

Section 2a

Meal Pattern Certification

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Update Guide

March 11, 2026

Fixed broken links.

May 19, 2023

Created new Definitions and Contact Information sections, located at the beginning of the Administrator's Reference Manual (ARM). Removed definitions and contact information from this section.

November 28, 2022

Updated Texas Administrative Code (TAC) appeals citation.

January 4, 2022

Updated *Section 2a, Meal Pattern Certification* to correct minor typos.

August 12, 2020

Updated *Administrator's Reference Manual (ARM), Section 2c, Meal Pattern Certification* to update *Administrator's Reference Manual (ARM)* section references.

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Meal Pattern Certification

This section is a supplement to *Administrator's Reference Manual (ARM), Section 2, Program Application & Agreement*. Developed by the United States Department of Agriculture (USDA), the meal pattern requirement certification specifications, are intended to accomplish two purposes:

1. Certify that CEs are demonstrating compliance with the National School Lunch Program (NSLP) and School Breakfast Program (SBP) meal pattern.
2. Provide a process for those CEs that demonstrate compliance with the new meal pattern to receive an additional performance-based reimbursement for lunch meals served.

All contracting entities (CEs) must be certified. New CEs will submit documentation when they apply to operate NSLP or SBP. TDA will monitor compliance with the NSLP and SBP meal pattern during the administrative review (AR) process.

Preparing for Certification Submission

The following guidance will assist CEs in preparing to submit documentation to become certified.

Texas Unified Nutrition Programs System (TX-UNPS)

All documentation for certification must be submitted to TDA through TX-UNPS using the Meal Pattern Compliance Dashboard. CEs are strongly encouraged to make all necessary updates to their Application Packet before submitting for certification.

TX-UNPS Information Used in Approving Certification

TDA will use the CE-provided information in TX-UNPS Meal Pattern Compliance Dashboard when reviewing the documentation submitted for certification including the following:

- Contact information, including but not limited to the name of the current superintendent, child nutrition director, and other authorized representative(s)
- Names and addresses for all schools operating under the CE
- Correct grades for each school
- Breakfast and lunch mealtimes
- Menu planning method for breakfast
- Availability of offer versus serve (OVS)

Any application-related correction that needs to be made after certification documentation has been submitted may be delayed until the certification review is completed.

Documentation Needed to Prepare for Certification Submission

CEs will find the following documents helpful in preparing documentation for certification submission:

- One week of menus for each menu type by age/grade group
- Production records, which include the portion sizes for each menu item for each menu type for each age/grade group¹
- Standardized recipes for all applicable menu items
- Nutrition Fact Labels and ingredients for all food items
- Child Nutrition (CN) Labels for menu or food items, as applicable
- Whole Grain Statements/Labels for each whole grain menu or food item, as applicable
- Product Analysis Sheet/Manufacturer’s Statement to Provide for a Grains Product, as applicable
- Product Analysis Sheet/Manufacturer’s Specification for Meat/Meat Alternate (M/MA) Products, as applicable
- *USDA Foods Fact Sheets* for all USDA Foods received
- *USDA Food Buying Guide for Child Nutrition Programs*

Documentation Required for Certification

To receive certification, a CE must submit three types of documents to TDA through the TX-UNPS Meal Pattern Compliance Dashboard. Review of documentation will not begin until TDA has received a complete set of required documents.

Recommendation: Prepare each document and create an electronic file for each one before attempting to upload documentation into TX-UNPS Meal Pattern Compliance Dashboard. When all required documents are ready, upload the entire set into the TX-UNPS Meal Pattern Compliance Dashboard.

1. **One Week of Menus (CE Form)**—CEs must submit one week of menus for each age/grade group and menu type for specific dates of meal service.

Submitted menu must be for served or planned to be served the month before submission, the month of submission, or the month after submission.

For new CEs, the date of submission of menus and the serving week may be extended beyond one month if the CE submits its program application documentation more than 30 days before beginning to serve meals.

