

# Resident Dining Solution Help Manual

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Delivering peace of mind,  
one meal at a time.



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# Introduction

Welcome to MonarqRC's Resident Dining Solution (RDS), a comprehensive, web-based foodservice system designed to automate dining operations, elevate resident satisfaction, improve food safety, aid production and increase the overall efficiency of foodservice staff. RDS is a cost-effective and feature-rich solution that can deliver the kind of automation functionality which was previously exclusive to larger acute care facilities. RDS maintains vital food and nutrition information including tray cards, tray tickets, nourishments, allergies, likes, dislikes, calorie counts, tube feeding, guest trays, feeding assistance devices and menu selections.

In this chapter you will learn about ...

- Software Basics
- On-Line Help Manual
- Application Support
- Using the Mouse

## Software Basics

This manual includes basic information that applies to all Resident Dining Solution (RDS) and RDS Elite systems. Depending on the software package that you have, some of the features explained in this manual may not be available in your software package. If you see available functionality that you want, but do not currently have, please contact the MonarqRC Sales Team at (855) 836-4717 for information about upgrading to additional functionality.

## Help Manual

This manual can be accessed from the RDS application by clicking  on the navigation bar. The manual is available for download on the RDS Documentation page.

## Application Support

If you have questions regarding the software, please call the MonarqRC support line at (855) 203-7034. Support is available Monday to Friday, 7:00 AM to 7:30 PM Eastern time (excluding major United States holidays).

A Support Specialist can answer your questions or lead you through the steps to identify and solve a problem.

If you encounter a problem, try to recreate it while writing down what was entered in each field, as well as the options selected. If the problem occurs a second time, call the support line.

It is important to know what you did before the problem occurred; therefore, write down any error messages (exactly as they appear), field entries, selected options, and clicked buttons. This information, as well as any other information you may have, will be extremely helpful when you call the support line.

Give the Support Specialist your name and the name of your organization. Write down the name of the Support Specialist who helped you in case you need to call back.

To determine the source of a problem, the usual strategy taken by the Support Specialist is to investigate the most obvious causes first. If the problem is not readily solved, more detailed troubleshooting becomes necessary. Be prepared to work through the problem; be at the computer ready to explain the situation, answer some questions, and follow instructions. In addition, be prepared to have the Support Specialist step through the same sequence that led to the problem.

You may be asked to identify operating system and web browser versions.

## Using the Mouse

The mouse conventions used in this manual assume that the left mouse button has been programmed as the primary mouse button. When the instructions state to click the mouse, use the left button. When the instructions state to right click, use the right mouse button.

# Entering and Exiting the Software

To access the RDS website, your operating system and web browser must meet the minimum system requirements.

In this chapter you will learn about ...

- System Requirements
- Entering the Software
- Exiting the Software

## System Requirements

Operating System	Microsoft® Windows® 7 Microsoft® Windows® 8 Microsoft® Windows® 10 Apple® OS X 10.9
Browser	Google Chrome® Version: 30+ (Recommended for best user experience) Internet Explorer® 11 Internet Explorer® 10* (See note below) Mozilla Firefox® Version: 27+ Safari® Version: 7+

**\*Note:** Beginning January 12, 2016, Microsoft will no longer support or provide security updates for Internet Explorer® 10. The RDS application will continue to function on Internet Explorer® 10, however, users may be subject to security risks outside of MonarqRC's control. It is recommended that users upgrade to the latest browser version in order to avoid security vulnerabilities and heightened risks.

Internet Explorer® 10 requires TLS v1.1 and TLS v1.2 support enabled in Advanced Settings.

Within the IE browser, go to Tools > Internet Options

Click on Advanced tab

Scroll down in Settings to find 'Use TLS 1.2' and 'Use TLS 1.1'

Check to enable 'Use TLS 1.1' and 'Use TLS 1.2'

Uncheck to disable 'Use TLS 1.0'

Click Apply

Click OK

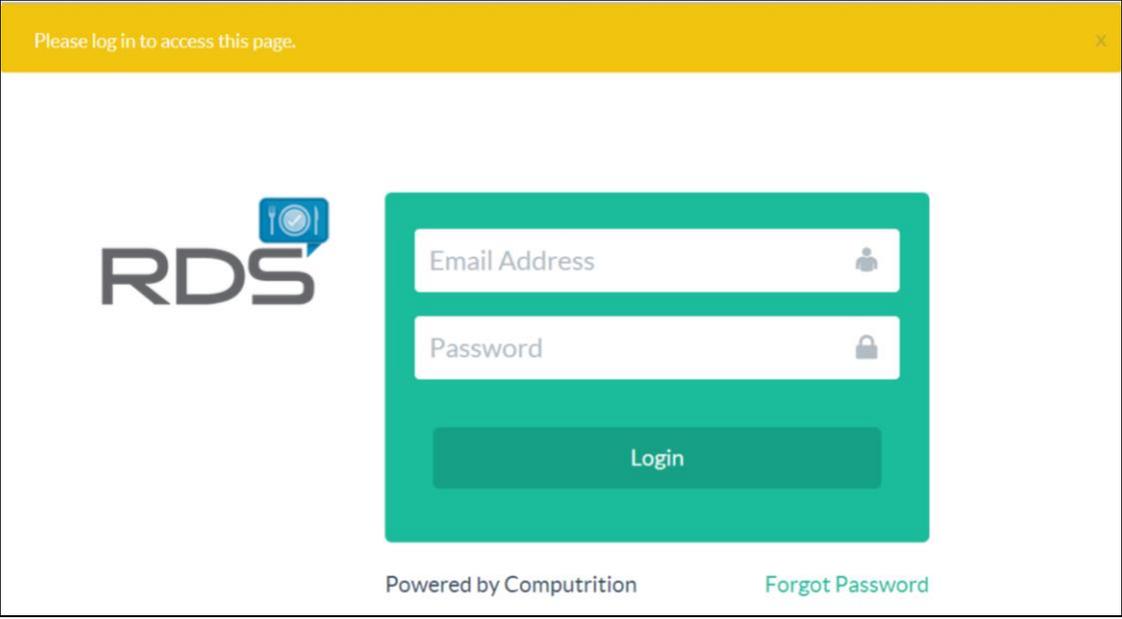
Regardless of the computer or mobile operating system, most recent versions of Google Chrome®, Mozilla Firefox® or Safari® will work with RDS.

For the best user experience, Google Chrome® is the recommended and preferred browser. Visit [www.google.com/chrome](http://www.google.com/chrome) to download. Follow the on-screen installation instructions.

## Entering the Software

Once your operating system and web browser has been verified against the system requirements, open the web browser and type the RDS URL provided to you during the training session and welcome email directly into your browser. The RDS URL closely resembles the following hyperlink, <https://abc.rdsapp.com>, and is specific to the facility.

1. Enter the Username/Email Address provided to you
2. Enter user specific password
3. Click **Login**



Please log in to access this page.

**RDS**

Email Address

Password

Login

Powered by Computrition

[Forgot Password](#)

If you have forgotten your password, contact the RDS system administrator at your facility. The facility system administrator has access to resetting user passwords. If you are the RDS system administrator for the facility, contact the MonarqRC support line at (855) 203-7034.

## Password Policy

The password policy specifies to the required length and complexity of your RDS password. You should always create a strong password – longer and more complex is best.

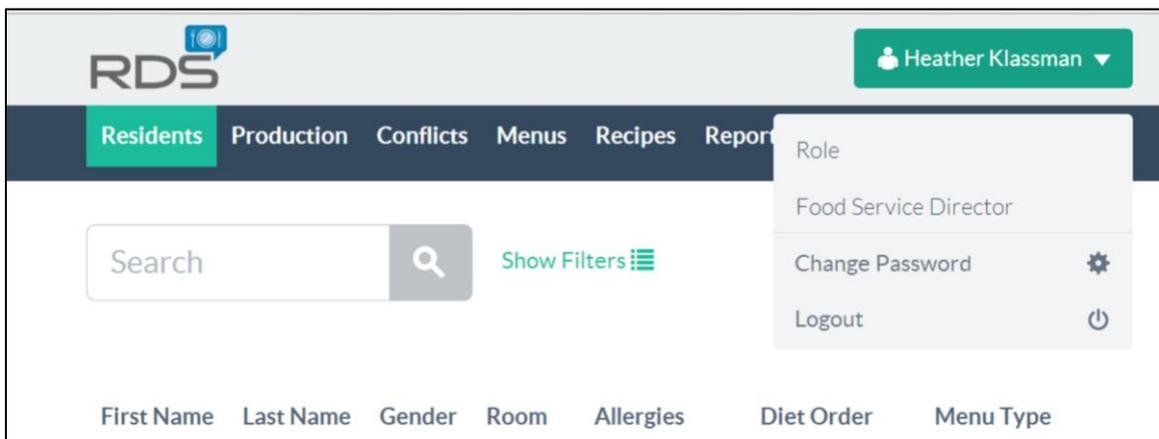
- Password Length – Your password has to be at least 8 characters long
- Password Complexity – Your password must contain at least one lower case letter
- Password Complexity – Your password must contain at least one upper case letter
- Password Complexity – Your password must contain at least one number
- Password Complexity – Your password cannot be common
- Password History – You cannot reuse your previous password

Passwords should always be kept secure and should not be shared. Do not write passwords down on paper. Disable ‘remember password’ or ‘autofill password’ in your internet browser. You should regularly change your password in accordance with your facility’s internal security and password age policies.

## Exiting the Software

To properly exit the software, use the log out option from the user drop down.

1. Click the button that contains the user’s first and last name in the upper right hand corner
2. Click **Logout**



To maintain Health Insurance Portability and Accountability Act (HIPAA) compliancy, the software is equipped with a ten-minute automatic logoff feature. After ten minutes of inactivity, the software will automatically log off the user forcing them to re-enter their login credentials to gain access to the software. This feature prevents unauthorized users from accessing protected information. As a general practice, users should logoff the system when their workstation is unattended.

# Administration

The administration section houses all the table data that is used throughout the software. Users with access to the administration section can customize and edit table information to meet internal guidelines, operation protocols and facility terminology. This section also contains functionality that allows the facility system administrator to create additional facility users, assign job roles and reset user passwords.

In this chapter you will learn about ...

- Roles
- Setting User Permissions
- User Setup
- Editing User(s)
- Deactivating User(s)
- Deleting User(s)
- Password Reset
- Tables
- Printing Tables
- Facility Settings
- Audit Log
- Price File Importer

## Roles

The facility system administrator has access to create roles that correspond to the permissions and type of facility users that will be logging in and accessing the software.

1. Click **Administration**
2. Click **Role** located in the navigation tabs on the left hand side
3. Click **Add Role**
4. Enter name of role
5. Enter brief description of role
6. Click **Save and Create Other** or **Save**

## Setting User Permissions

1. Click on the newly created role and click **Edit**
2. Check the specific level of permissions allowed for each section or report. Select Full Access, Read Only, or Hidden

3. Click **Save**

A Role can be assigned to the user from the Role table or from the User table.

## User Setup

The facility system administrator has access to creating additional facility users, assigning user roles and creating new users' initial passwords. Multiple users within a facility can be identified as system administrators.

1. Click **Administration**
2. Click **User** located in the navigation tabs on the left-hand side
3. Click **Add User**
4. Enter the new user's valid email address, password, first name and last name (Note: These fields are required to save the user)
5. Check **Active**
6. Select Role
7. Click **Save and Create Other** or **Save**

## Editing User(s)

The facility system administrator can edit the content of other facility user profiles such as the user's email address, first and last name, and role.

1. Click **Administration**
2. Click **User** located in the navigation tabs on the left-hand side
3. Find the user that you wish to edit from the existing user list
4. Click on the user
5. Edit email address, first name, last name, active status, roles and/or administration status (Note: The email address, first name and last name fields are required to save the user)
6. Click **Save**

## Deactivating User(s)

The facility system administrator has access to deactivating facility users.

1. Click **Administration**
2. Click **User** located in the navigation tabs on the left-hand side
3. Find the user that you wish to deactivate from the existing user list
4. Click on the user
5. Uncheck active
6. Click **Save**

## Deleting User(s)

The facility system administrator has access to permanently deleting facility users.

1. Click **Administration**
2. Click **User** located in the navigation tabs on the left hand side
3. Find the user that you wish to permanently delete from the existing user list
4. Click on the user
5. Click **Delete**
6. Click **Confirm**

**Warning:** Deleting a user from the application will remove all user actions from the audit log. If you wish to keep a log of the user's access to the application as well as the changes that were made to the application by them, follow the instructions to deactivate the user. Do not delete.

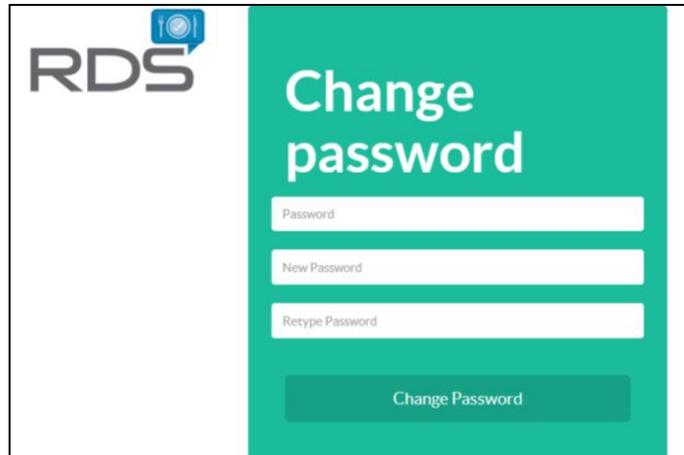
## Password Reset

The facility system administrator has the ability to reset user passwords should the facility user(s) encounter any issues logging in to the software.

1. Click **Administration**
2. Click **Reset Password** located in the navigation tabs on the left-hand side
3. Select the user that requires a password reset
4. Enter new temporary password
5. Click **Submit**

Provide the newly created temporary password to the appropriate user. When the user logs in to the software with their email address and new temporary password, the user will be prompted to change their password to something personal and confidential. Passwords should be committed to memory and not written down.

1. Re-enter temporary password provided by the facility system administrator
2. Create new personal and confidential password
3. Retype new personal and confidential password
4. Click **Change Password**



## Tables

The administration tables allow the facility to customize the information available within RDS. The software provides flexibility as facilities are unique, use differing terminology and have location specific information such as room numbers, dining areas, seating locations, etc. that requires customization. The information added into the tables directly impacts the content of the lists available throughout the software. Tables can be sorted (A-Z) or reverse sorted (Z-A) by clicking on the table column headings. All tables contain a search field providing the functionality to keyword search for specific entries within each administration table.

### Acuity Level

Acuity level typically refers to the level of severity of an illness or the level of care required impacting the allocation of staff. Users with access to the administration section of the software are able to customize this table with facility specific definitions of acuity. Users assign an acuity level to residents within the Resident Details section of the software.

1. Click **Administration**
2. Click **Acuity Level** in the navigation tabs on the left hand side
3. Click **Add Acuity Level**
4. Enter acuity level name
5. Enter acuity level description (optional)
6. Click **Save and Create Other** or **Save**

**Acuity Level Example:** Low Risk, Medium Risk, High Risk, etc.

### Area

The area table refers to the building, wing, hall, etc. that identifies the major location of residents' rooms. The area is assigned as part of a resident's room location (area + room number) in the Resident Details section.

1. Click **Administration**
2. Click **Area** in the navigation tabs on the left hand side
3. Click **Add Area**
4. Enter area name
5. Click **Save and Create Other** or **Save**

**Area Example:** North, South, East, Floor 1, Building 1, Hall 1, Terrace, Cottage 1, etc.

## Allergen

The allergen table allows the user to build a list of food categories or food items that residents within the facility are allergic to and need to avoid. Allergies are assigned to residents in the Resident Diet Order section and print on resident tray cards and tray tickets. Allergens are also assigned to recipes in the Recipe Allergen section. This allows the software to generate conflict(s) for residents that are assigned to a menu that contains recipes that are associated to the resident's allergies.

1. Click **Administration**
2. Click **Allergen** in the navigation tabs on the left hand side
3. Click **Add Allergen**
4. Enter allergen name
5. Click **Save and Create Other** or **Save**

**Allergen Example:** Milk, Eggs, Peanuts, Tree Nuts, Fish, Shellfish, Soy, Wheat, etc.

## Brand (RDS ELITE)

The brand table provides the user with functionality to build a list of manufacturers and brands that can be assigned to a vendor item. Brands are assigned to vendor items in the Items Purchasing section. Brands may be created and assigned to a nested hierarchy.

1. Click **Administration**
2. Click **Brand** in the navigation tabs on the left hand side
3. Click **Add Brand**
4. Enter brand name
5. If brand belongs to a nested hierarchy, select the parent of entered brand
6. Click **Save and Create Other** or **Save**

**Brand Example:** General Mills, Betty Crocker, Kellogg's, etc.

## Diet Order

The diet order table provides the user with functionality to build a list of diet orders that are prescribed by the physician. Diet orders are assigned to residents in the Resident Diet Orders section. The diet order may be assigned as a combination of multiple restrictions.

1. Click **Administration**
2. Click **Diet Order** in the navigation tabs on the left hand side
3. Click **Add Diet Order**
4. Enter diet order name
5. Click **Save and Create Other** or **Save**

**Diet Order Example:** Regular, 2 Gram Sodium, 60 Gram Renal, Consistent Carbohydrate, Mechanical Soft, NDD Level 1: Pureed, Nectar Thick Liquids, etc.

## Dining Area

The dining area table provides the user with the functionality to build a list of dining areas/dining rooms where residents dine and eat during meal periods. The dining area is assigned to residents in the Resident Dining Areas section.

1. Click **Administration**
2. Click **Dining Area** in the navigation tabs on the left hand side
3. Click **Add Dining Area**
4. Enter dining area name
5. Click **Save and Create Other** or **Save**

**Dining Area Example:** Main Dining Room, In Room, Dining Room 1, Dining Room 2, Bistro, etc.

## Feeding Device

The feeding device table provides the user with the functionality to build a list of feeding assistance devices available and used within the facility to aid residents during meal service. Feeding devices are assigned to residents in the Resident Meal Service section.

1. Click **Administration**
2. Click **Feeding Device** in the navigation tabs on the left hand side
3. Click **Add Feeding Device**
4. Enter feeding device name
5. Click **Save and Create Other** or **Save**

**Feeding Device Example:** Built-Up Fork, Divided Plate, Weighted Cup, Roller Knife, etc.

## Fluid Consistency

The fluid consistency table provides the user with the functionality to add fluid consistencies into the application to assign to residents as part of their diet order. Fluid Consistency is assigned to residents in the Resident Diet Order section.

1. Click **Administration**
2. Click **Fluid Consistency** in the navigation tabs on the left hand side
3. Click **Add Fluid Consistency**
4. Add fluid consistency name
5. Click **Save and Create Other** or **Save**

**Fluid Consistency Example:** Honey Thickened, Nectar Thickened, Pudding Thick, etc.

## Gender

The gender table provides the user with the functionality to add custom gender entries in addition to the application default male and female options. Gender is assigned to residents in the Resident Details section.

