

Meal Plans

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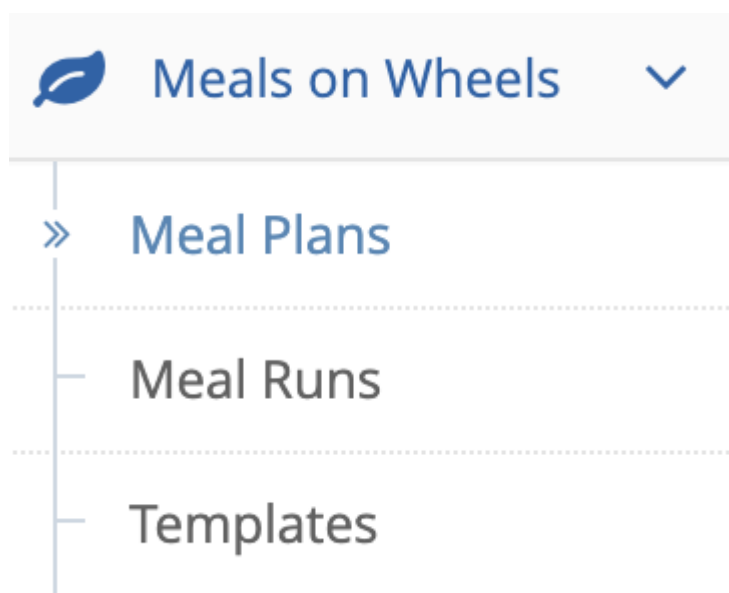
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View Meal Plans

There are a few ways to get to a client's meal plan:

1. Click the **Meals on Wheels** option in the menu and select **Meal Plans**. Then select the client from the **Client** bar in the top right.



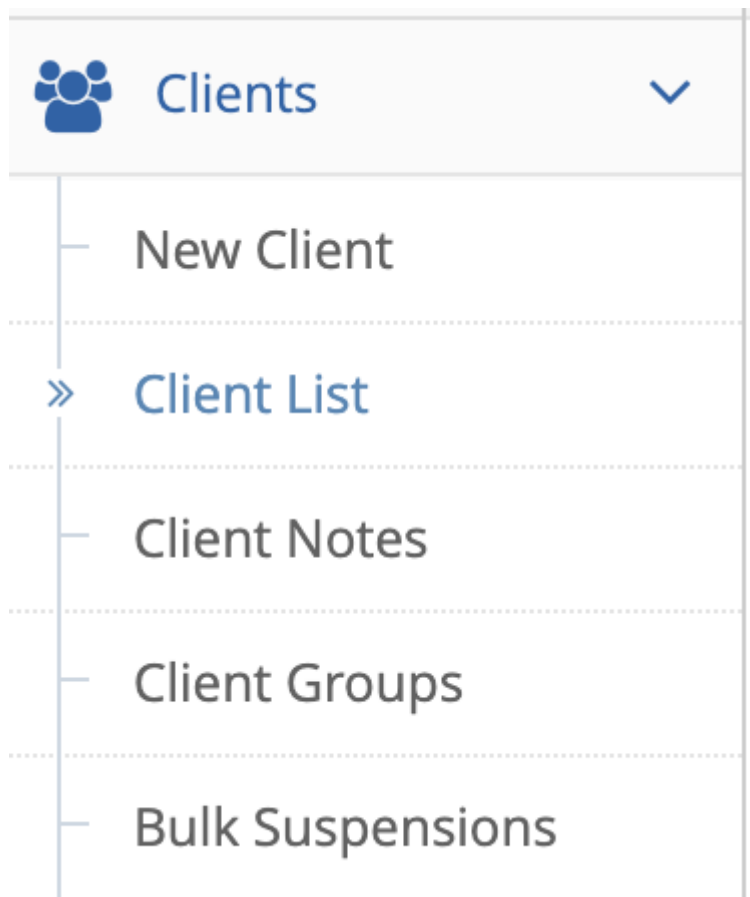
Meal Run: Please Select

Client: Goldings, Jennifer

29/09/2022

View Recurring Meal Plans

2. Click the **Clients** option in the menu and select **Client List** (or use the **Clients** shortcut button above the main menu). Select the desired client, and click on the **View Meal Plan** option under their name.



