Agency UNC Activity Status by Group

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Purpose of this document

This document explains how to set up Ceres 4 to establish the UNC Activity Status for a group of Agencies at once using a batch update. Particularly focused on deactivating based on payment issues or other issues unrelated to compliance reporting.

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Purpose

Each Agency record in Ceres has an assigned UNC Activity Status that controls whether the Agency can Order product from the food bank, either in Ceres or Agency Express 3. In earlier releases, the Activity Status would need to be set Agency by Agency. This new functionality allows the food bank to update groups of Agencies at once. This functionality is particularly focused on deactivation for non-payment or other violations other than reporting non-compliance. There is a parallel process to handle non-compliance due to reporting requirements.

Ceres Object release 4.00.00 is required for the functionality described in this document.

Description of the Changes

Ceres added two distinct new functions regarding the setting of the UNC Activity status for Agencies. The first involves filtering a group of Agencies based on a set of statuses on demand (FBC Agency Code, Agency Posting Group, current UNC Activity Status). As an example, the food bank may want to update all school based agencies to Inactive at the beginning of summer and then reactivate them at the beginning of the school year.

The second feature involves the ability to automatically change Agencies status based on their compliance with the requirements as established in the Agency Compliance functionality. The current statuses are:

- Active
- InactiveAG
- InactiveFB
- PastDue
- Suspended

In previous version of Ceres, the capability existed to turn Agencies on/off based on reporting compliance (when utilizing the Agency Survey capability). This capability is now expanded to encompass past due accounts. Because Agencies may be assigned as Inactive for various reasons, any changes made to the agency status by this automatic compliance update process may optionally be logged with the date and a comment on the Agency Comments tables. See *Agency Compliance Document* for related information.

Agency Receivables and Setup

1. The Agency Receivables and Setup Page can be accessed from Departments → Agencies & Receivables → Administration → Setup → Agencies & Receivables.

2. Click on Agencies & Receivables and the Agencies & Receivables Setup Page opens as shown below.

Agencies & Receivables Setup

General	⌄
Dimensions	⌄
Numbering	⌄
Web Ordering	⌄
Web E-mail	⌄
Leased Storage	⌄
Agency Compliance	⌃

In Compliance Status:	ACTIVE ▾	Multiple Violations:	HOLDMULT ▾
Past Due Status:	HOLDFN ▾	Compliance Comments:	☑
Reporting Violation:	HOLDMAR ▾	Compliance Comment Code:	COMP ▾

3. The Agency Compliance FastTab has four fields which are validated in the UNC Activity Status table allowing each food bank to specify the correct UNC Activity Statuses they wish to use for each category of agency compliance. They are:

    a. **In Compliance Status**: this will be the value the agency's UNC Activity Status will be set to if they are in full compliance with all reporting requirements and are not considered past due

    b. **Past Due Status**: this will be the value the agency's UNC Activity Status will be set to if they are in a past due condition but have met all reporting requirements

    c. **Reporting Violation**: this will be the value the agency's UNC Activity Status will be set to if they are not considered past due but have one or more reporting requirements that have not been met

    d. **Multiple Violations**: this will be the value the agency's UNC Activity Status will be set to if they are both past due and have one or more reporting requirements that have not been met

Payment Terms

1. Ceres expanded the Payment Terms table allowing the food bank to build in grace periods for each payment term code. To access the "Grace Period" field go to Departments → Financial Management → Administration → Receivables → Setup .

2. Click on Payment Terms and the Payment Terms page opens as shown below

3. The "Grace Period" column is used to calculate the additional time Agencies will be given beyond their normal invoice terms when considering them past due for the purpose of this status utility.

   For example, the Agency may have terms of Net 30 Days and the invoice due date calculation field will contain "30D". However, the food bank may enter another value such as "15D" in the grace period field to allow the agency an additional 15 days before they will be considered past due and turned inactive by this process.

Exclude from Compliance

1. Ceres added a Boolean field "Exclude from Compliance" to the Agency Card allowing users to specify agencies exempt from the process – useful for internal food bank Agencies and to exclude other FA food banks. This field may be found on the "Information" FastTab as shown below.

Compliance Comments

1. Ceres added a Boolean field "Compliance Comments". To access the "Compliance Comment" field go to Departments → Agencies & Receivables → Administration → Setup → Agencies & Receivables Setup.

