TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

Administrative and Procurement Review Guide

School Year: 2026 - 2027

SFA Name:

CE ID:

Issue Date: August 14, 2026

Revised: 2026.08.04

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Note to School Food Authorities

This Guide will be utilized for information sharing between the Texas Department of Agriculture (TDA) and School Food Authorities (SFA) [also known as the Contracting Entity (CE)] having an Administrative Review (AR). This includes due dates for the SFA during the AR, required dietary and financial information, and additional instructions for the SFA.

If you have questions, please contact your assigned Compliance Review Monitor, Compliance Financial Review Monitor, or the regional Education Service Center for assistance.

Additional Resources can be found on the Squaremeals.org website/NSLP/Compliance, including a User Guide for accessing the AR and PR Form sets in TX-UNPS.

TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

Dear Program Partner:

Thank you for your commitment to administering federal nutrition programs. The complexities of managing these programs and the process of participating in administrative and procurement reviews require dedication and perseverance. Thank you to you and your team for your service to your community.

The Texas Department of Agriculture (TDA) is required to conduct administrative and procurement reviews to ensure that program operators comply with federal regulations. TDA is always looking for methods to improve the review processes and would appreciate your insight. Please help us improve the review experience by completing the customer service survey that is emailed during the entrance and exit conferences. This is an opportunity to communicate directly with TDA.

The review process often reveals new avenues for achieving excellence in all aspects of program operations. The results will help serve the Texans who depend on federal programs for access to good nutrition and who value the healthy lifestyles that they promote. I encourage you to use the reviews and the survey to strengthen our collaboration as we work together to build a healthier future in the Lone Star State.

Sincerely,

Lena Wilson

Lena Wilson
Assistant Commissioner
Food and Nutrition Division

Welcome to the Administrative Review Process

Thank you for partnering with the Texas Department of Agriculture (TDA) in ensuring Texas children have access to healthy meals!

Please use the links below to navigate to the resources page(s) on SquareMeals.org for the program(s) you operate. Review the updated policy documents and additional TDA resources to support your operations.

CHECK POLICY DOCUMENTS OFTEN, AS UPDATES ARE MADE CONTINUOUSLY.

Child and Adult Care Food Program: www.SquareMeals.org/CACFPResources
National School Lunch Program: www.SquareMeals.org/NSLPResources
Seamless Summer Option: www.SquareMeals.org/SummerResources
Summer Food Service Program: www.SquareMeals.org/SummerResources

For additional information contact your Education Service Center:
www.SquareMeals.org/ESC

TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

Food and Nutrition Division
Nutrition Assistance Programs

This product was funded by USDA.
This institution is an equal opportunity provider.

Updated 10/29/2020
www.SquareMeals.org

Bienvenidos al Proceso de Revisión Administrativa

¡Gracias por asociarse con el Departamento de Agricultura de Texas (TDA) para asegurar que los niños de Texas mantengan acceso a comidas saludables!

Por favor, use los enlaces ubicados más abajo para navegar la(s) página(s) de recursos en SquareMeals.org para el(los) programa(s) que operan. Revise los documentos actualizados sobre las políticas, y los recursos adicionales del TDA para apoyar sus operaciones.

REVISE A MENUDO LOS DOCUMENTOS SOBRE LAS POLÍTICAS, YA QUE SE HACEN ACTUALIZACIONES CONTINUAMENTE.

Child and Adult Care Food Program (Programa de Comidas para Niños y Adultos): www.SquareMeals.org/CACFPResources
National School Lunch Program (Programa Nacional de Almuerzos Escolares): www.SquareMeals.org/NSLPResources
Seamless Summer Option (Opción de Verano Constante): www.SquareMeals.org/SummerResources
Summer Food Service Program (Programa de Servicio de Alimentos de Verano): www.SquareMeals.org/SummerResources

Para obtener más información, comuníquese con su Centro de Servicios Educativos (ESC):
www.SquareMeals.org/ESC

DEPARTEMENTO DE AGRICULTURA DE TEXAS
COMISIONADO SID MILLER

Food and Nutrition Division
Nutrition Assistance Programs

Este producto fue financiado por USDA.
Esta institución es un proveedor que ofrece igualdad de oportunidades.

Actualizado 10/29/2020
www.SquareMeals.org

Administrative and Procurement Review SFA Checklist

SFA Name		CE ID
SFA Access to TXUNPS	**On-site Day of Review Date(s) (DOR)**	**Month of Review (MOR) (Review Period)**

Administrative Review Site Selection

☐	**School Breakfast Program (SBP)**	
☐	**National School Lunch Program (NSLP)**	
☐	**After School Care Program (ASCP)**	
☐	**Fresh Fruit and Vegetable Program (FFVP)**	
☐	**CACFP At-Risk (Snack/Supper)**	

