## CAFETERIA MANAGERS TRAINING SECTION



## CAFETERIA MANAGERS' TRAINING SECTION TABLE OF CONTENTS

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## MEAL PATTERNS

A. Overview

1. Reason for Change
a. School meals impact millions of children every day.
b. Obesity and food insecurity/hunger threaten the health of these children.

Childhood obesity is at an all-time high. At the same time, millions of children are affected by hunger and food insecurity. It is not implying that school meals are the cause of childhood obesity, because children have a variety of access to food outside of the school meal environment. In fact, new research indicates that children and adolescents consume more calories in added sugars at home rather than away from home for both beverages and foods. These results are consistent with results for total caloric intakes. That is, 65 percent of the total calories that children and adolescents consumed were consumed at home.
c. Changes consistent with the 2010 Dietary Guidelines for Americans and MyPlate messages.

- 2010 Dietary Guidelines

The Dietary Guidelines for Americans are revised every five years and are based on the latest scientific evidence related to diet and health.

- MyPlate is a picture illustrating messages that help consumers know that the foods they are choosing are consistent with the Dietary Guidelines. MyPlate messages are:
- Fill 1/2 your plate with fruits and vegetables.
- Make $1 / 2$ your grains whole.
- Switch to 1\% milk.
- Cut back on solid fat, added sugar, and salt.
d. Schools are a good place to make healthy food choices accessible to youth.

The new rule offers students greater opportunity to make healthy choices while at school, while also assuring that students who experience hunger or food insecurity have increased access to the healthy foods they need to grow and learn.
B. One Approach

1. Food-Based Menu Planning (Refer to the Comparison Chart of the Previous and New School Meal Requirement on pages CM-6 and CM-9 and Implementation Timeline for Final Rule on page CM-10.)
a. A single food-based menu-planning approach is required for school breakfast and lunch.
b. The benefits of using food-based menu planning include:
(1) Simplified management training and monitoring is expected to result in program savings.
(2) Serves as a teaching tool to help children choose a balanced meal.
(3) Ensures students have access to key food groups recommended by the Dietary Guidelines.
(4) Easier for schools to communicate the meal improvements to parents and the community-at-large.
c. Lunch: Schools must begin using food-based menu planning for lunch at the beginning of the 2012-2013 school year. (Refer to Lunch Meal Pattern on page CM-7.)
d. Breakfast: Schools are not required to use this approach to plan school breakfasts until the school year 2013-2014. If a school chooses to use the new approach for breakfast in the 2012-2013 school year, it must indicate this intent on the 2012-2013 Child Nutrition Application and Agreement. (Refer to Breakfast Meal Pattern on page CM-8 that will be required for the 2013-2014 school year.)
2. Identification of the Reimbursable Meal at the Beginning of the Food Service Line (Reference United States Department of Agriclture [USDA] Regulation §210.10[a][2] and §220.8[h] and [j])
a. Schools are required to identify the foods that are part of the reimbursable meal near or at the beginning of the serving line. This seeks to ensure that students understand the components of the reimbursable meal and do not make unintentional purchases of à la carte foods. (Refer to page CM-11 for a copy of the Identification of a Reimbursable Meal sign.)
b. Schools have discretion as to how to identify the foods that are part of the reimbursable meal. For example, the items in a reimbursable meal might be posted in signage near the beginning of the line.
3. Three Grade Groups Are Required
a. The new requirements include new age/grade group classifications. They are more narrow to provide for the age-appropriate nutrition needs of students. The rule requires schools to use the same age/grade groups for planning both lunch and breakfast meals.
b. The rule does allow some flexibility to schools that have different grade configurations. For example, a school site that includes Grades K-8 may use one meal pattern.
c. The meal patterns for the K-5 and 6-8 age/grade groups do overlap; therefore, a single menu can be used to meet the needs of children in Grades K-8. However, the dietary specifications for each grade group must also be met. This will require careful planning. In other words, the meal pattern would include the food quantities that overlap in each of the groups. In addition, the maximum caloric limits cannot be exceeded for the younger students.

In contrast, meal patterns do not overlap for Grades 6-8 and 9-12. For this reason, one single menu with the same amounts of food will not work. Schools that consist of both grade/groups must develop menus accordingly to meet needs of these two separate groups. Most usually, these will only include differences in serving sizes rather than different food items.
d. Additionally, the new meal pattern does not allow for schools with a grade configuration with one grade above or below the grade grouping to follow the predominant grade group requirements (as was previously allowable).
e. The three age/grade groups are:

- Grades K-5
- Grades 6-8
- Grades 9-12


## Age/Grade Group Differences



## Comparision of Current and New Regulatory Requirements Under Final Rule Nutrition Standards in the National School Lunch and School Breakfast Programs January 2012

| National School Lunch Program Meal Pattern |  |  |
| :---: | :---: | :---: |
| Food Group | Current Requirements K-12 | New Requirements K-12 |
| Fruits and Vegetables | 1/2-3/4 cup of fruits and vegetables combined per day | 3/4-1 cup of vegetables plus <br> 1/2-1 cup of fruits per day <br> NOTE: Students are allowed to select $1 / 2$ cup fruit or vegetable under Offer versus Serve (OvS). |
| Vegetables | No specifications as to type of vegetable subgroup | Weekly requirement for: <br> - Dark green <br> - Red/orange <br> - Beans/peas (legumes) <br> - Starchy <br> - Other (as defined in 2010 Dietary Guidelines) |
| Meat/Meat Alternate (M/MA) | 1.5-2 ounce equivalent (oz eq) (daily minimum) | Daily minimum and weekly ranges: <br> Grades K-5-1 oz eq minimum daily (8-10 oz weekly) <br> Grades 6-8-1 oz eq minimum daily (9-10 oz weekly) <br> Grades 9-12-2 oz eq minimum daily (10-12 oz weekly) |
| Grains | 8 servings per week (minimum of 1 serving per day) | Daily minimum and weekly ranges: <br> Grades K-5-1 oz eq minimum daily (8-9 oz weekly) <br> Grades 6-8-1 oz eq minimum daily (8-10 oz weekly) <br> Grades 9-12-2 oz eq minimum daily (10-12 oz weekly) |
| Whole Grains | Encouraged | At least half of the grains must be whole grain-rich beginning July 1 , 2012. Beginning July 1, 2014, all grains must be whole grain-rich. |
| Milk | 1 cup <br> Variety of fat contents allowed; flavor not restricted | 1 cup <br> Must be fat-free (unflavored/ flavored) or 1\% lowfat (unflavored). |

## LUNCH MEAL PATTERN

|  | Grades K-5 | Grades 6-8 | Grades 9-12 |
| :---: | :---: | :---: | :---: |
| Meal Pattern | Amount of Food ${ }^{\text {b }}$ Per Week (Minimum Per Day) |  |  |
| Fruits (cups) ${ }^{\text {c,d }}$ | $21 / 2(1 / 2)$ | $21 / 2(1 / 2)$ | 5 (1) |
| Vegetables (cups) ${ }^{\text {d }}$ | 3 3/4 (3/4) | $33 / 4$ (3/4) | 5 (1) |
| Dark Green | 1/2 | 1/2 | 1/2 |
| Red/Orange ${ }^{\text {f }}$ | 3/4 | 3/4 | $11 / 4$ |
| Beans/Peas (Legumes)f | 1/2 | 1/2 | 1/2 |
| Starchy ${ }^{\text {f }}$ | 1/2 | 1/2 | 1/2 |
| Other ${ }^{\text {f }}$ g | 1/2 | 1/2 | 3/4 |
| Additional Veg to Reach Total ${ }^{\text {h }}$ | 1 | 1 | $11 / 2$ |
| Grains (oz eq) ${ }^{\text {i }}$ | 8-9 (1) | 8-10 (1) | 10-12 (2) |
| Meat/Meat Alternates (oz eq) | 8-10 (1) | 9-10 (1) | 10-12 (2) |
| Fluid Milk (cups) ${ }^{1}$ | 5 (1) | 5 (1) | 5 (1) |
| Mini-max calories (kcal $^{\text {m,n,o }}$ | 550-650 | 600-700 | 750-850 |
| Saturated fat (\% of total calories $)^{\mathrm{n}, \mathrm{o}}$ | $<10$ | $<10$ | $<10$ |
| Sodium (mg) ${ }^{\text {n,p }}$ | $\leq 640$ | $\leq 710$ | $\leq 740$ |
| Trans fat ${ }^{\text {n,o }}$ | Nutrition label or manufacturer specifications must indicate zero grams of trans fat per serving |  |  |

a In the School Breakfast Program (SBP), the above age/grade groups are required, beginning July 1, 2013 (SY2013-14). In SY2012-13 only, schools may continue to use the meal pattern for Grades K-12 (see §220.23).
${ }^{b}$ Food items included in each food group and subgroup and amount equivalents. Minimum creditable serving is $1 / 8$ cup.
c One quarter-cup of dried fruit counts as $1 / 2$ cup of fruit; 1 cup of leafy greens counts as $1 / 2$ cup of vegetables. No more than half of the fruit or vegetable offerings may be in the form of juice. All juice must be 100 percent full-strength.
${ }^{\text {d }}$ For breakfast, vegetables may be substituted for fruits, but the first two cups per week of any such substitution must be from the dark green, red/orange, beans/peas (legumes), or Other Vegetables subgroups as defined in §210.10(c)(2)(iii).
${ }^{e}$ The fruit quantity requirement for the SBP (5 cups/week and a minimum of 1 cup/day) is effective July 1, 2014 (SY2014-15).
f Larger amounts of these vegetables may be served.
g This category consists of Other Vegetables as defined in §210.10(c)(2)(iii)(E). For the purposes of the National School Lunch Program (NSLP), Other Vegetables requirement may be met with any additional amounts from the dark green, red/orange, and beans/peas (legumes) vegetable subgroups as defined in §210.10(c)(2)(iii).
${ }^{h}$ Any vegetable subgroup may be offered to meet the total weekly vegetable requirement.
i At least half of the grains offered must be whole grain-rich in the NSLP beginning July 1, 2012 (SY2012-13), and in the SBP beginning July 1, 2013 (SY2013-14). All grains must be whole grain-rich in both the NSLP and the SBP beginning July 1, 2014 (SY2014-15).
${ }^{j}$ In the SBP, the grain ranges must be offered beginning July 1, 2013 (SY2013-14).
k There is no separate meat/meat alternate component in the SBP. Beginning July 1, 2013 (SY2013-14), schools may substitute 1 oz eq of meat/meat alternate for 1 oz eq of grains after the minimum daily grains requirement is met.
${ }^{1}$ Fluid milk must be lowfat (1 percent milk fat or less, unflavored) or fat-free (unflavored or flavored).
${ }^{m}$ The average daily amount of calories for a 5-day school week must be within the range (at least the minimum and no more than the maximum values).
${ }^{n}$ Discretionary sources of calories (solid fats and added sugars) may be added to the meal pattern if within the specifications for calories, saturated fat, TRANS fat, and sodium. Foods of minimal nutritional value and fluid milk with fat content greater than 1 percent milk fat are not allowed.
${ }^{\circ}$ In the SBP, calories and TRANS fat specifications take effect beginning July 1, 2013 (SY2013-14).
p Final sodium specifications are to be reached by SY2022-23 or July 1, 2022. Intermediate sodium specifications are established for SY2014-15 and SY2017-18. See required specifications in $\S 210.10(\mathrm{f})(3)$ for lunches and $\S 220.8(\mathrm{f})(3)$ for breakfast.

## BREAKFAST MEAL PATTERN

|  | Grades K-5 ${ }^{\text {a }}$ | Grades 6-8 ${ }^{\text {a }}$ | Grades 9-12 ${ }^{\text {a }}$ |
| :---: | :---: | :---: | :---: |
| Meal Pattern | Amount of Food ${ }^{\text {b }}$ Per Week (Minimum Per Day) |  |  |
| Fruits (cups) ${ }^{\text {c,d }}$ | 5 (1) ${ }^{\text {c }}$ | 5 (1) ${ }^{\text {c }}$ | 5 (1) ${ }^{\text {c }}$ |
| Vegetables (cups) ${ }^{\text {d }}$ | 0 | 0 | 0 |
| Dark Green | 0 | 0 | 0 |
| Red/Orange ${ }^{\text {f }}$ | 0 | 0 | 0 |
| Beans/Peas (Legumes) ${ }^{\text {f }}$ | 0 | 0 | 0 |
| Starchy ${ }^{\text {f }}$ | 0 | 0 | 0 |
| Other ${ }^{\text {f,g }}$ | 0 | 0 | 0 |
| Additional Veg to Reach Total ${ }^{\text {h }}$ | 0 | 0 | 0 |
| Grains (oz eq) ${ }^{\text {i }}$ | 7-10 (1) ${ }^{\text {i }}$ | 8-10 (1) ${ }^{\text {j }}$ | 9-10 (1) ${ }^{\text {j }}$ |
| Meat/Meat Alternates (oz eq) | $0^{\mathrm{k}}$ | $0^{\mathrm{k}}$ | $0^{\mathrm{k}}$ |
| Fluid Milk (cups) ${ }^{1}$ | 5 (1) | 5 (1) | 5 (1) |
| Mini-max calories (kcal) ${ }^{\mathrm{m}, \mathrm{n}, \mathrm{o}}$ | 350-500 | 400-550 | 450-600 |
| Saturated fat (\% of total calories) ${ }^{\mathrm{n}, \mathrm{o}}$ | <10 | $<10$ | $<10$ |
| Sodium (mg) ${ }^{\text {n,p }}$ | $\leq 430$ | $\leq 470$ | $\leq 500$ |
| Trans fat ${ }^{\text {n,o }}$ | Nutrition label or manufacturer specifications must indicate zero grams of trans fat per serving. |  |  |

${ }^{\text {a }}$ In the School Breakfast Program (SBP), the above age/grade groups are required, beginning July 1, 2013 (SY2013-14). In SY2012-13 only, schools may continue to use the meal pattern for Grades K-12 (see §220.23).
b Food items included in each food group and subgroup and amount equivalents. Minimum creditable serving is $1 / 8$ cup.
c One quarter-cup of dried fruit counts as $1 / 2$ cup of fruit; 1 cup of leafy greens counts as $1 / 2$ cup of vegetables. No more than half of the fruit or vegetable offerings may be in the form of juice. All juice must be 100 percent full-strength.
d For breakfast, vegetables may be substituted for fruits, but the first two cups per week of any such substitution must be from the dark green, red/orange, beans/peas (legumes), or Other Vegetables subgroups as defined in §210.10(c)(2)(iii).
${ }^{e}$ The fruit quantity requirement for the SBP (5 cups/week and a minimum of 1 cup/day) is effective July 1, 2014 (SY2014-15).
${ }^{f}$ Larger amounts of these vegetables may be served.
$g$ This category consists of Other Vegetables as defined in $\S 210.10(\mathrm{c})(2)(\mathrm{iii})(\mathrm{E})$. For the purposes of the National School Lunch Program (NSLP), Other Vegetables requirement may be met with any additional amounts from the dark green, red/orange, and beans/peas (legumes) vegetable subgroups as defined in §210.10(c)(2)(iii).
${ }^{h}$ Any vegetable subgroup may be offered to meet the total weekly vegetable requirement.
i At least half of the grains offered must be whole grain-rich in the NSLP beginning July 1, 2012 (SY2012-13), and in the SBP beginning July 1, 2013 (SY2013-14). All grains must be whole grain-rich in both the NSLP and the SBP beginning July 1, 2014 (SY2014-15).
${ }^{j}$ In the SBP, the grain ranges must be offered beginning July 1, 2013 (SY2013-14).
k There is no separate meat/meat alternate component in the SBP. Beginning July 1, 2013 (SY2013-14), schools may substitute 1 oz eq of meat/meat alternate for 1 oz eq of grains after the minimum daily grains requirement is met.
${ }^{1}$ Fluid milk must be lowfat (1 percent milk fat or less, unflavored) or fat-free (unflavored or flavored).
m The average daily amount of calories for a 5-day school week must be within the range (at least the minimum and no more than the maximum values).
${ }^{n}$ Discretionary sources of calories (solid fats and added sugars) may be added to the meal pattern if within the specifications for calories, saturated fat, TRANS fat, and sodium. Foods of minimal nutritional value and fluid milk with fat content greater than 1 percent milk fat are not allowed.
${ }^{\circ}$ In the SBP, calories and TRANS fat specifications take effect beginning July 1, 2013 (SY2013-14).
p Final sodium specifications are to be reached by SY2022-23 or July 1, 2022. Intermediate sodium specifications are established for SY2014-15 and SY2017-18. See required specifications in $\S 210.10(\mathrm{f})(3)$ for lunches and $\S 220.8(\mathrm{f})(3)$ for breakfast.

## Comparision of Current and New Regulatory Requirements Under Final Rule <br> Nutrition Standards in the National School Lunch and School Breakfast Programs January 2012

| School Breakfast Program Meal Pattern |  |  |
| :---: | :---: | :---: |
| Food Group | Current Requirements K-12 | New Requirements K-12 |
| Fruits | 1/2 cup per day (vegetable substitution allowed) | 1 cup per day (vegetable substitution allowed) <br> NOTE: Quantity required SY2014-2015. Students are allowed to select $1 / 2$ cup fruit under Offer versus Serve. |
| Grains and Meat/Meat Alternate (M/MA) | 2 grains or 2 meat/meat alternates or 1 of each per day | Daily minimum and weekly ranges for grains: <br> Grades K-5-1 oz eq minimum daily (7-10 oz weekly) <br> Grades 6-8-1 oz eq minimum daily (8-10 oz weekly) <br> Grades 9-12-1 oz eq minimum daily (9-10 oz weekly) <br> NOTE: Quantity required SY2013-2014. Schools may substitute M/MA for grains after the minimum daily grains requirement is met. |
| Whole Grains | Encouraged | At least half of the grains must be whole grain-rich beginning July 1, 2013. Beginning July 1, 2014, all grains must be whole grain-rich. |
| Milk | 1 cup <br> Variety of fat contents allowed; flavor not restricted | $1 \text { cup }$ <br> Must be fat-free (unflavored/ flavored) or $1 \%$ lowfat (unflavored). |

# Implementation Timeline for Final Rule Nutrition Standards in the National School Lunch and School Breakfast Programs 

Implementation of most meal requirements in the National School Lunch Program (NSLP) begins by SY2012-2013. In the School Breakfast Program (SBP), the meal requirements (other than milk) will be implemented gradually beginning SY2013-2014.

| New Requirements | Implementation School Year for NSLP(L) and SBP (B) |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | $2012 / 13$ | $2013 / 14$ | $2014 / 15$ | $2015 / 16$ | $2016 / 17$ | $2017 / 18$ |
|  |  |  |  |  |  |  |

## Fruits Component

| • Offer fruit daily | L |  |  |  |  |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| • Fruit quantity increase to |  |  |  |  |  |  |  |
| 5 cups/week (minimum |  |  |  |  |  |  |  |
| 1 cup/day) |  |  | B |  |  |  |  |

Vegetables Component

| Offer vegetables <br> subgroups weekly | L |  |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- |

Grains Component

| • Half of grains must be <br> whole grain-rich | L | B |  |  |  |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| • All grains must be whole <br> grain-rich |  |  | L,B |  |  |  |  |
| • Offer weekly grains ranges | L | B |  |  |  |  |  |

## Meat/Meat Alternate Component

| Offer weekly meat/meat <br> alternate ranges (daily min) | L |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |

## Milk Component

| • Offer only fat-free <br> (unflavored or flavored) <br> and lowfat (unflavored) milk | L,B |  |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- |

## Dietary Specifications (To Be Met on Average Over a Week)

| • Calorie ranges L B      <br> • Saturated fat limit (no <br> change) L,B       <br> Sodium targets <br> * Target 1   L,B     <br> * Target 2        |
| :--- |
| Rerget grams of trans fat <br> per portion |

## Age-Grade Groups

| • Establish age/grade <br> groups: K-5, 6-8, 9-12 | L | B |  |  |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: |

## Offer versus Serve

| • Reimbursable meals must <br> contain a fruit or vegetable <br> $(1 / 2$ cup minimum $)$ | L |  |  |  |  |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: | :---: |

## Monitoring

| • 3-year Adm Review cycle |  | L,B |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| • Conduct weighted nutrient <br> analysis on 1 week of menus | L | B |  |  |  |  |  |

## The Full-Value Lunch Meal



MyPlate

Meat, meat alternate or main dish
(Main dishes include a meat and bread/grain)

Vegetables
1 or more of your choice

Fruits
1 or more of your choice
MyPlate


MyPlate


MyPlate

Bread or grain
1 item

Fat-free or low-fat milk
½ pint

# Offer versus Serve: THE CHOICE IS YOURS! <br> You may select all 5 items, or any $2+$ a fruit or vegetable. 

4. Five Vegetable Subgroups Are Required
a. There are five vegetable subgroups that must be offered on a weekly basis at lunch:
(1) Dark green
(2) Red/orange
(3) Beans/peas (legumes)
(4) Starchy
(5) Other
b. Each one must be offered weekly in the quantity required.
c. Each one must be available on all lines if school has multiple lines.

Schools that choose to offer a variety of reimbursable lunches or provide multiple serving lines must make all required food components available to all students on every lunch line in at least the minimum required amounts.

Refer to the vegetable subgroup document to identify in which group the various vegetables fall on page CM-24.
5. Fruits and Vegetables Are Two Separate Components
a. Under the new rule, the quantities of fruit and vegetable are separate. Previously, students were offered $1 / 2$ to $3 / 4$ cup of fruit and/or vegetable. Now, students must be offered $1 / 2$ to 1 cup of fruit AND 3/4 to 1 cup of vegetable at lunch. The quantities depend upon the grade group.
b. For the breakfast meal pattern that is required to be used in the 2013-2014 school year, fruit is a required component. Vegetables can be substituted for the fruit at breakfast, but only if the first two cups per week of any such substitution are from the dark green, red/orange, beans/peas (legumes), or the other vegetable subgroup.

For example, to substitute potatoes for fruit at breakfast, there must be at least two cups of dark green, red/ orange, beans/peas (legumes), or the other vegetable subgroup offered at breakfast during the same week.
c. Offer versus Serve.

- Lunch—Student must take at least $1 / 2$ cup of fruit or vegetable.
- Breakfast—Student must take at least $1 / 2$ cup of fruit or vegetable.
- All other items must be taken in quantity served.

