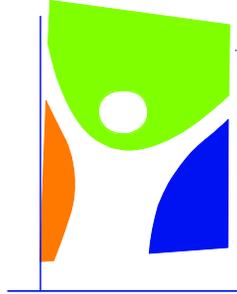


Hamilton Niagara Region

Web Tracker Instruction Guide

2023-24



Haldimand-Norfolk
REACH

supporting children, families, communities



This online monthly reporting system and data collection has been designed for local student nutrition programs and their volunteers. It is expected that this web-based system will simplify the reporting process, increase accountability and allow greater access and usability of the data by local programs and local partnerships.

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Part 1: Login

Access to the web-tracker system

Users gain access to the system server using an internet browser and going to <https://snp.webtracker.ca/Account/Login/SNP>

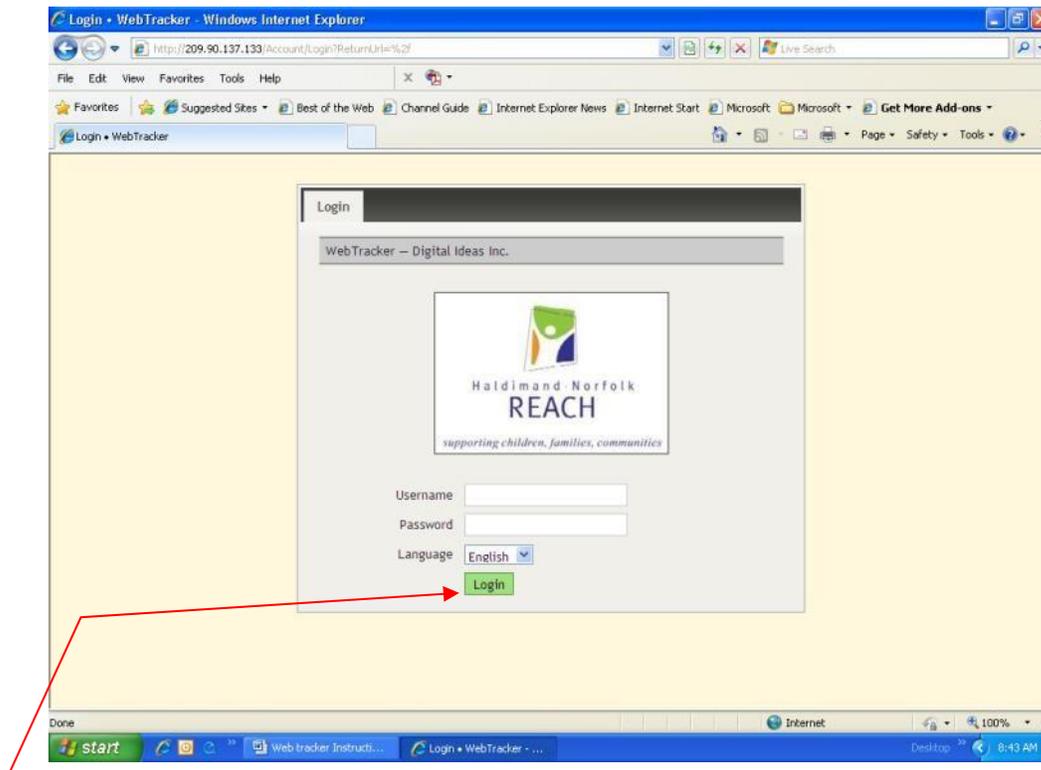
Although we recommend using Microsoft Edge as your default browser, Webtracker can now be accessed through other browsers including Firefox, Google Chrome, and Safari etc. Please keep in mind that many of these browsers will routinely update or change their security settings which may impede your access to the system. Webtracker can also be accessed using devices other than your desktop computer i.e. tablets and mobile.

Application Login

The application login is unique to each user.

User names and passwords will be given to each program by the local service provider.

Note: There is ONLY one user name and password per site



French Language Login - Select Francais to complete report in French

Part 2: Monthly Entry

Monthly Entry	Site Visits	Orders	Renewal	Statements	Client Reports	Community Programs
Month Year						Entered By
Jun 2021						
May 2021						
Apr 2021						
Mar 2021						
Feb 2021						
Jan 2021						
Dec 2020						
Nov 2020						
Oct 2020						
Sep 2020						

Each school year, the **Monthly Entry** tab will be automatically generated in order for the program coordinator to accurately track nutrition program details. Example 2023-24. The monthly reporting screen will include program name, reporting year and the reporting month.