Apples, Terry
 Car A, Car C

View Details
 View Notes
 View Meal Plan
 Service History
 Add/View Suspensions
 View Account: \$-116.35
 Print Client File
 Manage Groups

3. Navigate to the client's **Client Page**. Click the **Actions** button, and select the **Meal Plan** option.

Terry Apples (#2202)

Car A
Car C

Client Information	Client Contacts	Other Information	Health Information	Meals On Wheels	Service History	Documents & Files	Job Notes	Actions ▼
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Name Details

Title:

Mr ▼

First Name:

Terry

Surname:

Apples

MYOB Card #:

MYOB Card #:

Also Known As:

Also Known As...

Using a Pseudonym:

NO ▼

Client Notes

Meal Plan

Suspensions

Account (\$424.65)

View Balance on Date

Print Client File

Add/Remove Profile Picture

The client's Meal Plan Page is a weekly view of all meals the client will be receiving. Each day lists the individual meals to be delivered on that day, as well as the total number of meals and total price.

If a client has anything listed in the free-form **Dietary Requirements** field on their Client Page, it will be displayed on this page, as well as their **allergies, restrictions and properties**. If a client has a **suspension** during the selected week, it will be displayed on this page.

Home > Meals On Wheels > Meal Plans

Meal Run: Please Select Client: Apples, Terry

Meal Plans » Week 40 29/09/2022

Client Suspensions View Recurring Meal Plans

Dietary Information: Gluten Free	Allergies: • Egg	Restrictions: • Vegetarian	Properties: • Cut Up • Glucose Free • Pureed
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September 25th - Oct 1st: Terry Apples (Run: Car A, Car C) Abbeywood

Sunday 25th	Monday 26th	Tuesday 27th	Wednesday 28th	Thursday 29th	Friday 30th	Saturday 1st
Total Meals: 0	Total Meals: 0	Total Meals: 0	Total Meals: 0	Total Meals: 0	Total Meals: 0	Total Meals: 0
Total Price: \$0.00	Total Price: \$0.00	Total Price: \$0.00	Total Price: \$0.00	Total Price: \$0.00	Total Price: \$0.00	Total Price: \$0.00

You can use the **Date Arrows** to move between weeks, or click the **Date** to view a particular date.

The meals on this page are colour-coded for convenience:

- **Dark Blue:** an **Ad-Hoc or Once-Off** meal. This meal will only be delivered on that date to that client.
- **Light Blue:** a **Recurring** meal. This meal will continue to be delivered to this meal based on their recurring meal plan.
- **Purple:** an **Allergic** meal. This meal has an ingredient that the client is allergic to.
- **Red:** a **Cancelled** meal. This meal could have been specifically cancelled, or the client may have a suspension on that date.

Add and Remove Ad-Hoc Meals

To create a new **Ad-Hoc** meal, simply click the blue **Arrow** button on the particular date you're adding a meal for. This will bring up the **Add Meal** pop-up, where you can select one or more meals from a single available menu to add for that date. If the selected meals has **Properties**, you'll be able to select those here.

Monday, 3rd of October 2022

Please select an available menu:

Fresh Menu (week 2)

Please select a meal from the Fresh Menu (Monday, week 2)

1

Roast Lamb with gravy

+

Property:

Normal

Meal Comments:

Meals to be Added:

Qty	Meal	Property	Comments	
-----	------	----------	----------	--

Add Meals

Once you've selected the menu and a meal, click the blue **Plus** button to add that meal to the "Meals to be Added" list. You can then select more meals, clicking the Plus button each time, to fill out the list. Once you're happy with the list of meals to be added, click the **Add Meals** button to add the meals.

