STRATEGIES *for* SUCCESS During a Remote AR

Melissa Manning, RDN
Jennifer McNeil, RDN, SNS
Mickinzie Lopez, MS, RDN, SNS

My School RD LunchAssist

My School RD
Nutritionals Made Easy

Team:

Melissa Manning, RDN

Christine Penrose, RDN

Quick Stats:

1998 | First School Contract
3 | Years at CDE
12 | Avg Audits Per Yr
21 | Clients in 2019
180,000 | Students Served
21 | Years Consulting with my Longest Client

One-on-one Support with:

Menu Planning and Analysis

NSLP/CACFP Administrative Reviews

Special Diets

Product Development/PFS

Individualized Training

Dietetic Internship Advisory Board, CSULB & Preceptor for 7 Internships

Digital Nomad

Kitten Fosterer

Mother of 2

LunchAssist

LunchAssist Community

- Monthly Community Calls
- Newsletter

LunchAssist PRO

- 12-hours Professional Development
- Spanish Resources & Training
- *The Collective*

Administrative Review Boot Camp

- Tools, templates and training for AR success

Customized Coaching & Consulting

- Individualized 1:1 support

www.lunchassist.org/join

Team:

Jennifer McNeil, RDN, SNS

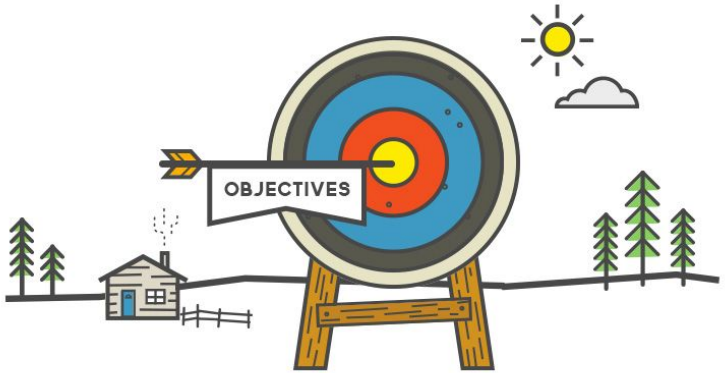
Mickinzie Lopez, MS, RDN, SNS

Paloma Perez Bertrand, MPA


THANK YOU
TO OUR HEROES!
LunchAssist

Agenda

1. Timeline
2. Off-site Assessment
3. Menu Compliance
4. Virtual On-Site Visit
5. Strategies for Success
6. Resources
7. Discussion (Q & A)



My School RD LunchAssist

1.

TIMELINE

My School RD LunchAssist

Administrative Review **Timeline**

Fall	8 Weeks Prior to Review	Month of Review	Date of Review	30 Days After Review
Confirm Dates & Details	**Off-site Assessment Tool**	**Week of Menus + Most Recent Claim**	**Virtual On-site Review**	**Corrective Action Due**
The **Month of Review** is the most recent month for which claims have been submitted prior to the On-site Review. **What's best for you?**	Complete and submit **8 weeks prior** to AR Entrance.	During the month of review on week of **menu** compliance will be assessed. The **meal counts and claim** will also be reviewed for this month.	The virtual AR **begins**. The auditor will be completing a virtual site visit, checking claims and menu documentation from the month of review, and reviewing additional program records.	The Exit Conference will conclude the Auditor's **visit**. Once corrective actions are posted in Edge, responses are due within **30 days**.

2.

OFF-SITE ASSESSMENT

My School RD LunchAssist

OAT

- 75+ Questions
- 30+ Attachments

➔ **Downloadable Resource**

SNP Administrative Review Off-Site Assessment (OAT)

CHECKLIST

LunchAssist

Benefit Issuance

- ☐ Blank Meal Application
- ☐ Approval & Denial Letter for Free and Reduced-Price Meals
- ☐ Direct Certification Notification Letters for Free and Reduced-Price Meals
- ☐ Meal Count & Collection Procedures

Meal Counting

- ☐ Procedures for Meals Served Outside of the Cafeteria
- ☐ Meal Charge Policy
- ☐ Copy of Notice Sent to Families or Posted Online about the Meal Charge Policy