For Example: If a new CE submits its application and certification materials in June of 2014, the menus submitted for certification may be the menus that will be served during September of 2014.

A menu will include the names of the entrees served as well as other menu items served with the entree.

To submit menus,

- Prepare a copy of the week’s menus for each age/grade group and menu type for specific dates of meal service using the format that is typically used by the CE.

¹ Sample food production records can be accessed at www.SquareMeals.org.

- Save or scan the file into a word document (.doc file) or .pdf file format.
 - Upload the file to the TX-UNPS Meal Pattern Compliance Dashboard. (See *Recommendation under Documentation Required for Certification* subsection in this section.)
2. **Certification Menu Worksheet *Spreadsheet (USDA Approved Form or Software)***—CEs must use the Excel *Certification Menu Worksheet (Worksheet)* developed by USDA or another USDA approved software tool²—to provide detailed information on the meals to be served under the new meal pattern This *Worksheet* has been designed to allow users to enter menus by day of the week and by the five required food components.

CEs will need the information contained in the documents collected in preparation for the certification process to complete the *Worksheet* or any of the tools using approved software.

Worksheet Navigation. The sheet tabs at the bottom of the *Worksheet* screen allow the user to access the following sheets:

- Instructions—Brief directions for completing the *Worksheet*
[NOTE: A more detailed set of directions for completing the *Worksheet* can be found at www.SquareMeals.org.]
- Week’s Menu—A series of text boxes and dropdown items that allow the CE to enter a descriptive list of all meals offered for that week
- Daily Menu—A series of text boxes and dropdown items that allow the CE to designate the menu items to be served day by day
- Option Veg Bar—A series of text boxes and dropdown items that allow the CE to designate menu items to be served on the vegetable bar by the week and day
- Notes Page—A text box that allows the CE to provide additional information required by TDA as well as other information the CE deems applicable to TDA’s approval of the *Worksheet*.
- Weekly Report—A tool within the *Worksheet* that allows the CE to view a report based on the menu items entered in comparison to the required components
- Simplified Nutrient Assessment—A tool to create a nutrient assessment for those CEs not using a nutrient analysis software

To submit the *Certification Menu Worksheet* spreadsheet,

- Download the *Worksheet* and directions from www.SquareMeals.org.
- Enter the food items and their portion sizes for one week of menus for each menu offered by age/grade group for both lunch and breakfast reimbursable meals, if applicable, into the worksheet.

² The worksheets used for meal pattern certification are located at www.SquareMeals.org. Approved USDA software forms can be found at <https://www.fns.usda.gov/tn/usda-approved-certification-compliance-tools-software>.

For Example: A CE creates four (4) Worksheet files:

- A total of three (3) lunch Worksheets files, one for each of the different age/grade groups: K–5, 6–8, and 9–12
- One (1) breakfast Worksheet file for age/grade group K–12

If a CE has multiple sites with the same age/grade group (i.e., three different high schools) and each site serves a different menu, the CE will need to create a separate Worksheet file for each of these sites.

- Save the document as an Excel file (*.xls file*).
- Upload the file to the TX-UNPS Meal Pattern Compliance Dashboard. (See *Recommendation under Documentation Required for Certification Step 3* below.)

[NOTE: If a CE is using the Simplified Nutrition Assessment incorporated into the *Worksheet*, the CE will wait to upload the *Worksheet* until after completing the Simplified Nutrient Assessment described in the Step 3 on this section.]

3. **Nutrient Analysis³ or Simplified Nutrient Assessment⁴**—CEs must provide nutrient information through one of two options: (1) the simplified nutrient assessment tool incorporated in the *Worksheet* or (2) a nutrient analysis (using a USDA approved software) for all planned meals:

To submit the menu nutrient information,

- Use the nutrition facts, product labels, and product manufacturing documents to provide nutrient information about the food items served on each menu.
- Choose one of the following options to provide nutrient information:

Option 1: Simplified Nutrient Assessment

CEs that choose to use this tool will not need to prepare a nutrient analysis. The *Simplified Nutrient Assessment* tool is incorporated within the *Worksheet* spreadsheet. Some of the food items, portions/serving amounts will prepopulate the *Simplified Nutrient Assessment* tool after completing menu entry. However, there are still questions that the CE must answer about each of the prepopulated entries. If CEs use Option 1, they will complete all sheets (tabs at the bottom of the page) in the worksheet.

