

Annual Requirements for USDA Child Nutrition Programs

To ensure program compliance please distribute a copy of this calendar to each staff person responsible for completing the following tasks related to the National School Lunch Program (NSLP) and School Breakfast Program (SBP) operation. All required program related materials must be retained by the School Food Authority (SFA) for three (3) years plus the current year of operation for audit compliance.

Requirement	Due Date	Initials	Date Completed
USDA Child Nutrition Program Online Contract Update/renew the USDA Child Nutrition Program contract with DPI (http://dpi.wi.gov/school-nutrition/national-school-lunch-program/banking-contracts-claims-reports). The contract must be updated for each school year. The “end date” for programs submitted on the contract must include summer school dates, if any. Actual approval of contracts will not begin until after the DPI system roll-over in July. The contract manual is located at http://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/contract-manual.pdf .	By June 19		
Community Eligibility Provision (CEP) () N/A To begin participation in CEP, the CEP application, worksheet, and agreement are due to DPI August 31. Once approved, it is only necessary to reapply once every four (4) years. For currently participating CEP sites, the Intent to Participate form is required annually. This form is provided to participating schools and notifies the SNT of whether you will continue in CEP or if you would like to make any modifications to the claiming percentage or participating schools. Additional information and forms can be accessed at http://dpi.wi.gov/school-nutrition/national-school-lunch-program/community-eligibility .	By August 31 for school year 2015-2016 By June 30		
Food Service Management Company, Vended Meals, or Joint Agreements (if applicable) Submit new Food Service Management Company, vended meals, or joint agreement contracts (including any applicable renewals) to DPI. DPI must approve the agreements before the online contract can be approved. Mail or fax the completed and signed agreement to DPI for review and approval. Template Food Service Management Company, vended meals, and joint agreements must be used and can be found on the DPI website (http://dpi.wi.gov/school-nutrition/procurement). For vended meals agreements, a copy of vendor’s current restaurant license must also be submitted to DPI. When entering into a Food Service Management Company agreement, select one of the two required Request for Proposals located at http://dpi.wi.gov/school-nutrition/procurement . The process requires DPI approval at multiple steps and can take on average three (3) months to complete. Contact Vic Taugher (victor.taugher@dpi.wi.gov , 608-266-5514) or Deb Wollin (debra.wollin@dpi.wi.gov , 608-267-3724) for additional information and approval.	Must be received before online contract can be approved		
Paid Lunch Equity Tool () N/A for RCCIs, P2, CEP, and non-pricing schools Complete the Paid Lunch Equity (PLE) tool for the upcoming school year. The PLE tool must be completed prior to setting lunch prices for the upcoming school year. Maintain an electronic and printed copy of the completed PLE tool at the SFA. The previous year’s tool will be used to complete the current PLE tool. Additional resources can be accessed at http://dpi.wi.gov/school-nutrition/national-school-lunch-program/financial .	In the spring and/or near the end of the school year, when lunch prices are being determined for the upcoming school year. Upload the tool into the online school nutrition contract.		

Annual Requirements for USDA Child Nutrition Programs (Continued)

Requirement	Due Date	Initials	Date Completed
Free and Reduced Price Meal Application Print current applications for free and reduced price meals/free milk from DPI's website. Distribute between July 1 and the beginning of the school year to <u>ALL</u> households (unless certified through Direct Certification prior to distributing applications). The Free and Reduced Price Meal application packet includes an updated prototype application, parent notification letter, notice of direct certification letter, and other related forms and can be found at http://dpi.wi.gov/school-nutrition/national-school-lunch-program/free-reduced-applications . Process completed applications within ten (10) operating days after the date of receipt. Send notification to households with students who are eligible for free or reduced price meals and to households that are denied benefits. File all approved and denied applications at the SFA, along with any other documentation supporting eligibility of benefits. For use of web-based applications, please contact DPI to verify approval, and then proceed with the process of notifying households of availability per the Eligibility Manual for School Meals (http://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/eligibility-manual-for-school-meals-july-2015.pdf).	After July 1		
Direct Certification (DC) Run DC for the first time and maintain the original matched list(s) for your files. Send notification to households of students that are categorically eligible for free meals. Prototype DC letters are included each year in the current Free and Reduced Price Meal application packet (http://dpi.wi.gov/school-nutrition/national-school-lunch-program/free-reduced-applications). SFAs are required to run DC a minimum of three times per school year, once at the beginning of the school year, three months after first run, and six months after first run, per USDA SP 31-2011. The third DC run needs to include the total student enrollment for purposes of determining CEP eligibility. SFAs can choose to run DC more frequently. The matching database is updated weekly. Maintain all original DC match lists at the SFA. DC resources can be accessed at http://dpi.wi.gov/school-nutrition/direct-certification .	<i>First Run:</i> at or near beginning of school year (July – August)		
	<i>Second Run:</i> Three months after initial effort (October – December)		
	<i>Third Run:</i> Six months after initial effort (January – March)		
Benefit Issuance List From benefit documentation, (which includes Free and Reduced Price Meal applications, DC lists, documentation designating students as homeless by the public school district's homeless liaison, documentation designating students as migrant by migrant coordinator, and any additional documentation for foster or runaway students), create/maintain a benefit issuance list noting the student's name, benefit status, date of qualification, benefit type/source (i.e., DC or application). Remember, carryover benefits from the prior school year are in effect for the first 30 operating days of school or until new benefit documentation is received. Information on carryover benefits can be found in the Eligibility Manual for School Meals (http://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/eligibility-manual-for-school-meals-july-2015.pdf). An example benefit issuance list can be found at http://dpi.wi.gov/files/school-nutrition/pdf/beniss_ex.pdf .	Prior to start of school year <i>Updates should be made throughout the year as new benefit documentation is received or as new students arrive</i>		