Resource Management

- ☐ Unaudited Actuals for SY 19-20
- ☐ Net Cash Resources Calculator
- ☐ Copy of Budget Agreement (if Applicable)
- ☐ List of Equipment Purchased > $5,000 during SY 19-20
- ☐ Internal Control Procedures for Fund 13
- ☐ Paid Lunch Equity Tool for SY 19-20 & 20-21
- ☐ Non-Program Food Revenue Tool
- ☐ Indirect Cost Rate Worksheet Form ICR

Verification

- ☐ Verification Policy & Procedure
- ☐ FNS-742 Verification Collection Report

My School RD LunchAssist

OAT: Civil Rights

- Policies & Procedures
- Evidence of Training

Take this training for free at www.lunchassist.org

LunchAssist PRO

OAT: Local School Wellness Policy

- Update Wellness Policy
- Stakeholder Involvement
- Triennial Assessment

OAT: Breakfast & Summer Outreach

My School RD LunchAssist

OAT: Resource Management

- Based on SY 19-20
  - Net Cash Resources
    - Budget Agreement
    - Spending Plan
  - Internal Control Procedures
  - Non-program Foods

Administrative Review Boot Camp

LunchAssist

3.

MENU COMPLIANCE

My School RD LunchAssist

Menus: Documentation

- Calendar Menu for Month of Review
  - Detailed Week of Review Menu
- CN Labels & Product Formulation Statements
- Recipes
- Menu Production Records
- Certification of Compliance Worksheets
- Meal Pattern Waivers

My School RD LunchAssist

Dietary Specifications Assessment Tool

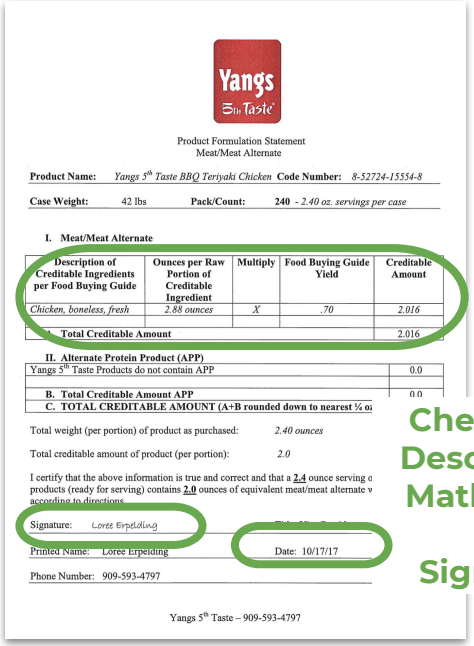
- Assesses risk of violations for nutritional requirements
- Applies to school site(s) of focus
- Rate each prompt between 1 - *always*, and 4 - *never*
- Determines if a nutrient analysis needs to be run

Menus: Documentation

- Coosing a week of review
  - Avoid holidays, partial weeks, and odd weeks
  - Keep things simple. Avoid heavy prep
  - Week of production vs traditional week
- Bulk Meal Service:
  - List of Ingredients
  - Suggest meals for each day
  - Calculate servings for bulk foods
  - USDA Non-discrimination? Food safety guidelines? Preparation & heating instructions?

My School RD LunchAssist

Menus: CN Labels & PFS



Check FBG Description, Math, Date, & Signature

My School RD LunchAssist

Menus: Recipes

- Use for complex items (>1 ingredient)
- Required elements:
  - Title
  - HACCP Category
  - Ingredients & Amounts
  - Yield & Portion Size
  - Directions, emphasizing portioning
  - Meal Pattern Contribution
- Ensure accurate crediting

My School RD LunchAssist

Menus: Production Records

- ➔ Complete All Sections
- ➔ Check for Crediting & Serving Sizes
- ➔ Check that Enough F & V were Served

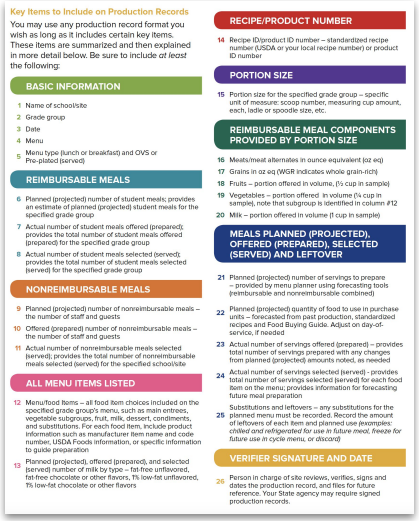
Emergency Feeding Menu Production Record

Site: Calimesa Elementary School **Date:** 10/21/2020 **Meals:** Snack, 7 day kit, ages 6-18

