Mealtracker Direct
Training Outline

Overview: This course is divided into two sessions. Session one will familiarize you with the program and demonstrate the various resident profile functions. Session two will describe the cycle menu details of the system and how these primary aspects of the program work together to print tray tickets. At the conclusion of the course, it is expected that you will have a basic understanding of the system and will be able to navigate through these primary functions of the program.

Documents: Course outline and supporting documents available for download at Online Training Resources.

Documents that may be of interest:
- Sample Tray Ticket with notations
- Resident Input Form
- Select Menu Process
- Frequently Asked Questions (FAQ’s)
- Thickened Liquids Setup
- Creating a Holiday Menu
Introduction to MealTracker –

- Log on / Access to Mealtracker Direct
- Mealtracker Search
- Context Sensitive Help
- The Toolbar

Settings
- General
- Residents
- Printing
- Styling
- Account
- Users

Tools
- Security
- Action Log
- Remove Inactive Residents
- Reduce Master Items List
- Remove Duplicate Master Items
- Reduce Portion Sizes
- Remove Expired Special Requests
- Tray Ticket Diagnosis

Reports - These are mostly shortcuts to features/functions from Daily Tasks or I Listings.

Help – Access to reference manual as well as other user learning tools.
Nutrition- is covered under a separate training session

Mealtracker Main program

Residents
- Add, Edit Residents
- Listing – Reports
- Groups - Creating and editing resident groups
- Weights - Entering resident weights
- Dining Order - Editing and entering residents in Dining Order

Daily Tasks
- Print tray tickets, labels and production reports and selective menus
- Meal Selections – Enter selections for “Select” status residents

Details – Menus, food items
- Food Items – Manage food items
- Recipes – Manage / Print recipes
- Cycle Menus – Import / create and modify and print menu data
- Costing – Manually cost food items
Session I - Resident Data

Resident Column – The information entered and stored here, determines what food items will be printed on the tray tickets. (Average time is 10 minutes per resident to input.)

Add New Resident Profile

Name – May be entered First name (space) Last name or Last name, first name (requires a comma after the last name. Consistency is the key.
Room # - Must be unique – May use dashes or spaces but must be consistent for sorting and reports to be correct and uniform.
Diet - This list is specific to your facility and may be modified. Select most restrictive diet from the drop down menu.
Dietary Note – This is a single line text note displayed below the diet on tray tickets. Type the additional therapeutic diet information or consistency. Examples:
NAS/THICKENED LIQUIDS
DIABETIC
CAL. CONTROLLED.
Status – Active, Select or Inactive

Click on ADD Resident or Save and Add another

Resident Detail Information – Specific resident information which dictates what food items from the selected menu will be printed on the tray tickets.

Resident Preferences

- Special Requests - Used to add food items requested by resident for meal(s) regardless of what is on the menu. Special request items may replace a menu category or be added in addition to menu categories if you choose not to replace the menu item. Examples include:

<table>
<thead>
<tr>
<th>Meal</th>
<th>Food Item</th>
<th>Portion</th>
<th>Day</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>B/L/D</td>
<td>Coffee</td>
<td>1 Cup</td>
<td>Every Day</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Orange Juice</td>
<td>.5 Cup</td>
<td>Mo We Fr</td>
<td>Appetizer</td>
</tr>
<tr>
<td>Dinner</td>
<td>Ice Cream</td>
<td>.5 Cup</td>
<td>Sa</td>
<td>Dessert</td>
</tr>
</tbody>
</table>

- Likes - Will re-prioritize the menu based on resident likes. If resident likes the alternate, the system will give it to them over the first choice.
- Dislikes - Won’t serve items if on dislikes list, either individually or part of a group name. Individual dislike examples:
  CREAM OF BROCOLLI SOUP
  SAUERKRAUT
  Group Food (* items) dislikes and diet restrictions like:
  DAIRY GROUP
  TOMATO GROUP.
- **Menu Item Substitutions** - Allows you to directly substitute one food item in place of another.
  
