

## School Nutrition Program Responsibility Checklist

Please use this list to determine who is responsible for each area of your Child Nutrition Program(s) (CNP).

|   | <b>Task and Responsibilities</b>   | <b>Date</b>                       | <b>Name of Person Responsible</b> |
|---|--|-----------------------------------|-----------------------------------|
| 1 | <p><b>Online Application Renewal</b></p> <ul style="list-style-type: none"> <li>• In the Child Nutrition Payment and Information System (CNIPS) submit online renewal <b>each year</b> prior to the beginning of the school year</li> <li>• Make changes to the online application as necessary throughout the school year</li> <li>• Ensure current vendor contract, Food Service Management Company (FSMC) contract, or joint agreement has been submitted to Nutrition Services Division (NSD), if applicable</li> </ul>  | Prior to beginning of school year |                                   |
| 2 | <p><b>Public Release</b></p> <ul style="list-style-type: none"> <li>• Submit public release to local/community media outlets and local grassroots organizations at beginning of <b>each</b> school year. Also submit to any major local employers contemplating layoffs, if applicable</li> <li>• Document when and where the public release was submitted and keep these records on file for three years plus the current school year</li> </ul>  | Beginning of school year          |                                   |
| 3 | <p><b>Free and Reduced-price Meals Application Process (“Determining Official”)</b></p> <ul style="list-style-type: none"> <li>• Print new/updated application materials</li> <li>• Print new/updated Income Eligibility Guidelines</li> <li>• Print new/updated reimbursement rates</li> <li>• Distribute application materials to all households after July 1 <b>each year</b></li> <li>• Review applications received from households to make sure complete</li> <li>• Follow up with households to obtain or clarify information, if necessary</li> <li>• Determine who is eligible for free and reduced-price meals</li> <li>• Inform households <b>approved</b> for free and reduced-price meals of eligibility status</li> <li>• Inform households <b>denied</b> for free and reduced-price meals of eligibility status and right to apply/reapply</li> <li>• Create benefit issuance list (roster)</li> <li>• Make changes to benefit issuance list as needed throughout the school year</li> <li>• Keep track of students’ carryover of eligibility from previous school year</li> <li>• Ensure increases in eligibility status are made within 3 operating days</li> <li>• Ensure decreases in eligibility status are made within 10 operating days</li> </ul> | Beginning of school year          |                                   |

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|---|---|--|-----------------------------------|
| 4 | <p><b>Direct Certification (DC) Process</b></p> <ul style="list-style-type: none"> <li>Ensure all students who are eligible for free meals/milk based on the DC process are added to the Benefit Issuance list (“Determining Official”). DC must be conduct at least three times per year.</li> </ul>   | Beginning of school year, <u>3<sup>rd</sup> month, and 6 month</u><br><u>Best practice: conduct DC monthly</u> |                                   |
| 5 | <p><b>Menu planning/meal patterns/nutrient analysis</b></p> <ul style="list-style-type: none"> <li>Ensure each meal meets meal pattern requirements</li> <li>Ensure weekly requirements are met for fruits, vegetables(including weekly vegetable subgroups), meat/meat alternate, and grains (if applicable)</li> <li>Ensure at least two low fat or fat free milk types are offered to each student at breakfast and lunch</li> <li>Ensure Offer vs. Serve is implemented properly (if applicable)</li> <li>Ensure meals meet dietary specifications set forth by U.S. Department of Agriculture (USDA)</li> <li>Ensure all required food items/components are available to all students</li> <li>Complete and/or maintain production records/transport slips daily and keep on file for three years plus the current school year</li> <li>Ensure copies of all crediting materials used to determine how a food item contributes to the meal pattern (e.g. Child Nutrition (CN) labels, signed product formulation statements, etc.) are kept on file for three years plus the current school year</li> <li>Track students with special dietary needs and ensure those requiring substitutions have a written medical statement on file</li> <li>Ensure the USDA Milk Substitution Rule is being followed for non-disabled students who cannot consume fluid milk</li> </ul> | Daily  |                                   |
| 6 | <p><b>Point of Service (POS)</b></p> <ul style="list-style-type: none"> <li>Ensure each serving line provides an accurate count by eligibility category at the point of service</li> <li>Ensure all observed meals claimed for reimbursement contain the required number of food items/components</li> </ul>  | Daily  |                                   |
| 7 | <p><b>Claiming</b></p> <p>Prior to submitting the claim for reimbursement <b>each month</b>:</p> <ul style="list-style-type: none"> <li>Complete edit check form <b>each month</b></li> <li>Calculate the attendance factor/attendance adjusted eligible <b>each month</b></li> <li>Investigate any questionable meal counts</li> <li>Correctly combine and record meal count totals</li> </ul>   | Monthly  |                                   |

