Child Nutrition Onboarding

What You Need to Know About Your New Position

Region 5 ESC

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Purpose of This Packet

Welcome to your role as Child Nutrition Director for the National School Lunch Program (NSLP) and School Breakfast Program (SBP). This onboarding packet is designed to give you a structured overview of your responsibilities, compliance requirements, and operational priorities for a K–12 program. It includes a month-by-month timeline, compliance checklist, operational guidance, and best practices for a successful year.

Program Overview

As Child Nutrition Director, you are responsible for:

- Compliance with NSLP/SBP federal regulations and state agency requirements
- Financial management of the nonprofit school food service account
- Menu planning and meal pattern compliance
- Procurement and inventory controls
- Staffing and training
- Civil rights compliance
- Verification and eligibility processes
- On-site monitoring and internal controls
- Reporting and claims for reimbursement
- Food safety and HACCP implementation
- Coordination with administration and campuses

First 30 Days — Immediate Priorities

- Review current year application and agreement with state agency (update as needed)
- Confirm access to all required systems (state portal, claiming system, ordering systems)
    - TxUNPS/TANS (Form FND 135)
    - WBSCM
    - FFavors
    - Goldstar
    - Labatt
    - MIlk
    - Produce
    - POS system
    - K12 and Processor Link
- Review meal counting and claiming procedures at each campus (Review Attachment B)
- Meet with cafeteria managers and key staff. Set -up expectations for your department.
- Schedule meeting with Principals to discuss expectations.
- Update or create a department handbook.
- Review menus and meal pattern compliance.
- Review procurement plan and vendor contracts.
- Verify free/reduced application process and direct certification process.
- Review food safety plans and health inspections. Ensure each kitchen has a HACCP book.
- Confirm staff training records.
- Review wellness policy and Smart Snacks compliance.
- Find out dates of SHAC meetings, board meetings, and other administrative meetings
- Check inventory and ordering cycles.
- Review general processes of the district.
    - Purchasing
    - Maintenance
    - Payroll
    - Hiring process
    - Sick Leave/Personal Leave
    - Employee Handbook

Core Compliance Areas

Meal Pattern Compliance

- Age/grade group requirements
- Daily and weekly minimums
- Vegetable subgroups
- Whole grain-rich requirements
- Milk requirements
- Offer vs Serve (if implemented)

Eligibility & Benefit Issuance

- Direct certification matching
- Application processing timelines
- Benefit issuance lists
- Edit checks
- Community Eligibility Provision (CEP)

Civil Rights

- Annual staff training
- Public notification system
- Complaint procedures
- Nondiscrimination statement on materials

Procurement

- Follow micro, small, and formal purchase thresholds
- Written procurement procedures
- Buy American compliance
- Contract management and documentation

Financial Management

- Nonprofit food service account only used for allowable costs
- Revenue vs expenditures tracking
- Paid lunch equity (if applicable)
- Adult meal pricing

Required Annual Tasks

- Civil Rights Training — All staff
- Staff Training
- On-Site Monitoring — All campuses
- Verification — If selected or required
- Free & Reduced Application Processing
- Wellness Policy Update/Review
- Administrative Review preparation (if scheduled year)
- Procurement Training (anyone dealing with procurement)
- Food Allergies Training (New - More information coming soon!)

Required Training Hours (July 1-June 30)

- Director - 12 hours (8 hours of food safety training within 30 days of start date)
- Kitchen Manager - 10 hours
- Staff - 6 hours, if working 20 hours or more. 4 hours, if work less than 20 hours
- Sub - 4 hours

Any employee hired after January must complete half of the required hours for the role/position.

Texas Food Managers Certification - Every 5 years. Required for the Director and Kitchen Manager. It is recommended to have a second person in the kitchen have their Food Manager's Certification also.

Texas Food Handler's Certification - Every 2 years. Required for everyone in the kitchen to prep and serve food.

Website Requirements

Ensure the website is updated throughout the school year

- LWP and Triennial assessment
- Charge Policy (also put this in the student handbooks for each campus)
- Menus
- Non-Discrimination Statement
- Media notification
- Student and Staff Pricing

Monthly School Year Timeline

July

- Review LWP and triennial assessment (https://www.squaremeals.org/Programs/National-School-Lunch-Program/Local-Wellness-Policy-Requirements)
- Review media notification and ensure that it was sent out. (All districts including those on CEP) https://www.squaremeals.org/Programs/National-School-Lunch-Program/Eligibility-and-Verification/Household-Applications
    - Send to local Media
    - Send to unemployment office
- Review Civil Rights Complaint procedure.
- Review Charge Policy.
- Update vendor contracts and procurement documentation.
- Learn delivery dates.
- Review Smart Snacks (https://foodplanner.healthiergeneration.org/calculator/)
- Review ala carte pricing.
- Finalize menus and production templates.
- Update free/reduced applications and letters (https://www.squaremeals.org/Programs/National-School-Lunch-Program/Eligibility-and-Verification/Household-Applications)
- Conduct staff training (food safety or other areas + civil rights) https://www.squaremeals.org/FandN-Resources/Training/Civil-Rights
- Prepare POS and counting systems.
- Complete direct certification matching and send out DC letters.
- Ensure that negative balances are paid off.
- Complete Free/Reduced letters and applications and send them to households (not required for CEP).
- Confirm all opening orders have been placed.
- Analyze staffing needs. Get a staff list/schedules. Hire new staff if needed.
- USDA Foods Reconciliation
- Complete PLE tool (https://www.squaremeals.org/Programs/National-School-Lunch-Program/Administration-Forms/u9211q/323032362D32303237205061696420 4C756E636820457175697479)
- Complete adult meal pricing (https://www.squaremeals.org/Programs/National-School-Lunch-Program/Administration-Forms/u9211q/4164756C74204D65616C2043616C63756C61746F72)
- Run DC list - mid July

August

- School starts — monitor meal service closely
- Ensure meal pattern compliance
- Run DC list on August 5th or after
- Get homeless, foster, and migrant list and enter them as DC
- Verify signage and civil rights postings (Justice For All)
- Begin application processing
- Monitor staffing and participation
- Schedule Fall Semester, Health Inspection
- Complete Attachment B
    - Procedures for ISS
    - Procedures for DAEP
    - Procedures for Field Trips
    - Procedures for other students not eating in the cafeteria or coming through the breakfast/lunchline.