Total Reimbursable Kits Planned: 750 **Total Kits Served:** _____

			Min Meal Pattern Contribution Per Bag											
Snack Item Description:	**Amount per Bag**	**Amt per Serving**	**M/MA Oz Eq**	**Grain Oz Eq**	**Fruit Cup**	**Veg Cup**	**Milk Cup**	**Time / Temp Prep 1**	**Time / Temp Prep 2**	**Time / Temp Service**	**Planned Qty.**	**Prepared Qty.**	**Leftover Qty.**	**Served Qty.**
Scooby Doo Grahams	1 package	1 package		1 oz WG							775 each			
Multigrain Cheerios Bowlpack	1 package	1 package		1 oz WG							775 each			
Cheez-Its	1 package	1 package		1 oz WG							775 each			
Chocolate Belly Bears	1 package	1 package		1 oz WG							775 each			
Savory Herb Crackers	1	1		1 oz							775 each			

- ➔ Downloadable Resource



Key Items to Include on Production Records

You may use any production record format you wish as long as it includes certain key items. These items are summarized and then explained in more detail below. Be sure to include *at least* the following:

BASIC INFORMATION

1 Name of school/site
2 Grade group
3 Date
4 Menu
5 Menu type (lunch or breakfast) and OVS or Pre-plated (served)

REIMBURSABLE MEALS

6 Planned (projected) number of student meals; provides an estimate of planned (projected) student meals for the specified grade group
7 Actual number of student meals offered (prepared); provides the total number of student meals offered (prepared) for the specified grade group
8 Actual number of student meals selected (served); provides the total number of student meals selected (served) for the specified grade group

NONREIMBURSABLE MEALS

9 Planned (projected) number of nonreimbursable meals – the number of staff and guests
10 Offered (prepared) number of nonreimbursable meals – the number of staff and guests
11 Actual number of nonreimbursable meals selected (served); provides the total number of nonreimbursable meals selected (served) for the specified school/site

ALL MENU ITEMS LISTED

12 Menu/food Items – all food item choices included on the specified grade group's menu, such as main entrees, vegetable subgroups, fruit, milk, dessert, condiments, and substitutions. For each food item, include product information such as manufacturer item name and code number, USDA Foods information, or specific information to guide preparation
13 Planned (projected), offered (prepared), and selected (served) number of milk by type – fat-free unflavored, fat-free chocolate or other flavors, 1% low-fat unflavored, 1% low-fat chocolate or other flavors

RECIPE/PRODUCT NUMBER

14 Recipe ID/product ID number – standardized recipe number (USDA or your local recipe number) or product ID number

PORTION SIZE

15 Portion size for the specified grade group – specific unit of measure: scoop number, measuring cup amount, each, ladle or spoodle size, etc.

REIMBURSABLE MEAL COMPONENTS PROVIDED BY PORTION SIZE

16 Meats/meat alternates in ounce equivalent (oz eq)
17 Grains in oz eq (WGR indicates whole grain-rich)
18 Fruits – portion offered in volume, (½ cup in sample)
19 Vegetables – portion offered in volume (¼ cup in sample), note that subgroup is identified in column #12
20 Milk – portion offered in volume (1 cup in sample)

MEALS PLANNED (PROJECTED), OFFERED (PREPARED), SELECTED (SERVED) AND LEFTOVER

21 Planned (projected) number of servings to prepare – provided by menu planner using forecasting tools (reimbursable and nonreimbursable combined)
22 Planned (projected) quantity of food to use in purchase units – forecasted from past production, standardized recipes and Food Buying Guide. Adjust on day-of-service, if needed
23 Actual number of servings offered (prepared) – provides total number of servings prepared with any changes from planned (projected) amounts noted, as needed
24 Actual number of servings selected (served) - provides total number of servings selected (served) for each food item on the menu; provides information for forecasting future meal preparation
25 Substitutions and leftovers – any substitutions for the planned menu must be recorded. Record the amount of leftovers of each item and planned use *(examples: chilled and refrigerated for use in future meal; freeze for future use in cycle menu, or discard)*

VERIFIER SIGNATURE AND DATE

26 Person in charge of site reviews, verifies, signs and dates the production record, and files for future reference. Your State agency may require signed production records.

