

Complete Desk Reviews

Last Modified on 12/21/2022 10:59 am
CST

As the COVID-19 pandemic continues to escalate, some states may begin allowing sponsors to complete desk reviews in lieu of on-site reviews. A desk review is essentially a review done remotely while on-site reviews are temporarily suspended to prevent the spread of COVID-19. It is essential that you check with your state for guidance regarding reviews during the COVID-19 pandemic. Follow all regulations and guidance provided by your state.

Note: As of **March 27, 2020**, the FNS has issued waivers for Monitoring requirements in light of the COVID-19 pandemic. This waiver has been extended through September 30, 2021. [Read the full extension memo here.](#)

In this article:

- [General Tips](#)
- [Online Desk Reviews](#)
- [Manual Reviews](#)

General Tips

The following are useful tips for managing desk reviews for your providers:

- **Create a checklist:** Create a checklist of all required documentation, if you do not have one already. This will help your Monitors ensure that all documentation has been received from providers.
- **Communicate deadlines clearly:** Request documentation from providers early enough to allow them to gather and send such documentation to you. If your providers use KidKare, you and the provider both should be able to pull electronic records. The State may set a deadline from notification to documentation delivery, such as seven (7) days. Ensure your providers submit their documentation by said deadline.
- **Use online tools:** Use online tools, such as Google Drive or Dropbox, to share necessary documentation with staff while working from home. You can also store training on such platforms and send links to providers who require it.
- **Video Calls:** Use software to video call providers. Such software includes Skype, Google Duo, Zoom, Microsoft Teams, and so on.

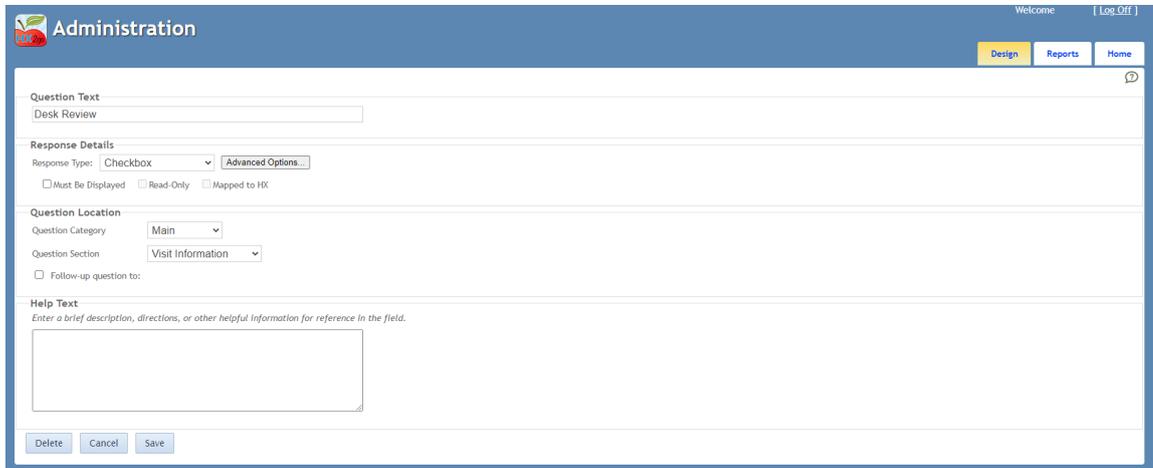
Online Desk Reviews

You can adjust the review questionnaire and implement a few new practices to complete reviews in the KidKare Review Tool. This requires a few steps to set up in Minute Menu HX.

Prepare for Online Desk Reviews

to access Minute Menu HX.

- b. Click the **Design** tab.
- c. In the **Visit Information** section, click **+**. The question details open.
- d. Click the **Question Text** box and enter something like **Desk Review** or **Is this a desk review?**
- e. Click the **Response Type** drop-down menu and select **Checkbox**.

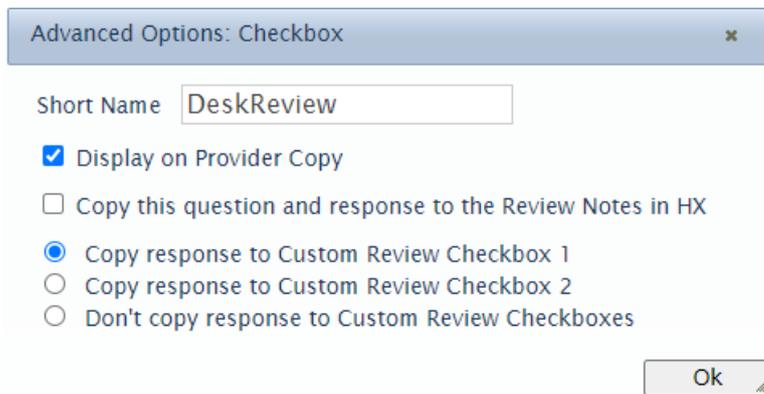


The screenshot shows the 'Administration' interface with a 'Design' tab selected. The form contains the following fields:

- Question Text:** A text box containing 'Desk Review'.
- Response Details:** A dropdown menu set to 'Checkbox' with an 'Advanced Options...' link. Below it are three checkboxes: 'Must Be Displayed', 'Read-Only', and 'Mapped to HX'.
- Question Location:** A dropdown menu set to 'Main' and another set to 'Visit Information'. Below them is a checkbox for 'Follow-up question to:'.
- Help Text:** A text area with the placeholder text 'Enter a brief description, directions, or other helpful information for reference in the field.'

At the bottom of the form are 'Delete', 'Cancel', and 'Save' buttons.