- Use the *Simplified Nutrient Assessment* sheet tab at the bottom of Worksheet entry section to provide nutrient information.
- Answer all questions and provide additional information as required.
- Save the Worksheet as an *.xls file*. This single file will contain both the *Certification Menu Worksheet* and the *Simplified Nutrient Assessment* information.

³ Approved list of software available at <http://healthymeals.nal.usda.gov/menu-planning/nutrition-standards-school-meals>.

⁴ The Simplified Nutrient Assessment is considered a proxy for a complete nutrient analysis.

- Upload the file to the TX-UNPS Meal Pattern Compliance Dashboard. (See *Recommendation under Documentation Required for Certification* subsection in this section.)

Option 2: Nutrient Analysis

CEs that choose to use a USDA approved software to determine the nutrient content for their menus should use this option. However, CEs are not required to purchase nutrient analysis software. Any CE that does not have USDA approved software⁴ should use Option 1. CEs that choose Option 2 will not complete the *Simplified Nutrient Assessment* incorporated into the *Worksheet* (sheet tab at the bottom of the page).

- Submit a nutrient analysis of calories and saturated fat for each menu type by age/grade group for each day as well as the week using software approved by USDA for this purpose.
- Save (or scan) the nutrient analysis as a .doc file or .pdf file.
- Upload the file to the TX-UNPS Meal Pattern Compliance Dashboard. (See *Recommendation under Documentation Required for Certification* subsection in this section.)

Other Tools to Help with Certification

TDA has developed additional tools to assist CEs in preparing for certification. The following documents are located in the School Nutrition Programs Forms table at www.SquareMeals.org:

- *CE Resource Checklist: Preparing for Certification for Performance-Based Reimbursement*—A resource to assist the CEs applying for certification
- *Certification for Performance-Based Reimbursement Checklist Card*—An abbreviated checklist of documents and actions to take in getting ready for certification

Decision Timeline

TDA will respond within 60 days from the date of receipt of all required documentation to approve or deny certification.

Seamless Summer Option

CEs that are certified are eligible for performance-based reimbursement for meals served during their Seamless Summer Option beginning in the summer after their certification.

For Example: A CE that is certified during SY 2013–2014 will be eligible for performance-based reimbursement for meal served during its Seamless Summer Option program during the summer of 2014.

Compliance

The administrative review (AR) process includes monitoring of the implementation of the updated meal patterns and certification activities. If a CE is found to be out of compliance with the meal

pattern during an AR, TDA may stop the CE’s performance-based reimbursement off and/or recover previous payments made for performance-based reimbursement.

Appeal Rights

CEs may not appeal a decision to deny certification for performance-based reimbursement. However, a CE may appeal TDA’s decision to stop a CE’s performance-based reimbursement or to recover previous payment made for performance-based reimbursement.⁵

Records Retention

CEs must retain documentation related to certification. All documentation or records must be kept on file for a minimum of five years for public and charter schools or three years for private schools, nonprofit organizations, and residential child care institutions after the end of the fiscal year to which they pertain. If audit findings have not been resolved, the records must be maintained as long as required for the resolution of the issues raised by the audit. For more information on records retention, see the *Administrator’s Reference Manual (ARM)*, Section 30, *Records Retention*.

Information Box 1
Records Retention
Public and charter schools are required to keep documentation related to school nutrition programs for 5 years.
Private schools, nonprofit organizations, and residential child care institutions (RCCIs) are required to keep documentation for 3 years.

⁵ Appeal procedures are set out in 7 CFR 210.18(q) and Title 4, Part 1, Chapter 26, Subchapter E of the Texas Administrative Code.