letter

Communication History:

Date	Communications Notes
08/01/2017	Talked with mom about student's needs
08/02/2017	Talked with mom again about student's needs

Student Notes:

Other Dietary Restrictions

☐ Texture ☐ Vegetarian
☐ Concentrated Sweets
☐ Other Special Needs

Texture

☐ Chopped ☐ Ground
☐ Pureed

Diagnosis

☐ Food Intolerance
☒ Food Allergy

☐ Life Threatening Food Allergy
☐ Ingestion ☐ Contact
☐ Inhalation

☐ Disability
☐ Other

Meals Provided

☒ Breakfast ☒ Lunch
☐ Snack
☐ Won't eat in school cafeteria

Disability Plan On File? No

Student Allergens: Dairy, Egg

☐ Wheat ☐ Tree Nuts ☒ Dairy ☐ Coconut
☐ Gluten ☐ Peanuts ☒ Uncooked Dairy ☐ Coconut Oil
☐ Barley ☐ Corn Ingredient ☒ Cooked Dairy ☐ Sesame Seed
☐ Malt ☐ Corn Major Ingredient ☒ Cheese ☐ Soy Protein
☐ Oat ☐ HFCS ☒ Yogurt ☐ Soy Lecithin
☐ Rice ☐ Corn Syrup ☒ Milk Fluid ☐ Shellfish

Dear Manager,

Subject: Procedure for students with MilkFluid, EggWhole, Fish, Shellfish allergy for the 2016-2017 school year.

I have received a diet order for <studentname> (<studentID>) and it has been processed.

Please make the following notations in POS for this student

Terminal display: Allergy juice; Allergy to MilkFluid, EggWhole, Fish, Shellfish
Dietary Restriction: Milk Allergy - no fluid milk; No MilkFluid, No EggWhole, No Fish, no shellfish containing products

Do not serve student the items listed below. Offer an alternate menu item. Please refer to additional instructions if applicable below.

- Egg & Cheese Toast w/Turkey Bacon
- French Toast
- Mini French Toast
- Chef Salad w/Flatbread
- Chicken Caesar Chef Salad w/Flatbread
- Fish Nuggets, Crispy
- Fish Sandwich
- French Toast & Cheese Portion (9-12)
- French Toast & Cheese Portion (Prnk-8)
- French Toast & Sausage (9-12)
- French Toast & Sausage (Prnk-8)
- Caesar Side Salad
- Caesar Dressing, Portion Cup

Additional instruction if applicable:

- Provide 1 (6.75oz) allergy juice with breakfast and lunch. You will order this from TrakNow.
- CMS cafeterias do not serve any items that contain shellfish.

A copy of this instruction should be kept in your office in a diet order folder marked as diet order instruction. This instruction is to be used as a reference only for you and your staff for the remaining of this school year.

Please ensure that at least 1 other staff member has been trained to prepare this diet order meal when you are not available.

A new diet order form (LMS web site) is required yearly for all students with diet medication needs.



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Catering Management

Say goodbye to messy spread sheets. Online order processing provides central approval, automated confirmations, & invoice generation



PcsForms, powered by OpenText, utilizes the latest technology to provide solutions to almost any paper or forms based process. Our Catering Management forms automate tasks and eliminate steps providing a streamlined process that makes it easy for you and your catering customers to manager orders and billing.

- ✓ Customizable online order form
- ✓ Real-time order alert to catering manager
- ✓ Automatic confirmation of reviewed order
- ✓ Supports quick entry of repeat orders
- ✓ Flexible workflow supporting multiple approval levels
- ✓ Automatic invoice generation
- ✓ Smartphone integration
- ✓ Electronic archive of orders

A smartphone screen showing the pcsforms Catering form. The form includes sections for "CATERING", "REPEAT ORDER", "EVENT DATE", "EVENT INFORMATION", and "SETUP and DELIVERY". It also has fields for "Order Number", "Event Date", "Name of Event", "Site Location", "Location/Room", "Number of Participants", "Actual Time", "Service Time", and "Event Finishes".A paper catering order form from pcsforms. It includes sections for "BREAKFAST", "LUNCH", "CATERING ORDER CONFIRMATION", and "A LA CARTE ITEMS". It also has fields for "Order Number", "Event Information", "Billing Information", "Event Date", "Event Location", "Event Time", "Event Finishes", "Actual Time", "Service Time", and "Event Finishes".