Completion of Monthly Report

Monthly program data is required to be entered before the 1st of the following month. All sections of the monthly report must be completed by a person at your program, ideally the Program Coordinator as accuracy is important.

Section A: Days Operating and Number of Meals Prepared

Section A indicates the average number of meals / snacks prepared **each day**. E.g. for a bin program, we would ask “how many meals/snacks are put into each bin each day that the program operates?” **This count should reflect the number of complete meals/ snacks placed in each bin. (3 food groups for a meal and 2 food groups for a snack)**

Multiple programs will be reporting **on one monthly report**, as two or more programs per school site can report at once using only **one** username/password per site.

Save Save & Close
Delete Print Help Close

Program: Xavier School - TEST Reporting Period: Sep 2018

A. Days Operating and number of meals and/or snacks prepared

Program Details

Instructions: Please enter the following: the total number of days the program(s) operated; and the number of meals and/or snacks prepared for each day the program operated. For bin programs, please enter the number of meals and/or snacks that were prepared and placed in the bins each day.

	Days Operating	Meals/Snacks Prepared
Breakfast	<input type="text" value="22"/>	<input type="text" value="50"/>
Morning Meal	<input type="text"/>	<input type="text"/>
Lunch	<input type="text"/>	<input type="text"/>
Snack	<input type="text"/>	<input type="text"/>



The calendar is only visible to act as a tool to aid in counting the program days. Please refer to the school calendar for the professional activity days, school holidays and/or school closures and deduct accordingly when determining the maximum number of possible program days.

Incorrect data or missing data will be noted by a red corrections box at the top of the page.

Save Save & Close
Delete Print Help Close

- Data Entry Name is mandatory
- The value 'Nine' is not valid for BreakfastMeals.
- One of the fields has an invalid value.

Section B: Program Expenses

This section is tracking the cost of running the program. All receipt totals for food and supplies along with equipment purchases should be tallied and the dollar amount entered. Additionally, if your program is using Grocery Foundation grocery vouchers, the total value of redeemed vouchers should also be entered. A brief description is helpful in illustrating the food offered and supplies utilized.

Program food expenditures purchased using gift cards should be noted as such in the expenditure description. In addition, food purchased at a grocery retail store as well as any food purchased through WebTracker should be included here.

B. Program Expenditure

Items

Instructions: Please enter the total dollars spent for each of the following for all programs operating at this site.

	Amount	Description
Food and Supplies	365	\$265.00 in cash, \$100 in gift cards
Dollar Value of Redeemed GF Vouchers	120	
Equipment	800	One refrigerator

Monthly financial reports from the school's banking system are required to be forwarded each month to your local community development worker so they can be uploaded into the Statement section. (See section D for more details).

Grocery gift cards that are received by programs should be physically kept at the school in a locked 'cash box'. Gift cards are considered cash and as such purchases utilizing gift cards must be tracked appropriately. Many school banking systems will include software programming that will facilitate this important accountability requirement. For more information, please contact your Community Development Worker (CDW).

Please try to be as accurate as possible in noting all expenditures. Expenditures should be accurately reflected in the account statements.

Section C: In Kind Donations

In kind donations include any product, service or support that was supplied without charge. This includes volunteer time, donated food, equipment or supplies, and operational program space.

Program days recorded in Section A are brought forward and will appear light grey in this section. **Volunteers** include anyone who helped make the program possible. We are grouping all volunteers together and looking at the average volunteer time donated per day. For example; if your breakfast program runs for an average of 3 hours (including preparation and clean-up), and uses an average of 4 volunteers, you would enter the information as follows:

C. In-Kind Donations

Volunteer

Instructions: For each program in operation, please enter the average number of volunteers and average hours of support for each day the program(s) operate.

	Days	Hours per Day	Volunteers
Breakfast	<input type="text" value="22"/>	<input type="text" value="3"/>	<input type="text" value="4"/>
Morning Meal	<input type="text"/>	<input type="text"/>	<input type="text"/>
Lunch	<input type="text"/>	<input type="text"/>	<input type="text"/>
Snack	<input type="text"/>	<input type="text"/>	<input type="text"/>

Donated Items:

Any donated items you receive in your program should be assigned a value based on the purchased cost of the item. For example; if your program receives yogurt donated from Breakfast Clubs of Canada, please record in the space provided.