My School RD LunchAssist

Menus: USDA Cert of Compliance Worksheet

Daily Requirement Summary Breakfast, Grades K-5								
Go to instructions	Monday	Tuesday	Wednesday	Thursday	Friday	Weekly Total	Weekly Requirement (cups)	Weekly Requirement Check
Fruit, Vegetable, Fruit Juice or Vegetable Juice Servings	1/2	1/2	1/2	1/2	1/2	2 1/2	5	No
	Monday	Tuesday	Wednesday	Thursday	Friday	Weekly Total	Weekly Requirement (oz equivalents)	Weekly Requirement Check
Minimum Grain	2.00	4.00	2.00	2.00	2.00	12.00	7	Yes
Maximum Grain	2.00	4.00	2.00	2.00	2.00	12.00	10	No

Waivers?
If YES,
Red is OK

Grain and M/MA
Maximum: Red is OK

My School RD LunchAssist

Menus: Meal Pattern Waiver

- Documentation of reason for waiver
- Confirmation of **approval**
- Compare approval with menu compliance report

4.

VIRTUAL ON-SITE REVIEW

My School RD LunchAssist

On-site Review

- Virtual Site Visit
- Special Diets
- Food Safety
- Buy American
- Smart Snacks
- Site Monitoring
- Professional Standards
- Meal Counts & Claims
- Applications & Verification

My School RD LunchAssist

On-site Review: Virtual Site Visit

My School RD LunchAssist

On-site Review: Virtual Site Visit

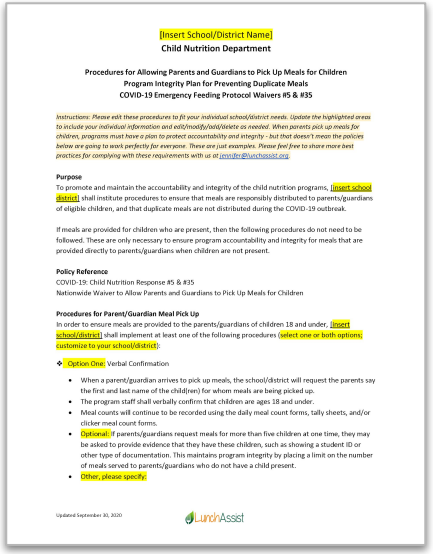
- Signage:
  - “And Justice for All”
  - Offer vs Serve Poster
  - Wellness Policy
  - Health Permit
  - Health Inspection

My School RD LunchAssist

On-site Review: Virtual Site Visit

- Paperwork
  - Meal Count & Collection Procedures *
  - Parent Meal Pick Up Policy

➔ **Downloadable Resource**



[Insert School/District Name]
Child Nutrition Department

Procedures for Allowing Parents and Guardians to Pick Up Meals for Children
Program Integrity Plan for Preventing Duplicate Meals
COVID-19 Emergency Feeding Protocol Waivers #5 & #35

Instructions: Please edit these procedures to fit your individual school/district needs. Update the highlighted areas to include your individual information and edit/modify/add/delete as needed. When parents pick up meals for children, programs must have a plan to protect accountability and integrity - but that doesn't mean the policies below are going to work perfectly for everyone. These are just examples. Please feel free to share more best practices for complying with these requirements with us at jennifer@lunchassist.org

Purpose
To promote and maintain the accountability and integrity of the child nutrition programs, [insert school district] shall institute procedures to ensure that meals are responsibly distributed to parents/guardians of eligible children, and that duplicate meals are not distributed during the COVID-19 outbreak.

If meals are provided for children who are present, then the following procedures do not need to be followed. These are only necessary to ensure program accountability and integrity for meals that are provided directly to parents/guardians when children are not present.

Policy Reference
COVID-19: Child Nutrition Response #5 & #35
Nationwide Waiver to Allow Parents and Guardians to Pick Up Meals for Children

Procedures for Parent/Guardian Meal Pick Up
In order to ensure meals are provided to the parents/guardians of children 18 and under, [insert school/district] shall implement at least one of the following procedures (select one or both options; customize to your school/district):

❖ Option One: Verbal Confirmation

- When a parent/guardian arrives to pick up meals, the school/district will request the parents say the first and last name of the child(ren) for whom meals are being picked up.
- The program staff shall verbally confirm that children are ages 18 and under.
- Meal counts will continue to be recorded using the daily meal count forms, tally sheets, and/or clicker meal count forms.
- Optional: If parents/guardians request meals for more than five children at one time, they may be asked to provide evidence that they have these children, such as showing a student ID or other type of documentation. This maintains program integrity by placing a limit on the number of meals served to parents/guardians who do not have a child present.
- Other, please specify:

