

Meal Counting and Claiming



Loria Hunter, Education Specialist II
2023 New Directors' Training
August 2023
ALSDE CNP School Programs



WebEx Recording

[CLICK HERE TO ACCESS THE WEBEX RECORDING](#)

Agenda



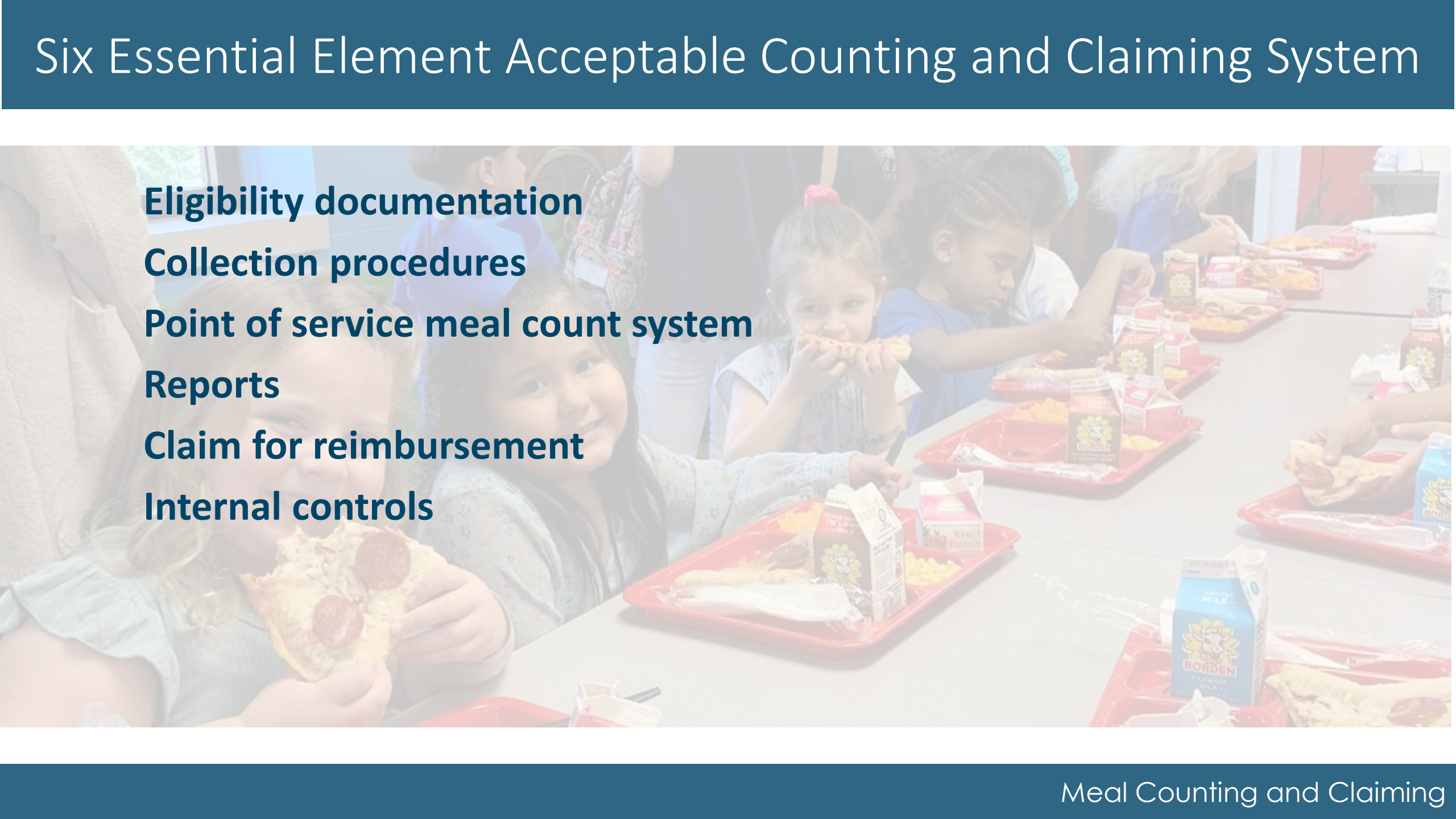
- **August Checklist Review**
Sept Claim
- **Meal Counting**
- **Meal Claiming**
- **Admin Review Basics**
- **School Breakfast and SFSP Outreach**

BREAK *for a* PLATE

SCHOOLS

[illegible]

Six Essential Element Acceptable Counting and Claiming System

A photograph of several young children sitting at a long table in a school cafeteria, eating lunch. They are holding pizza slices and drinking from small cartons of Borden milk. The image is semi-transparent, allowing the text overlay to be visible.

