

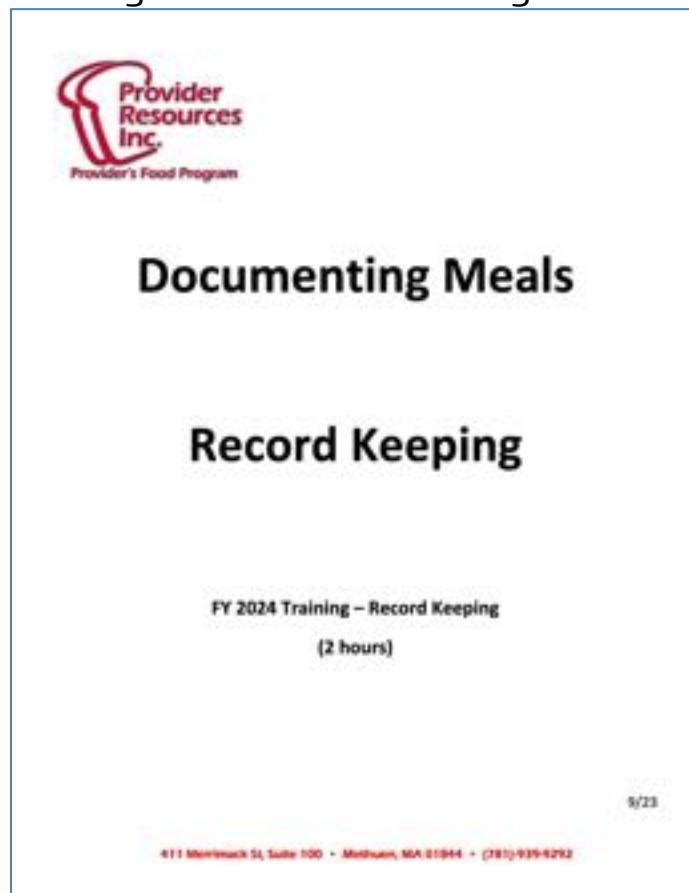


## **Documenting Meals**

### **Record Keeping Training – 2 Hours (FY 2024)**

To receive 2 hours credit for this training please do the following:

1. Read through the Training entitled “Documenting Meals”.



2. After reading the training, answer all the Review questions on the Review Form (either on-line or by hand to mail in).

Enjoy using this training!

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Office of the Assistant Secretary for Civil Rights  
1400 Independence Avenue, SW  
Washington, D.C. 20250-9410;
- (2) fax: (202) 690-7442; or
- (3) email: [program.intake@usda.gov](mailto:program.intake@usda.gov).

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# Documenting Meals

## Record Keeping

**FY 2024 Training – Record Keeping**

**(2 hours)**

9/23

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## Record Keeping

On October 1, 2017, the USDA, or United States Department of Agriculture, updated the food program meal patterns to keep up with nutritional science recommendations.

The updated meal patterns and food recommendations require that record keeping for menus be updated as well. Those requirements require providers be more specific about the foods being served. The updates and changes to these components mean that providers need to carefully document meals and snacks with more specific details than previously required.

Any meals not recorded in compliance with the 2017 meal patterns will be disallowed and you will not be paid for them.

This training provides a general overview of the new meal patterns and requirements, but also explores some other topics that we feel are worthy of reminders. These topics include infant menus, submitting claims, enrollment forms, understanding error reports, and other reminders.

We hope this training helps you to avoid unnecessary deductions from your claims by having all your documentation complete and accurate.

## Documenting meals

### *Reminders related to the new meal pattern requirements*

This section of the training summarizes and outlines some of the meal pattern requirements and provides reminders that we feel would be beneficial to you. Following these general guidelines will help you avoid any deductions for improperly documented meals. If you are still uncertain about all of the new meal pattern requirements, please either revisit the FY18 and FY19 Trainings, or call us and we can help you.