Please select a meal from the Fresh Menu (Monday, week 2)

1

Please Select





Property:

Normal



Meal Comments:

Meals to be Added:

Qty	Meal	Property	Comments	
1	Roast Lamb with gravy	Normal		
1	Soup - Spiced Winter Vege	Normal		

Add Meals

To **Delete** an ad-hoc meal, just click the meal on the Meal Plan. This will bring up a pop-up where you can choose to update or delete that meal.

×

Update or Delete Meal:

1x Roast Lamb with gravy (Cut Up)

Qty:

1

Property:

Normal


Meal Comments:

Save Changes

🗑️

Delete Meal

If you select Delete, another pop-up box will appear and you'll need to fill out the Accounts and Stock actions to confirm the meal cancellation.



Cancel Meal Delivery

Accounts Action:

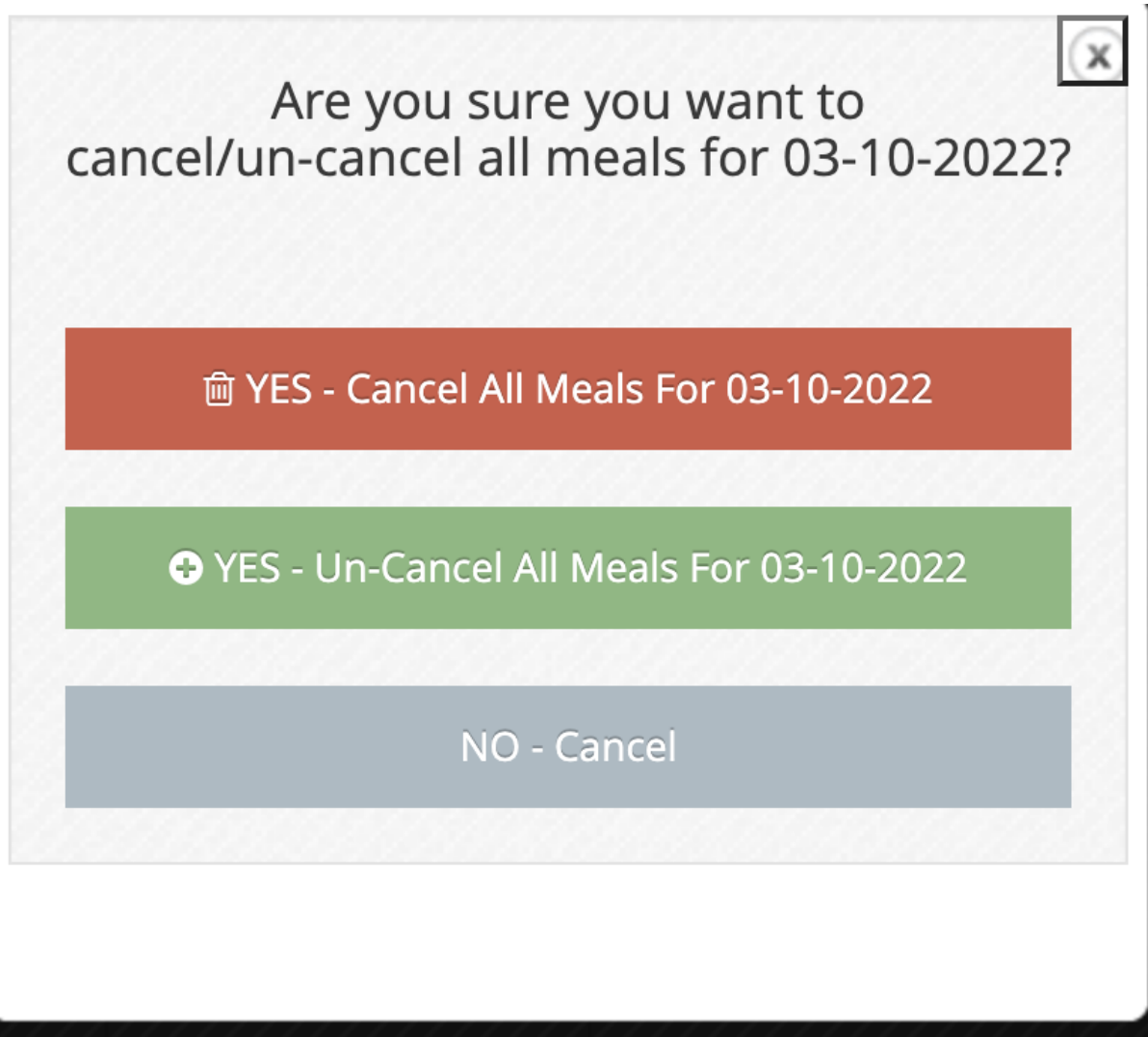
Client Not Charged

Stock Action:

Meal Returned

Cancel Meals

To **Delete All Meals** for one day, click the Total for that day - You'll be given the option to Cancel or Un-cancel all meals for that day.



To **Cancel** a recurring meal, click the meal on the Meal Plan. A cancelled meal doesn't remove the meal from the recurring meal plan forever, just cancels that one specific delivery.

Create Recurring Meal Plans

A **Recurring Meal Plan** is a meal plan that appears on reports and the meal plan page every week between its start and end dates. These are very useful for clients who get the same thing every week, or who have decided on a set of meals for a period of time (eg: they have selected all meals for a month).

To view the recurring meal plans of a client, go to that client's Meal Plan Page. Then click the **View Recurring Meal Plans** button. The Recurring Meal Plans page will list all recurring meal plans for a client. Each meal plan lists the associated menu, the start and end dates of the meal plan, and the total amount of meals in the plan. You

can also filter the meal plans by their status: Past, Present or Future. Meal plans are coloured based on their status:

- **Red:** A **Past** meal plan. A meal plan that starts and ends in the past.
- **Green:** A **Present** meal plan. A meal plan that starts in the past (or today), and ends in the future (or has no end date).