Household Survey for CEP Schools

Maximize funding for your District with online or scannable paper surveys to replace Free and Reduced applications for CEP schools



PcsForms, powered by OpenText, utilizes the latest technology to provide solutions to almost any paper or forms based process.

Our Household Survey forms make it easy for Food Service or other District staff to gather and process household income information. The household survey workflow is very similar to Free and Reduced applications processing.

- ✓ Customizable online & scannable forms
- ✓ Integrates with enrollment systems
- ✓ Prepopulate survey forms to reduce errors and speed information entry for parents
- ✓ Smartphone and tablet integration
- ✓ Flexible workflow for easy review of surveys
- ✓ Identifies non-respondents for additional mailings or emails
- ✓ Reports for school principals
- ✓ Electronic archive of orders
- ✓ Custom export formats




Homeless/Migrant Authorization

Simplifies communication with homeless/
migrant liaisons staff to expedite the approval
process for certification of free status



PcsForms, *powered by OpenText*, utilizes the latest technology to provide solutions to almost any paper or forms based process.

The Homeless, Migrant, Runaway online form automates tasks, providing workflows that eliminate steps for a streamlined process that makes it easy for you and your homeless/migrant liaisons to communicate effectively.

- ✓ Easy to use web hosted form
- ✓ Provides authenticated secure access for your homeless / migrant liaison
- ✓ Prepopulates student information, reducing time & errors
- ✓ Real-time database lookups
- ✓ Notifies liaisons to current status
- ✓ Digital signature approval
- ✓ Automatic workflow routing to appropriate staff
- ✓ Electronic archives for audit, tracking and accountability.

A screenshot of a computer monitor displaying the "Homeless Student Authorization Worksheet" form. The form includes a table with columns for Student ID, First Name, Last Name, DOB, Find ID, Campus / Site, Grade, Status, and Appld. The table contains several rows of student data. Below the table, there are fields for Signature, Date, and buttons for "Print a Copy", "Submit", and "Go". There are also links to "Click - to remove rows" and "Click + to add rows".

Student ID	First Name	Last Name	DOB	Find ID	Campus / Site	Grade	Status	Appld
133	GARY	ARENDELL	11/17/2008	Find ID	P C S Elementary School	2	REDUCED	436484
124	CHRISTOPHER	AKRE	2/19/2009	Find ID	P C S Elementary School	5	PAID	
130	MANDY	ANDERSON	8/25/2004	Find ID	P C S Elementary School	5	PAID	
125	JOSEPH	ALEXANDER	2/15/2006	Find ID	C A Demo School	6	PAID	
122	HUGHGOT	NOGRADE	12/25/2001	Find ID	Biddford	3	PAID	
121	TIFFANIE	AAMOLD	2/1/2003	Find ID	Mobility School	1	PAID	
123	NOAM	AKHBARI	1/25/2007	Find ID	Biddford	4	FREE	436436546
124	CHRISTOPHER	AKRE		Find ID	Zamorano Elementary	5	SNAP	654854435

Summer Food Service Program

Streamline your SFSP Sign-up process for district and community programs



PcsForms, *powered by OpenText*, utilizes the latest technology to provide solutions to almost any paper or forms based process. Our Summer Food Service Program online sign-up forms automate tasks and eliminate steps. A streamlined process makes it easy for you and your staff to maintain compliance while gathering all the information necessary to on-board your feeding sites.