Annual Requirements for USDA Child Nutrition Programs (Continued)

Requirement	Due Date	Initials	Date Completed
Public Release Send the public release for free and reduced price meals/free milk to local media and grassroots organizations that reach minority or under-represented groups. Public releases are available in English (http://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/nslp-public-release-1516.docx) and Spanish (http://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/nslp-public-release-spanish-1516.docx). SFAs are required to send the public release to local media and community grassroots organization but are not required to pay to have it published. File a copy of materials sent and list of who sent to at the SFA.	Prior to start of school year		
Food Safety Plan Conduct annual review of school-level food safety plan(s) and include any necessary updates. Recommend scheduling staff and volunteer training on food safety. Food safety resources can be accessed at http://dpi.wi.gov/school-nutrition/food-safety .	Prior to start of school year		
And Justice for All Poster Post an <i>And Justice for All</i> poster in a publicly visible and readable area where the program is administered. If new or additional posters are needed, please contact the DPI SNT at 608-267-9228.	Prior to start of school year		
Food Service Annual Financial Report Complete and submit the Food Service Annual Financial Report for the prior fiscal year, July 1 – June 30 (http://dpi.wi.gov/school-nutrition/national-school-lunch-program/banking-contracts-claims-reports). The October lunch claim cannot be entered online until the Food Service Annual Financial Report is submitted.	By August 31		
Wisconsin School Day Milk Program Claim () N/A Submit the Wisconsin School Day Milk Program (WSDMP) claim to DPI for the prior school year (http://dpi.wi.gov/school-nutrition/national-school-lunch-program/banking-contracts-claims-reports). The October lunch claim cannot be entered online until the WSDMP claim is submitted. Additional resources can be accessed at http://dpi.wi.gov/school-nutrition/milk-programs/wisconsin-school-day-milk .	By August 31		
Elderly Nutrition Program Claim () N/A Submit the Elderly Nutrition (EN) Program claim to DPI for the prior school year (http://dpi.wi.gov/school-nutrition/national-school-lunch-program/banking-contracts-claims-reports). The October lunch claim cannot be entered online until the EN claim is submitted.	By August 31		
Afterschool Snack Program () N/A Complete Afterschool Snack Program On-site Monitoring form and keep on file at the SFA. Additional resources can be accessed at http://dpi.wi.gov/school-nutrition/after-school .	Two reviews each school year (First review within first four weeks of snack service)		
Civil Rights Training Complete the annual Civil Rights Training for staff involved with USDA Child Nutrition Programs. The prototype training is updated yearly and available at http://dpi.wi.gov/school-nutrition/national-school-lunch-program/civil-rights , along with an attendance log. Maintain a copy of the training and attendance log at the SFA.	Around the beginning of the school year		

Annual Requirements for USDA Child Nutrition Programs (Continued)