September

- File monthly claims
- Continue application processing
- Run DC list - September 5 or after
- Get homeless, foster, and migrant list and enter them as DC
- Conduct first on-site reviews of counting & claiming (All campuses - lunch, 50% - Breakfast) https://www.squaremeals.org/Programs/National-School-Lunch-Program/Administration-Forms/u9211q/6F6E73697465206D6F6E69746F72696E67
- Review edit checks and claim accuracy
- Monitor production records daily
- Begin verification planning if required

October

- File monthly claims
- Verification process begins (if required) https://www.squaremeals.org/Programs/National-School-Lunch-Program/Eligibility-and-Verification/Application-Verification
- Run DC list - October 5 or after
- Get homeless, foster, and migrant list and enter them as DC
- Submit verification report by deadline
- Conduct internal audits of meal counts
- Review procurement logs
- Check inventory controls

November

- File monthly claims
- Follow up on verification activities
- Review financial reports and food cost percentages
- Run DC list - November 5 or after
- Get homeless, foster, and migrant list and enter them as DC
- Conduct staff refresher training
- Review Smart Snacks compliance

December

- File monthly claims
- Mid-year compliance review
- Check training documentation
- Run DC list - December 5 or after
- Get homeless, foster, and migrant list and enter them as DC
- Review equipment needs and maintenance
- Budget check and forecast
- Summer Mandate in TXUNPS

January

- File monthly claims
- Schedule Spring Health Inspection
- Begin planning next year procurement
- Run DC list on January 5th or after
- Get homeless, foster, and migrant list and enter them as DC
- Start creating menus for the next school year
- Review menus and product specifications
- Update forecasting and participation trends
- USDA Food ordering begins
- Conduct on-site monitoring if not yet completed
- Start financial report (https://www.squaremeals.org/Programs/National-School-Lunch-Program/Compliance/Financial-Report)

February

- File monthly claims
- Review staffing needs for next year
- Run DC list on February 5th or after
- Get homeless, foster, and migrant list and enter them as DC
- Start working on the Financial Report (work with Business Manager)
- Review vendor performance
- Conduct internal procurement audit
- Prepare for possible Administrative Review

March

- File monthly claims
- Finalize procurement planning
- Run DC list on March 5th or after
- Get homeless, foster, and migrant list and enter them as DC
- Complete CEP report
- Review financial status of nonprofit food service account
- Plan summer feeding if applicable
- Update training plans
- Complete and submit financial report

April

- File monthly claims
- Run DC list on April 5th or later
- Get homeless, foster, and migrant list and enter them as DC
- Review wellness policy goals
- Equipment replacement planning
- Conduct second round of site reviews if needed

May

- Year-end financial review
- File monthly claims
- Run DC list on May 5th
- Get PK list
- Get homeless, foster, and migrant list and enter them as DC
- Inventory and asset review
- Staff evaluations
- Training plan for next year
- Closeout documentation planning
- SNP Packet Renewal

June

- Year-end claims and reports
- Run DC list on June 5th or later
- Get homeless, foster, and migrant list and enter them as DC
- Inventory counts
- Financial reconciliation
- Archive records
- Plan summer maintenance and deep cleaning

Record Retention Requirements

Maintain all program records for **current year plus three additional years**, including:

- Claims
- Menus and production records
- Procurement documentation
- Training records
- Eligibility documentation
- Verification records
- Financial records

Best Practices for Success

- Build strong relationships with campus administrators
- Visit cafeterias regularly
- Audit your own program monthly
- Document everything
- Train staff often
- Use checklists
- Prepare year-round for Administrative Review
- Ask your Region 5 contacts when unsure

Quick Reference

- **PLE Tool** - squaremeals/programs/nslp/administration-forms - Search 2026-2027 PLE tool.
- **Adult Meal Calculator** - squaremeals/programs/nslp/administration-forms - Search Adult Meal Calculator
- **On-Site Review** - squaremeals/programs/nslp/administration-forms - Search On Site Monitoring
- **Financial Report** - squaremeals/programs/NSLP/compliance/financial report
- **Local Wellness Policy** - squaremeals/programs/nslp/local wellness policy
- **Media Notification** - squaremeals/programs/nslp/eligibility and verification/household applications
- **Free and Reduced Applications and Letters** - squaremeals/programs/nslp/eligibility and verification/household applications
- **Verification** - squaremeals.org/Programs/nslp/Eligibility and Verification/Application Verification

Updates for SY 2026-2027

Final Rule for School Meal Standards

On April 25, 2024, USDA's Food and Nutrition Service (FNS) published the final rule titled, Child Nutrition Programs: Meal Patterns Consistent With the 2020-2025 Dietary Guidelines for Americans, which is the next step in continuing the science-based improvement of school meals and other USDA Child Nutrition Programs (CNP), as well as advancing USDA's commitment to nutrition security.

While this rulemaking is effective July 1, 2024, USDA is gradually phasing in required changes over time. Beginning SY 2025-2026, menus must align with the first phase of limits on added sugar in cereal, yogurt, and milk.

- **Breakfast Cereal**: ≤6g of added sugars per dry ounce
- **Yogurt**: ≤12g of added sugars per 6 ounces
- **Flavored Milk**: ≤10g of added sugars per 8 fluid ounces

Visit **USDA** for more information on the final rule and a full description of all provision

Transitional Standards for Milk, Whole Grains, and Sodium Final Rule

This rule establishes standards for milk, whole grains, and sodium for school years 2022-2023 and 2023-2024 to give schools time to transition in the short term. Meanwhile, USDA is working to develop long-term nutrition standards - based on the newest DGA and extensive input from a wide range of partners - that will work for schools, families, and industry alike.

Through school year 2026-27 (until June 30, 2027), schools will maintain current sodium limits (Sodium Target 1A for lunch and Sodium Target 1 for breakfast).

Sodium Limits in Effect Through SY 2026-2027 Breakfast

Grade Group	Target
K-5	≤ 540 mg
K-8	≤ 540 mg
6-8	≤ 600 mg
9-12	≤ 640 mg
K-12	≤ 540 mg

Sodium Limits in Effect Through SY 2026-2027 Lunch

Grade Group	Target
K-5	≤ 1110mg
K-8	≤ 1110mg
6-8	≤ 1225mg
9-12	≤ 1280mg

Updates for SY 2026-2027

Expanding Fluid Milk Options in Child Nutrition Programs

On May 8, 2026, USDA published the Final Rule: Expanding Fluid Milk Options in Child Nutrition Programs, which will codify in regulation specific milk flexibilities that were first announced in the Whole Milk for Healthy Kids Act of 2025. The Act allowed for the service of whole and reduced-fat (2%) milk to children ages 2 and up who receive school lunches through the National School Lunch Program (NSLP).

Beginning June 8, the Final Rule will expand this option to allow service of whole and reduced-fat milk to participants ages 2 and up in the School Breakfast Program (SBP), Child and Adult Care Food Program (CACFP), and Special Milk Program, in addition to NSLP and its sub-programs (including the Afterschool Snack Program (ASCP) and the Seamless Summer Option (SSO).

Additionally, whole and reduced-fat milk can be sold as a Smart Snack in schools.

Note that milk served to children ages 2 to 5 must still be unflavored, while milk served to participants ages 6 and up can be flavored (Note that an unflavored option must be made available for meals served in NSLP and SBP).

NSLP and SBP operators may exclude the saturated fat from fluid milk when calculating the weekly average saturated fat requirement at lunch and breakfast. Note that saturated fat in fluid milk substitutions or milk used in recipes cannot be excluded from the weekly saturated fat calculation.

When offering fluid milk substitutions to all students at breakfast and/or lunch, school districts are no longer required to notify TDA when a child requests a fluid milk substitute, though notification requirements remain in effect if the substitutes are not available to all students.

Finally, the Milk Act introduced a requirement that schools accept a parent's attestation of a child's disability in lieu of a doctor's or registered dietitian's signature when requesting a milk substitute that is not nutritionally equivalent to milk. This requirement was not expanded on in the Final Rule. Therefore, it only applies to milk served at school lunches and cannot be implemented for any other meal service in any other Program.