6. Daily Minimum and Weekly Ranges for Meat/Meat Alternate
a. Staying within the weekly ranges for each grade group will assist menu planners in not exceeding the caloric limits. In addition, using lowfat preparation methods and specifying lowfat and low-sodium commercially prepared meat/meat alternates will be helpful in meeting the dietary specifications for fat and sodium.
b. To help lower the cost and operational concerns of schools regarding the new meal patterns, there is no requirement for meat/meat alternate at breakfast.
7. Whole-Grain Requirement
a. Previously, there was a daily minimum and weekly minimum quantity of grains. And while whole grains were encouraged, they were not required.
b. Under the new requirements, there are both a daily and weekly range (minimum and maximum quantity). Staying within the range will assist menu planners in staying under the maximum calories for each grade group.
c. To help ease cost and production concerns, the implementation of the whole-grain requirement will be phased in over several years. (Refer to page CM-39 [Updated Grains/Breads Chart].)
8. Desserts

Schools may count no more than two grains-based desserts per week toward the grains requirement. Beginning with the 2013-2014 school year, the desserts will need to be whole-grain. As with other parts of the new rule, this requirement will help schools stay within the dietary specifications.
9. Milk
a. Under the new meal pattern requirements, schools may offer only lowfat and fat-free milk. If flavored, the milk must be fat-free. This requirement will help schools stay within the caloric ranges.
b. To encourage children to drink milk, schools must offer at least two varieties of milk. These varieties may include lactose-free or lactose-reduced milk as long as they are either lowfat or fat-free.
c. Schools must offer at least two varieties of milk to students from the following selection:

- Lowfat, unflavored
- Fat-free, unflavored or flavored
- Fat-free or lowfat (lactose-reduced or lactose-free)
d. The provision for milk substitution beverages for students with dietary limitations has not changed. (Refer to milk substitution form on page CM-115.)
e. Milk substitution beverages can be offered to students with special dietary needs (not disabilities) in place of milk. The request must be in writing and from the parent or authorized medical authority. Substitutions are made on a case-by-case basis. Milk substitution beverages are not intended for general consumption. The milk substitutes must meet Nutrition Standards for nondairy substitutes, including nine specific nutrients (calcium, protein, vitamin A, vitamin D, magnesium, phosphorus, potassium, riboflavin, and vitamin $B_{12}$ ).
f. Water does not substitute for fluid milk. However, in accordance with the Healthy and Hunger-Free Kids Act of 2010, water must be available in the food service area for students who wish to drink it. Schools who have a water fountain in the dining area are meeting this requirement.
C. Components

1. Fruits

## Fruits

|  | Breakfast Meal Pattern |  |  | Lunch Meal Pattern |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Grades K-5 | Grades 6-8 | Grades 9-12 | Grades K-5 | Grades 6-8 | Grades 9-12 |  |
|  | Amount of Food Per Week (Minimum PerDay) |  |  |  |  |  |  |
| Fruits <br> (cups) | $5(1)$ | $5(1)$ | $5(1)$ | $2.5(0.5)$ | $2.5(0.5)$ | $5(1)$ |  |

a. Fruits/vegetables separated into two components
b. A daily serving at breakfast and lunch

- At breakfast only: Vegetables may be offered in place of fruits
c. May select from fresh, frozen without added sugar, canned in juice/light syrup, or dried fruit options
- No more than half of fruit offerings may be in the form of juice
- 100 percent juice only
- $1 / 4$ cup of dried fruit $=1 / 2$ cup of fruit
- Refer to Food-Buying Guide for crediting

Vegetables

|  | Breakfast Meal Pattern |  |  | Lunch Meal Pattern |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Grades K-5 | Grades 6-8 | Grades 9-12 | GradesK-5 | Grades 6-8 | Grades 9-12 |
|  | Amount of Food Per Week (Minimum Per Day) |  |  |  |  |  |
| Vegetables <br> (cups) | 0 | 0 | 0 | $3.75(0.75)$ | $3.75(0.75)$ | $5(1)$ |
| Dark <br> Green | 0 | 0 | 0 | 0.5 | 0.5 | 0.5 |
| Red/ <br> Orange | 0 | 0 | 0 | 0.75 | 0.75 | 1.25 |
| Beans/ <br> Peas <br> (Legumes) | 0 | 0 | 0 | 0.5 | 0.5 | 0.5 |
| Starchy | 0 | 0 | 0 | 0.5 | 0.5 | 0.5 |
| Other | 0 | 0 | 0 | 0.5 | 0.5 | 0.75 |
| Additional <br> Veg to <br> Reach <br> Total | 0 | 0 | 0 |  | 1 | 1.5 |

a. A daily serving at lunch that reflects variety over the week
b. Vegetable subgroup weekly requirements for:

- Dark Green (e.g., broccoli, collard greens, spinach)
- Red/Orange (e.g., carrots, sweet potatoes, tomatoes)
- Beans/Peas (Legumes) (e.g., kidney beans, lentils, chickpeas)
- Starchy (e.g., corn, green peas, white potatoes)
- Other (e.g., onions, green beans, cucumbers)
- Additional vegetables to meet 5-cup weekly total
c. Variety of preparation methods available:
- Fresh, frozen, canned
- USDA Foods offers a variety of no-salt added or lower-sodium products
d. Changes in crediting of leafy greens
- One cup raw leafy greens equals $1 / 2$ cup of vegetable
e. Foods from the beans/peas (legumes) subgroup may be credited as a vegetable $\boldsymbol{O R}$ a meat alternate, but not as both.

Grains/Breads

|  | Breakfast Meal Pattern |  |  | Lunch Meal Pattern |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Grades K-5 | Grades 6-8 | Grades 9-12 | Grades K-5 | Grades 6-8 | Grades 9-12 |
|  | Amount of Food Per Week (Minimum Per Day) |  |  |  |  |  |
| Grains <br> (0Z eq) | $7-10(1)$ | $8-10(1)$ | $9-10(1)$ | $8-9(1)$ | $8-10(1)$ | $10-12(2)$ |

a. Schools must offer the daily and weekly minimum serving ranges of grains at lunch without exceedng the maximums

- Initially, at least $1 / 2$ of grains offered during the week must be whole grain-rich
- Beginning in SY2014-2015, all grains offered must be whole grain-rich
- Whole grain-rich foods must contain at least 50 percent whole grains
b. Criteria for whole grain-rich foods:
- Meet the serving size requirements in the Grains/Breads Instruction

AND

- Meet at least ONE of the following:
- Whole grains per serving must be $\geq 8$ grams
- Product includes Food and Drug Administration's (FDA's) whole-grain health claim on its packaging
- Product ingredient listing lists whole grain first
c. Grains-Based Desserts
- Only two creditable grains-based desserts allowed at lunch per school week
- These items are a major source of solid fats and added sugars per DGA 2010
d. Grains: Breakfast NOTE: The following breakfast meal pattern is for SY2013-2014.
- Offer the daily and weekly serving ranges of grains at breakfast
- Phased-in implementation of whole grain-rich
- Schools MAY substitute meat/meat alternate for grains once daily grains minimum is met
- Formulated grain-fruit products cannot be used to meet grains or fruit components at breakfast
- Formulated grain-fruit products consist of grain-type products that have grain as the primary ingredient and grain-fruit-type products that have fruit as the primary ingredient. They are heavily fortified, high in solid fats and added sugars (e.g., fortified pastries).
- The term formulated grain-fruit products does NOT apply to granola bars or fortified cereals.

4. Meats

Meat/Meat Alternate

|  | Breakfast Meal Pattern |  |  | Lunch Meal Pattern |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Grades K-5 | Grades 6-8 | Grades 9-12 | Grades K-5 | Grades 6-8 | Grades 9-12 |  |
| Meal Pattern | Amount of Food Per Week (Minimum Per Day) |  |  |  |  |  |  |
| Meat/ <br> Meat <br> Alternate <br> (oz eq) | 0 | 0 | 0 | $\mathbf{8 - 1 0}$ (1) | 9-10 (1) | 10-12 (2) |  |

a. Daily and weekly requirements for lunch only
b. 2 oz eq daily for students in Grades 9-12
c. 1 oz eq daily for younger students
d. A variety of meat/meat alternate are encouraged
e. Tofu and soy yogurt will be allowable as a meat alternate
5. Fluid Milk

Milk

|  | Breakfast Meal Pattern |  |  | Lunch Meal Pattern |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Grades K-5 | Grades 6-8 | Grades 9-12 | Grades K-5 | Grades 6-8 | Grades 9-12 |
| Meal Pattern | Amount of Food Per Week (Minimum Per Day) |  |  |  |  |  |
| Fluid <br> Milk <br> (Cups) | $5(1)$ | $5(1)$ | $5(1)$ | $5(1)$ | $5(1)$ | $5(1)$ |

a. Allowable milk options include:

- Fat-free (unflavored or flavored)
- Lowfat (unflavored only)
- Fat-free or lowfat (lactose-reduced or lactose-free)
b. Must offer at least two choices
c. Does not alter Nutrition Standards for milk substitutes (e.g., soy beverages)
d. Students MAY decline milk component under Offer versus Serve.
D. Dietary Specifications-Calories, Saturated Fat, Sodium, and Trans Fat

The dietary specifications were established for each grade group and are meant to be met, on average, over the week. The exception is trans fat. Food products or ingredients used by the school must contain zero grams of trans fat per serving. Small amounts of trans fat are acceptable if they are naturally present in the food item. These products include beef and lamb.

1. Calorie Ranges
a. Minimum and maximum calorie (kcal) levels

- Average over course of the week
b. Effective 2012-2013 school year for NSLP
c. Effective 2013-2014 school year for SBP

| GRADES | LUNCH <br> (kcal) | BREAKFAST <br> (kcal) |
| :---: | :---: | :---: |
| K-5 | $550-650$ | $350-500$ |
| $6-8$ | $600-700$ | $400-550$ |
| $9-12$ | $750-850$ | $450-600$ |

2. Saturated fat
a. Limit saturated fat

- Less than 10 percent of total calories
- Same as current regulatory standard
b. No total fat standard

3. Sodium
a. Intermediate targets can help schools reach final targets

- Target 1: SY2014-2015
- Target 2: SY2017-2018
- Target 3: SY2022-2023
b. The sodium levels in this table reflect the targets for the 2014-2015 school year. There are two other target levels that will be phased in over the next ten years.

Sodium
Daily amount based on the average over a 5-day week

| Sodium | K-5 Grades | $6-8$ Grades | 9-12 Grades |
| :--- | :---: | :---: | :---: |
|  |  |  |  |
|  | $\leq 1230 \mathrm{mg}$ | $\leq 1360 \mathrm{mg}$ | $\leq 1420 \mathrm{mg}$ |

4. Trans fat
a. New trans fat restriction:

- Begins SY2012-2013 for NSLP
- Begins SY2013-2014 for SBP
b. Food products and ingredients must contain no trans fat. This is defined as less than 0.5 grams per serving. Schools will need to review the food product label or manufacturer specifications to determine trans fat content.
c. This requirement does not pertain to the trans fat naturally occurring in animal products such as beef and lamb. For example, a ground beef pizza may contain more than 0.5 grams trans fat per serving if the source is the ground beef. If the pizza crust contains trans fat, the pizza would not meet the dietary specification criteria.
d. The only clear way to determine if the product is in compliance with trans fat is for schools to request this information from suppliers on how much of the trans fat is naturally occurring versus if any of the other ingredients contain trans fat.


## MENU PLANNING

Consider the following factors when planning menus:

- May utilize menu-planning tool on pages CM-21 through CM-23 for each grade group.
- Make sure half of all grains/breads served are whole grain-rich.
- Do not exceed maximum servings on meat/meat alternate and grains/breads according to grade group.
- No more than two grains-based desserts per week.
- Include all vegetable subgroups over the week. (Refer to subgroup on page CM-24.)
- Limit amount of processed food.
- Use USDA recipes.
- Consider condiments (calories, fat, sodium).
- Adapt menus according to grade/group.
- Refer to charts on short and long weeks on pages CM-25 through CM-28.
Menu-PlanningTool— Lunch Menus for Grades K-5
Instructions: Plan 1 week of school meals for Grades K-5 to meet both daily and weekly requirements. Indicate calorie amounts for each planned item that is being served per day. Record total calories in bottom box for each day.

| LUNCH | Monday | Tuesday | Wednesday | Thursday | Friday | Weekly Totals |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Meat/Meat Alternates: 1 oz/daily, 8-10/week |  |  |  |  |  |  |
| Grains/Breads: <br> 1 oz/daily, 8-9/week |  |  |  |  |  |  |
| Vegetables: <br> 3/4 cup/daily, 3 3/4 cups/ weekly |  |  |  |  |  |  |
| Dark Green Vegetable: 1/2 cup/week |  |  |  |  |  |  |
| Red/Orange Vegetable: 3/4 cup/week |  |  |  |  |  |  |
| Beans/Peas (Legumes): 1/2 cup/week |  |  |  |  |  |  |
| Starchy Vegetable: <br> 1/2 cup/week |  |  |  |  |  |  |
| Other Vegetable: 1/2 cup/week |  |  |  |  |  |  |
| Fruits: <br> 1/2 cup/daily, 2 1/2 cups/ weekly |  |  |  |  |  |  |
| Milk, 2 varieties: |  |  |  |  |  |  |
| Noncreditable Food Items |  |  |  |  |  |  |
| Calories: 550-650 <br> Sodium: $\leq 640 \mathrm{mg}$ |  |  |  |  |  |  |

Menu-Planning Tool—Lunch Menus for Grades 6-8
Instructions: Plan 1 week of school meals for Grades 6-8 to meet both daily and weekly requirements. Indicate calorie amounts for each planned item that is being served per day. Record total calories in bottom box for each day.

| LUNCH | Monday | Tuesday | Wednesday | Thursday | Friday | Weekly Totals |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Meat/Meat Alternates: 1 oz/daily, 9-10/week |  |  |  |  |  |  |
| Grains/Breads: <br> 1 oz/daily, 8-10/week |  |  |  |  |  |  |
| Vegetables: <br> 3/4 cup/daily, 3 3/4 cups/ weekly |  |  |  |  |  |  |
| Dark Green Vegetable: 1/2 cup/week |  |  |  |  |  |  |
| Red/Orange Vegetable: 3/4 cup/week |  |  |  |  |  |  |
| Beans/Peas (Legumes): 1/2 cup/week |  |  |  |  |  |  |
| Starchy Vegetable: <br> 1/2 cup/week |  |  |  |  |  |  |
| Other Vegetable: 1/2 cup/week |  |  |  |  |  |  |
| Fruits: <br> 1/2 cup/daily, 2 1/2 cups/ weekly |  |  |  |  |  |  |
| Milk, 2 varieties: 1 cup/daily |  |  |  |  |  |  |
| Noncreditable Food Items |  |  |  |  |  |  |
| Calories: 600-700 <br> Sodium: $\leq 710 \mathrm{mg}$ |  |  |  |  |  |  |

Menu-Planning Tool—Lunch Menus for Grades 9-12
Instructions: Plan 1 week of school meals for Grades 9-12 to meet both daily and weekly requirements. Indicate calorie amounts for each planned item that is being served per day. Record total calories in bottom box for each day.



## Short and Long Week Calculations

- Calculations are rounded to the nearest 0.5 oz eq and 0.25 cup.
- Calculations apply to schools who regularly operate on a shorter or longer weekly cycle.
- Since the dietary specifications are based on average daily amounts, these are unaffected by varying week lengths (average over length of week, whether consisting of 3 to 7 days).
- Due to size of weekly vegetable subgroup requirements, the 20 percent adjustment is not practical. Therefore, adjustments are primarily made to the Additional Vegetable category only-which in turn allows increased or decreased offering amounts of any of the subgroups to meet this requirement.


## Three-Day School Week Meal Component Adjustments

| 3-Day School Week <br> Breakfast | Grades K-5 <br> Weekly (Daily) | Grades 6-8 <br> Weekly (Daily) | Grades 9-12 <br> Weekly (Daily) |
| :--- | :---: | :---: | :---: |
| Fruits (cups) | $3(1)$ | $3(1)$ | $3(1)$ |
| Grains (oz eq) | $4-6(1)$ | $5-6(1)$ | $5.5-6(1)$ |
| Fluid Milk (cups) | $3(1)$ | $3(1)$ | $3(1)$ |


| 3-Day School Week <br> Lunch | Grades K-5 <br> Weekly (Daily) | Grades 6-8 <br> Weekly (Daily) | Grades 9-12 <br> Weekly (Daily) |
| :--- | :---: | :---: | :---: |
| Fruits (cups) | $1.5(.05)$ | $1.5(0.5)$ | $3(1)$ |
| Vegetables (cups) | $2.25(0.75)$ | $2.25(0.75)$ | $3(1)$ |
| Dark Green | 0.5 | 0.5 | 0.5 |
| Red/Orange | 0.5 | 0.5 | 1 |
| Beans/Peas (Legumes) | 0.5 | 0.5 | 0.5 |
| Starchy | 0.5 | 0.5 | 0.5 |
| Other | 0 | 0.25 | 0.5 |
| Additional Veg to Reach <br> Total | $5-5.5(1)$ | $5-6(1)$ | $0-7(2)$ |
| Grains (oz eq) | $5-6(1)$ | $5.5-6(1)$ | $6-7(2)$ |
| Meat/Meat Alternates <br> (oz eq) | $3(1)$ | $3(1)$ | $3(1)$ |
| Fluid Milk (cups) |  |  |  |

Four-Day School Week Meal Component Adjustments

| 4-Day School Week <br> Breakfast | Grades K-5 <br> Weekly (Daily) | Grades 6-8 <br> Weekly (Daily) | Grades 9-12 <br> Weekly (Daily) |
| :--- | :---: | :---: | :---: |
| Fruits (cups) | $4(1)$ | $4(1)$ | $4(1)$ |
| Grains (oz eq) | $5.5-8(1)$ | $6.5-8(1)$ | $7-8(1)$ |
| Fluid Milk (cups) | $4(1)$ | $4(1)$ | $4(1)$ |


| 4-Day School Week <br> Lunch | Grades K-5 <br> Weekly (Daily) | Grades 6-8 <br> Weekly (Daily) | Grades 9-12 <br> Weekly (Daily) |
| :--- | :---: | :---: | :---: |
| Fruits (cups) | $2(.05)$ | $2(0.5)$ | $4(1)$ |
| Vegetables (cups) | $3(0.75)$ | $3(0.75)$ | $4(1)$ |
| Dark Green | 0.5 | 0.5 | 0.5 |
| Red/Orange | 0.75 | 0.75 | 1.25 |
| Beans/Peas (Legumes) | 0.5 | 0.5 | 0.5 |
| Starchy | 0.5 | 0.5 | 0.5 |
| Other | .25 | 0.5 | 0.75 |
| Additional Veg to Reach <br> Total | $6.5-7(1)$ | $6.5-8(1)$ | $8-9.5(2)$ |
| Grains (oz eq) | $6.5-8(1)$ | $7-8(1)$ | $8-9.5(2)$ |
| Meat/Meat Alternates <br> (oz eq) | $4(1)$ | $4(1)$ | $4(1)$ |
| Fluid Milk (cups) |  |  |  |

## Six-Day School Week Meal Component Adjustments

| 6-Day School Week <br> Breakfast | Grades K-5 <br> Weekly (Daily) | Grades 6-8 <br> Weekly (Daily) | Grades 9-12 <br> Weekly (Daily) |
| :--- | :---: | :---: | :---: |
| Fruits (cups) | $6(1)$ | $6(1)$ | $6(1)$ |
| Grains (oz eq) | $8.5-12(1)$ | $9.5-12(1)$ | $11-12(1)$ |
| Fluid Milk (cups) | $6(1)$ | $6(1)$ | $6(1)$ |


| 6-Day School Week <br> Lunch | Grades K-5 <br> Weekly (Daily) | Grades 6-8 <br> Weekly (Daily) | Grades 9-12 <br> Weekly (Daily) |
| :--- | :---: | :---: | :---: |
| Fruits (cups) | $3(.05)$ | $3(0.5)$ | $6(1)$ |
| Vegetables (cups) | $4.5(0.75)$ | $4.5(0.75)$ | $6(1)$ |
| Dark Green | 0.5 | 0.5 | 0.5 |
| Red/Orange | 0.75 | 0.75 | 1.25 |
| Beans/Peas (Legumes) | 0.5 | 0.5 | 0.5 |
| Starchy | 0.5 | 0.5 | 0.5 |
| Other | 1.75 | 1.75 | 0.75 |
| Additional Veg to Reach <br> Total | $9.5-11(1)$ | $9.5-12(1)$ | 2.5 |
| Grains (oz eq) | $9.5-12(1)$ | $11-12(1)$ | $12-14.5(2)$ |
| Meat/Meat Alternates <br> (oz eq) | $6(1)$ | $6(1)$ | $12-14.5(2)$ |
| Fluid Milk (cups) |  |  | $6(1)$ |

## Seven-Day School Week Meal Component Adjustments

| 7-Day School Week <br> Breakfast | Grades K-5 <br> Weekly (Daily) | Grades 6-8 <br> Weekly (Daily) | Grades 9-12 <br> Weekly (Daily) |
| :--- | :---: | :---: | :---: |
| Fruits (cups) | $7(1)$ | $7(1)$ | $7(1)$ |
| Grains (oz eq) | $10-14(1)$ | $11-14(1)$ | $12.5-14(1)$ |
| Fluid Milk (cups) | $7(1)$ | $7(1)$ | $7(1)$ |


| 7-Day School Week <br> Lunch | Grades K-5 <br> Weekly (Daily) | Grades 6-8 <br> Weekly (Daily) | Grades 9-12 <br> Weekly (Daily) |
| :--- | :---: | :---: | :---: |
| Fruits (cups) | $3.5(.05)$ | $3.5(0.5)$ | $7(1)$ |
| Vegetables (cups) | $5.25(0.75)$ | $5.25(0.75)$ | $7(1)$ |
| Dark Green | 0.5 | 0.5 | 0.5 |
| Red/Orange | 0.75 | 0.75 | 1.25 |
| Beans/Peas (Legumes) | 0.5 | 0.5 | 0.5 |
| Starchy | 0.5 | 0.5 | 0.5 |
| Other | 2.5 | 2.5 | 0.75 |
| Additional Veg to Reach <br> Total | $11-12.5(1)$ | $11-14(1)$ | $14-17(2)$ |
| Grains (oz eq) | $11-14(1)$ | $12.5-14(1)$ | $14-17(2)$ |
| Meat/Meat Alternates <br> (oz eq) | $7(1)$ | $7(1)$ | $7(1)$ |
| Fluid Milk (cups) |  |  |  |

## Crediting of Food

## A. Food-Buying Guide

The USDA Food-Buying Guide provides menu planners with information regarding crediting food items that have a Standard of Identity toward the meal pattern requirements. It will be used to determine how much food to purchase and buy.

1. The Food-Buying Guide can be accessed electronically at the National Food Service Management Institute (NFSMI) Web site or by ordering a hard copy through USDA Team Nutrition Resource Library. It is also available on the Oklahoma State Department of Education (hereinafter known as the State Agency) Web site. There should be a hard copy at every site.
2. Foods are grouped in the Food-Buying Guide in the following sections:

- Section 1: Meats and Meat Alternates
- $\quad$ Section 2: Vegetables and Fruits
- Section 3: Grains/Breads
- Section 4: Milk
- Section 5: Other Foods (the foods in this section do not meet any of the requirements for any components in the meal patterns)

3. The Food-Buying Guide is divided into yield tables using a six-column format:


Column 1—Food As Purchased, AP: Tells you the name of the food item and the form(s) in which it is purchased. Individual foods are arranged in alphabetical order by type of food.

Column 2—Purchase Unit: Tells you the basic unit of purchase for the food. For most foods, the guide lists Pound as the purchase unit.

Column 3—Servings Per Purchase Unit, EP (Edible Portion): Shows the number of servings of a given size (found in Column 4) from each purchase unit (found in Column 2). It is based on average yields from good-quality foods prepared in ways that result in a minimum of waste.

Column 4—Serving Size Per Meal Contribution: Describes a serving by weight, measure, or number of pieces or slices. Sometimes both measure and weight are given or the measure and number of pieces or slices.

For foods specified in the meal patterns, the serving size given in this column can be credited toward meeting the meal pattern requirements. For many fruits and vegetables, both pieces and 1/4-cup servings are included.

Column 5-Purchase Units for 100 Servings: Shows the number of purchase units you need for 100 servings. This number was calculated using the purchase unit listed in Column 2 and the serving size (by weight) listed in Column 4. Numbers in Column 5 have been rounded up to help ensure enough food is available for 100 servings.

Column 6-Additional Information: Provides other information to help you calculate the amount of food you need to purchase and/or prepare.

For many food items, this column shows the quantity of ready-to-cook or cooked food you will get from a pound of food as purchased.

The data in the yield tables can help you in a variety of ways as you plan menus, make purchasing decisions, and check to make sure meals will meet CNP requirements.
4. Calculating how much food you need for a given number of servings:

- Foods are most often purchased in case lots. Keep in mind that the purchase amount may differ from the calculated amount to prepare a menu item.
- Always round up when calculating how much food to buy.
- Always round down when calculating the creditable component toward meeting a meal pattern requirement.

5. To calculate how much of any food to purchase, you should begin by asking yourself the following questions:

- How many servings will I need?
- Will different serving sizes be used for various age/grade groupings?
- What is my planned serving size for this food?
- In what form will I purchase this food?
- What serving size is listed in Column 4?
- Is the listed serving size the same as my planned serving size?
- How many purchase units of the food will I need to buy?


## Example 1

You are planning to serve $1 / 4$ cup of raw, unpeeled fresh apples. You will be purchasing fresh, whole apples, case count 125-138. How many pounds of fresh, whole apples will you need to buy?

1. Estimate the number of servings of the prepared food you will need.

You estimate that you will need 200 1/4-cup servings of fresh, unpeeled apple.
2. Locate the food in the Food-Buying Guide in the form you intend to serve.