Eligibility documentation
Collection procedures
Point of service meal count system
Reports
Claim for reimbursement
Internal controls

Meal Counting and Claiming



To receive reimbursement:

- System must have adequate supporting documentation on file for meals claimed
- Benefit issuance document should be kept current and always available
- Mechanism must include edit checks

Eligibility Documentation



- **Free and Reduced application**
- **Direct certification**
- **Other source categorically eligible**
 - **Homeless, runaway or foster Lists**

Benefit Issuance Document

- **Must be kept current**
- **Date stamp of enrollment, transfer, withdrawals, and change in approved benefits**



Medium of Exchange



- Takes place at POS
- Benefit issuance is distributed
Ticket, PIN, token, biometric systems
- No overt identification

Point Of Service Meal Count

Point of Service Meal Count – the point in the serving line where it can be determined if a reimbursable meal has been selected.

Key elements:

- **Must meet meal pattern requirements**
- **Accurate meal counting system**
- **Count conducted by trained staff**
- **Meals served outside of cafeteria POS meal count**
- **One reimbursable meal per meal service per day per child**
- **Prepaid meal**
- **Meal Charges**
- **Second Meals**

ACCEPTABLE Meal Counting System

All meal counting and claiming systems must provide an accurate point of service count of the following:

1. Reimbursable Meals – Meet the meal pattern
2. One reimbursable meal per child per meal type
3. Second meals are counted as a la carte or an established meal price

All meal counting and claiming systems must provide an accurate point of service count:

1. By Category
2. Each day for each meal
3. Without revealing student eligibility



UNACCEPTABLE Meal Counting System

- Counts taken in the morning, in the classroom or any other location before the meals is served
- Attendance counts
- Tray or plate counts
- Adults are not paying for their meals or being claimed as reimbursable meals
- Count the number of tickets/tokens **SOLD**
- Count the number of meals paid for in advance
- Use the number of Free and Reduced-Priced eligible students instead of the number of meals actually served

UNACCEPTABLE Meal Counting

- Subtract the count of one category from a total count to obtain another eligibility category count
- Counts taken that make a student's eligibility category obvious.
- Roster System using an outdated roster.
 - Rosters should be printed weekly.
- Counts taken at the beginning of the serving line without checking that the components on the tray count as a reimbursable meal.
- Any count of meals served by category that is not accurate.

Delivery Counts of Meals

- The number of meals delivered to a school is not necessarily the number of meals actually served.
- The number of snacks prepared for after-school snack program is not necessarily the number of snacks actually served.

Daily Edit Check

To perform daily meal count edit checks, LEAs must:

- multiply the number of enrolled children approved in each category (free, reduced, and paid) by the attendance factor (AF).
- compare these numbers, known as attendance adjusted eligible figures, to the daily counts of free, reduced-price, and paid meals served
- document your calculations on an edit check form.
- if counts exceed the attendance-adjusted number, provide a written justification on the edit check form next to each applicable date

LEAs must retain:

- All meal count records
- Eligibility documents
- Rosters
- Edit Checks
- Site monitoring forms
- Claims for reimbursement

Provision 2 – base year documents

CEP – DC file to support ISP

What is Meal Claiming?



- Daily Counts taken at each school site.
- Monthly counts for individual school site consolidated.
- Monthly Meal counts for all school sites sent to district office.
- District office sends consolidated and verified meal counts by school site, electronically to state department.
- State Department validates totals and issues a reimbursement check to district.