For more information, refer to **USDA Expanding Fluid Milk Options in Child Nutrition Programs.**

SY 2026-2027 Meal Pattern Chart
National School Breakfast Program

Minimum Amount of Each Food Component Per Week (Minimum Offering Per Day)

Pre-Kindergarten (Pre-K) Daily		
Meal Pattern Components	**Age 1-2**	**Age 3-5**
Milk, Unflavored: Age 1, Whole Age 2-5, low-fat or fat-free	½ Cup	¾ Cup
Fruits and Vegetables	¼ Cup	½ Cup
[1,2]**Grains**: Whole Grain-Rich or Enriched		
Bread Product: (e.g., biscuit, roll, muffin)	0.5 oz eq	
Cooked: Cereal, Cereal Grain, Pasta	0.5 oz eq	
[3]Ready-to-Eat Breakfast Cereal, Dry or Cold:		
Flakes or Rounds	½ Cup	
Puffed Cereal	¾ Cup	
Granola	⅛ Cup	

School Age Daily and Weekly				
Meal Pattern Components	**Grades K–5**	**Grades 6–8**	**Grades 9–12**	**Grades K–12**
[4]**Milk** Unflavored/flavored[5] 1% low fat or fat free	5 (1) cups	5 (1) cups	5 (1) cups	5 (1) cups
Fruits and [6]**Vegetables**	5 (1) cups	5 (1) cups	5 (1) cups	5 (1) cups
[7]**Grains**+ 80 % WG-Rich	7 – 10 (1 oz eq)	8 – 10 (1 oz eq)	9 – 10 (1 oz eq)	9 – 10 (1 oz eq)
Nutrient Specifications: Daily Amount Based on Average 5- Day Week				
Min.–Max. Calories (kcal)	350–500	400–550	450–600	450–500
Saturated Fat % of total calories	< 10	< 10	< 10	< 10
Sodium Target (mg)	≤ 540	≤ 600	≤ 640	≤ 540
Trans Fat	Product nutrition label/manufacturer specification must indicate 0 grams of trans fat per serving.			

[1]CACFP: grain-based desserts are not creditable toward the grains component
[2]CACFP: one whole-grain rich food item must be served each day across all meals
[3]CACFP: Beginning October 1, 2025, breakfast cereals may have no more than 6 grams of added sugar per dry ounce.
[4]One choice of milk must be unflavored at each meal service.
[5]Beginning July 1, 2025, flavored milk must contain no more than 10 grams of added sugars per 8 fluid ounces, or for flavored milk sold à la carte in middle and high schools, 15 grams of added sugars per 12 fluid ounces.
[6]Beginning July 1, 2025, vegetables from at least two different vegetable subgroups must be offered when substituting vegetables for fruits at breakfast on two or more days per school week.
[7]At least 80% of weekly grains offered must be whole grain rich.
+ A Meat/Meat Alternate may be offered as a substitute for grain.

For detailed guidance on regulatory requirements see TDA's Administrative Reference Manual Sections 7, 8, and 9.

SY 2026-2027 Meal Pattern Chart
National School Lunch Program

Minimum Amount of Each Food Component Per Week (Minimum Offering Per Day)

Pre-Kindergarten (Pre-K) Daily		
Meal Pattern Components	**Age 1–2**	**Age 3–5**
Milk: Unflavored Age 1, whole milk Age 2-5, 1 percent low fat or fat free unflavored	½ cup	¾ cup
Fruits	½ cup	¼ cup
Vegetables	½ cup	¼ cup
[1,2] **Grains:** Whole Grain-Rich or Enriched		
Bread product {e.g., biscuit, roll, or muffin)	0.5 oz eq	0.5 oz eq
Pasta	0.5 oz eq	
Meat/Meat Alternates		
Lean meat, poultry, or fish	1 oz	1.5 oz
Tofu, soy product, or alternate protein products	1.0 oz	1.5 oz
Cheese	1 oz	1.5 oz
Large egg	½ egg	¾ egg
Bean, peas, and lentils	0.5 oz eq	0.75 oz eq
Peanut butter, soy nut butter, or other nut or seed butter	2 Tbsp	3 Tbsp
[3] Yogurt, plain or flavored, unsweetened or sweetened	4 oz	6 oz
Peanuts, soy nuts, tree nuts, or seeds	0.5 oz	0.75 oz

School Age Daily and Weekly				
Meal Pattern Components	**Grades K–5**	**Grades 6–8**	**Grades K–8**	**Grades 9–12**
[4] **Milk** Fluid milk: approved unflavored or flavored options[5, 6]	5 (1) cups	5 (1) cups	5 (1) cups	5 (1) cups
Fruits	2½ (½) cups	2½ (½) cups	2½ (½) cups	5 (1) cups
Vegetables	3¾ (¾) cups	3¾ (¾) cups	3¾ (¾) cups	5 (1) cups
Dark Greens	½ cup	½ cup	½ cup	½ cup
Red/Orange	¾ cup	¾ cup	¾ cup	1¼ cups
Beans, Peas, and Lentils	½ cup	½ cup	½ cup	½ cup
Starchy	½ cup	½ cup	½ cup	½ cup
Other	½ cup	½ cup	½ cup	¾ cup
Additional Vegetable	1 cup	1 cup	1 cup	1½ cups
[7] **Grains** 80 % Whole Grain-Rich	8 – 9 (1 oz eq)	8 – 10 (1 oz eq)	8 – 9 (1 oz eq)	10 – 12 (2 oz eq)
Meat/Meat Alternates	8 – 10 (1 oz eq)	9 – 10 (1 oz eq)	9 – 10 (1 oz eq)	10 – 12 (2 oz eq)
Nutrient Specifications: Daily Amount Based on Average 5-Day Week				
Min.-Max. Calories{kcal)	550–650	600–700	600–650	750–850
Saturated Fat % of total calories	< 10	< 10	< 10	< 10
Sodium Target {mg)	≤ 1,110	≤ 1,225	≤ 1,110	≤ 1,280
Trans Fat	Product nutrition label/manufacturer specification must indicate 0 grams of trans fat per serving.			

[1]CACFP: grain-based desserts are not creditable toward the grains component

[2]CACFP: one whole-grain rich food item must be served each day across all meals

[3]CACFP: Beginning October 1, 2025, yogurt may have no more than 12 grams of added sugars per 6 ounces.

[4]One choice of milk must be unflavored at each meal service

[5]Beginning July 1, 2025, flavored milk must contain no more than 10 grams of added sugars per 8 fluid ounces, or for flavored milk sold à la carte in middle and high schools, 15 grams of added sugars per 12 fluid ounces.

[6] Fat-free (skim), low-fat (1%), reduced-fat (2%), or whole milk; lactose-free fluid milk; nondairy beverages meeting FDA nutritional standards. The Whole Milk for Healthy Kids Act of 2025 allows reduced-fat (2%) and whole milk to be served for reimbursable lunches claimed under NSLP.

[7]At least 80% of weekly grains offered must be whole grain rich with the remaining enriched

For detailed guidance on regulatory requirements see TDA's Administrative Reference Manual Sections 7, 8, and 9.

Smart Snacks Nutrition Standards

Any food sold in schools must:

- Be a "whole grain-rich" grain products; or
- Have as the first ingredient a fruit, vegetable, dairy products, or a protein food; or
- Be a combination food that contains at least ¼ cup of fruit and/or vegetable

Foods must also meet several nutrient requirements:

- Calorie limits:
  - Snack Items: ≤ 200 calories
  - Entrée items: ≤ 350 calories
- Sodium limits:
  - Snack Items: ≤ 200 mg*
  - Entrée Items: ≤ 480 mg
- Fat limits:
  - Total Fat: ≤ 35% of calories
  - Saturated fat: < 10% of calories
  - Trans fat: zero grams
- Sugar limit:
  - ≤ 35% of weight from total sugars in foods

Accompaniments

- Accompaniments such as cream cheese, salad dressing and butter must be included in the nutrient profile as part of the food item sold.

