

# eForms

## Getting Started Checklist



eForms is an all-in-one enrollment process for the food program that eliminates paper forms for your back-office. This guide is meant to walk you through the enrollment process with eForms. We recommend you print it and check off each item as you complete it.

**Note:** You must have the **eForms** permission enabled on your account to use the eForms feature.

### **Send Invitations**

Click **Send Invitations** from the **eForms** menu. The Send Invitations page opens. Use this page to send enrollment invitations to guardians. Parents with an email address on file automatically receive an email inviting them to update participant enrollment or income eligibility information online.

For more information, see [Send Invitations](#).

### **Track Invitation Status**

Click **View Status** from the **eForms** menu. The View Status page opens. The number of invitations display, as do the total sent, not started, in progress, submitted, and so on. Use the filters to display only those invitations you need to view.

For more information, see [View Enrollment Status](#).

### **Working with Guardians**

The following are common situations you may encounter while using eForms:

- o Guardians do not receive the initial email. In this case, advise guardians/guardians to check their spam/junk folders. You can also update their email addresses and re-send invitations. For more information, see [Update Parent Email Addresses](#) and [Resend Invitations](#).
- o Guardians do not have an email address at all. If this is the case, you can open the forms and have the parent complete the forms onsite. For more information, see [Complete eForms On-Site](#).
- o Guardians complete enrollment forms on paper. Simply mark the form as manually completed in KidKare and send the form to your sponsor. For more information, see [Mark Forms as Manually Completed](#).

### **Review Forms**

Click **Approve & Renew** from the **eForms** menu. The Approve & Renew page opens. As forms are completed, they are added to this page. Click a participant's name to view their updated enrollment details. Compare the old forms to the new forms, check parent signatures, and ensure that everything is in order.

If forms need changes, you can send them back to guardians for revision. If they do not, you are ready to approve and renew.

For more information, see the [Approving and Renewing Enrollments Individually](#) heading in the [Approve and Renew](#) article.

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- Approve & Renew**

Use the **Approve & Renew** page to approve enrollments, renew enrollments, or approve and renew enrollments in one step. Enrollment information is not updated in the participant's file until you renew enrollments.

For more information, see **Approve and Renew**.

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**Note:** In most cases, it is best to wait until your current claims are processed before you renew enrollments. For example, if your new enrollment start date is 10/1, you should wait until the September claim is processed before renewing. You can approve enrollments and later return to renew them.

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