|    | <b>Task and Responsibilities</b>  | <b>Date</b>                    | <b>Name of Person Responsible</b> |
|----|---|--------------------------------|-----------------------------------|
|    | <ul style="list-style-type: none"> <li>Submit monthly claim online by established claiming deadlines</li> </ul>   |                                |                                   |
| 8  | <b>Food Safety Program</b> <ul style="list-style-type: none"> <li>Develop food safety plan</li> <li>Implement food safety plan</li> <li>Maintain food safety records</li> <li>Ensure food service employees receive ongoing food safety training and keep records of such training on file for three years plus the current school year</li> <li>Regularly update food safety plan</li> <li>Ensure that each site in which meals are prepared and/or served receives two health/food safety inspections per year</li> <li>Ensure that the most recent health/food safety inspection report is posted in a location that is visible to the public and that a copy is provided upon request</li> <li>Ensure that any requests sent to the city/county health department for health/food safety inspections are documented</li> <li>Ensure each site has employee certified in food safety</li> </ul>  | Monthly                        |                                   |
| 9  | <b>Procurement</b> <ul style="list-style-type: none"> <li>Ensure school agency practices free and open competition for every purchase made using school food service program funds</li> <li>Follow all state and federal procurement practices for both formal and informal procurement</li> <li>Submit Invitations for Bid and/or Requests for Proposals for FSMC to California Department of Education (CDE) for review prior to issuance</li> <li>Submit vendor, FSMC, or joint agreement contract to CDE</li> <li>Obtain approval from CDE for all amendments to FSMC contracts and/or for FSMC contract renewals</li> <li>Retain documents to show school agency obtained the desired quality of products and services at the lowest prices (including, but not limited to Requests For Proposals, Invitations For Bids, bid awards, price quotations, price comparisons, product specifications, etc.)</li> <li>Review/update written procedures for procurement and code of conduct</li> </ul> | As needed                      |                                   |
| 10 | <b>Wellness Policy</b> <ul style="list-style-type: none"> <li>Assist with recruiting members of the wellness policy committee</li> <li>Assist with development and implementation of wellness policy</li> <li>Maintain wellness policy records and keep on file for three years plus the current school year</li> <li>Regularly evaluate and update wellness policy</li> <li>Post wellness policy in central location</li> </ul>  | Quarterly/Annually/<br>Monthly |                                   |