- **Blue:** A **Future** meal plan. A meal plan that starts in the future, and either ends in the future or has no end date.

	23	Fresh Menu	Tuesday, 4th of October 2022	No End Date Selected	12	
	24	Fresh Menu	Tuesday, 27th of September 2022	Thursday, 29th of September 2022	3	
	25	Fresh Menu	Sunday, 4th of September 2022	Friday, 9th of September 2022	4	

You can **View** and **Copy** existing meal plans from this page, as well as **Create** new meal plans.

To **Create** a new meal plan, click the **New Recurring Meal Plan** button on a client's Recurring Meal Plans Page. This will take you to the New Recurring Meal Plan page.

Terry Apples

New Recurring Meal Plan

Show All Mealplans

Here, you must select a number of options. To start with, the **Client**, which is pre-filled with the client whose Meal Plan Page you were on. Then the **Start Date**, which is pre-filled with today's date. The **End Date** is optional: if you don't fill this in, the meal plan will continue indefinitely. The **Fortnightly** option means that the plan will only be activate once per fortnight. The **Menu** determines which meals will be displayed.

New Recurring Meal Plan

Apply Template

1. Select A Client
Apples, Terry

4. Fortnightly ** optional
No

2. Select A Start Date
30/09/2022

3. Select An End Date ** optional
dd/mm/yyyy

5. Select A Menu
Fresh Menu

Diet Requirements:

Gluten Free

Meal Restrictions:

- Vegetarian
- Egg

Fresh Menu

Meal Restriction Applied

Select All Deselect All	Qty.	Filter by meal name	Filter by meal category	Filter by property	Filter by week	Filter by
<input type="checkbox"/>	1	Beef Stroganoff	Frozen Meals	Please Select	Week 1	Monday
<input type="checkbox"/>	1	Blend - Chicken and vegetable	Hot Meals	Please Select	Week 1	Monday
<input type="checkbox"/>	1	Beef and Bacon casserole	Hot Meals	Please Select	Week 1	Tuesday

Note: once you change the **Start Date**, the list of available menus will be refreshed, and all meals will vanish. For this reason, please select the dates of the meal plan before the menu.