Exemptions

- Fresh, canned or frozen fruits with no added ingredients
- Fresh and canned vegetables with no added ingredients
- NSLP/SBP Entrée items when sold on day of service or day after
- Sugar-Free Chewing Gum

Definitions

- **School Campus**: all areas of the property under the jurisdiction of the school that are accessible to students during the school day
- **School Day**: the period from the midnight before, to 30 minutes after the end of the official school day

Nutrition Standards for Beverages

All schools may sell:

- Plain water (with or without carbonation)
- Unflavored or flavored, whole, reduced-fat, low-fat, or fat-free milk
- 100% fruit or vegetable juice and
- 100% fruit or vegetable juice diluted with water (with or without carbonation), and no added sweeteners.

Elementary schools may sell up to 8-ounce portions, while middle schools and high schools may sell up to 12-ounce portions of milk and juice. There is no portion size limit for plain water.

- Caffeinated beverages are only permitted at the High School level.
- Flavored milk sold a la carte in Middle and High Schools must contain ≤15g of added sugar per 12 fluid ounces

Beyond this, the standards allow additional "no calorie" and "lower calorie" beverage options for high school students.

No more than 20-ounce portions of

- Calorie-free, flavored water (with or without carbonation); and

No more than 12-ounce portions of

- Beverages with ≤ 40 calories per 8 fluid ounces, or ≤ 60 calories per 12 fluid ounces.

Competitive Food and Beverage Sales

Fundraisers / Vending Machines

- The sale of food items that meet Smart Snacks requirements are not limited in any way under the standards.
- The standards do not apply during non-school hours, on weekends and at off-campus fundraising events.

Exempt Fundraiser Days

- Texas allows up to 6 fundraisers per campus, per year.
- Exempted fundraisers may not be sold in competition with school meals in the food service area, during meal service.

Alternative standards must be included in the Local Wellness Policy but must not be less restrictive than the federal standards

Offer vs Serve
Breakfast Tips

Under OVS at Breakfast, schools must offer at least four food items from the three required food components (fruit[+], grains[++], and fluid milk).

Required Components at Breakfast

Fruit
1 cup

Grains
1 ounce equivalent (oz eq)

Fluid Milk*
1 cup

Sample OVS Breakfast Menu

- Variety of Milk (1 Cup Milk)
- Slice of Whole Grain-Rich Toast (1 oz eq Grain)
- Whole Grain-Rich Cereal (1oz eq Grain)
- Orange Slices (1 Cup Fruit)

Is it Reimbursable?

For a breakfast to be reimbursable, at least four food items must be offered. Students must select three food items including ½ cup of fruit and/or vegetable for the meal to be reimbursable under OVS.

Use this simple checklist to determine if breakfasts are reimbursable under OVS:

- ☑ Does the meal offered consist of at least four food items?
- ☑ Does the meal offered include the minimum required amounts of fruits, grains, and milk*?
- ☑ Does the meal selected by the student contain at least three food items, including at least ½ cup fruit and/or vegetable?



If the answer to each of these questions is yes, the breakfast meal is reimbursable under OVS.

*Water does not count as one of the three required food components and cannot be served as a substitute for milk.

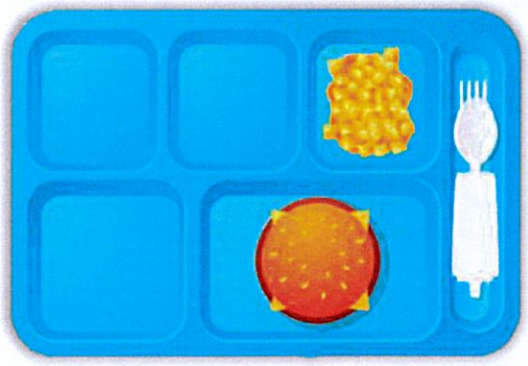
[+] Vegetables may be offered as a substitute for fruits.
[++] A Meat/Meat Alternate may be offered as a substitute for grain.

Offer vs Serve
Lunch Tips

Under OVS at Lunch, schools must offer all five food components in at least the minimum required quantities. Students must select at least three of the five required food components, including at least ½ cup of fruit and/or vegetable, to have a reimbursable lunch.

Required Food Components

Required Food Component	Daily Minimum Requirements for Each Grade Level			
	K-5	6-8	K-8	9-12
Vegetables	¾ cup	¾ cup	¾ cup	1 cup
Fruits	½ cup	½ cup	½ cup	1 cup
Grains	1 oz eq	1 oz eq	1 oz eq	2 oz eq
Meats/Meat Alternates	1 oz eq	1 oz eq	1 oz eq	2 oz eq
Fluid Milk*	1 cup	1 cup	1 cup	1 cup



Sample OVS Lunch Tray

- Hamburger on a Whole Grain-Rich Bun (2 oz eq Grain, 2 oz eq Meat/Meat Alternate)
- Corn (1/2 Cup Starchy Vegetable)

Is it Reimbursable?

Use this simple checklist to determine if student lunches are reimbursable under OVS:

☑ Does the meal offered to students include the minimum required amounts of vegetables, fruits, grains, meats/meat alternates, and fluid milk?

☑ Does the meal selected by the student contain at least three components, including at least ½ cup fruit and/or vegetable?

If the answer to each of these questions is yes, then the school lunch is reimbursable under OVS.

*Water does not count as one of the three required food components and cannot be served as a substitute for milk.

Texas Department of Agriculture
Daily Food Production Record - Onsite Kitchen

1. Contracting Entity (CE) Name or Vendor: _____

2. Site Name: _____

3. Meal Service: ☐ Breakfast ☐ Lunch ☐ Snack ☐ Supper

3a. Service type: ☐ OVS ☐ Serve Only

4. Number of Meals Served

4a. Reimbursable Student Meals: _____

4b. Non-Reimbursable Meals: _____

4c. Total Meals: _____

5. Date of Service: _____

Abbreviations used: Meat (M/MA), Grain (G), Vegetable (V), Fruit (F), Milk (M)

	Planning Section-Complete Before Meal Service														Documentation Section-Complete After Meal Service				
6. Food / Menu Item (including condiments)	7. Meal Component Contribution					8. Recipe # or Product Brand and Code	9.Age/Grade _____		10.Age/Grade _____		11.Adults and A la Carte		12. Total Projected Servings		13. Total Amount Prepared (Offered)	14. Actual # of Servings Selected (Served)	15.Actual # of Servings Selected (Served)	16. Leftovers	17. Comments (as applicable)
	M/ MA (oz. eq.)	G (oz. eq.)	V	F	M		9a. # of Portions Planned	9b. Portion Size	10a. # of Portions Planned	10b. Portion Size	11a. # of Portions Planned	11b. Portion Size	12a. Total # of Planned Servings	12b. Planned Portion Size	Purchased Units (Cases, Lbs, Quarts, Gallons, # 10 Cans, or Pans)	Student	Adult/ A la Carte		

18. Signature - Site Representative: _____

VEGETABLE SUBGROUPS

The National School Lunch Program meal patterns for grades K-12 require weekly servings of 5 vegetable subgroups. The chart below identifies items in each subgroup. Raw leafy greens credit as half the volume served, and tomato paste/puree credits based on volume if reconstituted. Vegetable juice must be pasteurized 100% full-strength juice that cannot exceed half the weekly vegetables served. Check the USDA's Food Buying Guide for crediting information.