Administrative Review (AR) Basics

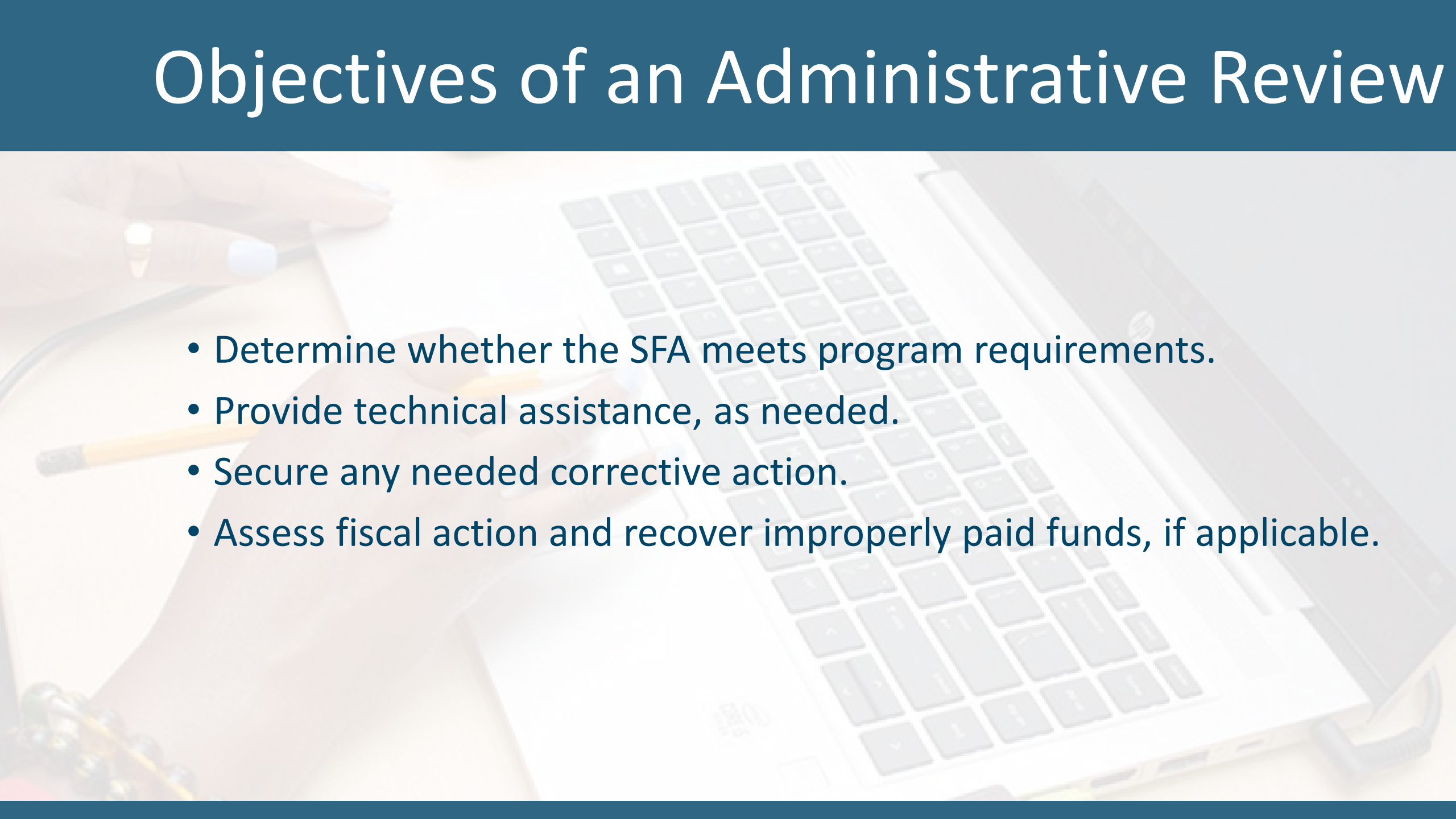


Loria Hunter, Education Specialist II
August 2023
New Director's Webinar #3



BREAK for a PLATE
ALABAMA

Objectives of an Administrative Review

- 
- Determine whether the SFA meets program requirements.
 - Provide technical assistance, as needed.
 - Secure any needed corrective action.
 - Assess fiscal action and recover improperly paid funds, if applicable.

Key Areas of the Admin Review

- Meal Access and Reimbursement
- Meal Pattern and Nutrition Integrity
- Resource Management – Review designed to capture information from the SFA about its financial operations.
- General Program Compliance
- Other Federal Program Reviews *(Afterschool Snack Program, SSO, FFVP, and Special Milk Program, if applicable)*
- Special Provision Options *(CEP or Provisions 1-3, if applicable)*

