

Onsite Monitoring Form | Seamless Summer Option (SSO) (Breakfast and Lunch)

Contracting Entity (CE) Name:

Date of Review:

CE ID Number:

Site Name:

	<u>YES</u>	<u>NO</u>
I. Counting and Claiming		
1. Is the count of reimbursable meals served taken at the point-of-service?	<input type="checkbox"/>	<input type="checkbox"/>
2. If the cashier or counter is at the beginning of the line, is a monitor stationed at the end of the line who removes from the count any meal which does not contain sufficient components in order to claim reimbursement?	<input type="checkbox"/>	<input type="checkbox"/>
3. Is there a system in place to ensure that second meals, with the exception of breakfast, are not claimed for reimbursement?	<input type="checkbox"/>	<input type="checkbox"/>
4. After viewing the point-of-service count in operation, does the point-of-service count method yield an accurate count of reimbursable meals?	<input type="checkbox"/>	<input type="checkbox"/>
5. If there is more than one serving line, are the counts from all lines properly consolidated?	<input type="checkbox"/>	<input type="checkbox"/>
6. Is there a trained substitute cashier/counter?	<input type="checkbox"/>	<input type="checkbox"/>
7. When preparing the monthly reimbursement claim, are the numbers of meals claimed for all sites reported correctly?	<input type="checkbox"/>	<input type="checkbox"/>
8. Was the onsite monitoring form completed and documented at least once during each site's operation?	<input type="checkbox"/>	<input type="checkbox"/>
II. Meal Service		
1. Do planned menus reflect the meal pattern requirements?	<input type="checkbox"/>	<input type="checkbox"/>
2. Is each of the required food components offered at every meal?	<input type="checkbox"/>	<input type="checkbox"/>
3. Are utensils that yield standard-sized servings used for portioning all menu items?	<input type="checkbox"/>	<input type="checkbox"/>
4. Are complete food production records maintained on all meals claimed for reimbursement, including breakfasts, snacks, lunches, and suppers?	<input type="checkbox"/>	<input type="checkbox"/>
5. Is site offering and claiming an appropriate number of meals based on type of site:		
a. Non-migrant or non-camp site—maximum of 2 meals each day, but not both lunch and supper	<input type="checkbox"/>	<input type="checkbox"/>
b. Migrant or camp site—maximum of 3 meals per day	<input type="checkbox"/>	<input type="checkbox"/>
6. Is each child permitted to select from the required type and number of choices of milk?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the site participate in the Noncongregate Feeding Demonstration Project?	<input type="checkbox"/>	<input type="checkbox"/>

	<u>YES</u>	<u>NO</u>
III. Program Operation		
1. Is the nondiscrimination statement and information about where a complaint may be filed included on program materials and posted for all to see?	<input type="checkbox"/>	<input type="checkbox"/>
2. Complaints	<input type="checkbox"/>	<input type="checkbox"/>
a. Are procedures established to receive complaints alleging discrimination?	<input type="checkbox"/>	<input type="checkbox"/>
b. Are complaints forwarded to the Texas Department of Agriculture?	<input type="checkbox"/>	<input type="checkbox"/>
3. Is there no separation by race, color, national origin, sex, age, or disability in the eating periods, seating arrangements, serving lines or eating areas?	<input type="checkbox"/>	<input type="checkbox"/>
4. Did the site conduct outreach to the media and community and grass roots organizations about feeding sites?	<input type="checkbox"/>	<input type="checkbox"/>
5. Are records maintained for a period of five years (public and charter schools) or three years (private schools and RCCIs) after the final claim for reimbursement for the fiscal year or until resolution of any audits or reviews?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the site have proper procedures to manage and safeguard cash (reconciliation, extra item sales, adult meals, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
IV. Results of Review		
1. Is corrective action plan required?	<input type="checkbox"/>	<input type="checkbox"/>
2. Is a follow-up review required?	<input type="checkbox"/>	<input type="checkbox"/>

Comments, Notes and Observations During the Review

V. Suggest Corrective Action (Follow-up within 45 days)?

VI. Signatures

Signature of Reviewer

Signature of Site Manager

Directions: Onsite Monitoring Form | Seamless Summer Option

Purpose

This form is intended to be used as an onsite monitoring instrument to ensure that CEs are correctly operating their counting and claiming systems.

Breakfast Review

Every school year, the CE must review 50 percent of their breakfast site's operation. For example, the CE will review 50 percent of the breakfast sites in SY 2020-21 and the other 50 percent of the breakfast sites in SY 2021-2022.

Lunch Review

Every school year, the CE must review 100 percent of their lunch sites at least once during each site's operation.

CE staff may find that conducting an onsite monitoring review more frequently than once per year will support preparation for an onsite administrative review by TDA and promote effective management.

The monitoring reviews should be conducted by the SSO site manager or her or his designee.

For additional guidance for the issues included in this form, see *Administrator's Reference Manual (ARM)*, Section 7, *Breakfast Meals*; Section 8, *Lunch Meals*; Section 9, *Pre-Kindergarten Meals*; Section 11, *Seamless Summer Option*; Section 16, *Financial System*; Section 20, *Counting and Claiming*; and Section 21, *Meal Service*.

Directions for Completing Form

- **Contracting Entity (CE) Name:** Record the name of the CE in the designated space.
- **CE ID Number:** Record the ID number of the CE in the designated space.
- **Date:** Record the date in the designated space.
- **Site:** Record the name of the site in the designated space.

Parts I - III

- Answer each question by marking the appropriate box under *Yes* or *No* and fill in any blank spaces as requested.
- Review the CE/site retained documentation related to each question topic area.
 - Is the documentation readily accessible?
 - Is the document kept in an organized manner?

Use of This Form	
Frequency	At least once annually during SSO operation for each site.
Required Form Format	Use this form or a similar reporting instrument.
Record Retention	<p>Completed forms kept onsite and made available on request.</p> <p>Public and charter schools are required to keep documentation related to school nutrition programs for 5 years.</p> <p>Private schools, other nonprofit organizations, and residential child care institutions (RCCIs) are required to keep documentation for 3 years.</p>

- Does the documentation support the answer?
- If not, what changes need to be made to ensure that the CE/site is implementing the program correctly?
- Compare results from the onsite monitoring form to previous scores.
- Develop strategies to address areas of need.

Part IV

- Determine if any of the answers to the questions in Parts I- III require a corrective action plan (CAP).
- Mark the appropriate response once that determination has been made.
- Record notes and observations about the corrective action in the comment text box.

Part V

- Determine if a follow-up review is needed to make sure the CAP has been completed successfully.
- Mark the appropriate response once that determination has been made.
- Record any comments, notes, or observations about the follow-up that will help to improve the school nutrition program in the comment text box.

Part VI

- Have the reviewer sign in the designated space.
- Have the site manager sign in the designated space.