- f. Click **Advanced Options**.
- g. Click the **Short Name** box and type **DeskReview**.
- h. Select one of the following options, according to how you set your preferences in **Step 1** (First Custom Checkbox or Second Custom Checkbox).
 - Copy Response to Custom Review Checkbox 1
 - Copy Response to Custom Review Checkbox 2
- i. Click **OK**.



The dialog box is titled 'Advanced Options: Checkbox' and contains the following options:

- Short Name:** A text box containing 'DeskReview'.
- Display on Provider Copy**
- Copy this question and response to the Review Notes in HX**
- Copy response to Custom Review Checkbox 1**
- Copy response to Custom Review Checkbox 2**
- Don't copy response to Custom Review Checkboxes**

An 'Ok' button is located at the bottom right of the dialog box.

- j. Click **Save**.

Since you mapped the Desk Review question to the custom review field you created, the custom checkbox will be checked in the Provider Reviews Other tab in Minute Menu HX if it was checked on the review. You can also include the custom checkbox in the Review List Export. This allows you to easily determine which reviews were completed as Desk Reviews.

Record Online Desk Reviews

Record desk reviews in the KidKare Review Tool as you normally would. However, we recommend you also implement the following best practices:

1. The Monitor can sign **Desk Audit** in the **Provider Signature** box.
2. Ensure that the provider's email address is entered and correct so the system can email a copy of the Review report to the provider.
3. Once the review is complete, have the provider forward the Review report to you and include an acknowledgement that they have received the report and the information contained therein is correct. Be clear with your providers that they must forward it to the email address you provide, as replying to the report notification (instead of forwarding it) will reply to the KidKare Support team.

Manual Reviews

Enter manual reviews as you normally would. However, we also recommend you set up a Desk Review custom checkbox as you would for online reviews. This allows you to easily track which manual reviews were completed as desk reviews.

1. Click the **Administration** menu and select **Sponsor Preferences**. The Sponsor Preferences window opens.
2. Click the **Select a Category to Move To** drop-down menu and select **R. Review Settings**.
3. Scroll to **preference r.028** and **r.028b** or to **r.029** and **r.029b**. The one you use depends on if you're already using one of the custom fields.
4. Check the **r.028** box or the **r.029** box.
5. Click the **Select Setting** drop-down menu and select **Y**.
6. Click **Save**.
7. Next, check the **r.028b** box or the **r.029** box.
8. Click the **Enter Text Setting** box and type **Desk Review**.

Sponsor Preferences

Select the Category to move to: Select the Error to move to:

Select State: Click the Checkbox next to a policy to change it's setting. Click the Description row to see the entire description.

Policy Settings for TX. Policies with * have multiple state settings.

<input type="checkbox"/>	028. Use First Custom Checkbox*	Current Setting: Y
Do you want to enable a custom field, stored as a Y/N checkbox? It's saved on the Review record, and can be reported via th		
<input checked="" type="checkbox"/>	028b. First Custom Checkbox Name*	Current Setting: Desk Review
If you Use First Custom Checkbox, what do you want to call that field?		
<input type="checkbox"/>	029. Use Second Custom Checkbox*	Current Setting: Y
Do you want to enable a custom field, stored as a Y/N checkbox? It's saved on the Review record, and can be reported via th		
<input type="checkbox"/>	029b. Second Custom Checkbox Name*	Current Setting: Was The Exp date on the Enrollment form Checked?
If you Use Second Custom Checkbox, what do you want to call that field?		

WARNING: Changing systems settings can have far reaching consequences. If you change something improperly, claims may be improperly paid. If you are at all unsure about making a change, please contact Minute Menu support **BEFORE** you make changes.

Enter Text Setting:

Uncheck the Policy or click Cancel to de-select your choice.

9. Click **Save**.

Note: If you operate in multiple states, you must adjust these preferences for each state in which you operate. Use the **Select State** drop-down menu to switch states and then repeat **Steps 1.a - 1.i**.

When you enter the review, this checkbox displays in the Provider Reviews Other tab. Check it to indicate that this was a desk review. You can also include the custom checkbox in the Review List Export. This allows you to easily determine which reviews were completed as Desk Reviews.

The screenshot shows a software window titled "Add New Review" with a close button in the top right corner. The window header displays "Cordova, Anna 001239 Review Date: 08/12/2020 Meal: Breakfast". Below the header are four tabs: "General", "Meal", "Disallow", and "Other". The "Other" tab is active and contains the following elements:

- A list of checkboxes under "General":
 - Nutrition Info Left
 - Eligibility Changed
 - Can Claim Own Children
 - Special Diet Statement
 - New Address
 - Helper Present
 - Civil Rights Review Complete
 - Building For the Future
 - Voucher/Subsidy Children Present
 - Corrective Action
 - Whole Grains Served Daily
- A section titled "Left 4 Month Supply of:" with checkboxes:
 - Regular Menus
 - Infant Menus
 - Enrollment Forms
 - Other Forms
- Counters for "Day Care Child Count", "Own Child Count", "Own Child Eligible Count", and "Own Child Ineligible Count", all set to 0.
- A "Comments:" text area with a note "(Not printed on Sponsor Review Worksheet)".
- Checkboxes for "Block Claim Visit" and "Block Claim Validated", both unchecked.
- Fields for "Date of Last Training on File" (dropdown), "Block Claim Reason" (dropdown), "Provider Tier" (dropdown), and "Provider Tier Reason" (dropdown).
- A checkbox for "Provider Mixed Tier Determined by Parent's Income Eligibility" which is unchecked.
- A checkbox for "Desk Review" which is checked and highlighted with a blue box.
- A checkbox for "Was The Exp date on the Enrollment form Checked?" which is unchecked.
- Two "Custom Date" fields (dropdowns) for "Custom Date 1" and "Custom Date 2".

At the bottom of the window are four buttons: "Add Another", "Disallow Calendar", "Save", and "Close".