- ✓ Eliminate complicated spread sheets
- ✓ Provides online application forms for internal and external programs
- ✓ Flexible workflow supporting multiple approval levels
- ✓ Maintains one central database for all users to access
- ✓ Easily distribute meal preparation loads across kitchens
- ✓ Track meal counts
- ✓ Includes sign ups for staff looking for summer employment
- ✓ Tracks employee seniority to assist in assignments
- ✓ Automatically emails State Sponsor Site Agreement form to the program participant with digital signature capability
- ✓ Provides automated collection of information for background checks
- ✓ Includes online state pre-operation inspection form
- ✓ Smartphone integration
- ✓ Electronic archive of all documents

A screenshot of a computer monitor displaying the PcsForms web application. The interface is titled "Celebration High School" and "0127 1809 CELEBRATION HIGH SCHOOL". It features several tabs: "Site Information", "Program Information", and "Contact Information". The "Site Information" tab is active, showing fields for "Central Kitchens" (Celebration High Sch), "School or Community" (S), "Nonprofit" (n/a), "Site / Meal Type" (O), "Total Enrollment" (150), "Meal 1" (BREAKFAST), "Meal 1 Serving Time" (7:00 AM - 7:30 AM), "Meal 2" (LUNCH), "Meal 2 Serving Time" (11:30 AM - 12:00 PM), "Serving Days" (Monday, Tuesday, Wednesday, Thursday, Friday), and "Notes". The "Program Information" tab is also visible, showing "Number of Programs" (2), "Program Dates" (6/9/2014 to 8/8/2014), "Field Trips", and "Program Enrollment" (150). The "Contact Information" tab shows fields for "Primary" and "Alternate" contacts. The interface includes "Close Form" and "Exit" buttons at the top right.

Cafeteria Site Inspections

Complete inspection forms online for annual site reviews using your state or district format for easy auditing. Identify and track corrective actions and easily compile statistics for reporting and analysis.



PcsForms, powered by OpenText, utilizes the latest technology to provide solutions to almost any paper or forms based process.

Our Cafeteria Site Inspection forms are designed for easy online entry utilizing the convenience of tablets or conventional computers and laptops.

- ✓ Customizable online & scannable Forms
- ✓ Smartphone and tablet integration
- ✓ Built-in calculations for financial reporting of fiscal performance
- ✓ Customizable scoring for important evaluation metrics including food cost, operating ratios such as cost per meal & labor hour, etc.
- ✓ Sign with your finger, "wet signature integration"
- ✓ Automatically generates corrective action plans
- ✓ Tracks corrective actions required
- ✓ Flexible workflow for easy review and approval of inspections forms
- ✓ Electronic archive of inspections

A tablet displaying the "Cafeteria Site Inspection Form" from pcsforms. The form includes fields for "Select One", "Sponsor Name", "Sponsor Site", "Sponsor Number", and "Date of Review". It also has sections for "Check Meal Service", "Breakfast", and "Lunch", with various questions and radio button options for "Yes", "No", and "NA".

Data visualization - charts highlight statistics for easy identification of problem areas

"Wet signature" support allows electronic signatures to be collected for every inspection.

A form showing two sections for signatures. Each section has a "Manager" signature field with a "Wet signature" icon, a "1st Follow Up" field, a "Corrective Action Status" dropdown menu, and a "Reviewer Signature" field. There is a "Print a Copy" button and a "Submit" button at the bottom.

Account Collection Management

Low Balance Notifications
Negative Balance Tracking
Collections Management
Reporting