Example: single item donated or many items donated in one month

\$30.00

Bagels

\$250.00

Bagels (\$30.00) Bushels of apples (\$100.00) Yogurt (\$120.00)

- Donated Items

Instructions: Please enter the total dollar value and description for each of the following for all programs operating at this site.

	Amount	Description
1. Food	<input type="text" value="250.00"/>	<input type="text" value="Bagels (\$30), Apples (\$100), Yogurt (\$120)"/>
2. Equipment	<input type="text" value="700.00"/>	<input type="text" value="Donated from local business"/>
3. Egg Farmers of Canada Coupons (# of coupons redeemed)	<input type="text" value="8"/>	<input type="text" value="8 coupons redeemed"/>

*****Please note, that the Egg Farmers of Canada Coupons are recorded as the number of coupons redeemed, and NOT the dollar amount*****

Donated food items can include items donated by parents, local businesses or your local service provider. Items can include bagels, muffin mix, veggies, bushels of fruit etc.

If programs receive gift vouchers or coupons a dollar value for these should be noted.

There may be other items that programs receive on an ongoing basis from local service providers. These should be tracked consistently throughout the year. Contact your local service provider for assistance in tracking these donations.

Section D: Financial Contributions

All cash funding received from any source at the school level, should be included in this section of the monthly report. Only school level financial contributions will be required to be entered by the local program coordinator on the monthly reporting screen. The following is a reference data map for reporting monthly financial contributions at the school level in the appropriate section.

Category	Entry Inclusions
Parental	Parental cash received at school. School Cash On-Line.
Corporate	Cash funding received at the program level from corporate donors. Example; ArcelorMittal, Cobbs Bread, Union Gas, Post Cereal, SC Johnson,
Community	Cash received at the program level from local businesses, service clubs or others. Masonic, Kinsmen, Rotary, Lions Club, Local Firefighter Assoc.
Fundraising	Proceeds from fundraising at the program level. Example; Any school/program fundraising efforts: Popcorn sales, Parent Teacher Night , School fun days , Movie nights etc...
Other	

All funding that flows from the local service provider to the program will be reported by the local community development worker. This information can be accessed through the school details report under the **School Funding** tab. Examples of these funding sources include:

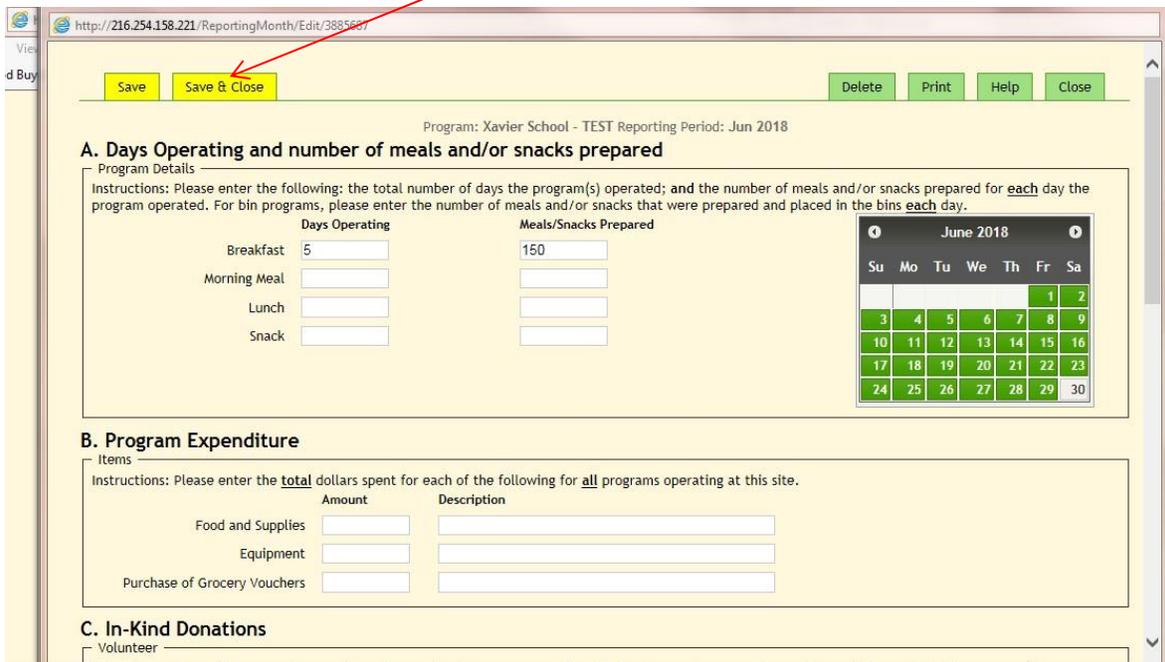
- MCCSS Food Funding
- Breakfast Club of Canada
- FirstOntario Credit Union
- Community Partnership
- Grocery Foundation Vouchers
- MCCSS Infrastructure Funds
- Egg Farmers of Ontario
- Grocery Foundation Gift Cards
- Grocery Foundation Cash funding