Upload the following into Procurement Review Attachments

Procurement Review (Previous Fiscal Year) (completed off-site)	Reference Page(s)	Due Date
<u>FSMC ONLY:</u> Taher, Inc. **Base Year:** 24-25 FSMC Base year and previous year documents FSMC Renewal Documentation, if applicable	**14**	
FSMC ONLY: First 21-Day Menu Food Production Records ***<u>(LUNCH only)</u>*** with corresponding Meal Counting Edit Checks **Selected Sites:** All 4 Sites: Whitehurst Elem., **Base Year:** 24-25	**15**	
PR Initial Document Uploads: Complete Procurement Table, Upload Initial PR Documentation	**12**	8/25/26
Procurement Table Finalization Conference Call:	**13**	Look for email invite
PR Selected Samples: Procurement Vendor Sample Request Supporting Documents. *The SFA will receive an email sample request for specific vendor documents.	**14**	Due Date sent in email

Upload the following into Administrative Review Attachments

Section 700: Resource Management (Previous Fiscal Year) (completed off-site)	Reference Page(s)	Due Date
<u>Previous Fiscal School Year:</u> Resource Management Summary Form Required Supporting Documentation	**15**	
<u>Previous Fiscal School Year:</u> Resource Management Comprehensive Review Form(s) and Required Supporting Documentation	**15**	Due Date sent in email

Section	Off-site Administrative Review Form Questions:		Reference Page(s)	Due Date
100	Certification and Benefit Issuance	N/A	16	
200	Verification		17	
300	Meal Counting and Claiming		17	
800	Civil Rights		18	
900	On-site Monitoring		19	
1000	Local School Wellness Policy		19	
1100	Smart Snacks		19	
1200	Professional Standards		20	
1600	SBP and Summer Food Service Program (SFSP) Outreach		20	
2100	Special Provision Options		20	

Upload the following into Administrative Review Attachments

Section 100: Certification and Benefit Issuance		Reference Page(s)	Due Date
SFA-Wide Student Master Roster for Free and Reduced **AND/OR** Reduced Residential Child Care Institution (RCCI) Master List *The SFA is required to use the "Application Format in Excel" attachment	N/A	17	
SFA-Wide Student Master Roster for Denied/Paid **only**		17	
Free/Reduced Supporting Documentation from Selected Sample (RCCI Day Students, if applicable)		17	
Denied Supporting Documentation from Selected Sample (RCCI Day Students, if applicable)		17	

Section 200: Verification		Reference Page(s)	Due Date
List of Verified Applications: **Previous SY** ○ **Current SY** ◉	N/A	18	
Verification Sample Supporting Documentation		18	

Section 300: Meal Counting and Claiming *See Selected Sites and Programs on Page 1 of SFA Checklist*	Reference Page(s)	Due Date
Roster (Manual system or BIC), Detailed Transaction, Edit Check **Selected Date:**	17	
Month of Review Accuclaim(s) for all selected programs, sites and SFA-wide	17	

Section 400: Meal Components and Quantities *See Selected Sites and Programs on Page 1 of SFA Checklist*	Reference Page(s)	Due Date
Completed FPR for each site/program selected for review (NSLP and/or SBP) **Selected Week of FPRs:**	18	
Dietary Specs Form for Targeted Menu Site:	18	
Planned FPR for each site and program selected for review (NSLP, SBP) **DOR:**	18	

Section 1700: After School Care Program *See Selected Sites and Programs on Page 6*		Reference Page(s)	Due Date
Completed FPR for each site selected for review **Selected Dates:**		**20**	
Roster (Manual or Tally Sheets), Detailed Transaction report, and edit check for each site selected for review **Selected dates of meal counts:**		**20**	

Upload the following into At-Risk Review Attachments

At-Risk Supper Program		Reference Page(s)	Due Date
Completed FPRs and Planned DOR FPRs **Selected 5 previous days FPRs:**		**21**	
Roster (Manual system), Detailed Transaction Report, edit check **Selected 5 previous days meal counts:**		**21**	
Month of Review Accuclaim(s) for all sites individually and SFA-wide		**21**	

Required Review Documentation- Must be uploaded by DOR

Section 100: Certification and Benefits Issuance N/A

- Predetermined Notification Letter Template

Section 200: Verification N/A

- Verification Notification-Selection Letter for Households Template
- Verification Notification-Continuation of Benefits Letter Template
- Verification Notification-Verification Results/Adverse Action Letter Template
- Verification Information Request: Statement of Earnings/Social Security Income Template

Section 300: Meal Counting and Claiming

- DOR Roster (Manual system or BIC), Detailed Transaction Report, Edit Check

Section 400: Meal Components and Quantities

- Supporting Documentation for FPR(s) for the meals served during the MOR and DOR

Section 800: Civil Rights

- CN Staff Civil Rights Training – Sign-in Sheets and/or Certificates
- Complaint Procedures and Complaint Form
- Copy of Media Release, including required documentation to be published
- Documentation showing the Media Release was sent to the appropriate media outlets for publication

Section 900: On-site Monitoring **Previous SY** ◉ **Current SY** ○

- Breakfast and Lunch Completed On-site Monitoring Forms for all sites within the SFA
- ASCP and/or CACFP At-Risk On-site Monitoring Forms, if applicable