1. Click **Administration**
2. Click **Gender** in the navigation tabs on the left hand side
3. Click **Add Gender**
4. Enter gender name
5. Click **Save and Create Other** or **Save**

**Gender Example:** Male, Female, Transgender, etc.

## HACCP Category [\(RDS ELITE\)](#)

The HACCP category table provides the user with the functionality to add custom HACCP categories into the application in addition to the pre-populated default options. HACCP categories are used to search and assign HACCP instructions to recipe steps within the Recipe Instruction section. HACCP categories may be created and assigned to a nested hierarchy.

1. Click **Administration**
2. Click **HACCP Category** in the navigation tabs on the left hand side
3. Click **Add HACCP Category**
4. Enter HACCP category
5. If HACCP category belongs to a nested hierarchy, select the parent of entered HACCP category
6. Click **Save and Create Other** or **Save**

**HACCP Category Example:** Cooking:Poultry, Serving/Holding, Cooking: Roasts, etc.

### HACCP Instruction (RDS ELITE)

The HACCP instruction table provides the user with the functionality to add custom HACCP instructions into the application in addition to the pre-populated default options. HACCP instructions are assigned to specific recipe steps within the Recipe Instruction section.

1. Click **Administration**
2. Click **HACCP Instruction** in the navigation tabs on the left hand side
3. Click **Add HACCP Instruction**
4. Enter HACCP instruction
5. Select category
6. Click **Save and Create Other** or **Save**

**HACCP Instruction Example:** Cook to a minimum internal temperature of 165° F for 15 seconds

### Inventory Group (RDS ELITE)

The inventory group table provides the user with the functionality to build a list of inventory groups to assign to items in the Item Details section. The inventory group categorizes items into manageable groups and assists with tracking on-hand items. Inventory groups may be created and assigned to a nested hierarchy.

1. Click **Administration**
2. Click **Inventory Group** in the navigation tabs on the left hand side
3. Click **Add Inventory Group**
4. Enter inventory group
5. If inventory group belongs to a nested hierarchy, select the parent of entered inventory group
6. Click **Save and Create Other** or **Save**

**Inventory Group Example:** Dairy, Meat/Fish/Poultry, Produce:Vegetables, etc.

### Language

The language table provides the user with the functionality to create a list of languages and assign a primary language to residents in the Resident Details section.

1. Click **Administration**
2. Click **Language** in the navigation tabs on the left hand side
3. Click **Add Language**

4. Enter language name
5. Click **Save and Create Other** or **Save**

**Language Example:** English, Spanish, Chinese, French, etc.

### Likes/Dislikes

The likes and dislikes table provides the user with the functionality to build a list of food categories or food items that residents ‘like’ or ‘dislike’. Likes and dislikes are assigned to residents by the meal period in the Resident Likes and Dislikes section. The resident’s likes and dislikes print on the appropriate meal period’s tray card.

1. Click **Administration**
2. Click **Likes/Dislikes** in the navigation tabs on the left hand side
3. Click **Add Likes and Dislikes**
4. Enter likes and dislikes name
5. Click **Save and Create Other** or **Save**

**Likes/Dislikes Example:** Fish, Pork, Coffee, Strawberries, Spinach, Green Peas, White Meat, etc.

### Meal Period

The meal period table provides the user with the functionality to build a list of meal and nourishment periods offered within the facility and their associated start and end time. The starting and ending times will be used throughout the system for various purposes such as which meal to display on the Resident Menu Selection section.

It is recommended to have meal times be continuous, but not to overlap. The following is an example:

<input type="checkbox"/>	Name	Start Time	End Time	Is Nourishment Period
<input type="checkbox"/>	Breakfast	07:00 AM	09:00 AM	No
<input type="checkbox"/>	Snack 1	09:00 AM	11:00 AM	Yes
<input type="checkbox"/>	Lunch	11:00 AM	02:00 PM	No
<input type="checkbox"/>	Snack 2	02:00 PM	04:00 PM	Yes
<input type="checkbox"/>	Dinner	04:00 PM	07:00 PM	No
<input type="checkbox"/>	Snack 3	07:00 PM	09:00 PM	Yes

Meal Periods established as a non-nourishment meal period or '*Is Nourishment Period? No*' will appear in the Resident Meal Service section of the software allowing the user to assign the resident's dining area and seating location for each non-nourishment meal period.

Meal Period Example: Breakfast, Snack 1, Morning Snack, Lunch, Snack 2, Dinner, Evening Meal, Snack 3, HS Snack, etc.

## Measure (RDS ELITE)

The measure table is comprised of system measures that are used throughout the application in critical roles such as adding ingredients to recipes, scaling recipes and calculating nutrients. The measure table provides the user with the functionality to manage the active status and display name of the system wide measures. Measures that are marked as inactive will not be used within the application. Users are unable to add or permanently remove measures from the application.

1. Click **Administration**
2. Click **Measure** in the navigation tabs on the left hand side
3. Click on a measure to edit
4. Select/deselect `is_active`
5. Edit display name
6. Click **Save and Create Other** or **Save**

Measure Example: Cup, Quart, Gallon, Gram, Pound, Tablespoon, etc.

## Menu Type

The menu type table is used to enter menus and refers to the core menu/template/extension that staff should follow to build the resident's tray. The menu names must be entered into the menu type table before menus can be built and correlated to a specific menu type. The menu type is also assigned to each resident in the Resident Diet Orders section.

1. Click **Administration**
2. Click **Menu Type** in the navigation tabs on the left hand side
3. Click **Add Menu Type**
4. Enter menu type name
5. Click **Save and Create Other** or **Save**

Menu Type Example: Regular, Pureed, Soft, Cardiac, Renal, etc.

## Nourishment Route

The nourishment route table provides the user with functionality to create a custom snack delivery route, assign room numbers to the route and place the rooms in a specific sort order. Nourishment route(s) are utilized as sorting and filtering options on the Nourishment Labels Report and Nourishment Cart Report. Selecting a nourishment route as the 'sort by' option will print the nourishment labels or cart in the order the rooms were placed within the route.

1. Click **Administration**
2. Click **Nourishment Route** in the navigation tabs on the left hand side
3. Click **Add Nourishment Route**
4. Enter nourishment route name
5. Enter comments (optional)
6. Select included rooms (Tip: Holding down the Ctrl button on your keyboard allows you to select multiple rooms with the mouse)
7. Under room order, drag and drop the rooms in the desired order
8. Click **Save and Create Other** or **Save**

**Nourishment Route Example:** Snack 1 Delivery Route, Weekend Snack Route, etc.

### Nutrient ([RDS ELITE](#))

The nutrient table provides the user with the functionality to mark the nutrients in the application as active/inactive. Only active nutrients are displayed in the application and on applicable reports. The user may also sort the nutrients in a preferred order so that the nutrients are displayed in a custom order throughout the application and on applicable reports.

1. Click **Administration**
2. Click **Nutrient** in the navigation tabs on the left hand side
3. Click on a nutrient to edit
4. Select/deselect is\_active
5. Edit sort order
6. Click **Save**

**Nutrient Example:** Energy (kcal), Protein, Fat, Sugar, Sodium, etc.

### Nutrient Source ([RDS ELITE](#))

The nutrient source table provides the user with the functionality to create custom nutrient sources that may be assigned to manually entered personal nutrient profiles.

1. Click **Administration**
2. Click **Nutrient Source** in the navigation tabs on the left hand side
3. Click **Add Nutrient Source**
4. Enter Nutrient Source

5. If nutrient source belongs to a nested hierarchy, select the parent of entered nutrient source
6. Click **Save and Create Other** or **Save**

**Nutrient Source Example:** Manufacturer, Package Label, etc.

### Package Size [\(RDS ELITE\)](#)

The package size table provides the user with the functionality to build a list of package sizes that can be assigned to items. The package size is comprised of the package type, unit(s) per package and unit size measure. The package size is assigned to the item and represents how the item is packaged when purchased from the vendor (e.g. Case (12 2 Pounds)).

1. Click **Administration**
2. Click **Package Size** in the navigation tabs on the left hand side
3. Click **Add Package Size**
4. Enter Package Size by selecting package type, unit per package and unit size measure
5. Click **Save and Create Other** or **Save**

**Package Size Example:** Case (4 5 Pounds), Bag (1 15 Pound), Case (10 20 Each), etc.

### Package Type [\(RDS ELITE\)](#)

The package type table provides the user with the functionality to add custom package types that are assigned to an item as part of the package size.

1. Click **Administration**
2. Click **Package Type** in the navigation tabs on the left hand side
3. Click **Add Package Type**
4. Enter Package Type
5. Click **Save and Create Other** or **Save**

**Package Type Example:** Case, Box, Bottle, Container, etc.

### Personal Nutrient Profile [\(RDS ELITE\)](#)

The personal nutrient profile table provides the user with the functionality to manually enter nutrient information for specific food items. This table is generally used to enter nutrient information for unique food items that do not have a closely matching profile in the pre-loaded nutrient profile list. Once entered, the personal nutrient profile can be assigned to the item in the items detail section.

1. Click **Administration**

2. Click **Personal Nutrient Profile** in the navigation tabs on the left hand side
3. Click **Add Personal Nutrient Profile**
4. Enter Nutrient Profile name (Note: Nutrient Profile Name and Nutrient Per (amount and measure) are required fields)
5. Enter nutrient values
6. Click **Save and Create Other** or **Save**

## Portion Size

The portion size table provides the user with functionality to centrally manage (i.e. add, edit and delete) recipe portion size measurements (e.g. cup, each, ounces, slice). The portion size is assigned to recipes in the Recipe General Information section and is the combination of the amount and measurement (i.e. 2 cups, 1 each, 3 ounces).

1. Click **Administration**
2. Click **Portion Size** in the navigation tabs on the left hand side
3. Click **Add Portion Size**
4. Enter portion size name
5. Click **Save and Create Other** or **Save**

Portion Size Example: Cup, Each, Ounces, Slice, etc.

## Production Area

The production area table provides the user with functionality to build and maintain a list of specific areas of the kitchen where food items are handled, cooked and/or assembled. The production area is assigned to recipes in the Recipe General Information section.

1. Click **Administration**
2. Click **Production Area** in the navigation tabs on the left hand side
3. Click **Add Production Area**
4. Enter production area name
5. Click **Save and Create Other** or **Save**

Production Area Example: Salad Station, Grill, Beverages, Soups, Hot Food, Cold Food, etc.

## Recipe Type

The recipe type table provides the user with the functionality to build a list of recipe categories (e.g. Beverages, Breakfast Entrees, Starches, Vegetables, etc.). The recipe type categories may be as broad/general or specific as the user prefers. Recipes are grouped by recipe type on the Meal Selection Form impacting the appearance and presentation of multiple offerings. It is encouraged to consider how the facility wants to present and group selections prior to

determining the specificity of recipe types. Recipe type is assigned to the recipe in the Recipe General Information section.

1. Click **Administration**
2. Click **Recipe Type** in the navigation tabs on the left hand side
3. Click **Add Recipe Type**
4. Enter recipe type name
5. Click **Save and Create Other** or **Save**

**Recipe Type Example:** Beverages, Condiments, Entrees, Starches, Vegetables, Bread Basket, etc.

## Religion

The religion table provides the user with functionality to build a list of practiced religions and assign to residents in the Resident Details section.

1. Click **Administration**
2. Click **Religion** in the navigation tabs on the left hand side
3. Click **Add Religion**
4. Enter religion name
5. Click **Save and Create Other** or **Save**

**Religion Example:** Catholic, Jewish, Hindu, Baptist, Seventh Day Adventist, Muslim, etc.

## Room

The room table provides the user with the functionality to build a list of facility room numbers. The room numbers are assigned to an area name creating a room location. A resident's room location (area + room number + bed number [if applicable]) is assigned in the Resident Details section.

1. Click **Administration**
2. Click **Room** in the navigation tabs on the left hand side
3. Click **Add Room**
4. Select the corresponding area
5. Enter room number
6. Click **Save and Create Other** or **Save**

**Room Example:** 100, 100A, 101B, 20, 20-1, 20-2, etc.

## Room Route

The room route table provides the user with functionality to create a custom tray card/tray ticket delivery route, assign room numbers to the route and place the rooms in a specific sort order. Room route(s) are utilized as sorting and filtering options on the Tray Card Report and Tray Ticket Report. Selecting a room route as the 'sort by' option will print the tray cards or tray tickets in the order the rooms were placed within the route.

1. Click **Administration**
2. Click **Room Route** in the navigation tabs on the left hand side
3. Click **Add Room Route**
4. Enter room route name
5. Enter comments (optional)
6. Select included rooms (Tip: Holding down the Ctrl button on your keyboard allows you to select multiple rooms with the mouse)
7. Under room order, drag and drop the rooms in the desired order
8. Click **Save and Create Other** or **Save**

Room Route Example: Morning Tray Card Route, Weekend Tray Ticket Route, Floor 1 Route, etc.

## Seating Location

The seating location table provides the user with the functionality to build a list of table numbers and/or seat numbers in a defined dining area. The seating location is assigned by meal period and day of the week to residents in the Resident Dining Areas section. The seating location can contain either a table number and/or seat number if the facility manages assigned seating.

1. Click **Administration**
2. Click **Seating Location** in the navigation tabs on the left hand side
3. Click **Add Seating Location**
4. Enter seating location name
5. Select the corresponding dining area
6. Click **Save and Create Other** or **Save**

Seating Location Example: Table 1 Seat 1, Table 1 Seat 2, Table 2 Seat 6, etc.

## Serving Utensil

The serving utensil table provides the user with the functionality to build a list of serving utensils that are used by foodservice staff to serve and plate trays. Serving utensils are assigned to recipes in the Recipe General Information section and communicate to staff the appropriate serving utensil to utilize for the recipe's portion size.

1. Click **Administration**
2. Click **Serving Utensil** in the navigation tabs on the left hand side
3. Click **Add Serving Utensil**
4. Enter serving utensil name
5. Click **Save and Create Other** or **Save**

**Serving Utensil Example:** 6 oz Ladle, #8 Scoop, Lifter, Tongs, etc.

## System Messages

The system messages table is utilized to store system messages/notifications that are generated within the application to alert users of important information. Once system messages are read and dismissed by a user, the dismissed message can be accessed and reviewed in this table.

1. Click **Administration**
2. Click **System Messages** in the navigation tabs on the left hand side
3. Review system message content (sender, message and timestamp)

## Vendor ([RDS ELITE](#))

The vendor table provides the user with the functionality to add food vendors and supporting details/contact information into the application. Vendors are assigned to items allowing the user to associate items/products to the vendor(s) they are purchased from.

1. Click **Administration**
2. Click **Vendor** in the navigation tabs on the left hand side
3. Click **Add Vendor**
4. Enter vendor name and details
5. Click **Save and Create Other** or **Save**

**Vendor Example:** Sysco, Gordon Food Service, US Foods, Reinhart, etc.

## Printing Tables

Each administration table includes a print button that provides users with the functionality to print a list containing all entries within the specified table.

1. Click **Administration**
2. Click on desired table in the navigation tabs on the left hand side
3. Click **Print**

## Facility Settings

The facility settings section provides the user with the functionality to manage default software settings for patient identifiers, portion size display, image display, font color selection, meal selection forms and nourishment menus.

Users are able to centrally define the term used to refer to the occupants/admits within the facility by editing the preferred patient term (in singular format). The facility defined patient term updates every instance of the default term “residents” within the application. This functionality is particularly useful for facilities that refer to their occupants as anything other than residents (e.g. Patients, Clients, Tenants, etc.).

1. Click **Administration**
2. Click **Facility Settings** in the navigation tabs on the left hand side
3. Click the facility name in the table
4. Type in desired patient term (as a singular noun) in the Patient Term field
5. Click **Submit**

Users can customize the feeding assistance section header located within the resident record allowing the user to rename the section (e.g. Devices & Services) and utilize the functionality for assigning special services in addition to feeding devices to a resident.

The ‘Display Portion Sizes as Fractions’ checkbox provides the user with the functionality to select whether the recipe portion sizes display in fraction or decimal format throughout the application and on the reports.

The ‘Display Resident Images’ checkbox provides the user with the functionality to display or not display resident images within the resident details pages. If the option is selected, the resident details page will display an upload image option in the gray navigation panel allowing the user to select and upload an image of the resident. Uploaded images display on the tray card, tray ticket and meal selection forms reports.

The ‘Display Choice Groups’ checkbox provides the user with the functionality to display choice group functionality in the menu detail section and resident menu selections section. Choice group functionality allows users to assign recipes to different offering/choice groups making it easier for staff to offer choices to residents that include a set of recipes that should be served together (e.g. Choice Group 1 – Baked Chicken, Mashed Potato and Corn vs. Choice Group 2 – Roast Beef, Baked Potato and Green Beans).

**Warning:** Deselecting ‘Display Choice Groups’ after the functionality has been implemented and recipes have been assigned to choice groups in the menu detail section will permanently delete the choice groups. Recipes assigned to choice groups will be reassigned to the standard meal period display. Recipes that were assigned to more than one choice group will not be duplicated

in the standard meal period display. A warning and confirmation message will display upon deselecting the checkbox.

The 'Resident Menu Selections Based On' drop down provides the user with the functionality to determine the default setting for resident menu selections. When Date is selected for resident menu selections to be based upon, the selected and deselected recipes will only be saved for the corresponding calendar date. When Cycle Date is selected for resident menu selections to be based upon, the selected and deselected recipes will be saved to the corresponding cycle day.

Users may replace all instances of the word “tray” in the application with custom terminology in the Replace Tray Terminology with: field. (e.g. If “tray” was replaced with “dining”, tray cards and tray tickets would display as dining cards and dining tickets.)

Users can select the resident name format (first\_middle\_last or last\_first\_middle) and additional patient identifier (patient number or date of birth) to appear on tray cards, tray tickets and meal selection forms.

1. Click **Administration**
2. Click **Facility Settings** in the navigation tabs on the left hand side
3. Click the facility name in the table
4. Under Tray Card/Tray Ticket Options, select Report Name Format and Patient Identifier
5. Click **Submit**

Resident information on the tray card, tray ticket, and meal selection form can be displayed in the header or footer of the report. The resident information includes name, area/room number, dining area, seating location (optional) and patient identifier (optional). A user can specify which location by selecting header or footer from the drop down.

1. Click **Administration**
2. Click **Facility Settings** in the navigation tabs on the left hand side
3. Click the facility name in the table
4. Under Tray Card/Tray Ticket Options, select Display Resident Information As and select header or footer from the drop down.
5. Under Meal Selection Form Options, select Display Resident Information As and select header or footer from the drop down.
6. Click **Submit**

Font color selection and/or font emphasis (Bold, Italic, Underline) is available for assignment to specific fields on the tray cards/tray tickets and/or meal selection forms to highlight critical information on the reports.

1. Click **Administration**
2. Click **Facility Settings** in the navigation tabs on the left hand side

3. Click the facility name in the table
4. Under Tray Card/Tray Ticket Options and/or Meal Selection Form Options, select the font color assignment for the specific field(s) to highlight
5. Click on the color assignment drop down, and select the desired font color from saved colors or advanced tab (The advanced tab provides users with the functionality to select the color hue, lightness and saturation as well as preview the color selection)
6. Select the preview color by hovering the mouse over the preview and clicking **Select**
7. Select to check box next Bold, Italic, and/or Underline to assign a font emphasis
8. Click **Submit**

Users may choose to include like (L) and dislike (D) icons preceding the recipe name and portion size on Tray Tickets and/or Meal Selection Forms. The added (L) and (D) icons communicate to foodservice staff if a recipe on the tray ticket and/or meal selection form is a resident like or dislike allowing staff to be proactive and well informed when assembling resident trays.