Section E: Sign Off Box

The final step in completing a program's monthly report is the 'entered by' box. The person(s) completing the report must complete Section E.

Saving and Closing Page

When data is entered correctly the two **Save** and **Save and Close** buttons will turn yellow. Once save button returns to **Green**, data has been saved in the system. You may also choose to print a hard copy for your files.



http://216.254.158.221/ReportingMonth/Edit/3885687

Save Save & Close Delete Print Help Close

Program: Xavier School - TEST Reporting Period: Jun 2018

A. Days Operating and number of meals and/or snacks prepared

Program Details

Instructions: Please enter the following: the total number of days the program(s) operated; and the number of meals and/or snacks prepared for **each** day the program operated. For bin programs, please enter the number of meals and/or snacks that were prepared and placed in the bins **each** day.

	Days Operating	Meals/Snacks Prepared
Breakfast	5	150
Morning Meal		
Lunch		
Snack		

June 2018

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

B. Program Expenditure

Items

Instructions: Please enter the **total** dollars spent for each of the following for **all** programs operating at this site.

	Amount	Description
Food and Supplies		
Equipment		
Purchase of Grocery Vouchers		

C. In-Kind Donations

Volunteer

Part 3: Site Visits

Site visits / assessments will be completed electronically by local community development coordinators through WebTracker, either in person or virtually. These reports can be viewed at any time by local program coordinators.

Monthly Entry Site Visits Orders Renewal Statements Client Reports Community Programs			
+	Completed Date	School Contact	Final Notes
	2018-11-12		testing new meal prepared number addition (DE)
	2017-11-22	artene	Excellent, no follow-up meeting necessary.
	2017-11-22	artene	

To strengthen and enhance the ability of local service providers to monitor programs and direct resources in the most effective and efficient manner, a site assessment rubric has been developed to allow for a standardized approach.

The six quality standards embedded in the rubric represent the provincial criteria for funding. This rubric is intended to provide a powerful tool for assessing and improving program quality by making expectations clear, and illustrating to programs how to meet these expectations and improve the quality of their programs. A rubric based site assessment tool can also describe the quality of progress on each of the identified criteria, thereby providing a richer and more multidimensional description of the programs' operations.

Within the student nutrition program site assessment rubric, the performance objectives for each quality standard have been developed into four levels of progression.

These levels are described as follows:

Beginning	Performance characteristics reflecting a beginning level of performance.
Developing	Performance characteristics reflecting development and movement toward mastery of performance.
Accomplished	Performance characteristics reflecting mastery of performance.
Exemplary	Performance characteristics reflecting the highest level of performance

Programs will be assessed on each quality standard. This assessment will assist local programs and service providers in gauging the progress on each of the identified criteria. Recommendations will be generated based on the levels of achievement on each of the six quality standards. Additional site assessments and/or other resources, tools and supports can then be mobilized to guide the effective development and delivery of local student nutrition programs.

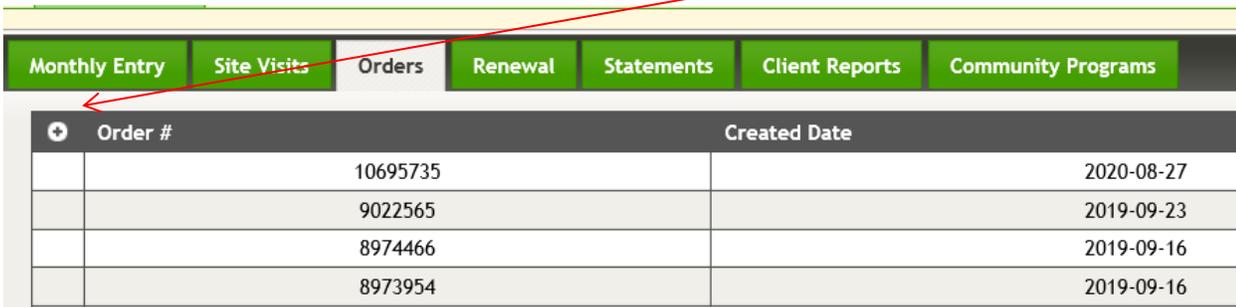
The full preamble to the revised site assessment as well as the site assessment rubric tab can be accessed by clicking on the appropriate tab in the site assessment platform.

