HOW TO TRANSITION TO CENTERPILOT
FROM ANOTHER SOFTWARE/WEB APPLICATION

1. Set-up a new account *Now*
   a. Even if you are currently approved by your state to use a software/web application other than CenterPilot, you should begin the process of setting up your CenterPilot account now.
      i. CenterPilot has confirmed with TDA that it is allowable to have more than one vendor at a time for a specific expense, however the vendors could not be providing services to the same sites at the same time. TDA's direction is to submit a SPWA when you select the new vendor and in the SPWA:
         1. Include the total amount projected for the expense.
         2. Outline month by month how many centers you intend to transition to the new vendor and the cost per month.
         3. Only 1 SPWA needs to be submitted for this cost.
         4. Once the SPWA is approved, add the cost for the new vendor to the budget detail.
      ii. As the new vendor costs increase and the costs of the previous vendor decrease, update the budget detail.
      iii. CenterPilot will not begin charging you monthly until sites are transitioned over (you will not be required to pay two vendors for the same site).
   b. Contact CenterPilot to pay your Initial Set-Up fee to begin the process. You may call us at 214-427-4467; email us at info@centerpilot.com; or pay online at www.centerpilot.com.
      i. Once your Initial Set-Up fee is paid, CenterPilot will contact you for information to set up your sponsor account and your site accounts.
2. Decide which sites to transition to CenterPilot first.
   a. If your current software company is charging a **percentage** of the claim monthly, consider transitioning your largest site(s) first. This will save you more money sooner.
   b. Since CenterPilot is developed to "force" sites to be compliant, consider transitioning your non-compliant sites first. This will save you time giving technical assistance freeing you up for other important functions.

c. A third option to consider is transitioning several of your more independent, compliant sites with one or two non-compliant sites. Your independent sites will bond with CenterPilot quickly allowing more time to spend with the non-compliant sites.

3. With the help of CenterPilot, develop a Transition Schedule to span two to nine months (depending on the size of your sponsorship).
    a. Notify your sites of the upcoming transition and where they fit into the schedule.
    b. Be positive and enthusiastic about the transition. Remind your sites often of the advantages of using CenterPilot and how it will enhance their programs:
        i. CenterPilot is developed to prevent claim errors that would result in disallowances so your sites may expect higher reimbursement amounts.
        ii. CenterPilot has the easiest Meal Production Records in the business which will eliminate kitchen math for the cooks/vendors and ensure they are opening the correct number of food packages for the number of estimated participants.
        iii. CenterPilot eliminates the need for the extra step of needing to enter the amount of food opened back into the software/online system.
    c. Schedule a few webinar trainings with CenterPilot and ensure your sites register to attend. CenterPilot will record the webinars and ensure you have access to the recordings to train any sites who are not able to attend. The first webinar should be scheduled about a month before sites begin transitioning to allow time for the sites to prepare for transition.
    d. Forward the CenterPilot Training for Centers/Sites document to your sites and instruct them to also utilize the Power Burst Trainings and Videos online at www.centerpilot.com.
    e. Have a plan for batch training sites that need additional assistance. Check out a training site like zoom.us which offers free online meetings.

4. After the first webinar/training session, have an email/document ready to send to the sites who will be transitioning first.
    a. Instruct/assist the sites to:
        i. Begin creating their Pre-Saved Meals.
        ii. Communicate back to the sponsor if any foods/packaging need to be added to CenterPilot.*
        iii. Create and Schedule their Pre-Saved Meal Weeks.
    b. A few weeks before the transition, instruct/assist the sites to determine who at the site will be responsible for various tasks. Forward the document attached (and online at www.centerpilot.com): *CenterPilot Task Manager for Centers.* It is important that all staff know their responsibilities and when/how to perform them so that the site remains in compliance with all CACFP regulations.

     c. A few weeks before the transition, instruct/assist the sites to download the Participant Information from the current software/web application to an Excel file.

          i. Name the document with the name of the center/site.

          ii. Forward the document to ayoung@centerpilot.com for uploading.

*Note: you as the sponsor are the first line of action when sites request new foods added. As the sponsor, we request that you:

1. Ensure the food is creditable.
2. Ensure the food and packaging is not already entered into CenterPilot (remember to search General to Specific and don't look for brand names necessarily).
3. Contact CenterPilot via email to add foods if/when appropriate:
   a. Include a legible picture (or two) of the front of the product showing:
      i. The name of the product;
      ii. The weight of the product;
      iii. The count included in the packaging if appropriate.
   b. Include a legible picture of the side of the package showing the Nutrition Facts Label.
   c. Include a legible picture of the ingredient list.
   d. Include a legible picture of the Child Nutrition (CN) label if appropriate.