1. Click **Administration**
2. Click **Facility Settings** in the navigation tabs on the left hand side
3. Click the facility name in the table
4. Under Tray Ticket Options and/or Meal Selection Form Options, check or uncheck to include (L) and (D) icons
5. Click **Submit**

Note: (L) and (D) icons generate on tray tickets and/or meal selection forms if a user has assigned recipes and/or entries from the likes/dislikes administration table as a resident like or dislike. Entries from the likes/dislikes administration table must also be assigned to the recipe as a preference. For more information, refer to Likes and Dislikes in the Resident section and Recipe Preferences in the Recipe section.

The recipes on the tray ticket report can be grouped by either production area or recipe type. This setting can be managed from the Tray Ticket Options section in the Facility Settings.

1. Click **Administration**
2. Click **Facility Settings** in the navigation tabs on the left hand side
3. Click the facility name in the table
4. Under Tray Ticket Options, select to group recipes by production area or recipe type
5. Click **Submit**

Users may choose to display or not to display portion sizes on the Meal Selection Form. This setting can be managed from the Facility Settings section.

1. Click **Administration**
2. Click **Facility Settings** in the navigation tabs on the left hand side
3. Click the facility name in the table
4. Under Meal Selection Form Options, check or uncheck to display portion size

5. Click **Submit**

Customized text may also be entered under Meal Selection Form Options to provide instruction that will generate on the top of the Meal Selection Form.

1. Click **Administration**
2. Click **Facility Settings** in the navigation tabs on the left hand side
3. Click the facility name in the table
4. Under Meal Selection Form Options, enter customized text in the Meal Selection Report Instruction field
5. Click **Submit**

Users are provided with the functionality to select/deselect the option to include the resident's menu type on the nourishment labels. In addition, users may define the number of weeks in their nourishment cycle as well as one-time identify the current nourishment week in production.

1. Click **Administration**
2. Click **Facility Settings** in the navigation tabs on the left hand side
3. Click the facility name in the table
4. Under Nourishment Options, enter the number weeks in the cycle as well as the current nourishment week
5. Check or uncheck to include menu type on labels
6. Click **Submit**

## Audit Log

The audit log provides users with the functionality to generate a log containing information related to user logins, user logouts and password changes. This information is important to facilities who want to track the individuals accessing the application as well as the date and time the events occurred. Event times display in the local machine's time zone. The audit log can be filtered by username, section, record name and/or date range.

1. Click **Administration**
2. Click **Audit Log** in the navigation tabs on the left hand side
3. Select **Username** filter (defaults to all)
4. Select **Section** filter (defaults to all)
5. Enter **Record Name** filter (defaults to all)
6. Select Date Range/**Time Between**
7. Click **Search**
8. Click **Export to CSV** (Optional – the returned audit log results can be exported to CSV file format, saved on the user's computer and reviewed within Microsoft Excel)

The returned audit log results can be sorted (A-Z) or reverse sorted (Z-A) by clicking on the table column headings. The number of audit log events/items listed per page can be customized by selecting the number of items per page to display in the lower right hand corner. The reset option reverts all applied filters back to the defaults.

## Price File Importer (RDS ELITE)

Within RDS Elite, a user has the ability to import a price file to streamline the process of updating cost information associated with vendor items.

### Files types and Vendors

We have designed the importer to read price files from

1. Gordon Food Service
2. US Foods
3. Reinhart Foodservice
4. Sysco/Sysco Market
5. Elite CSV Template

Set-up before a file import

The importer works by reading an Item's assigned Vendor and Product Code. If the two fields match, the importer will update the corresponding Package Cost. Before a user can import pricing information, Items need to have a vendor and product code listed.

Purchasing <span style="float: right;">Add New ↻</span>								
Vendor	Product Code	Brand	Package Size	Package Cost	Unit Cost	Comparison Cost	Primary?	Actions
☰ GFS	217699	(Unassigned)	BAG (15 Pound)	\$7.30	\$7.30	\$1.46 /pound	X	<a href="#">Edit</a> <a href="#">Price History</a>
☰ US Foods	007699	(Unassigned)	BAG (15 Pound)	\$7.71	\$7.71	\$1.54 /pound		<a href="#">Edit</a> <a href="#">Price History</a> <a href="#">Delete</a>
☰ Sysco	84029	(Unassigned)	BAG (15 Pound)	\$7.26	\$7.26	\$1.45 /pound		<a href="#">Edit</a> <a href="#">Price History</a> <a href="#">Delete</a>
☰ Reinhart	453633	(Unassigned)	BAG (15 Pound)	\$7.87	\$7.87	\$1.57 /pound		<a href="#">Edit</a> <a href="#">Price History</a> <a href="#">Delete</a>

To Import a File

1. Click **Administration**
2. Click **Import Price File**
3. Select Vendor
4. Choose File

5. Select **Inventory Group(s)** (Optional)
6. Click **Import**

## File Format: CSV Template

The CSV file template has a simple format and can be created in several programs including Microsoft Excel. No headers or column titles are needed.

Column One: Product Code

Column Two: Price per Package

Column Three: Vendor Name

Column Four: Item Description

2331304	32.31	VENDOR	APPLE, RED DELICIOUS 100 COUNT
6326326	34.47	VENDOR	APPLE, RED DELICIOUS 88 COUNT
5090469	21.44	VENDOR	BANANA, GREEN TIP FRESH REF
8168841	34.91	VENDOR	BLUEBERRY, FRESH REF
5282876	23.37	VENDOR	CANTALOUPE, 9-12 COUNT FRESH R
8903072	34.31	VENDOR	GRAPE, RED SEEDLESS FRESH REF
2952539	14.13	VENDOR	GRAPE, RED SEEDLESS WASHED & D

The price will only update a vendor item with a matching product code. The item description does not have to match. It will not be imported. The product code can contain both alpha and numeric characters. The price cell format should be a general, number, or text format. Do not use currency, accounting, or a custom format with a currency symbol.

Once an import is complete, a system message will appear.

- The Import was successful with the options to dismiss or view the Items Exceptions Report.  
OR
- Import failed. Please contact product support.

The Item Cost Update Exception Report is available for user to view which vendor items were not updated during the import. Items typically are not updated because the vendor has changed the item's product code or the item is no longer available. This report is available immediately following an import or from the Reports section. See Reports Section for more information on the Item Cost Exceptions Report.

Example of report:

by Shannon Marsa on Monday, January 08, 2018 01:33PM

### Item Cost Update Exceptions Report

Sorted by Item Name

Item Name	Vendor Name	Product Code	Active	Package Size	Current Pack Cost	Current Unit Cost	Last Cost Update
Beets,Canned,Red,Low Sodium,Incl Liquids	Sysco	1234567	Yes	Case (6 1 #10 Can)			
Vegetables,Mixed,Canned,Incl Liquids	Sysco	2858884	Yes	Case (6 1 #10 Can)			

In this example, a user imported a price file for Sysco and the two items were not included. The user will need to contact their vendor representative to determine what happened to the items.

When generated from the system message, the report will only display the exceptions from the most recent import. The report can also be generated from the Reports section with more options. Either way of accessing the report will only display the most recent exceptions from the specified vendor. If the user imports 2 price files for the same vendor, we are only saving the exceptions from the most recent import. Specific changes to an Item's pricing can be viewed in an Item's Pricing History.

#### Items Filter- View Item Exceptions

In addition to a report, there is also an Items filter available for a user to see exceptions from the most recent price file import. Under Items Filters, select 'Yes' or 'No' from the View Items Exceptions drop down.

# Residents

The resident section houses all resident specific information and provides the user with an easy to manage resident database with sorting and filtering options. Resident specific information surrounding a resident's personal details, menu selections, diet order, meal service specifications, likes/dislikes, meal preferences, nourishments and weight history can be maintained, edited, and retrieved from this section.

## In this chapter you will learn about ...

- Adding New Residents
- Editing Resident Record
- Sorting and Filtering
- Column Display Order
- Resident Navigation Buttons
- Resident Details
- Discharging a Resident/Assigning as Off-Site or Expired
- Resident Menu Selections
- Guest Tray
- Diet Orders
- Meal Service
- Dining Areas
- Likes/Dislikes
- Meal Preferences
- Weight History
- Nourishments
- Resident Reports Generated in Resident Record

## Adding New Residents

Residents are added into the software through the Residents section. Residents may be admitted into the software by adding new or by readmitting a resident from the archived resident list.

1. Click **Residents**
2. Click **Add New Resident**
3. Enter resident information (required fields are displayed with an asterisk)
4. Click **Save**

If the resident has been admitted and discharged from the facility in the past, the user will find the discharged resident located in the archived resident list. Once the resident is located within the archived resident list, the user may reassign the resident as on-site.

1. Click **Residents**
2. Click **Show Filters**
3. Click **Archived** in Resident State
4. Find resident in the archived list or search for resident with the search field
5. Click a resident to open
6. Click **Edit** on Resident Details
7. Click **Yes** for On-Site
8. Click **No** for Discharged

## Editing Resident Record

Resident details, notes, menu selections, diet order information, meal service items, dining areas, likes and dislikes, meal preferences, nourishments and weight can be edited and updated through the Residents section. The user may search for a resident by first or last name, sort by column category or filter the resident list to locate the desired resident.

## Sorting and Filtering

The Residents section provides users with the opportunity to sort and filter the resident list making it easy to view information in a logical and/or familiar order to the facility. Each column header can be sorted alphabetically/chronologically (A-Z) or reverse sorted (Z-A) allowing the user to sort by last name, first name, gender, room location, dining area/seating location, allergies, diet order and menu type. The defined sort order remains in place until the list is sorted differently by the user. The Residents section also contains multiple filter options, allowing the user to filter by the following selections: Diet Order, Menu Type, Area, Room, Religion, Allergies, Resident State, Dining Area, and House Menu.

## Column Display Order

The Residents section contains the resident list and displays columns of pertinent resident information. Users can customize the order that the columns are displayed on the page by dragging and dropping the columns into a desired order.

To Change the Column Display Order:

1. Click **Residents**
2. Click **Show Column Display Order**
3. Click, drag and drop the column name boxes into the desired order
4. Click **Hide Column Display Order** to collapse the column name boxes

## Resident Navigation Buttons

The left hand navigation within the resident record contains previous resident, next resident, and back to search results buttons providing the functionality to progress through the resident list in the order the list was filtered and/or sorted. The resident navigation buttons provide an easy approach to move from one resident record to another without having to return the resident list. The back to search results button directs the user back to the filtered and/or sorted resident list.

## Resident Image

The resident image is located in the gray navigation panel within the resident record directly below the resident's name and above the resident navigation buttons. If "Display Resident Images" is selected in Facility Settings, the resident details page will include an upload image option allowing the user to select and upload an image of the resident. If an image has not been uploaded, the image placeholder will display stating "No photo to display". Uploaded images will display on the tray card, tray ticket and meal selection form reports.

To Upload an Image:

1. Click **Residents**
2. Click a resident to open
3. Mouse over the image placeholder and click **Upload**
4. Browse/search personal folders to locate desired image
5. Click **Open** (Note: Maximum image size is 5 MB.)

To Edit/Delete an Image:

1. Click Residents
2. Click a resident to open
3. Mouse over the existing resident image and click **Change** or **Delete**
4. If *changing* image, browse/search personal folders to located desired image and click **Open**
5. If *deleting* image, click **Yes** to "This will remove the photo. Are you sure?"

## Resident Details

The Resident Details section includes basic information about the resident including Patient Number, First Name, Middle Initial or Name, Last Name, Gender, Date of Birth (DOB), Height (in), Weight (lbs), Acuity Level, Language, Room Location, Religion, Admit Date, Discharge Date, and resident status (on-site/discharged/expired).

The admit date is auto-populated when the user clicks save on the 'add new resident' page creating a new resident record. The admit date can be edited and/or deleted by the user. The

discharge date is auto-populated when the user toggles the resident's discharged status to 'yes' and clicks save. The discharged date can also be edited and/or deleted by the user.

Residents can be toggled (yes/no) to be included in the tray ticket report and meal selection forms. If the resident is toggled 'no' to either of these options, the resident will not be included in the corresponding report. As an example, a resident on a pureed menu type may never be offered multiple selections. By toggling 'include in meal selections' to 'no', it prevents the application from generating/printing a meal selection form for the resident.

Residents can be automatically assigned to a nourishment template from the Resident Detail section. Refer to the Nourishments section in the Residents chapter for more information.

## Discharging a Resident/Assigning as Expired

Residents can be discharged or assigned as expired from the resident detail section.

To Discharge a Resident:

1. Click **Residents**
2. Click a resident to open
3. Click **Edit** on Resident Details
4. Click **Yes** for Discharged
5. Click **Save**

To Assign a Resident as Expired:

1. Click **Residents**
2. Click a resident to open
3. Click **Edit** on Resident Details
4. Click **Yes** for Expired
5. Click **Save**

When a resident is set to 'Yes' for discharged or expired, the resident's room location will be released for assignment to another resident. In addition, discharged or expired residents will automatically move to the archived resident list and will no longer be listed as active residents.

## Resident Menu Selections

The Resident Menu Selection section is utilized by facilities that have built and entered menus into the Menus section of the software. The Resident Menu Selection section is generated with offerings that have been added to the menu type currently assigned to the resident.

The user may select or deselect resident choices. Selected offerings print directly on the resident's tray ticket. If a resident requests an item not currently being offered on the main menu and is not an available selection within the Menu Selections section, the user may search for additional offerings by clicking the 'Add Other' button. The 'Add Other' option allows the user

to select and add an item to the resident's menu selections from the alternate menu, production menu or all recipes listed within the application. The recipes can be assigned to the current date, specific cycle dates, or all cycle days. To remove recipes added through the 'Add Other' button, click on the X located next to recipe name and select Remove, From the Cycle Day, or From all Cycle Days. The remove functionality only applies to recipes added to a resident's menu selections section. Main menu changes are still to performed in the Menus section.

The 'Base menu selections on' drop down provides a user the ability to determine if the selections being made should be applied only to the specific calendar date or be saved to the cycle date. The facility can set the default for all residents in the Administration section under facility settings. Example: A resident has the option between chicken and fish on day 1 of their menu. The resident had previously informed the user they do not like fish and wish to only be served chicken for that specific meal. By using the 'Base menu selection on' feature, chicken only has to be selected once and the recipe will be saved anytime day 1 repeats.

**Warning:** Changes to a resident's menu selections when based on cycle day are only valid during the assigned menu's production dates at the time of the change. If the menu's production dates are altered (i.e. production end date lengthened or shortened) the resident's menu selections will only be applicable to the original production dates.

Example: A resident has Coffee added to their menu every day at breakfast. The assigned menu has production dates of January 1<sup>st</sup> through June 30<sup>th</sup>. The user alters the production dates in the menu section by extending the menu end date to July 31<sup>st</sup>. Coffee will only appear on the resident menu until June 30<sup>th</sup>. To include coffee for the additional month, the user will need to add coffee to all cycle days in the resident menu selection section to a day after July 1<sup>st</sup>.

## Choice Groups

If 'Display Choice Groups' is selected in the Facility Settings section and recipes have been added to choice groups on the menu detail page, the added choice groups will also display in the Resident Menu Selections section allowing the user to select a choice group and view all of the recipes assigned to the group. The functionality makes it easier for staff to present/offer a set of recipes that should be served together to residents and easily switch between choice group offerings prior to making resident selections.

The choice group selections serve as a guide to staff to assist in offering the correct choices. By clicking on a choice group, the recipes assigned to that choice group will become outlined. This allows staff to offer the recipes together as a grouping. Clicking on another choice group will outline the recipes assigned to that group. The user may then select the resident's choices by clicking on the requested recipe(s).

The screenshot shows a breakfast menu interface. At the top, there are dropdown menus for 'Breakfast' and 'Default (In Room)', along with 'Add Other' and 'View Tray Ticket' buttons. Below these are two buttons for 'Choice Group 1' and 'Choice Group 2'. The menu is organized into several categories, each with a list of items and a selection box:

- Butter/Margarine:** Margarine (selected), Margarine & Syrup
- Hot Beverages:** Coffee (selected)
- Eggs:** Egg, Scrambled; Egg, Fried (selected)
- Bacon:** Bacon (selected)
- French Toast/Pancake/Waffle:** Pancakes
- Starch:** Potatoes, Hashbrown Patty (selected)
- Toast:** Toast (selected)
- Juice:** Orange Juice

## Guest Tray

The Guest Tray section provides users with the functionality to obtain guest menu selections and print a corresponding tray ticket for the resident's guest. The Guest Tray section displays all menu items that are on all available production menu(s) for the current day. Once guest selections are made, the user may click 'View Tray Ticket' in the Menu Selections section to view the tray tickets for both the resident and the resident's guest.

## Diet Orders

### Diet Orders

Diet orders are assigned to each resident in the Resident Diet Orders section of the software. Multiple diet order restrictions can be assigned to a resident allowing the user to create combination diets to address the needs of their residents. The diet order will appear on reports in the order the restrictions are placed in this section. Users may drag and drop the restrictions into a desired order. The most critical restriction, or the restriction to be listed first in the name string, should be placed as the first restriction. The diet order will read as a combination of the assigned restrictions (e.g. Pureed, NCS). There is no limit to the number of diet order restrictions that can be assigned to a resident.

### Fluid Consistency

The fluid consistency is assigned to the resident in the Resident Diet Orders section of the software. The fluid consistency prints in the DIET section of the tray card, tray ticket and meal

selection form reports. The fluid consistency will display as the final restriction of the diet order on all other reports and in the resident list.

## Menu Type

The menu type is assigned to the resident in the Resident Diet Orders section of the software. The menu type typically refers to the base menu template that foodservice staff or tray line should follow in order to serve the correct menu items to the resident. The menu type, in some circumstances, may be identical to the resident's diet order. In other circumstances, foodservice staff and tray line may need to further individualize the menu based on the resident's needs.

When there is a change to a resident's menu type, the selected recipes from the previous menu will no longer be saved. We recommend to always review menu selections when there has been any change to a resident's diet order and/or menu type.

## Nourishment Menu Type

The nourishment menu type is assigned to the resident in the Resident Diet Orders section of the software. The separation of the menu type and nourishment menu type provides the user with functionality to assign a resident to different menu types for the main menu and nourishment menu. The nourishment menu that populates the resident's nourishment info section when "automatically assign to nourishment template" is toggled to yes in the resident detail section is based upon the resident's assigned nourishment menu type.

## Assign to House Menu?

Users may assign residents to the house menu in the Resident Diet Orders section of the software. Assigning resident(s) to the house menu typically means that the resident does not receive a choice of menu offerings, and is served what is considered to be the main/house offering. Select menu facilities may have residents assigned to the house menu if they are unable to make their own selections. In a non-select menu facility, all residents will be assigned to the house menu as residents are not provided with multiple offerings. By toggling 'Assign to house menu' to 'yes', the application will auto-select the items that are considered main/house items for the resident.

When changing the Assign to House Menu toggle between yes and no, the resident's menu selections will reset and follow the defaulted status according to the menu. All previously selected or deselected recipes will no longer be saved.

