Required Documentation for School Meals

Healthy School Meals
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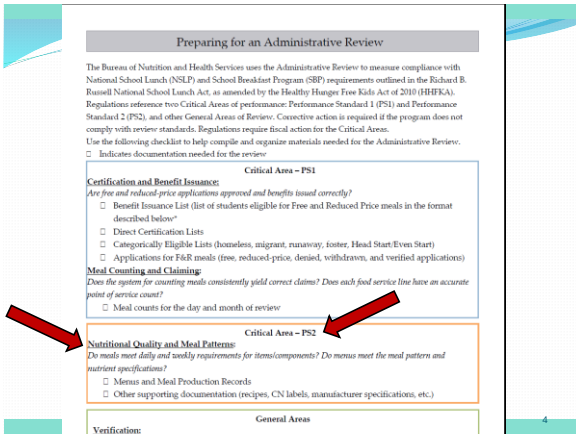
Bureau of Nutrition and Health Services

QUESTIONS- We've got answers!!!!

- Why do I need to document?
- What do I need to document?
- Where can I find it?
- How do I organize it?

Why do I need to document?

- Planning efficiency
- Administrative Review requirements



Preparing for an Administrative Review

The Bureau of Nutrition and Health Services uses the Administrative Review to measure compliance with National School Lunch (NSLP) and School Breakfast Program (SBP) requirements outlined in the Richard B. Russell National School Lunch Act, as amended by the Healthy Hunger Free Kids Act of 2010 (HHFKA). Regulations reference two Critical Areas of performance: Performance Standard 1 (PS1) and Performance Standard 2 (PS2), and other General Areas of Review. Corrective action is required if the program does not comply with review standards. Regulations require fiscal action for the Critical Areas.

Use the following checklist to help compile and organize materials needed for the Administrative Review.

☐ Indicates documentation needed for the review

Critical Area – PS1

Certification and Benefit Issuance:

Are free and reduced-price applications approved and benefits issued correctly?

- ☐ Benefit Issuance List (list of students eligible for Free and Reduced Price meals in the format described below*
- ☐ Direct Certification Lists
- ☐ Categorically Eligible Lists (homeless, migrant, runaway, foster, Head Start/Even Start)
- ☐ Applications for F&R meals (free, reduced-price, denied, withdrawn, and verified applications)

Meal Counting and Claiming:

Does the system for counting meals consistently yield correct claims? Does each food service line have an accurate point of service count?

- ☐ Meal counts for the day and month of review

Critical Area – PS2

Nutritional Quality and Meal Patterns:

Do meals meet daily and weekly requirements for items/components? Do menus meet the meal pattern and nutrient specifications?

- ☐ Menus and Meal Production Records
- ☐ Other supporting documentation (recipes, CN labels, manufacturer specifications, etc.)

General Areas

Verification:

4

Required documentation

- Menus
- Production Records
- Standardized Recipes
- Component contribution of purchased items
- Nutrient Information
  Calories, Saturated Fat, Trans Fat, Sodium
- Bid specifications

Menus

- Will use some of the other documents as you plan
- Must include all components
- May look different for public and staff, but all items should be included
- Consider cycle menus

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Information for Menu Planning
(NOT REQUIRED)

Information for Menu Planning- SAMPLE

Do I have this information for each item served?
Is this item one of the higher or lower in calories, saturated fat, or sodium?

