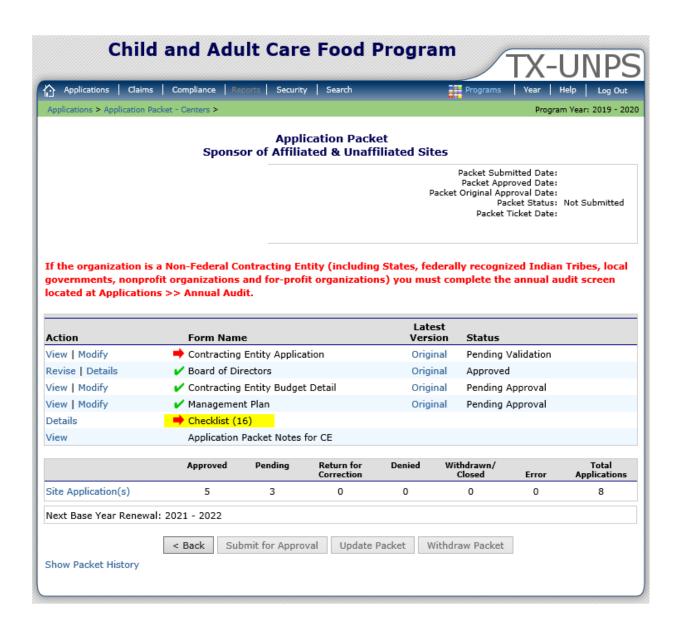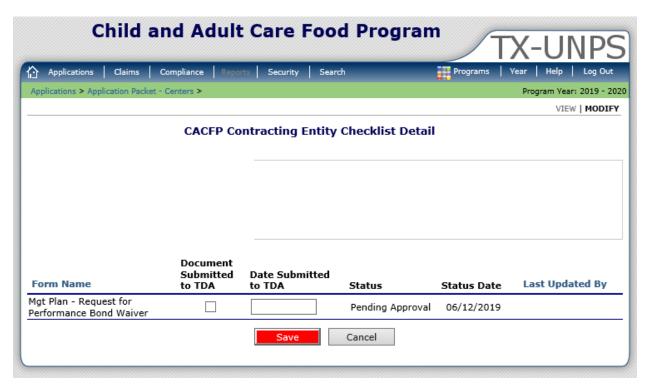The Checklist in the CACFP program year 2019 -2020 application packet has been updated to provide a more streamlined user experience.

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Application Packet
Sponsor of Affiliated & Unaffiliated Sites

Packet Submitted Date:
Packet Approved Date:
Packet Original Approval Date:
Packet Status: Not Submitted
Packet Ticket Date:

If the organization is a Non-Federal Contracting Entity (including States, federally recognized Indian Tribes, local governments, nonprofit organizations and for-profit organizations) you must complete the annual audit screen located at Applications >> Annual Audit.

Action	Form Name	Latest Version	Status
View	Modify	Contracting Entity Application	Original	Pending Validation
Revise	Details	Board of Directors	Original	Approved
View	Modify	Contracting Entity Budget Detail	Original	Pending Approval
View	Modify	Management Plan	Original	Pending Approval
Details	Checklist (16)		
View	Application Packet Notes for CE		

	Approved	Pending	Return for Correction	Denied	Withdrawn/ Closed	Error	Total Applications
Site Application(s)	5	3	0	0	0	0	8

Next Base Year Renewal: 2021 - 2022

< Back | Submit for Approval | Update Packet | Withdraw Packet

Show Packet History

The Contracting Entity Forms section behaves much the same way as before the update in that each form will need to be individually selected. This section will populate forms based on the data that is entered in the application packet. Please note that not all forms are applicable to the organization, but rather to the document that is completed in the application packet. For this example, the Management Plan was created and in response, the Checklist has populated with all forms related to the Management Plan and not necessarily related directly to the contracting entity organization.

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CACFP Checklist Summary

Contracting Entity Forms	Submitted?	Approved?
Mgt Plan - Request for Performance Bond Waiver	➡	➡
Mgt Plan - Policy and Procedures that assign CACFP and Civil Rights Responsibilities	➡	➡
Mgt Plan - Compensation Plan/policy - Additional information	➡	➡
Mgt Plan - Financial Written Procedures	➡	➡
Mgt Plan - Financial Statements or Performance Bond	➡	➡
Mgt Plan - Site Monitor Review Procedures	➡	➡
Mgt Plan - Sponsoring Organization's Outside Employment Policy	➡	➡
Mgt Plan - Recruitment Plan	➡	➡
Mgt Plan - Training Policy	➡	➡
Mgt Plan - Management Practices Written Procedures	➡	➡

Site Forms	Total Items	Submitted?	Approved?
At Risk: Documentation of Area Eligibility and Education/Enrichment Activities	3	➡	➡
License, Exemption or Other Documentation	3	➡	➡