DARK GREEN
fresh, frozen, canned

- Boston Bibb lettuce
- Broccoli
- Cilantro
- Collard greens
- Dark green leafy lettuce
- Kale
- Mustard greens
- Romaine lettuce
- Spinach

RED/ORANGE
fresh, frozen, canned

- Butternut squash
- Carrots
- Cherry tomatoes
- Orange bell peppers
- Pumpkin
- Red bell peppers
- Salsa
- Spaghetti sauce
- Sweet potatoes
- Tomatoes
- Tomato sauce

LEGUMES
Dry (cooked), frozen, canned

- Black (turtle) beans
- Edamame
- Garbanzo beans (chickpeas)
- Great Northern beans
- Kidney beans
- Lentils
- Lima beans
- Navy beans
- Pinto beans
- Red beans
- Refried beans
- Soybeans (mature, dry)

STARCHY
fresh, frozen, canned

- Black-eyed peas
- Corn
- Green peas
- Hominy
- Jicama
- Lima beans (green, not dry)
- Plantains
- Potatoes (white, russet, red)
- Succotash (corn and lima beans)

OTHER
fresh, frozen, canned

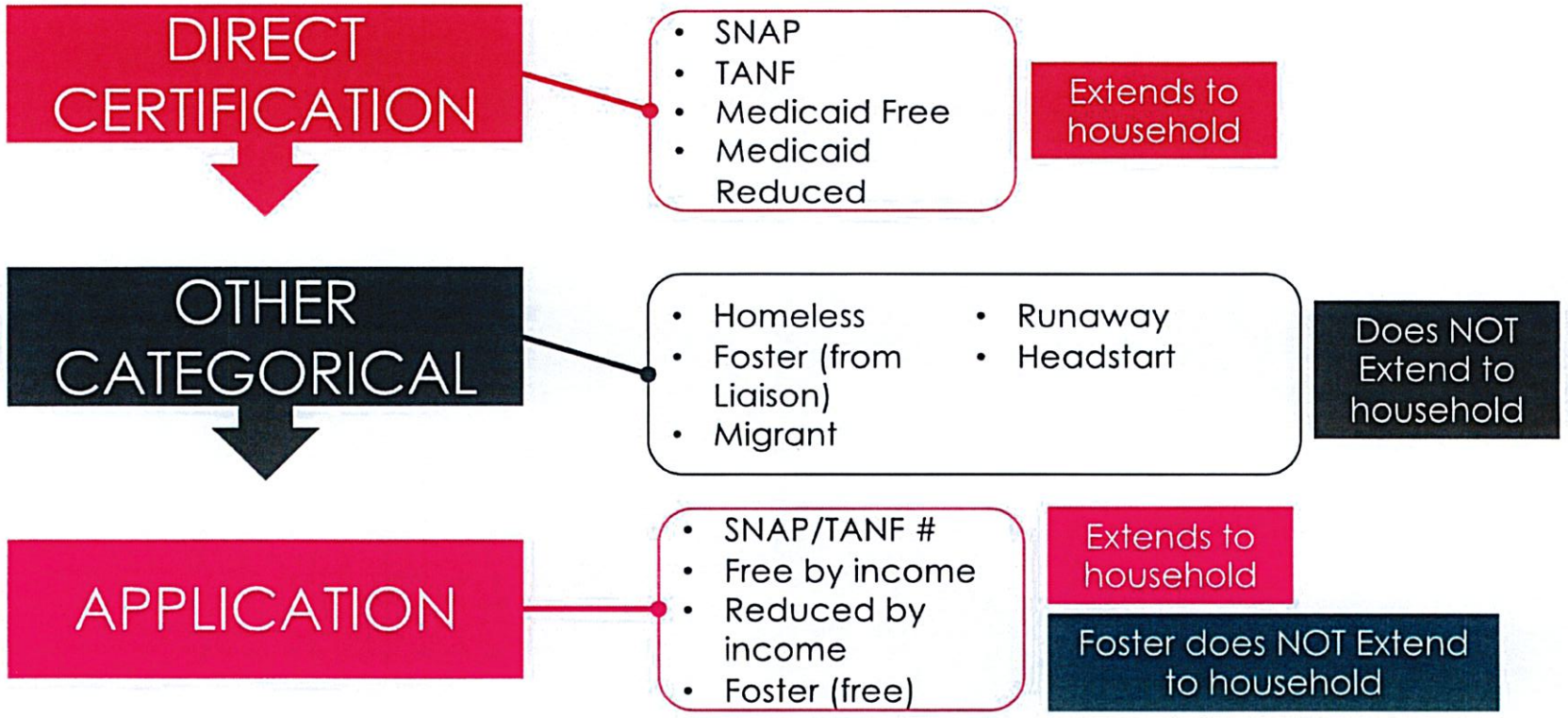
- Anaheim peppers (green chilies)
- Asparagus
- Avocado
- Bean sprouts (cooked only)
- Beets
- Brussels sprouts
- Cabbage
- Cactus (nopalitos)
- Cauliflower
- Celery
- Chayote (mirliton)
- Cucumbers
- Eggplant
- Green/yellow beans
- Green bell peppers
- Iceberg lettuce
- Jalapeno peppers
- Mixed greens lettuce
- Mixed vegetables
- Mushrooms
- Okra
- Olives
- Onions
- Pepperoncini
- Pickles
- Radishes
- Salad mix (with carrots, red cabbage)
- Sauerkraut
- Snap/snow peas
- Spaghetti squash
- Tomatillos
- Yellow bell peppers
- Yellow peppers
- Yellow squash
- Zucchini

Food and Nutrition Division
National School Lunch Program

TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER
This product was funded by USDA.
This institution is an equal opportunity provider.

Updated 12/2019
www.SquareMeals.org

ELIGIBILITY HIERARCHY



District:
Health Inspections & HACCP Implementation **Site:**
Onsite Observation and Records Review **Date:**

	Yes	No
1. Has this site received the first of two required health inspections this school year: If yes, when? If no, has the Health Department been contacted? When?		
2. Has this site received the second of two required health inspections this school year: If yes, when? If no, has the Health Department been contacted? When?		
3. Is the most recent food safety inspection report posted in a visible location for customers to read?		
4. Are the following HACCP forms maintained at this site: Calibration logs		
Receiving logs		
Temperature logs		
Food preparation process charts (posted)		
Standard Operating Procedures		
Manager's Weekly Checklist		
HACCP Training Sign In sheets		
5. Have all food service staff at this site received HACCP on-going training this school year?		
6. Are all monitoring logs up to date? If no, which logs were not current?		
7. Have corrective actions been recorded? Ask employees what they record if the product temperature out of the oven does not meet CCPs and what actions they take.		
8. Are food service staff able to answer the following questions: • What does HACCP stand for?		
• What are SOPs? And where are they located?		
• What are the 3 basic HACCP food process flows? (No Cook, Same Day, Complex)		
9. Did you observe the use of SOPs during the visit?		
10. Are food service staff using standardized recipes with HACCP controls?		
11. If preparing/serving at alternate locations, are there SOPs written for handling, transporting and disposing of food?		
12. Did you observe food service staff using thermometers correctly?		
13. Are thermometers calibrated and action recorded on the calibration log?		
Comments/Corrective Action/Target Date:		

Purchasing Thresholds

Micro Purchases
[Informal]

*as of 10/1/2025

Micro → $15,000 or less

Reasonable Cost

Equitable Distribution of Purchases

Equitable Distribution of Purchases
- Purchases must be distributed among qualified suppliers providing products or services at a reasonable cost.
- SFAs in rural areas with limited ability to distribute purchases equitably due to cost and time of travel must document reasons when it is not feasible to distribute purchases among suppliers

Micro-Purchase Threshold
Purchases over $15,000 should be procured via small or formal procurement method. Purchases should not be intentionally broken up to be within micro threshold.

