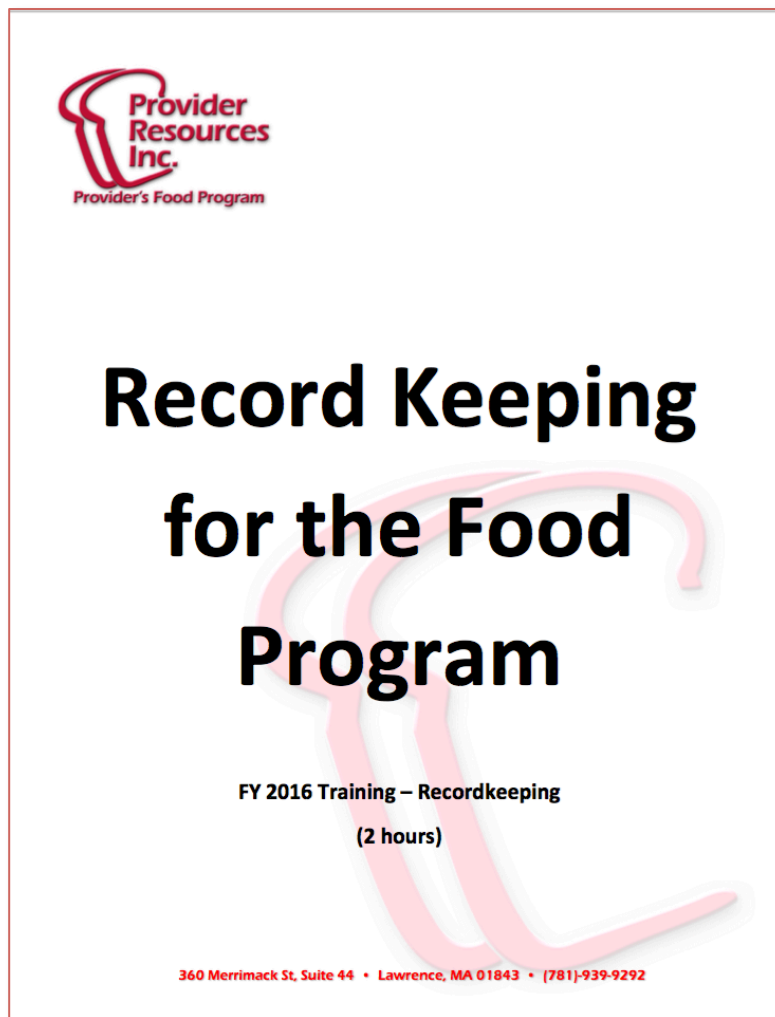




Record Keeping for the Food Program **Record Keeping Training – 2 Hours (FY 2016)**

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

1. Read through the “Record Keeping for the Food Program” guide.



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

Enjoy using this training!



Record Keeping for the Food Program

**FY 2016 Training – Recordkeeping
(2 hours)**

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Introduction

Why is record keeping an important training for providers in the Food Program? Record keeping is a way for each provider in the Food Program to follow the policies and procedures required by the USDA in order to be reimbursed for food service. You, the provider must keep up-to-date and accurate records so the Food Program can ensure you are following meal patterns, noting attendance and keeping updated enrollments.

This training will help you to understand the importance of your record keeping. Accurate and current records speed up the claim process and allow you to be reimbursed correctly and in a timely manner.

Record Keeping Starts at Signup

The documentation and record keeping starts when you join the Food Program. When a monitor signs up a provider for the program, the provider will receive a manual that includes a number of forms to start the collection of records to keep. Providers will sign 3 forms at the sign up: the site agreement, the permanent agreement and the CACFP Family Daycare Home Certificate. Providers will keep these forms in their permanent files. Providers will receive a new folder annually so that the forms can be kept in with all additional forms.

Record Keeping for Menus

Scanned vs. Web Menus

The records that you are most familiar with are menus. The two types of menus are scanned menus and web-based menus. Scanned and web-based menus only differ in how the menus are submitted. Both types of menus require the same meal pattern and attendance.

Scanned Menus

Scanned menus are paper menus that are submitted to the office via mail or in person. When filling out scanned menus it is critical to fully darken bubbles for dates, site numbers, meals included and attendance. Providers must also write in the meal components.

Web Menus

Web menus are completed and submitted on the Internet. Providers Resources uses the computer program called Minute Menu. Providers log into Minute Menu and enter complete meal patterns and attendance. At the end of the month, web menus are submitted electronically.

Meal Pattern

You are required to serve milk at all meals. Children over 2 years old should be served either skim or 1% milk. Children 1-2 years old should be served Whole milk.

Breakfast: Breakfast requires three components –

- Bread or bread alternate,
- Fruit or vegetable
- Milk.

Although eggs are nutritious and creditable, they do not satisfy a requirement for components needed at breakfast. They can be served as an extra food at breakfast. However, you cannot eliminate the required foods. Keep in mind that if you serve juice, it must be 100% juice. When writing 'juice' on a menu, do be sure to list the type of juice and that it is in fact 100% (Example: 100% apple juice, 100% orange juice etc.).

