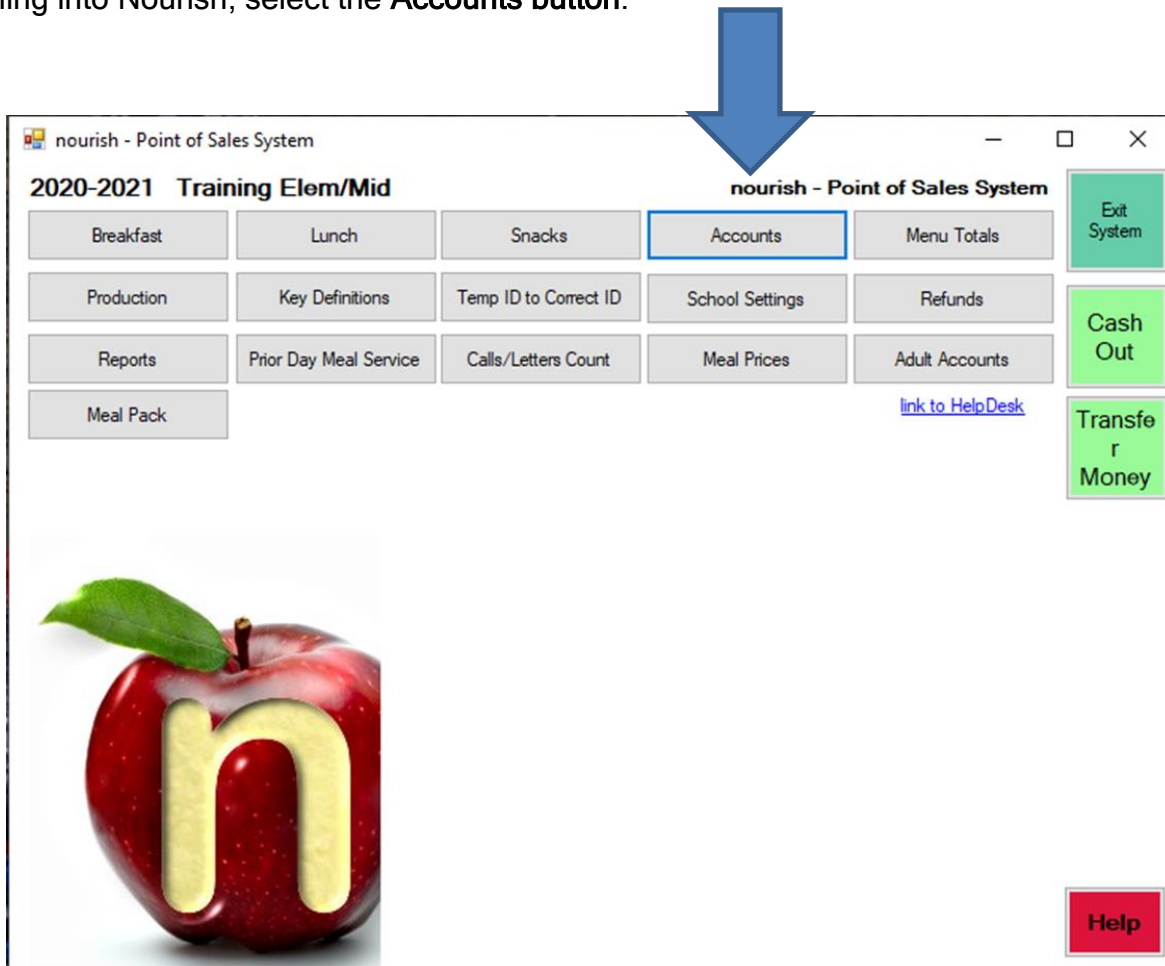


## Accounts Form

The **Accounts** button allows a record to be updated or a new account created. Existing accounts can have Notes and/or Allergy Notes added, edited or removed.