Example: An SFA purchases 3 steam tables costing $7,000 each but broken out and invoiced as three separate transactions. This scenario exceeds the micro-purchase threshold.

Common Findings

Not Equitably Distributed

Exceeded Micro Purchase Threshold

Small Purchases
[Informal]

*as of 10/1/2025

Small → $15,000.01 - $99,999.99

Obtain a Minimum of 2 Quotes

Specification Documentation

Sole Source Approval
- When a product or service is available only from a single distributor, supplier, or manufacturer, this procurement method is appropriate. A single offer won't always mean it's sole source procurement; other potential offerors may have chosen not to submit an offer.
- An SFA must verify and retain documentation that the product or service can only be procured from a single source.
- SFA must obtain TDA approval if the purchase is greater than $15K.

Vendor Selection:
Clear and accurate specifications of items needing to be procured should be included in documentation justifying the vendor selected.

Common Findings

Obtaining Less Than Two Quotes

Missing Vendor Selection Justification

Sole Source Approval

Formal Purchases

*as of 9/1/2025

Formal → *$100,000 or greater

Open Competition

Invitation for Bid [IFB]

Request for Proposal [RFP]

Small vs. Formal Procurement

Forecasting
For formal procurement, SFAs should move through the forecasting process to ensure a solicitation that includes accurate specifications and technical requirements is developed.

Example: Items that can be forecasted should follow formal procurement procedures ***[not small]*** such as the IFB and RFP processes which fulfill the full and open competition requirement.

Required Co-operative Contract Clauses
SFAs must include clauses that indicate:
- Types of cooperatives SFAs will use
- Types of products and services to be purchased
- Practices to routinely review documentation
- Agreement review methods
- Routine reconciliation of charges

Common Findings

Small vs. Formal

Missing Co-Op Required Clauses

Sole Source Approval

*The threshold requirements listed in this document are not comprehensive. See the Administrator's Reference Manual (ARM) for detailed procurement and threshold requirements, including Micro Purchase Self-Certification.

Contract Management

Contract Terms and Specifications

Routine Review of Contract

District vs. CN Fund Procurement

- District-awarded contracts must meet all child nutrition procurement requirements and specifications.
- Multi-year contracts for FSMCs, vended meals, and consultants are not allowed.
- Catalog vendors are not allowed.

Contract Management Procedures

- SFAs must manage all contracts and agreements it awards or that are procured on its behalf, including ***but not limited to***:
  - Routine review of invoices and statements
  - Verifying products and services invoiced match products and services received

Solicitation Specification Clauses:

- Specifications must include what the SFA is purchasing including purchase requirements that would impact price.

Common Findings

District vs. CN Fund Procurement

Solicitation Missing Clauses

No Contract Management

Procurement Procedures

Written Procedures → Successful Procurement

Procurement procedures are written processes guiding staff through necessary actions for successful procurement. This includes:

- Cost analysis or forecasting methods
- Tools that identify estimated needs for goods and services

Procurement Plan Details

Recommended Action Steps What Can I Do Now?

Track micro-purchases to ensure equitable distribution

Forecast what you will spend in the upcoming year

Update procurement procedures tailored to your organization's needs

Notes

*The information included in this document is not comprehensive. See the Administrator's Reference Manual (ARM) for detailed procurement and threshold requirements, including Micro Purchase Self-Certification

* The increase in the small and formal procurement thresholds is effective as of 9/1/2025.

TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

Micro-Purchase Log

Use this form for purchases with a total cost equal to or less than the federal $15,000 threshold, an internal micro-purchase threshold more restrictive than the federal limit (Enter internal threshold:_____); or a TDA-approved self-certification amount when the micro-purchase option is the method of procurement (Enter approved threshold:_____).

Organization Name: _____ **Organization ID:** _____ **Program Year:** _____

Date of Purchase	Vendor/ Supplier Name, Address	Product(s) and/or Service(s) Purchased *(Quantity + Description)*	Unit Price for Each Item	Total Cost	Reason for Using Micro-Purchase, the Method Used to Determine That the Cost of Each Item Is Reasonable, and Any Other Relevant Information/Justification *(Attach Relevant Documentation)*

Signature of Authorized Representative of the Organization:

I attest that this information is true, accurate, and complete to the best of my knowledge and that all procurements listed complied with federal, state, and local regulations.

Date:

_____ _____

Directions: Micro-Purchase Log

Purpose

This tool is intended to serve as a log for informal micro-purchases—single purchases of less than or equal to the $15,000 federal threshold, an internally imposed micro-purchase threshold of less than $15,000, or a TDA-approved self-certification amount.[1] This type of tool also helps the contracting organization to maintain the documentation required to demonstrate compliance with the micro-purchase regulations.

All micro-purchases must comply with federal, state, and local procurement requirements, including that micro-purchases be distributed among various qualified vendors. See the following for information on compliant procurement and micro-purchases.

- School Nutrition Programs: *Administrator's Reference Manual, Section 17, Procurement.*
- Community Programs: *Complete CACFP Handbook, Section 7000, Financial Management* and *TDA Supplemental SFSP Handbook, Chapter 6, Procurement and Bid Procedures.*

Use This Form	
Frequency	As needed but intended to track a one-year cycle of purchases.
Required Form Format	Not required. Organizations may add columns and fields as necessary to document additional information, such as the impacted school/site/provider.
Record Retention	Public and charter schools are required to keep documentation related to school nutrition programs for five years after the current Program Year. Private schools; independent child, At-risk, or adult care centers; sponsors of day care homes, childcare centers, At-risk sites, or adult day care centers; nonprofit sponsors of summer meals sites; and residential childcare institutions (RCCIs) are required to keep documentation for three years following the current Program Year unless under audit. Refer to the applicable Program Handbook for any exceptions to the retention requirements listed above.

Directions:

Contracting Organization Information

Organization Name: Record the name of the contracting organization in the designated space.

Organization Identification Number (ID): Record the contracting organziation's ID number in the designated space.

Program Year: Record the Program year for the procurement year in the designated space.

Date of Purchase: Record the date of micro-purchase in the designated space.

Vendor/Supplier Name, Address: Record the vendor or supplier name and address in the designated space. Contracting organizations are required to spread micro-purchases among a variety of vendors or suppliers.

Product(s) and/or Service(s) Purchases (Quantity + Description): List the product(s) and/or service(s) included in the total for this purchase in the designated space.

For Example: *5 gallons of 1% white milk*
3 pkg (packages) of 8-count hamburger buns

Unit Price for Each Item: Record the amount of each unit purchased in the designated space.

[1] Note that TDA will not monitor compliance with internally imposed thresholds and will only issue findings if the micro-purchase exceeds the federal threshold or TDA-approved self-certification amount.

Total Cost: Record the amount of total cost for the invoice/receipt in the designated space.