Section 2-Vegetables/Fruits

| $1 \begin{gathered} \text { FoodAs } \\ \text { Purchased, } \\ \text { AP } \end{gathered}$ | $2 \begin{gathered} \text { Purchase } \\ \text { Unit } \end{gathered}$ | $\begin{array}{\|cc} 3 & \text { Servings } \\ \text { Per } \\ & \text { Purchase } \\ \text { Unit,EP } \end{array}$ | $4 \underset{\substack{\text { Meal } \\ \text { Contribution }}}{\left.\begin{array}{c} \text { Serving Size Per } \end{array}\right)}$ | $5 \begin{gathered}\text { Purchase } \\ \text { Units for }\end{gathered}$ 100 Servings | $6 \quad \begin{gathered} \text { Additional } \\ \text { Information } \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: | :---: |
| APPLES |  |  |  |  |  |
| Apples, fresh 125-138 count Whole | Pound | 14.8 | 1/4 cup raw, unpeeled fruit (about 1/4 apple) | 6.8 | $1 \mathrm{lb} \mathrm{AP}=0.91 \mathrm{lb}$ (3 $2 / 3$ cups) ready-tocook or -serve raw, cored, unpeeled apple |

3. Check the serving size listed in Column 4. Compare this to your planned serving size.

Column 4 reads: $1 / 4$ cup raw, unpeeled fruit (about $1 / 4$ apple)
This is the same as your planned serving size to all students, so no conversion is needed.
4. Refer to Column 2 to find the purchase unit. Refer to Column 3 for the number of servings you will get per purchase unit.

Column 2 reads: Pound

Column 3 reads: 14.8
5. Divide the number of servings needed by the number of servings you will get per purchase unit (Column 3).

Number of servings needed $=200$
Servings per purchase unit $=14.8$
200 divided by $14.8=13.51$
6. Round up to $\mathbf{1 4 . 0}$ pounds to ensure enough food is available.

ANSWER: You will need 14.0 pounds of fresh, unpeeled apples for 200 1/4-cup servings.

## Example 2

You are planning to serve ground beef tacos with no more than 20 percent fat to 600 students of different grade levels. How many pounds of ground beef will you need?

1. Estimate the number of servings and the serving size of the prepared food for each age/grade.

You estimate that of the 600 planned servings, 200 will be served $11 / 2$ ounces each and 400 will be served 2 ounces each.
2. Locate the food in the Food-Buying Guide in the form you intend to serve.

Section 2-Meat/Meat Alternates

| $1 \begin{gathered} \text { FoodAs } \\ \text { Purchased, } \\ \text { AP } \end{gathered}$ | $2 \begin{gathered} \text { Purchase } \\ \text { Unit } \end{gathered}$ | $3 \begin{gathered} \text { Servings } \\ \text { Per } \\ \text { Purchase } \\ \text { Unit, EP } \end{gathered}$ |  | $5 \begin{gathered}\text { Purchase } \\ \text { Units for } \\ 100 \\ \\ \\ \\ \text { Servings }\end{gathered}$ | $6 \begin{gathered}\text { Additional } \\ \text { Information }\end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Beef, Ground, fresh or frozen ${ }^{7,8}$ | Pound | $11.8$ | 1 oz cooked lean meat | $8.5$ | $1 \mathrm{lb} \mathrm{AP}=0.74 \mathrm{lb}$ cooked, drained lean meat |
| no more than 20\% fat includes USDA commodity (Like IMPS \#136) | Pound | 7.89 | $11 / 2$ oz cooked lean meat | 12.7 |  |

3. Check the serving sizes listed in Column 4. Compare this to your planned serving sizes.

Column 4 reads: 1 ounce cooked lean meat and 1 1/2 ounces cooked lean meat

Since there is no serving size for 2 ounces of cooked lean meat, a conversion is needed.
4. Calculate the total ounces of cooked lean meat needed.

| 200 servings $X 1.5$ ounces | $=300$ ounces |
| ---: | :--- |
| 400 servings $X 2.0$ ounces | $=\frac{800 \text { ounces }}{1,100 \text { ounces total cooked lean meat }}$ |

You need a total of 1,100 ounces of cooked lean meat. Since this total is in units of 1 ounce, you can now use the serving size of 1 ounce cooked lean meat as found in Column 4.
5. Refer to Column 2 to find the purchase unit. Refer to Column 3 for the number of servings you will get per purchase unit.

Column 2 reads: Pound
Column 3 reads: 11.8
6. Divide the total number of ounces needed by the number of servings you will get per purchase unit (Column 3).

Number of total ounces needed $=1,100$
Servings per purchase unit $=11.8$

1,100 divided by $11.8=93.22$
7. Round up to $\mathbf{9 4}$ pounds to ensure enough food is available.

ANSWER: You will need 94 pounds of raw ground beef for the required serving sizes for 600 people.

NOTE: USDA has not updated the Food-Buying Guide to be reflective of the new meal pattern changes. The following changes must be considered when using the Food-Buying Guide:

- Green leafy vegetables include 1-cup quantity credit to a 1/2-cup vegetable credit.
- One-fourth cup of dried fruit counts as 1/2 cup.

USDA will be updating the Food-Buying Guide in segments. The first task will be to separate the Fruits and Vegetables Section as well as add the vegetable subgroups. USDA recognizes that SFAs will need this information as soon as possible; therefore, USDA will post updated sections as soon as they are available to the FNS Partner Web and public Web site.
B. Grains/Breads

1. During the 2012-2013 school year, one-half of the grains over the week must be whole grain. Whole grains include, but are not limited to, whole-wheat flour, oatmeal, whole cornmeal, and brown rice. The other servings must be made with enriched grains.
2. During SY2012-2013, battered and/or breaded products offered will not need to be counted toward the maximum weekly grains requirement in the meal pattern. Beginning July 1, 2013, all grains, including those that are part of battered and/or breaded products offered must be counted toward the weekly grains requirement.
3. There are three different ways to identify whole grains. (Refer to the Flow Chart for Determining Whole-Grain Creditability on page CM-35 for further assistance.)
a. Whole grains will be listed as the first ingredient on the ingredient label. This indicates that the product is at least 50 percent whole grain.
```
INGREDIENTS: WHOLE GRAIN OATS.MODIFIED
CORN STARCH, CORIV STARCH, SUGAR, SALT,
CALCIUM CARBONATE, OAT FIBER,
TRIPOTASSIUM PHOSPHATE, WHEAT STARCH,
VITAMIN E (MIXED TOCOPHEROLS) ADDED TO
PRESERVE FRESHNESS
```

b. An individual grain serving must provide $\mathbf{8}$ grams OR MORE of whole grain per serving. For purchased grains, program operators can specify that the product label be stamped with the whole-grain stamp.
c. Whole-grain servings may be specified on the CN label.

## CN

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Each 4.5 oz Chicken Stir-Fry Bowl provides 1.5 oz equivalent meat, 1.0 serving of WGR Grains, $1 / 4$ cup dark green vegetable, $1 / 4$ cup red/orange vegetable, and 1/8 CN cup other vegetable for Child Nutrition Meal Pattern Requirements. (Use of this logo and statement authorized by the Food and Nutrition Service, USDA 05/12.)

## CN

4. Labels that verify the whole-grain contribution must be maintained to document that the requirement was met.
a. Grains-based desserts can be used for the grains requirement, but must be limited to two per week. Grainsbased desserts are usually significant sources of solid fats and added sugars. In addition, fortified grains products cannot be used to meet the grains requirement. Reducing these foods will help schools stay within the saturated fat and caloric limits.
b. Once the bread item is determined to meet the whole-grain requirement, then the food item must meet portion size requirements. (Refer to the Grains/Breads Chart on page CM-37 through CM-40 or the USDA Food-Buying Guide.)

## FLOW CHART FOR DETERMINING WHOLE GRAIN CREDITABILITY

Step 1:
Is a whole grain listed as the $1^{\text {st }}$ ingredient in the list of ingredients on the package label?


Step 2:
Determine serving size to meet the meal pattern requirement. Refer to the USDA Food Buying Guide, Exhibit A.

## Common Grains

Five common grains-wheat, corn, oats, rice, and rye—are listed below, along with some of the forms in which they may be purchased.

| Wheat | Corn | Rice |
| :--- | :--- | :--- |
| Whole wheat | Cornmeal | Brown rice |
| Cracked wheat <br> Wheat berries | Corn tortillas | Wild rice |
|  | Corn tortilla chips |  |
| Corn tortilla shells | Other grains: |  |
| Oats | Rye | Amaranth |
| Oatmeal | Rye flakes | Barley |
| Oat flour | Rye flour | Millet |
|  |  | Quinoa |

4. Grains/Breads Chart

Through the 2012-2013 school year, SFAs and program operators refer to:

- Section 3 Grains/Breads of the Food-Buying Guide for Child Nutrition Programs.

SFAs and program operators will be allowed to use old guidance and credit grains products based on the current 14.75 grams of grains per serving through SY2012-2013. Refer to page CM-37 for the 2012-2013 Grains/ Breads chart using 14.75 grams per serving.

Beginning July 1, 2013, as addressed in Grain Requirements for the National School Lunch Program and School Breakfast Program (USDA Policy Memo SP-30-2012), all whole grain-rich products must be credited based on per-ounce equivalent (oz eq) standards. Refer to page CM-39 for the 2013-2014 Grains/Breads chart using 16 grams per serving (Exhibit A).

The oz eq for grains may be determined by using either the weights or volumes listed in Exhibit A, or the SFA may require documentation from a manufacturer certifying the grams of creditable grains per portion for determining the oz eq from a given product.

## 5. Calculating Ounce Equivalents

The contribution of grains in a recipe or product formulation for items listed in Exhibit A, Groups A-G, may be calculated to determine the number of oz eq grains the recipe provides based on 16 grams of grains ingredients per ounce equivalent.

The crediting of a food item as oz eq grains is determined by:

## Grams whole-grain meal and/or flour

or
Grams whole-grain plus enriched meal and/or flour
$\div$

## Number of servings the formulation or recipe yields

$\div$

## 16 grams per oz eq standard

2012-2013 SCHOOL YEAR ONLY GRAINS/BREADS ALTERNATE REQUIREMENTS FOR THE CHILD NUTRITION PROGRAMS ${ }^{1}$
-Serving Size for 6- Through 12-Year-Old Children = 1 serving
-Serving Size for 1 - Through 5-Year-Old Children $=1 / 2$ serving
-Serving Size for Adults $=1$ serving

| GROUPA | MINIMUM SERVING SIZE FOR GROUP A |
| :---: | :---: |
| - Bread-type coating <br> - Breadsticks (hard) <br> - Chow mein noodles <br> - Crackers (saltines and snack crackers) <br> - Croutons <br> - Pretzels (hard) <br> - Stuffing (dry) <br> NOTE: Weights apply to bread in stuffing. | 1 serving $=20 \mathrm{gm}$ or 0.7 oz <br> $1 / 2$ serving $=10 \mathrm{gm}$ or 0.4 oz |
| GROUP B | MINIMUM SERVING SIZE FOR GROUP B |
| - Bagels <br> - Batter-type coating <br> - Biscuits <br> - Breads (white, wheat, whole-wheat, French, Italian) <br> - Buns (hamburger and hot dog) <br> - Crackers (graham crackers-all shapes, animal crackers) <br> - Egg roll skins <br> - English muffins <br> - Pita bread (white, wheat, whole-wheat) <br> - Pizza crust <br> - Pretzels (soft) <br> - Rolls (white, wheat, whole-wheat, potato) <br> - Tortillas (wheat or corn) <br> - Tortilla chips (wheat or corn) <br> - Taco shells | 1 serving $=25 \mathrm{gm}$ or 0.9 oz <br> $1 / 2$ serving $=13 \mathrm{gm}$ or 0.5 oz |
| GROUP C | MINIMUM SERVING SIZE FOR GROUP C |
| - Cookies ${ }^{2}$ (plain) <br> - Cornbread <br> - Corn muffins <br> - Croissants <br> - Pancakes <br> - Pie crust (dessert pies ${ }^{2}$, fruit turnovers ${ }^{3}$, and meat/ meat alternate pies) <br> - Waffles | 1 serving $=31 \mathrm{gm}$ or 1.1 oz <br> $1 / 2$ serving $=16 \mathrm{gm}$ or 0.6 oz |
| GROUP D | MINIMUM SERVING SIZE FOR GROUP D |
| - Doughnuts ${ }^{3}$ (cake and yeast-raised, unfrosted) <br> - Granola bars ${ }^{3}$ (plain) <br> - Muffins (all except corn) <br> - Sweet roll ${ }^{3}$ (unfrosted) <br> - Toaster pastry (unfrosted) | 1 serving $=50 \mathrm{gm}$ or 1.8 oz <br> $1 / 2$ serving $=25 \mathrm{gm}$ or 0.9 oz |

[^0]-Serving Size for 6- Through 12-Year-Old Children $=1$ serving
-Serving Size for 1- Through 5-Year-Old Children = $1 / 2$ serving
-Serving Size for Adults = 1 serving

| GROUP E | MINIMUM SERVING SIZE FOR GROUP E |
| :---: | :---: |
| - Cookies ${ }^{2}$ (with nuts, raisins, chocolate pieces, and/or fruit purees) <br> - Doughnuts ${ }^{3}$ (cake and yeast-raised, frosted or glazed) <br> - French toast <br> - Grain fruit bars ${ }^{3}$ <br> - Granola bars ${ }^{3}$ (with nuts, raisins, chocolate pieces, and/or fruit) <br> - Sweet rolls ${ }^{3}$ (frosted) <br> - Toaster pastry ${ }^{3}$ (frosted) | $\begin{array}{ll} 1 \text { serving } & =63 \mathrm{gm} \text { or } 2.2 \mathrm{oz} \\ 1 / 2 \text { serving } & =31 \mathrm{gm} \text { or } 1.1 \mathrm{oz} \end{array}$ |
| GROUP F | MINIMUM SERVING SIZE FOR GROUP F |
| - Cake $^{2}$ (plain, unfrosted) <br> - Coffee cake ${ }^{3}$ | $\begin{array}{ll} 1 \text { serving } & =75 \mathrm{gm} \text { or } 2.7 \mathrm{oz} \\ 1 / 2 \text { serving } & =38 \text { gm or } 1.3 \mathrm{oz} \end{array}$ |
| GROUP G | MINIMUM SERVING SIZE FOR GROUP G |
| - Brownies ${ }^{2}$ (plain) <br> - Cake ${ }^{2}$ (all varieties, frosted) | $\begin{array}{ll} 1 \text { serving } & =115 \mathrm{gm} \text { or } 4.0 \mathrm{oz} \\ 1 / 2 \text { serving } & =58 \mathrm{gm} \mathrm{or} 2.0 \mathrm{oz} \end{array}$ |
| GROUP H | MINIMUM SERVING SIZE FOR GROUP H |
| - Barley <br> - Breakfast cereals ${ }^{5}$ (cooked) <br> - Bulgur or cracked wheat <br> - Macaroni (all shapes) <br> - Noodles (all varieties) <br> - Pasta (all shapes) <br> - Ravioli (noodle only) <br> - Rice (enriched white or brown) | 1 serving $\quad=\quad 1 / 2$ cup cooked (or 25 gm dry) |
| GROUP I | MINIMUM SERVING SIZE FOR GROUP I |
| - Ready-to-eat breakfast cereal ${ }^{4,5}$ (cold, dry) | $\begin{aligned} 1 \text { serving } & =\begin{array}{l} 3 / 4 \text { cup or } 1.0 \text { oz, whichever is } \\ \text { less } \end{array} \end{aligned}$ |

2 Snack only.
3 Snack and breakfast only.
${ }^{4}$ Refer to the minimum meal pattern requirements for the appropriate serving size for cereals served to children aged one through five and adult participants in the Child and Adult Care Food Program (CACF). Breakfast cereals are traditionally served as a breakfast menu item, but may be served in meals other than breakfast.
5 Cereals may be whole-grain, enriched, or fortified.

## REQUIRED FOR 2013-2014 SCHOOL YEAR <br> EXHIBIT A: UPDATED SCHOOL LUNCH AND BREAKFAST WHOLE GRAIN-RICH OUNCE EQUIVALENCY (OZ EQ) REQUIREMENTS FOR SCHOOL MEAL PROGRAMS ${ }^{1,2}$


${ }^{1}$ The following food quantities from Groups A-G must contain at least 16 grams of whole grain or can be made with 8 grams of whole grain and 8 grams of enriched meal and/or enriched flour to be considered whole grain-rich.
${ }^{2}$ Some of the following grains may contain more sugar, salt, and/or fat than others. This should be a consideration when deciding how often to serve them.
3 Allowed only as dessert at lunch as specified in §210.10.
4 Allowd for desserts at lunch as specified in §210.10 and for breakfasts served under the SBP.

REQUIRED FOR 2013-2014 SCHOOL YEAR

| GROUPE | OZ EQ FOR FOR GROUP E |
| :---: | :---: |
| - Cereal bars, breakfast bars, granola bars ${ }^{4}$ (with nuts, dried fruit, and/or chocolate pieces) <br> - Cookies ${ }^{3}$ (with nuts, raisins, chocolate pieces, and/or fruit purees) <br> - Doughnuts ${ }^{4}$ (cake and yeast-raised, frosted or glazed) <br> - French toast <br> - Sweet rolls ${ }^{4}$ (frosted) <br> - Toaster pastry ${ }^{4}$ (frosted) | 1 ozeq $=692 \mathrm{gm}$ <br> or 2.4 oz <br> $3 / 4 \mathrm{ozeq}$ $=52 \mathrm{gm}$ <br> or 1.8 oz <br> $1 / 2 \mathrm{ozeq}$ $=35 \mathrm{gm}$ <br> or 1.2 oz <br> $1 / 4 \mathrm{ozeq}$ $=18 \mathrm{gm}$ or 0.6 oz |
| GROUP F | OZ EQ FOR FOR GROUP F |
| - Cake ${ }^{3}$ (plain, unfrosted) <br> - Coffee cake ${ }^{4}$ | 1 ozeq $=82 \mathrm{gm}$ <br> or 2.9 oz <br> $3 / 4 \mathrm{ozeq}$ $=62 \mathrm{gm}$ <br> or 2.2 oz <br> $1 / 2 \mathrm{ozeq}$ $=41 \mathrm{gm}$ <br> or 1.5 oz <br> $1 / 4 \mathrm{ozeq}$ $=21 \mathrm{gm}$ |
| GROUP G | OZ EQ FOR FOR GROUP G |
| - Brownies ${ }^{3}$ (plain) <br> - Cake ${ }^{3}$ (all varieties, frosted) | $\begin{aligned} & 1 \mathrm{oz} \mathrm{eq}=125 \mathrm{gm} \\ & \text { or } \\ & 3 / 4 \mathrm{oz} \mathrm{eq}=94 \mathrm{gz} \\ & 1 / 2 \mathrm{oz} \text { oq }=63 \mathrm{gm} \\ & \text { or } \text { or } \\ & 3.3 \mathrm{oz} \\ & 1 / 4 \mathrm{oz}=32 \mathrm{gm} \\ & \text { or } 1.1 \mathrm{oz} \end{aligned}$ |
| GROUP H | OZ EQ FOR FOR GROUP H |
| - Cereal grains (barley, quinoa, etc.) <br> - Breakfast cereals ${ }^{5,6}$ (cooked) <br> - Bulgur or cracked wheat <br> - Macaroni (all shapes) <br> - Noodles (all varieties) <br> - Pasta (all shapes) <br> - Ravioli (noodle only) <br> - Rice (enriched white or brown) | 1 oz eq $=1 / 2$ cup cooked or $1 \mathrm{oz}(28 \mathrm{~g})$ dry |
| GROUP I | OZ EQ FOR FOR GROUP I |
| - Ready-to-eat breakfast cereal ${ }^{5,6}$ (cold, dry) | $\begin{array}{lll} 1 & \text { oz eq } & =1 \text { cup or } 1 \text { oz for flakes and rounds } \\ 1 & \text { oz eq } & =1.25 \text { cups or } 1 \text { oz for puffed cereal } \\ 1 & \text { oz eq } & =1 / 4 \text { cup or } 1 \text { oz for granola } \end{array}$ |

[^1]C. Food Not Found in the Food-Buying Guide

Many purchased, preprocessed foods will not be found in the Food-Buying Guide. These foods do not have a Standard of Identity and include, but are not limited to, pizzas, burritos, egg rolls, and breaded meats. The school must obtain documentation from the food manufacturer to know how to credit the food item toward the meal pattern requirement. The documentation must be referenced on the food production record and maintained in a retrievable manner to document that the planned menu met meal pattern requirements.

1. CN Labeling

The USDA's Agricultural Marketing Service (AMS) has published a list of manufacturers that have met the FNS's Quality Control Program requirements for the Child Nutrition (CN) Labeling Program. Additionally, AMS has provided a list of authorized CN labels issued to these manufacturers since January 2005. These lists will be updated monthly and posted to the FNS CN Labeling Program Web site at: <www.fns.usda.gov/cnd/cnlabeling/ authorized.htm>.

The information in these lists will be provided in search-capable Portable Document Format (PDF) and limited to the following information: CN Identification Number, Federal or Equal to Federal (ETF) Establishment (EST) Number, Product Description, Label Approval Expiration Date, and Company Name (on separate directory list). (Reference USDA Memo TA-05-2010)
a. Items that can be CN-labeled:

- Purchased combination-type foods that contribute significantly to the meal, but creditability data cannot be determined by the ingredient label.
- Juice drinks and juice-drink products that contain a minimum of 50 percent full-strength juice.
b. Yield data from the Food-Buying Guide for Child Nutrition Programs (FBG), Program Aid 1331, is used for calculating a CN-labeled product's contribution toward meal pattern requirements. (Using yields from the FBG will help ensure that various meat/meat alternate items, regardless of cooking methods used or the addition of other ingredients, will be nutritionally equivalent.)
c. CN-labeled product will have the following information printed on the principal display panel of the label:
- Product name
- Ingredient listing in descending order of predominance by weight for all ingredients
- Inspection legend for the appropriate inspection
- Establishment number (for meat, poultry, and seafood items only)
- Manufacturer's or distributor's name and address
- CN label statement

NOTE: CN labels MUST be on the product packaging and MUST NOT be obtained off the Internet.
d. CN label statement must be an integral part of the product label and must include the following information:

- CN logo, which is a distinctive border around the CN statement
- A six-digit product identification number that will appear in the upper right-hand corner of the CN label statement
- The statement of the product's contribution toward meal pattern requirements for the CNP
- A statement specifying that the use of the logo and CN label statement is authorized by USDA/FNS
- The month and year the label was approved by USDA/FNS
e. Advantage of using CN-labeled products:

The product carries a USDA warranty. If an SFA purchases such a product and uses it according to directions, the SFA will not have an audit claim filed against it should state or federal reviewers find that the CN-labeled product does not actually meet the meal pattern requirements claimed on the label.
f. What a CN label does NOT do:

- Guarantee that the $\boldsymbol{F} \boldsymbol{U L} \boldsymbol{L}$ requirement will be met (the product's contribution toward the meal pattern requirements is specified in the CN label statement)
- Assure that a product is good for children
- Assure that children will like the product
- Suggest that products without a CN label are inferior or that CN-labeled products are superior
g. SFA responsibilities concerning CN labels:
- Assure that product received meets specifications and has correct CN number (Provide site managers with appropriate information; e.g., copy of label, dates product will be used.)
- Provide site managers with serving sizes/crediting information


## SAMPLE CNLABELSTATEMENT


a. A product formulation is a statement prepared and certified by a manufacturer of a prepared product declaring appropriate ingredient and crediting information. If a company provides a product formulation statement, a school food authority (SFA) may wish to use the product to meet USDA meal pattern requirements. However, USDA does not monitor product formulation statements for compliance with the product formulation or the Child Nutrition Programs (CNP) meal pattern requirements. The product formulation statement does not carry a USDA warranty, and should state or federal reviewers find that the product did not actually meet meal pattern requirements, an overclaim can be established. Signed product formulation statements could provide the SFA legal recourse with the company should the product contribution be challenged or found to be in error. NOTE: USDA Foods (commodities) that have been processed by USDA do not need a product formulation statement. The information USDA provides for these products is either in a fact sheet or on the packaging of the product. The fact sheets may be obtained by going to [http://www.fns.usda.gov/cnd/Lunch/](http://www.fns.usda.gov/cnd/Lunch/). On the left-hand side, under Search FNS, type Commodity Fact Sheet and select NSLP Commodity Fact Sheets Report or DHS may be contacted at 405-521-3581.
b. CNP directors should not let their desire to offer children a commercially prepared product outweigh their need to obtain proper documentation for the product. If vendors understand that the program will not purchase a product without proper documentation, they will be more accommodating in providing sufficient information.
c. SFAs should be careful not to mistake vendor advertising literature for a product formulation statement. Advertising literature provided by a company may contain valuable information, but it may not be used to support the contribution that a product makes toward the USDA meal pattern requirements.
d. A product formulation statement must satisfy all the following REQUIREMENTS: (See sample forms on pages CM-45 through CM-55.)