#### **Breakfast requirements:**

1. **Optional Meat / meat alternate:** A meat / meat alternate can be substituted for a grain component up to three times per week for breakfast only. Remember this is grain only, it cannot replace a Fruit/Vegetable or Milk component. You need to identify the specific meat or alternate. (example: Ham, Egg, Am. Cheese etc.)
2. **Bread / bread alternate:** Grain is a required component at breakfast (unless being substituted per the meat / alternate mentioned above). All grains served must be enriched or whole grain. Keep in mind that one grain serving per day must be whole grain and you must identify it on your menus. You need to identify the specific bread or alternate. (example: Wheaties cereal, corn bread, English muffin)
3. **Fruit:** Fruit and vegetables are separate components but either one can be served at breakfast. You must identify the specific fruit or vegetable. (example: apples, strawberries etc.)
4. **Vegetable:** Fruit and vegetables are separate components but either one can be served at breakfast. You must identify the specific fruit or vegetable. (example: hash browns, sweet potato, etc.)
5. **Milk:** All milk must be unflavored for children under the age of 6 yrs.
  - Children 12-24 months require whole milk.
  - Children 2-5 years require either 1% unflavored or Skim/Fat-free unflavored milk.
  - Children 6 years or more require either 1% unflavored, skim /fat free unflavored, or skim/fat free flavored milk.
  - Alternative milks must be considered nutritionally equivalent, such as Lactaid and Soy, in order to be creditable. If you find it necessary to substitute milk, you should contact the office to verify the credibility to avoid a deduction. If the milk is deemed non-creditable, a medical statement would be required to be reimbursed for it.

## Lunch/Dinner Requirements:

1. **Meat / meat alternate:** You must identify the specific meat or alternate that you are serving. (example: Ground Beef, Chicken, Egg, Kidney Beans, etc.)
2. **Bread / bread alternate:** You need to identify the specific bread or alternate that you are serving. (example: WW Bread, Syrian bread, dinner roll etc.) Keeping in mind that one of your bread or alternates must be whole grain once per day.
3. **Vegetable:** You need to serve and identify one vegetable (example: carrots, peas, etc.) for lunches and dinner.
4. **Either a fruit or vegetable** must be served as a second component. Keep in mind a second vegetable may be served but serving 2 fruits at lunch and dinner would create a deduction for that meal. One must be a vegetable.
5. **Milk:** All milk must be unflavored for children under the age of 6 yrs.
  - Children 12-24 months require whole milk.
  - Children 2-5 years require either 1% unflavored or Skim/Fat-free unflavored milk.
  - Children 6 years or more require either 1% unflavored, skim /fat free unflavored, or skim/fat free flavored milk.
  - Alternative milks must be considered nutritionally equivalent, such as Lactaid and Soy, in order to be creditable. If you find it necessary to substitute milk, you should contact the office to verify the credibility to avoid a deduction. If the milk is deemed non-creditable, a medical statement would be required to be reimbursed for it.

**Fruits and vegetable  
are now separate  
components for lunch,  
dinner, and snack!**

## Snack Requirements

Snacks are different in that you are only required to serve two components from the 5 groups below. However, you cannot choose 2 from the same group. Be mindful that the fruits and vegetables are now separate food groups. Additionally, 100% juice can now only be served once a day.

1. **Meat/ Alternate:** You must identify the specific meat or alternate that you are serving. (example: Ham, Cottage Cheese, Am. Cheese etc.)
2. **Bread / Alternate:** You need to identify the specific bread or alternate that you are serving. (example: WW Crackers, Syrian Bread, Cheese Crackers, etc.) Keeping in mind that one of your bread or alternates must be whole grain once per day.
3. **Vegetable:** You need to identify the specific vegetable you are serving. (example: cucumber slices, Carrot Sticks, etc.)
4. **Fruit:** You need to identify the specific fruit you are serving. (example: apple, peaches, etc.)
5. **Milk:** All milk must be unflavored for children under the age of 6 yrs.
  - Children 12-24 months require whole milk.
  - Children 2-5 years require either 1% unflavored or Skim/Fat-free unflavored milk.
  - Children 6 years or more require either 1% unflavored, skim /fat free unflavored, or skim/fat free flavored milk.
  - Alternative milks must be considered nutritionally equivalent, such as Lactaid and Soy, in order to be creditable. If you find it necessary to substitute milk, you should contact the office to verify the credibility to avoid a deduction. If the milk is deemed non-creditable, a medical statement would be required to be reimbursed for it.

