OTHER RESOURCES

In addition to the User’s Guide: Menu Items, you may use the following resources to learn more about “Menu Items” in MENU Module.

PRIMERO EDGE’S MENU PLANNING USER MANUAL
• Page 40-41
• Page 48-50

PRIMERO EDGE VIDEO TRAINING LIBRARY
• 1- Create a Menu Item
CREATING MENU ITEMS: BASIC INFORMATION

1. Click on the “Menu Planning” tab.

2. Click on the “Ingredients” folder.

3. Click on the “Recipes” subfolder.

4. Narrow recipe search using the “Recipe Search Criteria.”

5. Click on the recipe link for the recipe associated with the menu item you want to create.

   Note: Remember that each menu item in MENU Module will correspond to a single recipe within the system.

6. For non-“Local” database recipes (that have not been turned into menu items) create a copy of the recipe in the “Local” database by clicking on the “Copy” button of the “General” tab.

   Creating a local copy of a recipe activates the “Menu Item” tab and allows users to store menu item information for non-“Local” database recipes that have not been turned into menu items.
7. Click on the “Menu Item” tab for the recipe that you want to make into a menu item.

8. Enter the “Menu Item” name.
   Notice that the system automatically assigns the “Recipe Name” as the “Menu Item” name. Change the “Menu Item” name, if desired.

9. Enter the “Full Name” for the menu item.
   Notice that the system automatically assigns the “Recipe Name” as the “Full Name.” Change the name to a different “Full Name,” if desired.

10. Enter the “Marketing” Name.”
    The “Marketing Name” will display on the “Menu Calendar Report” (a menu for students and parents) and on the School Café app.

    Tip: Give the menu item a “Marketing Name” that will sound appealing to students and parents.

11. Optional: Enter a “Marketing Description” for your “Menu Item.”
    The “Marketing Description” provides a space to write an enticing, up to 5,000-character description of the menu item. The “Marketing Description” displays on the School Cafe App when users publish menus.

    Notice that users cannot edit the “Texas Grown” field. The system auto-populates the “Texas Grown” field based on whether the ingredients entered for the recipe are “Texas Grown.”

12. Select a “Menu Item Category” from the list.
    Remember that you can add or edit “Menu Item Categor(ies)” in the “Configuration” folder of the “Menu Planning” tab under “Menu Item Categories” if the pre-programed “Menu Item Categories” do not meet your needs. Avoid duplicating “Menu Item Categories” within the system when possible.

13. Optional: Check the “Preparation Site Item” box if this item is prepared at a different site.

14. Check the “Show in Summary” box for the item to display on the “Menu Calendar Report” (the menu calendar for students and parents.)

    For example, some users may want to exclude milk or condiments from the “Menu Calendar Report” for students and parents.
15. Select a “Leftover Category” (“Unspecified,” “Carryover,” “Return to Stock,” or “Waste.”)
   - Carryover: Staff should serve the remaining items for a certain number of days.
   - Return to Stock: Staff should return leftover items to stock (for example, individual serving milk cartons).
   - Waste: Staff should discard the leftover items.
   - Unspecified: All options remain available for the menu item on the food production record.

16. For “Carryover” items, select “Maximum Carryover Days.”
    This action limits staff that complete food production records from serving the leftover item for more days than the specified number.

17. Optional: Click on the “Upload Picture” button and follow the prompts to upload a menu item photograph.
    Uploaded photographs appear in the School Café App and serve to market your menu items to student and parents. Users should choose a good quality photograph that portrays the food item accurately. Users may find tips on taking quality menu item photographs, in the “Food Photography Basics” curriculum found on the MENU Module page of Squaremeals.org.

Tip: Using poor quality menu item photographs can hurt marketing efforts and discourage students from eating school food. Using high quality photos can entice students and encourage meal participation. Smart phone cameras can usually produce quality photographs, and districts do not need to invest in expensive, professional cameras to take good photographs.

18. Click on the “Save” button to create the menu item.
CREATING MENU ITEMS: SERVING SIZES

Notice that when you click on the “Save” button, the system generates a section in the “Menu Item” tab called “Available Menu Item Serving Sizes,” “Contributions,” “Default Serving Size Exceptions,” and “Smart Snacks.”

1. **Scroll down to view the “Available Menu Item Serving Sizes” section.**
   Notice that the system automatically generates the serving size listed in the recipe (in the “General” tab) as the default “Menu Item” serving size.

   Tip: Always make sure to use the same serving size unit (for example, fluid ounces, each, cups, etc.) for the recipe (“General” tab) and menu item (“Menu Item” tab). Different serving size units in the “General” and “Menu Item” tab will cause errors in the system.

2. **Optional: Click on the “Add New Serving Size” plus sign box to add a new menu item serving size.** This selection allows users to offer the same menu item in different serving sizes.
   Example: For example, a district may want to use the same spaghetti recipe for K-5 students and 9-12 students but offer K-5 students ½ cup of pasta and 9-12 students 1 cup of pasta.