NOT A REQUIRED FORM, but could be useful when Menu Planning

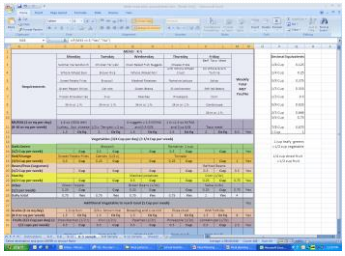
Item	Serving Size	Component Contribution	Calories	Saturated Fat (grams)	Sodium (milligrams)	How do I know
Main Dish:						
Macaroni & Cheese	2/3 cup	2 oz M/MA and 1 oz-equiv whole grain	287	2.92	801	Entree Recipe #10 with nutrient analysis
Little sandwich	8 (3.4 grams) each	2 gg M/MA 3= 1 wg, 4= 2.25 wg, 5= 1.5 wg	200	6	690	CN and Nutrition label
USDA Chicken fajita meat	2.7 ounces	1 gg M/MA from 1.7 ounces	81	1	303	USDA Foods Fact Sheet and Product Formulation Statement
Grain Sides:						
Corn Tortilla Chips	1 oz/15 chips	1 oz-equivalent whole grain rich	140	1	101	Nutrition facts label and Grain/bread chart
Bread	1 slice 28 gm	1 oz-equivalent	60	0	110	Nutrition facts label and Grain/bread chart
Whole grain tortilla	1 each 44 gm	1.3 gg-equivalents	120	2.5	340	Nutrition facts label and Grain/bread chart
Other:						
Reduced Fat Ranch Dressing	2 tbsp	NA	66	1.42	151	Nutrition facts label

Lunch Menu Planning Tool –Word
(NOT REQUIRED)

MENU TEMPLATE – Lunch K-6, 6-8, and 9-12

Menu	Mon	Tues	Wed	Thurs	Fri	Wk Total
Meat/meat alternate Grain Fruit Vegetable Milk	Submarine Sandwich Sweet Potato Fries Green Pepper Strips Pineapple Tidbits/Raisins Skim Milk 1%	Chicken Teriyaki on Brown Rice Broccoli Carrots Slaw Skim Milk 1%	Oven Baked Fish Tomato Whole Wheat Roll Mashed Potatoes Green Beans Applesauce Skim Milk 1%	Beef Taco on Whole Grain Tortilla Salsa Refried Beans Corn Mandarin orange Skim Milk 1%		
Meat/Meat Alternate K-6 (6 – 10 oz eq per wk, 1 oz min per day) 6-8 (8 – 12 oz eq per wk, 2 oz min per day) 9-12 (10 – 12 oz eq per wk, 2 oz min per day)	USDA deli turkey/roll for cheese K-5: 2 oz + 2 oz ms 6-8: 2 oz + 2 oz ms 9-12: 2 oz + 2 oz ms	K-5: 1.5 c. Teriyaki + 2 oz ms 6-12 ½ c. + 2 oz ms	K-5: 4 nuggets + 1.5 oz 6-12: 5 nuggets + 2 oz ms	K-5: 1 ea cheese 1.5 M/MA 6-12: 1 slice low fat sausage 2 M/MA	1 oz low meat	K-5= 8.5 oz 6-8=9.75 oz 9-12= 12.75 oz
Vegetable:						
Dark green		Broccoli		Romaine ½ c. w ½ c		K-12= ½ c.
Red/Orange		Carrots				
Bean/Peas (Legumes)					Refried beans	K-12 ½ c
Starchy	Sweet Pot. Fries			Tomato		
Other	Green peppers		Mashed potatoes			K-5 ½ c 6-12 ¾ c
Additional (K-5: 1 cup per week; 6-12: 2 cup per wk)			Green Beans		Salsa	K-5 ¼ c
Total Vegetable:	K-5: ¾ cup 6-12: ½ c.	K-5: ¾ cup 6-12: 1 cup	K-5: ¾ c 6-12 ½ c.	K-5: ¾ c 6-12 ½ c.	K-12 (2 c)	K-5 =4c 6-12 =5 1/4c
Fruit:	Mandarin orange	Pineapple	Applesauce	Mandarin	Applesauce	K-5 = 8oz 6-8 =8.25 oz 9-12 =10.75 oz
Fluid Milk	Skim Milk w 1% (8 oz)	Skim Milk w 1% (8 oz)	Skim Milk w 1% (8 oz)	Skim Milk w 1% (8 oz)	Skim Milk w 1% (8 oz)	

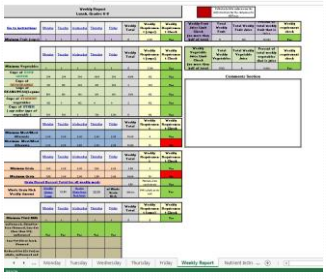
Menu Planning Tool-Excel
(NOT REQUIRED)