## Allergies

Allergies are assigned to residents in the Resident Diet Orders section of the software. If a resident has known or documented allergies, the user should assign the allergies to the resident. Listed allergies will print on both the resident's tray card and tray ticket.

## Portions

Users may identify the standard portion size associated with each meal period by defining small, regular or large portions. The portion size will only print on the tray cards, tray tickets, and meal selection forms if small or large portions is selected for the corresponding meal period. The portion size will not print on the reports if the resident is to receive regular portions.

### Requires Calorie Count?

The calorie count section is a yes/no option allowing the user to indicate/flag the resident's status. Users may print a Calorie Count Report providing a list of all residents assigned to a calorie count.

## Meal Service

### Feeding Assistance Devices

Feeding assistance devices are assigned to residents in the Resident Meal Service section of the software. Feeding assistance devices are assigned by meal period allowing the user to identify unique devices specific to each meal period. Multiple devices may be added per meal period. Devices can be dragged and dropped into a desired order. Feeding devices will print on tray cards, tray tickets, meal selection forms and the feeding device report in the order the user designated.

### Tube Feeding

Tube feedings may be initiated within the Resident Meal Service section of the software. Tube feeding type, rate and special instructions are indicated within this section.

## Meal Schedule

The meal schedule located within the Residents section provides users with the functionality to mark a resident as off-site and/or not eating for a specified date range or for a recurring off-site pattern. The user is able to define a start date/meal period and return to site date/meal period as well as create a unique recurring off-site schedule to accommodate residents that go off-site for recurring appointments (e.g. dialysis).

To Assign a Resident as Off-Site and/or Not Eating:

1. Click **Residents**
2. Click a resident to open
3. Click **Meal Schedule** in the navigation tabs on the left hand side
4. Click **Yes** to 'This Resident is scheduled to be off-site and/or not eating'
5. Select **Start Date** and **Start Meal Period** (optional)
6. Select **End Date** and **End Meal Period** (optional)
7. Click **Save**

If a start date is not designated, the resident will be considered off-site and/or not eating immediately. If an end date is not designated, the resident will be considered off-site and/or not eating indefinitely until the user specifies an end date or changes the off-site/not eating toggle to 'no'. If a start date and meal period are selected, the resident will be considered on-site until the specified start date/start meal period. For example, if the user selects dinner as the start meal period, the resident will be considered on-site for that day for all meal periods prior to dinner and will be included in reports for those meal periods. Once the end date/end meal period is reached, the resident will be included back in the reports.

To Assign a Resident as Off-Site and/or Not Eating for a Recurring Pattern:

1. Click **Residents**
2. Click a resident to open
3. Click **Meal Schedule** in the navigation tabs on the left hand side
4. Click **Yes** to 'This Resident is scheduled to be off-site and/or not eating'
5. Select **Start Date** and **Start Meal Period** (optional)
6. Select **End Date** and **End Meal Period** (optional)
7. Click **Yes** to Recurrence Pattern
8. Assign resident off-site and/or not eating to recurring day(s) and meal period(s) (Tip: Selecting the checkbox to the left of the meal period will automatically select all days of the week for the corresponding meal period)
9. Click **Save**

Residents marked as off-site and/or not eating will not generate on reports such as tray cards, tray tickets, meal selection forms, production guide, nourishment labels, nourishment cart and meal preference tally for the corresponding off-site date range/meal periods or recurring pattern.

## Dining Areas

### Default Dining Areas

Default dining areas and seating locations are specified by meal period allowing staff to indicate the resident's default dining and seating location for each individual main meal period. If the facility does not have assigned seating, the user may leave the seating location (table number and/or seat number) blank or unaltered. The Default Dining Areas section allows the user to specify a main dining area and/or seating location that the resident dines in the majority of the days of the week. If the resident dines in the same location all days of the week, no further information needs to be defined. If the resident dines in a different location by day of the week and by meal period, the user will need to select the resident's specific dining areas. See the next section, Specific Dining Areas.

1. Click **Residents**
2. Click a resident to open

3. Click **Dining Areas** in the navigation tabs on the left hand side
4. Select the Default Dining Areas and Seating Locations from the drop downs for main meal periods

## Specific Dining Areas

Specific dining areas and seating locations provide users with the functionality to assign day of the week and meal period specific dining areas and seating locations should they differ from the default selections.

1. Clicks **Residents**
2. Click a resident to open
3. Click **Dining Areas** in the navigation tabs on the left hand side
4. If not already set, select Default Dining Areas and Seating Locations from the drop downs in the Default Dining Areas section
5. Click to expand the desired day of the week in the Specific Dining Areas section and override the default setting by selecting another option in the drop downs

## Likes and Dislikes

### Likes

Likes are assigned to residents in the Resident Likes and Dislikes section of the software. Generic food items or food categories are built into the Likes/Dislikes administration table providing the user with a list of items to assign to each resident. In addition to generic food items, users may also assign recipes as 'likes'. Users can easily distinguish between generic food items built into the Likes/Dislikes administration table and recipes by the **recipe** label that is displayed to the right of the item in the returned search results. Resident 'likes' are assigned by meal period allowing the user to identify a resident's likes specific to each main meal period. Multiple 'likes' may be added per meal period. Resident 'likes' appear on tray cards.

### Dislikes

Dislikes are assigned to residents in the Resident Likes and Dislikes section of the software. Generic food items or food categories are built into the Likes/Dislikes administration table providing the user with a list of items to assign to each resident. In addition to generic food items, users may also assign recipes as 'dislikes'. Resident 'dislikes' are assigned by meal period allowing the user to identify a resident's dislikes specific to each main meal period. Multiple 'dislikes' may be added per meal period. Resident 'dislikes' appear on tray cards.

1. Click **Residents**
2. Click a resident to open
3. Click **Likes and Dislikes** in the navigation tabs on the left hand side
4. Click **Add New**

5. Begin typing desired like or dislike (The returned results pull from the Likes/Dislikes administration table and recipe list. If the desired item is not returned in the results, add the item to the Likes/Dislikes administration table or as a new recipe.)
6. Select meal period(s)
7. Click **Add**

## Meal Preferences

### Add Meal Preference

Meal Preferences allow the user to assign recipes (e.g. breakfast preferences, beverage preferences) to specific meal periods and days of the week. Assigned meal preferences print on tray cards and tray tickets.

1. Click **Residents**
2. Click a resident to open
3. Click **Meal Preferences** in the navigation tabs on the left hand side
4. Click on the search field under **Add Meal Preference**
5. Search for and select desired recipe that is to be added as resident meal preference
6. Assign meal preference to day(s) and meal period(s) (Tip: Selecting the checkbox to the left of the meal period will automatically select all days of the week for the corresponding meal period)
7. Click **Save**

### Edit Frequency of Meal Preference

1. Click Residents
2. Click a resident to open
3. Click **Meal Preferences** in the navigation tabs on the left hand side
4. Click on any instance of the meal preference to be edited
5. Edit the assigned meal period(s) and day(s) of the week
6. Click **Save**

### Delete All Instances of Meal Preference

1. Click Residents
2. Click a resident to open
3. Click **Meal Preferences** in the navigation tabs on the left hand side
4. Click on any instance of the meal preference to be deleted
5. Click **Remove Recipe**
6. Click **Yes** to 'Are you sure you want to remove the recipe from all days?'

## Weight History

The weight history located within the Residents section allows the user to enter resident weight(s) (pounds/lbs) and the date (MM/DD/YYYY) the weight was taken. The weight history is easy to view and manage providing a tracking system of past collected resident weights. The weight change indicator reflects the +/- weight change (displayed in lbs. and %) from the two most recent recorded weights.

1. Click **Residents**
2. Search for resident
3. Click to open resident
4. Click **Weight History** in the navigation tabs on the left hand side
5. Click **Add or Update +**
6. Enter weight (lbs) and date taken (MM/DD/YYYY)
7. Click **Add**

Only one weight may be added per date for a resident. Adding a second weight for the same date will result in the update of the first recorded/entered weight.

## Nourishments

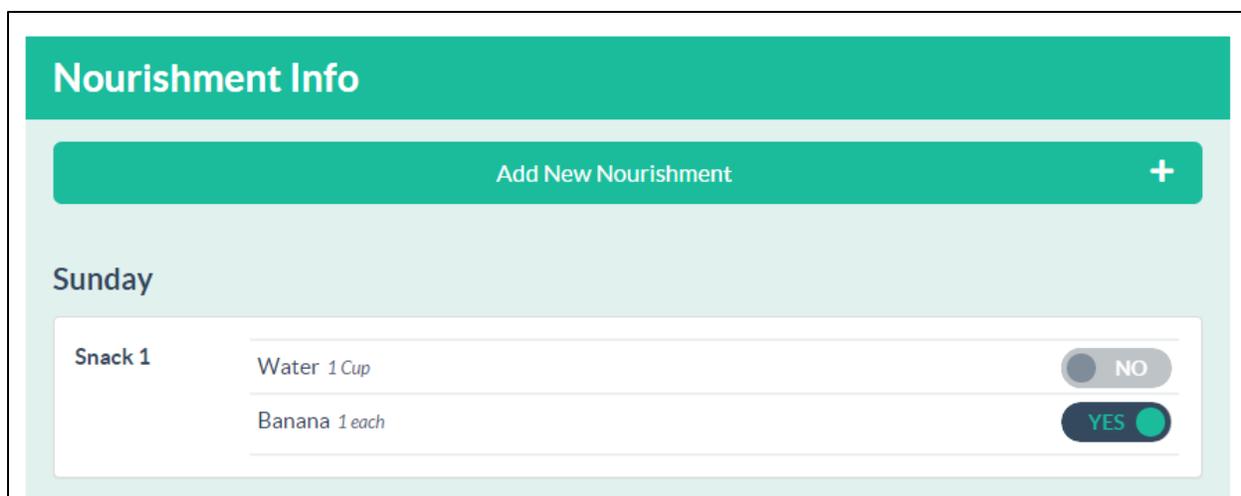
### Nourishment Info

Resident specific nourishment information is found within the resident's record. The Nourishment Info section encompasses information from the assigned nourishment menu template as well as resident write-ins. Once nourishment menus are planned and created within the Nourishments section of the software, users have the ability to attach residents to a nourishment menu based on their assigned nourishment menu type. A resident can be assigned to a nourishment menu within the Resident Details section of the resident record. Once the resident is assigned to the nourishment template, the resident's Nourishment Info section will be populated with nourishments from the assigned nourishment menu template.

To Assign a Resident to a Nourishment Template:

1. Click **Residents**
2. Search for resident
3. Click to open resident
4. Click **Edit** on the Resident Details section
5. Click **Yes** to Automatically Assign to Nourishment Template?

Users may toggle nourishments from the nourishment template to yes or no in the resident nourishment info section. If the nourishment is toggled 'yes', the resident is assigned to receive the nourishment and a corresponding nourishment label will generate. If the nourishment is toggled to 'no', the resident will not receive the nourishment and a label will not generate.



Nourishment write-ins can be added to the resident nourishment info section by using the Add New Nourishment functionality. Write-ins allow the user to create resident specific nourishment menus or add additional nourishments to an already existing nourishment menu template.

To Add a Nourishment Write-In:

1. Click **Residents**
2. Search for resident
3. Click to open resident
4. Click **Nourishments** in the navigation tabs on the left hand side
5. Click on the search field under **Add New Nourishment**
6. Search for and select desired recipe that is to be added as resident nourishment
7. Assign nourishment to day(s) and meal period(s) (Tip: Selecting the checkbox to the left of the meal period will automatically select all days of the week for the corresponding meal period)
8. Click **Save**

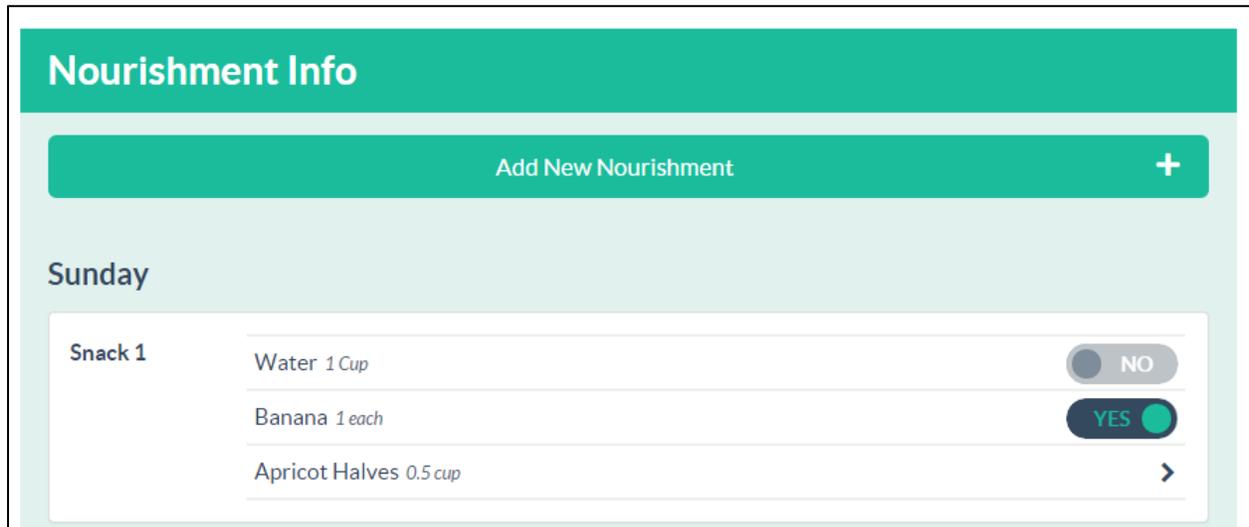
To Edit a Write-In Nourishment's Schedule:

1. Click **Residents**
2. Search for resident
3. Click to open resident
4. Click **Nourishments** in the navigation tabs on the left hand side
5. Click on any instance of the nourishment to be edited
6. Edit the assigned meal period(s) and day(s) of the week
7. Click **Save**

To Delete All Instances of a Nourishment Write-In:

1. Click **Residents**
2. Search for resident

3. Click to open resident
4. Click **Nourishments** in the navigation tabs on the left hand side
5. Click on any instance of the nourishment to be deleted
6. Click **Remove Recipe**
7. Click **Yes** to 'Are you sure you want to remove the recipe from all days?'



Write-in nourishments can be distinguished from template nourishments by the yes/no toggle or arrow >. Write-in nourishments can be edited or deleted by clicking the arrow >. Template nourishments cannot be deleted, but can be toggled to be activated/deactivated (yes/no).

## Resident Reports Generated in Resident Record

The following reports can be generated directly from the resident's record: Resident Detail Report, Today's Tray Cards, Meal Selection Forms, Resident Dining Area Report, Resident Weight History Report and Tray Tickets. All reports accessible from the resident's record can be generated from the left hand side navigation tab. Reports generated from within the resident record cannot be customized.

# Items (RDS ELITE)

The Items section provides users with the functionality to create new food items, edit existing food items, create ingredients and assign nutrient profiles. Items are food products purchased from vendors and used as ingredients in the building of recipes. The Items section is available in the RDS Elite application.

In this chapter you will learn about ...

- Adding New Items
- Editing Items
- Purchasing
- Ingredients
- Nutrient Profiles
- Global Primary Vendor
- Deactivating Items
- Sorting and Filtering
- Column Display Order

## Adding New Items

1. Click **Items**
2. Click **Add New Item**
3. Enter item name
4. Select inventory group
5. Enter thaw time (in days)
6. Select vendor
7. Enter product code
8. Select brand
9. Select package size
10. Enter package cost or unit cost
11. Toggle yes/no for catchweight item (costed by the unit)
12. Enter as purchased (AP) to edible portion (EP) ratio (%)
13. Enter volume to weight
14. Enter unit weight
15. Click **Save** or **Save and Create Other**

## Editing Items

An item's name, status, inventory group, thaw time, purchasing options, ingredients and assigned nutrient profiles can be edited and updated through the Items section. The user may search for an item by name in the search field, sort by column category or filter the item list to locate the desired item. An item can be deleted only if it is not being referenced by the application. In other words, to delete an item from the application, the item cannot be used as an ingredient in recipes.

## Purchasing

To Add a New Purchasing Option:

1. Click **Items**
2. Search for item by name in search field
3. Click on item to open
4. Click on **Purchasing** in the navigation tabs on the left hand side
5. Click **Add New**
6. Select vendor
7. Enter product code
8. Select brand
9. Select package size
10. Enter package cost or unit cost
11. Toggle yes/no for Catchweight Item
12. Toggle yes/no for Primary
13. Click **Save**

To Edit a Purchasing Option:

1. Click **Items**
2. Search for item by name in search field
3. Click on item to open
4. Click on **Purchasing** in the navigation tabs on the left hand side
5. Click **Edit** for the desired vendor item
6. Edit vendor item details
7. Click **Save**

To Update Pricing/View Price History:

1. Click **Items**
2. Search for item by name in search field
3. Click on item to open
4. Click on **Purchasing** in the navigation tabs on the left hand side
5. Click on **Price History** for the desired vendor item

6. Click **Add New Pricing**
7. Enter Start Date
8. Enter Pack Cost or Unit Cost
9. Click **Save**

To Delete a Purchasing Option:

1. Click **Items**
2. Search for item by name in search field
3. Click on item to open
4. Click on **Purchasing** in the navigation tabs on the left hand side
5. Click **Delete** for desired vendor item (Note: Vendor items marked as primary cannot be deleted. You will need to mark another vendor item/purchasing option as primary before deleting.)

## Ingredients

To Add an Ingredient:

1. Click **Items**
2. Search for item by name in search field
3. Click on item to open
4. Click on **Ingredients** in the navigation tabs on the left hand side
5. Click **Add New**
6. Enter ingredient name
7. Enter AP/EP %
8. Enter volume (amount and measure) to weight (amount and measure) conversion (Note: Use the nutrient link search field to search by keyword for weight to volume conversions)
9. If applicable, enter unit weight (amount and measure)
10. Click **Save**

## Nutrient Profiles

To Assign a Nutrient Profile to a Vendor Item:

1. Click **Items**
2. Search for item by name in search field
3. Click on item to open
4. Click on **Nutrient Profile** in the navigation tabs on the left hand side
5. Click **Add New**
6. Search by keyword
7. Select desired nutrient profile
8. Select specific vendor item(s) or select All Vendors
9. Click **Assign Profile**

## Global Primary Vendor

The vendor item in the purchasing selection marked primary will be used as the primary reference used in costing and purchasing reports. The +Primary Vendor button streamlines the process of setting a specific vendor primary. If multiple items are listed for the same vendor, the one listed first will be marked primary when using the Global Primary Vendor feature.

To assign multiple items from one vendor primary:

1. Click **Items**
2. Click **+Primary Vendor**
3. Select a Vendor from the drop down.
4. Select applicable inventory groups (optional)
5. Click **Add**

## Deactivating Items

Items can be deactivated and removed from the active item list.

1. Click **Items**
2. Search for item by name in search field
3. Click on item to open
4. Click **Edit**
5. Change Status to Inactive
6. Click **Save**

Items assigned as inactive will automatically move to the inactive item list and will no longer be listed as an active item. To reinstate an item, change the status to active.