Part 4: Orders

A vendor **Orders** tab : This portal will allow programs to submit orders on line for nutrition products from approved vendors. In accessing this tab, local programs will be able to view participating local vendors, consider products available, and review associated costs to facilitate the centralized purchase and/or delivery of products to support their student nutrition program. The regional food and logistics coordinator will manage the vendor listings, product selection and costing updates. All programs must register with a vendor / distributor. Please contact your CDW for registration forms.

CREATING AN ORDER

To access the ordering portal, programs will click on the **Orders** tab. Click the **(+)** sign to create an order.



Monthly Entry	Site Visits	Orders	Renewal	Statements	Client Reports	Community Programs
+		Order #	Created Date			
		10695735	2020-08-27			
		9022565	2019-09-23			
		8974466	2019-09-16			
		8973954	2019-09-16			

The screen will show tabs for the vendor(s) available to that program. Programs will view the product, available size(s), and costing. Users may enter the desired product and quantity and total cost of the vendor order will be tabulated. Orders can be placed weekly; standing orders are not permitted.

Specific ordering, delivery and payment instructions will be noted for each vendor. You can order from multiple vendors on one order by using the multiple vendor tabs available in your area.

Most vendors have a \$150.00 minimum order for delivery although there are exceptions (e.g. McNab Distributing (Niagara) \$120.00

A date will automatically appear in the order date box, which indicates that your order has started. Upon completion of your order, clicking **Save and Close** will place your order and you will receive a message after a few moments, to indicate that your order has been received. **Just click once!**



This finished order can now be viewed at any time

Upon placing an order, you are able to return to your existing order if any changes or updates are necessary, providing all changes are completed before 12:00pm on Wednesday. To do this, do **not** create another order#, simply find the order# that you recently placed and open it.

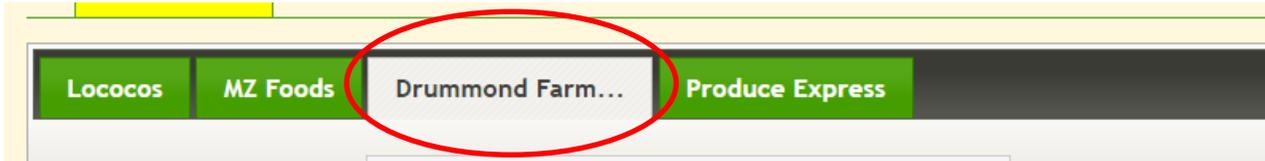
For example, if you need to return to an order# that was already created to make changes, simply find the correct order# (usually this is the most recently saved order) and open it.

Monthly Entry	Site Visits	Orders	Renewal	Statements	Client Reports	Community Programs
Order #	Created Date					
10695735	2020-08-27					
9022565	2019-09-23					
8974466	2019-09-16					
8973954	2019-09-16					

Upon making your changes, please re-save by using the **SAVE** button.



Remember, that multiple orders to different vendors are all possible through one ordering window, by clicking through each vendor tab.



Weekly reports detailing the vendor cost and product ordered will be retrieved from the system by local service providers and delivery and/or pick-up coordinated. Users will be able to view a monthly invoice detailing the vendors and products received.

If any items are going to be shorted, you or your program will be contacted on the Thursday or Friday of the order being placed.

RUNNING A PURCHASE ORDER REPORT:

Programs can access a purchase order report that will provide information on the order date, vendor, and cost in the Purchase Summary section of the **Client Reports** tab.



Part 5: Renewal

Monthly Entry	Site Visits	Orders	Renewal	Statements	Client Reports	Community Programs
Created Date			Authorization 1			
2021-05-20						
2020-06-01						

Grant Renewals occur each year in early June. The renewal is intended to summarize the records of the current school year, and indicate plans to continue the student nutrition program in the upcoming school year. Programs ***must*** complete their May data entry before they can begin the grant renewal.

The local service provider in your community will determine the timing for the grant renewal component to be open and available for completion, at which time you will be sent separate instructions to complete the renewal process.