Once you've selected the **Start Date** (and optionally, the **End Date**) and the **Menu**, you'll be presented with a list of all meals in that menu. You can filter these meals by their **Name**, the **Category**, the **Week** of the menu they appear on, the **Day** of the week they appear on, and the **Property** selected.

To select a meal to add to the meal plan, just check the **checkbox** next to its name. The **quantity** is pre-filled with "1", but you can change that if the client would like more of that meal.

Fresh Menu

Meal Restriction Applied

Select All Deselect All	Qty.	Filter by meal name	Filter by meal category	Filter by property	Filter by week	Filter by
<input checked="" type="checkbox"/>	1	Beef Stroganoff	Frozen Meals	Please Select	Week 1	Monday
<input type="checkbox"/>	1	Blend - Chicken and vegetable	Hot Meals	Please Select	Week 1	Monday
<input type="checkbox"/>	1	Beef and Bacon casserole	Hot Meals	Please Select	Week 1	Tuesday
<input checked="" type="checkbox"/>	1	Curried Prawns and rice	Hot Meals	Please Select	Week 1	Tuesday
<input checked="" type="checkbox"/>	1	Soup - Minestrone	Soup	Please Select	Week 1	Tuesday

When you're done, click the **Save Meal Plan** button to add the meal plan to the client. You'll be able to see all these meals on the client's Meal Plan Page.

Save Meal Plan

Apply Template

Note: If you have selected any meals the client is **allergic** to, you'll be warned and have to change those meals before you can save the meal plan.

Update Recurring Meal Plans

Updating a recurring meal plan can affect past accounts and meal plan histories for your clients.

If you want to make a change that will only affect the plan going forward, you need to **copy** the recurring meal plan and make the changes to the new meal plan. That way, the changes won't affect the client's history; they'll only take effect going forward.

Polixen can automatically do this for you, or you can follow the manual procedure.

The automatic procedure

Update the current meal plan. Then click the **Save** button.

On the popup, click the second option: "Create a new Meal Plan & Accounts". This will end the current meal plan and apply your changes to a copy of the meal plan that starts on the next day.

This Change Affects Past Meals Delivered



Due to this meal plan starting in the past, the changes you have made may affect past accounts and stock figures.
Please make a selection from the following.

Update Meal Plan & Accounts	This will re-calculate charges for all meals delivered from Tuesday, October 4th 2022 until Thursday, October 6th 2022. Note: This will use current meal prices.
Create a new Meal Plan with these changes	This will create a new meal plan that starts tomorrow with these changes. The current meal plan will end today. This will not affect past accounts.
Cancel	Do not update this meal plan.

Note: Occasionally you **do** want to update the accounts and meal history for the client. In this case, click the first option to simply update the current meal plan.

The manual procedure

Copy the current recurring meal plan by clicking the yellow **Copy** icon next to the meal plan on the client's Recurring Meal Plans page.

	ID	Menu	Start	End	Number of Meals	Copy
	23	Fresh Menu	Tuesday, 4th of October 2022	No End Date Selected	12	

End the current recurring meal plan (set its **End Date** to today) and **Start** the new recurring meal plan (set its **Start Date** to tomorrow).