- Be on the company's letterhead.
- Provide the product name, as written on the label, and provide other identifying information, such as product code number, portion size/weight, pack, case weight.
- Contain a crediting statement; i.e., a declaration of the contribution of one portion of the cooked product toward meeting USDA meal pattern requirements. This may be combined with the certification statement.
- Contain a certification statement. For example, the certification or crediting statement may read, "I certify that the above information is true and correct and that a 3.25 -ounce serving of the above product [ready for serving] contains two ounces of cooked lean meat/meat alternate when prepared according to product directions."
- Provide sufficient information for purchaser to determine the reasonableness of the crediting statement.
- For meat/meat alternates, the following must also be included:
- Description of creditable ingredients per Food-Buying Guide.
- Ounces per raw portion of creditable ingredient.
— Food-Buying Guide yield/creditable amount.
- Information concerning alternate protein product (APP), if applicable.
- Be signed and dated by a legally authorized representative of the company.
e. SFA responsibilities concerning product formulation statements:
- Prior to purchase, carefully review the product formulation statement to determine the reasonableness of information provided by the manufacturer. There is no easy way to verify the accuracy of information on a product formulation statement.
- Ensure that proper documentation is maintained on each prepared product used to meet USDA meal pattern requirements.
- Assure that product received meets specifications and has correct code number. Provide site managers with appropriate information; e.g., copy of label, product formulation statement, dates product will be used, serving sizes, or crediting information.

NOTE: A commercially prepared meat, poultry, or seafood product combined with alternate protein product (APP) to meet all or part of the meat/meat alternate requirement must include the following statement on the label: "This item contains alternate protein product(s) authorized as an alternative food in the Child Nutrition Programs."
3. Nutrition Facts label or Nutrient Data Form: In order for the State Agency to conduct the required nutrient formulation, a Nutrition Facts label (refer to page CM-56) or a Nutrient Data Form (refer to page CM-57) is required on every product. This does not replace the CN label or product formulation statement because there is no crediting information available.

## PRODUCT FORMULATION STATEMENT FOR MEAT/MEAT ALTERNATE AND ALTERNATE PROTEIN PRODUCT CALCULATIONS

Provide a copy of the label in addition to the following information on company letterhead signed by an official representative of the company.

Product Name: $\qquad$ Code Number: $\qquad$

Manufacturer: $\qquad$ Case/Pack/Count/Portion/Size: $\qquad$
I. Meat/Meat Alternate (M/MA)

Please fill out the chart below to determine the creditable amount of Meat/Meat Alternate.

| Description of Creditable Ingredients <br> Per Food-Buying Guide | Ounces Per Raw <br> Portion of <br> Creditable <br> Ingredient | Multiply | Food-Buying <br> Guide Yield | Creditable <br> Amount* |
| :--- | :---: | :---: | :---: | :---: |
|  |  | X |  |  |
|  |  | X |  |  |
|  | X |  |  |  |
| A. Total Creditable Amount ${ }^{1}$ |  |  |  |  |

*Creditable Amount—Multiply ounces per raw portion of creditable ingredient by the Food-Buying Guide yield.

## II. Alternate Protein Product (APP)

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

| Description of APP, <br> Manufacturer's Name, and Code <br> Number | Ounces Dry APP <br> Per Portion | Multiply | \% of <br> Protein <br> As-Is* | Divide by 18** | Creditable <br> Amount <br> APP*** |
| :--- | :---: | :---: | :---: | :---: | :---: |
|  |  | X | X | $\%$ | $\div$ by 18 |

*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.
1 Total Creditable Amount must be rounded DOWN to the nearest 0.25 oz ( 1.49 would round down to 1.25 oz meat equivalent). Do NOT round up. If you are crediting both M/MA and APP, you do not need to round down in Box A until after you have added the creditable APP amount from Box B.

Total weight (per portion) of product as purchased: $\qquad$
Total creditable amount of product (per portion):
(Reminder: Total creditable amount cannot count for more than the total weight of product.)
I certify that the above information is true and correct and that a $\qquad$ -ounce serving of the above product (ready for serving) contains $\qquad$ ounces of equivalent meat/meat alternate when prepared according to directions.

I further certify that any APP used in the product conforms to the Food and Nutrition Service (FNS) Regulations (7 CFR Parts 210, 220, 225, 226, Appendix A) as demonstrated by the attached supplier documentation (Attachment A).

Signature: $\qquad$ Title:

Printed Name: $\qquad$ Date: $\qquad$ Phone Number: $\qquad$

## ATTACHMENT A

## Company Name:

$\qquad$

## APP Product:

$\qquad$
A. $\qquad$ certifies that $\qquad$ meets all requirements for APP intended for use in foods manufactured for Child Nutrition Programs as described in Appendix A of 7 CFR 210, 220, 225, and 226.
B. $\qquad$ certifies that $\qquad$ has been processed so that some portion of the nonprotein constitutes have been removed by fractionating. This product is produced from
$\qquad$ .
C. The Protein Digestibility Corrected Amino Acid Score (PDCAAS) for $\qquad$ is $\qquad$ .
It was calculated by multiplying the lowest uncorrected amino acid score by true protein digestibility as described in the Protein Quality Evaluation Report from the Joint Expert Consultation of the Food and Agriculture Organization/World Health Organization of the United Nations, presented December 4-8, 1989, in Rome, Italy. The PDCAAS is required to be greater than 0.8 ( 80 percent of casein).
D. The protein level of $\qquad$ is at least 18 percent by weight when fully hydrated at a ratio of
$\qquad$ parts water to one part product.
E. The protein level of $\qquad$ is certified to be at least $\qquad$ on an as-is basis for the aspurchased product. Note: Protein is often provided on a moisture-free basis (MFB), which is not the information Food and Nutrition Service (FNS) requires.

All of the above information is required for APP.

## Reviewer Checklist for Evaluating Manufacturer-Completed Product Formulation Statements for Meat/Meat Alternate (M/MA) Products and Alternate Protein Product Products

| Circle | Steps for Evaluation |
| :--- | :--- |
| Y or $\mathbf{N}$ | Page 1 |

## GENERAL INFORMATION

| $\mathbf{Y}$ | $\mathbf{N}$ | A copy of the product label is attached. <br> The label should have the product name, ingredients statement, net weight, manufacturer/ <br> distributor name and address, and for meat/poultry products, an inspection legend. The <br> Nutrition Facts panel is voluntary for institutional product labels unless a nutrition or health <br> claim is made. |
| :--- | :---: | :--- |
| $\mathbf{Y}$ | $\mathbf{N}$ | Product Name is provided and matches the name on the product label. |
| $\mathbf{Y}$ | $\mathbf{N}$ | Product Code Number is provided and matches the code number on the product label. |
| $\mathbf{Y}$ | $\mathbf{N}$ | Manufacturer name is provided. |
| $\mathbf{Y}$ | $\mathbf{N}$ | Case/pack/count/portion/size are included as applicable. |

## MEAT/MEATALTERNATE

| $\mathbf{Y}$ | $\mathbf{N}$ | I have my copy of the Food-Buying Guide for Child Nutrition Programs (FBG), and it has the <br> written in corrections as noted in the Pen and Ink Changes document provided by FNS. <br> Available at <http://teamnutrition. usda.gov/Resources/foodbuyingguide.html> |
| :---: | :---: | :--- |
| $\mathbf{Y}$ | N | The food items in Section 1. Meat/Meat Alternate match a description in Column 1 (Food As <br> Purchased) of the FBG. <br> Example: Beans, Kidney, dry matches a description in Column 1 of the FBG, but Kidney Beans <br> does not match a description in Column 1 of the FBG (you do not know if the kidney beans are <br> dry, canned, or frozen). |
| $\mathbf{Y}$ | $\mathbf{N}$ | The description does not match Column 1, but it does match a description in Column 4 (Serving <br> Size Per Meal Contribution) or Column 6 (Additional Information) of the FBG. <br> If the answer is $\mathbf{Y}$, then you will need to convert the yield data from Column 6. |


| Circle | Steps for Evaluation |
| :--- | :--- |
| Yor $\mathbf{N}$ | Page 2 |

## MEAT/MEAT ALTERNATE continued

| Y | N | The FBG Yield (servings per purchase unit) provided aligns with the correct description in Column 1, the description of how the food is served in Column 4, and the correct unit for the serving size in Column 4 to provide answers in units of 1 ounce. For meat/poultry, use the percent yield in Column 6. <br> Example 1: A burrito is being evaluated. Kidney beans, dry, canned, whole (pages 1 through 7, FBG) matches a description in Column 1, the product is served heated which matches a description as served in Column 4; therefore, the FBG yield that should be used is 38.9 1/4-cups heated beans for 108 oz No. 10 can (38.9/108). The yield for drained beans (which is unheated) should not be used. For dry beans/legumes/peas/lentils, keep in mind that $1 / 4$ cup cooked, drained beans/legumes/peas/lentils is equivalent to 1.0 oz meat alternate. <br> Example 2: A sandwich is being evaluated. Peanut butter (pages 1 through 40,FBG) matches a description in Column 1, and 2 Tbsp ( 1 oz meat alternate) matches the unit we want our answer in. For this example, there are three acceptable yield ratios: (1) 97.51 -oz servings per 108 oz , (2) 28.81 -oz servings per 28 oz , or (3) 14.41 -oz servings per 16 oz . When purchase units are 1 lb , always use 16 oz in the yield ratio. Do not use the yield ratios for 3 Tbsp peanut butter, since this will put the answer in units of $11 / 2 \mathrm{oz}$. <br> Example 3: A chicken patty is being evaluated. Chicken, boneless, raw (pages 1 through 31, FBG) matches a description in Column 1, cooked matches a description in Column 4. The yield in Column 6 is 70 percent (you will multiply using the decimal form which is 0.70 ). |
| :---: | :---: | :---: |
| Y | N | The answer provided in the Creditable Amount column for each separate ingredient has been verified using a calculator, and the answer was not rounded up. |
| Y | N | The total creditable amount for the meat/meat alternate section, Total A, is correct, and the answer was not rounded up. |
| Y | N | All of the creditable ingredients listed on the form match ingredients listed in the ingredients statement on the product label. <br> Example: It is not acceptable for the documentation to list ground beef (not more than 30 percent fat) if the label only lists beef. This means that the manufacturer does not have to actually use ground beef (not more than 30 percent fat), but can use any type of beef. Beef is not creditable since there is no one single FBG yield that can cover all beef items. Because the correct description is not on the label, the product cannot be accepted with the documentation. |


|  |  | Steps for Evaluation Page 3 |
| :---: | :---: | :---: |
| ALTERNATE PROTEIN PRODUCT (APP) |  |  |
| Y | N | The APPs listed are single ingredients such as soy flour, soy protein concentrate, soy protein isolate, whey protein concentrate, and nonfat dry milk. <br> Examples of ingredients that do not meet the APP requirements are: wheat proteins, tofu, surimi, soy burgers, soy crumbles. |
| Y | N | The product itself is an entrée item or an integral part of an entrée item. <br> Example: entrée items $\boldsymbol{A R E}$ sandwich patties, meat fillings or crumbles, pizzas, burritos, etc. Entrée items are NOT drinks, smoothies, desserts, muffins, cakes, protein bars, bread, chips, etc. |
|  |  | Documentation (Refer to Attachment A) |
| Y | N | The APP documentation is on letterhead of the manufacturer that actually makes the APP. <br> Documentation should not be accepted on distributor letterhead or from the food company making your purchased product (except in the rare case that the food company making the finished product actually manufactures the APP itself). |
| Y | N | a. The documentation states that the APP meets requirements found in 7 CFR Parts 210, 220, 225 , and 226. |
| Y | N | b. The documentation indicates that nonprotein constitutes have been removed. |
| Y | N | c. The PDCAAS (Protein Corrected Amino Acid Score) is provided, and the score is greater than $0.80(80)$. <br> The PDCAAS score should be provided in decimal form (i.e., 0.92), but sometimes the PDCAAS is reported as a whole number (i.e., 92) instead. If the PDCAAS is less than 0.8 (80), then the product does not meet the protein quality requirements and cannot be used for credit even if the percent as-is protein is greater than 18 percent. |
| Y | N | d. The hydration ratio is provided in the documentation and was calculated correctly (percent protein as-is divided by 18) minus 1 part dry APP = parts water). <br> Example: if the percent as-is protein is 64.8 , the calculation is as follows: ([64.8 $\div 18]-1$ part dry APP) $=2.6$ parts water to hydrate the product down to 18 percent protein. The ratio of dry APP:water for this example will be 1:2.6. |
| Y | N | e. The percent protein is provided on an as-is basis and is greater than 18 percent. <br> If the documentation states MFB or moisture-free basis-you cannot use this protein value. The as-is protein value must be used in calculating the meat alternate credit for APP. |


| Circle <br> Yorn |  | Steps for Evaluation <br> Page 4 |
| :---: | :---: | :---: |
| ALTERNATE PROTEIN PRODUCT (APP) continued |  |  |
| Y | N | APP documentation meeting all of the above requirements is provided for each separate APP listed on the product analysis form. |
|  |  | Check the Calculation for Each APP Ingredient Used |
| Y | N | The whole number percent protein (not the decimal form of the percent) is used in the calculation. <br> Example: If the percent as-is protein is 64.8 percent, use 64.8 in the calculation, not 0.648 . |
| Y | N | The answer for each separate APP calculation is correct and was not rounded up. |
| Y | N | The amount of credit from APP, Total B, is correct and was not rounded up. |
|  |  | TOTALCREDITABLEAMOUNT |
| Y | N | The sum of Total A (meat/meat alternate) plus Total B (APP credit) is correct and was not rounded up. |
| Y | N | The total weight per portion of the product is provided and matches portion information provided on the label. |
| Y | N | The total credit is rounded down to the nearest 0.25 ounce. |
| Y | N | The Total Creditable Amount is not greater than the total weight of the portion of the product. (The credit may be equal to or less than the portion weight served.) <br> When using APP with high concentrations of protein, sometimes the calculation provides an answer that is greater than the weight of the product served; in this case, you must reduce the credit so that it is equal or less than the weight of the product served. <br> Example: if a soy burger uses soy isolate and whey protein concentrate and the weight of the heated burger weighs 1.75 oz , but the calculations show a total of 2.3 oz meat alternate, you can only count a maximum of 1.75 oz meat alternate for the burger because that is the weight of the meat alternate food being served. |
|  |  | AUTHORIZATION INFORMATION |
| Y | N | The phone number was called, and the number is valid for the company that manufactures the food product purchased; it is the correct contact number for the name of the person who signed the documentation. <br> Ask for clarifications if needed. |
| Y | N | Overall-the product formulation statement is acceptable without further information. <br> Do not accept products that do not have acceptable documentation. |

## EXAMPLE <br> PRODUCT FORMULATION STATEMENT

I. Meat/Meat Alternate (M/MA)

| Description of Creditable Ingredients Per Food-Buying Guide | Ounces Per Raw Portion of Creditable Ingredient | Multiply | Food-Buying Guide Yield | Creditable <br> Amount* |
| :---: | :---: | :---: | :---: | :---: |
| Beans, black (turtle), dry, canned, whole | 1.0 oz | X | 27.8/110 | 0.252 |
| Beans, black (turtle), dry, canned, whole, drained (Column 6 conversion) | 1.0 oz | X | 27.8/62.0 | 0.44 |
| Beans, kidney, dry, whole | 1.0 oz | X | 24.8/16 | 1.55 |
| Beef, ground (not more than 18\% fat), raw | 1.0 oz | X | 0.74 | 0.74 |
| Beef brisket, without bone, practically free of fat, raw | 1.0 oz | X | 0.69 | 0.69 |
| Cheese, Mozzarella | 1.0 oz | X | 16/16 | 1.0 |
| Cheese, cottage | 1.0 oz | X | 8/16 | 0.5 |
| Chicken, boneless, fresh | 1.0 oz | X | 0.70 | 0.7 |
| Chicken, drumstick with bone, fresh, skin on | 2.0 oz | X | 0.49 | . 098 |
| Egg, frozen whole, pasteurized, liquid | 1.0 oz | X | 18/16 | 1.125 |
| Egg, whole, dried | 0.25 oz | X | 64/16 | 1.0 |
| Fish, fillet, fresh | 1.0 oz | X | 0.70 | 0.7 |
| Ham, water added | 1.0 oz | X | 0.82 | 0.82 |
| Nuts, almonds | 1.0 oz | X | 16/16 | 1.0 |
| Peanut butter | 1.0 oz | X | 14.4/16 | 0.9 |
| Pork, ground (not more than 30\% fat) | 1.0 oz | X | 0.70 | 0.7 |
| Tuna, chunk-style, water-packed | 1.0 oz | X | 51.2/66.5 | 0.769 |
| Tuna, chunk-style, drained (Column 6 conversion) | 1.0 oz | X | 51.2/51.2 | 1.0 |
| Turkey, cooked diced, light and dark meat in natural proportions (no skin, wing meat, neck meat, giblets, or kidneys | 1.0 oz | X | 16/16 | 1.0 |
| Turkey ham, fully cooked | 1.0 oz | X | 0.70 | 0.7 |
| Turkey ham, 15\% water added | 1.0 oz | X | 0.59 | 0.59 |
| Yogurt, plain | 1.0 oz | X | 8/32 | 0.25 |

*Creditable amount-multiply ounces per raw portion of creditable ingredient by the Food-Buying Guide yield.

## II. Alternate Protein Product (APP)

Products containing APP must also provide the documentation described in Attachment A.

| Description of APP, Manufacturer's Name, <br> and Code Number | Ounces <br> Oer Dry APP <br> Per Portion | Multiply | \% of Protein <br> As-Is* | Divide <br> by 18** | Creditable <br> Amount <br> APP*** |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Soy flour, ABComp 1234 | 0.25 oz | X | $52.0^{*}$ | $\div$ by 18 | 0.72 |
| Soy protein concentrate, ABComp 45 | 0.25 oz | X | $64.8^{*}$ | $\div$ by 18 | 0.9 |
| Soy protein isolate, XYComp 333 | 0.25 oz | X | $85.0^{*}$ | $\div$ by 18 | 1.18 |
| Whey protein concentrate, Dairy 3 | 0.25 oz | X | $45.0^{*}$ | $\div$ by 18 | 0.625 |
| Nonfat dry milk, Dairy 789 | 0.25 oz | X | $21.0^{*}$ | $\div$ by 18 | 0.29 |

*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.

# EXAMPLE <br> Soy Company $X$ <br> Soy Protein Concentrate <br> Product $Y$ 

Documentation for Company X Products Used as Alternate Protein Products (APP) for Child Nutrition Programs:
A. Company X certifies that Product Y meets all requirements for APP intended for use in foods manufactured for Child Nutrition Programs as described in Appendix A of 7 CFR 210, 220, 225, and 226.
B. Company X certifies that Product Y has been processed so that some portion of the nonprotein constituents have been removed by fractionating. This product is produced from soybeans by removing the majority of the soybean oil and some of the other nonprotein constituents.
C. The Protein Digestibility Corrected Amino Acid Score (PDCAAS) for Product Y is 0.99 . It was calculated by multiplying the lowest uncorrected amino acid score by true protein digestibility as described in the Protein Quality Evaluation Report from the Joint Expert Consultation of the Food and Agriculture Organization/World Health Organization of the United Nations, presented December 4-8, 1989, in Rome, Italy. The PDCAAS is required to be greater than 0.8 ( 80 percent of casein).
D. The protein level of Product Y is at least 18 percent by weight when fully hydrated at a ratio of 2.43 parts water to one part product.
E. The protein level of Product Y is certified to be at least 61.8 percent on as As-Is basis for the AsPurchased produced. Note: Protein is often provided on a moisture-free basis (MFB), which is not the information Food and Nutrition Service (FNS) requires.

All of the above information is required for APP and must be presented for approval.

Note: It is also helpful to have the ingredients statement for Product Y. For example, if the product is uncolored and unflavored, the ingredients statement might be soy protein concentrate or if the product is colored and textured, the ingredients statement might be textured vegetable protein (soy flour, caramel color).

## PRODUCTFORMULATIONSTATEMENT FOR PREPARED GRAINS/BREADS

Product Name: $\qquad$ Code Number: $\qquad$

Case/Pack/Count/Portion/Size: $\qquad$

Total Weight (Grams or Ounces) of One Ready-to-Eat Serving of Product: $\qquad$
List the exact types and weights of each enriched and/or whole-grain meal, flour, bran, or germ per product serving:

I certify that the above information is true and correct and that one $\qquad$ (specify serving weight) ready-to-eat serving of the specified product contains $\qquad$ serving(s) of Grains/Breads* for the USDA Child Nutrition Programs.

SIGNATURE
TITLE

## PRINTEDNAME

DATE
TELEPHONENUMBER
*For crediting as a Grains/Breads component, FNS Child Nutrition Programs require (1) all grains/breads items must be enriched or whole grain, made from enriched or whole-grain flour. If using a cereal, it must be whole grain, enriched, or fortified. Bran and germ are credited the same as enriched or whole-grain meal or flour; (2) the exact or minimum amount of creditable grains must be documented to assure that 14.75 grams of creditable grains equals one grains/breads serving. Grains/breads may be credited in 1/4-serving increments. See FNS Instruction 783-1, Rev. 2, to equal 1 serving Grains/Breads or FNS Food-Buying Guide, revised November 2001.

## PRODUCTFORMULATIONSTATEMENT FORPREPAREDFRUIT/VEGETABLE

Product Name: $\qquad$ Code Number: $\qquad$
Case/Pack/Count/Portion/Size: $\qquad$

Volume and Weight of One Serving of Product: $\qquad$

- Weight of Total Product Per Batch: $\qquad$
- Number of Portions/Servings Per Batch: $\qquad$
I certify that the above information is true and correct and that one $\qquad$ serving (specify serving volume/weight) of the above product (ready to eat) contains $\qquad$ servings of fruit/vegetable** for the Child Nutrition Programs.


## SIGNATURE

TITLE

TELEPHONENUMBER

[^2]
## EXAMPLE

## PRODUCT FORMULATION STATEMENT FOR MEAT/MEAT ALTERNATE AND ALTERNATE PROTEIN PRODUCT CALCULATIONS

JOJO'S GOOD TIME TREATS, INC.
2211 Savory Taco Drive
Flower Stop, Texas 75000
1-800-555-9999
Provide a copy of the label in addition to the following information on company letterhead signed by an official representative of the company.

Manufacturer: Treat Time

Code Number: $\qquad$

Case/Pack/Count/Portion/Size: $72 \mathrm{Ct} / 6.61 \mathrm{OZ}$

## I. Meat/Meat Alternate (M/MA)

Please fill out the chart below to determine the creditable amount of Meat/Meat Alternate.

| Description of Creditable Ingredients <br> Per Food-Buying Guide | Ounces Per Raw <br> Portion of <br> Creditable <br> Ingredient | Multiply | Food-Buying <br> Guide Yield | Creditable <br> Amount* |
| :--- | :---: | :---: | :---: | :---: |
| Beef, ground, frozen, 30\% fat | $1.250 Z$ | X | X | .70 |
| Beans, pinto, dry, Canned | $10 Z$ | X | 1 | .87502 |
| Cheese, Cheddar, natural | $.190 Z$ |  | 1.00 OZ |  |
| A. Total Creditable Amount ${ }^{1}$ |  |  | .1902 |  |

*Creditable Amount-Multiply ounces per raw portion of creditable ingredient by the Food-Buying Guide yield.

## II. Alternate Protein Product (APP)

If the product contains APP, please fill out the chart below to determine the creditable amount of APP. If APP is used, 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 <br> Amount <br> APP*** |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | \% | $\div$ by 18 |  |
|  |  |  | \% | $\div$ by 18 |  |
|  |  |  | \% | $\div$ by 18 |  |
| B. Total Creditable Amount ${ }^{1}$ |  |  |  |  |  |
| C. TOTAL CREDITABLE AMOUNT ( $\mathrm{A}+\mathrm{B}$ rounded down to nearest $\mathbf{1 / 4} \mathbf{~ o z}$ ) |  |  |  |  |  |

*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.
1 Total Creditable Amount must be rounded DOWN to the nearest 0.25 oz ( 1.49 would round down to 1.25 oz meat equivalent). Do NOT round up. If you are crediting both M/MA and APP, you do not need to round down in Box A until after you have added the creditable APP amount from Box B.