1. Click **Items**
2. Click **Show Filters**
3. Click **Inactive** in Status
4. Find item in the inactive list or search for item with the search field
5. Click an item to open
6. Click **Edit** on item
7. Change status to **active**
8. Click **Save**

## Sorting and Filtering

The Items section provides users with the opportunity to sort and filter the item list narrowing return results and making it easier to view information. Each column header can be sorted alphabetically/chronologically (A-Z) or reverse sorted (Z-A) allowing the user to sort by item name, primary vendor, primary product code, primary package size, primary package cost and

inventory group. The Items section also contains multiple filter options, allowing the user to filter by the following selections: Status, Vendor, Package Size, Inventory Group, Items Exceptions, and Brand.

## Column Display Order

The Items section contains the item list and displays columns of pertinent item information. Users can customize the order that the columns are displayed on the page by dragging and dropping the columns into a desired order.

To Change the Column Display Order:

5. Click **Items**
6. Click **Show Column Display Order**
7. Click, drag and drop the column name boxes into the desired order
8. Click **Hide Column Display Order** to collapse the column name boxes

# Recipes

The Recipes section provides users with the functionality to create new recipes, edit existing recipes, mark recipes as nourishments and identify allergens and preferences. Recipes are the basis for the building of meals and menus.

In this chapter you will learn about ...

- Adding New Recipes
- Editing Recipes
- Copying Recipes
- Sorting and Filtering
- Archiving Recipes
- General Information
- Ingredients/Instructions
- Costing
- Nutrients
- Recipe Allergens
- Recipe Preferences
- Recipe Reports Generated in Recipe Record

## Adding New Recipes

1. Click **Recipes**
2. Click **Add New Recipe**
3. Enter recipe name
4. Select recipe type
5. Select production area
6. Select serving utensil
7. Enter portion size number and select portion size measure (i.e. 1.5 cup or 1 ½ cup or 1-1/2 cup)
8. Enter recipe yield
9. Toggle for Nourishment
10. Click **Save**

## Editing Recipes

A recipe's name, state, type, production area, serving utensil, portion size, yield, nourishment status, fluid consistency flag, allergens and likes/dislikes can be edited and updated through the Recipes section. The user may search for a recipe by name in the search field, sort by column category or filter the recipe list to locate the desired recipe. A recipe can be deleted only if it is not being referenced by the application. In other words, in order to delete a recipe from the application, the recipe cannot be assigned to menus, nourishments, meal preferences, production overrides and/or conflict resolutions.

## Copying Recipes

The copy function provides users with functionality to copy a recipe and its assigned recipe type, production area, portion size, recipe yield, nourishment status, allergens and preferences making it easier to create modified versions of the main recipe.

1. Click **Recipes**
2. Under actions, click **Copy** on the desired recipe
3. Re-name/edit recipe name (by default, recipe name will appear as xx\_copy)
4. If different, edit recipe type, production area, portion size, recipe yield and/or nourishment status
5. Click **Save**

## Sorting and Filtering

The Recipes section provides users with the opportunity to sort and filter the recipe list narrowing return results and making it easier to view information. Each column header can be sorted alphabetically/chronologically (A-Z) or reverse sorted (Z-A) allowing the user to sort by recipe name, portion size, recipe type, allergens, preferences and production area. The Recipes section also contains multiple filter options, allowing the user to filter by the following selections: Recipe State, Recipe Type, Allergens, Meal Preferences and Production Area.

## Archiving Recipes

Recipes can be archived and removed from the active recipe list.

7. Click **Recipes**
8. Search for recipe by name in search field
9. Click on recipe to open
10. Click **Edit**
11. Change Recipe State to Inactive
12. Click **Save**

Recipes assigned as inactive will automatically move to the archived recipe list and will no longer be listed as an active recipe. To reinstate a recipe, change the recipe state to active.

9. Click **Recipes**
10. Click **Show Filters**
11. Click **Inactive** in Recipe State
12. Find recipe in the inactive list or search for recipe with the search field
13. Click a recipe to open
14. Click **Edit** on recipe
15. Change recipe state to **active**
16. Click **Save**

## General Information

The Recipe General Information section includes basic information about the recipe including the recipe name, recipe state, recipe type, production area, serving utensil, portion size, recipe yield, nourishment status, and fluid consistency flag.

The serving utensil communicates to foodservice staff on the tray ticket report the proper serving utensil to utilize to serve the correct portion of the recipe.

The fluid consistency toggle provides users with the functionality to flag a recipe as a fluid/liquid that may be altered (e.g. thickened) for residents with an assigned fluid consistency. Recipes with the fluid consistency toggle set to 'yes' will print on the resident's tray card and tray ticket with the resident's assigned fluid consistency preceding the recipe name (e.g. Honey Thick Apple Juice).

## Ingredients/Instructions [\(RDS ELITE\)](#)

The recipe ingredients/instructions section includes the ingredients, amounts and steps/instructions for preparation of the recipe. It also includes Hazard Analysis Critical Control Point (HACCP) information allowing the user to assign critical control points (CCPs) at the step level.

### Editing Ingredients/Instructions

To Add an Ingredient to a Recipe:

1. Click **Recipes**
2. Search for recipe by name in search field
3. Click on recipe to open
4. Click on **Ingredients/Instructions** in the navigation tabs on the left hand side
5. Click **Edit**
6. Click **Add Ingredient** or **Add Recipe** (Note: 'Add Recipe' is utilized when wanting to add a recipe as an ingredient to the current recipe [recipe within recipe])

7. Select ingredient
8. Enter amount, measure, AP or EP and scaling factor
9. Click **Add**
10. Click **Save**

Ingredients are displayed in the order they are added. Users can drag/drop ingredients within a step into a desired order. Left click and hold on the ingredient. Drag the ingredient into the desired position before releasing the left mouse button.

To Add Instructions:

1. Click **Recipes**
2. Search for recipe by name in search field
3. Click on recipe to open
4. Click on **Ingredients/Instructions** in the navigation tabs on the left hand side
5. Click **Edit**
6. Click on the desired step
7. Enter instructions into the free text field
8. Click **Save**

To Add HACCP Instructions:

1. Click **Recipes**
2. Search for recipe by name in search field
3. Click on recipe to open
4. Click on **Ingredients/Instructions** in the navigation tabs on the left hand side
5. Click **Edit**
6. Click on the desired step
7. Click **Add HACCP Instruction**
8. Select HACCP Category
9. Select CCP Instruction(s)
10. Click **Add**
11. Click **Save**

HACCP instructions are displayed in the order they are added. Users can drag/drop HACCP instructions within a step into a desired order. Left click and hold on the HACCP instruction. Drag the HACCP instruction into the desired position before releasing the left mouse button.

To Add a Step to a Recipe:

1. Click **Recipes**
2. Search for recipe by name in search field
3. Click on recipe to open
4. Click on **Ingredients/Instructions** in the navigation tabs on the left hand side
5. Click **Edit**

6. Click **Add a Step** (The step will be added on the left)
7. Click **Save**

Steps are displayed in the order they are added. Users can drag/drop steps into a desired order. Left click and hold on the step. Drag the step into the desired position before releasing the left mouse button.

To Delete a Step/HACCP Instruction/Ingredient:

1. Click **Recipes**
2. Search for recipe by name in search field
3. Click on recipe to open
4. Click on **Ingredients/Instructions** in the navigation tabs on the left hand side
5. Click **Edit**
6. Click **X** next to the step/HACCP Instruction/Ingredient you wish to delete
7. Click **Save**

### Scale Recipe

The scale recipe button enables a user to scale/quantify the recipe to a different yield/number of portions and view the updated ingredient amounts required to prepare the recipe on the page. The functionality is a temporary override and does not permanently alter the ingredient amounts entered for the standard recipe. The scale recipe button is typically used to view a scaled recipe and updated ingredient amounts on screen. Scaled recipes can be printed by generating the Recipe Report and entering corresponding yields.

To Scale a Recipe on the Page:

1. Click **Recipes**
2. Search for recipe by name in search field
3. Click on recipe to open
4. Click on **Ingredients/Instructions** in the navigation tabs on the left hand side
5. Click **Scale Recipe**
6. Enter a new value in the Number of Portions field
7. View the recipe ingredients, updated amounts and instructions for preparation on the page
8. Click **Close** to revert the recipe back to the standard yield amounts

### Costing (RDS ELITE)

The recipe costing section displays a detailed breakdown of the standard recipe's ingredients, amounts (as purchased), cost per portion, cost per recipe and percentage. It also displays the total cost per recipe and total cost per portion.

To Access and View Recipe Costing:

1. Click **Recipes**
2. Search for recipe by name in search field
3. Click on recipe to open
4. Click on **Costing** in the navigation tabs on the left hand side

## Nutrients [\(RDS ELITE\)](#)

The recipe nutrients section displays a detailed breakdown of the recipe ingredients and their corresponding nutrient values per portion. The section also displays a total per portion. The nutrients that are displayed in this section are the nutrients that are marked as active in the Nutrients administration table. The order the nutrients are displayed is based upon the sort order specified in the Nutrients administration table.

To Access and View Recipe Nutrients:

1. Click **Recipes**
2. Search for recipe by name in search field
3. Click on recipe to open
4. Click on **Nutrients** in the navigation tabs on the left hand side

A user may override the nutrient profile that is assigned to an item/ingredient for the specific recipe in the nutrients section. This functionality is typically used when the item's selected nutrient profile (from the Items section) is for a cooked version of the item and the item/ingredient is being used as raw in the specific recipe.

To Override Ingredient Nutrient Profile:

1. Click **Recipes**
2. Search for recipe by name in search field
3. Click on recipe to open
4. Click on **Nutrients** in the navigation tabs on the left hand side
5. Click on **Edit** for the ingredient whose nutrient profile is to be overridden
6. Search for new nutrient profile
7. Select desired nutrient profile
8. Click **Save**

## Recipe Allergens

Assigning allergens to recipes plays a large role in conflict generation. If a recipe with an assigned allergen appears on a menu linked to a resident with the same allergen, the software generates a conflict notifying the user of the issue and prompting the user to provide a resolution. See the Conflicts chapter for additional information.

## Recipe Preferences

Preferences can be assigned to recipes to identify likes/dislikes that may be associated with the recipe. For example, the preferences of peas and chicken may be associated with the Chicken Pot Pie recipe. If peas and/or chicken are assigned as a resident like or dislike, the application will generate a (L) or (D) icon after the recipe should it be placed on a menu and appear in the resident menu selections section. The (L) and (D) designation communicates to the user whether the recipe(s) being offered for the meal are items that the resident has already disclosed as a like or dislike. As a result, the user may proactively offer an alternate recipe in replacement of the dislike.

Dinner ▾ in Use default (Main Dining Room) ▾ at Use default (Table 1 Seat 1) ▾

[Add Other](#)  [View Tray Ticket](#) 

<b>Cold Beverages</b>	<b>Starch</b>
Beverage Of Choice	Potatoes, Hashbrown Casserole
<b>Fruit</b>	<b>Red Meat</b>
Peaches, Poached 	Ham, Orange Glazed
<b>Vegetable</b>	<b>Milk</b>
Vegetable Blend	Milk

## Recipe Reports Generated in Recipe Record (RDS ELITE)

The following reports can be generated directly from the recipe record: Recipe Food Cost Report and Recipe Report. All reports accessible from the recipe record can be generated from the left hand side navigation tab.

The Recipe Report can be customized by entering up to 6 different yields and selecting to include recipes within recipes and standard nutrients. Yields can be entered by adding the value to the yields field and hitting the Enter or Tab key on the keyboard. When selecting to include standard nutrients, the following nutrients and per portion values will display across the top of the report: Calories, Protein, Dietary Fiber, Fat, Carbohydrates, Cholesterol, Sodium and Calcium.

# Nourishments

The Nourishments section provides users with the functionality to build facility nourishment menu templates for specific menu types. This section is particularly useful for those facilities that provide most residents with the same nourishment offering/menu. Creating nourishment menu templates streamlines the process of assigning nourishments to residents preventing the user from entering the same nourishment menu for multiple residents. Nourishment menu templates are assigned to appropriate menu types allowing the system to pre-populate resident nourishments based on their assigned menu type.

In this chapter you will learn about ...

- Adding New Nourishment Menu
- Editing Nourishment Menu Details
- Editing Nourishment Menu Cycle Length
- Copying Nourishment Menus

## Adding New Nourishment Menus

1. Click **Nourishments**
2. Click **Add New Nourishment Menu**
3. Enter nourishment name
4. Select associated menu type(s)
5. Select meal period(s)
6. Click **Save**

Once the nourishment menu detail has been created/added, clicking on a specific day of the week will drill down into the day allowing for the addition of nourishments to applicable nourishment and non-nourishment meal periods. Clicking “Add New +” allows the user to search for nourishments to add to the menu. Begin by typing and searching for the desired nourishment within the “search for nourishments” field. The returned results are recipes that are marked as nourishments in the Recipes section. If the desired item is not returned in the results, go to the Recipes section and verify that the recipe exists. If the recipe does exist, open the recipe, and verify that it is checked as a nourishment. If the recipe does not exist, follow the steps to add a new recipe and be certain it is marked as a nourishment.

## Editing Nourishment Menu Details

1. Click **Nourishments**
2. Click **Edit**
3. Edit nourishment menu name, associated menu types or assigned meal periods
4. Click **Save**

**Warning:** Removing an assigned meal period within the edit function will permanently delete any nourishments that were planned for the corresponding period.

## Editing Nourishment Menu Cycle Length

1. Click **Administration**
2. Click **Facility Settings** in the navigation tabs on the left hand side
3. Click the facility name in the table
4. Under nourishment options, edit the number of weeks in cycle and verify the current nourishment week in production
5. Click **Submit**

**Warning:** If the number of weeks in the cycle is reduced, clicking submit will produce a confirmation “You are deleting resident and nourishment menu data. Proceed?” Click the button to proceed and reduce the number of weeks in the nourishment menu cycle. Reducing the number of weeks will permanently delete any nourishments assigned to the deleted week(s) within the Nourishment section as well as any resident write-in nourishments assigned to the deleted week(s) within the resident records.

## Copying Nourishment Menus

1. Click **Nourishments**
2. Click **Copy**
3. Re-name/edit nourishment menu name (by default, menu name will appear as xx\_copy)
4. Select new associated menu type(s)
5. Select meal period(s) to copy
6. Click **Save**

A menu type can only be assigned to one nourishment menu at a time. If the menu type is grayed out and unavailable for selection, it must first be removed from the existing nourishment menu before it can be assigned to a new nourishment menu.

## Deleting Nourishment Templates

1. Click **Nourishments**
2. Click **Delete**
3. Click **Yes** to the warning message 'Are you sure you want to delete this menu?'

**Warning:** When deleting a nourishment template, all assigned recipes from the menu will also be removed from a resident's record. Please review all assigned nourishments to residents when making changes to nourishment templates.

# Menus

The Menus section provides users with the functionality to build and maintain cycle menus. Menus can be developed, managed, implemented or archived for various menu types. The menu section allows the user to place a menu into production as well as define how long the menu will stay in production. In addition to cycle menus, menus developed for special events (e.g. Holidays) can also be produced and implemented for a specific date.

In this chapter you will learn about ...

- Adding New Menus
- Editing Menu Details
- Editing Menu Content
- Costing
- Nutrients
- Choice Groups
- Global Menu Changes
- Global Meal Forecast
- Copying Menus
- Archiving Menus/De-archiving Menus
- Deleting Menus
- Activating Menus
- Removing or Replacing Menus in Production
- Menu Overrides
- Alternate Menu

## Adding New Menus

1. Click **Menus**
2. Click **Add New Menu**
3. Enter menu name
4. Enter number of days in cycle
5. Choose applicable menu type
6. Select meal periods
7. Click **Save**

## Editing Menu Details

1. Click **Menus**
2. Click **Available Menus**
3. Under actions, click **Edit** on the desired menu
4. Edit menu name, number of days in the cycle, assigned menu type and/or included meal periods (Number of days in the cycle, menu type and meal periods cannot be edited if the menu is currently in production)
5. Click **Save**

## Editing Menu Content

1. Click **Menus**
2. Click **Available Menus**
3. Click to open the desired menu to edit
4. Click on the specific day to edit
5. To add a recipe: Click **Add Recipe** for the desired meal period and search by keyword for recipe. Toggle Yes/No for “Is this a house menu item?” and Yes/No for “Add to all breakfast/lunch/dinner?” Click **Add**
6. To delete a recipe: Click on the **X** next to the recipe. Click **Yes** to “Are you sure you want to delete this recipe?”
7. To edit house menu item: Click on the **H** in the house menu column. The green H icon designates a house menu item and a gray H icon designates an alternate offering (or non-house menu item)
8. To edit forecasting percentage: Click on the existing number in the % column for the desired recipe. Update the number and click **Save**
9. To edit additional servings: Click on the existing number in the Add'l Servings column for the desired recipe. Update the number and click **Save**

Recipes are displayed in the order they are added. Users are able to drag/drop recipes into a desired order. Recipes are displayed on the weekly view and menu calendar report in the order they are placed on the menu details page.

## Costing [\(RDS ELITE\)](#)

The menu costing section displays a detailed breakdown by meal period of recipes, cost per serving and extended cost. Meal period cost per serving totals as well as total per day (also known as Price per Resident Day or PRD) is displayed. Totals are based on recipes marked as house items.

To Access and View Menu Costing:

1. Click **Menus**

2. Click **Available Menus**
3. Click to open the desired menu
4. Click on the specific cycle day
5. Click on **Costing** in the navigation tabs on the left hand side

## Nutrients (RDS ELITE)

The menu nutrient section displays a detailed breakdown of the meal period recipes and their corresponding nutrient values per portion. The section also displays meal period nutrient totals and totals per day. Totals are based on recipes marked as house items. The nutrients that are displayed in this section are the nutrients that are marked as active in the Nutrients administration table. The order the nutrients are displayed is based upon the sort order specified in the Nutrients administration table.

To Access and View Menu Nutrients:

1. Click **Menus**
2. Click **Available Menus**
3. Click to open the desired menu
4. Click on the specific cycle day
5. Click on **Nutrients** in the navigation tabs on the left hand side
6. Click **Show Nutrients**

## Choice Groups

Choice group functionality allows users to assign recipes to different offering/choice groups making it easier for staff to offer choices to residents that include a set of recipes that should be served together (e.g. Choice Group 1 – Baked Chicken, Mashed Potato and Corn vs. Choice Group 2 – Roast Beef, Baked Potato and Green Beans). Choice group functionality is displayed on the menu detail page when 'Display Choice Groups' is selected in the Facility Settings.

To Display Choice Group Functionality:

1. Click **Administration**
2. Click **Facility Settings**
3. Click/Select Display Choice Groups
4. Click **Submit**

To Add Choice Groups to Meal Periods/Assign Recipes to Choice Groups:

1. Click **Menus**
2. Click **Available Menus**
3. Click to open the desired menu to edit
4. Click on the specific day to edit

5. Click **Add Choice Group** for corresponding meal period (Note: User can add up to 5 choice groups)
6. Drag/drop existing recipes to desired choice groups

OR

1. Click **Menus**
2. Click **Available Menus**
3. Click to open the desired menu to edit
4. Click on the specific day to edit
5. Click **Add Recipe** for corresponding meal period and search by keyword for recipe
6. Select **Choice Group(s)**
7. Click **Add**

Users are able to drag/drop recipes into a desired order. Recipes are displayed on the weekly view under their respective choice group and in the order they are placed on the menu details page.