Requirement	Due Date	Initials	Date Completed
Verification - start verification process <ul style="list-style-type: none"> Verifying Official determines how many free and reduced price meal applications were APPROVED on or before October 1 (carryover applications should not be included), calculates how many free and reduced price meal applications need to be verified and selects verification sample from the pool of applications that were APPROVED on or before October 1. Confirming Official conducts confirmation review on the free and reduced price meal applications that were selected for verification – signs and dates the bottom of the application. Determining Official sends letters to households selected for verification (“We must check your application” letter – print from DPI’s website). Additional resources can be accessed at http://dpi.wi.gov/school-nutrition/national-school-lunch-program/counting-claiming/verification .	On or after October 1		
Verification – review verification materials <ul style="list-style-type: none"> Review documents submitted by households selected for verification and follow-up with households that did not respond to verification request. Send letter to households selected for verification to let them know the results (“We have checked your application” letter – print from DPI’s website). Submission of Verification Collection Report (VCR) is recommended following conclusion of verification activities, with a due date of February 1. Additional resources can be accessed at http://dpi.wi.gov/school-nutrition/national-school-lunch-program/counting-claiming/verification .	Between October 1 and November 15		
Verification – update benefits Make any necessary benefit changes as a result of verification.	Upon completion of verification		
Civil Rights Compliance Self-Evaluation Complete the Civil Rights Compliance Self-Evaluation form and keep on file at the SFA. The Civil Rights Compliance Self-Evaluation Form can be accessed at http://dpi.wi.gov/files/forms/doc/f1441.doc .	By October 31		
FNS-10 Report The FNS-10 report includes enrollment data and the number of approved free and reduced students as of the last day lunch was served in October. The October lunch claim cannot be entered online until FNS-10 data is submitted to DPI (http://dpi.wi.gov/school-nutrition/national-school-lunch-program/banking-contracts-claims-reports).	Portal opens November 1. October claim for reimbursement cannot be submitted until the report is complete.		
Paid Lunch Price Report Submit the Paid Lunch Price Report to DPI (http://dpi.wi.gov/school-nutrition/national-school-lunch-program/banking-contracts-claims-reports). The Paid Lunch Price Report includes the most frequently charged student lunch price for each grade level category (elementary, middle/junior high school, high school). <i>Submission of this report is required even if non-pricing.</i>	Portal opens November 1. Report is due November 15. Please note, the October claim for reimbursement cannot be submitted until the report is complete.		

Annual Requirements for USDA Child Nutrition Programs (Continued)

Requirement	Due Date	Initials	Date Completed
Verification Collection Report The report can be submitted any time between November 1 and February 1 (http://dpi.wi.gov/school-nutrition/national-school-lunch-program/counting-claiming/verification). All SFAs will be blocked from online claiming after this date, meaning claims cannot be entered online or paid, until the report is submitted. Please note, the verification process is required to be completed by November 15. Verification materials and results should be filed at the SFA.	By February 1		
On-site Monitoring Form () N/A Complete On-site Monitoring Form and keep on file at school (ONLY for schools that have more than one location where meals are served). This is required only if there is more than one school /meal service site in the SFA as designated on the online contract with DPI. Complete monitoring visits and document results, including any follow up, for all sites by February 1 annually. Download the template on-site monitoring documentation form posted at http://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/onsite_monitoring_2015.doc .	By February 1		
Professional Standards Complete and log appropriate number of required training hours for all school food service personnel. For more information go to http://dpi.wi.gov/school-nutrition/training/professional-standards .	By June 30		
Local Wellness Policy (LWP) All SFAs must establish and implement a LWP. Assessment and evaluation of this policy is also required. More information on the LWP can be found at http://dpi.wi.gov/school-nutrition/wellness-policy .	Recommended to review annually and assess, at a minimum, tri-annually		

Daily and Monthly Requirements for USDA Child Nutrition Programs

Requirement	Due Date
Complete daily menu production records. Production records are required by USDA but in no required standardized format. Production records should document what is prepared and served for each meal program (daily production plans, standardized recipes, Child Nutrition Labels or Product Formulation Statements). Maintain production records at SFA for three (3) years plus the current school year. Production record templates can be accessed at http://dpi.wi.gov/school-nutrition/national-school-lunch-program/menu-planning .	Complete daily
Complete and review Daily Participation Edit Check prior to submission of claim for reimbursement. Obtain daily meal counts for each school listed on Schedule A of the online contract. If using an automated accountability system, this process may be built in to it. Maintain the monthly edit checks from each school at the SFA. A manual edit check form can be accessed at http://www.dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/editcheck.doc .	Completed daily, review monthly
Submit monthly claim for reimbursement to DPI via Online Services. Claims for reimbursement cannot be submitted during the claim month of operation. The only exception is the June claim, which can be submitted after the last meal service in June. Please refer to the claiming calendar below for submission deadlines. Schools blocked from submitting claims electronically should submit the claim on paper before the monthly deadline (see chart below). Fax or e-mail claim copy to Jacqueline Jordee before the deadline at 608-267-9207 or jacqueline.jordee@dpi.wi.gov.	Monthly

