

School Food Service Site Monitoring Worksheet For School Lunch and Breakfast Programs

Complete this form by Feb 1st,
each year and for each site.
[USDA Policy memo SP56-2016os](#)

*Assessing the Meal Counting and Claiming System of the Cafeteria and Administrative Office
and reviewing General Program Areas.*

Per 7 CFR 210.8(a)(1) and 7 CFR 220.11(d)(1), every year, schools with more than one site must conduct at least one on-site self-review of all sites operating the National School Lunch Program and at least 50% of the breakfast programs. Each breakfast program must be reviewed at least every two years. The on-site review must ensure that the school's monthly claim for federal reimbursement is based on the counting and claiming system and yields the actual number of reimbursable meals for each eligibility category served for each day of operation.

If the review discloses any issues in compliance, the SFA must ensure that the site implements corrective action and conducts a follow-up on-site review within 45 days of the review to determine that the corrective action has been implemented and the problem resolved.

Site Name:	Review Date (Breakfast):	Breakfast		Lunch	
Reviewer Name:	Review Date (Lunch, if different):	Yes	No	Yes	No

- Does the method used for counting reimbursable meals follow the approved point of service requirement at all stations? (Circle the method of Meal Counting Used):
Coded Ticket By-name Roster Electronic POS Head/Tally Count Sheets Other: _____
- Is the point-of-service count located at the end of the service line after all meal components have been served?
If not, has the State Agency (ND DPI-CNFD) approved the location of the point of service?
(Approval must be recorded in ND Foods on the Meal Counting and Claim Preparation document.)
- Are meals served in an alternate location (i.e., preschool classroom, grab and go kiosk, etc.) ☐ No Alternate point
If so, is an accurate point-of-service meal counting system in place? ☐ N/A
- Are there backup procedures for meal counting and claiming when the primary system is not available?
- Are the staff responsible for point-of-service meal counts trained to identify a reimbursable meal from a non-reimbursable meal (i.e., meals not meeting the meal pattern, seconds, adult meals, etc.) at least annually?
Name of staff member taking meal count: _____ Date Trained: _____
Name of substitute/backup monitor: _____ Date Trained: _____
- Is the school and point-of-service staff correctly implementing the policies for: (Check all that apply)
☐ Offer vs serve ☐ Lost tickets/forgotten PIN numbers ☐ A la carte items ☐ Second meals
☐ Field trips ☐ Adult & non-student meals ☐ Visiting student meals ☐ Unpaid meal charge
- Record today's meal counts by eligibility and compare them with the total number of students eligible for each category.

Breakfast			Lunch		
	Students Eligible	Meal Count		Students Eligible	Meal Count
Free			Free		
Reduced-Price			Reduced-Price		
State Free (225%)			State Free (225%)		
Paid			Paid		

- Does the point-of-service system ensure that students' eligibility statuses are kept confidential?
- Are procedures such as edit checks using an attendance factor and meal counts compared to total daily enrollment used to ensure that daily meal counts do not exceed the number of students eligible or in attendance?
- If meal claims are combined from two or more sites, is there a process to ensure meal counts are correctly totaled and consolidated? ☐ NA- claims are not combined

Note: The following three questions are for all schools EXCEPT those using Provision 1, 2, or 3 in non-base years, CEP, or RCCLs with only residential children.

- Are direct certification systems reviewed to ensure students' eligibility is applied in a timely manner, at a minimum, at the beginning of the school year, and at both 3 and 6 months after the initial review?
- Is an eligibility list kept up to date and used by the point-of-service system to provide an accurate daily count of reimbursable meals by category (free, reduced, state-free, paid)?
- Are the correct Free/Reduced Price eligibility processes, including notification and verification, followed?

Meal Counting & Claiming Corrective Action Plan. For any "No" answers from above, identify how the area will be brought into compliance.

GENERAL OBSERVABLE AREAS		Breakfast		Lunch	
		Yes	No	Yes	No
1.	Resource Management: Does the school maintain a separate Nonprofit School Food Service Account?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Are student meal prices set to reflect paid lunch equity? <input type="checkbox"/> N/A- CEP/Provision/RCCI	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Are adult meal prices set at the required levels above the highest student meal price?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Does revenue from Nonprogram foods, including adult meals, second milk, and a la carte, cover expenses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	If indirect costs are paid by the school food service account, is there documentation of the approved rate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Are records to support the claim for reimbursement (i.e., production records, meal count forms, etc.) kept for at least 3 years plus the current year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	Civil Rights: Is the most recent 'And Justice for All' poster visible in a public location?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Do program materials, including the district website, include the most current USDA nondiscrimination statement?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Have site staff completed Civil Rights training for the Child Nutrition programs this year? Date: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Were all meals served regardless of race, color, national origin, sex, age, disability, or reprisal?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Do Limited English Proficient families have access to translated Program documents, including meal applications?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	For meal modifications that fall outside of the meal pattern due to a food intolerance or disability, is a signed medical statement on file?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Meal Pattern: Does today's menu meet the meal pattern requirements? (Check all that apply)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	___ Pre-K ___ K-5 ___ K-8 ___ K-12 ___ 6-8 ___ 9-12 Other: _____				
	Are production records being accurately and fully completed with the required information to reflect the menus that are planned and served?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Is signage identifying a reimbursable meal posted at the beginning of the meal service line?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	If Offer versus Serve is implemented, are students required to select at least ½ cup of fruit or vegetables?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Is water available free of charge but not promoted as part of the meal in the meal service area?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	Food Safety: Is the most recent health inspection report posted in a location visible to the public and students?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Are temperature logs being kept up to date on all refrigeration and sanitation equipment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Is the Food Safety plan implemented, and is a written copy available in the kitchen?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	Local Wellness Policy: Is the district's Local School Wellness Policy (LWP) up-to-date?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Is the policy and most current assessment available to the public, such as posted on the school website?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Has an assessment of how well the school is meeting the LWP goals been done in the last three years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Does the school follow Smart Snack nutrition standards? (for a la carte, vending machines, school stores, fundraisers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.	Professional Standards: Is a training log completed for each site staff member to document meeting Professional Standards and training requirements by the end of the school year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.	Procurement: Has at least one staff member completed Procurement training this year? Date: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.	Outreach: Are families informed about the availability of School Breakfast (SBP)? <input type="checkbox"/> N/A- Breakfast not offered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Are families informed about how to find sites offering Summer Food Service Programs (SFSP) each year?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Observable Areas Corrective Action Plan: For any "No" answers from above, identify how the area will be brought into compliance.					

Date Corrective Action(s) will be implemented by: and by whom:	Follow-up Visit Date: (Must be within 45 days if corrective action is required.)	Was corrective action implemented and successful in resolving identified issues?	Breakfast			Lunch		
			Yes	No	N/A	Yes	No	N/A

Signature of school/site food service manager	Title	Date
Signature of reviewer	Title	Date