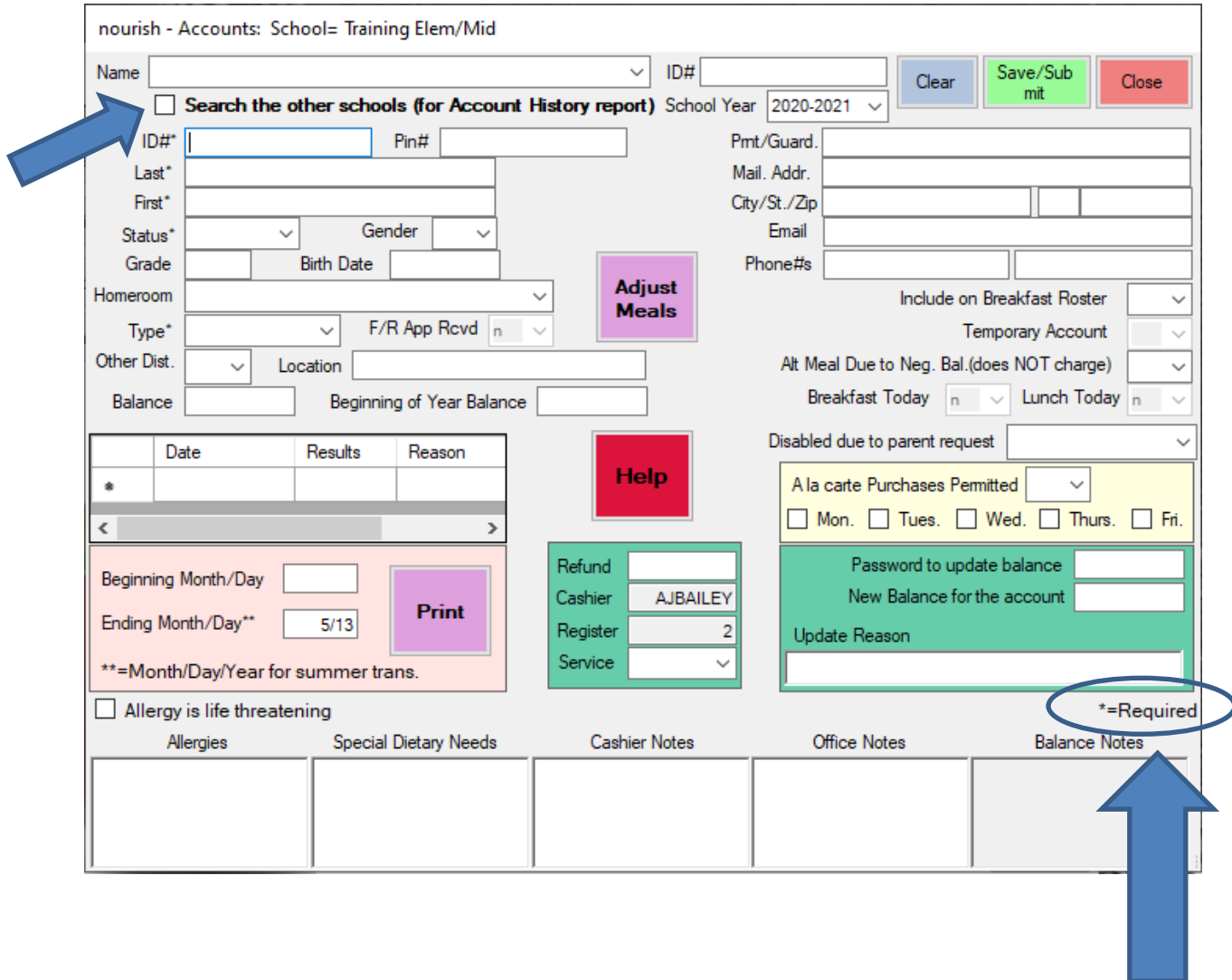
After signing into Nourish, select the **Accounts** button.



## Accounts Form

The **Accounts** form opens blank. The account **Name** must be selected to begin using the form. Click the dropdown arrow and begin typing the name to see a list of accounts. Select the account from the list to populate the fields.

If there is a question about a student in another building, you can use the checkbox below “**Name**” to look up that students’ history.



nourish - Accounts: School= Training Elem/Mid

Name  ID#

☐ Search the other schools (for Account History report) School Year 2020-2021

ID#\*  Pin#

Last\*

First\*

Status\*  Gender

Grade  Birth Date

Homeroom

Type\*  F/R App Rcvd

Other Dist.  Location

Balance  Beginning of Year Balance

Pmt/Guard.

Mail. Addr.

City/St./Zip

Email

Phone#s

Include on Breakfast Roster

Temporary Account

Alt Meal Due to Neg. Bal.(does NOT charge)

Breakfast Today  Lunch Today

Disabled due to parent request

A la carte Purchases Permitted

☐ Mon. ☐ Tues. ☐ Wed. ☐ Thurs. ☐ Fri.