60 Calendar Day Cut-off Deadlines for Submitting Claims for Reimbursement

Claims for reimbursement for meals/milk served under the NSLP, SBP, Afterschool Snacks, and Special Milk Program (SMP) must be submitted to DPI on-line for payment **within 60 calendar days after the end of the claiming period**. Only one claim per program is accepted per payment processing period. Processing occurs each Tuesday morning, unless that day is a holiday, in which case the processing would happen the following day. Payment processing does not occur the last two weeks of June and the last two weeks of December so that DPI's Business Office can do fiscal- and year-end closeouts.

Claiming Month	Last Day for Receipt/Postmark of Claim
January	April 1 (March 31 on leap years)
February	April 29
March	May 30
April	June 29
May	July 30
June	August 29
July	September 29
August	October 30
September	November 29
October	December 30
November	January 29
December	March 1 (February 29 on leap years)

Child Nutrition Reports

Child Nutrition Reports are available online at <http://dpi.wi.gov/school-nutrition/national-school-lunch-program/banking-contracts-claims-reports>.

USDA Foods Distribution Program

Information	Due Date	Submit to DPI/File at SFA
Annual USDA Foods Order Survey (order USDA Foods for the entire upcoming school year)	Late winter (Exact dates provided to all School Food Authorities in mailing from DPI USDA Foods Team)	Submit to DPI annually via http://www3.dpi.wi.gov/fdpprod/login.aspx
USDA Foods Fair Share/Bonus Surplus Order	Offered monthly, pending availability	Submit to DPI monthly via online services
USDA Foods Invoice for Total Fees Due <u>Fees deducted from</u> monthly reimbursement claims	Available monthly online	File at SFA

USDA Nondiscrimination Statement

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA.

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To file a program complaint of discrimination, complete the [USDA Program Discrimination Complaint Form](#), (AD-3027) found online at: http://www.ascr.usda.gov/complaint_filing_cust.html, and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter 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;
- (2) fax: (202) 690-7442; or
- (3) email: program.intake@usda.gov.

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At a Glance...USDA Child Nutrition Programs Requirements for School Year 2015-2016

Annual Requirements	Due Date	Initials	Date
USDA Child Nutrition Program Online Contract	By June 19		
Community Eligibility Provision (CEP) () N/A	By June 30 for currently participating programs By August 31 for new CEP programs.		
Food Service Management Company, Vended Meals, or Joint Agreements (if applicable)	Must be received before online contract can be approved		
Paid Lunch Equity Tool *only for CEP Mixed Districts at the non-CEP sites, CEP data should be omitted from the weighted average.	In the spring and/or near the end of the school year, when lunch prices are being determined for the upcoming school year. Upload into the online school nutrition program contract and submit by June 19.		
Free and Reduced Price Meal Applications	After July 1		
Direct Certification	At or near beginning of school year (July – September)		
Benefit Issuance List	Prior to start of school year and as needed throughout as new documentation is received		
Public Release	Prior to start of school year		
Food Safety Plan	Prior to start of school year		
And Justice for All Poster	Prior to start of school year		
Foodservice Annual Financial Report	By August 31		
Wisconsin School Day Milk Program Claim () N/A	By August 31		
Elderly Nutrition Program Claim () N/A	By August 31		
Afterschool Snack Program () N/A	Two reviews each school year with first review in first 4 weeks		
Civil Rights Training	Around the beginning of the school year		
Verification - start verification process	On or after October 1		
Verification – review verification materials	Between October 1 and November 15		
Verification – update benefits per verification outcome(s)	Upon completion of verification		
Civil Rights Compliance Self-Evaluation	By October 31		
Direct Certification	3 months after initial effort (October – December)		
FNS-10 Report	November 1		
Paid Lunch Price Report	November 1		
Verification Collection Report	By February 1		
On-site Monitoring Form () N/A	By February 1		
Direct Certification	6 months after initial effort (January – March)		
Professional Standards	By June 30		
Wellness Policy	Recommended annually		

Daily and Monthly Requirement	Due Date
Daily production records	Complete daily
Daily Participation Edit Check	Completed daily, review monthly
Submit monthly claim for reimbursement	Monthly

Wisconsin DPI Child Nutrition Program
<http://dpi.wi.gov/school-nutrition>

Online Services
<http://dpi.wi.gov/nutrition/online-services>

School Nutrition Team Personnel Directory
<http://dpi.wi.gov/school-nutrition/directory>