Administrative Review Cycle



Food and Nutrition Service
U.S. DEPARTMENT OF AGRICULTURE

HOME

PROGRAMS

DATA & RESEARCH

FUNDING

NEWSROOM

RESOURCES

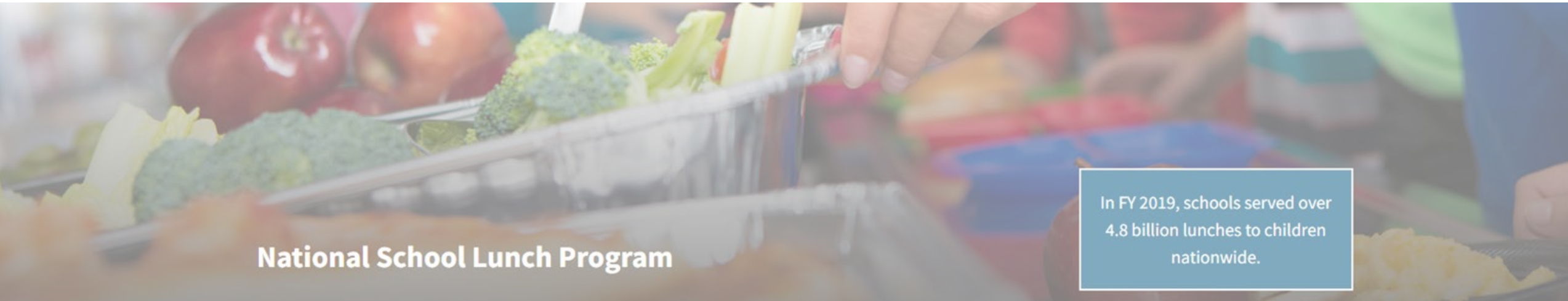
OUR AGENCY

- State agencies must conduct an AR for all SFAs participating in the school meals programs.
- Five (5) year review cycle *(ALSDE has a waiver that allows an AR of all SFAs once every five (5) years.)*

National School Lunch Program

Admin Review Schedule and SFA Notification

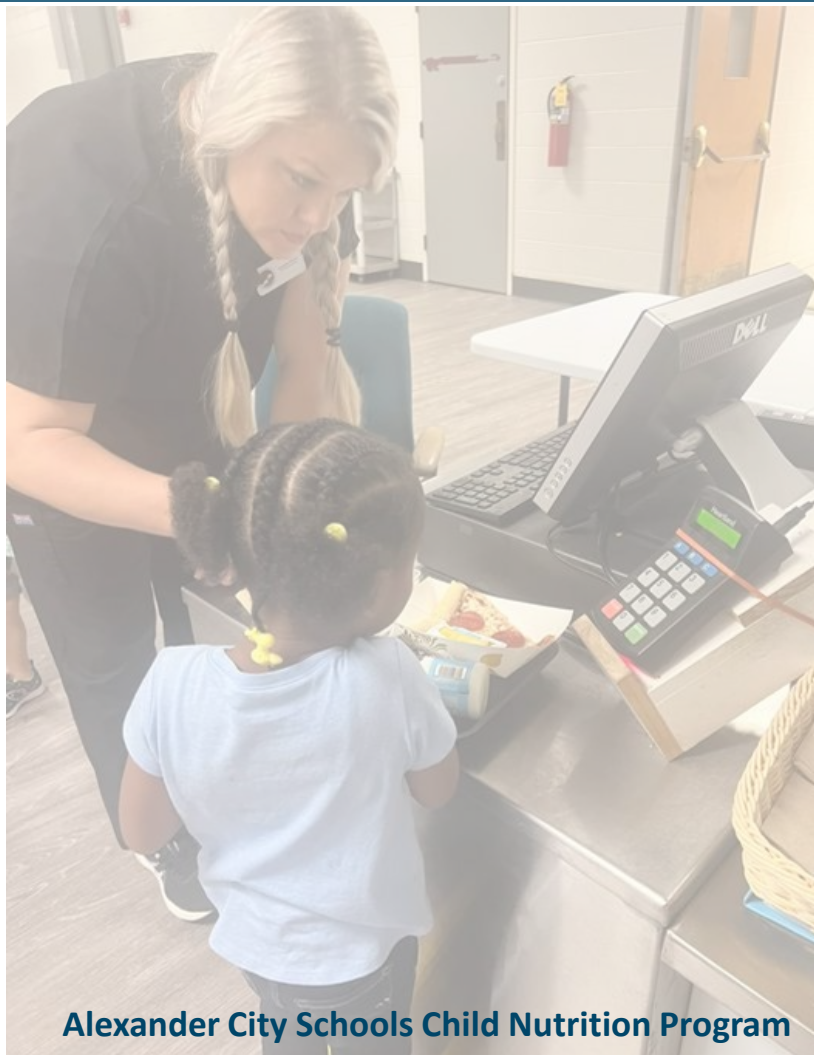
- Schedule is released by the SA at the beginning of the school year.
- AR training will be scheduled for all SFAs selected for review.
- AR lead reviewer will contact the SFA with dates of review and documents needed.