Total weight (per portion) of product as purchased: 6.61 OZ

Total creditable amount of product (per portion): $\qquad$
(Reminder: Total creditable amount cannot count for more than the total weight of product.)
I certify that the above information is true and correct and that a 6.61 -ounce serving of the above product (ready for serving) contains 2 $\qquad$ ounces of equivalent meat/meat alternate when prepared according to directions.

I further certify that any APP used in the product conforms to the Food and Nutrition Service (FNS) Regulations (7 CFR Parts 210, 220, 225, 226, Appendix A) as demonstrated by the attached supplier documentation (Attachment A).
signature: Happy Empanada Title: Regulatory Compliance Manager Printed Name: Happy Empanada_Date: 6/25/10_ Phone Number: (999) 555-5555

# EXAMPLE <br> PRODUCTFORMULATION STATEMENTFOR PREPARED GRAINS/BREADS 

JOJO'S GOOD TIME TREATS, INC.
2211 Savory Taco Drive
Flower Stop, Texas 75000
1-800-555-9999
Product Name: $\qquad$
Treat Time Combination Burrito®
Code Number: $\qquad$

Case/Pack/Count/Portion/Size: $72 \mathrm{Ct} / 6.61 \mathrm{OZ}$

Total Weight (Grams or Ounces) of One Ready-to-Eat Serving of Product: $\qquad$
List the exact types and weights of each enriched and/or whole-grain meal, flour, bran, or germ per product serving: Enriched wheat flour tortilla (1.2 Oz)-made from enriched bleached wheat flour (flour, niacin, reduced iron, thiamine mononitritrate, riboflavin), water, vegetable shortening (partialiy hyarogenated soybean andior cottonseed oils). Contains 2 percent or less of: leavening (baking soda, sodium aluminum sulfate, cornstarch, monocalcium phosphate, and/or sodium acid pyrophosphate), salt, dough conditioners (fumaric acid, sodium metabisulfate), CalCium propionate, and sorbic acid (preservatives).

I certify that the above information is true and correct and that one 6.61 oz (specify serving weight) ready-to-eat serving of the specified product contains $\qquad$ serving(s) of Grains/Breads* for the USDA Child Nutrition Programs.

Happy Empanada
SIGNATURE

## Regulatory Compliance Manager

## TITLE

Happy Empanada

## PRINTEDNAME

*For crediting as a Grains/Breads component, FNS Child Nutrition Programs require (1) all grains/breads items must be enriched or whole grain, made from enriched or whole-grain flour. If using a cereal, it must be whole grain, enriched, or fortified. Bran and germ are credited the same as enriched or whole-grain meal or flour; (2) the exact or minimum amount of creditable grains must be documented to assure that 14.75 grams of creditable grains equals one grains/breads serving. Grains/breads may be credited in 1/4-serving increments. See FNS Instruction 783-1, Rev. 2, to equal 1 serving Grains/Breads or FNS Food-Buying Guide, revised November 2001.

## PRODUCTFORMULATIONSTATEMENT FORPREPAREDFRUIT/VEGETABLE

Product Name: $\qquad$ Code Number: $\qquad$
Case/Pack/Count/Portion/Size: $\qquad$
Volume and Weight of One Serving of Product:

- Weight of Total Product Per Batch:

- Number of Portions/Servings Per Batch: $\qquad$
I certify that the above information is true and correct and that one $\qquad$ serving (specify serving volume/weight) of the above product (ready to eat) contains $\qquad$ servings of fruit/vegetable** for the Child Nutrition Programs.

SIGNATURE
TITLE

## PRINTED NAME

## DATE

TELEPHONENUMBER

[^3]
## NUTRITION FACTS LABEL

New title signals that the label contains the newly required information.

More consistent serving sizes in both household and metric measures, replacing those that used to be set by manufacturers.

Nutrients required on nutrition panel are those most important to the health of today's consumers, most of whom need to worry about getting too much of certain items (fat, for example) rather than too few vitamins or minerals, as in the past.

This label is only a sample. Exact specifications are in the final rules. Source: Food and Drug Administration, 2004.
Sample Label for Macaroni and Cheese
Nutrition Facts


Calories from fat are now shown on the label to help consumers meet dietary guidelines that recommend people get no more than 30 percent of the calories in their overall diet from fat.
\% Daily Value shows how a food fits into the overall daily diet.

Daily values are also something new. Some are maximums, as with fat ( 65 grams or less); others are minimums, as with carbohydrate (300 grams or more). The daily values for a 2000-calorie and a 2500-calorie diet must be listed on the label of larger packages.

## NUTRIENT DATA FORM

1. Product Identification

Product Name:
Brand: $\qquad$
Produce Code:
List Child Nutrition (CN) Label Number, if appropriate:
Is this product in the CN Database? Yes $\square \quad$ No $\square$
2. Package Size and Servings Per Package

Package Size $=$ Grams Pounds $\qquad$ Fluid Ounces $\qquad$
Standard Serving Size = $\qquad$ Fluid Ounces

Number of Servings Per Package = $\qquad$
3. Basis for Nutrient Data

Nutrient data is being given (check one):
As Served $\square \quad$ As Purchased
Analysis is based on (check one):
Per Serving $\square \quad 100$ grams
Weight per serving = $\qquad$ grams

## 4. Individual Values of Nutrients and Dietary Components

If you do not have information on a nutrient, write $\boldsymbol{M}$ or missing. If this product does not contain a particular nutrient, write 0 .


## 5. Fat and Moisture Gain/Loss

When this product is prepared, there is a:
Fat change (+/-) $\qquad$ \% Moisture change (+/1) $\qquad$ \%
6. Special Instructions for Preparation, if appropriate

To prepare this product, the manufacturer recommends: $\qquad$

## NUTRIENT DATA FORM INSTRUCTIONS

USDA has developed this standardized form to help schools obtain information on foods they will be serving to children. They will use this information to develop recipes, analyze menus for nutritional value, and prepare products for lunch or breakfast.

1. Product Identification. List name of product (and brand, if appropriate). Also, list product code if possible. If you know the product has a CN label number, list that as well. Check Yes or No for CN Database.
2. Package Size and Servings for Package. Write in package size as appropriate in grams, pounds, or fluid ounces. Indicate standard serving size and number of servings per package.
3. Basis for Nutrient Data. Indicate with a check mark whether you are submitting nutrient data for this product on an As Served or As Purchased basis. Use the As Served basis for any food that does not have (a) any ingredients added in preparation or (b) any fat absorbed during preparation.

Use the As Purchased basis for any food that (a) has ingredients added in preparation (such as milk, eggs, and oil added to baked product mixes), (b) is prepared by frying, (c) can be prepared in varying ways (for example, a food that can be baked or fried), or (d) gains or loses moisture/fat during preparation.

In addition, indicate whether nutrient analysis is based on 100 grams or per serving. Also, indicate weight per serving.
4. Individual Values of Nutrients and Dietary Components. Please fill out completely, leaving no lines blank. (a) If you have information on a nutrient, write the specific value in the unit of measurement indicated. (b) If you do not have information on a nutrient, write $\boldsymbol{M}$ or missing. (c) If this product does not contain a particular nutrient, write 0.
5. Fat and Moisture Gain/Loss. If you checked As Purchased in Item 3, also fill in this section if there is a fat or moisture change during preparation.
(Fat may be gained or lost in cooking some foods, thereby changing the foods’ nutrient value. Methods of preparation such as breading, frying, or baking affect this fat gain or loss. For example, chicken baked in the oven will lose fat during cooking, while batter-coated or breaded chicken that is deep-fried will gain fat. If fat is absorbed or gained, fat grams and calories from fat will be increased. If fat is lost, fat grams and calories from fat will be decreased.)
6. Instructions for Preparation. If appropriate, indicate instructions such as ingredients to be added, cooking methods, cooking time, and cooking temperature.

## STANDARDIZED RECIPES

A. Standardized recipes are an important part of any well-managed food service program. They are essential to ensure that the planned serving sizes of food items are provided to students. SFAs must develop and use standardized recipes.
B. A standardized recipe may be defined as one that has been tested and adapted for use by a given food service operation and found to produce the same good results, yield, and nutrients every time when the exact procedures are used with the same type of equipment and the same quantity and quality of ingredients.
C. Standardized recipes offer many advantages for school food service. Benefits include:

1. Quality control.
2. Portion and yield control.
3. Cost control.
4. Creativity.
5. Accurate nutrient analysis.
6. Hazard Analysis and Critical Control Points (HACCP) requirements.
D. When is a standardized recipe required? Anytime a food item contains more than one ingredient that contributes to the nutrient content of the meal. These ingredients might include margarine or butter, salt, seasoned salt, etc. Examples of food items needing recipes include toast, seasoned vegetables, scrambled eggs, sandwiches, and salad bars.
E. Each standardized recipe should contain the following information:
7. Yield
8. Serving size
9. Crediting information
10. Ingredient information, including form (fresh, frozen, canned, etc.), fat content, packing medium (water, syrup, fruit juice, etc.)
11. Correct measures, weights, and/or pack
12. Complete preparation and serving procedures
13. CCPs-Critical Control Points
14. Process numbers (optional)
F. Any modifications made to USDA recipes must be documented. A new recipe must be written with the modifications to the USDA recipe.

Recipe Analysis

EXAMPLE
Category: $\frac{\text { MEAT/MEATALTERNATE }}{\text { GRAINS/BREADS }}$

15. TO SERVE, PLACE CORN CHIPS ON PLATE
16. TO SERVE, PLACE CORN CHIPS ON PLATE GRATED CHEESE. AND SPRINKLE WITH
17. $C C P=$ HOLD FOR HOT SERVICE AT $135^{\circ} \mathrm{FOR}$ HIGHER. Yield 100

\(\begin{array}{lc}Recipe: \& CORN CHIP PIE<br>Process \& 2\end{array}\)

EXAMPLE
Recipe Analysis


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## PRODUCTION RECORDS

A. Purpose

1. The CNP production record is a record that documents compliance with the meal requirements for the chosen menu-planning system.
2. The SFA/school district may elect to use a different format that better meets its needs; but it must contain, at a minimum, the required information.
3. Besides meeting federal record-keeping requirements, several other valuable management tools are available from the proper use of this form:
a. Determining trends in student acceptability of the menu items
b. Projecting student participation levels
c. Forecasting quantities of food to purchase
d. Effectively managing menu planning and the scheduling of labor and work assignments
B. Retention

All records concerning the CNP, including this form (or equivalent) and supporting documentation (e.g., CN labels, product formulation statements, nutrition labels, and Nutrient Data Forms), must be retained for a period of three years plus the current year. The records must be retained beyond the three-year period if audit findings have not been resolved.
C. Preparation

Use of food production records should begin prior to meal preparation for the purpose of planning the menu. The records should be completed daily after meal service at the food preparation site to reflect what was actually prepared, including menu changes and/or modifications. Each day's production record must show the quantities prepared for that day of operation.

If a site has extensive menu offerings and/or multiple serving lines, modifying the form or preparing separate records for each serving line may be necessary.

# MENU PLANNING FOOD PRODUCTION RECORD INSTRUCTIONS 

NOTE: Use one record for each line.
Date:
School Site: $\quad$ Record the date (month, day, and year) of the meal service.
Offer versus Serve and Grades Participating:
Indicate if the eating site participates in Offer versus Serve. Record the grades that participate in Offer versus Serve
at the eating site.

Actual Number of Meals Served:
Record the number of meals served to students, adults, and any contract meals.

| Item A: | Menu or Food Item Used and Form |
| :---: | :---: |
|  | Record each menu or food item used and the form of the item (e.g., sliced, chopped, shredded, fresh, frozen, canned, raw), the packing medium (e.g., canned in juice or light syrup, frozen with added sugar or plain), and the method of preparation (e.g., baked or boiled). All offerings, choices, milk, substitutions, condiments, and noncreditable items must be listed to facilitate an accurate nutrient analysis of the menu. |

Item B: Recipe Number, Product Brand, and CN Label Number
Record the recipe number of the menu item if the menu item is made from a recipe. Any menu item that has more than two ingredients combined to make the item must have a standardized recipe (e.g., seasoned or buttered corn, tossed salad, lasagna, rolls, fruit salad, cookies). If the item has been purchased, record the product brand, and/or CN label number, if applicable.

Item C: Total Quantity of All Food Prepared
Record the quantity of each menu or food item prepared for all students, adults, à la carte, and contract meals. Indicate the unit size in very specific terms (i.e., pounds, \#10 cans, number of recipe servings).

Item D: Indicate the Meal Contribution of Each Menu Item

- Meat/Meat Alternate (Mt)
- Fruit (F)
- Vegetable
—Dark Green (DGV)
—Red/Orange (ROV)
—Beans/Peas (Legumes) (LV)
-Starchy (SV)
-Other (OV)
- Grains/Breads (GB)
- Whole Grains (WG)
- Milk (Mk)
- Extra Foods/Condiments (X)

Items E and F: Indicate the internal temperatures of hot and cold foods AND the times they were taken.
Items G, H, and I: Planned Number of Meals
Indicate the total number of reimbursable student meals planned. These figures will be used to conduct a nutrient analysis and, therefore, should not include any cafeteria workers, adults, contract, or à la carte numbers.

Planned Serving Size
Record the serving size of the menu/food item to be served. NOTE: The planned serving size must be the same as the portion size served.

## Planned Number of Servings

Record the total number of servings planned for each menu/food item to be served. If seconds are routinely planned, they are to be recorded in this column and will be included in the nutrient analysis.

Item J: Adult, À la Carte, and Contract Meals
Any adult meals or contract meals served, in addition to any à la carte items served, must be recorded here.
Item K: Leftovers/Comments
Enter the quantity of each menu item left at the end of the meal service. Record if the food was discarded, given out as seconds, or stored for future use. The menu planner may also use this column to record comments about the menu. If any food is left over, this column MUST be used to indicate what happened to the food.
Food Production Record

| Meal Type: | Breakfast $\quad \square$ |  |
| :--- | :--- | :--- |
|  | Lunch | $\square$ |


| (A) <br> Menu or Food Item Used andForm | (B) <br> Recipe \# or Product Brand and CN Label \# | (C) <br> Total Quantity of | (D) <br> Meal Contri | (E) <br> Time and | (F) <br> Time and |  |  |  |  | (I) <br> Grade Group: Planned \# Reimbursable Meals for Students: $\qquad$ $\qquad$ |  | (J) <br> À la Carte, Adults, Contract Meals | (K) <br> Leftovers/ Comments |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  |  |  |  | Planned Serving Size** | Planned \#\# <br> Servings <br> (Including <br> Planed <br> Seconds) | Planned Serving Size** | $\begin{array}{\|c\|} \hline \text { Planned \# } \\ \text { Servings } \\ \text { (Including } \\ \text { Planned Seconds) } \end{array}$ | Planned Serving Size** | Planned \# Servings (Induding Planned Seconds |  |  |
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D. Salad Bars

1. A school may offer a daily salad bar line that offers multiple vegetable subgroups every day as a way to meet the weekly vegetable subgroup requirement.

This is acceptable if the salad bar is available to all children each day and offers all of the required weekly subgroups over the course of the week.
2. The vegetable subgroups offered on a daily salad bar need to be itemized on the production records. All of these items need to be listed on the menu.

Section 201.10(a)(3) of the regulations requires that production and menu records for the meals show how the meals offered contribute to the required food components and food quantities. These records must be examined by the State Agency during the administrative review to ensure the meals offered are reimbursable.
3. Schools that offer salad bars are not required to use specific size serving utensils to meet quantity requirements.

Schools are not required to use specific serving size utensils, but may do so to encourage children to take appropriate food amounts. However, regardless of the serving utensils used, food service staff must ensure that the portions on the student's tray meet the meal pattern requirements. This may be done by training the cashiers to visually identify the correct portions or by preportioning the food items.
4. Salad Bars and Point of Service (PoS)

The memo on salad bars (SP-02-2010—Revised) states, "To ensure that each student's selections from the salad bar meet the required portions for an entrée or food item, the PoS must be stationed after the salad bar. If a school is not able to position the salad bar in a location prior to the PoS, the State Agency may authorize alternatives to the PoS lunch counts." If the fruits and vegetables are located in an approved location beyond the PoS, there must be a system in place to ensure that each reimbursable meal selected by the student includes a fruit or a vegetable and that the total of any fruit or vegetable item selected under Offer versus Serve equals at least $1 / 2$ cup."

## Salad/Food Bar Production Record <br> Instructions

Follow these instructions when the salad/food bar is planned as a menu item or extra offerings rather than a reimbursable meal.

Date: Record the date.
Planned Number of Students and Adults for Salad/Food Bar:
Indicate the total number of students and adults eating from the salad/food bar.
Meal Contribution:
Check the Extra box when the salad/food bar is not being used as any contribution to a reimbursable meal.

Check the Vegetable or Fruit Component box when it is being used as a component toward a reimbursable meal. You will also need to indicate on the production record the planned number of servings and a serving size. Note: Salad/food bar must be monitored when contributing to any part of the reimbursable meal.

Comments: Note any special circumstances regarding meal contribution.
Item A: Food Item Prepared and Form, Recipe Number or Product Brand
Record each menu or food item to be prepared. Record the form of the item (i.e., sliced, chopped, shredded, fresh, frozen, canned, raw), the packing medium (e.g., canned in juice or light syrup, frozen with added sugar or plain), and the method of preparation. Note: Indicate the description of food items based on the Food-Buying Guide, when applicable.

Also, record the recipe name and number of the menu item if the menu item is made from a recipe. Any menu item that has more than two ingredients combined to make the item must have a standardized recipe (e.g., seasoned or buttered vegetables, potato salad). If the item has been purchased, record the product brand and Child Nutrition (CN) label, when applicable.

Item B: Record times and temperatures according to your local HACCP plan.
Item C: Indicate Fruit or Vegetable. Vegetables must be reported by subgroups. Use the following abbreviations: Meat/Meat Alternate (Mt), Fruit (F), Vegetable—Dark Green (DGV), Red/Orange (ROV), Beans/Peas (Legumes) (LV), Starchy (SV), Other (OV), Milk (Mk), Extra Foods/Condiments (X).

Item D: Total Quantity of Food Prepared
Record the exact quantity of each food item to be prepared. Indicate the unit size in very specific terms (i.e., pounds, \#10 cans, dozen).

Item E: Quantity of Food Left Over
Enter the quantity of each food item left at the end of the meal service. Indicate leftovers in a standardized measure.

Item F: Quantity Used on the Salad/Food Bar
Subtract Item D from Item C, and record quantity.
Item G: Comments

Enter the quantity of each item left at the end of the meal service. Record if the food was discarded or stored for future use. The menu planner may also use this column to record comments about the food item.

## SALAD/FOOD BAR PRODUCTION RECORD

Date: $\qquad$ Planned Number of Students and Adults for Salad/Food Bar: $\qquad$

|  | Meal Contribution |
| :--- | :--- |
| $\square$ Extra |  |
| $\square$ Vegetable Component $\quad$ Serving Size |  |
| $\square$ Fruit Component | Serving Size |
| $\square$ |  |

NOTE: Use this form ONLY when the salad/food bar is planned as a menu item or extra offerings rather than a reimbursable meal.

| (A) <br> Food Item Prepared/What Form Recipe Number or Product Brand | (B) <br> Time <br> and <br> Temp | (C) <br> Meal <br> Contribution | (D) <br> Total Quantity <br> of Food <br> Prepared <br> (Ib or qty) | (E) <br> Quantity <br> of Food <br> Left Over <br> (lb or qty) | (F) Quantity Used on the Salad/ $/$ Food Bar | (G) <br> Comments |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
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## E. Multiple Lines

If a school has multiple serving lines, a daily production record must be maintained for each. Each serving line must offer all vegetable subgroups and meet minimum and maximum of all required food components.

## F. Lines With Multiple Main Dishes

Lines with multiple main dishes may be recorded on one daily food production record if the same fruits and vegetables are available to students on that line. See example on page CM-73 for K-5 grade grouping for meat/meat alternate and grains/breads. The fruit and vegetable items that are offered are the same for each option.

## Line With Multiple Main Dishes K-5 Meal Pattern

| Component | Food Item |  | Serving Size | Total Servings-Sample Menu |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Meat/Meat <br> Alternate <br> 8-10 ounce equivalent <br> (oz eq) weekly/ <br> 1 ounce equivalent (oz eq) daily | Option 1 | Option 2 |  | Option 1 | Option 2 |
|  | M Chicken Burger | M Grilled Cheese | Mon $2 \mathrm{oz}, 1 \mathrm{oz}$ | 2 oz eq Chicken | 1 oz eq Cheese |
|  | T Marinara With Beef | T Lowfat Yogurt | Tues $2 \mathrm{oz}, 4 \mathrm{oz}$ | 2 oz eq Beef | 1 oz eq Yogurt |
|  | W Chicken Fajita | W Beef Burrito | Wed $2 \mathrm{oz}, 2 \mathrm{oz}$ | 2 oz eq Chicken | 2 oz eq Beef |
|  | Th Ginger Chicken With Citrus Glaze | Th Braised Tofu | Thurs $2 \mathrm{oz}, 2 \mathrm{oz}$ | 2 oz eq Chicken | 2 oz eq Tofu |
|  | F Cheese Pizza | F Chef's Salad | Fri $2 \mathrm{oz}, 2 \mathrm{oz}$ | 2 oz eq Cheese | 2 oz eq C Salad |
|  |  |  |  | TOTAL: (MAX) <br> 10 oz eq | TOTAL: (MIN) <br> 8 oz eq |


| Component | Food Item |  | Serving Size | Total Servings-Sample Menu |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Grains <br> 8-9 ounce equivalent (oz eq) weekly/ <br> 1 ounce equivalent (oz eq) daily | Option 1 | Option 2 |  | Option 1 | Option 2 |
|  | M Whole-Grain Bun | MWhole-Wheat <br>  <br> Bread | Mon 1 ea, 2 slices | 2 oz eq Bun | 1 oz eq Bread |
|  | T Whole-Grain Noodles | T Whole-Grain Roll | Tues 1/2 cup, 1 ea | 2 oz eq Noodles | 1 oz eq Roll |
|  | W Tomato-Basil Tortilla | W Flour Tortilla | Wed $1 \mathrm{ea}, 1 \mathrm{ea}$ | 2 oz eq Tortilla | 2 oz eq Tortilla |
|  | T h Whole-Grain Rice | T h Whole-Grain Roll | Thurs 1/2 cup, 1 ea | 2 oz eq Rice | 2 oz eq Roll |
|  | F Pizza Crust | F Whole-Grain Roll | Fri 1 ea, 1 ea | 2 oz eq Crust | 2 oz eq Roll |
|  |  |  |  | TOTAL: (MAX) <br> 10 oz eq | $\begin{aligned} & \text { TOTAL: (MIN) } \\ & 9 \text { oz eq } \end{aligned}$ |


| Component | Food Item | Serving Size | Total Servings-Sample |
| :---: | :---: | :---: | :---: |
| Fruits <br> 2 1/2 cups weekly/ <br> 1/2 cup daily | M Fresh banana or raisins <br> T Fresh orange or sliced peaches <br> W Fresh, seedless grape bunches or sliced pears <br> Th Fresh apple slices or pineapple juice <br> F Fresh kiwi or pineapple | Mon $1 / 4$ cup <br> Tues $1 / 2$ cup <br> Wed $1 / 2$ cup <br> Thurs $1 / 2$ cup <br> Fri $1 / 2$ cup | $\begin{aligned} & 1 / 4 \operatorname{cup} \\ & 1 / 2 \operatorname{cup} \\ & 1 / 2 \operatorname{cup} \\ & 1 / 2 \operatorname{cup} \\ & 1 / 2 \operatorname{cup} \\ & \text { TOTAL: } \quad 21 / 4 \text { cups } \end{aligned}$ |



| Component | Food Item | Serving Size | Total Servings-Sample |
| :--- | :--- | :--- | :--- |
| Milk <br> 5 cups weekly/ <br> 1 cup daily | Fat-free milk, flavored or unflavored each day | All day, 8 ounces <br> $(1$ cup $)$ | 8 cups weekly |

## OFFER VERSUS SERVE

A. Offer versus Serve $(\mathrm{OvS})$ was established by USDA regulations in order to reduce plate waste by giving students the option to decline food items. The SFA decides whether to implement Offer versus Serve and in what grades.
B. Offer versus Serve is required at lunch in senior high schools and optional for all other grades. Offer versus Serve is not required for any grade if the institution is a residential child care institution (RCCI).
C. If a district participates in Offer versus Serve, it is reported on the annual contractual agreement with the State Agency.
D. Students must be offered a lunch that contains:

1. Five food components (grains/breads, meat/meat alternate, fruit, vegetable, and milk).
2. Students MUST take at least three of the five food components.
3. Students must select at least one-half cup fruit and/or vegetable. This requirement can be met if the student selects one-fourth cup of fruit and one-fourth cup of vegetable.
4. The meal must be priced as a unit.
5. Students must take the full planned servings for food components to count toward a reimbursable meal (except students only require one-half cup of fruit and/or vegetable).
6. Students may decline any food component, including the main dish or milk. However, the student must take one-half cup fruit and/or vegetable.
7. The five items at lunch include:

- Meat/Meat Alternate.
- Grains/Breads.
- Fruits.
- Vegetables.
- Milk.
E. Offer versus Serve-Traditional Food-Based Menu Planning for Breakfast

1. Schools must offer at least the minimum serving sizes for the appropriate age/grade group of all four food items from three or four food components.
2. Students must select at least three food items in at least the minimum serving size for the appropriate age/grade group.
3. Students must take full servings to count toward a reimbursable meal.
4. Students may decline any food item, including milk.
5. Breakfast must be priced as a unit.
6. The breakfast food components include:

- Milk(Mk)
- Juice/Fruit/Vegetable (V/F)
- Grains/Breads (G/B)

AND/OR

- Meat/Meat Alternate (Mt)

7. The four items at breakfast are:

- 1 serving of Milk
- 1 serving of Juice/Fruit/Vegetable
- 2 servings of Grains/Breads

AND/OR

- 2 servings of Meat/Meat Alternate

OR

- 1 serving of Grains/Breads and 1 serving of Meat/Meat Alternate

OR

- An equivalent combination of Grains/Breads and Meat/Meat Alternate

NOTE: The SFA may choose to offer a smaller serving size of any item, but it would not contribute toward the reimbursable meal.