Section 1000: Local School Wellness Policy (LSWP)

- Board Approved LSWP and written implementation plan **(implementation plan is completed in addition to the local school wellness policy, 2 different documents)**
- LSWP Triennial Assessment

Section 1100: Smart Snacks

- A list of à la carte food and beverages sold on the school campus during the school day for all sites
- Smart Snack approval documentation and/or calculations

Required Review Documentation- Must be uploaded by DOR

Section 1200: Professional Standards

- List of all personnel who have child nutrition program duties. Include the name, job position, date of hire, and working status (full-time, part-time, temp., etc.)
- A copy of the Child Nutrition Director's job description
- Training logs, planned training, and supporting documentation for selected sample employees for program year 2026-2027, including CACFP At-Risk, if applicable

Section 1900: Fresh Fruit and Vegetable Program (FFVP), if applicable

- All invoices pertaining to the FFVP for the MOR
- FFVP Month of Review claim must be submitted prior to DOR

Additional: Equipment Grant, if applicable

- Invoices and purchase orders supporting the equipment purchased using the Equipment Grant
- All sites within a CE that were awarded equipment grant funds will be reviewed on-site

Required DOR Review Documentation

Section 300: Meal Counting and Claiming

- DOR Roster (Manual system or BIC), Detailed Transaction Report, Edit Check

Section 400: Meal Components and Quantities

- Completed DOR FPR(s) (all selected programs)

Section 1400: Food Safety

- Two most recent health inspections for the selected site(s) including CACFP At-Risk, if applicable
- SFA-wide and site level HACCP Plan(s), food safety procedures and temperature logs
- Buy American documentation to support exemptions

Compliance Review Monitor (CRM):	**Office Hours:**
Email:	**Contact Number:**
Compliance Financial Review Monitor:	**Office Hours:**
Email:	**Contact Number:**

Comments to SFA:

F

100-CBI-Certification, Benefits Issuance
200-VerificationSMC - Base Year 24-25; Taher, Inc.

Prior Findings:
23-24 - PR:
Micro - Equitable Distribution
Small - No specifications

23-24 AR:
800-Civil Rights
RMCR-Revenue from NonProgram

Administrative, Financial and Procurement Review Areas

The Administrative Review (AR) assesses the operation of the National School Lunch Program (NSLP), School Breakfast Program (SBP), and/or Seamless Summer Option (SSO) to ensure compliance with program regulations (7 CFR 210, 220, and 245). The AR is divided into two parts: Critical Areas of Review and General Areas of Review. The Critical Areas of the AR is divided into two parts: Performance Standard One and Performance Standard Two. In addition, the AR also contains the Resource Management (RM) review, also called the Financial Review and Procurement Review.

Critical Areas of Review

Performance Standard One (PS-1)

PS-1 verifies compliance with certification and eligibility, as well as meal counting and claiming. The reviewer will determine that each child was provided with the proper meal benefits, and that meals are properly counted and claimed for reimbursement, including any Special Provisions Options (SPO).

Certification and Benefit Issuance and Verification:

- Applications
- Rosters
- Categorical Eligibility (Direct Certification, Homeless, Migrant, Foster,
- Head Start, Early Head Start, Runaway)
- Verification documentation

Meal Counting and Claiming:

- The review focuses on the Point-of-Service System, Daily Record/Accuclaim Edit Check, and Reimbursement Claims.
- Meals claimed for reimbursement are served only to children eligible for free, Reduced price and paid lunches, breakfasts, and afterschool snacks.
- Meals are counted, recorded, consolidated, and reported through a system that consistently yields correct claims.

Performance Standard Two (PS-2)

PS-2 is compliance with meal components and quantities. The reviewer will determine that meals served to students are prepared, offered, and served according to the daily and weekly meal patterns requirements for the appropriate age/grade groups.

Meal Components and Quantities:

- Lunches claimed for reimbursement by the SFA contain food items/components as required by program regulations.
- Completed and accurate Food Production Records (FPRs), Child Nutrition (CN) Labels/Product Formulation Statement/Manufacturer's Specifications.

- Age/grade groups, meal pattern requirements, meeting minimum daily and weekly portions.
- Offer versus Serve.

Dietary Specifications:

Meeting minimum requirements for:

- Calories
- Saturated fat
- Trans fat
- Sodium
- Final Rule Requirements/Added sugars

Note: A Nutrient Analysis may be conducted, if necessary.