COPY

X

Copy Recurring Meal Plan

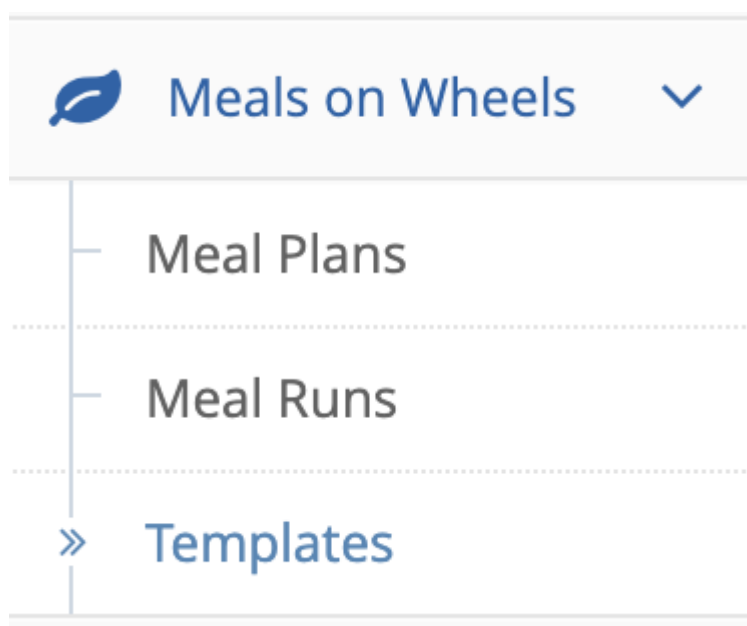
Old Start Date:	New Start Date:
<input type="text" value="04/10/2022"/>	<input type="text" value="07/10/2022"/>
Old End Date:	New End Date:
<input type="text" value="06/10/2022"/>	<input type="text" value="dd/mm/yyyy"/>

Copy Meal Plan

Update the new recurring meal plan's meals.




Meal Plan Templates

If many clients have the same meal plan, it can help to use **Meal Plan Templates**. A template is simply a list of meals that can be copied into a recurring meal plan when creating it. To view all templates on your system, click the **Meals on Wheels** option in the menu and select **Meal Templates**. You'll be taken to the Meal Plan Templates page.



To **View** an existing template and **Update** it, click the blue **Information (I)** button next to its name.

To **Delete** an existing template, click its red **Garbage Bin** icon.

Meal Plan Templates					New Template
<input checked="" type="checkbox"/> Only Show Active Templates					
	Name	Menu	Meals	Copy	
	Mon-Tue-Wed Mains	Fresh Menu	6		

To create a new meal plan template, click the **New Template** button. Creating a template is very similar to creating a Recurring Meal Plan: once you give the template a **Name**, and select a **Menu**, you'll be able to select meals from that menu. Once you've selected the desired meals, click the **Create Template** button to save it.

Please enter a template name:

Test

Please select a menu

Winter Menu

Template Services

Create Template

Winter Menu

Select All	Qty.	Filter by meal name	Filter by meal category	Meal Properties	Filter by week	Filter by day
<input type="checkbox"/>	1	Beef & Bean Burrito Large	Frozen Meals	Normal	Week 1	Monday
<input type="checkbox"/>	1	Beef & Bean Burrito Large	Frozen Meals	Normal	Week 1	Tuesday
<input type="checkbox"/>	1	Beef & Bean Burrito Large	Frozen Meals	Normal	Week 1	Wednesday

When you're creating a Recurring Meal Plan, you can apply a template to speed up the process. To do so, click the **Apply Template** button on the New Recurring Meal Plan page. You'll see a list of templates with the same **menu** as the meal plan.