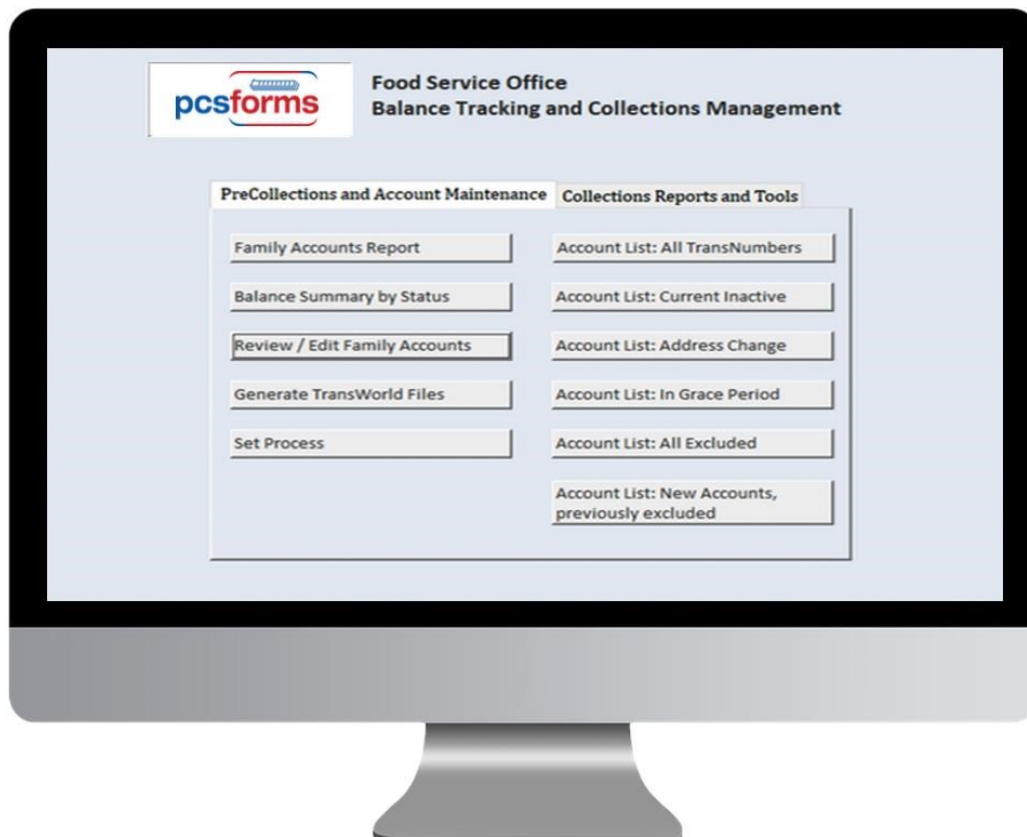


PcsForms, *powered by OpenText*, utilizes the latest technology to provide solutions to almost any paper or forms based process.

Reduce negative balances in compliance with District and State policies for managing student meal account debt. Generate personalized email and paper notifications, aging reports, payment alerts, and collection agency exports.

- ✓ Integrated with your POS
- ✓ Automated notifications
- ✓ Daily or weekly aging reports
- ✓ Customizable debt level tracking
- ✓ Configurable business rules for collection procedures
- ✓ Integrated collection letters
- ✓ Definable frequency escalation

Helps eliminate overt identification of negative balances at the serving line



U.S. Public School System Applies Intelligent Forms Automation Solution to Student Nutrition

Charlotte-Mecklenburg Schools saves time and reduces risk with OpenText® LiquidOffice and OpenText® TeleForm

Charlotte-Mecklenburg Schools (CMS) is located in the Charlotte, North Carolina region and provides academic instruction to more than 148,000 students in pre-Kindergarten through Grade 12 in 170 schools throughout Mecklenburg County. Each day, approximately 19,000 CMS employees guide their students according to the highest standards, earning CMS widespread acclaim as one of America's best school districts.

Background

Approximately 1,400 employees work in the Child Nutrition Services department at Charlotte-Mecklenburg Schools (CMS). Their mission is to contribute to a successful academic experience and encourage a lifetime of healthy eating by providing affordable and nutritious student meals. Each day, they provide 36,000 breakfasts and 78,000 lunches to students, totaling more than 20 million meals a year. To manage the growing volume and complexity of students' nutritional needs, CMS, with the help of PCSForms Division from partner PCS Revenue Control Systems (PCS), streamlined and automated its manual processes with OpenText LiquidOffice and OpenText TeleForm to save time, improve service, and reduce risk.

Challenge

Increasing volume of application forms

The CMS Child Nutrition Services department might be compared to a restaurant chain with 170 locations. Menus are designed and approved by a menu committee, and meals are computer analyzed to ensure they meet federal nutrition guidelines. However, unlike a restaurant, menus are customized to accommodate students with special dietary needs. In recent years, student volumes and special requirements have outgrown the staff's manual, paper-based processes.