  **Example:** *When French toast is on serve Scrambled Eggs*
  
  May also be used for individual item portion adjustments. This may be used for residents who want a little more or a little less of a specific item.
  
  For example:
  
  *When Scrambled Eggs are on serve Scrambled Eggs 0.5 Cup.*

- **Between Meal Snacks** - Used to print snack labels, Summary Sheets, and count sheets for the 10:00, 2:00, and H.S. Snack times. Put in exactly the same as Special Items but for snack times instead of meal times. (Snack times may be adjusted)
  
  **Example:**
  
  10 a.m./2 p.m. /HS ENSURE 8 OZ Every Day

- **Category Refusals** – Allows you to cancel all or part of a meal based on a resident’s request rather than by using dislikes. For example, if a resident gets a specific breakfast everyday (Orange Juice, Corn Flakes, and Toast). Put the specific items in under Special request and then use category refusals to cancel the normal breakfast (**will get only food items from special items if any**).
  
  Breakfast All Categories Every Day
  
  Another example might be no dessert at lunch.
  
  Lunch Dessert Every Day

**Resident Needs**

- **Allergies** - Allows you to specify specific food items or food groups that the resident is allergic to.
  
  **Group Food (* items) like:**
  
  - FISH GROUP
  - DAIRY GROUP
  - TOMATO GROUP.

- **Consistency Adjustments** - Normally choose all meals and all categories to let the Master Items List control which items actually need to be ground, chopped, or pureed. Note that you can choose individual meal categories if necessary.

- **Consistency Exceptions** - Allows consistency adjustments by item or group food rather than by category. Normal use example: All Categories Pureed but Pasta Group served Normal consistency.

- **Portion Adjustments** - May be individual meal categories like:
  
  - Large Entrée, Small Desserts or all categories like:
  
  - All Large portion.

- **Adaptive Equipment** – Used to indicate any adaptive equipment required by resident. These may be added to a meal, all items in a category or to specific items.

  Some Examples are:
  
  - Divided Dish *added to Entrée (Category)*
  
  - Special Utensils *added to all meals (Meal)* – Will print below food items on tray ticket for meal indicated.
  
  - Sippy Cup *added to Orange Juice* – (Item)
Resident Notes

- **Category / Item Notes** - Single line notes to print within the body of the menu on the tray tickets. Category and Item notes are also tallied on the count sheets if so selected in settings. The only difference between the two is how the computer knows when to print the note. When any item in the category is chosen, for example:

  **Category Note:**
  Vegetables - In Separate Bowl
  or when a specific item is chosen,

  **Item Note:**
  BAKED CHICKEN - WHITE MEAT ONLY

- **Notepad** - Multiple line space beneath the three stars on the bottom of the tray tickets. This is a text box where you can place any additional information for each resident. Typical uses include:
  - Condiments (SALT, PEPPER, SUGAR, SUGAR SUB).
  - Allergies: ALLERGIC TO TOMATOES.
  - Dining location: EATS IN ROOM, MAIN DINING ROOM.
  - Special Instructions: ASSIST WITH FEEDING.

  **Staff should agree on what information is going to be placed in the notepad and in what order so the tray tickets will be consistent. Notepad is simple text. Does not appear on production sheets.**

Resident Clinical Information

- **Clinical Notes** – Blank notepad editor used to enter all non-meal related notes into resident record. Any notes entered may be printed with the resident profile for care planning meetings or Dietitian review. Information might include physician name, drug allergies, etc. Date of note is automatically inserted.

- **RDA / BEE Information** - BEE information: Activity Level, Injury Level for calculation of BEE and Protein Needs, may be modified in Setup Parameters. Information entered here with the Resident statistics are used by the system to calculate RDA data.

- **Weight Tracking** -- Entry of weights and corresponding dates for tracking of weight gains and/losses.