To Delete a Choice Group:

1. Click **Menus**
2. Click **Available Menus**
3. Click to open the desired menu to edit
4. Click on the specific day to edit
5. Click on the **X** next to the choice group
6. Click **Yes** to 'Are you sure you want to delete this choice group?'

Note: When a choice group (that contains recipes) is deleted, the assigned recipes will be moved to the Unassigned to Group category. The user may then drag/drop the recipes to another choice group or delete the recipes.

To Reorder Choice Groups:

1. Click **Menus**
2. Click **Available Menus**
3. Click to open the desired menu to edit
4. Click on the specific day to edit
5. Click **Reorder Choice Groups** for corresponding meal period
6. Toggle Yes/No to "Reorder All Breakfast/Lunch/Dinner?"
7. Click **Reorder**

When a choice group is deleted, the choice groups are not automatically reordered. For example, if there are three choice groups, and the 2<sup>nd</sup> choice group was deleted, the application would display Choice Group 1 and Choice Group 3. If the user clicks to add another choice group before reordering, the 2<sup>nd</sup> choice group would be added again. If the user does not add another

choice group and wants to rename Choice Group 3 to Choice Group 2, then the user will utilize the Reorder Choice Groups functionality.

## Global Menu Changes

Global Menu Changes provide the functionality to globally add, delete and/or replace recipes on selected menu(s) making it easier and more efficient to build and manage menus. The global add and global delete functionality provides the ability to add/delete a recipe to/from multiple menus, weeks, days and/or meal periods through one function. The global replace functionality provides the ability to replace every instance of a single recipe with another recipe without having to scan through all days and meal periods on a cycle menu.

Global Add:

1. Click **Menus**
2. Click **Global Menu Changes**
3. Click **Global Add**
4. Select **Menu** filter(s)
5. Select **Meal Period(s)**
6. Select **Week(s)**
7. Select **Weekday(s)**
8. Search for desired recipe to add
9. Toggle yes/no to whether or not the recipe is to be added as a House item
10. Enter recipe's **Forecasting %**
11. Click **Add**

Global Delete:

1. Click **Menus**
2. Click **Global Menu Changes**
3. Click **Global Delete**
4. Select **Menu** filter(s)
5. Select **Meal Period(s)**
6. Select **Week(s)**
7. Select **Weekday(s)**
8. Search for desired recipe to delete
9. Select **House Item Status**
10. Click **Delete**

Global Replace:

1. Click **Menus**
2. Click **Global Menu Changes**
3. Click **Global Replace**

4. Select **Menu** filter(s)
5. Select **Meal Period(s)**
6. Select **Week(s)**
7. Select **Weekday(s)**
8. Search for desired recipe to replace
9. Select **House Item Status** for recipe being replaced
10. Search for desired replacement recipe
11. Toggle yes/no to whether or not the replacement recipe is to be added as a House item
12. Enter replacement recipe's **Forecasting %**
13. Click **Replace**

Note: When globally deleting or replacing, selecting the house item status provides the flexibility to delete or replace only the instances of a recipe when it is on the menu designated as a house item or a non-house item (alternate). By selecting "both" in the drop down, the recipe will be deleted and/or replaced regardless of its house item status.

## Global Meal Forecast

Global Meal Forecast provides the option of globally setting forecasting percentages for selected menu(s), recipe type(s), and all house or all non-house recipes. The global option streamlines the process for updating forecasting percentages and eliminates the need to update each recipe's forecasting percentage individually.

1. Click **Menus**
2. Click **Global Meal Forecast**
3. Select menu(s)
4. Select recipe type(s)
5. Enter forecasting percentage
6. Select All House and/or All Non-House
7. Click **Save**

## Copying Menus

1. Click **Menus**
2. Click **Available Menus**
3. Under actions, click **Copy** on the desired menu
4. Re-name/edit menu name (by default, menu name will appear as xx\_copy)
5. Enter number of days in the cycle
6. Select menu type
7. Select meal period(s) to copy
8. Click **Save**

## Archiving Menus/De-archiving Menus

To archive:

1. Click **Menus**
2. Click **Available Menus**
3. Locate the desired menu name
4. Under Actions, Click **Archive**
5. Are you sure you want to archive this menu? Click **Yes**

Note: Users are unable to archive menus that are in production.

To de-archive:

1. Click **Menus**
2. Click **Archived Menus**
3. Locate the desired menu name
4. Under Actions, Click **De-archive**

After clicking de-archive, the menu will appear in the Available Menus list.

## Deleting Menus

Menus may be permanently deleted from the software after the menu is moved to the Archived Menus section.

1. Follow the instructions for archiving a menu
2. Click **Menus**
3. Click **Archived Menus**
4. Locate the desired menu name
5. Under Actions, Click **Delete**

## Activating Menus

1. Click **Menus**
2. Click **Available Menus**
3. Locate the desired menu name
4. Under Actions, Click **Activate**
5. Select the start date
6. Select the end date or enter the number of days to run
7. Click **Activate**

Once menu(s) are activated, they will appear in the 'In Production' tab with their corresponding start and end date. Menu(s) with the current day's date located within its defined date range are considered active and available to assign to a resident. Once the active menu is assigned to a resident, the resident menu selection section is updated with the corresponding offerings.

## Removing Menus in Production or Editing Menu Production Dates

### Removing Menus in Production

1. Click **Menus**
2. Click **In Production**
3. Under actions, click **Remove** on desired menu

Note: Only menus that are currently unassigned to residents and/or are activated for a future date range can be removed from in production in this manner.

### Editing Menu Production Dates

Users are unable to activate more than one menu at a time with the same menu type and identical or overlapping date ranges. If the user would like to activate a new menu in this scenario, the user will need to utilize the edit action to change the current menu's end date before being able to activate the new menu.

1. Click **Menus**
2. Click **In Production**
3. Under actions, click **Edit** on desired menu
4. Edit the end date or the number of days to run
5. Click **Save**

Note: If the menu is currently assigned to resident(s), the menu cannot be simply removed. The menu end date must be edited to a date that does not overlap with the desired date range for the newly activated menu with the same menu type. Users can identify if the menu is currently assigned to residents by viewing the available options under actions. Users will be presented with the remove action if the menu is unassigned to residents and/or is active for a future date range.

## Menu Overrides

Menu overrides allow for temporary menu replacement for a single date or date range as well as for specific meal period(s). The menu override functionality is most frequently utilized for the implementation of theme meals/days or holiday menus.

1. Click **Menus**
2. Click **In Production**
3. Under actions, click **Override** on desired menu
4. Select override template (menus may only be overridden with menus that are assigned to the same menu type)
5. Select the start date
6. Select the end date or the number of days to run
7. If the override is to be restricted to a specific meal period(s), select accordingly

## 8. Click **Activate**

The menu template that is selected to override the existing menu will display in the production section for the given meal(s)/date(s) it was activated. It will also display within the resident menu selections section for the given meal(s)/date(s) it was activated allowing the resident to make selections off of the override template.

A menu may only be overridden once for the exact same date(s) and/or meal period(s).

## Creating Nourishment Templates from Menus

A user can build or edit a menu to include snacks or nourishments as a meal period. Added recipes marked as House will be included in applicable reports such as the Menu Cost Report, Menu Analysis Report, Menu Calendar Report, and Menu Spreadsheet Report.

The +Nourish button allows a user to copy recipes from a menu's snack meal periods and create a nourishment template that can be assigned to residents.

1. Click **Menus**
2. Click **Available Menu**
3. Under Actions, Click **Nourish +** on desired menu
4. Verify the Nourishment Template's name and meal periods
5. Click **Submit**

## Alternate Menu

The alternate menu, sometimes referred to as the always available menu, can be created in the Menus section like the creation and activation of cycle menus. After an alternate menu is created and activated, it can be accessed through the Resident Menu Selections section making it easy to add/select a recipe from the alternate menu/always available list if the resident refuses the primary offering(s) on the cycle menu.

### Creating an Alternate Menu

1. Click **Menus**
2. Click **Add New Menu**
3. Enter menu name (e.g. Alternate Menu or Always Available)
4. Enter number of days in cycle
5. Select the 'Alternate' menu type (If the menu type drop down does not contain an 'Alternate' menu type, then it will need to be added to the menu type administration table first. Reference the Administration Tables section of the manual for additional assistance.)
6. Select meal periods
7. Click **Save**

Note: If your alternate menu/always available list contains the same recipes every day, then the menu can be created for 1 day only. Upon activation, the menu can be repeated daily. If you have a day of the week specific alternate menu that stays the same from week to week, then the menu can be created for 1 week/7 days.

The alternate menu will only be accessible from within the Resident Menu Selections section if the Alternate menu type is selected for the menu. No other custom terminology/spelling for the Alternate menu type will work with this functionality.

### Activating an Alternate Menu

1. Click **Menus**
2. Click **Available Menus**
3. Locate the alternate menu
4. Under Actions, Click **Activate**
5. Select the start date
6. Select the end date or enter the number of days to run
7. Click **Activate**

### Accessing the Alternate Menu in Resident Menu Selections

1. Click **Residents**
2. Search for resident
3. Click to open resident
4. Click **Menu Selections** in the navigation tabs on the left hand side
5. Click **Add Other**
6. Select **Alternate Menu** tab
7. Select a recipe from the alternate menu for the specified meal period
8. Click **Save**

Once the recipe is added from the alternate menu and is selected in the Resident Menu Selections section, the recipe will generate on applicable reports such as the resident's tray ticket and the production guide report.

# Conflicts

The Conflicts section provides users with notification(s) of allergen conflicts prompting the user to resolve the conflict by serving an appropriate alternative or replacement. The primary purpose of the conflict section is to increase safety and avoid circumstances where residents are served items that have been identified as a resident allergy.

Conflicts are triggered by certain events such as placing a new menu into production, assigning a new allergy to a resident, changing a recipe on a menu, etc. The conflicts are generated immediately following the event, and will produce a yellow notification to the user communicating the number of conflicts generated by the recent change. The conflicts are housed in the active conflicts list until the user resolves.

In this chapter you will learn about ...

- Active Conflicts
- Resolving Conflicts
- Editing Resolved Conflicts

## Active Conflicts

Active conflicts are outstanding notifications that the user has not resolved. Active conflicts require the user to review and resolve by selecting a recipe to be served as a replacement to the resident.

## Resolving Conflicts

Resolving conflicts is the process of identifying and selecting an appropriate replacement for the item generating the conflict. Once the user has identified and selected the replacement item, the active conflict becomes a resolved conflict.

1. Click **Conflicts**
2. Review active conflicts
3. Click **Add Resolution**
4. Search or select a menu item that is an appropriate replacement
5. Click **Save**

## Editing Resolved Conflicts

Users can edit resolved conflicts by visiting the Resolved Conflicts section of the software.

1. Click **Conflicts**
2. Click **Resolved Conflicts**
3. Click the edit button
4. Search or select a different menu item that is an appropriate replacement
5. Click **Save**

If a change occurs to a resident's allergen(s) or to a recipe's assigned allergen(s), active conflicts and resolved conflicts will be removed from the Conflicts section and the correct menu item(s) will be reintroduced to the resident's menu selections.

**Warning!** When deleting active conflicts and conflict resolutions, we strongly recommend reviewing resident menu selections before service when there is a change involving allergens. If a conflict is removed, the resident's menu selections will be altered. Please review and confirm the correct selections are present.

# Production

The Production section provides the user with the ability to view all menu items that need to or may need to be prepared and served for the day based on the menus within the facility, facility census and resident selections. The production section provides the user with functionality to make last minute menu changes without impacting the integrity of the master cycle menu(s). Menu changes made within the production section impact only the specified or selected calendar date, and does not alter the cycle menu.

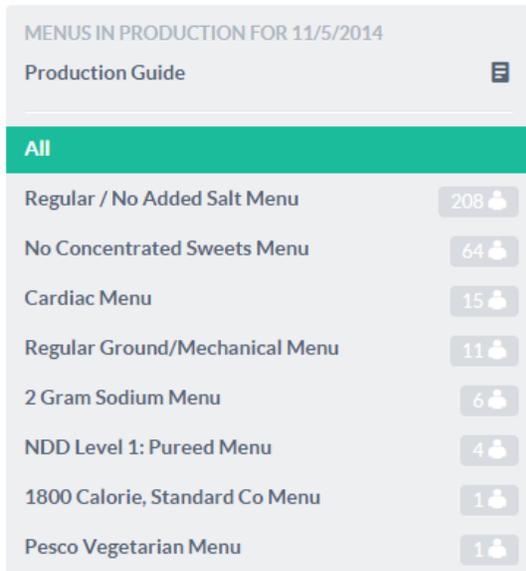
In this chapter you will learn about ...

- Menus in Production
- Adding New Recipes to Production Menu
- Production Overrides
- Production Guide

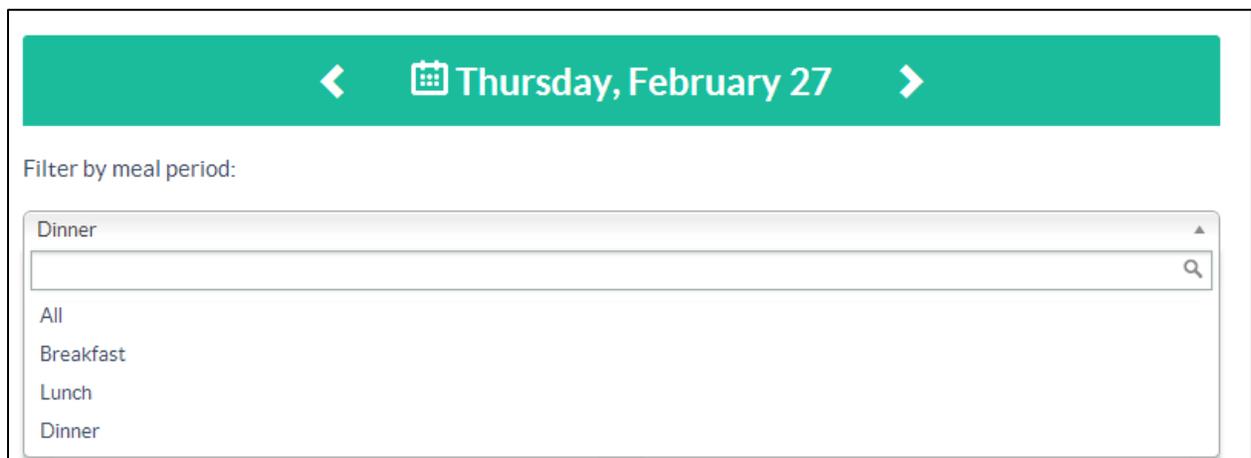
## Menus in Production

Menus that have been activated for a date range that contains the current calendar date will be visible within the production section. The production section provides a list of all menu items that need to or may need to be prepared for the day and can be filtered by meal period or menu. The user is able to view the number of residents currently admitted/on-site that are assigned to each menu offering with house or resident specific selections. This information is designated next to the menu name in the gray navigation pane on the left hand side.

To filter the list by menu, click on the desired menu name in the gray navigation pane on the left hand side.



To filter the list by meal period, select the desired meal period from the 'Filter by meal period' drop down.



## Adding New Recipes to Production Menu

A user may add new recipe(s) to the production menu by menu and meal period or apply to all menus and/or meals.

1. Select the desired menu in the left hand navigation (selecting All will apply the override to all menus)
2. Select the desired meal period from the Filter by Meal Period drop down
3. Click **Add New** next to the desired meal period
4. Search for desired recipe
5. Choose **Yes** or **No** to 'Add to House?' (Selecting Yes will add the recipe as selected/highlighted for those residents assigned to the house menu)

6. Choose **Yes** or **No** to 'Apply recipe to all meals today?' (Selecting Yes will add the recipe to all main meal periods)
7. Click **Save**

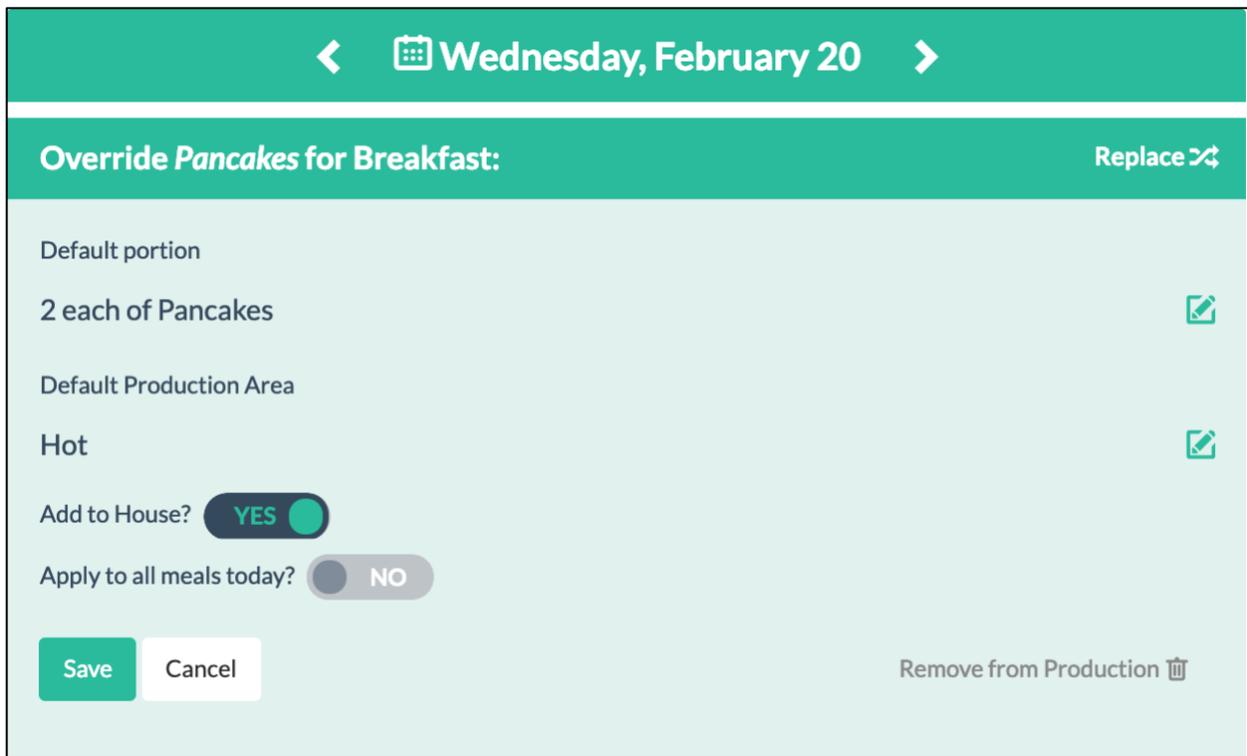
The software will generate an override message notifying the user of the addition and its corresponding menu(s) and meal period(s). The newly added recipe will appear on the production menu screen with the image of a lock. The user may delete the override as well as obtain additional information surrounding the user who made the addition and the date/time the addition was made through the override notification.

To delete the override:

1. Click **View \_ Overrides**
2. Click **Delete**

## Production Overrides

In addition to adding recipes to the production menu, a user is able to make production overrides consisting of deletions, edits, and replacements.