National School Lunch Program

In FY 2019, schools served over
4.8 billion lunches to children
nationwide.

Days of Review vs. Review Period



Alexander City Schools Child Nutrition Program

Day(s) of Review:

- The day(s) the SA conducts the on-site review of the individual sites selected for review.

Review Period:

- The review period is the most recent month for which a Claim for Reimbursement was submitted and paid, provided that it covers at least ten (10) operating days.

Prior to the Administrative Review



- SFAs must submit the required documentation prior to the review.
- Lead Reviewer will send a letter detailing documents needed and submission process via email.

Alexander City Schools Child Nutrition Program

Meal Access and Reimbursement



Primary Goals

1. Determine if meal benefits are being provided to eligible children.
2. Ensure meals are served, counted, recorded, consolidated, and reported accurately.
3. System that consistently yields correct claims.

Meal Access and Reimbursement



- Certification and Benefit Issuance
- Verification
- Meal Counting and Claiming

Aggie Nutrition -Albertville City Schools CNP

Certification and Benefit Issuance

Certification:

The determination of a student's meal benefit eligibility using a household application, direct certification or evidence of other categorically eligible status.

Benefit Issuance:

The method by which the program ensures students receive their appropriate meal benefit at the point of service.

Certification and Benefit Issuance Documentation

- Direct Certification (DC) List
- Free/Reduced Meal Applications
- Homeless/Runaway/Foster List
- Point of Sales (POS) Roster

Meal Counting and Claiming



Meal Pattern and Nutrition Quality



Primary Goal . . .

To ensure meals claimed for reimbursement contain appropriate meal components and quantities.

Meal Components and Quantities

SA will review one week menu.

- ❖ Menu Worksheet documentation must be complete for
 - Menu type
 - Age/grade group
- ❖ Production Records
- ❖ Standardized Recipes
- ❖ CN Labels
- ❖ Nutrition Facts
- ❖ Product Formulation Sheets
- ❖ USDA Food Fact Sheets



Elmore County Child Nutrition

Meal Component Compliance and Documentation Tools

USDA United States Department of Agriculture

Simplified Directions for Lunch Menu worksheet

3/11/2022

Getting Started

REMEMBER TO PERIODICALLY SAVE THE WORKSHEET AS IT IS BEING COMPLETED!!!!

Materials needed:

- 1 week menu (5 days)
- Portion sizes for all reimbursable menu items
- Contribution information for each menu item (CN Label, USDA Food Fact Sheet)
- Standardized Recipes
- Production Records

[Click here for Team Nutrition resources like the Food Buying Guide](#)
[Click here to go to the Food Buying Guide Calculator](#)

Complete a Menu worksheet for the grade groups (K-5, 6-8, and 9-12) as appropriate. Separate Menu worksheets have been developed for breakfast and lunch.

Each Excel file has twelve tabs including the Simplified Nutrient Assessment (and two instruction pages).
 The name of each tab is located at the bottom of the workbook.
 Click on the tab at the bottom of each tab to transfer to a different tab.
 ***It is very important to follow these steps in order; otherwise, the worksheet will not provide accurate results. The accuracy of the menu certification results are based on the accuracy of the information entered by the user.

Crediting Considerations

- Some vegetables and fruits do not credit on a volume as served basis (e.g. 1 cup credits as 1 cup)
- Tomato paste - refer to manufacturing information
- Dried fruit- twice the volume as served (1/2 cup credits as 1 cup)
- Raw leafy greens- half the volume as served (2 cups credits as 1 cup)

Conversion must be made first, and CREDITABLE amounts entered into the menu worksheet.
 Example: if a salad with 2 cups of romaine lettuce is offered, "1" cup of vegetable (dark green) must be entered.