USDA Certification Worksheets

- Not required if already certified except one week for one school at time of review.
- Available for 3 to 7 day schedules
- www.fns.usda.gov
  - Child Nutrition, then National School Lunch Program, then Certification of Compliance

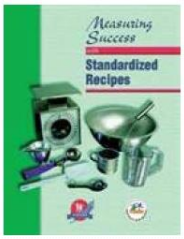
USDA Certification Worksheet
(NOT REQUIRED)



Food Production Records

- Required for both breakfast and lunch- includes serving sizes
- Must include actual quantities prepared of all food items including fruit/vegetable bars or other self-serve items.
- Must differentiate the number for ala carte and adult meals from reimbursable servings
- Cycle menus let you copy much of the planned information

Standardized Recipes



- Serving size and quantity for your school
- Component contribution
- Calories, saturated fat, trans fat, and sodium

Component Contribution

- Recipes
- CN labels
- Manufacturer's Statement
- Grain/Bread Chart and Nutrition Labels

Component Contribution - Recipe

Serving	Yield	Volume
¾ cup (6 fl oz spoodle) provides 1 ¼ oz equivalent meat/meat alternate, ¼ cup other vegetable, and ¾ oz equivalent grains.	50 Servings: about 21 lb	50 Servings: about 2 gallons 2 ½ quarts
	100 Servings: about 42 lb	100 Servings: about 5 gallons 1 quart

The grain ingredients used in this recipe must meet the Food and Nutrition Service whole grain-rich criteria.

Component Contribution – CN Label

CN

XXXXXX*

One 5.00 oz. Pizza with Ground Beef and Textured Vegetable Protein provides 2.00 oz. equivalent meat/meat meat alternate, ½ cup vegetable and 1 ½ servings of bread alternate for The Child Nutrition Meal Pattern Requirements. (Use of this logo And statement authorized by the Food and Nutrition Service, USDA XX-XX**.)

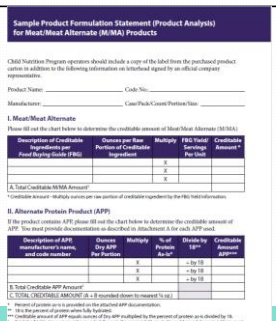
CN CN

CN

* CN identification number

** Month and Year of original approval

Component Contribution – PFS



Sample Product Formulation Statement (Product Analysis) for Meat/Meat Alternate (M/MA) Products

Child Nutrition Program operators should include a copy of the label from the purchased product carton in addition to the following information on letterhead signed by an official company representative.

Product Name: _____ Code No.: _____

Manufacturer: _____ Case/Pack/Count/Portion/Size: _____

I. Meat/Meat Alternate

Please fill out the chart below to determine the creditable amount of Meat/Meat Alternate (M/MA)

Description of Creditable Ingredients per Food Buying Guide (FBG)	Ounces per Raw Portion of Creditable Ingredient	Multiply	FBG Yield/ Servings Per Unit	Creditable Amount*
		x		
		x		
		x		
A. Total Creditable M/MA Amount[1]				

* Creditable Amount = Multiply ounces per raw portion of creditable ingredient by the FBG Yield/Servings.

II. Alternate Protein Product (APP)

If the product contains APP, please fill out the chart below to determine the creditable amount of APP. You must provide documentation as described in Attachment A for each APP used.

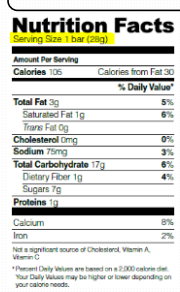
Description of APP, manufacturer's name, and code number	Ounces Dry APP Per Portion	Multiply	% of Protein As-is*	Divide by 18**	Creditable Amount APP***
		x		÷ by 18	
		x		÷ by 18	
		x		÷ by 18	
B. Total Creditable APP Amount[1]					
C. TOTAL CREDITABLE AMOUNT (A + B rounded down to nearest ¼ oz.)					

* Percent of protein as-is is provided on the attached APP documentation.