# OFFER VERSUS SERVE (OvS) for Breakfast 

Under New Meal Patterns

## (New Breakfast Required School Year 2013-2014)

- Offer daily 3 food components
- 1. Grains/Breads

2. Fruits or Vegetables
3. Milk
4. Additional Food Item

- Offer 4 food items
- Student may decline 1 of the 4 items
- Student must select $1 / 2$ cup fruit
- Other 2 items must be selected in quantity planned
F. School Nutrition Staff Roles Relating to Offer versus Serve


## 1. Menu Planners

- Use cycle menus.
- Plan consistent number of menu items daily.
- Use forecasting to plan food quantities.
- Communicate menus to other staff.
- Educate students and teachers about OvS.

2. Servers

- Display food choices clearly, attractively.
- Encourage students to select a complete meal via:
- Enthusiastic comments.
- Age-appropriate merchandising.

3. Cashiers (This may not be the cashier, but the person who is monitoring students' trays to ensure reimbursable meals.)

- Review the planned menu:
- Menu items
- Serving sizes
- Reimbursable meals
- Remind students of choices and unit price.
- Practice!


## 4. Cooks

- Prepare foods according to standardized recipes.
- Portion foods accurately.
- Keep accurate menu production records.
G. Teaching Students About Offer versus Serve

1. Concerns

- Number of components to select
- Portion sizes
- Pricing

2. Strategies

- Encourage students to select complete meals.
- Use age-appropriate materials (posters, table tents, other signs) at the point of service.
- Promote consistent, key messages.
- Give hands-on demonstrations.
- Enlist teachers' help.
- Remind them again and again.


## H. Offer versus Serve—Additional Information

1. Offer versus Serve will continue to be a requirement in the NSLP for senior high schools and is an option for lower grade schools. It is also an option for the SFA for all schools in the SBP. Under OvS, schools must offer all the required food components and quantities and students are required to select at least three full components in the NSLP and SBP, with exceptions as noted below:
a. NSLP: In the NSLP, schools must offer five food components (milk, fruits, vegetables, grains, and meat/ meat alternates). Students are allowed to decline two of the five required food components but must select at least one-half cup of either a fruit or a vegetable. Students must select the other food components in the quantities planned.
b. SBP: In order to carry out the OvS option in the SBP, schools must offer three food components (milk, fruits, and grains) that consist of a minimum of four food items. Students are allowed to decline one food item but must select at least one-half cup of fruit. Students must select the other food components in the quantities planned.
2. A student may select a one-half cup that consists of different fruits (e.g., fruit salad) or different vegetables (e.g., mixed vegetables) or a combination of only fruits and vegetables (e.g., carrot/raisin salad). Keep in mind that the one-half cup allowance for fruit or vegetable may be used only once for either the fruits or the vegetables component in a meal, so the other food components selected by the student under OvS must be full components.
3. Although fruits and vegetables are separate components in the meal patterns, the OvS requirement to select at least one-half cup of fruits or vegetables daily for a reimbursable meal may be met if the student selects onefourth cup of fruits and one-fourth cup of vegetables. This is another way to promote the consumption of fruits and vegetables among children. The student would not be required to select additional fruits or vegetables if the reimbursable meal under OvS includes two other components in full.
4. Under OvS, students must select at least one-half cup of either the fruit or the vegetable component or a onehalf cup combination of both components (one-fourth cup fruits and one-fourth cup vegetables) for a reimbursable meal. If a student selects only three components and two of these three components are fruits and vegetables, the student may select one-half cup of either fruit or vegetable, but then must select the full component of the other.

For example, if a student in Grades 9-12 selects just milk, fruit, and vegetables, the student may take one-half cup of the vegetable but must take the full one-cup offering of the fruit. However, if the student selects another full component, such as a grains component or meat/meat alternate, the student may take a smaller portion of the fruit because the fruit is no longer being counted as the third component in the reimbursable meal.
5. SFAs must plan meals in the NSLP and SBP to meet all meal requirements and provide required amounts of food for all students. Menu planners should take into account participation and selection trends to determine what and how much food to offer students. Careful menu planning will ensure that students have access to all of the required food components for the reimbursable meal and minimize food waste.
6. The number of components that may be declined at lunch under OvS is the same for all age/grade groups.

## FOOD SAFETY/HACCP

## A. Hazard Analysis and Critical Control Point (HACCP) System (Reference All State Directors' Memo 2005-SP-21)

Section 111 of the Child Nutrition and WIC Reauthorization Act of 2004 (Public Law 108-265) amended Section 9(h) of the Richard B. Russell National School Lunch Act by requiring SFAs to implement a food safety program for the preparation and service of school meals served to children in the school year beginning July 1, 2005. The program must be based on HACCP principles and conform to guidance issued by USDA. All SFAs must have had a fully implemented food safety program no later than the end of the 2005-2006 school year. (Reference USDA Guidance on Developing a School Food Safety Program Based on the Process Approach to HACCP Principles—June 2005)

HACCP is a systematic approach to construct a food safety program designed to reduce the risk of foodborne hazards by focusing on each step of the food production process-receiving, storing, preparing, cooking, cooling, reheating, holding, assembling, packaging, transporting, and serving. The purpose of a school food safety program is to ensure the delivery of safe foods to children in the school meals program by controlling hazards that may occur or be introduced into foods anywhere along the flow of the food from receiving to service (food flow).

There are two types of hazards: (1) ones specific to the preparation of the food, such as improper cooking for the specific type of food (beef, chicken, eggs, etc.) and (2) nonspecific ones that affect all foods, such as poor personal hygiene. Specific hazards are controlled by identifying CCPs and implementing measures to control the occurrence or introduction of those hazards. Nonspecific hazards are controlled by developing and implementing Standard Operating Procedures (SOPs).
B. The Healthy, Hunger-Free Kids Act of 2010 (the Act), Public Law 111-296, strengthens the existing food safety requirements in the NSLP, SBP, and all other FNS programs operated in a school. The purpose of this memorandum is to provide guidance on the implementation of the statutory requirement. (Reference: USDA Policy Memo SP-372011)

Section 302 of the Act amends Section 9(h)(5) of the Richard B. Russell National School Lunch Act (42 U.S.C. $1758[\mathrm{~h}][5]$ ) by requiring that the school food safety program based on HACCP principles be applied to any facility or part of a facility in which food is stored, prepared, or served for the purposes of the NSLP, SBP, or other FNS program. The school food safety program, required since 2004, addresses food safety in all aspects of school meal preparation, ranging from procurement through service. FNS anticipates that only minor modifications to existing food safety programs will be needed in order to meet this requirement.

Food safety programs must be reviewed to ensure that standard operating procedures for safe food handling are updated to include any facility or part of a facility where food is stored, prepared, or served, such as on school buses, in hallways, school courtyards, kiosks, classrooms, or other locations outside the cafeteria. This requirement applies to school breakfast or lunch meals and the Special Milk Program (SMP), the Fresh Fruit and Vegetable Program (FFVP), and After-School Snack or Supper Programs (ASSP).
C. Developing a School Food Safety Program

1. Before developing your food safety program, you should review the food service operations within your SFA and describe the facility, functions, and standard procedures for each. Some basic information to consider when doing this initial review includes:

- Types of facilities in your SFA
- Existing SOPs
- Number and type of employees at each site
- Types of equipment
- Processes for food preparation
- Menu items

2. Three main points are essential to developing this program:

- Sanitation-Be sure that all of your food preparation areas are clean and sanitary, such as workers' hands, utensils, and food contact surfaces. Avoid cross contamination.
- Temperature control—Be sure to keep cold foods cold and hot foods hot. Cook to proper temperatures, and hold at proper temperatures; be sure to record those temperatures. A basic, properly calibrated food thermometer (digital or dial) is all you need to check for proper temperatures.
- SOPs—They can be used both for sanitation and to verify that proper temperatures are being observed as well as other aspects of a foodservice operation. The NFSMI has a template available for SOPs.

3. An example of a Food Safety Program plan may be found in the USDAHACCP Guidance. Go to <www.sde.ok.gov>. After logging on, select Services and highlight Federal Programs. Click on Child Nutrition; click on Documents; and scroll down to School Meal Program—Various Documents/Forms.
D. Requirements for a Food Safety Program

The SFA is responsible for developing a comprehensive food safety program for its jurisdiction, including a plan for every school food preparation and service site. A school food safety program must include the following elements.

1. Develop, Document, and Implement SOPs

SOPs lay a strong foundation for your overall school food safety program. SOPs are step-by-step written instructions for routine food service tasks that affect the safety of food (NONSPECIFIC hazards), such as proper dishwashing procedures, or for tasks that are a part of the HACCP-based plan (specific hazards), such as proper cooking procedures. Each SOP should include instructions on monitoring, documentation, corrective actions, and periodic review of the procedures they cover. Adherence to SOPs allows food service managers and employees to effectively control and prevent hazards.

SFAs may already have SOPs developed and in place. If not, the NFSMI has developed a series of SOPs applicable to school food service establishments. The final versions of these SOPs are posted on the NFSMI Web site. Log on to [http://www.NFSMI.org/](http://www.NFSMI.org/), then click on Document Library on the upper right-hand side of the page, then click on Item 3, Subject Index, then click on Food Safety. Scroll down to Food Safety Standard Operating Procedures, and select the SOP desired. These SOPs include critical limits as well as monitoring, corrective action, verification, and record-keeping procedures and may be customized to fit your particular foodservice operation. The main categories of SOPs with some example topics for school foodservice are listed below.
a. General safety considerations

- Prohibit bare hand contact with ready-to-eat (RTE) foods.
- Store chemicals away from food and food-related supplies.
b. Personnel
- Require handwashing after restroom use, sneezing, coughing, or after performing any cleaning activity.
- Develop a policy for restricting or excluding ill employees from food production or preparation areas.
c. Product procurement
- Follow recommendations for selecting vendors such as those found in state distributing agency vendor certification procedures.
- Develop buyer product specifications.
d. Receiving
- Reject all cans with swollen sides or ends, flawed seals and seams, rust, or dents.
- Put perishable foods into the refrigerator or freezer immediately.
e. Storing
- Store all food and paper supplies six to eight inches off the floor.
- Label all food with name of the school and delivery date.
f. Transporting
- Preheat transfer carts prior to use.
- Limit transport travel time to a maximum of two hours.
g. Holding
- Keep hot foods hot (above $135^{\circ} \mathrm{F}$ [Oklahoma Health Department requirement]) and cold foods cold (below $41^{\circ} \mathrm{F}$ ).
h. Preparation
- Do not keep food in the danger zone (between $41^{\circ} \mathrm{F}$ and $135^{\circ} \mathrm{F}$ ) for more than four hours.
- Handle food with utensils; clean, gloved hands; or clean hands. (Bare-hand contact with food during preparation should be limited. Bare-hand contact with RTE foods should be prohibited.)
i. Cleaning/Sanitizing
- Use clean water, free of grease and food particles.
- Keep wiping cloths in sanitizing solution while cleaning.
j. Cooking and documenting temperatures
- Record all temperatures when they are taken.
- Use only a clean and sanitized thermometer when taking internal temperatures of foods.
k. Cooling
- Cool rapidly by storing food in small batches in individual containers; cover loosely so that heat can escape quickly.
- Keep cold foods cold by prechilling ingredients for salads.
l. Reheating
- Transfer reheated food to hot-holding equipment only when the food reaches the proper temperature.
- Use only cooking ranges, ovens, steamers, and microwave ovens to reheat foods. Use hot-holding equipment only to maintain temperature and not for rapidly heating food.

2. Written plan at each school food preparation and service site for applying HACCP principles
a. Assigning menu items in the appropriate HACCP process category

USDA recommends that SFAs use the Process Approach to HACCP because it gives them flexibility to create a program suitable for a variety of situations. The Process Approach, originally developed by FDA for retail food establishments, categorizes food preparation into three broad categories based on how many times each menu item moves through the temperature danger zone.

To assign menu items to one of the three processes, consider the processes and procedures used to prepare the food in each of your school district's facilities. Determine whether menu items have no cook step involved, undergo a cook step for same-day service, or receive additional cooling and reheating following a cook step. This will enable you to place each menu item into the appropriate process. Identify the number of times each menu item goes up (heating) or comes down (cooling) through the danger zone $\left(41^{\circ} \mathrm{F}-135^{\circ} \mathrm{F}\right)$, and classify items into the following food preparation processes:

- Process 1—No Cook

The menu item does not go completely through the danger zone in either direction.

- Process 2—Same-Day Service

The menu item takes one complete trip through the danger zone (going up during cooking) and is served.

- Process 3-Complex Food Preparation

The menu item goes through both heating and cooling, taking two or more complete trips through the danger zone.

You should document the appropriate process for each menu item. This can be done in a variety of ways, including writing the process number directly on the recipe or developing a list of menu items in each of the processes.
b. Identifying control measures and CCPs

The control measures that are absolutely essential must be applied at key points, known as CCPs, during the food preparation process to control specific hazards (physical, chemical, or biological). ACCP is a key point where a step can be taken to prevent, eliminate, or reduce a food safety hazard to an acceptable level.

You must document in writing the CCPs and critical limits for each process approach category in your food safety program and in each site plan. Each of the three processes in the process approach has specific CCPs (such as cooking, cooling, hot holding, cold holding, and reheating). The CCPs for each of the processes will remain the same regardless of the menu item. However, the critical limits will vary, depending upon the menu item and the recipe used to prepare each item. Critical limits for cooking, hot holding, and reheating are demonstrated on the following Temperature Rules chart:

## TEMPERATURE RULES! Cooking for Food Service

## Minimum Temperatures and Holding Times

$\mathbf{1 6 5}^{\circ} \mathbf{F}$ (15 seconds)

- Poultry-chicken, turkey, duck, goose-whole, parts, or ground
- Soups, stews, stuffing, casseroles, mixed dishes
- Stuffed meat, poultry, fish, and pasta
- Leftovers (to reheat)
- Food, covered, cooked in microwave oven (hold cover 2 minutes after removal)
$\mathbf{1 5 5}^{\circ} \mathbf{F}$ (15 seconds)
- Hamburger, meatloaf, and other ground meats; ground fish*
- Fresh shell eggs—cooked and held for service (such as scrambled)*
$\mathbf{1 4 5}^{\circ} \mathbf{F}$ (15 seconds)
- Beef, corned beef, pork, ham—roasts (hold 4 minutes)*
- Beef, lamb, veal, pork-steaks or chops


## *Reheat Foods to the Proper Temperature!

- Reheat food within 2 hours to an internal temperature of $165^{\circ} \mathrm{F}$ for 15 seconds.
- Discard foods not reheated to $165^{\circ} \mathrm{F}$ within 2 hours.


## Hold All Hot Food at $135^{\circ}$ F or <br> Above <br> After Cooking!

- Fish, shellfish
- Fresh shell eggs—broken, cooked, and served immediately $\mathbf{1 4 0}^{\circ} \mathbf{F}$ (15 seconds)
- Ham, other roasts—processed, fully cooked (to reheat)
- Fruits and vegetables that are cooked

The following are CCPs, related to each food preparation process:

- For Process 1—No Cook
- Cold holding or limiting time in the danger zone to inhibit bacterial growth and toxin production (e.g., limiting time would be holding at room temperature for four hours and then discarding)
- For Process 2—Same-Day Service
- Cooking to destroy bacteria and other pathogens
- Hot holding or limiting time in the danger zone to prevent the outgrowth of spore-forming bacteria
- For Process 3-Complex Food Preparation
- Cooking to destroy bacteria and other pathogens
- Cooling to prevent the outgrowth of spore-forming bacteria
- Hot and cold holding or limiting time in the danger zone to inhibit bacterial growth and toxin formation
- Reheating for hot holding, if applicable

USDA's Recipes for Schools include CCPs and critical limits. These recipes are available through the NFSMI Web site at [http://www.nfsmi.org](http://www.nfsmi.org). Click on Document Library on the upper right-hand side, then click on Item 3, Subject Index, then click on Recipes, and scroll down to USDA Recipes for Schools. Having the recipes on file and following the recipes exactly will fulfill the requirement for documenting CCPs and critical limits within the process approach specifically for these recipes. Any other recipes, local or otherwise, that are not USDA's must have CCPs and critical limits.
c. Establish monitoring procedures

Employees must be trained in what is required by HACCP. Monitoring is an important step for an effective food safety program. Control measures, including CCPs and SOPs, must be monitored, controlled, and documented in writing. Monitoring involves making direct observations or taking measurements to see that the food safety program is being followed. Monitoring will identify when there is a loss of control so that corrective action can be taken. In establishing your monitoring procedures, consider the following questions:

- How will you monitor CCPs and SOPs?
- When and how often will you monitor?
- Who will be responsible for monitoring?
- Who will be responsible for documenting the Food Safety Checklist?
d. Establishing and documenting corrective actions

Whenever a critical limit is not met, a corrective action must be carried out immediately. A corrective action may be simply continuing to heat food to the required temperature. Other corrective actions may be more complicated, such as rejecting food items that were not delivered at the right temperature or discarding food that has been held without temperature control too long. Your food safety program must include corrective actions. Employees must know what these corrective actions are and be trained in making the right decisions.
e. Record keeping

There are certain written records or kinds of documentation that are needed to verify that the food safety program is working. These records will normally involve the food safety plan and any monitoring, corrective action, or calibration records produced in the operation of the food safety program based on HACCP principles. Record keeping also provides a basis for periodic reviews of the overall food safety program. In the event your operation is implicated in a foodborne illness, documentation of activities related to monitoring and corrective actions can provide proof that reasonable care was exercised in the operation of your facility.

Maintain records of cooking, cooling, and reheating temperatures and other CCPs in the food preparation process. Keep documentation as simple as possible to make record keeping easy for employees. You do not necessarily need to develop new records. For example, you may use existing paperwork such as delivery invoices for documenting product temperature when receiving food items. Determine what records must be kept, where to keep them, and which staff members will be responsible for maintaining them. Some of the types of records that should be maintained include:

- Records documenting the SOPs
- Time and temperature monitoring records
- Corrective action records
- Verification or review records
- Calibration records
- Training logs
- Receiving logs
f. Review and revise periodically

Review and revise your food safety program at least annually or as often as necessary to reflect any changes in your facility. These may include new equipment, new menu items, reports of illness or comments on health inspections, or other factors that indicate how well your food safety program is working. Determine who will review the current plan, when it will be done, and how it will be documented.
E. Emergency Procedures-Food Loss

During a power outage, a freezer temperature of $10^{\circ} \mathrm{F}$ or below is still considered a hard freeze. Therefore, if the freezer temperature stays below $10^{\circ} \mathrm{F}$, food may still be kept in the freezer and used at a later date.

Most freezers will lose one degree per day without power if the freezer door stays shut. Sites must continue to check the temperature daily to avoid using foods not kept at the correct temperature.

If the temperature of the freezer rises above $10^{\circ} \mathrm{F}$, then the food should be moved to a refrigerator and used within seven days.

When a site has food that it feels should not be used, the SFA should call the Food Sanitation Office of the Oklahoma State Health Department at 405-271-5243 and the Food Distribution Agency at 405-521-3581. The Health Department can schedule a county official to come out to the site and help the site dispose of the food and document the amount of food lost. This will give the site the documentation necessary for commodity replacement and insurance purposes for purchased foods.

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## FOOD SAFETY CHECKLIST

Date: $\qquad$ Observer:

Directions: Use this checklist according to the instructions in your SOPs, if applicable. Determine areas in your operations requiring corrective action. Record corrective action taken, and keep completed records in a notebook for future reference.

## PERSONAL HYGIENE

- Employees wear clean and proper uniform, including shoes.
- Effective hair restraints are properly worn.
- Fingernails are short, unpolished, and clean (no artificial nails).
- Jewelry is limited to a plain ring such as a wedding ring, a watch, and no bracelets.
- Hands are washed properly, frequently, and at appropriate times.
- Burns, wounds, sores or scabs, or splints and bandages on hands are completely covered with a glove while handling food.
- Eating, drinking, chewing gum, smoking, or using tobacco are allowed only in designated areas away from preparation, service, storage, and all washing areas.
- Employees use disposable tissues when coughing or sneezing and then immediately wash hands.
- Employees appear in good health.
- Hand sinks are unobstructed, operational, and clean.
- Hand sinks are stocked with soap, disposable towels, and warm water.
- A handwashing reminder sign is posted.
- Employee restrooms are operational and clean.


## FOOD PREPARATION

- All food stored or prepared in facility is from approved sources.
- Food preparation, equipment, and food contact surfaces are properly washed, rinsed, and sanitized before every use.
- Frozen food is thawed under refrigeration, cooked to proper temperature from frozen state, or in cold running water.
- Thawed food is not refrozen.
- Preparation is planned so ingredients are kept out of the temperature danger zone to the extent possible.


## FOOD PREPARATION (Continued)

- Food is tasted using the proper procedure.
- Procedures are in place to prevent crosscontamination.
- Food is handled with suitable utensils, such as single-use gloves or tongs.
- Food is prepared in small batches to limit the time it is in the temperature danger zone.
- Clean, reusable towels are used only for sanitizing equipment surfaces and not for drying hands, utensils, floor, etc.
- Food is cooked to the required safe internal temperature for the appropriate time. The temperature is tested with a calibrated food thermometer.
- The internal temperature of food being cooked is monitored and documented.


## HOT HOLDING

- Hot holding unit is clean.
- Food is heated to the required safe internal temperature before placing in hot holding. Hot holding units are not used to reheat potentially hazardous foods.
- Temperature of hot food being held at or above $135^{\circ} \mathrm{F}$.
- Hot holding unit is preheated before hot food is placed in unit.
- Food is protected from contamination.


## COLD HOLDING

- Temperature of cold food being held is at or below $41^{\circ} \mathrm{F}$.
- Food is protected from contamination.

REFRIGERATOR, FREEZER, AND MILK COOLER

- Refrigerator and freezer units are clean and neat.
- Temperature is appropriate for piece of equipment.
- Food is stored 6 inches off floor in walk-in cooling equipment.
- Thermometers are available and accurate.
- Proper chilling procedures are used.
- All food is properly wrapped, labeled, and dated.
- The FIFO (First In, First Out) method of inventory is practiced.
- A temperature form is maintained to document storage temperatures daily.