The organization must retain the invoice/receipt for this purchase.

[NOTE: While a canceled check and a debit card bank statement are appropriate secondary support documentation, they do not serve as a business invoice or receipt.]

Reason for Using Micro-Purchase Method, the Method Used to Determine That the Cost of Each Item Is Reasonable, and Any Other Information/Justification:

Record a descriptive statement that explains

1. Why the micro-purchase method is the most suitable procurement method for the purchase

2. The specific method the organization used to ensure that the cost of the product(s) and/or service(s) was reasonable in the designated space. For example:
    a. Prior pricing
    b. Online comparison
    c. Shelf pricing

[NOTE: Organizations must not break larger purchases into small purchases to circumvent the procurement requirements for the small purchase method or formal purchase methods. For example, if an organization requires a certain good or service costing $18,000, it cannot make two single purchases of $9,000 to circumvent using the small purchase method.]

3. The organization can use this field to provide any other information, such as justification or explanation for repeat uses of the same vendor (for example, if the organization is located in a remote area and does not have access to a variety of vendors or suppliers).

Signature of Authorized Representative of the Organization: Ensure that the authorized representative of the contracting organization signs the form as certification that the procurement complied with federal, state, and local regulations.

Date: Record the date the person completing the form signs the completed form in the designated space.

Attach additional documentation as appropriate to this form, as necessary.

Small Purchase Log

(Use this form for purchases with a total cost of less than the simplified purchase threshold that are not micro-purchases.)

CE Name: _____ **CE ID:** _____ **Program Year:** _____

Technical Specifications	**Product(s)/Service(s) to Be Procured:**				
	Description:				
	Quantity:		**Delivery Frequency/Location(s):**		
Vendor/ Supplier Information	**Vendor/Supplier Name & Contact Information:**		**Vendor/Supplier Name & Contact Information:**		**Vendor/Supplier Name & Contact Information:**	
	Contact Date:	**Contact Method:**	**Contact Date:**	**Contact Method:**	**Contact Date:**	**Contact Method:**
	Unit Price:	**Extended Price:**	**Unit Price:**	**Extended Price:**	**Unit Price:**	**Extended Price:**
	Notes:		**Notes:**		**Notes:**	
	☐ **Check If the Vendor/Supplier Is Selected**		☐ **Check If the Vendor/Supplier Is Selected**		☐ **Check If the Vendor/Supplier Is Selected**	

Signature of Authorized Representative of the CE: **Date:**

I attest that this information is true, accurate, and complete to the best of my knowledge.

_____ _____

Directions: Small Purchase Log

Purpose

This tool is intended to serve as a log for informal small purchases and as a tool to help contracting entities (CEs) provide the same technical specifications and bid information to all potential bidders. This tool will also help the CE maintain the documentation required to demonstrate compliance with the small purchase regulations.

All small purchases must comply with federal, state, and local procurement requirements. See the following for information on compliant procurement and small purchases.

- School Nutrition Programs: *Administrator's Reference Manual, Section 17, Procurement.*
- Community Programs: *Complete CACFP Handbook, Section 7000, Financial Management* and *TDA Supplemental SFSP Handbook, Chapter 6, Procurement and Bid Procedures.*

Use This Form	
Frequency	As needed, but intended to track a one-year cycle of purchases.
Required Form Format	Not required.
Record Retention	Public and charter schools are required to keep documentation related to school nutrition programs for five years. Private schools; independent child or adult care centers; sponsors of day care homes, child care centers, or adult day care centers; nonprofit sponsors of summer meals sites; and residential child care institutions (RCCIs) are required to keep documentation for three years.

Directions:

CE Information

Contracting Entity (CE) Name: Record the name of the CE in designated space.

CE Identification Number (CE ID): Record the CE's ID number in the designated space.

Program Year: Record Program year for the procurement in the designated space.

Technical Specifications

Product(s)/Service(s) to Be Procured: Record the name of the product(s) and/or service(s) to be procured in the designated space.

Description: Record a description of the product(s) and/or service(s) to be procured in the designated space.

Include size, weight, package, or other relevant information that will help the supplier or contractor provide an accurate and competitive bid.

Quantity: Record the quantity or amount to be procured in the designated space.

Delivery Frequency & Locations: Record how often the CE expects the product(s) and/or service(s) to be delivered and locations of delivery.

Vendor/Supplier Information

Vendor/Supplier Name & Contact Information: Record vendor or supplier name and contact information in the designated space.

For the contact information, include the following:

- Name of the company or entity
- Name of the person who provided the bid

- Complete address
- Phone number
- Email (optional if email contact is not used)
- Fax (optional if fax contact is not used)

If more than three contractors or suppliers are contacted, use a second form.

Contact Date: Record the date the contact was made in the designated space. If the contacts occurred over several dates, record all dates.

Contact Method: Record the method used for the contact in the designated space. CEs may use a variety of methods to contact potential bidders including, but not limited to, phone, email, and posted notices.

If the contact was made through multiple methods, record all methods. Be sure to record the information, so the date of the contact is associated with the contact method.

Unit Price: Record bid amount for the vendor or supplier in the designated space.

Extended Price: Record the extended price for the product(s) and/or service(s) in the designated space.

Unit Price	x	Quantity	=	Extended Price

Notes: Record information about the capability of the contractor or supplier to provide product(s) and/or service(s), and other information relevant to the award of the contract in the space designated for notes.

Be sure to include <u>why</u> the contract was or was not awarded to each bidder in the notes space.

Check If the Vendor/Supplier Is Selected: Record a check in the box under the information for the vendor or supplier that was selected.

Signature of Authorized Representative of the CE: Ensure that the authorized representative of the CE contacting the vendor/suppliers and completing the form signs the form in the designated space.

Date: Record the date the person completing the form signs the completed form in the designated space.

Attach additional documentation as appropriate to this form.

Wellness Policy Assessment Tool

Form 357 Rev 8/17

This template provides information on wellness policy goals and practices within the SFA. Use this tool to track progress and gather ideas on ways to create a healthier school environment. A separate assessment should be completed for each school, or at a minimum, each school level. The wellness policy and completed assessment must be available to the public.

SFA/District Name

Policy Reviewer

School Name

Date

Select all grades: PK ☐ K ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐

I. Public Involvement

Yes No

○ ○ We encourage the following to participate in the development, implementation, and evaluation of our wellness policy:

☐ Administrators ☐ School Food Service Staff ☐ P.E. Teachers ☐ Parents

☐ School Board Members ☐ School Health Professionals ☐ Students ☐ Public

○ ○ Person in charge of compliance:

Name/Title:

○ ○ The policy is made available to the public.

Indicate How:

○ ○ Our policy goals are measured and the results are communicated to the public.

Please describe:

○ ○ Our district completes triennial reviews of the wellness policy. If more frequently, please describe:

II. Nutrition Education

Yes No

○ ○ Our district's written wellness policy includes measurable goals for nutrition education.

○ ○ We offer standards based nutrition education in a variety of subjects (e.g. science, health, math, etc).

○ ○ We offer nutrition education to students in: ☐ Elementary School ☐ Middle School ☐ High School

III. Nutrition Promotion

Yes No

○ ○ Our district's written wellness policy includes measurable goals for nutrition promotion.

○ ○ We promote healthy eating and nutrition education with signage, use of creative menus, posters, bulletin boards, etc.

○ ○ We have reviewed *Smarter Lunchroom* techniques and evaluated our ability to implement some of them.