Breads should be listed as (wheat bread, English muffins, Syrian bread Etc.)

Lunch and Dinner: When serving lunch and dinner, five components are required.

- Meat or meat alternate
- Bread or bread alternate
- Fruit or vegetable
- Fruit or vegetable
- Milk.

All these components must be served.

Snacks: When serving snacks it is required that you choose two components from different food groups.

Pick 2 components:

- Meat or meat alternate
- Bread or bread alternate
- Fruit or vegetable
- Milk

Serving two components from the fruit/vegetable group would not be creditable because they are both from the same food group. For example, cucumbers and apple juice is not a creditable snack because they are from the same food group.

Planning meals and snacks according to the meal pattern is the first step in record keeping for your menus. Correctly documenting the foods on your menus helps the Food Program review the menus and prepare your claims for payment. Meals that do not follow the meal pattern or are not documented correctly must be deducted.

Attendance

Documenting the meal count is an important part of record keeping. Noting the meal count at the time of meal or snack service, or by day's end, is critical for reimbursement. Any meal or snack that has a meal count that is not completed by the end of the day of service risks not being reimbursed. Monitors carefully look over menus at home visits to make sure that the meal count is up to date.

Cycle Menu

Some providers choose to use cycle menus for their meals. Cycle menus are prewritten meals that satisfy the requirements for the meal pattern. Cycle menus are typically four weeks of menus that get repeated. When making copies of cycle menus, it is important to write dates on the menus for the days of the week and the calendar dates. Providers who use cycle menus need to make a note on their menus if they substitute out a different food than is listed. While cycle menus can be written well in advance, attendance must be noted the day of service. If you are using Cycle Menus and also keeping attendance as your paper back up, you must indicate what meals you will be claiming for each child each day.

Example:

B = Breakfast

L = Lunch

D = Dinner

AM = AM snack

PM = PM Snack

EV = Evening snack (if applicable)

Infant Menu

Infant Menu (scanned forms)

There are important things to keep in mind while documenting meals and attendance for infant menus. If you have two infants (or more) in the same age category, the meals need to be documented in separate places. One can be written on the menu itself. The second infant's meal needs to be documented elsewhere. We suggest noting the second meal on the back of the menu or a separate piece of paper. However, the attendance for all infants needs to be bubbled together on one form.

Infant Menu (web based)

In Minute Menu, first you need to click on infant menus and then select the infant's name from the list. A drop down box will appear and you can select foods for each infant individually.

Submission of Menus

It is important that both scanned menus and web menus are submitted in a timely fashion. Providers who submit their menus by the third of the month will be guaranteed payment by the 20th of the month. Providers who submit menus on the fourth or fifth of the month will be on the first bill. These providers will be reimbursed as soon as PRI receives the funds from the State. Menus that are received after the 5th of the month will be on the second bill and will be reimbursed when PRI receives funds from the State for the second bill. Please note that we have no control over the postal service. Mail is date stamped on the date we receive it. Web claiming avoids this problem.

Claim Error Reports

When your menus are processed by PRI error reports are generated for all submitted menus. Error reports are then sent via mail to providers who submit scanned menus. Error reports are generated on the Minute Menu web page for providers who submit web menus. Error reports are an excellent way for you to learn more about the record keeping process. If you have any error messages, you can learn how to fix those mistakes on future menus by examining the report. For example: Some common errors related to record keeping include missing enrollment forms and incorrect meal patterns. Reviewing error reports will also help to improve your own record keeping.



Record Keeping for Enrollments

Enrollment forms are another important part of the record keeping process. Unlike menus, which are submitted at the end of the month. Enrollments can be submitted at any time during the month. You must submit an enrollment form for every child in your home daycare. All children in your daycare must be offered the opportunity to participate in the food program. If a parent wishes to refuse the program they need to check off the box “I DO NOT request that my child receive the above CACFP benefits” on their enrollment form.

It is important to have the parent fill out the enrollment form for the month they enroll into your daycare.

General Enrollment Record Keeping Reminders

Enrollment forms can be very confusing. It can be helpful when you, the provider, help the parents to fill out the enrollment form at the time of intake. It would also be a good time for you to discuss the food program and explain the parents’ options so that you may bill for meals and snacks properly.

For providers using scanned menus, remember that you cannot reassign a child’s number in the middle of the month. Also if you wish to reuse a number, you must remove the current child before you can reassign that child’s number to another child.

When listing a child’s schedule, remember that enrollment forms should reflect all the days, times and meals that you will be claiming. If a child’s schedule has changed and you have not sent in an updated enrollment, you will be disallowed for any and all meals or snacks that are not on the current enrollment form. Sending in new and updated enrollment forms in advance helps the office to document changes prior to the claim. This can help to alleviate any delay with your claim.