The screenshot shows a mobile application interface for managing production overrides. At the top, a teal header bar contains a back arrow, a calendar icon, the date "Wednesday, February 20", and a forward arrow. Below this, a teal bar displays the title "Override Pancakes for Breakfast:" and a "Replace" button with a circular arrow icon. The main content area is light teal and contains several settings: "Default portion" with the value "2 each of Pancakes" and an edit icon; "Default Production Area" with the value "Hot" and an edit icon; "Add to House?" with a toggle switch set to "YES"; and "Apply to all meals today?" with a toggle switch set to "NO". At the bottom left, there are "Save" and "Cancel" buttons. At the bottom right, there is a "Remove from Production" button with a trash can icon.

To replace an item on the production menu:

1. Select the desired menu in the left hand navigation (selecting All will apply the override to all menus)
2. Select the desired meal period from the Filter by Meal Period drop down

3. Click on the desired recipe on the production menu
4. Click **Replace**
5. Search for desired replacement recipe
6. Choose **Yes** or **No** to 'Add to House?'
7. Choose **Yes** or **No** to 'Apply to all meals today?'
8. Click **Save**

To remove an item on the production menu:

1. Select the desired menu in the left hand navigation (selecting All will apply the override to all menus)
2. Select the desired meal period from the Filter by Meal Period drop down
3. Click on the desired item on the production menu
4. Click **Remove from Production**
5. Check or uncheck to apply to all meals
6. Click **Yes** to 'Are you sure want to remove?'

To edit an item on the production menu:

1. Select the desired menu in the left hand navigation (selecting All will apply the override to all menus)
2. Select the desired meal period from the Filter by Meal Period drop down
3. Click on the desired recipe on the production menu
4. Edit the portion size or production area
5. Choose **Yes** or **No** to 'Add to House?'
6. Choose **Yes** or **No** to 'Apply to all meals today?'
7. Click **Save**

A conflict notification will generate to the user if he/she is attempting to remove an item from the production menu that is currently assigned to a resident's house menu. The notification serves as a warning to the user that they are removing an item from a resident's non-select/house menu and not providing a replacement.

## Production Guide

The Production Guide report can be generated directly from the left side navigation in the Production section. The Production Guide cannot be customized when generated from this section. For Production Guide customizations, access the report through the Reports section.

# Reports

The Reports section provides the user with access to generating and printing resident, recipe, menu and production related reports. All reports generated in the software open in an additional window/tab.

In this chapter you will learn about ...

- Tray Cards and Tray Tickets
- Meal Selection Forms
- Patient Identifiers on Cards/Tickets/Meal Selection Forms
- Nourishment Labels
- Remaining Resident Reports
- Recipe Reports
- Menu Reports
- Production Reports
- Printing Reports
- Saving Reports

## Tray Cards and Tray Tickets

### Tray Cards

Tray Cards provide a system to organize, maintain and implement pertinent resident information and menu related details such as resident room and dining locations, diet order and menu type assignments, special notes, individual allergies, meal preferences, likes and dislikes. If the recipe that is to print on the resident's tray card as either a resident meal preference or nourishment has the fluid consistency toggle set to 'yes' (located within the Recipe Detail Section), the recipe will print with the resident's assigned fluid consistency preceding the recipe name (e.g. Honey Thick Apple Juice). Please note that the fluid consistency terminology does not print preceding recipe names that have been added to the likes or dislikes sections on the tray cards – only meal preferences and nourishments.

### Tray Tickets

Tray Tickets are printed for residents during non-nourishment meal periods and provide an actual list of menu items that should be provided on the tray and served to the resident. The Tray Ticket lists important resident details such as the resident's name, diet order, menu type and allergies to assist foodservice staff and/or tray line in delivering the appropriate menu items

to the correct resident. The Tray Ticket also lists the menu items and portion sizes based upon the resident's menu selections or the specific menu type's house diet. If the recipe that is to print on the resident's tray ticket has an assigned serving utensil, the tray ticket report will include serving utensil information displayed in parenthesis after the recipe portion size. If the recipe that is to print on the resident's tray ticket has the fluid consistency toggle set to 'yes' (located within the Recipe Detail Section), the recipe will print with the resident's assigned fluid consistency preceding the recipe name (e.g. Honey Thick Apple Juice). This functionality impacts the recipes on the tray ticket that are grouped under the production area or recipe type as well as recipes assigned as meal preferences and/or nourishments.

Generating Tray Cards and Tray Tickets:

1. Click **Reports**
2. Click **Tray Cards** or **Tray Tickets**
3. Click **Default Template**
4. Select **Start Date** and **End Date**
5. Select **Meal Periods**
6. Select **Areas** filter(s) (optional)
7. Select **Dining Areas** filter(s) (optional)
8. Select **Seating Location** filter(s) (optional)
9. Select **Room Route** filter(s) (optional)
10. Choose **Sort By:** option
11. Select **Include:** option(s)
12. Click to select specific resident(s) and use the arrows to include and/or remove (if residents are not selected, the report will default to include all)
13. Click **Open in PDF**

Tray cards and/or tray tickets that contain too much information for one card/ticket will flow onto a second card/ticket. The cards/tickets will be displayed with 1/2 and 2/2 to communicate that multiple cards/tickets printed for the resident for the meal period.

## Meal Selection Forms

The Meal Selection Forms provide users with a menu containing all available offerings that can be passed out to the residents allowing them to mark/circle their selections. The meal selection form differs from the tray ticket as it lists ALL available offerings for the meal grouped by recipe type. The tray ticket only lists the items selected by the resident and is an exact depiction of what should be placed on the tray.

The Meal Selection Forms can be generated with or without portion sizes on display as well as with or without customized instructions. The portion size display and meal selection report instruction are managed from the Administration section and Facility Settings.

To Manage Portion Sizes on Meal Selection Form:

1. Click **Administration**
2. Click **Facility Settings** located in the navigation tabs on the left hand side
3. Click on facility name to open settings
4. Check or uncheck 'Display Portion Size' under Meal Selection Form Options
5. Click **Submit**

To Manage Meal Selection Report Instruction:

1. Click **Administration**
2. Click **Facility Settings** located in the navigation tabs on the left hand side
3. Click on facility name to open settings
4. Enter text in the Meal Selection Report Instruction field under Meal Selection Form Options
5. Click **Submit**

Generating Report:

1. Click **Reports**
2. Click **Meal Selection Forms**
3. Select **Start Date** and **End Date**
4. Select **Meal Periods**
5. Select **Areas** filter(s) (optional)
6. Select **Dining Areas** filter(s) (optional)
7. Select **Seating Location** filter(s) (optional)
8. Choose **Sort By:** option
9. Click to select specific resident(s) and use the arrows to include and/or remove (if residents are not selected, the report will default to include all)
10. Click **Open in PDF** or **Export to Excel**

Meal selection forms that contain too much information for one form will flow onto a second form. The forms will be displayed with 1/2 and 2/2 to communicate that multiple meal selection forms printed for the resident for the meal period.

## Patient Identifiers on Cards/Tickets/Meal Selection Forms

Users may change the resident name format on tray cards, tray tickets and meal selection forms. Resident names can be displayed as first\_middle\_last or last\_first\_middle on the reports. An additional patient identifier (patient number or date of birth) can also be selected to print below the resident's name. Changing the name format and patient identifier in facility settings impacts all three of the reports.

1. Click **Administration**
2. Click **Facility Settings**
3. Click on facility name to open settings

4. Under tray ticket options, select desired Report Name Format and Patient Identifier
5. Click **Submit**

## Resident Information Layout on Cards/Tickets/Meal Selection Forms

Resident information on the tray card, tray ticket, and meal selection form can be displayed in the header or footer of the report. The resident information includes name, area/room number, dining area, seating location (optional) and patient identifier (optional). A user can specify which location by selecting header or footer from the drop down.

1. Click **Administration**
2. Click **Facility Settings** in the navigation tabs on the left-hand side
3. Click the facility name in the table
4. Under Tray Card/Tray Ticket Options, select Display Resident Information As and select header or footer from the drop down.
5. Under Meal Selection Form Options, select Display Resident Information As and select header or footer from the drop down.
6. Click **Submit**

## Nourishment Labels

The Nourishment Labels Report provides resident nourishment labels containing the nourishment/recipe name and portion size to assist in the coordination of nourishment production and distribution. The report is available to print to three formatted label templates: Avery 5161 (1" x 4"), Avery 5162 (1-1/3" x 4") or Avery 5163 (2" x 4"). Nourishments from assigned nourishment menu templates as well as nourishments added within the resident record both populate in the report. By checking "Write-Ins Only", only nourishments added as write-ins within the resident record will generate. Selecting the "Allergens" option produces a separate resident allergen label listing all known and assigned resident allergies.

Generating Report:

1. Click **Reports**
2. Click **Nourishment Labels**
3. Select **Start Date** and **End Date**
4. Select **Meal Periods**
5. Choose **Sort by:** option
6. Select **Nourishment Route** filter(s) (optional)
7. Select **Label Size**
8. Check/Uncheck **Include:** options (Allergens and/or Write-Ins Only)
9. Click to select specific resident(s) and use the arrows to include and/or remove (if residents are not selected, the report will default to include all)
10. Click **Open in PDF**, **Export to CSV**, or **Export to Excel**

## Remaining Resident Reports

### Calorie Count Report (Reports > Resident Reports > Calorie Count)

The Calorie Count Report provides a listing of residents grouped by area that have been assigned to a calorie count on the resident diet order tab. The calorie count status terminology will appear on both the tray ticket and tray card as an indicator to staff.

### Diet Census Summary (Reports > Resident Reports > Diet Census Summary)

The Diet Census Summary Report provides a listing of the number of residents (census) prescribed to the facility offered diet orders.

### Diet Census by Area Report (Reports > Resident Reports > Diet Census by Area)

The Diet Census by Area Report provides a listing by area of the number of residents (census) prescribed to a diet order.

### Diet Order Report (Reports > Resident Reports > Diet Order)

The Diet Order Report provides a listing of residents and their assigned diet order and menu type.

### Dislike Conflict Report (Reports > Resident Reports > Dislike Conflict)

The Dislike Conflict Report provides a list of residents that have an outstanding dislike to a recipe on the menu for the selected parameters. The report can be generated to include only the dislikes that are an active menu selection for a resident making it easy for staff to identify residents that require a recipe substitution for the selected date(s) and meal period(s).

Generating Report:

1. Click **Reports**
2. Click **Dislike Conflict**
3. Select **Start Date** and **End Date**
4. Select **Meal Periods**
5. Select **Areas** filter(s) (optional)
6. Select **Dining Areas** filter(s) (optional)
7. Choose **Sort by:** option
8. Check/Uncheck **Include:** option (selected recipes only)
9. Click to select specific resident(s) and use the arrows to include and/or remove (if residents are not selected, the report will default to include all)
10. Click **Open in PDF**, **Export to CSV**, or **Export to Excel**

### Dislike and Allergy Report (Reports > Resident Reports > Dislike and Allergy)

The Dislike and Allergy Report provides a list of food items by dining area that are assigned as a resident dislike or allergy. The report communicates the total number of residents that have either an allergy or dislike to the listed item for the specific meal period.

Generating Report:

1. Click **Reports**
2. Click **Dislike and Allergy**
3. Select **Start Date** and **End Date**
4. Select **Meal Periods**
5. Select **Areas** filter(s) (optional)
6. Select **Dining Areas** filter(s) (optional)
7. Choose **Sort by:** option
8. Check/Uncheck **Include:** options (Dislikes and/or Allergies)
9. Click to select specific resident(s) and use the arrows to include and/or remove (if residents are not selected, the report will default to include all)
10. Click **Open in PDF, Export to CSV, or Export to Excel**

Feeding Devices Report (Reports > Resident Reports > Feeding Devices)

The Feeding Devices Report provides a listing of residents and assigned feeding devices. Feeding devices will appear on both the resident's tray ticket and tray card.

Feeding Devices and Services Total Report (Reports > Resident Reports > Feeding Devices and Services Total)

The Feeding Devices and Services Total Report provides the total number of feeding devices required by meal period.

Generating Report:

1. Click **Reports**
2. Click **Feeding Devices and Services Total**
3. Select **Start Date** and **End Date**
4. Select **Meal Periods**
5. Select **Areas** filter(s) (optional)
6. Select **Dining Areas** filter(s) (optional)
7. Choose **Sort by:** option
8. Click to select specific resident(s) and use the arrows to include and/or remove (if residents are not selected, the report will default to include all)
9. Click **Open in PDF, Export to CSV, or Export to Excel**

Meal Preference Tally Report (Reports > Resident Reports > Meal Preference Tally)

The Meal Preference Tally Report provides a list of meal preferences grouped by recipe type that have been assigned to residents for the specified meal period and day. The report tallies the number needed to gather and/or prepare by dining area as well as an overall total.

Generating Report:

1. Click **Reports**
2. Click **Meal Preference Tally**
3. Click **Default Template**
4. Select **Start Date** and **End Date**
5. Select **Meal Periods**
6. Select **Recipe Types** filter(s) (optional)
7. Select **Dining Areas** filter(s) (optional)
8. Click **Open in PDF**, **Export to CSV**, or **Export to Excel**

Nourishment Cart Report (Reports > Resident Reports > Nourishment Cart)

The Nourishment Cart Report provides a complete list of all residents receiving a snack for the specified nourishment period, what each resident on the report is to be given for a snack, resident room number, diet order and allergies.

Generating Report:

1. Click **Reports**
2. Click **Nourishment Cart**
3. Select **Start Date** and **End Date**
4. Select **Meal Periods**
5. Select **Areas** and **Dining Areas** filter(s) (optional)
6. Select **Nourishment Route** filter(s) (optional)
7. Choose **Sort by:** option
8. Click to select specific resident(s) and use the arrows to include and/or remove (if residents are not selected, the report will default to include all)
9. Click **Open in PDF**, **Export to CSV**, or **Export to Excel**

Off-Site Resident List Report (Reports > Resident Reports > Off-Site Residents)

The Off-Site Resident List Report provides a list of residents that are currently off-site for the selected date range and/or meal periods.

Generating Report:

1. Click **Reports**
2. Click **Off-Site Residents**
3. Select **Start Date** and **End Date**

4. Select **Area** filter(s) (optional)
5. Select **Meal Period** filter(s) (optional)
6. Click to select specific resident(s) and use the arrows to include and/or remove (if residents are not selected, the report will default to include all)
7. Click **Open in PDF, Export to CSV, or Export to Excel**

#### Religion Report (Reports > Resident Reports > Religion)

The Religion Report provides a listing of residents and their associated religion.

#### Resident Birthday List Report (Reports > Resident Reports > Resident Birthday)

The Resident Birthday List Report provides a list of residents that have birthdays during a defined date range and displays the resident's room location, date of birth, age the resident is turning and diet order.

Generating Report:

1. Click **Reports**
2. Click **Resident Birthday**
3. Select **Start Date** and **End Date**
4. Select **Area** filter(s) (optional)
5. Choose **Sort by:** option
6. Click to select specific resident(s) and use the arrows to include and/or remove (if residents are not selected, the report will default to include all)
7. Click **Open in PDF, Export to CSV, or Export to Excel**

#### Resident Detail Report (Reports > Resident Reports > Resident Detail)

The Resident Detail Report provides general resident information including resident notes, diet orders, restrictions and allergies, meal service requirements, meal preferences and nourishments. The report is typically generated for selected resident(s).

#### Resident Dining Area List (Reports > Resident Reports > Resident Dining Area List)

The Resident Dining Area List Report provides a list of residents assigned to each dining area by meal period and day of the week. In addition, the report includes a tally/total number of residents assigned to each dining area.

Generating Report:

1. Click **Reports**
2. Click **Resident Dining Area List**
3. Select **Start Date** and **End Date**
4. Select **Areas** filter(s) (optional)
5. Select **Dining Areas** filter(s) (optional)
6. Select **Meal Periods** filter(s) (optional)

7. Choose **Sort by:** option
8. Click to select specific resident(s) and use the arrows to include and/or remove (if residents are not selected, the report will default to include all)
9. Click **Open in PDF, Export to CSV, or Export to Excel**

#### Resident LDA Report (Reports > Resident Reports > Resident LDA)

The Resident LDA Report provides a listing of residents' meal preferences (i.e. likes) and allergies.

#### Resident Menu Assignment Report (Reports > Resident Reports > Resident Menu Assignment)

The Resident Menu Assignment Report provides a listing of residents grouped by their assigned menu type. The menu type dictates the actual base menu that should be served to a resident. Frequently, facilities will make additional individualized adjustments from the base menu type.

#### Resident Roster Report (Reports > Resident Reports > Resident Roster)

The Resident Roster Report provides a listing of residents and their assigned diet order and menu type sorted by room location.

#### Generating Report:

1. Click **Reports**
2. Click **Resident Roster**
3. Click **Default Template**
4. Select **Area** filter(s) (optional)
5. Select **Diet Order** filter(s) (optional)
6. Choose **Sort by:** option
7. Click to select specific resident(s) and use the arrows to include and/or remove (if residents are not selected, the report will default to include all)
8. Click **Open in PDF, Export to CSV, or Export to Excel**

#### Tube Feeding Report (Reports > Resident Reports > Tube Feeding)

The Tube Feeding Report provides a listing of residents receiving tube feedings as well as identifies the feeding type, feeding rate and special notes. Residents with the tube feeding toggle set to 'yes' are included in this report.

#### Weight History Report (Reports > Resident Reports > Weight History)

The Weight History Report provides a history of recorded weights in comparison to 30/90/180 day prior weights. The report also includes +/- pounds, % weight change and highlights per OBRA regulations.

Generating Report:

1. Click **Reports**
2. Click **Weight History**
3. Click **Default Template**
4. Enter the number of most recent weigh ins to include in the report (report defaults to 'all' unless otherwise noted)
5. Choose **Sort by:** option
6. Select **Area** filter(s) (optional)
7. Click to select specific resident(s) and use the arrows to include and/or remove (if residents are not selected, the report will default to include all)
8. Click **Open in PDF, Export to CSV, or Export to Excel**

## Generating Reports for Specific Residents

Select resident reports within the application provide an option to filter by specified resident(s). The resident filter option provides the functionality to select a single resident or multiple residents to include within the report. The functionality allows the user to click to select/deselect a resident and use the arrows to include/remove from the report or double click the resident to include/remove. By default, if specific resident(s) are not selected, the report will generate with all residents included. The following resident reports contain the resident filter: Calorie Count Report, Diet Order Report, Feeding Devices Report, Religion Report, Resident Detail Report, Resident LDA Report, Meal Selection Forms, Resident Roster, Tray Tickets, Tray Cards, Tube Feeding Report, Weight History Report, Nourishment Labels and Nourishment Cart Report.

## Recipe Reports

Inactive Recipes Assigned to Menu Report (Reports > Recipe Reports > Inactive Recipes Assigned to Menu)

The Inactive Recipes Assigned to Menu Report provides a list of recipes that are assigned to a menu and marked as inactive in the application.

Generating Report:

1. Click **Reports**
2. Click **Recipe Reports**
3. Click **Inactive Recipes Assigned to Menu**
4. Select **Menu** filter(s) (required)
5. Select **Recipe Type** filter(s) (optional)
6. Select **Meal Period** filter(s) (optional)
7. Choose **Sort by:** option

8. Click **Open in PDF**, **Export to CSV**, or **Export to Excel**

### Recipe Report (Reports > Recipe Reports > Recipe) [\(RDS ELITE\)](#)

The Recipe Report provides important information for recipe preparation such as ingredients, ingredient amounts, steps for preparation and HACCP information. The Recipe Report can be scaled and displays ingredient amounts quantified to the entered yield(s).