Contact Details	Financial Information	GF Voucher	Program Menu	Support Documents	Training / Certification	Sign Off and Submit
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Part 6: Statements

Uploading financial details is a critical part of responsible financial tracking, and an effective method of ensuring that expenditures have an additional method of verification.

Month	Year	End of Month Balance	Note
Jun	2021		
May	2021		
Apr	2021		
Mar	2021		
Feb	2021		
Jan	2021		

Obtaining a PDF of the monthly financial statement school statement will allow you to upload the document and enter in the Debit, Credit, and End of Month Balance. Remember, some statements may include a number of months- make sure to report **ONLY** on the month that is being entered.

Save
Save & Close
Delete
Print
Help
Close

Statement

Debit Amount

Credit Amount

End of Month Balance

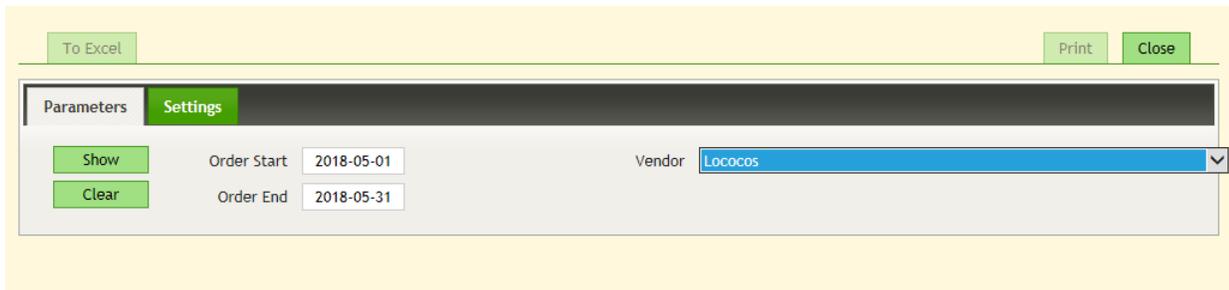
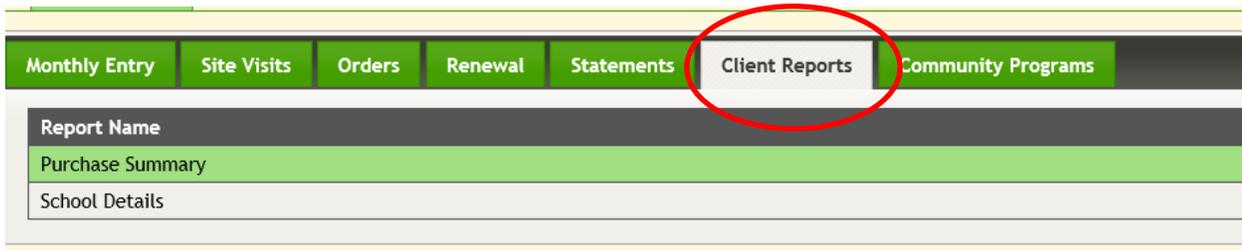
Note

File

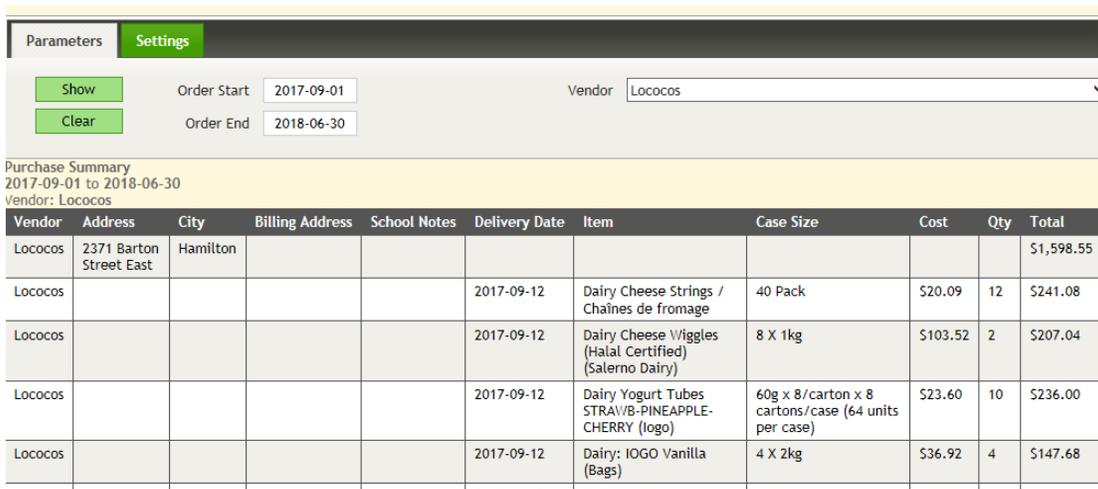
* Use this to Upload replacing the existing file

Part 7: Client Reports

The **Client Reports** tab includes two useful sections. The first section is the Purchase Summary. Here programs can view their purchases by vendor (drop down list) for a specific date range.



