

Sponsor Name	
Revision Date	

Maintaining CACFP Menu Records Procedure

Overview of Record Requirements:

- Sponsor must maintain menu records. All program records, including menu records, must be kept for three fiscal years, plus the current fiscal year (October to September).
- Menu records must show the Sponsor is meeting program meal requirements.
- Menu records must be on file for all meals claimed for reimbursement and must be made available to reviewers during Administrative Reviews.

Management Plan:

Institutional Structure and Capability: In this section, indicate the program staff who will be responsible for the following CACFP functions.

CACFP Function	Staff Position(s)/Title(s)
Purchasing and preparing food	
Planning menus	

Recordkeeping: Where are the following records kept?

CACFP Menu Record	Central Office	Site	Online	Not Applicable
Menu Records*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Infant Menu Records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*Menu records include: Planned menu, working menu, recipes, and menu supporting documentation

Meal Service Requirements: What methods are used to ensure meals meet the meal patterns set forth in [7 CFR 226.20](#)? (Check all that apply)

Check Here	Methods Used
<input type="checkbox"/>	Plan and evaluate menus to ensure CACFP meal pattern compliance
<input type="checkbox"/>	Consult USDA menu planning references; e.g. Food Buying Guide , CACFP Handbook
<input type="checkbox"/>	Use USDA recipes (ICN Child Nutrition Recipe Box)
<input type="checkbox"/>	Maintain menu documentation; e.g. recipes, CN labels, PFS, Standard of Identity Product labels, etc.
<input type="checkbox"/>	Provide staff training on meal pattern requirements
<input type="checkbox"/>	Ensure adequate amounts of food and milk are purchased, prepared, and served
<input type="checkbox"/>	Perform meal observations to ensure amounts served meet or exceed minimum portion sizes for age group(s) of participants served
<input type="checkbox"/>	Ensure dated menus document actual foods served daily (substitutions due to menu changes are recorded on a working menu)
<input type="checkbox"/>	Other, provide explanation here:

Procedure for Maintaining CACFP Menu Records:

A. Record Process & Timeline:

1. Creating a menu

Position responsible for menu creation	
Back-up position(s)	
Menu cycle length (e.g. monthly, bi-monthly, etc)	
Position responsible to ensure menu meets all documentation requirements (see a-c below)	
Back-up position(s)	

a. Documentation requirements include:

1. Date (month, day, year the meals/snacks were served)
2. Site name (location), if the Sponsor has more than one site
3. The current USDA nondiscrimination statement
4. Actual food items served, including the specific name or type of food
5. Whole grain rich items are identified
6. Substitutions made for disabilities or medical or other special dietary needs.

The substitution documentation must include:

- i. The date
- ii. The meal or snack served
- iii. The participant's name if the substitution is for a specific participant due to a disability or medical or other special dietary need
- iv. The food item(s) substituted

7. Type of milk served

b. Meal pattern requirements

1. Minimum serving of the five components that meet nutritional requirements based on participants age
2. At least one serving of grains per day must be whole-grain rich

c. Resources used/reviewed:

1. CACFP Meal Pattern Chart: [Child](#) | [Infant](#) | [Adult](#)
2. [Documenting Your CACFP Menu](#)
3. Other resources: _____

2. Reviewing the Planned Menu

Position responsible for reviewing the planned menus prior to the month they are served	
Back-up position(s)	
When planned menus will be reviewed (e.g. number of days)	

Describe the steps that will be taken to correct the error or incomplete documentation prior to the month they are served and the position(s) responsible:

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3. Infant Menus Not Applicable

Position responsible for ensuring the appropriate age from is used according to the infant’s birthdate	
Back-up position(s)	
Position responsible for ensuring that a separate menu documentation is completed for each infant and includes all requirement documentation (see a below)	
Back-up positions(s)	

a. Infant menu documentation must include:

1. The infant’s name and date of birth
2. The menu date (month, day and year)
3. The type of meal (breakfast, lunch, supper or snack)
4. All actual food items served
5. The name of formula or that breast milk was served
6. If food or formula is supplied by the parent/guardian

b. Resources used/reviewed:

1. ODE CNP Daily Infant Menu Records: [0-5 Months](#) | [6-11 Months](#)
2. [Infant Menu Record Instructions](#)
3. [Feeding Infants in the CACFP Guide](#)
4. Other resources: _____

4. Review of Working Menus

When will the working menus be checked to ensure that it meets meal pattern requirements? (e.g. monthly, weekly, etc.)	
Position responsible for reviewing the working menu to ensure any substitutions or changes made to the planned menu are documented and meet meal pattern requirements	
Back-up position(s)	
Position responsible for ensuring that meal accommodations documented on the menu are supported by a completed Medical Statement and/or Meal Preference Request Form (see section A.8)	
Back-up position(s)	
Position responsible for fixing any identified errors	
Back-up position(s)	

Describe the steps that will be taken to have the staff correct any documentation errors. Include a description of the steps staff will take to identify and document any meals that are not able to be claimed based on not meeting meal pattern.

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5. Vended Meals

Not Applicable

Vendor Name	
When will planned menus be submitted by the vendor to the Sponsor?	
Position responsible for collecting planned menu from the vendor	
Back-up position(s)	
Position responsible for ensuring the menu has all required documentation and meets meal pattern requirements?	
Back-up position(s)	

Describe the steps that will be taken to have the vendor correct the menu prior to menu implementation if the submitted menu results in non-creditable meals. Include how this communication will occur and a timeline of when corrections will be made.