Refund

Cashier AJBAILEY

Register 2

Service

Beginning Month/Day

Ending Month/Day\*\*  5/13

\*\*=Month/Day/Year for summer trans.

☐ Allergy is life threatening

Allergies Special Dietary Needs Cashier Notes Office Notes Balance Notes

\*=Required

**\*\*Required Information fields are indicated by an \* and must be filled in before saving when creating a new account.**

## Accounts Form

Notes are added to the student record from this screen.

- **Allergies:** displays on the ID Form and Roster Form to alert cashier when the account is selected.
- **Special Dietary Needs:** Example: Needs lactose milk, Gluten free diet, no pork (culture), etc.
- **Cashier Notes:** displays on the ID Form and Roster Forms to alert cashier when the account is selected.
- **Office Notes:** are notes on the account that the cashier does not need to see but can be seen by the office staff.
- **Balance Notes:** are generated when an account balance has been updated.

nourish - Accounts: School= Training Elem/Mid

Name  ID#

☐ Search the other schools (for Account History report) School Year 2020-2021

ID#\*  Pin#

Last\*

First\*

Status\*  Gender

Grade  Birth Date

Homeroom

Type\*  F/R App Rcvd

Other Dist.  Location

Balance  Beginning of Year Balance

Pmt./Guard.

Mail. Addr.

City/St./Zip

Email

Phone#s

Include on Breakfast Roster

Temporary Account

Alt Meal Due to Neg. Bal.(does NOT charge)

Breakfast Today  Lunch Today

Disabled due to parent request

A la carte Purchases Permitted

☐ Mon. ☐ Tues. ☐ Wed. ☐ Thurs. ☐ Fri.

Refund

Cashier  AJBAILEY

Register  2

Service

Beginning Month/Day

Ending Month/Day\*\*  5/13

\*\*=Month/Day/Year for summer trans.

☐ Allergy is life threatening

☐ Required

Allergies Special Dietary Needs Cashier Notes Office Notes Balance Notes

## Accounts Form

**Breakfast Today:** indicates if a breakfast meal has been purchased today.

**Lunch Today:** indicates lunch meal has been purchased today.

nourish - Accounts: School= Training Elem/Mid

Name  ID#  Clear Save/Sub mit Close

☐ Search the other schools (for Account History report) School Year 2020-2021

ID#\*  Pin#

Last\*

First\*

Status\*  Gender

Grade  Birth Date

Homeroom

Type\*  F/R App Rcvd

Other Dist.  Location

Balance  Beginning of Year Balance

**Adjust Meals**

Pmt/Guard.

Mail. Addr.

City/St./Zip

Email

Phone#s

Include Breakfast Roster

Temporary Account

Alt Meal Due to Neg. Bal.(does NOT charge)

**Breakfast Today**  **Lunch Today**

Disabled due to parent request

A la carte Purchases Permitted

☐ Mon. ☐ Tues. ☐ Wed. ☐ Thurs. ☐ Fri.

Password to update balance

New Balance for the account

Update Reason

☐ Allergy is life threatening

Allergies Special Dietary Needs Cashier Notes Office Notes Balance Notes

Beginning Month/Day

Ending Month/Day\*\*  5/13 **Print**

\*\*=Month/Day/Year for summer trans.

Refund

Cashier AJBAILEY

Register  2

Service

**Help**

\*=Required

The **Adjust Meals** button is used to reimburse students who were charged for meals while their NourishFar application was delayed in processing.

## Accounts Form

Additional account options can be set using the Accounts form:

- **Include on Breakfast Roster:** this is a yes/no option
- **Temporary Account:** this is a yes/no option. Temporary student accounts can be merged with student accounts using the Temp ID to Student # button from the Nourish main menu.
- **Alt Meal Due to Negative Balance:** this is a yes/no option
- **A la carte Purchases Permitted:** this is a yes/no option

nourish - Accounts: School= Training Elem/Mid

Name  ID#  Clear Save/Sub mit Close

☐ Search the other schools (for Account History report) School Year 2020-2021

ID#  Pin#

Last\*

First\*

Status\*  Gender

Grade  Birth Date

Homeroom

Type\*  F/R App Rcvd

Other Dist.  Location

Balance  Beginning of Year Balance

**Adjust**

**Temp**

Pmt/Guard.

Mail. Addr.