General Areas of Review

- Implementation of Free and Reduced-Price Policy Statement
- Public Announcement/Media Release
- Overt Identification
- Onsite Monitoring Responsibilities
- Proper Postings and Non-Discrimination Statements of Program Materials
- Complaint Policy
- Reporting and Record Keeping
- Local School Wellness Policy
- Food Safety/Health Inspections
- Civil Rights
- Equipment Grants
- Competitive Food (Smart Snacks)
- Professional Standards
- Water availability
- School Breakfast Program (SBP) and Summer Food Service Program (SFSP) Outreach

Other Federal Programs (Critical and General Areas)

- Fresh Fruit and Vegetable Program (FFVP)
- After School Care Program (ASCP)
- Seamless Summer Option (SSO)
- Special Milk Program (SMP)
- Child and Adult Care Food Program (CACFP) At-Risk

Note: Not all areas will apply to all School Food Authorities

Resource Management (Financial Review)

The Resource Management (RM) review is also called the Financial Review. The *Resource Management Summary (RMS)* assesses potential risks for the RM portion of the AR. The *RMS* must be completed and submitted at least **4 weeks** prior to the on-site review. If a risk is identified or if the *RMS* is not submitted by the due date, a Comprehensive Resource Management Review (CRMR) will be conducted. The Comprehensive Resource Management review may include one or more of the following areas:

- Maintenance of the Nonprofit School Food Service Account
- Paid Equity Lunch (PLE)
- Revenue from Nonprogram Foods
- Indirect Costs (IDC)

Procurement Review

The Procurement Review (PR) will determine how an SFA complies with the United States Department of Agriculture's (USDA) Food and Nutrition Service program procurement standards as outlined in 2 CFR 200 (OMB Uniform Guidance), as well as state and local procurement regulations.

The PR assesses the SFA's procurement procedures, solicitations, contracts, and supporting documentation to ensure compliance with USDA procurement regulations and guidance. The PR may focus on the following areas, if applicable:

- General Procurement Procedures and Code of Conduct
- Micro-Purchases
- Small Purchases
- Formal Contracts
- Non-competitive and sole source procurement
- Food Service Management Companies (FSMC)
- USDA Foods Reconciliation
- USDA Foods Processing Contracts
- Cooperatives

Note: Not all areas will apply to all School Food Authorities

The Procurement Review

Below is a list of initial PR documents that will be requested during the PR. Your reviewer will outline the needed items with due dates throughout the course of the PR. Additional documents may be requested**.**

Initial PR Documents (from previous fiscal school year)

- Written Code of Conduct
- Documented Procurement Procedures
- Detailed General Ledger
    - Information to be included: Account Fund Code/number, Account Description/Name, Transaction Description, Vendor Name, Vendor Number, Purchase Order Number, Invoice Date, Invoice Number, Amount, Check Number, Payment Date with Account Balances
- FSMC documentation, if applicable
- Processing contract documentation, if applicable
- Vendor Paid List (VPL) with Total Expenses per vendor paid from the non-profit school food services account in PDF, Excel, or CSV format

The purpose of the VPL is for the SFA to provide the TDA with a list of all vendors paid by the SFA during the previous fiscal school year. The list below provides some general examples of common goods and services purchased with child nutrition (CN) funds and should not be considered exhaustive. If the SFA has purchased an item not shown below, then the SFA must also include the vendor's name and the total amount paid to the vendor for the previous fiscal school year in the VPL provided to TDA.

Typical Costs to Include in the VPL (May include but not limited to the items below)

- Equipment as defined in Title 2 *CFR,* Section 200.33 (Computer, Kitchen, Office, Technology Systems)
- Materials and Supplies
    - Repairs, Rent or Leasing, Food, Processing, Cleaning supplies, Paper Goods, Disposables, Other Supplies as defined in 2 *CFR*, 200.94
- Vehicle Repairs if not performed by SFA staff
- Rentals-Computer software and hardware
- Nutrition education supplies
- Training (if not included in FSMC contract)
- Capital Improvements
- Building leases
- Co-op/group purchasing organizations dues memberships
- Credit Cards (List by individual vendors)
- Utilities (electricity, water, waste disposal)

Typical Costs to Exclude from the VPL

- In-house print shop
- Interagency agreements (e.g., agreement between two government agencies, I.E. Education Service Center and TDA Warehouses)
- Parent/student refunds
- State and local government costs, such as health inspection fee
- Mileage reimbursement
- Vehicle gas
- Travel and conferences
- Travel and conference reimbursements
- Petty cash payments
- Postage

NOTE: This list is not intended to be all-inclusive; your reviewer may have additional questions and request vendors to be added or removed from the VPL.

Procurement Table

- Complete the Procurement Table based on the VPL/summary of total expenditures by vendor (**nonprofit food service account only**).
- SFA will complete the PR table based on the procurement method, and **NOT** by procurement thresholds.
    - The Child Nutrition Director (CND) and Business Manager can work together to determine the correct placement of vendors based on the method in which the procurement occurred.
    - Formal Contracts require a contract number to be included in the comment box.

Procurement Supporting Documentation

Some documents have previously been requested from the CN cooperatives (Co-Op) and FSMCs (if applicable) and will not need to be uploaded. However, the SFA will still be expected to discuss all PR areas, and additional SFA-specific items will be requested, such as cost analysis, invoices, Interlocal agreements, and/or other supporting documentation. More specific information will be provided in a Vendor Sample request email prior to the PR supporting documentation due date.