Once selected, each vendor purchase will be listed as a separate line and include details such as delivery date, items ordered, case sizes and cost.



Vendor	Address	City	Billing Address	School Notes	Delivery Date	Item	Case Size	Cost	Qty	Total
Lococos	2371 Barton Street East	Hamilton								\$1,598.55
Lococos					2017-09-12	Dairy Cheese Strings / Chaînes de fromage	40 Pack	\$20.09	12	\$241.08
Lococos					2017-09-12	Dairy Cheese Wiggles (Halal Certified) (Salerno Dairy)	8 X 1kg	\$103.52	2	\$207.04
Lococos					2017-09-12	Dairy Yogurt Tubes STRAWB-PINEAPPLE-CHERRY (logo)	60g x 8/carton x 8 cartons/case (64 units per case)	\$23.60	10	\$236.00
Lococos					2017-09-12	Dairy: IOGO Vanilla (Bags)	4 X 2kg	\$36.92	4	\$147.68

The second section is School Details and will include general School Information and contact details. If any information here is incorrect, please contact your CDW to ensure corrections are made.

Program details indicate the type of program(s) for which your school has received funding, delivery method, number of operating days, and funding details.

Funding Detail summarizes the available funding that has been sent to your program by school year, quarter, and by funder. As funding from national funders and provincial funders is distributed by your service provider, it is tallied automatically and will remain up to date.

Print Help Close

School Information				
Program Name	Xavier School - TEST	Primary Contact	update if needed with name and email address	
School Enrolment	333	email	dedmonds@hnreach.on.ca	
Address	55 Fifth Street S	Phone	(905) 522-1148	
R.R. or P.O.		Fax		
City / Town	Smallville	Other Phone		
Province	ON	Grade	Elementary	

Program			
Breakfast	Grab and Go	Days / Week	5
Morning Meal		Days / Week	
Lunch	Sit Down	Days / Week	2
Snack		Days / Week	

Funding Detail				
Year	Period	Funder	Amount	Note
2018 - 2019	Q2: July - September	MCYS Food Funds	2500	
2018 - 2019	Q1: April - June	Breakfast Club of Canada	1000	
2018 - 2019	Q1: April - June	Breakfast Club of Canada	250	Arlene - Testing

The Ministry of Education website will provide updated school information details including official School Name, School ID, student enrollment, address and contact details. However, the student enrollment is not updated immediately, and is best gathered at the school level.

School ID



William Hamilton Merritt Public School (510530)

Address: 114 Linwell Rd, St Catharines, Ontario, L2N6N8

Phone Number: 905-937-0510

Fax Number: 905-937-8845

Enrolment 2018-2019 (Preliminary): 270

Grades Available: JK-8

School Website (if available): [William Hamilton Merritt Public School](#)

Board Name: DSB Niagara (B66150)

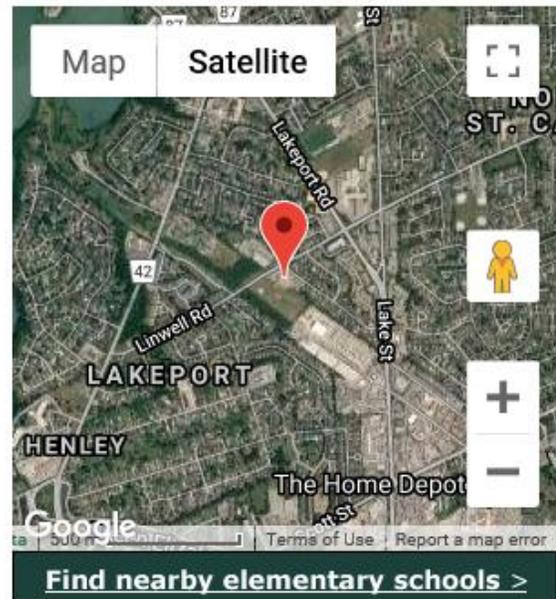
Board Website: <http://www.dsbni.edu.on.ca>