2. Click on Agencies & Receivables Setup and the Agencies & Receivables Setup page opens as shown below:
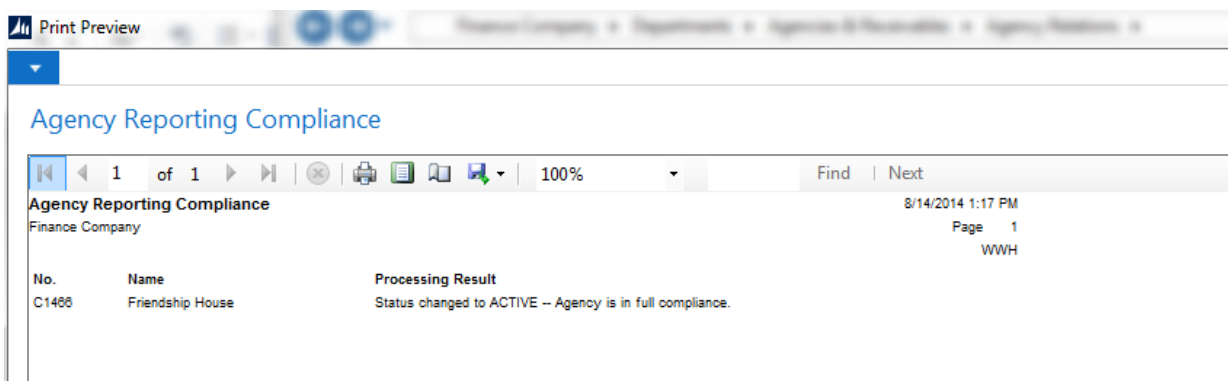

3. The "Compliance Comments" field when checked will determine whether or not activity status changes made by the utility are automatically written to the Agency's comments utilizing the Compliance Comment Code specified.

Workflow

1. The UNC Activity Status by Group workflow is independent of the Process that occurs when you run the *Agency Compliance batch update Report* (see Agency Compliance Procedure). You would either run this process **or** the Compliance Batch report defined in the other procedure. The UNC Activity Status by Group workflow is as follows:

   a. The user will initiate the process on demand to calculate the Agency's status.

   b. All Agencies not excluded from this process (indicated by the field "Exclude from Compliance" on the Agency Card will be checked

   c. The Agency's reporting status will be checked in accordance with the rules defined by the "Agency Compliance" functionality in base Ceres. Please refer to Agency Compliance documentation for more information on setting up the reporting rules for Agencies.

   d. The appropriate UNC Activity Status will be selected from the four defined statuses on the Agency & Receivables Setup. The Agency's UNC Activity Status will be set accordingly and the record of the change will be printed on the report indicating the change in status. Only Agencies whose status is changed by the process will print on the report

   e. If the "Compliance Comments" field on the Agency & Receivables Setup is checked, Ceres will create a comment record on the Agency record indicating the date and reason for the status change. Messages similar to the following will be added to the Agency's comments where XXXXX represents the status the agency was changed to:

      i. Status changed to XXXXX – Agency in full compliance.
      ii. Status changed to XXXXX – Agency is past due.
      iii. Status changed to XXXXX – Agency has reporting violations
      iv. Status changed to XXXXX – Agency has multiple violations

   f. Below is an example of the reports produced by the UNC Agency Activity Status process:

UNC Activity Status by Group Reporting

This process is used to filter Agencies meeting the specified criteria and automatically update the status of those Agencies to another status. As an example, this process may be used to update all "School" agencies to inactive at the end of the school year and then subsequently reactivate them at the beginning of the next school year.

1. To run the "Update Agency UNC Act. Status" report, go to Departments → Financial Management → Tasks → Receivables
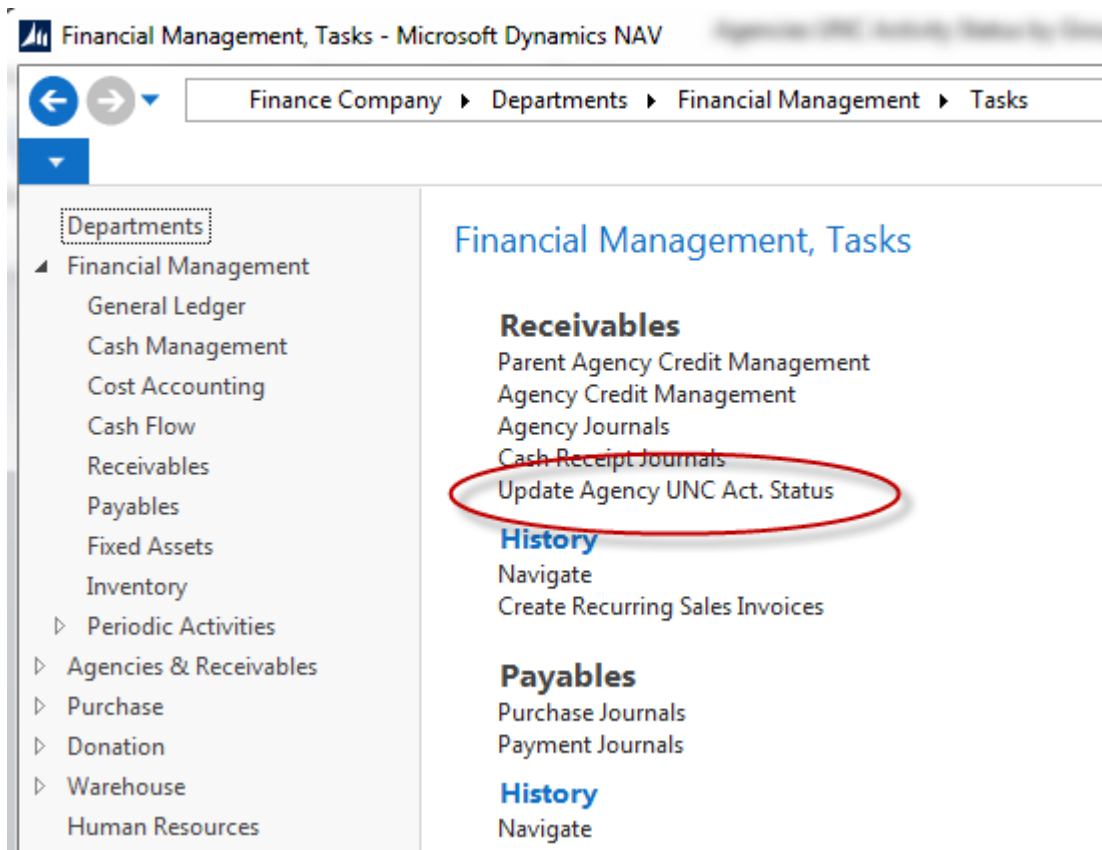
2. Click on "Update Agency UNC Act. Status" and the Update Agency UNC Act. Status Page opens as shown below