Generating Report:

1. Click **Reports**
2. Click **Recipe Reports**
3. Click **Recipe**
4. Select **Recipe Status**
5. Select **Recipe Type** filter(s) (optional)
6. Select **Production Area** filter(s) (optional)
7. Select **Menu Names** filter(s) (optional)
8. Enter **Yield(s)** (optional) (Note: To add multiple yields, add the first value to the yields field and hit the Enter or Tab key on the keyboard to enter an additional yield)
9. Check/Uncheck **Options**
  - Include Recipes within Recipes
  - Include Standard Nutrients
10. Click **Open in PDF** or **Export to Excel**

The recipe's nutritional content (per portion) can be displayed at the top of the recipe by selecting to include standard nutrients. The recipe can be displayed with up to 6 different yields on the same page.

### Recipe Allergen Report (Reports > Recipe Reports > Recipe Allergen)

The Recipe Allergen Report provides a listing of active recipes sorted by assigned allergies.

### Recipe Food Cost Report (Reports > Recipe Reports > Recipe Food Cost) [\(RDS ELITE\)](#)

The Recipe Food Cost Report displays a cost breakdown by ingredient making it easy for staff to identify high cost ingredients that may be contributing to a high overall cost per portion. The report provides a cost per recipe and cost per portion.

Generating Report:

1. Click **Reports**
2. Click **Recipe Reports**
3. Click **Recipe Food Cost**
4. Select **Recipe Status**
5. Select **Recipe Type** filter(s) (optional)

6. Select **Production Area** filter(s) (optional)
7. Select **Menu** filter(s) (optional)
8. Choose **Sort by:** option
9. Click **Open in PDF, Export to CSV** or **Export to Excel**

Recipe List Report (Reports > Recipe Reports > Recipe List)

The Recipe Report provides a complete listing of active recipes and the corresponding standard recipe portion size. The report also delivers the recipes' assigned production area and whether the recipe is also considered a nourishment.

## Menu Reports

Menu Calendar Report (Reports > Menu Reports > Menu Calendar)

The Menu Calendar Report provides a printable week at a glance view of the selected cycle menu and displays a list of recipes assigned to each meal period for the days of the week.

Generating Report:

1. Click **Reports**
2. Click **Menu**
3. Click **Menu Calendar**
4. Enter **Start Date** and **End Date**
5. Select **Menu Name**
6. Check/Uncheck **Options**
  - Include House Items Only (Only items marked as 'H' will generate on the report)
  - Include Portion Sizes (Recipe portion sizes will generate on the report)
  - Include Dates (The corresponding date will generate in addition to the day of the week)
  - Include Page Breaks After Meals (Each meal period will generate on a new page)
  - Include Snack Meal Periods
7. Click **Open in PDF, Export to CSV, or Export to Excel**

Menu Cost Report (Reports > Menu Reports > Menu Cost) ([RDS ELITE](#))

The Menu Cost Report provides recipe costs per portion, meal total costs and daily total costs for a specified date range. The Menu Cost Report can be used to identify high cost meals and/or days in the cycle menu. It also provides an average price per resident day (PRD).

Generating Report:

1. Click on **Reports**
2. Click **Menu Reports**
3. Click **Menu Cost**

4. Select **Menu(s)** (required)
5. Select **Meal Period** filter(s) (optional)
6. Select **Recipe Type** filter(s) (optional)
7. Enter **Start Cycle Day** and **End Cycle Day** OR **Start Date** and **End Date** (Note: Selected menu(s) must be in production to utilize the start date and end date functionality)
8. Check/Uncheck **Options**
  - Include House Items Only
9. Click **Open in PDF, Export to CSV** or **Export to Excel**

#### Menu Nutrient Analysis Report (Reports > Menu Reports > Menu Nutrient Analysis) ([RDS ELITE](#))

The Menu Nutrient Analysis Report provides a detailed nutrient analysis by recipe on the selected menu(s) and cycle day(s) including a meal nutrient total and daily nutrient total. The report enables staff to verify that the menu content meets nutritional standards and daily nutrient requirements.

Generating Report:

1. Click **Reports**
2. Click **Menu Reports**
3. Click **Menu Nutrient Analysis**
4. Select **Menu(s)** (required)
5. Enter **Start Cycle Day** and **End Cycle Day** OR **Start Date** and **End Date** (Note: Selected menu(s) must be in production to utilize the start date and end date functionality)
6. Select **Header Display Mode**
7. Check/Uncheck **Options**
  - Include House Items Only
  - Include Snack Meal Periods
8. Click **Open in PDF, Export to CSV** or **Export to Excel**

#### Menu Purchasing Requirements Report (Reports > Menu Reports > Menu Purchasing Requirements) ([RDS ELITE](#))

The Menu Purchasing Requirements Report provides a total/menu needs amount for each item on the selected menu(s) based upon resident menu selections and/or forecasting. The report calculates an amount of each item to order based upon menu needs, resident selections and/or forecasting percentages.

Generating Report:

1. Click **Reports**
2. Click **Menu Reports**
3. Click **Menu Purchasing Requirements**

4. Select **Menu** filter(s) (required)
5. Enter **Start Date/Start Meal Period** and **End Date/End Meal Period**
6. Select **Inventory Group** filter(s) (optional)
7. Select **Vendor** filter(s) (optional)
8. Choose **Generate Report Based On:** Option
9. Check/Uncheck **Options**
  - Consider Batching
  - Include Items with Calculated Amounts of 0
10. Click **Open in PDF, Export to CSV** or **Export to Excel**

#### Menu Spreadsheets Report (Reports > Menu Reports > Menu Spreadsheets)

The Menu Spreadsheets Report provides information to view and compare what is being served on selected menus for specified days in a grid-like format. The report allows the user to view what is being served to the regular menu type in comparison to other the selected menus/menu types. The report lists each selected menu/menu type in a separate column and the menu/menu types' recipes are listed in the order they were placed on the menu detail page.

Generating Report:

1. Click **Reports**
2. Click **Menu**
3. Click **Menu Spreadsheets**
4. Select **Menu(s)**
5. Select **Recipe Type** filter(s) (optional)
6. Select **Meal Period** filter(s) (optional)
7. Enter **Start Cycle Day** and **End Cycle Day** OR **Start Date** and **End Date** (Note: Selected menu(s) must be in production to utilize the start date and end date functionality)
8. Select **Header Display Mode**
9. Check/Uncheck **Options**
  - Include House Items Only
  - Include Blank Column
  - Include Signature Line
10. Select **Print Format**
11. Click **Open in PDF** or **Export to Excel**

The columns on the report can be placed in a desired order. Once the menu(s) are selected, a Reorder Menus option appears. The order the menus are placed on the options page will designate the order menu column order on the report.

To Order the Menu Columns on the Report:

1. Click **Reports**
2. Click **Menu**

3. Click **Menu Spreadsheets**
4. Select **Menu(s)**
5. Drag/Drop menus in desired order under the Reorder Menus section.
6. Select remaining report options
7. Click **Open in PDF** or **Export to Excel**

Recipes within Menus Lookup Report (Reports > Menu Reports > Recipes within Menus Lookup)

The Recipes within Menus Lookup Report provides a summary of where the selected recipe(s) are being used in menus and nourishment menus and how many occurrences exist in the menu.

Generating Report:

1. Click **Reports**
2. Click **Menu Reports**
3. Click **Recipes with Menus Lookup**
4. Select **Menu(s)** (optional)
5. Select **Nourishment Menu(s)** (optional)
6. Select **Meal Periods** (optional)
7. Enter **Start Cycle Day** and **End Cycle Day** (optional)
8. Select **Recipes(s)**
9. Click **Open in PDF**, **Export to CSV** or **Export to Excel**

## Production Reports

Production Guide Report (Reports > Production Reports > Production Guide)

The Production Guide Report provides a listing of recipes by meal period and production area that need to be prepared by foodservice staff for meal service. In addition to the recipe name, the report also includes the standard portion size and number of portions to prepare for each recipe based on the facility's census, menus and residents' menu types and selections. In addition to non-nourishment meal period needs, the report also includes nourishment production. Non-nourishment meal periods (e.g. breakfast, lunch or dinner) contain two 'needed' columns for menu needs and nourishment needs as a recipe may be offered on a menu as well as offered as an additional nourishment to a resident. The totals column reflects the combination of the menu and nourishment needs columns. Nourishment meal periods only contain a totals column. When including meal preferences, the report will only count a recipe once if the recipe is assigned to the resident as a menu selection and meal preference.

Generating Report:

1. Click **Reports**
2. Click **Production**

3. Click **Production Guide**
4. Enter **Start Date** and **End Date**
5. Select **Meal Periods**
6. Select **Menu Types** filter(s) (optional)
7. Select **Dining Areas** filter(s) (optional)
8. Select **Production Areas** filter(s) (optional)
9. Check/Uncheck to include nourishments only
10. Check/Uncheck to include meal preferences
11. Check/Uncheck to include temperature column
12. Check/Uncheck to include serving utensils
13. Check/Uncheck to include leftover quantities
14. Select option to base report on: Actual Counts, Forecasting, or Actual Counts and Forecasting
15. Click **Open in PDF**, **Export to CSV**, or **Export to Excel**

#### Menu Scaled Recipe Report (Reports > Production Reports > Menu Scaled Recipe) [\(RDS ELITE\)](#)

The Menu Scaled Recipe Report provides important information for recipe preparation such as ingredients, ingredient amounts, steps for preparation and HACCP information scaled to production quantities (based on actual counts, forecasting or a combination of actual counts and forecasting). The report eliminates the need for staff members to manually calculate and scale recipes by hand.

Generating Report:

1. Click **Reports**
2. Click **Production Reports**
3. Click **Menu Scaled Recipe**
4. Select **Menu(s)** (required)
5. Select **Meal Period** filter(s) (optional)
6. Select **Production Area** filter(s) (optional)
7. Select **Recipe Type** filter(s) (optional)
8. Enter **Start Date** and **End Date** (required)
9. Choose **Generate Report Based On:** Option
10. Check/Uncheck **Options**
  - Include Recipes within Recipes
  - Consider Batching
  - Consolidate Recipes
11. Click **Open in PDF** or **Export to Excel**

#### Pull/Thaw Report (Reports > Production Reports > Pull/Thaw) [\(RDS ELITE\)](#)

The Pull/Thaw Report provides a list of items and associated quantities (based on actual counts, forecasting or a combination of actual counts and forecasting) that need to be pulled from the shelf to prepare recipes for the selected menus and date range. The report also communicates to staff the items that need to be pulled in advance for thawing. These items will display on the report in a separate thawing section on the day they need to be pulled from the freezer. On the day the item is to be prepared, it is designated with a note stating that the item was already pulled 'x' days prior for adequate thawing.

Generating Report:

1. Click **Reports**
2. Click **Production Reports**
3. Click **Pull/Thaw**
4. Select **Menu(s)** (required)
5. Select **Production Area** filter(s) (optional)
6. Select **Inventory Group** filter(s) (optional)
7. Enter **Start Date** and **End Date** (required)
8. Choose **Generate Report Based On:** Option
9. Check/Uncheck **Options**
  - Consider Batching
  - Include Thawing Information
10. Choose **Sort by:** Option
11. Click **Open in PDF** or **Export to Excel**

## Item Reports ([RDS ELITE](#))

Item List Report (Reports > Item Reports > Item List)

The Item List Report contains a listing of all items in the application with basic information.

Generating Report:

1. Click **Reports**
2. Click **Item Reports**
3. Click **Item List**
4. Select **Food Item Status**
5. Select **Inventory Group** filter(s) (optional)
6. Select **Vendor** filter(s) (optional)
7. Choose **Sort by:** Option
8. Click **Open in PDF**, **Export to CSV** or **Export to Excel**

### Item Lookup Report (Reports > Item Reports > Item Lookup)

The Item List Report contains a listing of selected item's location within Recipes and their associated Allergens.

Generating Report:

1. Click **Reports**
2. Click **Item Reports**
3. Click **Item Lookup**
4. Select a Recipe(s)
5. Click **Open in PDF, Export to CSV or Export to Excel**

### Item Purchasing Report (Reports > Item Reports > Item Purchasing)

The Item Purchasing Report contains a listing of all items and corresponding purchasing information such as vendor, product code, package size and cost information.

Generating Report:

1. Click **Reports**
2. Click **Item Reports**
3. Click **Item Purchasing**
4. Select **Food Item Status**
5. Select **Brand** filter(s) (optional)
6. Select **Inventory Group** filter(s) (optional)
7. Select **Vendor** filter(s) (optional)
8. Choose **Sort by:** Option
9. Click **Open in PDF, Export to CSV or Export to Excel**

### Item Cost History Report (Reports > Items Reports > Item Cost History)

The Item Cost History Report enables a user to view and track changes in price (including % change and % total change) for items allowing the user to determine if the price for an item(s) is increasing and whether they should consider purchasing an alternative/replacement item or purchase the item(s) from another vendor.

Generating Report:

1. Click **Reports**
2. Click **Item Reports**
3. Click **Item Cost History**
4. Enter **Start Date** and **End Date** (required)
5. Select **Food Item Status**
6. Select **Brand** filter(s) (optional)
7. Select **Inventory Group** filter(s) (optional)

8. Select **Vendor** filter(s) (optional)
9. Check/Uncheck to Include **Primary Vendor Items Only**
10. Click **Open in PDF**, **Export to CSV** or **Export to Excel**

Item Cost Update Exceptions Report (Reports > Item Reports > Item Cost Update Exceptions)

The Item Cost Update Exception Report is available for user to view which vendor items were not updated during the import. This report is available immediately following an import or from the Reports section.

Generating Report:

1. Click **Reports**
2. Click **Item Reports**
3. Click **Item Cost Update Exceptions Report**
4. Select **Food Item Status**
5. Select **Vendor(s)**
6. Click **Open in PDF**, **Export to CSV** or **Export to Excel**

## Vendor Reports [\(RDS ELITE\)](#)

Vendor List Report (Reports > Vendor Reports > Vendor List)

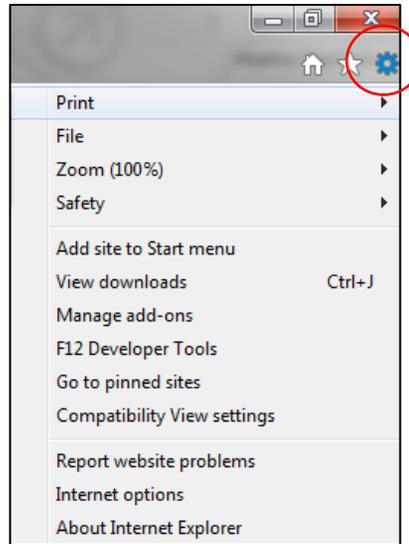
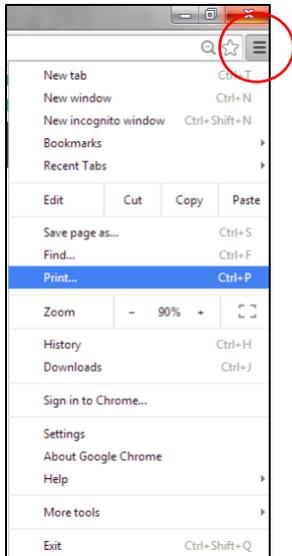
The Vendor List Report provides a complete listing of active vendors and their corresponding mailing address and contact information. The report can be used as a facility reference to verify the vendors listed in the application for assignment to food items.

## Printing Reports

All reports generated in the software open in an additional window/tab. To print, right click on the report and select print or navigate to the web browser's tools menu (varies by browser) and click print. To close the report, simply click the X on the report's window/tab.

Google Chrome Example:

Internet Explorer Example:



All reports are formatted to print on standard letter size 8-1/2 x 11 paper. Tray cards, tray ticket and meal selection forms may be printed on tri-fold perforated 8-1/2 x 11 paper for easy separation and distribution. Nourishment labels are formatted to print on three Avery templates: Avery 5161 (1" x 4"), Avery 5162 (1-1/3" x 4") or Avery 5163 (2" x 4").

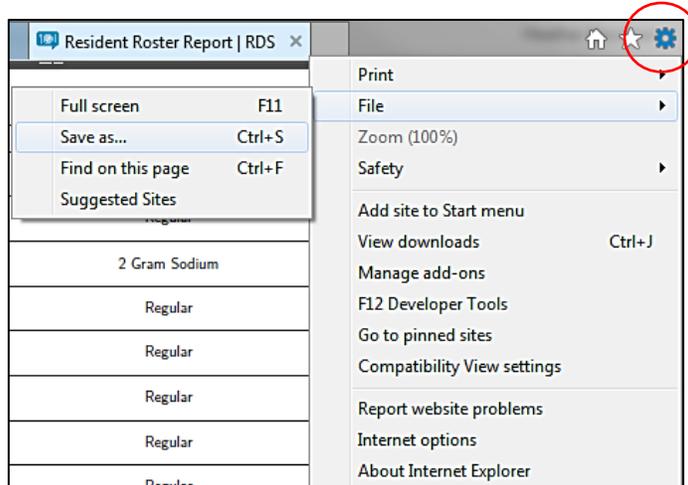
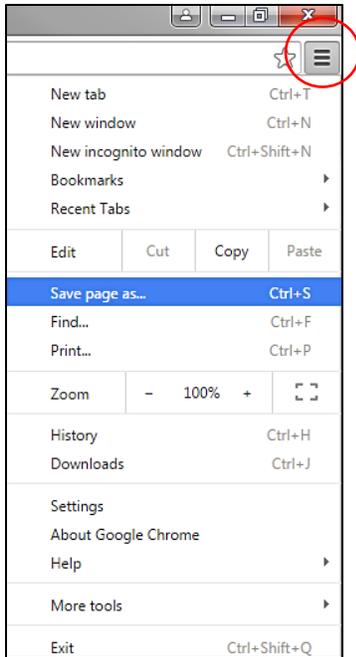
All reports open in PDF format. A basic pdf viewer/reader is required to generate and view these reports. Select reports also include the option to export to CSV or Microsoft Excel formats.

## Saving Reports

All reports can be saved in PDF format. Once the report has been generated/opened in PDF, click on the web browser's tools menu (varies by browser) and click save as.

Google Chrome Example:

Internet Explorer Example:



Clicking Export to CSV or Export to Excel from the report options page downloads the report file. The downloaded file can be opened or saved. If the CSV or Excel file format is opened within Microsoft Excel, the report can be saved by clicking on the File tab. Click **File > Save As**. Under **Save As**, pick the place where you want to save the file. For example, save the file to your desktop or in a folder on your computer.

## Report Templates

Select reports contain the functionality to choose filter, sort and resident options and save the selections as a unique report template. The saved unique report template(s) become an available option to select on the report options page eliminating the need to re-select the same options every time the report is generated. The following reports contain the report template functionality: Meal Preference Tally, Resident Roster, Tray Cards, Tray Tickets, and Weight History.

Saving Report Template:

1. Click **Reports**
2. Click desired report
3. Click **Default Template**
4. Select desired filter(s), sort by option and resident(s)
5. Click **Save as New Template**
6. Enter template name
7. Click **Create New Template**

8. The next time the report is generated, select the saved template name from the list of available templates