

Guidance Memorandum 5A: CACFP Sponsoring Organization Requirements

CACFP Training Checklist for Sponsoring Organizations

Use this checklist to:

- Assure all key staff receives initial and annual training on the required CACFP topics
- Utilize DPI resources available to meet the CACFP training requirements
- Document topics reviewed and resources used to complete the required training

Recommendations on which key staff should be trained on each topic are listed next to the title of each topic.

Instructions:

- Mark all that apply or are covered during the training
- Include this document along with a completed *CACFP Training Agenda* with your CACFP Training records that are retained on file.

CACFP Webcasts <http://dpi.wi.gov/community-nutrition/cacfp/training/webcasts-adc>

Webcasts provide instruction on many CACFP operational and administrative requirements. Viewing these webcasts can help meet the requirements for training Sponsoring Organization staff.

CACFP Guidance Memorandums (GM)

<http://dpi.wi.gov/community-nutrition/cacfp/adult-care/memos>

The CACFP GMs provide instructions, resources, and forms to use for meeting the CACFP requirements and go hand-in-hand with the CACFP webcasts. Agencies must meet the requirements specified in the GMs to be in compliance with the CACFP.

1. Civil Rights

Key Staff: All Staff

- Review *CACFP Civil Rights Training PowerPoint or Handout* (under GM 8A)

2. Reimbursement System

Key Staff: CACFP staff who compiles and submits claims, financial staff

- Review Guidance Memorandum 2 – *CACFP Reimbursement; USDA Rates of Reimbursement*

Key points:

- Identify the current Federal reimbursement rates, including Cash-in-Lieu of USDA Foods
- Understand the claiming percentage method to determine the amount of reimbursement

3. CACFP Meal Patterns

Key Staff: Food preparers, staff who are present at meal time, plan menus, complete production records, help serve meals, and/or review menus to verify meals meet the meal pattern, monitors

- Review meal pattern GM 12A: *CACFP Meal Pattern for Adult Participants*
- Watch webcast *CACFP Meal Pattern and Service Requirements for the Adult Care Component*
- Review meal service method requirements (GM 12A, Section D)
- Review special dietary needs requirements (GM 12A, Section F)
 - Review *Medical Statement Flow Chart* (under GM 12A)
 - Review *Claiming Meals with Special Dietary Needs Flow Chart* (under GM 12A)

Key points:

- Understand required meal/snack components (breakfast, snack, lunch/supper)
- Understand minimum required serving sizes
- Understand serving requirements for the meal service method followed (pre-plated, family-style dining, or cafeteria-style)
- Understand documentation and serving requirements for various special dietary needs

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4. Time of Service (TOS) Meal Counts

Key Staff: Staff responsible for completing TOS meal counts or staff who supervise those who complete TOS meal counts, staff who compile claims, monitors)

- Refer to 4B – *Recordkeeping Requirements* within this checklist for training on eligible and ineligible adult participants.

- Review GM 9A – *CACFP Recordkeeping Requirements*, section III *Meal Count Records*
- Watch webcast: *Recording and Maintaining Meal Counts for the Adult Care Component*

Key points:

- Only eligible adult participants who are served fully compliant meals must be recorded at the time of service in order to claim their meals for CACFP reimbursement
- Do not record before a meal/snack based on the number of eligible adults *expected* to eat
- Do not record meal counts based on attendance or from attendance records (rosters)

Use the meal count form most appropriate for your center to record TOS meal counts:

- Centers having all or mostly eligible adult participants enrolled in its adult day services:
 - Use the *Meal Count Form* for recording the total number of only eligible participants under the correct meal or snack column for the correct day
 - Do not record ineligible adults or staff within the TOS meal counts
 - Double-check the adults recorded on the meal count sheet to be sure that only eligible adult participants served fully compliant meals are marked within the meal count
- Centers providing services to both eligible and ineligible adults
 - Use *Greater Than Three Meals Record* for recording the TOS meal counts by participant name
 - List eligible participants by first and last name and write dates on the 'Week of' line
 - Mark an "X" under the correct meal for the correct day; leave blank if eligible participant is not present and/or not seated at table and provided all required components

5. Recordkeeping Requirements

A. Menus/Production Records

Key Staff: Staff who plan menus and complete production records, monitors

- Review GM 12A CACFP Meal Pattern Requirements for Adults, section titled *Commercially Prepared Combination Food Items* and section titled *Required Documentation for Meals and Snacks*
- Review the *Instructions for Completing the Daily Production Record* listed under GM 12A on the guidance memo website
- Review the *Child Nutrition (CN) Requirement Information Sheet* listed under GM 12A
- Watch webcast: *Completing Production Records*

Key Points:

- Maintain daily, dated menus for each approved meal service, including all food substitutions
- List all meal components on production records, include total amounts prepared; use prototype *Production Record* form (PI-1488-A) or other approved form (GM12A)
- Indicate "HM" for homemade combination dishes and "CN" for foods that are CN-labeled

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B. Enrollment and Income Eligibility Information

Key Staff: CACFP Administrative staff, monitors, staff recording meal counts at TOS

- Review Guidance Memo 6A - CACFP *Enrollment Requirements*
- Review Guidance Memo 1A - *Household Size-Income Statements (HSIS)*

Watch Webcasts:

- Eligibility and Participation Requirements for the Adult Care Component*
- Household Size-Income Statements (HSIS)*
- Maintaining the Household Size-Income Record (HSIR) for the Adult Care Component*

Key Points:

- Adults attending adult day services who reside in nursing homes, community based living facilities (CBRFs), or adult family homes (AFH) are not eligible to participate in the CACFP.
- Required enrollment documentation (individual plans of care) on file for all participants
- Valid HSIS on file for each eligible adult participant claimed as free/reduced
- A eligible adult participant's determined income eligibility is recorded on (HSIR)
- Eligible adult participants without a valid HSIS, or those over the income eligibility, are marked as non-need on the HSIR

C. Attendance

Key Staff: Teachers and other staff who maintain attendance records, monitors

- Maintain accurate attendance records by assuring accurate sign in/out times

D. Income and Expense Records

Key Staff: Staff with financial recordkeeping responsibilities

- Watch webcast: *Quarterly Financial Reports - Sponsoring Organizations*
- Review Guidance Memo 11 - *CACFP Financial Management Requirements*

6. Claim Submission

Key Staff: CACFP staff who compiles and submits claims

- Watch two (2) webcasts: *Completing the CACFP Claim* and *CACFP Internet Claim Procedures*
- Review Guidance Memo 3A - *CACFP Claim Submission and Processing*, including Section D - *Meal Count Edit Checks*

7. Review Procedures

Key Staff: All staff with CACFP responsibilities

- Train staff on how monitors will be reviewing sites (3x/year, announced or unannounced, during a meal service) and that all CACFP records (i.e. meal counts) must be available to the monitor
- DPI, USDA and other State and Federal officials have the ability to make announced or unannounced reviews of Program activities during normal hours of operation and all CACFP records (i.e. meal counts) must be available to these officials

MONITORS: In addition to applicable topics above, Review Guidance Memorandum 5A & understand:

- Site review requirements (time frame, announced/unannounced, meal observation, identifying serious deficiencies and imminent threat to health or safety)
- How to complete the *CACFP Site Pre-operational Form* and *CACFP Site Review Form*