   **3. Enter the number and select the unit from the drop down box for the additional serving size.**

   **4. Optional: Enter a “Portioning Tool” staff should use to portion the serving (for example, a #4 scoop, #8 scoop, etc.).**

   **5. Click on the “Is Default” box to make the new serving size the default serving size for the menu item.**

   **6. Click on the “Insert” link to save the new serving size.**
Notice that the system adds the new serving to the “Available Menu Item Serving Sizes” table. To edit or to delete the menu item select the pencil icon and trash can icon, respectively, and follow the prompts.

7. Optional: Scroll down to view the “Default Serving Size Exceptions” section. Click on the “Add New Serving Size Exception For Serving Group” if you want to assign a different default menu item serving size for a specific serving group.

a. Select a meal pattern from the first drop down box labeled “Serving Group.”

b. Select a “Serving Group” from the second drop down box.

c. Select a “Serving Size” from the drop down box.

d. Click on the “Insert” link to save the new default serving size for the serving group.

Now, anytime a user adds the menu item to a menu, for the selected serving group, the system will automatically use the serving size exception.
CREATING MENU ITEMS: FOOD COMPONENT CONTRIBUTIONS

1. From the “Default Serving Size Exception,” section scroll up to the “Contributions” section.

Notice that the word “Contributions” is followed by a hyphen and a serving size. Because different serving sizes do not contribute the same meal contribution, users must enter the meal contribution for each menu item serving size.

Notice that the system highlights the selected serving size in the “Available Menu Item Serving Sizes” section.

The following steps allow users to assign the “Food Component” contribution for the serving sizes (listed to the right of the word “Contributions”).

2. For fluid milk menu items, select one milk option from the “Milk Type” drop down box.

3. For fruit and or vegetable juice or a grain-based dessert menu items, select the applicable check boxes: “Fruit Juice,” “Vegetable Juice,” or “Grain Based Dessert.”

4. Scroll down to the “Food Component” section and select a menu item “Contribution” amount for the “Food Component(s)” that the menu item contributes to.

Notice that, for “Grains,” users must select ‘Whole Grain-Rich” or “Non Whole Grains-Rich.”

Notice that, for “Vegetables,” users must select the “Vegetables” subgroup, “Dark Green,” “Red/Orange,” “Beans/Peas (Legumes),” “Starchy,” or “Other.”

Notice that the system records the “Fruits,” “Fluid Milk,” and “Vegetables” “Food Component(s)” in increments of \( \frac{1}{8} \) cups.

Notice that the system records “Meat/Meat Alternates” and “Grains” “Food Component(s)” in increments of \( \frac{1}{4} \) oz. eq..

5. Click on the “Save” button to save the “Food Component” contribution for the serving size.
Enter contribution information for the selected serving size.

### Contributions - 1.000 burrito

**Selected serving size.**

<table>
<thead>
<tr>
<th>Meal Pattern</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Milk Type:</td>
<td>-- SELECT --</td>
</tr>
<tr>
<td>Fruit Juice</td>
<td></td>
</tr>
<tr>
<td>Vegetable Juice</td>
<td></td>
</tr>
<tr>
<td>Grain Based Dessert</td>
<td></td>
</tr>
</tbody>
</table>

### Food Component | Contribution
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Fruits (cups)</td>
<td>Fruit</td>
</tr>
<tr>
<td>Fluid Milk (cups)</td>
<td>MILK-F</td>
</tr>
<tr>
<td>Meat/Meat Alternates (oz eq.)</td>
<td>Meat/MA</td>
</tr>
<tr>
<td>Grains (oz eq.)</td>
<td>WGR</td>
</tr>
<tr>
<td>Whole Grain-Rich</td>
<td>Non-WGR</td>
</tr>
<tr>
<td>Non Whole Grains-Rich</td>
<td>Non-WGR</td>
</tr>
<tr>
<td>Vegetables (cups)</td>
<td></td>
</tr>
<tr>
<td>Dark Green</td>
<td>Veg-DG</td>
</tr>
<tr>
<td>Red/Orange</td>
<td>Veg-RO</td>
</tr>
<tr>
<td>Beans/Peas (Legumes)</td>
<td>Veg-BP</td>
</tr>
<tr>
<td>Starchy</td>
<td>Veg-S</td>
</tr>
<tr>
<td>Other</td>
<td>Veg-O</td>
</tr>
</tbody>
</table>

### Available Menu Item Serving Sizes

<table>
<thead>
<tr>
<th>Serving Size</th>
<th>Portioning Tool</th>
<th>Is Default</th>
<th>Meal Contribution</th>
<th>Edit / Select Food Contributions</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.000 burrito</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.000 burrito</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Highlighted serving size (in blue).
To add “Food Component” contribution for other serving sizes:

6. Click on another serving size in the “Available Menu Item Serving Sizes” section to highlight the serving size. Notice that the highlighted serving size now displays after the word “Contributions” followed by a hyphen and the selected serving size.