[Start a new search](#)

What you can find:

- [Grade 3 Student Achievement](#)
- [Grade 6 Student Achievement](#)
- [Student Population](#)
- [Class Sizes](#)

Click on any term below to view a [glossary](#). Data is



Part 8: Troubleshooting

OPERATIONAL REQUIREMENTS-

Although we recommend using Microsoft Edge as your internet browser, Webtracker can now be accessed through other browsers including Firefox, Google Chrome, and Safari etc. Please keep in mind that many of these browsers will routinely update or change their security settings which may impede your access to the system. Webtracker can also be accessed using devices other than your desktop computer i.e. tablets and mobile.

Users gain access to the web-tracker server (Digital Ideas) at

<https://snp.webtracker.ca/Account/Login/SNP>

Dial up or internet light operating systems may result in slower access to the Digital Ideas server.

The application login is unique to each user and is developed by the Lead Agency and forwarded to all programs by each local service provider.

Tip: User names and passwords are case and space sensitive

DATA ENTRY (Monthly Entry tab)

Data must be entered in **all** sections: Sections A and C of the Monthly Entry tab are directly linked together. Section A includes the number of operating program days each month and the number of meals prepared **each day**. For example if your breakfast program operated for 5 days in the month and prepared 25 meals for students each operating day, enter '5' in box for number of program days and '25' in box for number of meals prepared. (e.g. 25 meals prepared per day x 5 days = 125 meals prepared)

The number of meals prepared for the entire month is automatically calculated behind the scenes and recorded in the database.

In Section C; number of volunteers and hours recorded are **per day**.

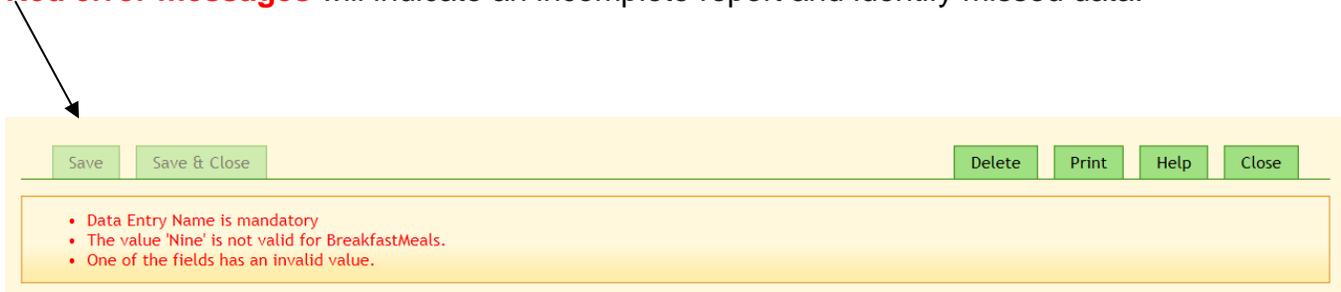
Tip: When data is entered, the **Save** and **Save and Close** buttons will turn yellow. To save data, click either button. Once the save button returns to green, data has been successfully saved in the system. If a report is slow to save, close out any open programs or applications on your computer.

SYSTEM FEATURES

Data can only be entered for current school year. Reporting months are created for you at the beginning of a new school year. Data from previous months and years can be selected and viewed.

Tip: Changing your printer's settings based on the size of your monitor may be necessary to properly print reports. Go to file and page setup to set your margins to 0.

Red error messages will indicate an incomplete report and identify missed data.



Tip: Certain data fields are mandatory. For example you must enter the number of students served and number of program days. The sign off box at the bottom is also mandatory.

If your data is not saving please contact your local community development worker and they will attempt to enter data. If they note that the system appears to be working, you may try accessing WebTracker on a different computer to complete your report. Internet browsers and software providers like Microsoft routinely complete software upgrades which impact computer operation. If you require technical assistance, please contact your local community development worker or service provider.

You may also contact Haldimand –Norfolk REACH WebTracker administrators at 1-800-265-8087 and speak with either Tyler Arsenault, Regional Student Nutrition Program Manager at ext. 408; tarsenault@hnreach.on.ca, or Darlene Edmonds, Regional Community Development Coordinator / Food and Logistics Coordinator at ext. 321; dedmonds@hnreach.on.ca