### Snack Examples

Example #1



Apples and Carrots



Oranges and Pears

**Oranges and pears are from the same food group.**

Example #2.



Dannon peach yogurt and Whole grain Ritz crackers



Dannon peach yogurt and American cheese

**Yogurt and Cheese are from the same food group.**



## Infant Meals and Infant Menus

Rules around infant meals and menus are often ignored because many providers do not have infants. However, if you start an infant and are not aware of the differences, it could result in an immediate disallowance on your first claim with infants. Therefore, we strongly recommend you familiarize yourself with the infant rules even if you don't currently have any enrolled.

- Infants should be fed when they show signs of hunger, also known as **On-Demand** feeding, and may not fall within contracted mealtimes. As long as all of the required foods and amounts of foods are offered to the infant over the course of the day, the meals are reimbursable under CACFP. Infants are slowly introduced to solid foods.
- Infants 0-5 months are required to be **offered** 4-6 oz of Iron Fortified Infant Formula (IFIF) or breastmilk. Infants 6-11 months are required to be **offered** 6-8 oz of Iron Fortified Infant Formula (IFIF) or breastmilk.

***You must document the amount offered to an infant and not the amount the infant consumed, in order to be paid.***

- If the child is on breastmilk, the bottle must be labeled with the child's name and can be stored up to 72 hours from the time it was collected. The provider may also be reimbursed when the breastfeeding mother comes to the daycare home to directly feed her infant.
- Once the child becomes developmentally ready for solid foods you will be required to document the solid foods. Keep in mind that the infant should be consistently eating solid foods before you begin documenting it. Once you begin to serve the solid foods you must continue to offer them and document them as the child is now developmentally ready and it becomes a requirement. Remember to write the amounts that you offer for food too.

Here is an example of how to record a complete Breakfast meal for a 6-11 month old infant who is developmentally ready for all components:

***6 oz Iron Fortified Infant Formula (IFIF),  
4 Tbsp. Iron Fortified Infant Cereal (IFIC), 2 Tbsp. Carrots***

Even if the infant only consumed 3 oz of the formula, 1 Tbsp of the cereal, and none of the carrots, you would record the meal as it was served per the example above.

Recording what he consumed would result in a disallowance.

- Each infant is required to have their own meal plan. This is often neglected or misunderstood. If you are submitting your claims online, the software will guide you to record each meal separately for the individual infant regardless of age, so it's easy! For those few providers who are still using scannable form menus, please follow the guidelines below to ensure you are paid correctly. And be aware that the ability to use these scannable form menus will be going away very soon.
  - If you have 2 infants in different age groups, one is 1 month old and the other 9 months old, you could use one scannable form menu as it has 2 different age groups spaces for recording separate meal plans.
  - When you have 2 infants that are the same age there is only one section to record a meal. Regardless of if you are serving the same meal or not you are required you to have each meal documented separately. Therefore 2 separate scannable form menus, one for each infant, will need to be filled out.
  - Submitting only one Menu for 2 infants of the same age group will result in the disallowance of one of the infants.

### **Other Infant reminders...**

- Solid foods must be served to infants over 6 months when developmentally ready.
- Not all formula served to infants is creditable.  
Contact PRI if you are not sure.
- 100% Juice is no longer creditable for infants.
- Infants 6-11 months old, who are developmentally ready for solid foods, must be served 3 components at snack.