Micro-purchases *(Vendor transactions selected for review)*
- Purchase orders issued
- Receipts/Invoices

Small Purchase Procurements (*Vendor transactions selected for review*)
- Solicitation documents (specifications, evaluation criteria, contract (if applicable))
- Bid Quotes/Responses
- Evaluation of Responses for Award
- Purchase orders
- Receipts/Invoices

Formal Procurements (*Documents for vendor contracts selected*)
- Solicitation documents (advertisement, specifications, evaluations (with supporting documentation), contracts, rejected bids (if applicable))
- Bidder/Offeror responses
- Evaluation of responses for contract award
- Executed contracts
- Contract renewal/addendum/amendments, if applicable (since original contract was awarded)
- Cost/price analysis documentation
- Non-competitive proposal authorization, if applicable
- Invoices (3 vendor invoices identifying goods/services procured and amounts paid)

8/25/26

FSMC – Base Year (*For State agencies reviewing the SFA-FSMC base year. The Solicitation and evaluation for FSMC(s) selected. The executed contract is on file at the State agency*)
- Solicitation contract terms and conditions
- Evaluation Documents/Scoring Sheets
- TDA Approval Letter
- Solicitation contract terms and conditions (advertisement, specifications, evaluation with supporting documentation, rejected bids)
- Bidder/Offeror responses

- Evaluation Documents/Scoring Sheets
- Notification to vendors of rejected bids/offers, if
- First 21-day (Lunch only) Menu(s), Food Production Records with corresponding Meal Counting Edit Checks (if not previously reviewed in procurement review)

FSMC – Renewal Year *(Reviews in renewal years, review executed renewal/amendments)*

- FSMC invoices for October and February of the previous school year and August of the current school year.
  - Including supporting documentation such as the district's revenue report,district edit check, and claim.
- Last two (2) completed FSMC Contract Management Form(s) (required biannually)
- USDA Foods Reconciliation (total for prior year)
- Advisory Board documentation (includes agenda and sign-in sheets)
- FSMC contract manager's name and contact information

Processing *(When SFAs include the procurement of processed end-products through a commercial food distributor directly).*

- Agreement/contract for processors
- SFA planned assistance level (from prior school year)
- SFA solicitation documents, vendor bids/responses, evaluations, and contracts
- Evaluation Documents/Scoring Sheets
- Contract renewals/addenda/amendments, if applicable
- Reconciliation of USDA Foods received
- K12 and/or Processor Link monthly reports, if applicable
- WBSCM processing reporting, if applicable

Supplemental Information *(Additional information related to procurement processes)*

- TX-UNPS application status (SFA and site)
- Self-certification approval for micro purchase thresholds, if applicable
- Cooperative memberships and Interlocal agreement, if applicable
- Documentation of any returned co-op fees, if applicable
- Any cooperative purchase for USDA processed commodities made by the SFA through a cooperative contract
- SFA method of USDA Foods reconciliation
- Financial charges from the previous school year (i.e., fund type, financial system)
- Process used by SFA to categorize purchases made from the non-profit school food service account
- Sole-Source vendors and supporting documentation

Section 700: Resource Management

Resource Management (RM) evaluates the overall financial health of an SFA's nonprofit school food service account. There are four areas of focus, including: maintenance of the non-profit school food service account, paid lunch equity, revenue from non-program foods, and indirect costs.

Please find the attached *Resource Management Summary (RMS)* form. This form is completed based on the previous fiscal school year. Some of the required supporting documents have been requested previously for the PR portion of the review and will not need to be uploaded. Once the form has been submitted, your reviewer will perform a risk analysis to determine if a comprehensive review is required for any or all of the four areas of focus for Resource Management.

Required RM Supporting Documents

- Chart of Accounts for Child Nutrition (CN) Fund Child Nutrition Program
- Detailed General Ledger for all CN Funds (PREVIOUS FISCAL YEAR)- Formatted in PDF and Excel
    - Information to be included: Account Fund Code/Number, Account Description/Name, Transaction Description, Vendor Name, Vendor Number, Purchase Order Number, Invoice Date, Invoice Number, Amount, Check Number, Payment Date with Account Balances
- Statement of Net Assets or Statement of Net Position (Balance Sheet)
- Statement of Activity or Revenues/Expenditures
- Vendor Paid List with Total Expenses per Vendor
    - The reviewer will access these documents in the PR review attachments
- Completed the current and previous year Paid Lunch Equity Tool (PLE), if applicable
- Completed the current and previous year Adult Meal Calculator for pricing and non-pricing SFAs

Resource Management Comprehensive Review (if applicable)

Based on a risk analysis conducted in the Resource Management Summary, the reviewer will send an email requesting the completion of one to four Resource Management Comprehensive Review forms.

Administrative Review Instructions by Section

Answer all questions in the AR review form set of TX-UNPS. If a question is not applicable, briefly explain why the question does not apply.

Using the instructions outlined in the TX-UNPS AR User Guide, upload the documents listed in the SFA Checklist into the Review Attachments section of TX-UNPS.