Resident Details

- **Resident Statistics** – DOB for reports and greetings. Sex, Height and weight used for RDA and BEE calculations

- **Resident Groups** - Used to add or remove a resident from any ‘specified’ production groups. (Not necessary to review during initial training.)

- **Skipped Meals** – Select days the you know that the resident will not receive a meal

- **Days to Monitor** – If you need to monitor resident, select days to monitor

- **Multiple Count Option**- If you wish to add any number of meal counts to production sheets.

- **HL7 messages** – if connected to an external system. Incoming messages will display.
Daily Tasks

- **Print**
  - Tray Tickets – print tray tickets
  - Production Sheets – Print production sheets
  - Production Detail Report – details of specific item on the production sheet
  - Snack Forms – Print snack labels or summary report
  - Beverage Labels – Print labels for any food items
  - Selective Menus – Print Selective Menus for Select residents
  - Shopping List – Print a shopping list based on Production sheet calculation

- **Meal Selections**
  - Enter Selective Menus – Enter the selections the residents have made into the system. Once selections have been entered, their tray tickets may be printed with the active resident’s tickets.
  - Clear Resident meals – Remove items previously selected for select residents

**Session II – Menu and Food Items**

**Details**

- **Food Items**
  - Change, Add and Delete specific food items.
  - 670 food items are pre-loaded into the system.
  - Food Item Consistencies – worksheet to manage food item consistency instructions
  - Production Details – Allows modification of food items production job type and base categories
  - Food Item Condiments – Add, change or delete condiments attached to food items
  - Food Items Exceptions – Manage items that cover more than one category
  - Food Item Costs – Enter manual costs per serving food items
  - Group Foods – Managing “Group Foods” – items grouped together because of a common element.
  - New Items to Group Foods – Add new items to existing group foods.
  - Group Food List Report – Print group food reports
  - Print Food Items Report – Print lists of your food items by category / Menu / Heart Healthy
  - Item Usage Report – Lists where in a selected menu or resident profile a food item exists

**Recipes**

**Cycle Menus** – Control all of your menu food items and details from here.

- **Change Menu** (Average time is 10 hours per cycle week to input a new menu.)
  - Multiple food items in the same category are alternates.
  - Auto-select will choose one item from each category. Always the first choice in the category, unless the item is rejected by the profile, in which case, the alternate will be chosen.
  - Highlight bar tools
  - Add - Can add item to multiple diets at a time.

For example Soup as an appetizer to all diets.

Note that the soup is added and then ‘spread’ across the different diets just like you would do on a hand written diet guide sheet. It is not necessary to enter each diet individually.

Note also that priority number simply refers to the order that the items appear within each meal category. For most items you would simply press enter to signify that the item you’re adding is the ‘next available item’.
Delete - Delete highlighted item from menu.
Click on “Previous Diet” & “Next Diet” buttons – To view different diets.
Exception - When one item covers more than one category. For example:
Beef Stew is the Entrée, Starch and Vegetable.
Condiment - When an item is served with another item.
Consistency - Ground / Chopped / Pureed instructions.
Portion Size - Change portion size for displayed diet only.
Always Offered – Food and beverages that don’t vary from day to day.
Print Diet Guides & Print Week-at-a-Glance - Printing Menus for review.
Print Diet Guides = Diet extension sheets.
Print Week-at-a-glance = Week at a glance of cycle menu.
Print Tray Tickets - May be done when auto-selecting or separately after auto-select.
  Print Production Sheets - Must be done after auto-select in order to be accurate.
  Print Snack Forms – Print snack labels or snack summary sheets.
  Print Selective Menus – Print menus for residents that select their own meals. Blank
    Masters have lines for entering a resident’s name and room number (may be used for guests).

Note: This course may be modified, extended or presented in a different order than described in this
document depending on the facility and their requirements or preferences.

For additional instruction/review, we recommend that you download the training videos on the
customer support page of our web site or join one of our free Webinars each month.