## **Claim Submission Options and Reminders**

Currently we offer one main option for submitting their claims to Provider Resources Inc. This is by using Minute Menus KidKare website online at KidKare.com. Although this year there are a very small number of providers still submitting their claims on paper using Minute Menus Scannable Bubble Forms. Please be advised that while we still have these reminders and instructions for paper menus, these are being discontinued and will no longer be available in the near future. Below are some highlights and reminders of each option to ensure that your meals are recorded properly and are fully reimbursable.

### **Claiming Online using [www.KidKare.com](http://www.KidKare.com)**

Claiming online using [www.KidKare.com](http://www.KidKare.com) is by far the fastest, easiest, and most accurate way to claim for your meal reimbursements. KidKare walks you through each process in a very user-friendly way.

A few reminders to be aware of using KidKare:

- When you start using KidKare, all your enrolled children are already there and ready to be claimed. As you enroll children in your program you can either enter them yourself for quicker access and then send us the enrollment form for activation, or just send us the enrollment form and let us do it for you. Either way you still must do an original PRI enrollment form (not the form KidKare produces) and send it to the office for activation. Any children you enter will be available for you to record meals, but we will not be able to pay you until we get the original enrollment form in our office and activate the child. If you see a child is “pending” then you know we have not received the enrollment yet.
- You must still serve and document at least one Whole Grain item per day by selecting the “Is this whole grain-rich?” yes/no slider. If a food item is whole grain rich by default, then the item will already say “yes”. But if not, and your product clearly states whole grain rich, you must mark it “yes” manually.
- If a school aged child attends your program for a full day due to illness, school vacation day, or attending on a holiday, you must indicate this when recording your attendance in order to be paid for the mid-day meals. Otherwise, the system will assume it’s a mistake and disallow the meals. To do this, select the 3 small lines next to the child’s name when recording your meal and attendance and select either “Sick”, “No school”, or “Present on Holiday”.

## Claiming on paper using Minute Menus Scannable Bubble Forms

**PLEASE BE AWARE THESE ARE BEING DISCONTINUED AND  
WILL NO LONGER BE AVAILABLE IN THE NEAR FUTURE.**

The following are things that you need to be aware of when submitting your scan menu forms so that you are paid correctly.

- It is important to remember to circle in the correct month at the top of the scan menus. Circling in the wrong month on any one of the menus could cause a deduction.
- On the top left corner of the menu is where you will circle in your 4-digit site number that you received from the office when you joined our program. It is important to fill this in, so the computer knows who's menus they are.
- There is a new bubble where you will indicate which meal or meals you served a whole grain item. Be mindful you must serve a whole grain item once per day. Be sure to fill in this bubble to be credited for your whole grain item.
- In the box where you list the food components, there is a small bubble in the upper left-hand corner. This bubble must be filled in for each meal you are claiming for in order for the software to identify it and pay for it. If it is not filled in the computer will ignore the meal entirely and you will not be paid.
- Next to the box where the food components are identified, you must fill in the bubble matching each child's number that is in attendance.
- Be sure to sign your menus.

## **Reviewing your Claim Error Reports**

Regardless of how you submit your claims, there is a potential that you could be disallowed for any given meal or child. Therefore, it is important to read your Claim Error Reports to be certain your claim was processed correctly. Errors could occur from a number of things. Maybe you forgot to send in an enrollment, or the enrollment never got to the office. Maybe a circle on the bubble menus was not dark enough and didn't get read by the scanner. Contacting the office allows us to adjust an incorrect deduction. Providers who submit their claims on scan forms will be mailed an error report. Providers who submit their claims online in KidKare.com can access their error reports in KidKare after your claim has been processed. It is your responsibility to look at this form once its available and review it for any errors.