** 18 is the percent of protein when fully hydrated.

*** Creditable amount of APP equals ounces of Dry APP multiplied by the percent of protein as-is divided by 18.

Component Contribution – Grains



Nutrition Facts

Serving Size 1 bar (28g)

Amount Per Serving	
Calories 105	Calories from Fat 30
	% Daily Value*
Total Fat 3g	5%
Saturated Fat 1g	6%
Trans Fat 0g	
Cholesterol 0mg	0%
Sodium 75mg	3%
Total Carbohydrate 17g	6%
Dietary Fiber 1g	4%
Sugars 7g	
Proteins 1g	
Calcium	8%
Iron	2%

Not a significant source of Cholesterol, Vitamin A, Vitamin C

* Percent Daily Values are based on a 2,000 calorie diet. Your Daily Values may be higher or lower depending on your calorie needs.

Whole Grain-Rich Ounce Equivalency (Oz Eq) Requirements for School Meal Programs[1,2] (continued)

GROUP D	OZ EQ FOR GROUP D
• Doughnuts[4] (cake and yeast raised, unfrosted) • Cereal bars, breakfast bars, granola bars[5] (plain) • Muffins (all, except corn) • Sweet roll[6] (unfrosted) • Toaster pastry[7] (unfrosted)	1 oz eq = 55 g or 2.0 oz 3/4 oz eq = 43 g or 1.5 oz 1/2 oz eq = 28 g or 1.0 oz 1/4 oz eq = 14 g or 0.5 oz
GROUP E	**OZ EQ FOR GROUP E**
• Cereal bars, breakfast bars, granola bars[5] (with nuts, dried fruit, and/or chocolate pieces) • Cookies[3] (with nuts, raisins, chocolate pieces and/or fruit purees) • Doughnuts[4] (cake and yeast raised, frosted or glazed) • French toast • Sweet rolls[6] (frosted) • Toaster pastry[7] (frosted)	1 oz eq = 69 g or 2.4 oz 3/4 oz eq = 52 g or 1.8 oz 1/2 oz eq = 35 g or 1.2 oz 1/4 oz eq = 18 g or 0.6 oz

Nutrient Information

Nutrients Per Serving					
Calories	220.32	Saturated Fat	1.34 g	Iron	1.43 mg
Protein	14.33 g	Cholesterol	50.70 mg	Calcium	64.98 mg
Carbohydrate	26.40 g	Vitamin A	3161.50 IU (158.37 RAE)	Sodium	563.78 mg
Total Fat	6.47 g			Dietary Fiber	2.81 g
		Vitamin C	2.56 mg		

Nutrient Information

- Calories
- Saturated Fat
- Trans Fat
- Sodium

Bid Specifications

- Zero trans fat in all items
- Grains
- Low fat or fat-free dairy
- May want to include sodium ranges in bids

Case Study 1

- The school lunch menu says
  - Chicken Fajitas
  - Refried Beans
  - Lettuce & Tomato
  - Fresh Fruit Bar.
- Could this menu meet the meal pattern for Grades 9-12? What documentation would you need to show that?

Case Study 2

- The red-orange vegetables you have planned for the week are:
  - Spaghetti sauce on Tuesday
  - Peas & carrots on Wednesday
  - Tomato with lettuce on a chicken sandwich on Friday
- Is this enough?
- How can you document if it is?

Case Study 3

- Our students would really like to have macaroni & cheese and little smokies, but I tell them that will never happen again with the new sodium and saturated fat standards.
- Is that true? What documentation could help you decide?

Case Study 4

- What documentation would be needed to show that students who choose the salad bar meal are offered all of the required components?

Case Study 5

- How can I document that juice is not over half of the fruit component I offer at breakfast?

Case Study 6

- When we had our administrative review, our consultant found that we were using margarine that contained trans-fat which doesn't meet the nutrient standards and that our buns were not whole grain rich.
- What documentation was missing for that to happen?

QUESTIONS- Need more answers?

Record for answer in the breakout session.

Call your consultant.

Goal-Happy Healthy Students!