Edit - Update Agency UNC Act. Status

ACTIONS

Clear Filter
Page

Options

New UNC Activity Status: INACTIVEFB

Update Statuses: ☐
Agencies will be updated when this field is flagged.

Agency

Show results:

✕ Where   No. ▾ is   Enter a value.
✕ And   Agency Posting Group ▾ is   GENERAL
✕ And   FBC Agency Category Code ▾ is   DAYCARE
✕ And   UNC Activity Status ▾ is   ACTIVE
✚ Add Filter

Limit totals to:
✚ Add Filter

Print... ▾   Preview   Cancel

3. The process will open the "Update Agency UNC Act. Status" request Page. On this Page you will need to specify the status you wish the Agencies to be changed to and the filter criteria desired to select the Agencies to be changed.

In the example above, we have selected all Agencies where the Agency Posting Group is "GENERAL", the current UNC Activity Status is "ACTIVE" and the FBC Agency Category Code is "DAYCARE". All agencies matching this filter criteria will be selected and have their UNC Activity Status changed to "INACTIVEFB".

Note: You must check the "Update Statuses" box to actually change the status. Failure to check this box will produce a report showing agencies that would be affected by this process but will not actually update the agencies statuses.

4. The process requires the following fields to have a value:
   a. Options FastTab

i.   New UNC Activity Status
                    ii. Update Statuses. This field, when unchecked, allows the user to preview the
                         report before updating the Agencies.
          b. Agency FastTab
                    i.   Agency Posting Group
                    ii. UNC Activity Status
                    iii. FBC Agency Category Code

5. When you print/preview the report, Ceres will validate the parameters and update (change) the
    record(s) with the NEW UNC Activity Status. As an example, the food bank wanted to turn all
    school based Agencies to Active Inactive at the beginning of summer and then reactivate them at
    the beginning of the school year.

Update Agency UNC Act. Status

Update Agency UNC Act. Status   8/15/2014 12:12 PM
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Agency Posting Group: GENERAL, FBC Agency Category Code: DAYCARE, UNC Activity
Status: ACTIVE
New UNC Activity Status   INACTIVEFB

No.	Name	Old UNC Activity Status	New UNC Activity Status	Comment
D0142	Emmanuel Family &	ACTIVE	INACTIVEFB	
D0144	The Salvation Army	ACTIVE	INACTIVEFB	
D0156	Englewood Assembly of God-	ACTIVE	INACTIVEFB	
D0172	Cross Point Assembly of God	ACTIVE	INACTIVEFB	
D0208	Bare Essentials	ACTIVE	INACTIVEFB	
D0226	Landmark Christian	ACTIVE	INACTIVEFB	
D0242	ICAN	ACTIVE	INACTIVEFB	
D0420	Children's Center Campus	ACTIVE	INACTIVEFB	
D0718	Nova Center, Inc.	ACTIVE	INACTIVEFB	
D0754	Rainbow Options II	ACTIVE	INACTIVEFB	
D0756	Rainbow Options I	ACTIVE	INACTIVEFB	
D0758	Rainbow Center	ACTIVE	INACTIVEFB	
D0774	Archie Educational Daycare	ACTIVE	INACTIVEFB	
D1133	Glad Tidings Assembly Of	ACTIVE	INACTIVEFB	

Related Topics:

1. Agency Overview
2. Agency Compliance