7. Follow the steps previously listed in steps 2-5 to assign the “Food Component” contribution for other serving size(s).

8. After saving all “Food Component” information for the menu item serving sizes, scroll up to view the “Available Menu Item Serving Sizes” table. Notice that the “Meal Contribution” column now contains the “Meal Contribution” information for each serving size.

Note: This manual does not address the “Smart Snacks” section of the “Menu Item” tab. Use “Amigo” to help you enter “Smart Snacks” information and designate menu items as “Smart Snacks” items.
SEARCHING FOR MENU ITEMS

1. Click on the “Menu Planning” tab.

2. Click on the “Ingredients” folder.

3. Click on the “Menu Items” subfolder.

4. Enter or select search criteria for “Menu Items.”

   Note: See the “Quick Guide: Menu Item Search Criteria,” on the next page.

5. Click on the “Apply” button.

6. Select the “Menu Item” or “Recipe Code” hyperlink for the menu item that you want to use or edit.
### QUICK GUIDE: MENU ITEM SEARCH CRITERIA

**Menu Item:** Enter the name of the menu item. Users may enter part or the entire menu item name.

**Category:** Select a menu item “Category” to filter the search by menu item categories.

**Ingredient Code:** Enter the “Ingredient Code” to find a menu item associated with an ingredient with a specific code.

**Recipe Code:** Enter the “Recipe Code” to find a menu item associated with a recipe with a specific code.

**Smart Search:** Select “Smart Search” to find menu items that contain any part of the letter, sequence, or word(s).

**Include Discontinued Menu Items:** Select the “Include Discontinued Menu Items” box to include discontinued menu items in the search if necessary.

**Tags:** Enter “Tags” (keywords users add to recipes [or ingredients, menus, etc.]) to quickly find menu items tagged for a specific purpose.

**Apply:** Select “Apply” to search for a menu item based on the information entered and/or selected within the menu item search criteria.

**Reset:** Select “Reset” to clear all selections and information entered into the search criteria fields.
## Column Header | Data Type | Description
--- | --- | ---
**Category** | View only | Sortable; Lists the menu item category.

**Menu Item** | **Clickable link** | Sortable; Click to display *Menu Item* tab of the recipe that menu item is associated with.

**Recipe Code** | **Clickable link** | Sortable; Click to display *General* tab of the recipe that menu item is associated with.

**Ingredient Code** | View only | Sortable; Lists the ingredient code for single-ingredient recipes.

**Serving Size** | View only | Lists default serving size for the menu item.

**Meal Contributions** | View only | Lists all food components for the menu item.

**Allergens** | View only | Sortable; Lists all allergens associated with the menu item.

**Data Source** | View only | Sortable; Lists the data location (database) of the menu item.

### Menu Item List

<table>
<thead>
<tr>
<th>Category</th>
<th>Menu Item</th>
<th>Recipe Code</th>
<th>Ingredient Code</th>
<th>Serving Size</th>
<th>Meal Contribution</th>
<th>Allergens</th>
<th>Data Source</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fruit-TDA</td>
<td>Mandarin Fruit Cup</td>
<td>TR1000</td>
<td></td>
<td>1/2 Cup</td>
<td>1 Fruit</td>
<td></td>
<td>Local</td>
<td>Discontinue</td>
</tr>
<tr>
<td>Vegetable-TDA</td>
<td>Carrots, baby</td>
<td>TR1003</td>
<td></td>
<td>1 Cup</td>
<td>1/2 Veg-RQ 1/2 Vegetable-J</td>
<td></td>
<td>Local</td>
<td>Discontinue</td>
</tr>
<tr>
<td>Grain-TDA</td>
<td>Chocolate Chip Cookies</td>
<td>TR1007</td>
<td></td>
<td>2 cookie (2&quot; dia)</td>
<td>1/4 WGR 1/4 Grain-D</td>
<td>Contains Egg, Gluten, Milk, Soy, Wheat.</td>
<td>Local</td>
<td>Discontinue</td>
</tr>
<tr>
<td>Vegetable-TDA</td>
<td>Corn on the Cob</td>
<td>TR1010</td>
<td></td>
<td>1 Each</td>
<td>1/4 Veg-S 1/4 Vegetable-J</td>
<td></td>
<td>Local</td>
<td>Discontinue</td>
</tr>
<tr>
<td>Grain-TDA</td>
<td>Garlic Bread</td>
<td>TR1012</td>
<td></td>
<td>2 Each</td>
<td>1/4 WGR</td>
<td></td>
<td>Local</td>
<td>Discontinue</td>
</tr>
</tbody>
</table>
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Washington, D.C. 20250-9410;

(2) fax: (202) 690-7442; or

(3) email: program.intake@usda.gov.