New Recurring Meal Plan

Apply Template

1. Select A Client

Apples, Terry

2. Select A Start Date

06/10/2022

3. Select An End Date *** optional*

dd/mm/yyyy

4. Fortnightly *** optional*

No

5. Select A Menu

Please Select

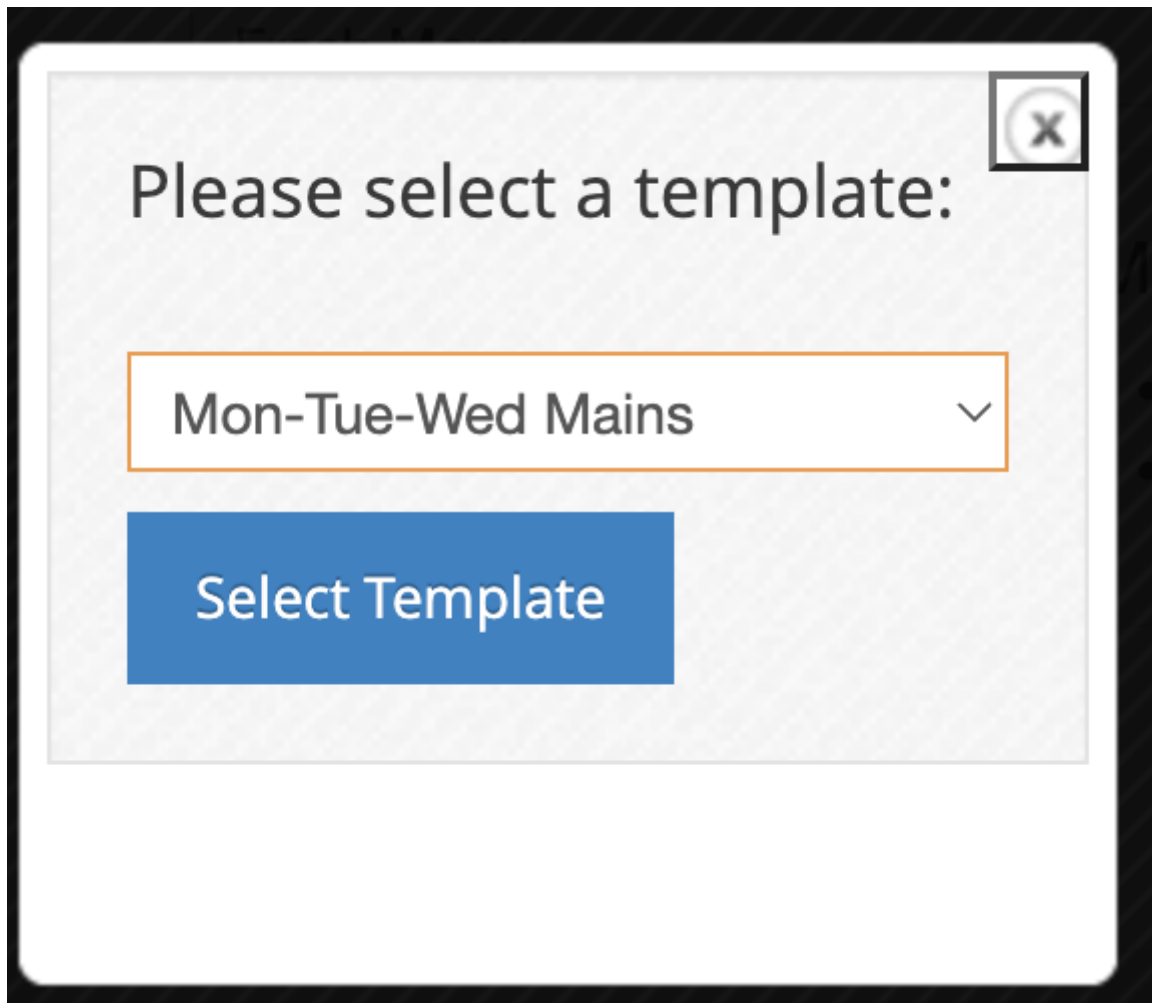
Diet Requirements:

Gluten Free

Meal Restrictions:

- Vegetarian
- Egg

Select a template and click the **Select Template** button to copy the meals into the meal plan.



Please select a template:

Mon-Tue-Wed Mains

Select Template

Note: It's important to note that there is **no link** between a template and a meal plan. Applying a template just **copies** the meals into the meal plan.