INDUSTRY

Education

CUSTOMER

Charlotte-Mecklenburg Schools

PARTNER

PCS Revenue Control Systems

CHALLENGES

- Rising application volumes outgrowing existing processes
- Inefficiencies and delays with manual, paper-based processes
- Increased risks with manual data capture and workflows

SOLUTIONS

- OpenText® LiquidOffice
- OpenText® TeleForm

BENEFITS

- Digitized processes increase productivity, resulting in time and cost savings
- Time redirected to more value-added activities
- Full process visibility and audit trails help reduce risks
- Ability to process 13 times more simple diet order forms per day



“I used to process 10 to 12 of the simple diet order forms in a day, but now I can do more than 20 in an hour.”

LILIANA MYERS, DIETETIC TECHNICIAN, CHARLOTTE-MECKLENBURG SCHOOLS

Catherine Beam, Executive Director for Child Nutrition Services at Charlotte-Mecklenburg Schools, explains that they began the process of automating and streamlining paper-intensive processes several years ago: “All of this started when free and reduced meal application processing was moved from the individual schools to the central office. We were getting roughly 32,000 paper application forms that had to be processed within 10 days of receipt. There was no way to handle that manually.”

Solution

Intelligent forms automation

Enter PCS (or PCS Revenue Control Systems, Inc.), a nationwide provider of K-12 school food and nutrition services technology and valued OpenText partner. The school board enlisted PcsForms, a division of PCS, to deliver a solution for processing meal application forms. PcsForms deployed LiquidOffice and TeleForm.

TeleForm is an intelligent forms automation solution that provides a paper on-ramp for document and forms-driven processes using powerful design, capture, and recognition technologies to eliminate time-consuming manual data entry, improve efficiency, and control costs. Organizations can easily handle thousands of forms a week using automatic classification and data extraction, and can update integrated systems with accurate validated information.

LiquidOffice is an intelligent forms automation solution that enables organizations to automate people and forms driven processes using electronic forms and workflow capabilities for improved efficiency, control, and customer satisfaction. LiquidOffice integrates with TeleForm to bridge paper and digital worlds and deliver end-to-end intelligent forms automation solutions.

Automatic allergen management system

Managing special dietary requests for students used to be a particularly manual and time-consuming task for CMS. The process hinges on the Diet Order form, which lists a student's allergies and dietary restrictions, and must be signed by a doctor. In recent years, increasing numbers of students required dietary modifications, leaving CMS staff overwhelmed by the Diet Order submissions. “We typically receive 1,200 to 1,300 Diet Order forms in the first six weeks of school. The stack of papers is huge. The complicated ones take much longer than the simple ones, so we were hoping to be able to process the simple ones more efficiently in a batch,” says Margaret Cameron, Wellness and Marketing Specialist at CMS.

The solution offered by PCS and powered by LiquidOffice and TeleForm was robust enough to handle their growing volumes but simple enough for staff to use and manage.

Benefits

Top marks in digital transformation

At the start of the 2016/17 school year, CMS launched its new end-to-end allergy management system. Incoming documents, including the diet order form, are scanned in and all outgoing documents such as confirmations and menu plans are handled automatically via the system. The Child Nutrition Services department has seen dramatic benefits with OpenText intelligent forms automation, including process acceleration, cost reduction, and lowered risk.

Automated processes save significant time

The once cumbersome, paper-based process of managing special dietary requests is now a smooth, automated process. Employing state-of-the-art digital scanning and online processing, the solution facilitates communication between doctors, nurses, dietitians, managers, and staff, and integrates nutrition requirements, menus, and point-of-sale (POS) systems. Dusty Swan, Product Manager, PcsForms explains, “It used to take CMS an extraordinary amount of time to generate letters and custom menus. They had a huge spreadsheet for more than 900 students at 170 schools, which they emailed to each site manager individually. For each student, they would generate a new Microsoft® Word document and attach the applicable doctors' note. The Teleform AutoMerge Publisher feature allows them to customize it for one set of allergies based on the record, automating the process and cutting down dramatically on manual work.”