SNP Review
Review Forms

00000 Status: Active
SAMPLE CE ISD
DBA:
STREET ADDRESS
CITY, TX ZIP County District
Code: ESC:
TDA Region:

	Action	Form	Status
⊟		Off-site Assessment (10)	
⊟		SFA Forms (10)	
	View	100 - Certification and Benefit Issuance	
	View	200 - Verification	
	View	300 - Meal Counting and Claiming	
	View	800 - Civil Rights	
	View	900 - SFA On Site Monitoring	
	View	1000 - Local School Wellness Policy	
	View	1100 - Smart Snacks	
	View	1200 - Professional Standards	
	View	1600 - School Breakfast and SFSP Outreach	
	View	2100 - Special Provision Options	

100 Certification and Benefit Issuance (CBI)

N/A

Off-site Questions

- Standard Counting and Claiming (Free/Reduced/Paid) and Provision 2- Base Year
  - Answer questions based on current internal processes and procedures. Please provide specific details, including job titles of responsible parties and dates/timelines for certification and benefits of issuance processes.
- Community Eligibility Provision SFA-Wide, Provision 2- Non-base year, RCCI without day students - This form will be set to Not Applicable

Required Uploads-Initial CBI Documentation

- For Standard Counting and Claiming (Free/Reduced/Paid) or Provision 2- Base Year
  - Master roster for the entire district (not just for the sites selected) from the first operating day of the month of review (MOR)
    - Please use the attached *Application Format in Excel* workbook
      - There is a tab for free and reduced students
      - There is a second tab for denied/paid students
- For RCCIs
  - Upload a Master List documenting eligibility for students residing in the RCCI, showing:
    - Child's name, date of birth, personal income and frequency, child's entrance and exit date, and approving official's signature.

Required Uploads-Student Sample Documentation

- The reviewer will request a sample of free and reduced-price students, as well as denied students, by uploading a list in the Administrative Review Attachments. Please upload supporting documentation for all students selected in the sample.

- Household Application(s) (front and back)
- Verification of applications for any student(s) in the sample that were verified
- Categorically Eligible Lists (Direct Certification, Homeless, Migrant, Head Start/Early Head Start, Foster)
- Denied applications
- Copies of the notification letter notifying the household of denied benefits
- Copies of template notification letters notifying the households of their free and reduced-price eligibility status.

Uploads due by DOR

- Predetermined Notification Letter Template

200 Verification

N/A

Off-site Questions

- Standard Counting and Claiming (Free/Reduced-price/Paid) and Provision 2- Base Year
  - Answer questions based on current internal processes and procedures. Please provide specific details, including job titles of responsible parties and dates/timelines for verification processes.
- Community Eligibility Provision SFA-Wide, Provision 2- Non-base year, RCCI without day students
  - This form will be set to Not Applicable

Required Uploads-Initial Verification Documentation

- List of verified applications

Required Uploads-Verification Sample Documentation

- Verification Individual Household Report form(s) from verification sample
- Actual verification letter(s) sent to the household(s) in the verification sample

Uploads due by DOR

- Template letters:
  - Verification Notification-Selection Letter for Households
  - Verification Notification-Continuation of Benefits Letter
  - Verification Notification-Verification Results/Adverse Action Letter
  - Verification Information Request: Statement of Earnings/Social Security Income

300 Counting and Claiming

Off-site Questions

- For question 300, if SFA utilizes an electronic system and a paper system, indicate "combination system" in the drop-down selection.
- For questions 305a – 305m; describe process, responses cannot be N/A, briefly explain why the question does not apply.

Required Uploads- MOR Meal Counting and Claiming Sample Documentation

- Detailed transaction meal count report(s) AND/OR Roster(s) (manual system, BIC)
- Corresponding Edit Check(s) for reimbursable meals that include the following for each program (NSLP, SBP), for the date(s) and site(s) selected for review:
  - Date of Meal Service
  - Type of Meal Service
  - Student Name
  - Student Eligibility

Required Uploads- MOR Claim and Supporting Documentation

- SFA must submit the month of review (MOR) claim for reimbursement before the day of review (DOR)
- Reports that support the MOR TX-UNPS Claim(s) for SFA-wide (total) and all SFA sites.

400 Meal Components and Quantities

- There are no off-site questions to be answered.
- Update based on the food production integrity rule.
  - Please click the link below for more details on requirements for the on-site kitchen FPR SY 25-26 Food Production Record (FPR)

Required Uploads- MOR Food Production Record(s) (FPRs) Sample Week

- Completed Dietary Specifications Summary Form for the Targeted Menu School Site for both breakfast and lunch for the dates selected for the completed MOR FPR.
- Menus and completed FPR(s) for the dates selected for breakfast and lunch for each site(s) selected for review.
- Menus and planned DOR FPR(s) for breakfast and lunch for the site(s) selected for review.