Updated September 30, 2020 LunchAssist

*Updated for COVID-19 and available on LunchAssist PRO

My School RD LunchAssist

On-site Review: Meal Counts & Claims

- Electronic Copies of:
  - Reimbursement Claim
  - Meal Counts
    - POS Reports
    - Tally Sheets
    - Rosters

On-site Review: Food Safety

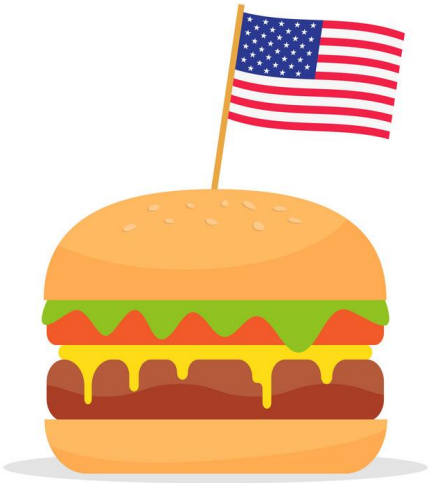
- HACCP Plan *
- Temperature Logs
- Food Safety Manager Certificates
- Health Permit
- Health Inspection Report

*Updated for COVID-19 and available on LunchAssist PRO

My School RD LunchAssist

On-site Review: Buy American

- Virtual Store Room Inspection
  - Buy American Waivers
    - Bananas, Pineapple, etc.
  - Evidence for Domestic Products
  - Follow-up on Inconclusive Items
- Bid Documents



My School RD LunchAssist

On-site Review: Special Diets

My School RD LunchAssist

5.

STRATEGIES *for* SUCCESS

My School RD LunchAssist

Electronic File Management

The goal of electronic file management is to ensure that you can find what you're looking for, even if you're looking for it years after it's creation.

Susan Ward, *The Balance*

My School RD LunchAssist

Electronic File Management

- Organization is key
- Folders are the computer's filing cabinets
- File Naming
  - Be specific!
  - Short and descriptive (<25 letters)
  - Add a date

ex: *MPR, School Name, Oct 2020.pdf*

My School RD LunchAssist

Folder Structure

- SY 20-21 NSLP AR
  - Off-site Assessment
  - Menu Compliance Documents
    - Breakfast
      - Production Records
      - Recipes
      - CN Labels & PFS

Add miscellaneous documents (waiver, calendar menu, etc.)

My School RD LunchAssist

Folder Structure

- On-site Review
  - Meal Counts & Claims
  - Applications & Verification
  - Special Diets
  - Site Monitoring
  - Smart Snacks
  - Professional Standards
  - Food Safety
  - Buy American

Virtual Communication

My School RD LunchAssist

General Tips for Success

- Review previous AR to avoid repeat findings
- Utilize checklists
- Prepare in advance
- Re-train school-site staff
    - Menu Production Records
    - Meal Counting Forms
- Provide only what is requested
- Proofread all documents before submission

My School RD LunchAssist

6.
RESOURCES

Helpful Tools We Love!

My School RD LunchAssist

AR Resources

- Checklists - **See handouts**!
- COVID-19 Waivers
- USDA AR Manual
- State Agency Training and Guidance
- LunchAssist Resources
    - LunchAssist PRO
    - Administrative Review Boot Camp

My School RD LunchAssist

Community of Practice Call

COVID-19 Emergency Food Service

➔ **Join us the first Thursday of each month!**

https://zoom.us/meeting/register/upYtde-uqTIp5W3YWMxHDzNjEWcAj6n7Fg

LunchAssist

CENTER FOR ECOLITERACY

CALIFORNIA FOOD FOR CALIFORNIA KIDS®

LunchAssist

Membership AR Prep Consulting Civil Rights COVID-19 LunchAssist PRO

A Community for School Nutrition Professionals

Everything you need, all in one place

Join the Community

LunchAssist PRO

SY 20-21 Professional Development *and* The Collective

Administrative Review Boot Camp

LunchAssist

7.
DISCUSSION

My School RD LunchAssist

Get in Touch!

Jennifer McNeil, RDN, SNS
jennifer@lunchassist.org
www.lunchassist.org

Melissa Manning, RD
melissa@myschoolrd.com
www.myschoolrd.com

Visit our Virtual Booth!