Re-enrollment Record Keeping

There are some records that providers will be required to update annually. The re-enrollment process happens every year in April. At that time, providers also need to sign a new ‘Rights and Responsibilities’ form. A copy of this form should be kept in the provider’s own record keeping folder. Along with the Rights and Responsibilities form, a re-enrollment packet will be sent to you that includes copies of the enrollment forms for all of the children in your home daycare. The purpose of this re-enrollment process is to ensure that all information about the child’s personal information, parent information, and schedule are accurate and current. This is a yearly requirement. Parents should review their child’s enrollment form carefully and make any changes that are necessary. Upon review, parents should sign two copies. One will be submitted to the Food Program and the other will be kept for the provider’s records.

Record Keeping for Double Sessions

There are some forms that are part of record keeping that do not apply to all providers. Double Session forms apply to providers who serve a meal or snack at two different times to accommodate meals provided for more children than the license permits. For example, if a provider is licensed for six, the provider might serve breakfast at 7:00 for 4 children and 7:30 for 3 children. The provider is not allowed to have seven children in their daycare at any given time. However, due to a scheduling difference, the provider serves breakfast to some of the children who might be leaving for school and then serves children breakfast that arrive at a slightly later time. Providers who wish to do double sessions need to fill out a form and be pre-approved to do so. This form needs to be completed annually and must be updated if changes occur.

Record Keeping for Income Eligibility

The Income Eligibility form is another form that does not apply to all providers. Some providers are Tier I providers because they are school or census qualified. Any provider who is school or census qualified who wishes to claim their own child must fill out an income eligibility form for their own child. For providers who are not school or census qualified yet, but think they meet income requirements, they may also submit an income eligibility form and proof of income for review. Income eligibility is determined on an annual basis and appropriate documentation is required. Providing accurate information ensures that providers are paid for their appropriate tier level.

The same is true for providers that are Tier II, but have children who qualify for Tier I and thus are claiming as a Tier I-mixed home. The income eligibility for the participating children must be submitted annually for renewal.

Record Keeping for Miscellaneous Forms

Termination

In the event that a provider wishes to no longer participate in the food program, they must submit a 30-day notice to the office.

Licenses

Providers must have a daycare License in order to participate in the food program. Licenses must be renewed every three years. When your old license expires or changes in your license have been made it is important to send a copy of your new daycare license to the office.

Assistants

Some providers have assistants in their childcare home. Copies of assistants' licenses need to be submitted to the office as well. Furthermore, record keeping is an important discussion to have with assistants. Assistants should be familiar with the meal pattern and how to complete menus. This is important especially if assistants are left to serve meals without the provider present. This training might be a good thing to review with assistants to make sure they understand the elements of record keeping that may apply to them.

Wrap-Up

As this training has explained, records are a very important part of participation in the food program. Providers must be careful to accurately note all the elements of menus, and be timely in submissions of all documentation. Providers are expected to keep copies of all submitted documents for three years as well as documents for the current year. Which means providers should keep enrollment forms and copies of menus as well as any additional forms that are sent to the office. The more organized a provider keeps their records, the easier it is for record keeping files to be complete and current.

Record Keeping for the Food Program – FY 2016

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. Documentation and record keeping should start as soon as you join the Food Program.	T F
2. Scanned menus and web-based menus are completely different and do not require the same meal pattern and attendance.	T F
3. Eggs are nutritious and creditable for breakfast and can be used to replace Milk as a required component.	T F
4. When serving Snacks, serving two components from the Fruit/vegetable group are both creditable even though they are from the same food group.	T F
5. Any meal or snack that has attendance that is not completed by the end of the day of service risks not being reimbursed.	T F
6. Cycle Menus can be written well in advance so attendance does not need to be noted on the day of service.	T F
7. If you have two infants in the same category, the meals need to be documented in separate places.	T F
8. If you have two infants in the same category, the attendance bubbles should be on separate forms.	T F
9. Menus that are received after the 5 th of the month will be reimbursed when PRI receives the funds from the State for the 2 nd bill.	T F
10. Error reports are an excellent way for you to learn more about the record keeping process.	T F
11. Enrollments can be submitted at any time during the month.	T F
12. If a parent wishes to refuse the program they do not need to fill out an Enrollment form at all.	T F
13. If a child's schedule has changed and you have not sent in an updated enrollment, you will be reimbursed anyway for any meals that are not on the current enrollment form.	T F
14. The re-enrollment process happens every year in April.	T F
15. Parents should sign two copies of the enrollment form.	T F
16. Double Session forms need to be completed annually and must be updated if changes occur.	T F
17. Income eligibility is determined on an annual basis and appropriate documentation is required.	T F
18. When your old license expires, you do not need to send in a new license to the office.	T F
19. Assistants do not need to know about the meal pattern or how to complete menus.	T F
20. Providers are expected to keep copies of all submitted documents for 3 years (plus the current year).	T F

Signature _____

Date _____