Upload before DOR or available for review on-site

- Supporting Documentation for FPR(s) for the meals served during the MOR and DOR
  - CN Labels, Product Formulation statements, Nutrition Fact labels, Manufacturer's Specification Statements, recipes, and any other documentation to support crediting the FPR for the meals served during the Month of Review and Day of Review

800 Civil Rights

Off-site Questions

- Provide the current non-discrimination statement used for appropriate program materials at question 800.

Required Uploads- Civil Rights

- Copy of Media Release, including all required documentation to be published
- Documentation showing the Media Release was sent to the appropriate media outlets for publication

Uploads due by DOR

- CN Staff Civil Rights Training – Sign in Sheets and/or Certificates
- Complaint Procedures and Complaint Form

900 On-site Monitoring

Off-site Questions

- For SFAs with only 1 claiming site, On-site Monitoring is not required. This form will be set to Not Applicable in that instance.

Uploads due by DOR

- Breakfast and Lunch Completed On-site Monitoring Forms for all sites in the SFA
- ASCP On-site Monitoring Forms, if applicable
- CACFP At-Risk On-site Monitoring Forms, if applicable

1000 Local School Wellness Policy (LSWP)

Off-site Questions

- SFA can provide a link in the comment box of question OR upload the LSWP with written implementation plan, Triennial Assessment, and documentation of public notification to review attachments.

Uploads due by DOR- (website provided is acceptable)

- Board Approved LSWP with a written implementation plan
- LSWP Triennial Assessment

1100 Smart Snacks

Off-site Questions- applicable to all sites serving Smart Snacks

- SFA can list a la carte food and beverages sold at all sites during the school day in the comment box of the question **OR** upload a list in review attachments.

Upload before DOR or available for review on-site

- Smart Snack approval documentation and/or calculations

1200 Professional Standards

Off-site Questions

- Provide a current list of personnel by position who have child nutrition (NSLP/SBP, CACFP) duties that require professional standards hours. List should include:
    - Name, job position, date of hire, and working status (full time, part time, temp., etc.)
- The reviewer will request a copy of the Child Nutrition Director's job description
- The reviewer will select a sample and request documentation of the Director's hiring credentials (education & work history), completed and planned training for school nutrition staff. The SFA may provide documentation in an upload, listed in review questions, or provide it on-site.

Uploads due by DOR-

- Completed and planned training logs with supporting documentation for selected sample employees, including CACFP At-Risk, if applicable

1600 School Breakfast & SFSP Outreach

Off-site Questions

- Responses cannot be N/A, briefly explain if question(s) do not apply.

1700 After School Snack Program

- There are no off-site questions to be answered.

MOR FPR Dates

Required Uploads- MOR ASCP Documentation

- Detailed transaction meal count report(s) and corresponding Edit Check(s) for reimbursable meals that include the following for the date(s) and site(s) selected for review:
    - Date of Meal Service
    - Student Name

MOR Counting Dates

- Reports that support the MOR TX-UNPS Claim(s) for ASCP.
- Menus and completed FPR for the dates selected for each site(s) selected for review.

1900 Fresh Fruit and Vegetable Program (if applicable)

Upload before DOR or have available for review on-site on DOR

- There are no off-site questions to be answered.
- All invoices pertaining to the FFVP for the MOR
- FFVP Month of Review claim must be submitted before DOR

2100 Special Provision Options (if applicable)

Off-site Questions

- Answer questions 2100 – 2111 (not all questions are applicable).

Equipment Grant (if applicable)

- There are no off-site questions to be answered.
- Invoices and purchase orders supporting the equipment purchased using the Equipment Grant.
- All sites within an SFA that were awarded equipment grant funds will be reviewed on-site

CACFP At Risk (Snack/Supper) (if applicable)

- There are no off-site questions to be answered.

Required Uploads- MOR

- MOR reports that support **ALL** CACFP Claim(s) for all sites and SFA-wide.

At-Risk Counting Dates

Upload before DOR or available for review on-site on DOR

- Completed FPR(s) for the dates selected.
- Detailed transaction meal count report(s) and corresponding Edit Check(s) for reimbursable meals served on the date(s) and site(s) selected for review

At-Risk FPR Dates

- Supporting Documentation for FPR(s) for the meals served during the MOR and DOR
    - CN Labels, Product Formulation statements, Nutrition Fact labels, Manufacturer's Specification Statements, recipes, and any other documentation to support the FPR for the meals served during the requested period.