City/St./Zip

Email

Phone#s

Include on Breakfast Roster

Temporary Account

Alt Meal Due to Neg. Bal.(does NOT charge)

Breakfast Today  Lunch Today

Disabled due to parent request

A la carte Purchases Permitted

☐ Mon. ☐ Tues. ☐ Wed. ☐ Thurs. ☐ Fri.

Refund

Cashier AJBAILEY

Register 2

Service

Beginning Month/Day

Ending Month/Day\*\* 5/13 Print

\*\*=Month/Day/Year for summer trans.

☐ Allergy is life threatening

Allergies Special Dietary Needs Cashier Notes Office Notes Balance Notes

\*=Required

## Accounts Form

Existing student accounts will have additional information on the Accounts form.

**Homeroom** - student homeroom teacher

**Type** - Paid, Free, Reduced or Adult

**F/R Application Received** - Yes / No

**Other District** - Student is not in the district, setting this flag indicates not to disable the account with the nightly student update

**Location** - optional field for not in district students

**Disabled Due to Negative Balance** - accounts can be disabled due to negative balances

**Disabled Count** - number of times the account has been disabled

**Balance** - current balance for this student

**Beginning of Year Balance** - balance the student began with at the start of the school year

nourish - Accounts: School= Training Elem/Mid

Name  ID#

☐ Search the other schools (for Account History report) School Year 2020-2021

ID#  Pin#

Last\*

First\*

Status\*  Gender

Grade  Birth Date

Homeroom

Type\*  F/R App Rcvd

Other Dist.  Location

Balance  Beginning of Year Balance

Pmt/Guard.

Mail. Addr.

City/St./Zip

Email

Phone#s

Include on Breakfast Roster

Temporary Account

Alt Meal Due to Neg. Bal.(does NOT charge)

Breakfast Today  Lunch Today

Disabled due to parent request

A la carte Purchases Permitted

☐ Mon. ☐ Tues. ☐ Wed. ☐ Thurs. ☐ Fri.

Password to update balance

New Balance for the account

Update Reason

☐ Allergy is life threatening

Allergies Special Dietary Needs Cashier Notes Office Notes Balance Notes

Refund

Cashier AJBAILEY

Register 2

Service

\*\*=Month/Day/Year for summer trans.

\*=Required

Free and Reduced account history is displayed in the middle of the left side of the accounts window for this student.

**\*\*This box will only appear for students who have a NourishFar application submitted\*\***

## Accounts Form

When all options have been filled in, select the **Save/Submit** button to save changes.

nourish - Accounts: School= Training Elem/Mid

Name  ID#

☐ Search the other schools (for Account History report) School Year 2020-2021

ID#\*  Pin#

Last\*

First\*

Status\*  Gender

Grade  Birth Date

Homeroom

Type\*  F/R App Rcvd

Other Dist.  Location

Balance  Beginning of Year Balance

Pmt/Guard.

Mail. Addr.

City/St./Zip

Email

Phone#s

Include on Breakfast Roster

Temporary Account

Alt Meal Due to Neg. Bal.(does NOT charge)

Breakfast Today  Lunch Today

Disabled due to parent request

A la carte Purchases Permitted

☐ Mon. ☐ Tues. ☐ Wed. ☐ Thurs. ☐ Fri.

Beginning Month/Day

Ending Month/Day\*\*  5/13

\*\*=Month/Day/Year for summer trans.