SFA Notes

This tab is for SFAs to provide notes and any additional information the State agency may instruct to include

[Entering Meals into the "All Meals" Spreadsheet \(column 1\)](#)

Alternatives to the USDA Certification Worksheets

Cartewheel, a LINQ Solution LINQ, Inc. Phone: 800-541-8999 *Cartewheel will no longer be approved as of 7/1/2023	CNCentral (former name: inTEAM Menu Compliance Tool+) inTEAM Associates, LLC Phone: 866-457-4705	eTriton Harris School Solutions Phone: 1-716-402-2492
Health-e Meal Planner Water Walkers, Inc. dba Health-e Pro Phone: 800-838-4856 x5	MCS Edison Menus & Inventory Heartland School Solutions Phone: 888-287-6416	Meals Plus, a LINQ Solution (desktop version) LINQ, Inc. Phone: 800-541-8999
Meals Plus, a LINQ Solution (web version) LINQ, Inc. Phone: 800-541-8999	Mosaic Menu Planning Heartland School Solutions Phone: 800-724-9853	NetMenu CBORD Phone: 844-462-2673
NUTRIKIDS: Menu Planning & Nutritional Analysis Heartland School Solutions Phone: 800-724-9853	OneSource- Menu Planning and Nutrient Analysis Horizon Software, LLC Phone: 800-741-7100	PRIMA Web Aramark Phone 215-238-3000
PrimeroEdge - Menu Planning Module Cybersoft Technologies, Inc. Phone: 866-510-2525	SchoolCafé Menu Planning & Nutritional Analysis Cybersoft Technologies, Inc. Phone: 866-510-2525	TITAN, a LINQ Solution LINQ, Inc. Phone: 800-541-8999
TrakNOW - Nutrition & Inventory PCS Revenue Control Systems, Inc. Phone 800-247-3061	WebSMARTT Menu Planning & Production Heartland School Solutions Phone: 800-423-2113	Webtrition Chartwells K12 Phone: 877-586-9631
Webtrition MenuWorks Chartwells K12 Phone: 877-586-9631		

Dietary Specifications and Nutrient Analysis

Assessment Tools

Off Site Assessment Tool encompasses questions about and requests information with regard to several of the monitoring areas of the AR including dietary specifications and nutrition.

Meal Compliance Risk Assessment Tool is completed for each site selected for review. School/site with the highest score is most error prone and must be selected for a targeted menu review.

Dietary Specifications Assessment Tool captures information about operational and menu planning practices of the SFA. This helps to determine the risk of violations related to calories, saturated fat, sodium and trans fat.

Meal Pattern and Nutrition Integrity



Tips for Success

- Communicate with lead reviewer.
- Respond in a timely manner to documentation submission.
- Keep an electronic or hardcopy notebook of AR materials.
- Make support staff available during onsite visit.
- Complete corrective action thoroughly and in a timely manner



SBP Outreach

- Policy Memo SP 40-2011
- Research has shown that starting the day with a nutritious breakfast helps students stay alert and perform better in school.
- SFA must inform eligible families of the availability of the SBP.
- Notification must be relayed just prior to or at the beginning of the school year.
- Ideally, schools send multiple reminders throughout the school year.
- Types of outreach
 - Informational packets w/ meal application
 - Public address systems
 - Printed or electronic material to families and students

SFSP Outreach

Policy Memo SFSP 04-2011, SP 15-2011

- SFAs inform families of the availability and location of free meals for students when the regular school year ends.
- Activities
 - Developing and disseminating printed or electronic materials to families with school age children
 - SFSP Outreach Toolkit for Sponsors and Feeding Sites

Resources

USDA Approved Certification of Compliance Tools and Software

- <https://www.fns.usda.gov/tn/usda-approved-certification-compliance-tools-and-software>

Certification of Compliance Worksheets: 5-Day Schedule

- <https://www.fns.usda.gov/cn/certification-compliance-worksheets-5-day-schedule>

Administrative Review Guidance and Tools

- <https://www.fns.usda.gov/nslp/administrative-review-guidance-and-tools>

School Breakfast Toolkit

- <https://www.fns.usda.gov/introduction-1>

Summer Food Toolkit

- <https://www.fns.usda.gov/tn/summer-food-summer-moves>

Questions

- cnpslp@alsde.edu
- Email: loria.hunter@alsde.edu

Subject Line: New Director August
Webinar Question

Remember: Questions and
answers will be compiled and
shared via email.



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*This language was added pursuant to the May 5, 2022, USDA memorandum. However, the inclusion and applicability of this language is currently under challenge in the matter of *The State of Tennessee, et al. v. USDA, et al.*, Case No. 3:22-cv-00257, and may be subject to change.