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6. Standardized Recipes

Not Applicable

Standardized Recipes are required for all homemade combination foods, where multiple ingredients are assembled for a credited food item meeting meal pattern requirements.

a. Standardized recipes must include the following information:

1. Name of recipe matching the item as listed on the menu
2. All ingredients with weight or volume amounts (ounces, pounds, cups, etc.)
3. The form of each ingredient (cooked, raw, chopped, shredded, etc.)
4. Serving size of the finished product for each age group served
5. Yield (total number of servings the recipe makes, or total measured amount such as 1 gallon, two 11" x 13" pans cut in 24 pieces, etc.)
6. The meal component contribution (i.e., Meat/Meat Alternate, Grains/Breads, Vegetables or Fruits), also known as crediting
7. Complete instructions for the preparation and service of the food item

b. Sponsors may use **pre-approved recipes** that are standardized, credited, and verified for Child Nutrition Programs by a vetted source or create and credit standardized **homemade recipes** using the Food Buying Guide.

Pre-Approved Recipes Used for Menus:

Position responsible for compiling pre-approved recipes from a credible source	
Back-up position(s)	
Recipes are sourced from:	<input type="checkbox"/> Institute of Child Nutrition <input type="checkbox"/> FoodHero.org <input type="checkbox"/> Other:
When will recipes be compiled prior to the menu cycle beginning? (e.g. week, month, days)	
Position responsible for reviewing recipe sources to ensure recipes are up to date and correctly credited	
Back-up position(s)	
When will recipe sources be reviewed to ensure recipes are up to date?	

Describe the steps that will be taken to ensure all recipes are current and correct.

Will pre-approved recipes be modified?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, what position will be responsible for ensuring that crediting of the modified recipe is accurate?		
Back-up position(s)		

Describe the steps that will be taken to modify the recipe and update the crediting.

Homemade Recipes Used for Menus:

Position responsible for creating homemade recipes for use in CACFP menus	
Back-up position(s)	
When will recipes be created prior to the menu cycle beginning? (e.g. week, month, days)	
Position responsible for ensuring homemade recipes include all required documentation for standardized recipes (see 6a on page 4)	
Back-up position(s)	
Position responsible for reviewing homemade recipes regularly to ensure recipes are up to date and correctly credited	
Back-up position(s)	
Frequency of reviewing homemade recipes (e.g. monthly, quarterly, yearly)	

Describe the steps taken if recipes are incorrect and need to be updated.

a. Resources used/reviewed:

1. [Food Buying Guide](#) – Recipe Analysis Workbook for Crediting
2. [Combination Food Recipe Template with Instructions](#)

7. Additional Required Documentation

Not Applicable

Position responsible to ensure all required additional documentation are on file (see a below)	
Back-up position(s)	
Position responsible to review menu documentation to ensure all required documentation is on file and up to date (see a below)	
Back-up position(s)	
When will menu documentation be reviewed? (E.g. bi-monthly, annual, etc.)	

a. Additional meal pattern documentation requirements:

1. Child Nutrition (CN) Label - Commercially prepared combination food items must have a CN Label on file to document the crediting for meat/meat alternate and grain/bread if applicable
2. Ingredient Labels with manufacturer’s name and brand name for enriched and whole grain-rich products
3. Manufacturer’s Product Formulation Statement (PFS)- commercially prepared food items that do not have a CN Label must have a complete PFS on file for any food item that is served and counted toward required meal pattern components
4. Standard of Identity Product labels – Required for all commercial combination food items that have a Standard of Identity and are served and counted toward required meal pattern components.
5. Nutrition Facts labels with manufacturer’s name and brand name for breakfast cereals, yogurt and tofu

b. Resources used/reviewed:

1. [Documenting Your CACFP Menu](#)

8. Meal Accommodations and Modifications

Meal accommodations must be made for participants with a medical need or disability. Accommodations requested for non-medical reasons may be accommodated based on the Sponsor’s internal policies.

Describe how your organization notifies families of the option to request a meal accommodation for a medical need or disability. Include the position(s) responsible.

Describe your internal policies on medical and non-medical meal accommodations.

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Position responsible for providing the Medical Statement to a parent/guardian when a medical meal accommodation is requested	
Back-up position(s)	
If applicable: Position responsible for providing the Meal Preference Request Form to a parent/guardian when a non-medical meal accommodation is requested	
Back-up position(s)	
Position responsible for following up with the parent/guardian if a Medical Statement and/or a Meal Preference Request Form is not received	
Position responsible for reviewing the forms for completion within _____ days of receipt	
Back-up position(s)	

Describe the process that staff will follow if the Medical Statement and/or Meal Preference Request Form is incomplete. Include the position(s) responsible.

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After the Medical Statement or Meal Preference Request Form is complete, describe the next step in the process for implementing the meal accommodation and modifications. Include where the form is filed, who must be told about the meal accommodations, how meal accommodations are tracked for participants, etc.

9. Additional Procedures: Include any additional menu and meal pattern procedures implemented at your organization for CACFP.

a. Resources used/reviewed:

1. [ODE CNP's Meal Accommodations and Modifications Page](#)
2. [Medical Statement](#)
3. [Meal Preference Request Form](#)
4. [Meal Accommodation Quick Guide for Sponsors](#)
5. [Meal Accommodation Decision Tree](#)

B. Where Records are Kept:

Describe the location (room, cabinet, file folder) where the following records are maintained. Include any additional information that would be necessary for someone to locate these documents.

Planned Menu	
Working Menu	
Recipes	
Additional Menu Documentation	