☐ Allergy is life threatening

Allergies  Special Dietary Needs

Cashier Notes

Office Notes

Balance Notes

Refund

Cashier  AJBAILEY

Register  2

Service

Password to update balance

New Balance for the account

Update Reason

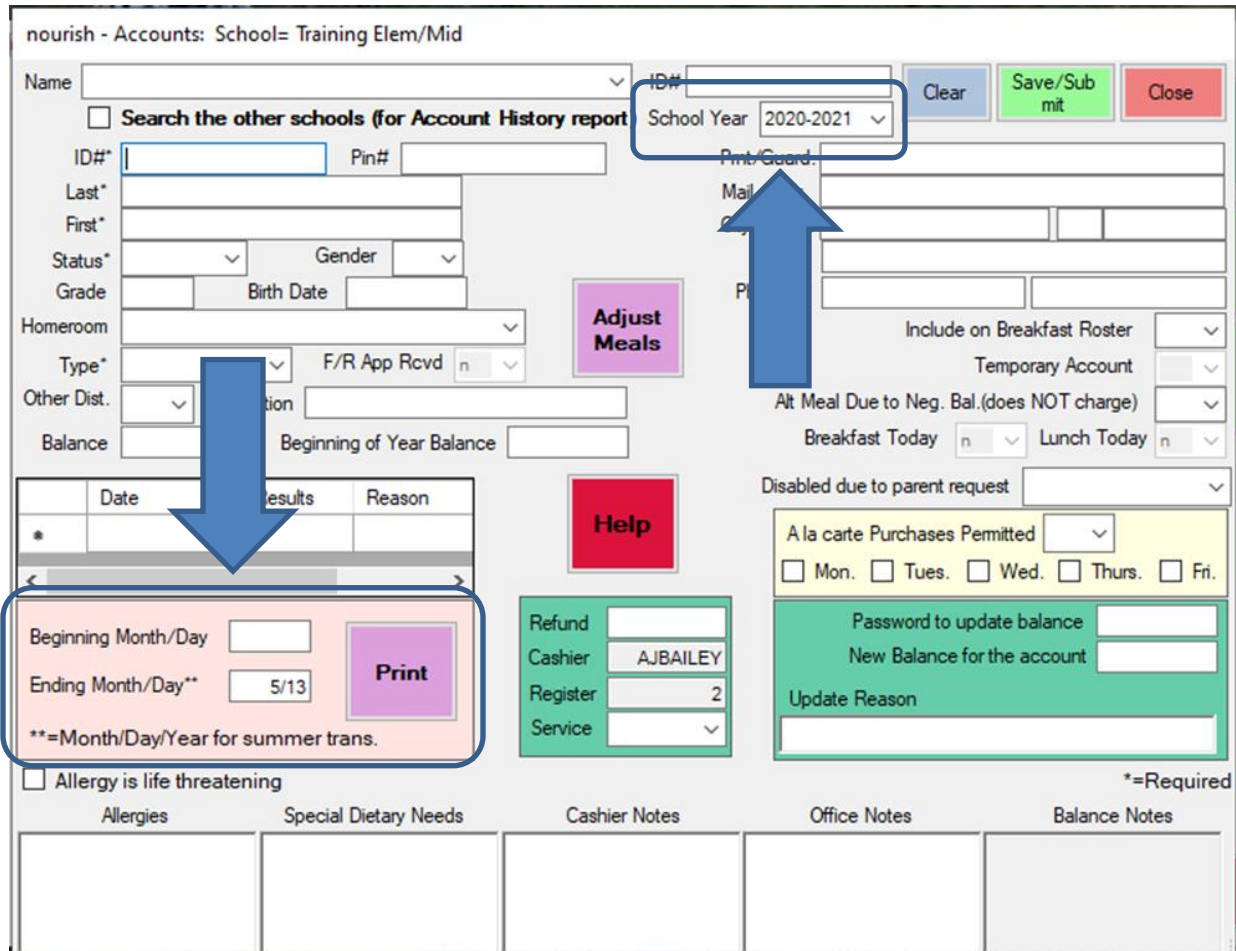
\*=Required

A save confirmation window will appear, select **OK** to continue. Enter a new student name or select **Close** to close the accounts form.

Account Saved

## Accounts Form

To get an account history report for a student, use the **School Year** dropdown at the top center and use the window near the bottom left hand corner of the Accounts Form window. Enter a **Beginning Month/Day**, the **Ending Month/Day** is pre-filled with today's date. Select **Print** to open the report window.



nourish - Accounts: School= Training Elem/Mid

Name  ID#

☐ Search the other schools (for Account History report) School Year 2020-2021

ID#  Pin#  Print Guard

Last\*  Mail

First\*

Status\*  Gender

Grade  Birth Date

Homeroom

Type\*  F/R App Rcvd

Other Dist.  Location

Balance  Beginning of Year Balance

Beginning Month/Day

Ending Month/Day\*\* 5/13

\*\*=Month/Day/Year for summer trans.

☐ Allergy is life threatening

Allergies Special Dietary Needs Cashier Notes Office Notes Balance Notes

Refund

Cashier AJBAILEY

Register 2

Service

Include on Breakfast Roster

Temporary Account

Alt Meal Due to Neg. Bal.(does NOT charge)

Breakfast Today  Lunch Today

Disabled due to parent request

A la carte Purchases Permitted

☐ Mon. ☐ Tues. ☐ Wed. ☐ Thurs. ☐ Fri.

Password to update balance

New Balance for the account

Update Reason

\*=Required

Print the Account History Report and/or close the window when finished.