Liliana Myers, Dietetic Technician at CMS, describes the speed of the new solution: “I used to process 10 to 12 of the simple diet order forms in a day, but now I can do more than 20 in an hour. The process now involves simply scanning the incoming orders, verifying the allergens in the system, merging records and then sending out a batch of pre-formatted emails.” Cameron continues, “Being able to scan the diet orders eliminated another cumbersome part of the process which was managing the mass of paper that was flooding our fax machine and courier mail. We can get them scanned so much faster than doing it by hand. When I look at last year versus this year, my time was down by more than half.”

Another manual step in the data capture process that has been automated is the tracking of food ingredients. Today, the team can scan ingredient labels and the solution automatically reads allergen information extracted from the ingredients list. It integrates that with menu planning to highlight menu items that conflict with allergies. "Once it reads the ingredients, it finds all of the different allergens that they track and automatically checks them off. That saves a lot of time," says Swan.

In the past, the team used a Microsoft® Excel® spreadsheet and manually marked every ingredient from each food label. Now, they scan the labels and the solution tells them which allergens are present. It reduces the time spent in half.

Tracking and auditing enables process visibility, reduces risks

Another key benefit of accurate data capture has been the audit trail that staff can now follow. The liability risk associated with managing students' allergies and special diets is extremely high, and documentation is critical. Cameron describes how the solution helped with a recent concern over a student's allergies: "I was able to go to the database and search for the student. Everything was right there. I found where I had typed in my notes, the phone conversations that I had with the mother and the doctor, the Diet Order form, the supporting documents, and the letters and menus that we sent via email to the manager and the parents. I was able to show exactly what we did and why. We could be confident that we had done the right thing since all the information was in one place with a full audit trail available."

Improved customer service

With all the information at their fingertips, the team can provide better service to stakeholders. The time savings also allow staff

to focus on value-added activities such as enhanced service. "We're able to provide more verbal support to the managers. They receive written instructions, but we have time now to address more complicated cases over the phone. In the past, there might have been uncertainty, and we couldn't address those concerns quickly. Freeing up my time has enabled me to instruct managers personally, which has been really helpful for them," explains Cameron.

Bonus marks for surpassing expectations

Building on the success of the special diet program, CMS applied the OpenText intelligent forms automation solution to its Summer Food Service Program. With close to 200 sites providing food services every summer, CMS wanted to improve the site registration process, which was taking one person three months every spring. "There was a sign-up process with a lot of paper that had to be managed," says Beam. Now, the registration process is online and is already yielding positive results. "It was deployed just this week, and we already have customers signed up. In fact, the team has seen faster responses than when they used to send a large paper application packet," reports Beam.

Future

As the CMS school board looks to the future, Child Nutrition Services is seeking out other opportunities to streamline data capture and workflow processes. "I'm very interested in what else we might take a look at, given the success of the Diet Orders and Summer Food Service Program," says Beam. A document management system to more efficiently store the significant volume of documents may also be on the menu. The team is committed to taking whatever steps are necessary to fulfill its goal of healthy and safe nutrition for its students.



PCS Revenue Control Systems is a leader in school food and nutrition technology, providing a complete and fully integrated line of products and services to the K-12 market. System solutions include; PcsForms – Student Allergen and Special Diet Management, Free & Reduced Scanning and Web Apps, Catering Management, School Inspections, Household Surveys, and digital document management for and business process; PayPAMS – Parent Portal for Web Pre-payment and Free and Reduced Meal Applications; POSNOW – Point of Sale, Vending, Payment Kiosks, Meal Accountability, Claims, and enrollment interfaces; TrakNOW – Menu Planning, Production and Nutrition, Supply Chain Management, Inventory Management, Central Kitchen and Central Distribution. Sales and support services are provided nationwide through regional offices and corporate offices located in Englewood Cliffs, New Jersey.

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