|    | <b>Task and Responsibilities</b>  | <b>Date</b>             | <b>Name of Person Responsible</b> |
|----|---|-------------------------|-----------------------------------|
| 11 | <b>Water Availability</b> <ul style="list-style-type: none"> <li>• Make potable water available to children at no charge during meal service in the location where meals are served</li> </ul>  | Daily                   |                                   |
| 12 | <b>Verification Process (“Verifying Official”)</b> <ul style="list-style-type: none"> <li>• Print and review verification forms and instructions on CDE’s website</li> <li>• Determine how many free and reduced price meal applications were <b>approved</b> on or before October 1 (excluding applications for households that have been determined eligible for free meals/milk via the DC process on or before October 1)</li> <li>• Calculate how many free and reduced price meal applications need to be verified</li> <li>• Select applications that need to be verified</li> <li>• Have Confirming Official conduct confirmation reviews on applications selected for verification</li> <li>• Send notification letter (“<i>We must check your application</i>”) to households selected for verification</li> <li>• Review documents submitted by households selected for verification</li> <li>• Follow up with households to obtain or clarify information, if necessary</li> <li>• Determine if any eligibility status changes are needed as a result of verification</li> <li>• Send letters (“<i>We have checked your application</i>”) to households selected for verification to let them know the results</li> <li>• Make any necessary changes to benefit issuance list as a result of verification</li> <li>• Submit Verification Summary Report online by January 15</li> </ul> | October through January |                                   |
| 13 | <b>Civil Rights</b> <ul style="list-style-type: none"> <li>• Ensure “...<i>And Justice For All</i>” poster is displayed in a prominent place</li> <li>• Ensure the nondiscrimination and privacy act statements are included on all appropriate program materials</li> <li>• Establish a system to collect student racial and ethnic data on an annual basis</li> <li>• Ensure reasonable steps are taken to provide foreign language translations to those needing them</li> <li>• Ensure procedures are in place to receive complaints alleging discrimination</li> <li>• Ensure admission procedures do not restrict minority persons from enrolling in school or participating in the CNPs</li> <li>• Ensure all students are allowed equal opportunities to participate in the</li> </ul>  | Daily/Annually          |                                   |

|    | <b>Task and Responsibilities</b>   | <b>Date</b>                     | <b>Name of Person Responsible</b> |
|----|--|---------------------------------|-----------------------------------|
|    | <p>CNPs and all participants are treated in the same manner</p> <ul style="list-style-type: none"> <li>• Ensure accessibility by handicapped persons</li> <li>• Ensure that student eligibility status (F, R, P) is not overtly identified</li> <li>• Ensure regulations are followed for the disclosure of free and reduced price information to specific programs and/or individuals</li> <li>• Ensure front line staff receive civil rights training on an annual basis and keep records of such training on file for three years plus the current school year</li> </ul>   |                                 |                                   |
| 14 | <p><b>Financial Management</b></p> <ul style="list-style-type: none"> <li>• Keep records/ledgers that support all revenues and expenditures for the food service program</li> <li>• Ensure food service program is non-profit and that all revenues are used solely for program purposes</li> <li>• Keep documentation which shows that all revenue from the sale of non-program foods accrues to the non-profit food service account</li> <li>• Keep documentation which shows that non-program foods are priced according to USDA requirements</li> <li>• Gather financial records that support the annual report of all revenues and expenditures for the food service program for the prior school year to calculate net cash resources</li> </ul> | Daily                           |                                   |
| 15 | <p><b>Paid Lunch Equity (PLE)</b></p> <ul style="list-style-type: none"> <li>• Keep records documenting efforts to meet paid lunch pricing requirements by completing the PLE tool, if applicable</li> </ul>   | Annually                        |                                   |
| 16 | <p><b>On-site Monitoring Form</b></p> <ul style="list-style-type: none"> <li>• Complete On-Site Monitoring form (if applicable) prior to February 1 <b>each</b> year for <b>each</b> site</li> <li>• Develop a corrective action plan if necessary</li> <li>• Conduct follow-up after 45 days to ensure corrective action was implemented</li> </ul>   | Complete by February 1          |                                   |
| 17 | <p><b>USDA Foods</b></p> <ul style="list-style-type: none"> <li>• Place order for USDA Foods for upcoming school year during annual ordering period.</li> </ul>  | Ordering period varies annually |                                   |
| 18 | <p><b>Recordkeeping</b></p> <ul style="list-style-type: none"> <li>• Ensure all program records are maintained for three years plus the current year</li> </ul>  | Annually                        |                                   |