## Child Enrollment Form Reminders

- To ensure that you are paid correctly, it is important to have the enrollment forms filled out correctly. [The parent or guardian doesn't always understand the details of claiming their child on the food program. A wrong box can affect how you will be reimbursed.](#) Reviewing completed enrollments with the parent will alleviate incorrect information being documented. The parent/guardian must complete the form with current information, schedules, meals allowed, etc. They also must sign and date the form in the month the child starts, or the change is to be affective for. We cannot reimburse for a child without having the signed original enrollment submitted to our office and the provider must keep a copy of each enrollment form for her files as well.
- Be certain to have the parent/guardian fill in the child's name, date of birth, date started in day care and both the times and the days that the child will be enrolled in daycare. If the child's **schedule** will **vary**, check off all days that the child might possibly attend normally and check the days vary box with the additional days included. When filling out the expected meals, have the parent list every possible meal, even if the child is there for said meal only occasionally. If this child is **school age** please note the times the child is in school. If the child will attend your day care on school vacation and no school days, it is important to list the times they will be there and all the meals they may participate in.
- Be sure to fill in the infant selections for a child under the age of 1.
- A provider offering substitute care must have an enrollment on file for each child. If the child is already enrolled with a PRI provider, you may obtain a copy of the enrollment from the main office. If not, you must have the parent fill out a new PRI Enrollment form.
- Each enrollment form is effective for a maximum of one year. However, PRI does an annual Re-Enrollment project every September-October. This allows for all children to be reset for a full calendar year. If you have the same children for many years in a row, this allows for you to be paid after the first year. If you only have children for a short period of time and they are gone by the time re-enrollment comes around, you will not have to re-enroll them.

# USDA Meal Pattern Changes Record Keeping– FY 2024

# Training Review

*This review MUST be sent in to the office to receive your 2-hour credit.*

Provider Name: \_\_\_\_\_

| Please answer the following questions:  | Circle One |
|---|------------|
| 1. A meat / meat alternate can be substituted for a grain component up to three times per week for any meal.  | T F        |
| 2. One grain serving per day must be whole grain and you must identify it on your menus.  | T F        |
| 3. 100% juice can now only be served once a day   | T F        |
| 4. Fruits and vegetables are separate components for lunch, dinner, and snacks.   | T F        |
| 5. You may now serve 2 fruits at lunch or dinner instead of a vegetable.  | T F        |
| 6. Alternative milks must be considered nutritionally equivalent, such as Lactaid and Soy, in order to be creditable.   | T F        |
| 7. Snacks are different in that you are only required to serve two components from the 5 groups.  | T F        |
| 8. You must specify the type of meat or alternate that you served to be creditable.   | T F        |
| 9. On Demand feeding means that infants should be fed when they show signs of hunger.   | T F        |
| 10. Infants are required to consume <i>all</i> of the food offered to them in order to gain credit for the meal.  | T F        |
| 11. The provider cannot be reimbursed when the breastfeeding mother comes to the daycare home to directly feed her infant.  | T F        |
| 12. Once you begin to serve the solid foods you must continue to offer them and document them on your menus.  | T F        |
| 13. Each infant is required to have their own meal plan.  | T F        |
| 14. For infants, regardless of if you are serving the same meal or not you are required you to have each meal documented separately.  | T F        |
| 15. All formula served to infants is creditable.  | T F        |
| 16. 100% juice is creditable for infants.   | T F        |
| 17. PRI will not be able to reimburse you until the original enrollment form is received in the office.   | T F        |
| 18. If a school aged child attends your program for a full day due to illness, school vacation day, or attending on a holiday, you must indicate this when recording your attendance in order to be paid for the mid-day meals. | T F        |
| 19. You no longer need to sign your menus.  | T F        |
| 20. It is your responsibility to look at the Claim Error Report once its available and review it for any errors.  | T F        |
| 21. The provider should review the completed Enrollment form with the parent.   | T F        |
| 22. You will be reimbursed for a child even if a signed Enrollment form has not been received in the office.  | T F        |
| 23. The parent list every possible meal on the Enrollment, even if the child is there for said meal only occasionally.  | T F        |
| 24. If the child is school age you should note the times the child is in school on the Enrollment.  | T F        |
| 25. Each Enrollment form is good for the life of the child.   | T F        |

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date