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Once a form has been selected from the Contracting Entity Forms section, the check box "Document Submitted to TDA" may be selected, which will populate "Date Submitted to TDA" with the current date. Another option would be to enter a manual date of submittal under "Date Submitted to TDA." Once either selection has been made, the form must then be saved by selecting, "Save."
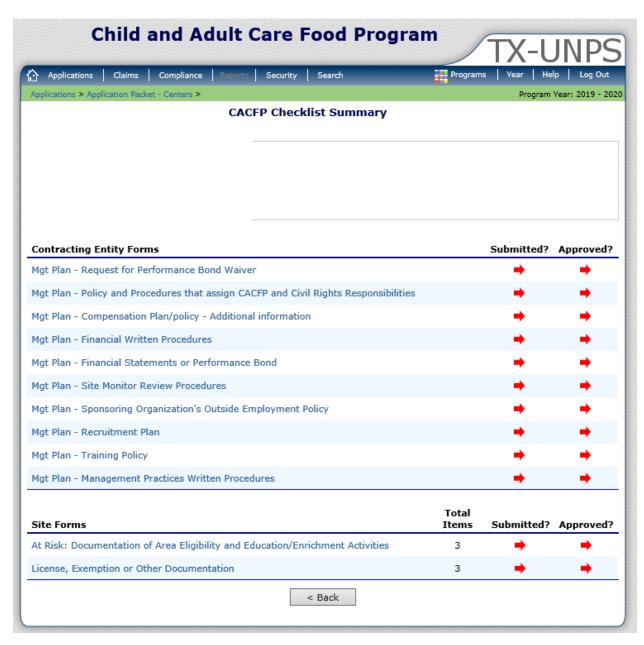
Once the form has been updated to reflect "Document Submitted to TDA" either by checking "Document Submitted to TDA" or by entering the date in "Date Submitted to TDA", select "Save" to finish. Once saved, the form in this example, "Mgt Plan – Request for Performance Bond Waiver", will now reflect "Submitted?" as noted by the green check mark.

Please note all items under the "Submitted?" column must reflect a green check mark before the Application Packet may be submitted for approval.

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CACFP Checklist Summary

Contracting Entity Forms	Submitted?	Approved?
Mgt Plan - Request for Performance Bond Waiver	✔	➡
Mgt Plan - Policy and Procedures that assign CACFP and Civil Rights Responsibilities	➡	➡
Mgt Plan - Compensation Plan/policy - Additional information	➡	➡
Mgt Plan - Financial Written Procedures	➡	➡
Mgt Plan - Financial Statements or Performance Bond	➡	➡
Mgt Plan - Site Monitor Review Procedures	➡	➡
Mgt Plan - Sponsoring Organization's Outside Employment Policy	➡	➡
Mgt Plan - Recruitment Plan	➡	➡
Mgt Plan - Training Policy	➡	➡
Mgt Plan - Management Practices Written Procedures	➡	➡

Site Forms	Total Items	Submitted?	Approved?
At Risk: Documentation of Area Eligibility and Education/Enrichment Activities	3	✔	➡
License, Exemption or Other Documentation	3	➡	➡

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The Site Forms section of the CACFP Checklist Summary will allow multiple sites to be selected by the individual form type selected. This section will populate the required forms based on the data and site type that is entered in the individual site applications. In this example, three At-Risk sites have been created and in response the system generated the required forms, "At-Risk: Documentation of Area Eligibility and Education/Enrichment Activities" and "License, Exemption or Other Documentation", for each of the three new sites.

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CACFP Checklist Summary

Contracting Entity Forms	Submitted?	Approved?
Mgt Plan - Request for Performance Bond Waiver	➡	➡
Mgt Plan - Policy and Procedures that assign CACFP and Civil Rights Responsibilities	➡	➡
Mgt Plan - Compensation Plan/policy - Additional information	➡	➡
Mgt Plan - Financial Written Procedures	➡	➡
Mgt Plan - Financial Statements or Performance Bond	➡	➡
Mgt Plan - Site Monitor Review Procedures	➡	➡
Mgt Plan - Sponsoring Organization's Outside Employment Policy	➡	➡
Mgt Plan - Recruitment Plan	➡	➡
Mgt Plan - Training Policy	➡	➡
Mgt Plan - Management Practices Written Procedures	➡	➡

Site Forms	Total Items	Submitted?	Approved?
At Risk: Documentation of Area Eligibility and Education/Enrichment Activities	3	➡	➡
License, Exemption or Other Documentation	3	➡	➡

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When selecting the form, "At Risk: Documentation of Area Eligibility and Education/Enrichment Activities", all sites that would require this form are listed.

Instead of individually selecting each one and entering a date submitted to TDA, "Select All" may be chosen which will populate the "Date Submitted to TDA." This allows the user to submit one form for multiple sites by checking only one box.

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Program Year: 2019 - 2020

VIEW | MODIFY

CACFP Contracting Entity Checklist Detail

At Risk: Documentation of Area Eligibility and Education/Enrichment Activities

Site Name	Site ID	Document Submitted to TDA	Date Submitted to TDA	Status	Status Date	Last Updated By
	Select All	✓				
Test Site 0111	0111	✓	06/12/2019	Pending Approval	06/12/2019	
Test Site 0222	0222	✓	06/12/2019	Pending Approval	06/12/2019	
Test Site 0333	0333	✓	06/12/2019	Pending Approval	06/12/2019	

Save   Cancel

The option to manually enter "Date Submitted to TDA" is still available should a form need to be submitted to TDA independently of the other forms for each of the sites.

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VIEW | **MODIFY**

CACFP Contracting Entity Checklist Detail

At Risk: Documentation of Area Eligibility and Education/Enrichment Activities

Site Name	Site ID	Document Submitted to TDA	Date Submitted to TDA	Status	Status Date	Last Updated By
		Select All ☐				
Test Site 0111	0111	☑	06/12/2019	Pending Approval	06/12/2019	
Test Site 0222	0222	☑	06/14/2019	Pending Approval	06/12/2019	
Test Site 0333	0333	☐		Pending Approval	06/12/2019	

Save   Cancel

Once all forms have been selected as "Document Submitted to TDA" either by checking "Select All", "Document Submitted to TDA" or by entering the date in "Date Submitted to TDA", select "Save" to finish. Once saved, the "At Risk: Documentation of Area Eligibility and Education/Enrichment Activities" will now reflect "Submitted?" as noted by the green check mark.

Please note all items under the "Submitted?" column must reflect a green check mark before the Application Packet may be submitted for approval.