



2016-17

School Nutrition Programs Checklist

Use this document to check off School Nutrition Program requirements as they are completed. Assign responsibilities to staff and document dates completed. Keep this checklist on file for reference.

Task	Deadline	Documentation	Date Completed	Who
Free and Reduced Benefits				
*Complete direct certification through the Direct Certification Application (DCA). Mail notice of direct certification to households.	Before school begins (ongoing)	Update Point of Sale system		
*Mail households free and reduced (F/R) applications if NOT directly certified.	Start of school year (ongoing)			
*Approve F/R applications. Mail approval/denial notice to households.	Ongoing	Keep applications		
*Change F/R students from the previous school year without a current application to paid status. Mail notification of change in eligibility .	30 school days after first day of school	Update Point of Sale system		
Qualify for Community Eligibility Provision if 40% enrolled students are directly certified.	April 1	DCA		
Professional Standards				
Complete Professional Standard training hours required for all food service staff.	Annually	Document training hours completed		
Attend a School Nutrition Programs Fall Workshop .	August/September	Keep certificate		
Food Service Directors: Attend the annual Montana School Nutrition Association Conference .	June	Keep certificate		
Verification (Does not apply to Provision/CEP schools)				
*Select households for verification. Find verification instructions here .	October 1	Use the verification activity tracker		
*Complete verification and verification report (FNS-742).	November 15	CNP Web		
Required Self-Reviews				
Self-Review: Meal Counting and Claiming System for both Breakfast and Lunch meal service at all sites.	February 1	Keep a copy		
If participating, conduct two After School Snack Program reviews.	First Four Weeks	Keep a copy		
	Before SY Ends			
Fresh Fruit and Vegetable Program (OPI invites districts to be a part of FFVP)				
If participating, use 1 st Quarter Fresh Fruit and Vegetable Program (FFVP) allocation.	September 30	Keep purchasing records		
If participating, use 2 nd , 3 rd and 4 th Quarter Fresh Fruit and Vegetable (FFVP) allocation.	June 30	Keep purchasing records		
If an invitation was sent to your district, sign up for Fresh Fruit and Vegetable Program .	May	Submit intent and/or addendum forms to OPI		

* Indicates requirements that may not apply to RCCIs/Provision 2/CEP schools.



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Annual Requirements				
Update Sponsor/Site Information .	September 30	CNP Web		
Complete production records .	Daily	Keep original records		
If breakfast is offered, complete breakfast outreach . Ex. Send menus home.	Start of school year (ongoing)	Keep a copy		
Submit public release to media.	Annually	Keep a copy; record date sent		
Request two sanitation inspections.	Annually	Record date of both inspections in CNP Web		
		Post inspection report in publically visible place		
Complete Civil Rights training with all school nutrition program staff.	Annually	Keep documentation form		
*Complete Paid Lunch Equity Tool to assess paid meal prices.	Annually	Keep electronic copy		
*Complete Non-Program Revenue Tool to ensure revenue from sale of non-program food generates at least the same proportion of revenue as they contribute to food cost.	Annually	Keep electronic copy		
Ensure all items sold during the school day meet Smart Snack regulations.	Ongoing	Keep documentation of all items sold during school		
Review and assess Wellness Policy .	Annually	Keep most recent copy		
Review and update HACCP plan . Have a copy at each school site where meals are served.	Annually	Keep a copy		
Conduct outreach for the nearest Summer Food Service Program site.	Annually	Keep a copy		
Submit USDA Foods order and signup for DOD Fresh in CNP Web .	Dec — Jan	Keep bills of lading		
*Develop and implement a district charging policy.	Annually	Keep a copy		
Develop and implement a district procurement policy.	Annually	Keep a copy of procurement documentation		
Other				
Private Schools: Submit Annual Financial Report	June	CNP Web		

* Indicates requirements that may not apply to RCCIs/Provision 2/CEP schools.

All documentation for the items listed must be kept on file for three years plus the current year.

Reminder: Claims for reimbursement are due on the 10th of each month; except months with less than 10 operating days. If a month has less than 10 operating days, combine the month with another (i.e., combine August and September on the September claim and combine May and June on the May claim).