AR/PR Review Attachment Nomenclature Requirements

Instructions:

1. All documents that are uploaded to the AR and PR review attachment will need to have a description added in the Review Attachments Description Column.
2. Supporting documentation can be uploaded at either the paperclip next to each question or the Review Attachments.
3. If there is a nomenclature that has an option with a slash I.E. B/L, the SFA will select one or the other or can include both if the document contains both. For example, for MOR FPRs, if the SFA uploaded a separate file for Breakfast and lunch then there should be a two files labeled "400_MOR FPR_B_Example School" and "400_MOR FPR_L_Example School"

Procurement Review Attachments	SFA Upload
Code of Conduct	COC
Procurement Plan or Procedures	PP
Detailed General Ledger	GL
Vendor Paid List	VPL
Procurement Supporting Docs	Micro/Small/Formal_Invoice_Vendor_MMDDYY
Procurement Supporting Docs	Micro/Small/Formal_PO_Vendor_MMDDYY
Procurement Supporting Docs	Small/_Specs/Tech req._Vendor_MMDDYY
Procurement Supporting Docs	
Procurement Supporting Docs	
Procurement Supporting Docs	
Procurement Supporting Docs	
Procurement Supporting Docs	

Administrative Review Attachments	SFA Upload
Resource Management Summary Form	RMS
Detailed General Ledger	GL
Chart of Accounts	Chart of Accounts
Statement of Net Assets or Position/ Balance Sheet	Balance Sheet
Statement of Revenues/Expenditures	Rev-Exp
Adult Meal Calculator	Adult Meal Calc._XX-XX (year)
PLE Tool	PLE Tool_XX-XX (year)
Highlighted GL or supporting documentation for RMS Formulas	
RMCR - Maintenance of the Non-Profit School Food Service and supporting docs (if applicable)	RMCR_MNP SFA
RMCR - Revenue from Non Program Foods and supporting docs (If applicable)	RMCR_Non-pro Rev

RMCR - Paid Lunch Equity and supporting docs (If applicable)	RMCR_PLE
RMCR - Indirect Costs and supporting docs (If applicable)	RMCR_IDC
ENCR Spend Down Plan (if applicable)	ENCR Plan
Highlighted Non-Program Calculations and Support	
RMCR-Non-Program: Adult Prices - Supporting Documentation (POS Report)	Adult Price B/L YYYY
Announcement Letter	Announcement Letter
AR/PR Guide	AR/PR Guide – CE Name
CE Master Roster (F/R), Denied, and Verified Student List	100_Master Roster
CE Master Roster (F/R), Denied, and Verified Student List	100_Denied Roster
Student Sample(s) (Free/Reduced, Denied (if applicable)	
107: Application Approval/Denial Notification Letter	100_App. Notification Letter
110: Predetermined/Direct Certification Notification Letter	100_Predetermined Letter
Verifed Student List (if applicable)	200_Verified Student List
211: Verification Notification Letter	200_V. Notification Letter
212: Verification Individual Household Report Form	200_Household Report
213: Verification Adverse Action Letter	200_V. Adverse Action
316: MOR Edit check/ Accuclaim for all individual sites and consolidated CE	300_Accuclaim Edit check
316: MOR Edit check/ Accuclaim for all individual sites and consolidated CE	300_Accuclaim Edit check_site name/SFA-wide
322: MOR Meal Count(s)- Detailed Transaction Report	300_MOR Meal Count_site name
322: MOR Meal Count(s), rosters	300_MOR Roster_site name
322: MOR Meal Count(s) edit check for selected sites	300_MOR Edit check_site name
409 B&L/1706/At-Risk 412: Menu Evaluation Tool	400_MET_site name
MOR Completed FPR and Menu(s)	400_MOR FPR_B/L_site name
MOR Completed FPR and Menu(s)	400_MOR Menu_B/L_site name
MOR DOR FPR (Planned) and Menu(s)	400_DOR FPR_B/L_Planned_site name
MOR DOR FPR (Planned) and Menu(s)	400_DOR Menu_B/L_site name
801: Media Release and Proof of Publication	800_Media Release
801: Media Release and Proof of Publication	800_Proof of Publication
803: Civil Right Complaint Procedure	800_Compliant form
806: Civil Rights Training Documentation	800_Civil Rights Training
900: On-site Monitoring forms	900_On-site B/L_site name
1000: Local Wellness Policy AND Plan	1000_LWP_Policy
1000: Local Wellness Policy AND Plan	1000_LWP_Plan

1005: Triennial Assessment	1000_Triennial Assessment
1100: CE-wide Smart Snack List (if not typed in comment box)	1100_Smart Snack List
1200: CE Prof. Standards Training Logs (if not typed into comment boxes)	1200_Training Logs_staff/mgmt./FT/PT
1411: Buy American Documentation Uploaded	1400_Buy Amer. Doc_item name
320 B/L: DOR Edit Check(s)	300_DOR Edit check B/L_site name
402 B/L: DOR Complete FPR AND WOR FPR (if applicable) (risk based)	400_DOR FPR_B/L_Complete_site name
402 B/L: DOR Complete FPR AND WOR FPR (if applicable) (risk based)	400_WOR FPR_B/L_Complete_site name
Equipment Grant Q1: (supporting docs e.g. invoice, GL entry) (if applicable)	EQ_Invoice
Equipment Grant Q1: (supporting docs e.g. invoice, GL entry) (if applicable)	EQ_GL Entry

TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

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Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: https://www.usda.gov/sites/default/files/documents/ad-3027.pdf, from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

1. Mail:

U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410; or

2. Fax: (833) 256-1665 or (202) 690-7442; or

3. Email: program.intake@usda.gov.

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