FOOD STORAGE AND DRY STORAGE

- Temperature of dry storage area is between $50^{\circ} \mathrm{F}$ and $70^{\circ} \mathrm{F}$ or state public health department requirement.
- All food and paper supplies are stored six to eight inches off the floor.
- All food is labeled with name and delivery date.
- Food is stored in original container or a food grade container.
- Open bags of food are stored in containers with tight-fitting lids and labeled with common name.
- The FIFO method of inventory management is used.
- There are no bulging or leaking canned goods.
- Food is protected from contamination.
- All surfaces and floors are clean.
- Labeled chemicals are stored away from food and food-related supplies.
- There is a regular cleaning schedule.


## CLEANING AND SANITIZING

- Three-compartment sink is properly set up for washing.
- Dishmachine is working properly (such as gauges and chemicals are at recommended levels).
- Suds are visible in wash sink.
- Water is clean and free of grease and food particles.
- Water temperatures are correct for wash and rinse.
- If heat sanitizing, the utensils are allowed to remain immersed in $171^{\circ} \mathrm{F}$ water for 30 seconds.
- If using a chemical sanitizer, it is mixed correctly and a sanitizer test strip is used to test chemical concentration.
- Smallware and utensils are allowed to air dry.
- Wiping cloths are stored in sanitizing solution while in use.


## UTENSILS AND EQUIPMENT

- All small equipment and utensils, including cutting boards, are cleaned and sanitized between uses.
- Small equipment and utensils are washed, sanitized, and air-dried.
- Work surfaces and utensils are clean.
- Work surfaces are cleaned and sanitized between uses.
- Thermometers are cleaned and sanitized after each use.
- Thermometers are calibrated on a routine basis.
- Can opener is clean.
- Drawers and racks are clean.
- Clean utensils are handled in a manner to prevent contamination of areas that will be in direct contact with food or a person's mouth.


## LARGE EQUIPMENT

- Food slicer is clean.
- Food slicer is cleaned and sanitized after each use.
- Boxes, containers, and recyclables are removed from site.
- Loading dock and area around dumpsters are clean and odor-free.
- Exhaust hood and filters are clean.


## GARBAGE STORAGE AND DISPOSAL

- Kitchen garbage cans are clean and covered.
- Garbage cans are emptied as necessary.
- Boxes and containers are removed from site.
- Loading dock and area around dumpster are clean.
- Dumpster is closed.

PEST CONTROL

- Outside doors have screens, are well sealed, and are equipped with a self-closing device.
- No evidence of pests is present.
- There is a regular schedule of pest control by a licensed pest control operator.



## USDA FOODS

Fruits, vegetables, whole grains, and healthy sources of protein are available to help schools create meals that are consistent with the new meal requirements. For example, the USDA Foods program offers reduced-sodium canned beans and vegetables at no more than 140 mg per half-cup serving, which is in line with the requirement to reduce sodium in school meals. A variety of frozen fruits and vegetables without added sugar or salt are also available. The program also offers reduced-sodium and reduced-fat processed and blended cheeses (including Cheddar and mozzarella), fajita strips, and beef products.

Schools can convert their USDA Foods into ready-to-use end products. Establishing the Nutrient Standards for processed end products, and sharing their standards with processors, is the responsibility of the SFA that orders the end product.
A. If SFAs have any questions about USDA Foods (i.e., perpetual inventory, transferring foods, lost USDA Foods, disposal of spoiled USDA Foods), they should contact the Department of Human Services (DHS) at 405-521-3581 and/or the following Web site: www.okdhs.org.
B. USDA Foods are allocated based on the total number of lunches served in the previous year. USDA Foods are forecast a year in advance; if there is an increase or decrease in the number of lunches served, this will be reflected in the next year's allocation.
C. The maintenance of a refrigerator and/or freezer daily temperature log is required by the Food Distribution Unit of DHS for SFAs receiving USDA Foods. In the event that a refrigerator or freezer containing USDA Foods should malfunction and the contents be lost, USDA has deemed that the SFA must assume financial responsibility for the lost items unless a daily temperature log maintenance record can be produced. The daily temperature log maintenance record could possibly save the SFA from being placed in the unfortunate situation of having a claim filed by USDA for the value of USDA Foods lost. Refer to page CM-95 for an example of the log.
D. A USDA Foods Product Comment Form developed by USDA is to provide local SFAs with a standardized method in which to document undesirable and/or inferior USDA Foods received by their SFAs. Refer to page CM-97 for a sample Comment form.
E. A written system of accountability must be developed for the USDA Foods received by the SFA. USDA refers to this as a perpetual inventory. This is the complete and accurate record of the receipt, distribution, use, disposal, and inventory of USDA Foods. Refer to page CM-99 for a sample Perpetual Inventory form.
F. Sites are to use USDA Foods in the preparation of required food items or side dishes of the reimbursable lunch. In addition, they may be used in the preparation of meals served under any other meal service activity that is operated in the site under the nonprofit CNP account; e.g., SBP, SMP, à la carte sales, and snacks. (Reference All State Directors' Memo 99-SNP-14)

## Examples of ACCEPTABLE use of USDA Foods are:

- Repackaging and selling USDA Foods peanuts in the à la carte sales line.
- Serving USDA Foods beef patties at a school function banquet. The cost must be at least equal to or greater than the value of the USDA Foods contained in the meal. The USDA value of the USDA Foods must accrue to the nonprofit school food service account (SFSA).
- Using USDA Foods in baking items that are sold in the teachers’ lounge as long as they are also sold/served to students.

Examples of $\boldsymbol{U}$ NACCEPTABLE use of USDA Foods are:

- Catering operations for sites not participating in the NSLP.
- Catering for child care centers not participating in the CACFP.
- Using USDA Foods in the preparation of meals served at a school function banquet where the USDA value of the USDA Foods is not returned to the nonprofit SFSA.
- Using donated products in baking items that are given/sold exclusively to faculty, parent organizations, or the public.
- Using USDA Foods in any nonstudent-related events such as catering banquets for civic groups, partisan political functions, or supplying refreshments for parent organizations. Further, SFAs are prohibited from increasing their orders for USDA Foods for the purpose of supporting school-related functions other than NSLP, SBP, etc.
G. Commodity Processing

Commodity processing allows state distributing agencies (DHS) and eligible SFAs to contract with commercial food processors to convert raw bulk USDA Foods into more convenient ready-to-use end products.

USDA Foods processed by USDA do not require the school to follow procurement regulations. However, if a USDA Foods item is being processed by a food vendor, then procurement regulations must be followed.

1. Commodity Processing Operations

USDA offers states an estimate of the dollars planned to support a particular commodity. Multiple forms of a commodity are available as ordering options, one of which is bulk for reprocessing.

For example, funds to support the turkey market may be spent on turkey roasts, turkey ham, whole turkeys, or bulk pack turkeys. The bulk pack is specifically designed for efficient processing into end products such as sliced deli meat, hot dogs. DHS coordinates with school districts the best forms in which to order this commodity to meet school needs.

For raw bulk USDA Foods to be further processed into selected end products, DHS or SFAs contract with commercial food processors to have USDA Foods converted to more usable forms.

This legally binding agreement (or processing agreement) allows the processor to receive USDA Foods like bulk chicken as an ingredient in the production of a finished end product like chicken nuggets or patties. In turn, the value of USDA Foods is passed through to the recipient agency in the form of a lower cost for the finished product. USDA purchases and delivers bulk donated foods to the designated processing location as ordered by DHS.

## 2. The Commodity Value Passed on to SFA

Processors entering into these types of agreements must ensure that the full value of USDA Foods contained in the finished products is returned to the SFA. This value can be returned to the SFA by:
a. Discounting the normal commercial price of a product.
b. Paying a refund to the school.
c. Charging a fee for service for converting the USDA Foods.

End products made from meat or poultry are usually produced under fee-for-service agreements. Under this arrangement, the end products are sold at a processing fee, which represents the processor's costs for labor, packaging, other ingredients, and administrative overhead. With a fee for service, the value of the USDA Foods in the end products is not included in the price of the product.
3. Types of Commodity Processing Agreement

Processing agreements can be between FNS, DHS, and a processor, or an SFA and a processor. There are four basic types of agreement:

- National Processing Agreement (NPA). To reduce costs and paperwork, FNS has taken on the role of holding the agreement with the processor, monitoring the bond and approving all of the end products manufactured under the agreement. For additional information on NPA, go to <www.fns.usda.gov./fdd/ processing/national/>.
- State Master Agreement. Under a state master agreement, DHS enters into an agreement with the processor and designated eligible SFAs may purchase end products from their processor.
- State Agreement. Under a state agreement, DHS negotiates bids and/or prices, selects the processor and the end products that will be produced, and enters into an agreement with the processor.
- Recipient Agency Agreement. Under a recipient agency agreement, the SFA enters into an agreement with the processor. This kind of arrangement requires the approval of DHS. Once approved, the SFA may purchase end products from that processor. A recipient agency agreement should be used after the SFA has completed its procurement process.

4. Procurement of Processing Services

- Under a national agreement, DHS or the SFA is responsible for conducting procurement, depending on who controls the finished product.
- Under a state agreement, DHS is responsible for conducting procurement.
- Under both the state master agreement and the recipient agency agreement, the SFA is responsible for conducting the procurement.

Regardless of the type of agreement that is used, processing services must be procured following federal procurement regulations.

All procurements are subject to the most stringent procurement thresholds whether that is federal, state, or local thresholds.
5. Regulations Governing Commodity Processing

Commodity processing is governed by regulations contained in 7 CFR $\S 250.30$. For a complete copy of 7 CFR §250 regulations, go to the Food Distribution Web site at <www.fns.usda.gov/fdd/regs;fd regulations.htm>.

For more information about commodity processing, we suggest that you contact DHS. A list of these state contacts may be found on the Food Distribution Web site at <www.fns.usda.gov/fdd/contacts/sdacontacts.htm>.

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REFRIGERATOR/FREEZER DAILY TEMPERATURE LOG

| NAME OF SITE |  |  | For: $\qquad$ |  |
| :---: | :---: | :---: | :---: | :---: |
| MONTH: _ Y YEAR: |  |  |  |  |
| Day | Time | Temperature | Corrective Action | Food Worker's Initials |
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Retain completed form with monthly Child Nutrition Programs (CNP) records.

## REFRIGERATOR/FREEZER DAILY TEMPERATURE LOG INSTRUCTIONS

The maintenance of a refrigerator and/or freezer temperature log is required by the Food Distribution Unit of the Department of Human Services (DHS) for any institution receiving commodities. In the event that a refrigerator or freezer containing United States Department of Agriculture (USDA) commodities should malfunction and the contents be lost, USDA has deemed that the institution must assume financial responsibility for the lost items unless a temperature log maintenance record can be produced. The temperature log maintenance record could possibly save the institution from being placed in the unfortunate situation of having a claim filed by USDA for the value of commodities lost. Refrigerators should be maintained at $41^{\circ} \mathrm{F}$ or below; freezers should be maintained at $0^{\circ} \mathrm{F}$ or below.

## INSTRUCTIONS:

- Use one form per freezer and/or refrigerator unit.
- Record name of site, name of refrigerator/freezer unit, and month and year.
- Record a temperature reading of every unit each morning.
- Post the date, time, and temperature of each unit on the designated form for that unit.
- Initial form for the day the temperature of the unit was recorded.

Document temperatures daily during operations. Record the temperatures late each Friday afternoon and early Monday morning if the institution is closed for the weekends. Record the temperature immediately after a known or suspected power loss. During holidays, record the temperature at least every other day, with no more than a two-day gap.

RETURNTO: Department of Human Services Food Distribution Agency P. O. Box 25352

Oklahoma City, Oklahoma 73125
405-521-3581

## COMMODITY PRODUCT <br> COMMENT FORM

| Contract Party: (Name of food service director, SFA's name, address, and telephone number) | Date: |
| :---: | :---: |
| Commodity Item(s): |  |
| Complaint: |  |
| Location: <br> (Site's name, address, and telephone number) | Complaint made by: |
| Commodity Contract Number: (Located on case—must have this number) <br> Commodity Lot Number: (Usually located on case—valuable to have) <br> Other Identifying Information: (Pack date; can code; any other numbers available) |  |
| FORSTATEAGENCY USE ONLY |  |
| Vendor: | Order Number: |
| Shipped From: | Date: |
| Destination Point: | Date: |

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State of Oklahoma
Department of Human Services PERPETUAL INVENTORY FOR USDAFOODS

| Food Item | Location | Description | Best If Used by |
| :--- | :--- | :--- | :--- |


| DATE | QUANTITIES <br> IN | $\begin{gathered} \text { QUANTITIES } \\ \text { OUT } \end{gathered}$ | BALANCE | INITIALS | REMARKS |
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## ADDITIONAL INFORMATION

## A. Food Leaving School Premises/Designated Eating Areas (Reference FNS Instruction 786-8, Revision 1)

The authorizing legislation and program regulations clearly intend that meals (breakfasts, lunches, and snacks) reimbursed under the programs are to be SERVED and CONSUMED as part of the school program on school or school-related premises. Therefore, school meals given to children to take home are not reimbursable. The term PREMISES has been defined as those assigned eating areas for both students and adults. Guests must also eat their meals in the designated areas. No food items-meals, leftover food, or USDA Foods-are to be carried away from the premises by any person. However, meals such as those taken on school-supervised field trips may be reimbursed if they meet meal pattern requirements and are served and consumed as part of a school-related function. These functions must be part of the curriculum, as defined by the State Agency, and not extracurricular events. Meals served off-site should be subject to especially stringent sanitary and precautionary measures to avoid contamination and spoilage. NOTE: USDA requires that all food items necessary for a reimbursable meal must be provided by the SFA. Therefore, any part(s) of a meal that is being provided by a parent, student organization, grandparent, or any other person or entity must not be claimed for reimbursement. (Reference 7 CFR §210.10)
B. Use of Leftover Foods (Reference USDA Policy Memo 89-SNP-7 and 96-SNP-28)

1. There has been a strict interpretation of regulations dealing with the use of foods produced and USDA Foods used in the school food service program.

At the same time, discarding unusable leftover food when there are needy people in the community and there are charitable nonprofit organizations in the community that can use the food to address that need is wasteful and violates humanitarian sensibilities.
2. A new policy will now allow the state the flexibility to authorize SFAs to release leftover food to charitable nonprofit organizations under the following conditions:
a. Good meal production planning is followed to ensure that one meal per child is produced.
b. The leftover food cannot be used in the food service program and would otherwise be thrown away.
c. State and local health codes are followed.
d. There is an agreement on file at the SFA between the SFA and the nonprofit organization to include, at a minimum: (a) terms of the agreement; (b) duties of the district; (c) duties of the contractor; (d) nondiscrimination; (e) contractor not an officer, employee, or agent of the district; (f) liability; (g) hold harmless and indemnification; and (h) certification of liability insurance. An example of an agreement is on page CM-109.
e. Documentation must be maintained with food production records. This must include, at a minimum:

- What food items
- Quantities
- Date


## C. Food Garbage

USDA has very strict regulations about the distribution of food garbage for the use of feeding animals. The Oklahoma Department of Agriculture should be contacted for further information.
D. Sanitation/Health Inspections of Kitchens

1. Sanitation

Local, county, and state standards must be followed. It is recommended that a sample of each food served during the day be taken at each meal service and kept under refrigeration for at least 72 hours before discarding. The Oklahoma State Department of Health Food Service Establishment Regulations (Chapter 256) may be obtained through the Consumer Protection Division of Food Sanitation at 405-271-5243. This information may also be accessed at <www.health.state.ok.us>.
2. Health Inspections of Kitchens
a. Section 111 of the Child Nutrition and WIC Reauthorization Act of 2004 (Public Law 108-265) amended Section 9(h) of the Richard B. Russell National School Lunch Act regarding health inspections required in schools participating in the NSLP or SBP.
b. Each school must obtain at least two health inspections each school year. The inspections must be conducted by the Health Department. In addition, schools must post, in a publicly visible location, the most recent health inspection and provide a copy of the health inspection report to a member of the public upon request. If a school is not receiving the required two inspections per year, the school should contact the Health Department to request that the inspections be conducted; the date and name of the person spoken to concerning this matter should be documented.
c. The Reauthorization Act also requires the State Agency to annually submit a report on health inspections to the Secretary of Agriculture. To meet this requirement, state agencies must annually collect and submit to FNS the number of schools within the state that meet the requirement for two health inspections; the number of schools that have only obtained one inspection; the number of schools that have not been able to obtain any inspections; and the number of schools that exceed the required number of inspections. (Reference USDA Policy Memo 2005-SP-10) This report will be submitted through eClaims by each school district prior to the submission of the September claim for reimbursement.
d. Oklahoma Law Title 63 O.S. Sections 1-106.1(E) and 1-1118, and Title 75 O.S. Section 314(C)(1) requires institutions such as schools to pay annual license renewal fees of $\$ 100$ per site to the Oklahoma State Department of Health. This fee is necessary to support the continued operation of food sanitation programs, including facility inspections conducted by the Health Department.
E. Competitive Food Services (Reference All State Directors’ Memos 1985-SCHOOLS-28)

1. Section 10(a) of the Child Nutrition Act of 1966, as amended by Public Law 95-166 in 1977, directs USDA to issue regulations relating to the service of foods made available in competition with the NSLP and SBP. The federal law does not provide specifics about how competitive foods should be regulated, and there is no specific authority enabling USDA to regulate foods sold outside of the designated food service areas. Designated food service areas include any area where reimbursable meals are prepared, served, and/or consumed.
2. À la carte foods are all other foods offered for individual sale and defined as foods sold at any time during the school day anywhere on the school campus, including the school food service areas.
3. USDA regulations do not prohibit the sale of these foods. These foods range from second servings of foods that are part of the reimbursable school meal to foods that students purchase in addition to or in place of a reimbursable school meal, such as à la carte sales and other foods and beverages purchased from vending machines, school stores, and snack bars.
4. USDA regulation $\S 210.11$ (b) states that the sale of these foods may be allowed in the food service area during the meal period only if all income from the sale of such foods accrues to the benefit of the nonprofit school food service or school or student organizations approved by the school.
E. Foods of Minimal Nutritional Value (FMNV) (Reference All State Directors' Memo 1980-SNP-52)

## 1. Definition

USDA defines foods of minimal nutritional value as those foods which provide $\boldsymbol{L E S S}$ than 5 percent of the United States Recommended Daily Allowance (USRDA) for each of the eight specified nutrients per 100 calories AND less than 5 percent of the USRDA for each of eight specified nutrients per serving. The eight specified nutrients to be evaluated are protein, vitamin A, vitamin C (ascorbic acid), niacin, riboflavin, thiamin, calcium, and iron. In the case of artificially sweetened foods, only the per serving measure would apply.
2. USDA realizes that states and local SFAs may find it difficult to apply the 5 percent rule to each food item sold on school premises. Therefore, USDA has established a more practical method to evaluate FMNV. USDA has identified four categories of food items that are considered to be FMNV. States and SFAs must restrict those foods which are included in the four categories of FMNV. (Reference All State Directors’ Memo 1980-SNP-52)

The four categories of FMNV are soda water/carbonated beverages, water ices, chewing gum, and certain candies. The types of food items belonging to each category are defined as follows:
a. Soda water/carbonated beverages-A class of beverages made by absorbing carbon dioxide in potable water. The amount of carbon dioxide used is not less than that which will be absorbed by the beverage at a pressure of one atmosphere and at a temperature of $60^{\circ} \mathrm{F}$. It either contains no alcohol or only such alcohol, not in excess of 0.5 percent by weight of the finished beverage, as is contributed by the flavoring ingredient used. No product shall be excluded from this definition because it contains artificial sweetener or discrete nutrients added to the food, such as vitamins, minerals, and protein.
b. Water ices-Water ices are the foods prepared from the same ingredients and in the same manner prescribed for sherbets, except that the mix need not be pasteurized and complies with all the provisions as sherbet (including the requirements for label statement of ingredients), except that no milk or milk-derived ingredient, and no egg ingredient other than egg white, is used. Water ices include foods that are artificially or naturally flavored with nonfruit or nonfruit juice flavorings. However, a frozen product with fruit or fruit juice or with milk or milk products is NOT classified as a water ice.

Unless the following types of products have an exemption for a specific product, they are considered FMNV:

Frozen, water-based bars-water ices
Frozen coffee/tea drinks—water ices
Partially frozen drinks-water ices
Frozen pickle juice/brine-water ice
Soda water floats-soda water; while these items contain ice cream which is not an FMNV, the main ingredient is soda water
c. Chewing gum-Flavored products from natural or synthetic gums and other ingredients which form an insoluble mass for chewing.
d. Certain candies-Processed foods made predominantly from sweeteners or artificial sweeteners with a variety of minor ingredients which characterize the following types:

- Hard candies-A product made predominantly from sugar (sucrose) and corn syrup which may be flavored and colored; is characterized by a hard, brittle texture; and includes such items as sour balls, fruit balls, candy sticks, lollipops, starlight mints, after-dinner mints, sugar wafers, rock candy, cinnamon candies, breath mints, jaw breakers, and cough drops.
- Jellies and gums-A mixture of carbohydrates which are combined to form a stable gelatinous system of jellylike character; are generally flavored and colored; and include gumdrops, jelly beans, jellied and fruit-flavored slices.
- Marshmallow candies-An aerated confection composed of sugar, corn syrup, invert sugar, 20 percent water, and gelatin or egg white, to which flavors and colors may be added.
- Fondant-A product consisting of microscopic-sized sugar crystals which are separated by a thin film of sugar and/or invert sugar in solution such as candy corn or soft mints.
- Licorice-A product made predominantly from sugar and corn syrup which is flavored with an extract made from the licorice root.
- Spun candy-A product that is made from sugar that has been boiled at a high temperature and spun at a high speed in a special machine.
- Candy-coated popcorn—Popcorn which is coated with a mixture made predominantly from sugar and corn syrup.


## G Federal USDA Regulations and FMNV

1. In order to further the nutrition goals set forth by statute, current USDA regulations prohibit the sale of these FMNV during student meal services (7 CFR § 210.11[b]). SFAs must ensure that they are complying with the requirements of FMNV in the following areas:
a. Food service area/meal period (Reference All State Directors' Memo 2001-SP-06)
(1) The term food service area refers to any area on-site premises where program meals are either served or eaten. Eating areas that are completely separate from the serving lines are clearly part of the food service area. Furthermore, sites may not design their food service areas in such a way as to encourage or facilitate the choice or purchase of FMNV as a ready substitute for, or in addition to, program meals. Similarly, during meal periods includes both the time of serving and the time the student spends eating the meal.
b. Access to FMNV
(1) It is not permissible for a site to serve FMNV during a meal service period in the area where reimbursable meals are served and/or eaten.
(2) SFAs agree to price the reimbursable meal as a unit. Any FMNV provided with a reimbursable meal at no additional charge is in fact being SOLD as part of the unit if the FMNV is only available when a reimbursable meal is taken. This violates the prohibition against selling FMNV in the food service areas during meal periods. Further, such arrangements violate the unit price provision in the agreement.
c. Use of funds in the nonprofit SFSA

Costs charged to the nonprofit SFSA must be both necessary and reasonable. The costs of FMNV purchased for service in the food service area during meal periods are neither necessary nor reasonable, so they are not allowable costs. In some circumstances, the cost of MINOR quantities of FMNV used to decorate or enhance a food or menu item is allowable. Any other costs of FMNV for service in the food service area during meal periods must be disallowed. If SFSA funds are used to purchase FMNV for sale outside a meal period or outside a food service area during meal periods, such purchases must be selfsustaining. This means that funds must be deposited in the SFSA in an amount sufficient to cover all direct and indirect costs relating to the purchase and service of FMNV with SFSA funds. Records documenting the recovery of these costs must be maintained and available for review.
H. State (Oklahoma) law and FMNV (Effective July 1, 2007)

1. Senate Bill 265, which went into effect on July 1, 2007, was signed into law by Governor Brad Henry on April 14, 2005. The bill introduced a new section of law (70 O.S. Section 5-147) providing that each district board of education shall ensure that:
a. Students in elementary school facilities are not provided FMNV except on special occasions. (Reference 70 O.S. §5-147)
b. Students in middle and junior high school facilities are not provided FMNV except after school, at events which take place in the evening, and on special occasions. An exception to the minimal nutritional value standard will be diet soda with less than ten calories per bottle or can.
c. Students in high schools are provided healthy food options in addition to any FMNV to which they have any access at school. Each district shall provide incentives such as lower prices or other incentives to encourage healthy food choices for high school students.
d. For purpose of this section, foods of minimal nutritional value means any food so defined in 7 CFR 210.11 and listed in Appendix B of the regulations for the NSLP.
e. There may be exceptions to the above-named rules in certain instances. For example, FMNV may be allowed when used as part of an instructional program; when prescribed by a physician or as part of a student's individualized education program (IEP); when part of a lunch brought from home; or when used as an ingredient in a special recipe, such as cupcakes with jellybeans or sweet potatoes with marshmallow topping.
I. Special Medical or Dietary Needs
2. USDA regulations state "Schools shall make substitutions in foods listed in this section for students who are considered disabled under 7 CFR Part 15(b) and whose disability restricts their diet. Schools MAY also make substitutions for nondisabled students who are unable to consume the regular breakfast, lunch, or milk provided under the Special Milk Program (SMP) because of medical or other special dietary needs. Substitutions shall be made on a case-by-case basis only when supported by a statement of the need for substitutions that includes recommended alternate foods, unless otherwise exempted by USDA Food and Nutrition Service (FNS). Such statement shall, in the case of a disabled student, be signed by a physician or, in the case of a nondisabled student, by a recognized medical authority." (Refer to pages CM-111 and CM-113 for medical forms.)