○ ○ We place fruits and vegetables where they are easy to access (e.g. near the cafeteria cashier or near the front of the line).

○ ○ We ensure students have access to hand-washing facilities prior to meals.

○ ○ We annually evaluate how to market and promote our school meal program(s).

○ ○ We regularly share school meal nutrition, calorie, and sodium content information with students and families.

○ ○ We offer taste testing or menu planning opportunities to our students.

○ ○ We participate in Farm to School activities and/or have a school garden.

○ ○ We only advertise and promote nutritious foods and beverages on school grounds (e.g. buildings, playing fields, etc).

○ ○ We price nutritious foods and beverages lower than less nutritious foods and beverages.

○ ○ We offer fruits or non-fried vegetables in: ☐ Vending Machines ☐ School Stores ☐ Snack Bars ☐ à La Carte

○ ○ We have nutritional standards for foods/beverages served at school parties, celebrations, events, etc.

○ ○ We provide teachers with samples of alternative reward options other than food or beverages.

○ ○ We prohibit the use of food and beverages as a reward.

IV. Nutrition Guidelines (Cont. from page 1)

Yes	No	
○	○	Our district's written wellness policy addresses nutrition standards for USDA reimbursable meals.
○	○	We operate the School Breakfast Program: ☐ Before School ☐ In the Classroom ☐ Grab & Go
○	○	We follow all nutrition regulations for the National School Lunch Program (NSLP).
○	○	We operate an Afterschool Snack Program.
○	○	We operate the Fresh Fruit and Vegetable Program.
○	○	We have a Certified Food Handler as our Food Service Manager.
○	○	We have adopted and implemented *Smart Snacks* nutrition standards for ALL items sold during school hours, including: ☐ as à La Carte Offerings ☐ in School Stores ☐ in Vending Machines ☐ as Fundraisers

V. Physical Activity

Yes	No	
○	○	Our district's written wellness policy includes measurable goals for physical activity.
○	○	We provide physical education for elementary students on a weekly basis.
○	○	We provide physical education for middle school during a term or semester.
○	○	We require physical education classes for graduation (high schools only).
○	○	We provide recess for elementary students on a daily basis.
○	○	We provide opportunities for physical activity integrated throughout the day.
○	○	We prohibit staff and teachers from keeping kids in from recess for punitive reasons.
○	○	Teachers are allowed to offer physical activity as a reward for students.
○	○	We offer before or after school physical activity: ☐ Competitive sports ☐ Non-competitive sports ☐ Other clubs

VI. Additional Info:

Indicate any additional wellness practices and/or future goals used to establish a school environment that promotes students' health, well-being, and ability to learn. Describe progress made in attaining these goals.

VII. Contact Information:

For more information about this school's wellness policy/practices, or ways to get involved, contact the Wellness Committee Coordinator.

Name		Position/Title	
Email		Phone	

This institution is an equal opportunity provider

Report #1

Entitlement/Bonus Summary Report

he Order Manager and View Only RA Role have access to the Entitlement/Bonus Summary Report. This eport provides a summary or quick snapshot of beginning and remaining entitlement balances, DoD llocation, and bonuses for the school year for which the report is run.

Running Entitlement/Bonus Summary Report

1	On module tabs located in upper-left hand corner, click on "**Reports**"	
2	Click on **"Entitlement Management"**	
3	Click on **"Entitlement/Bonus Summary Report"**	
4	Type NSLP into the **"Program"** field	
5	Type program year in **"Program Year"** field. **Ex: 2023 for SY 2022-2023**	
6	Under the **"Search Criteria"** sub-title click **"Execute"**	
7	To Print to PDF: A. **"Click Print to PDF"** and open file at the bottom of the screen	To Export to Excel: B. Click **"Export"** and open file at the bottom of the screen

Need screenshots or more information?

Use RA106 Reports Part I PPT
or
Part I Handout PDF

Reviewing Report Information in Excel

*Most utilized columns shown below.
Program (i.e NSLP, SFSP)
Program Year
Beginning Entitlement Balance for selected Program Year
DoD Fresh Fruits and Vegetables Entitlement Allocation
Entitlement Order Total: Dollar value of entitlement orders placed through WBSCM (does not include DoD orders)
Entitlement Pounds: Amount of entitlement pounds ordered through WBSCM (does not include DoD orders)
Amount of Entitlement Balance Remaining
Amount of Total Bonus Ordered
Amount of Total Bonus Pounds Ordered

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Program Year
Beginning Entitlement Balance for selected Program Year
DoD Fresh Fruits and Vegetables Entitlement Allocation
Entitlement Order Total: Dollar value of entitlement orders placed through WBSCM (does not include DoD orders)
Entitlement Pounds: Amount of entitlement pounds ordered through WBSCM (does not include DoD orders)
Amount of Entitlement Balance Remaining
Amount of Total Bonus Ordered
Amount of Total Bonus Pounds Ordered

USDA Foods Ordering Schedule

Use this schedule of tasks to place requests for USDA Foods through WBSCM. Weekly tasks can be condensed as desired or as needed depending upon timing of USDA Entitlement release.

Week #1 — Preparation [Catalog Opens]

- ❑ **Ensure all users needing WBSCM access can login**
- ❑ **Prepare all necessary documents:**
  - ❑ Approved Processor List
  - ❑ Forecasting Documents (Commodity Calculator, etc.)
  - ❑ QA WBSCM Requisition Checklist
- ❑ **Check Entitlement Summary Report**
  - ❑ Review entitlement and DoD allocation
  - ❑ DoD allocation: If RA selected "NO" balance will be ZERO.
  - ❑ Contact TDA for downward adjustment of DoD funding

Week #2 — Seasonal Fruits and Vegetables Direct Delivery Requisitions

- ❑ Review and confirm TDA Warehouse
- ❑ Review and confirm Processor Ship-To locations receiving Direct Delivery for further processing
- ❑ **Begin Direct Delivery Seasonal Fruits and Vegetables Requisitions**
  - ❑ Seasonal **(Round 1 Ordering ONLY)**

Week #3 — Direct Delivery Requisitions

- ❑ Review and confirm TDA Warehouse
- ❑ Review and confirm Processor Ship-To locations receiving Direct Delivery for further processing
- ❑ **Begin Direct Delivery Requisitions**
- ❑ **USDA NSLP Foods List (Brown Box)**

***Quality Assurance = QA**
Technical Assistance = TA

Week #4 & #6 — ESC QA/TA Sessions Direct Delivery & Processing

- ❑ Additional time to conduct TA
- ❑ **Utilize WBSCM Requisition Checklist**
  - ❑ All checklist items complete?
- ❑ **Confirm QA Check was Completed**
  - ❑ Choose second staff member
  - ❑ Run QA for each request
- ❑ Move Requisitions from **"Draft Status"** to submit as **"Ready for Approval"**
- ❑ **Contact ESC for Additional TA**

Week #5 — Processing Diversion Requisitions

- ❑ Reference Forecasted Quantities from Commodity Calculator
- ❑ Reference list of Processors with Awarded Bids
- ❑ Review and confirm Processor Ship-To locations for further processing
- ❑ **Begin Processing Diversion Requisitions**

- ❑ RA's should re-enter canceled requisitions into WBSCM before March 1st
- ❑ Anything that is canceled means it was entered incorrectly, and will return entitlement to the RA.

Need additional help? Contact your ESC

TEXAS DEPARTMENT OF AGRICULTURE
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