



## Creating an Initial Milk Entry for a New Center/Site

**INITIAL NOTE: IT IS IMPORTANT TO COLLECT INFORMATION FROM THE NEW SITE BEFORE THEY SERVE THEIR FIRST MEAL THAT REQUIRES MILK ON THE FIRST DAY OF THEIR TRANSITION.**

- Contact the site(s) the afternoon before the date of transition.
- Obtain the information regarding the amount of milk currently on site (that will roll over to the new month in CenterPilot).
- If it is not possible to make the electronic entry in CenterPilot before the month starts (or the first day using CenterPilot), you may back date the initial entry and the “milk math” will correct accordingly.

CenterPilot is developed to assist centers/sites track milk amounts daily. CenterPilot tracks:

- The amount of milk **required/planned** for each meal to accommodate the number of planned/expected participants by age group (Facility Information/# Attending Meals).
- The actual amount of milk **served** according to the attendance taken at each meal.
- The amount of milk **purchased** according to the receipts entered.
- The amount of **planned, served and purchased** milk is tracked for all 3 types of milk:
  - Whole milk
  - Skim or 1% milk
  - Alternate or non-dairy milk

When a new site joins your sponsorship, you as the sponsor may need to assist the site to create an initial milk entry to begin the “milk math” process that will be reflected in the *Milk Bank*. If several sites are joining your sponsorship at once, or if you are a sponsor new to CenterPilot and are transitioning several sites, you may want to use a worksheet to collect the information from your sites and then enter it into CenterPilot. This grid serves as an example of the worksheet you may want to create (there is also one online at [www.centerpilot.com/resources](http://www.centerpilot.com/resources)):

Name of Center/Site	Date of Transition to CenterPilot	Amount of Whole Milk on Site	Amount of Skim Milk on Site	Amount of Non-Dairy Milk on Site
Ex: Test Site No. 1	4/1/2021	4.5 gallons	100 half pints	1 half gallon

Once the information has been collected from the site(s), enter it into CenterPilot as a Receipt Entry.

- Log into CenterPilot as the sponsor or the site.
- From the menu at the top, choose *Receipt/Receipt Entry*.
- On the top left, select the center/site.
- On the top left, select the claim month (in the example above, the claim month would be: *Live Claim: April / 2021*).
- Begin entering a receipt in the middle of the screen in the *Enter A Receipt* grid:
  - Enter the *Receipt Date* as the first day of the month or the date of transition to CenterPilot.
  - From the drop down to *Please Select Receipt Type*, select *Donation: Donor Name*.
  - In the blank field that appears, enter “Initial Milk Entry” or “Initial Milk Carryover.”
  - Leave all other fields blank and click on *SAVE RECEIPT*.
  - When the entered receipt appears in the *Receipts for This Claim* grid at the bottom, click on the pencil on the left to bring the receipt back into the *Enter a Receipt* grid above.
  - To the far left, click on *+ New Milk Entry* in the *Milk Entry* grid.
  - Add the entries one at a time until all milk types on site for the center are entered against this receipt. In the example above, we would enter:
    - Whole Milk: 4.5 gallons (to equal 4.5 gallons).
    - Skim or 1% Milk: 100 half pints (cups) (to equal 6.25 gallons).
    - Non-Dairy Milk – 1 half gallon (to equal .5 gallons).
    - Make as many entries as required to show the correct amounts of all milk types on site.
    - Be sure to select *+ New Milk Entry* for each separate milk entry.
    - Be sure to select the correct container size for each type of milk on site (if there is more than one size of container for a type of milk, either convert it all to gallons and use a single entry, or use multiple entries for each size of container).
  - Notice that the milk entries are now reflected in the milk columns in the *Receipts for This Claim* grid at the bottom.
  - The milk amounts are also reflected in the *Receipt Totals for This Claim* grid at the top.
- Check the Milk Bank to view the initial entry.
  - From the menu at the top, select *Meal Reports/Milk Bank*.

- Notice the initial milk entries and balances showing up in the Milk Bank (most likely they will show on a line indicating a Breakfast (BK) since a meal must be used. The milk entries will show in the *Receipted Milk* columns for each milk type and will show as “gallons.”

Your site(s) should now show accurate “milk math” going forward.

NOTE THAT EACH SITE WILL NEED TO PROCESS MILK MONTHLY ON THE LAST DAY OF THE MONTH (OR AFTER) TO CARRY OVER MILK EACH MONTH.

To create a Carry Over amount for each month:

- From the menu at the top, select *Meal Reports/Milk Bank*.
- Choose the previous month in the upper left corner.
- In the *Milk Served for Period* grid, click on *Process Milk* at the top.
- The milk balances from the last day of this month will transfer to the first entry in the same section of the current month.
- Select the current month in the upper left.
- Notice the first entry for the current month will now show as “CO” for Carry Over.