## 2. SFA Responsibilities:

- Required to make substitutions or accommodations for students with disabilities if meals or milk under SMP is normally available to the general student population and a Section 504 Plan is on file for the student (the Rehabilitation Act of 1973).
- Must provide additional meal services or food items not normally available for disabled students when required in an IEP (Individuals With Disabilities Education Act [IDEA]).
- Must base substitutions or modifications for disabled students on a prescription written by a licensed physician.
- Must base substitutions or modifications for nondisabled children on a medical statement by a medical authority.
- Must not revise or change a diet prescription or medical order.
- May provide food or beverage substitutions or accommodations for nondisabled children with special dietary needs as supported by a statement signed by a recognized medical authority
- Documentation of special dietary needs must be on file at the cafeteria manager's office.


## J. Food Allergy

1. Generally, children with food allergies or intolerances do not have a disability as defined under either Section 504 of the Rehabilitation Act or Part B of IDEA, and the school food service MAY, but is not required to, make food substitutions for them.
2. However, when in the licensed physician's assessment, food allergies may result in severe, life-threatening (anaphylactic) reactions, the child's condition would meet the definition of DISABILITY and the substitutions prescribed by the licensed physician must be made. It is the responsibility of the SFA to pay for any substitutions required. (For more information on allergy and anaphylaxis label reading, go to <www.foodallergy.org>.)
K. Milk Substitutions (Nondairy Beverage)
3. Public Law 108-265, Section 102 states that a school $\boldsymbol{M A Y}$ substitute for the fluid milk requirement a nondairy beverage that is nutritionally equivalent to fluid milk and meets nutritional standards established by USDA for students who cannot consume fluid milk because of a medical or other special dietary need other than a disability.
4. Substitutions MAY be made if the school notifies the State Agency in its Renewal Policy Statement that the school is implementing this variation. The substitution is required to have a written statement from a medical authority or from a student's parent or legal guardian (refer to page CM-115 to see an example of the Milk Substitution Request Form) that identifies the medical or other special dietary need that restricts the student's diet. The school shall not be required to provide beverages other than beverages the school has identified as acceptable substitutes.
5. Expenses incurred in providing substitutions that are in excess of expenses covered by reimbursement shall be paid by the SFA.

NOTE: Only meals that contain milk or an acceptable milk substitute are reimbursable unless the school is implementing the Offer versus Serve provision and the student declines the milk.
a. REMINDER: Acceptable fluid milk to serve includes pasteurized:

- Unflavored or flavored fat-free milk
- Unflavored lowfat milk
- Lactose-reduced milk
- Lactose-free milk
- Cultured buttermilk
b. Fluid milk substitution rule applies to the following CNP:
- National School Lunch Program (NSLP)
- School Breakfast Program (SBP)
- After-School Snack Program (ASSP)
- Special Milk Program (SMP)
c. Nondairy beverage nutrient requirements per cup:
- Calcium 276 mg
- Protein 8 g
- Vitamin A 500 IU
- VitaminD 100 IU
- Magnesium 24mg
d. Acceptable reasons for requesting a milk substitute:
- Milk allergy
- Religious
- Cultural
- Ethical reason
- Vegan diet

NOTE: If a request states that a child does not like milk, this is not an acceptable reason.
e. Unacceptable milk substitutions:

- Water
- Juice

NOTE: When the milk substitution request is due to a medical or special dietary need other than a disability, the school chooses whether to accommodate the student and selects the nondairy beverage in accordance with the final milk substitution rule.
L. Substitutions Due to Ethnic or Religious Preferences

Sites MAY consider ethnic and religious preferences when planning and preparing meals. Variations on an experimental or continuing basis in the food components for the food-based menu-planning approaches must have written approval from USDA. Contact the State Agency for further instructions. (Reference USDA Regulations §210.10[g][2])

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# EXAMPLE <br> USE OF LEFTOVER FOODS 

## AGREEMENT

THIS AGREEMENT is made and entered into this $\qquad$ day of $\qquad$
$\qquad$ , between $\qquad$ , hereinafter referred to as the Contractor, and , hereinafter referred to as the District.

WHEREAS the Contractor is a nonprofit agency qualified to distribute food to needy persons in the community,
The parties hereby agree as follows:

1. TERM

This Agreement is effective upon execution and shall remain in effect until terminated by the parties hereto. Either party may terminate this Agreement by providing the other party five days advance written notification, delivered to its last known address.
2. DUTIES OF THE DISTRICT

The District shall make available to the Contractor at no cost and on a nonexclusive basis leftover food items from the District's food service operation, for which the District has determined it has no further use.
3. DUTIES OF THE CONTRACTOR

The Contractor shall pick up the food items at times and places mutually agreeable to the parties as specified in paragraph 9, transport them as necessary, and provide them at no cost to needy persons, all in a manner that complies with applicable laws and regulations.
4. NONDISCRIMINATION

Neither party shall employ discriminatory practices in its performance hereunder on the basis of race, color, religion, national origin, ancestry, sex, age, or disability.
5. CONTRACTOR NOTAN OFFICER, EMPLOYEE, ORAGENT OF THE DISTRICT

While engaged in performance of this contract, the Contractor is an independent contractor and is not an officer, employee, or agent of the District.
6. LIABILITY

The District shall not be liable to the Contractor for personal injury or property damage sustained by the Contractor in the performance of this contract, whether caused by the District, its officers, employees, or by third persons.

## 7. HOLD HARMLESSAND INDEMNIFICATION

The Contractor agrees to release, discharge, indemnify, defend, and hold harmless the District, its employees, and agents for all illness, injury, or damage to persons or property which may arise out of the activities covered under this Agreement, including the transportation, distribution, use, or consumption of food items, irrespective of any negligence on the part of the District.

Furthermore, the Contractor agrees to defend and fully indemnify the District from any and all liability, loss, or damage the District or its agents or employees may suffer as a result of claims, demands, costs, penalties, litigation, or judgments against it arising from any and all illness, injury, or damage to any person, persons, or property caused by or resulting from the activities covered under this Agreement, including the transportation, distribution, use, or consumption of food item.
8. INSURANCE

The Contractor shall carry sufficient general liability insurance to protect itself, its employees, and agents against all such claims (referenced in paragraph 7, above) arising under this Agreement, and to indemnify and defend the District.

Contractor shall provide the District with certificate(s) of insurance acceptable to the District's Contract Supervisor, specifying that the District is to be given written notice 30 days in advance of any modification to or termination of coverage.

The Contractor's insurance carrier is: $\qquad$
Policy Number: $\qquad$ .
9. DELIVERY

Contractor shall take delivery at the following location(s):

## CONTRACTOR

DISTRICT

BY $\qquad$
$\qquad$
Title
BY $\qquad$
Tit
Contract Supervisor

## MEDICAL STATEMENT

## FOR

CHILDREN WITHOUT DISABILITIES

## Requesting Special Foods in Child Nutrition Programs

Part I (to be filled out by SFA or Parent/Guardian)
Name of Student: $\qquad$ Age: $\qquad$

Name of Parent/Guardian: $\qquad$ Telephone Number: $\qquad$
School District: $\qquad$ School Attended by Student: $\qquad$
Part II (to be filled out by a recognized Medical Authority)
Diagnosis (include description of the patient's medical or other special dietary needs that restrict the child's diet):
$\qquad$
$\qquad$
$\qquad$
List food(s) to be omitted from diet:
$\qquad$
$\qquad$
$\qquad$

List food(s) that may be substituted (diet plan):
$\qquad$
$\qquad$
$\qquad$
Additional information:
$\qquad$
$\qquad$
$\qquad$

## Date

Signature of Recognized Medical Authority
Telephone Number: $\qquad$

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# MEDICAL STATEMENT <br> <br> FOR <br> <br> FOR <br> CHILDREN WITH DISABILITIES Requesting Special Foods in Child Nutrition Programs 

Part I (to be filled out by the School District or the Parent/Guardian)
Name of Student: $\qquad$ Age: $\qquad$
Name of Parent/Guardian: $\qquad$ Telephone Number: $\qquad$
School District: $\qquad$ School Attended by Student: $\qquad$
Part II (to be filled out by a Physician)
Diagnosis (include description of the patient's disability and the major life activity affected by the disability):
$\qquad$
$\qquad$
$\qquad$
List food(s) to be omitted from diet:
$\qquad$
$\qquad$
$\qquad$

List food(s) that may be substituted (diet plan) and any modifications of texture or consistency that are necessary:
$\qquad$
$\qquad$
$\qquad$
$\qquad$

Date
Signature of Physician
Physician'sTelephone Number: $\qquad$

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## MILK SUBSTITUTION REQUEST

Student's Name: $\qquad$ Age: $\qquad$ Grade: $\qquad$

The $\qquad$ Public School is participating in the milk substitution provision which states that a school may substitute for the fluid milk a nondairy beverage that is nutritionally equivalent to fluid milk and meets Nutritional Standards established by the United States Department of Agriculture (USDA). At a minimum, the Nutritional Standards shall include fortification of calcium, protein, vitamin A, and vitamin D to levels founds in cow's milk for students who cannot consume fluid milk because of a medical or other special dietary need other than a disability.

The $\qquad$ Public School has notified the State Department of Education (the State Agency) that the school is implementing this variation. The substitution requires a written statement by a medical authority or by a student's parent or legal guardian that identifies the medical or other special dietary need which restricts the student's diet, except that the school shall not be required to provide beverages other than beverages the school has identified as acceptable substitutes.

Acceptable substitutes are as follows:

Expenses incurred in providing substitutions that are in excess of expenses covered by reimbursements shall be paid by the school district.

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How to Read a Label for a Milk-Free Diet
All FDA-regulated manufactured food products that contain milk as an ingredient are required by U.S. law to list the word "milk" on the product label.

Avoid foods that contain milk or any of these ingredients:
butter, butter fat, butter oil, butter
acid, butter ester(s)
buttermilk
casein
casein hydrolysate
caseinates (in all forms)
cheese
cottage cheese
cream
curds
custard
diacetyl
ghee
half-and-half
lactalbumin, lactalbumin phosphate
lactoferrin
lactose

## lactulose

milk (in all forms, including condensed, derivative, dry, evaporated, goat's milk and milk from other animals, lowfat, malted, milkfat, nonfat, powder, protein, skimmed, solids, whole)
milk protein hydrolysate
pudding
Recaldent ${ }^{\circledR}$
rennet casein
sour cream, sour cream solids
tagatose
whey (in all forms)
whey protein hydrolysate
yogurt

The Food Allergy \& Anaphylaxis Network
11781 Lee Jackson Hwy. Suite 160
Fairfax, VA 22033-3309
Phone: 703-691-3179
Fax: 703-691-2713
www.foodallergy.org faan@foodallergy.org

| Milk is sometimes found in the following: |  |
| :--- | :--- |
| artificial butter flavor | luncheon meat, hot dogs, sausages |
| baked goods | margarine |
| caramel candies | nisin |
| chocolate | nondairy products |
| lactic acid starter culture and other nougat <br> bacterial cultures  |  |

## How to Read a Label for a Soy-Free Diet

All FDA-regulated manufactured food products that contain soy as an ingredient are required by U.S. law to list the word "soy" on the product label.

## Avoid foods that contain soy or any of these ingredients:

edamame
miso
natto
shoyu
soy (soy albumin, soy cheese,
soy fiber, soy flour, soy
grits, soy ice cream, soy
milk, soy nuts, soy sprouts,
soy yogurt)
soya
soybean (curd, granules)
soy protein (concentrate,
hydrolyzed, isolate)
soy sauce
tamari
tempeh
textured vegetable protein
(TVP)
tofu
Milk is sometimes found in the following:
Asian cuisine
vegetable gum
vegetable starch

## Keep the following in mind:

- The FDA exempts highly refined soybean oil from being labeled as an allergen. Studies show most allergic individuals can safely eat soy oil that has been highly refined (NOT cold pressed, expeller pressed, or extruded soybean oil).
- Most individuals allergic to soy can safely eat soy lecithin.
- Follow your doctor's advice regarding these ingredients.


## How to Read a Label for a Peanut-Free Diet

All FDA-regulated manufactured food products that contain peanut as an ingredient are required by U.S. law to list the word "peanut" on the product label.

Avoid foods that contain peanuts or any of these ingredients:
artificial nuts
beer nuts
cold pressed, expeller pressed, or
extruded peanut oil
goobers
ground nuts
mixed nuts


Peanuts are sometimes found in the following:
African, Asian (especially Chinese,
Indian, Indonesian, Thai, and
Vietnamese), and Mexican dishes
baked goods (e.g., pastries, cookies) candy (including chocolate candy) chili
enchilada sauce
marzipan
mole sauce nougat
monkey nuts
nut pieces
nutmeat
peanut butter
peanut flour
peanut protein hydrolysate
egg rolls

号

## Keep the following in mind:

- Mandelonas are peanuts soaked in almond flavoring.
- The FDA exempts highly
refined peanut oil from being
labeled as an allergen. Studies
show that most allergic
individuals can safely eat peanut oil that has been highly refined (NOT cold pressed, expeller pressed, or extruded peanut oil).
Follow your doctor's advice.
- A study showed that, unlike other legumes, there is a strong possibility of cross-reaction between peanuts and lupine.
- Arachis oil is peanut oil.
- Many experts advise patients allergic to peanuts to avoid tree nuts as well.
- Sunflower seeds are often produced on equipment shared with peanuts.


## How to Read a Label for a Wheat-Free Diet

All FDA-regulated manufactured food products that contain wheat as an ingredient are required by U.S. law to list the word "wheat" on the product label. The law defines any species in the genus Triticum as wheat.

Avoid foods that contain wheat or any of these ingredients:
bread crumbs
bulgur
cereal extract
club wheat
couscous
cracker meal
durum
einkorn
emmer
farina
flour (all-purpose, bread, cake, durum, enriched, graham, high-gluten, highprotein, instant, pastry, self-rising,
soft wheat, steel ground, stone ground whole-wheat)
hydrolyzed wheat protein
Kamut
matzoh, matzoh meal (also spelled as matzo, matzah, or matza)
pasta
seitan
semolina
spelt
sprouted wheat
triticale
vital wheat gluten
wheat (bran, durum, germ, gluten,
grass, malt, sprouts, starch)
wheat grass
whole-wheat berries

## Wheat is sometimes found in the following:

soy sauce
surimi
starch (gelatinized starch, modified
starch, modified food starch,
vegetable starch)

## How to Read a Label for an Egg-Free Diet

All FDA-regulated manufactured food products that contain egg as an ingredient are required by U.S. law to list the word "egg" on the product label.

Avoid foods that contain egg or any of these ingredients:
albumin (also spelled albumen)
egg (dried, powdered, solids, white, yolk)
eggnog
globulin
lysozyme
baked goods
baked goods
lecithin
macaroni
mayonnaise
meringue (meringue powder)
ovalbumin
ovovitellin
surimi

## How to Read a Label for a Shellfish-Free Diet

All FDA-regulated manufactured food products that contain a crustacean shellfish as an ingredient are required by U.S. law to list the specific crustacean shellfish on the product label.

## Avoid foods that contain shellfish or any of these ingredients:

crab
crawfish (crayfish, ecrevisse)
lobster (languouste, langoustine, scampo, coral, tomalley)
prawn
shrimp (crevette)
Mollusks are not considered major allergens under foodlabeling laws and may not be fully disclosed on a product label.

Your doctor may advise you to avoid mollusks or these ingredients:
abalone
clams (cherrystone, littleneck, pismo, quahog)
cockle (periwinkle, sea urchin)
mussels
octopus
oysters
snails (escargot)
squid (calamari)
Shellfish are sometimes found in the following:
bouillabaisse
cuttlefish ink
fish stock
seafood flavoring (e.g., crab or clam extract)
surimi
Keep the following in mind:

- Any food served in a seafood restaurant may contain shellfish protein due to crosscotnact.
- For some individuals, a reaction may occur from inhaling cooking vapors or from handling fish or shellfish.

|  How to Read a Label for <br> All FDA-regulated manufactured food products that contain a tree  |  |  |  |  |
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M. Inventory Records

1. Because SFAs are required to account for all revenues and expenditures and the definition of cost of food used is the dollar value of beginning inventory plus the dollar value of food received during the period less the value of ending inventory, inventory is required by USDA of purchased foods. (Reference USDA Policy Memo 1984-SNP-31) An Inventory Record is available on the SDE Web site <www.sde.ok.gov> to record the monthly physical inventory. After logging on, highlight Services and Federal Programs. Click on Child Nutrition; click on Documents; and scroll down the page to School Meal Program-Various Documents/Forms. The publication reflects only the physical inventory for one year. Each SFA may print the appropriate number of Inventory Records needed for each eating site. (Refer to pages CM-121 and CM-123 for forms.)
2. An inventory system is a tool of management that must be maintained for an efficient food service operation. This inventory book provides food service managers with a systematic method for taking and maintaining a complete inventory record of purchased food and supplies.

An incorrect inventory can mean the difference between profit or loss and will also reflect an incorrect food cost.

Inventory records are used to:

- Develop meaningful food cost analysis (arrive at food and milk used).
- Prepare monthly orders for food and supplies.
- Avoid being overstocked or understocked.
- Assure that quantity of food needed to meet menu requirements is available.
- Prevent food deterioration by using older stocks first.
- Control any possible disappearance of foods.
- File insurance claims in case of fire or theft.
- Determine food and milk used for financial reports.

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## INVENTORY RECORD

| Item | Month | Date |  | Month Date |  |  | Month Date |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Amount on Hand | Unit Price can/lb doz/unit \$ | TOTAL VALUE \$ | Amount on Hand | Unit Price can/lb doz/unit \$ | TOTAL <br> VALUE <br> \$ | Amount on Hand | Unit Price can/lb doz/unit \$ | TOTAL VALUE \$ |
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## INSTRUCTIONS

1. Refer to the Index of Purchased Foods for grouping of items. The format used groups items by food categories. For example, instead of having all frozen foods in a separate section, all fruits are in one section and are separated into canned, frozen, and dehydrated/dried. This arrangement is easy to use when preparing purchase orders.
2. The inventory form has only three columns to fill in. The Amount on Hand should be number of single units-such as 21 cans applesauce (not 3 cases +3 cans), 30 pounds frozen strawberries (not 1 can), 48 pounds flavored gelatin (not 2 boxes). The price is the Unit Price—such as $\$ 1.85 / \# 10$ can, $\$ .40 / \mathrm{lb}$, or $\$ 1.50 / \mathrm{qt} / \mathrm{jar}$. Items such as eggs would be priced per dozen, mustard might be per gallon, vanilla per quart, but the majority of items will be priced per \#10 can or per pound. The Total Value Column is figured by multiplying the Amount on Hand by the Unit Price.
3. In the storeroom, the commodity items should be separated from the purchased foods and inventoried separately using the perpetual inventory format provided by the Department of Human Services (DHS).
4. Any substantial amount of food in the refrigerators should be inventoried at the per portion cost.
5. For speed, accuracy, and efficiency, items on the storeroom shelf should be arranged in the same order as the inventory form.
6. When space and facilities permit, nonfood supplies should be in a separate storeroom. When this is not possible, they should be grouped together in alphabetical order in one area of the storeroom.
7. Use hard-lead pencil only (\#3); soft-lead pencils (\#2 or \#2 1/2) will smear.
8. When the monthly inventory has been totaled, transfer the totals to the Monthly Record of Inventory Value.

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MONTHLY RECORD OF INVENTORY VALUE

YEAR: $\qquad$

| MONTH | TOTAL VALUE OF <br> PURCHASED FOODS | TOTAL VALUE OF SUPPLIES |
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## RESOURCE PAGE

| Food-Buying Guide | http://teamnutrition.usda.gov/Resources/foodbuy/ngguide.html |
| :--- | :--- |
| Food-Buying Guide Calculator | http://fbg.nfsmi.org/ |
| My Plate | http://teamnutrition.usda.gov/myplate.html.html \# <br> www.choosemyplate.gov |
| USDA Recipes | http://www.fns.usda.gov/tn/Resources/usda.recipes.html |
| Oklahoma Child Nutrition Documents | http://ok.gov/sde.childnutrition-documents |
| Food Allergy Network | http://www.foodallergy.org/ |
| Meal Patterns | http://www.nfsmi.org/mealpattern |
| Meal Pattern Training Module | http://healthymeals.nal.usda.gov/mealpattern |
| Final Rule and Q\&A on New Guidelines | http://www.fns.usda.gov/cnd/Governance/Legislation/ <br> nutritionstandards.htm |
| USDA—Food and Nutrition Services | http://www.fns.usda.gov/fns/ |
| Menu Planning | http://healthymeals.nal.usda.gov/menu-planning |
| Best Practices | http://healthymeals.nal.usda.gov/bestpractices |
| USDA Foods (Commodities) | http://www.fns.usda.gov.fdd |
| Vegetable Subgroups | http://www.choosemyplate.gov/food-groups |
| Timeline of Implementation | http://www.fns.usda.gov/cnd/governance/legislation/ <br> nutritionstandards.htm |

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$\qquad$
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[^0]:    ${ }^{1}$ These foods are whole-grain or enriched or made with enriched or whole-grain meal and/or flour, bran, and/or germ. Some of the foods, or their accompaniments, may contain more sugar, salt, and/or fat than others. This should be a consideration when deciding how often to serve them.
    ${ }^{2}$ Snack only.
    ${ }^{3}$ Snack and breakfast only.

[^1]:    ${ }^{5}$ Refer to program regulations for the appropriate serving size for supplements served to children aged 1 through 5 in the NSLP and meals served to children aged one through five and adult participants in the Child and Adult Care Food Program (CACFP). Breakfast cereals are traditionally served as a breakfast menu item, but may be served in meals other than breakfast.
    ${ }^{6}$ Cereals must be whole grain or whole grain and enriched or fortified cereal.

[^2]:    * CNP requires 14.75 grams of whole-grain or enriched flour or meal, bran or germ, or an equivalent amount of cereal as provided in FNS Instruction 783-1, Rev. 2, to equal 1 serving Grains/Breads. Grains/Breads may be credited in $1 / 4$-serving increments.
    ${ }^{* *}$ CNP requires a minimum of $1 / 8$ cup fruit/vegetable to equal 1 serving fruit/vegetable.
    Oklahoma State Department of Education Cafeteria Managers’ Training, July 2012

[^3]:    * CNP requires 14.75 grams of whole-grain or enriched flour or meal, bran or germ, or an equivalent amount of cereal as provided in FNS Instruction 783-1, Rev. 2, to equal 1 serving Grains/Breads. Grains/Breads may be credited in $1 / 4$-serving increments.
    ${ }^{* *}$ CNP requires a minimum of $1 / 8$ cup fruit/vegetable to equal 1 serving fruit/vegetable.
    Oklahoma State Department of Education Cafeteria Managers’ Training, July 2012

[^4]:    ${ }^{*}$ Meal Contribution—Meat/Meat Alternate (Mt); Fruit (F); Vegetable—Dark Green (DGV), Red/Orange (ROV), Beans/Peas (Legumes) (LV), Starchy (SV), Other (OV); Grains/Breads (GB); Whole Grains (WG); Milk (Mk); Extra Foods/Condiments (X)
    ${ }^{* *}$ The planned serving size must be the same as the portion size served.

[^5]:    Meal Contribution: Fruit (F); Vegetable—Dark Green (DGV), Red/Orange (ROV), Beans/Peas (Legumes) (LV), Starchy (SV), Other (OV), Extra Foods/Condiments (X)

