

Requirements for USDA Child Nutrition Programs for 2023-24

National School Lunch Program (NSLP): Schools Participating in the Community Eligibility Provision (CEP)

Instructions: To ensure program compliance, please distribute a copy of this calendar to each staff person responsible for completing the tasks listed below. Retain documentation for three (3) years plus the current year of operation for audit compliance. If audit findings have not been resolved, records must be retained beyond the three-year period as long as required for the resolution of the issues raised by the audit.

Additional record retention rules apply for CEP school. Retain records used to develop the Identified Student Percentage (ISP) during the entire period CEP is in effect, including all extensions, plus three fiscal years after the submission of the last claim for reimbursement which was based on the data. This retention requirement pertains to all records for the initial CEP election year showing numbers of identified and enrolled students, and all records from any updates made to the ISP.

Requirements at a Glance

Requirement	SFA Exemption	Due Date	Initials	Date of Completion
Daily Production Records	Required	Daily		
Review Participation Records	Required	Daily		
Verify Reimbursable Meal Signage is Up to Date	Required	Daily		
Conduct Direct Certification (In addition to four required full-enrollment runs.)	() N/A	Weekly (best practice) or Monthly <i>(recommended, not required)</i>		
Complete the monthly edit check prior to submitting the reimbursement claim.	Required	Monthly		
USDA Foods Inventory Management and Monitoring	() N/A	Monthly		
Review USDA Foods Invoices for Fees	() N/A	Monthly		
Crediting Documentation	Required	Ongoing		
Smart Snacks Documentation	Required	Ongoing		
Update Buy American Non-compliant List	Required	Ongoing		
Local Wellness Policy Annual Review	() N/A	Annually <i>(recommended, not required)</i>		
Local Wellness Policy Public Notification	Required	Annually		
Local Wellness Policy Triennial Assessment	() N/A	Once every three years Year of Prior Triennial Assessment:		
Enter the USDA Child Nutrition Program Online Contract for the upcoming school year (After contract rollover every spring)	Required	June 9, 2023		

Complete Vended Meals or Joint Agreements	() N/A	June 9, 2023		
Food Service Management Company Procurement (Begin at least three months before due)	() N/A	June 9, 2023		
Paid Lunch Equity Tool (Most SFAs exempt for 2023-24)	() N/A	June 9, 2023		
April 2023 Reimbursement Claim Due (Submit after May 1)	Required	June 29, 2023		
CEP Application or Annual Intent Form	Required	June 30, 2023		
Summer Food Service Program (SFSP) Outreach	Required	Prior to the end of the school year		
Professional Standards Tracker for the 2022-23 school year (Start tracking training after July 1, 2022)	Required	June 30, 2023		
Nonprogram Food Revenue Tool	() N/A	June 30, 2023 (Suggested)		
May 2023 Reimbursement Claim Due (Submit after June 1)	Required	July 30, 2023		
June 2023 Reimbursement Claim Due (Submit after the last day of school in June)	Required	August 29, 2023		
Annual Financial Report (After the last day of service in the 2022-23 school year)	Required	August 31, 2023		
Wisconsin School Day Milk Program Claim (Submit after the last day of service in June)	() N/A	August 31, 2023		
Elderly Nutrition Program Claim (Submit after the last day of service in June)	() N/A	August 31, 2023		
Direct Certification: Full Enrollment Run (After July 1)	Required	Before the first day of school		
Distribute Alternate Household Income Forms or Free and Reduced-Price Meal Applications (After July 1)	Required	Before the first day of school and when requested or a new student enrolls		
CEP Letter to Households	Required	Before the first day of school		
Unpaid Meal Charge Policy (mixed districts only)	() N/A	Before the first day of school		
Public Release	Required	Before the first day of school		
Site-specific Food Safety Plan	Required	Before the first day of school		
And Justice for All Poster	Required	Before the first day of school		
Civil Rights Training	Required	Before the first day of school and when new staff begin their employment		
Special Provision Match	Required	On or before the last operating day of October		
Begin Onsite Monitoring for All Lunch Sites and 50% of Breakfast Sites <i>Only SFAs with one site are exempt.</i>	() N/A	February 1, 2024		
Afterschool Snack Program Onsite Monitoring (First Visit)	() N/A	Within the first four weeks of snack service. Date Completed:		

July 2023 Reimbursement Claim Due (Submit after August 1)	Required	September 29, 2023		
Verification - (mixed districts only)	() N/A	Completed by November 15, 2023		
August 2023 Reimbursement Claim Due (May be submitted on or after 9/1)	Required	October 30, 2023		
Civil Rights Compliance Self-Evaluation (PI-1441)	Required	October 31, 2023		
FNS-10 Report	Required	November 1, 2023		
Paid Lunch Price Report (FNS-828)	Required	November 1, 2023		
September 2023 Reimbursement Claim Due (May be submitted on or after 10/1)	Required	November 29, 2023		
October 2023 Reimbursement Claim Due (May be submitted on or after 11/1)	Required	December 30, 2023		
November 2023 Reimbursement Claim Due (Submit on or after December 1)	Required	January 29, 2024		
Verification Collection Report (VCR/FNS-742)	Required	February 1, 2024		
Onsite Monitoring Completed for All Lunch and 50% of Breakfast Sites. <i>Only SFAs with one site are exempt.</i>	() N/A	February 1, 2024		
USDA Foods Annual Order Survey	() N/A	February-March 2024 (Dates TBD)		
December 2023 Reimbursement Claim Due (Submit on or after January 1)	Required	February 29, 2024		
Afterschool Snack Program Onsite Monitoring (Second Visit)	() N/A	Date Due:		
Direct Certification: Full Enrollment Run Required for DPI Reporting (On or after March 15)	Required	April 1, 2024		
Verify contract end dates and contact information in the Online Contract are correct before contract rollover for the 2024-25 school year.	Required	Mid-April, Date TBD		
January 2024 Reimbursement Claim Due (May be submitted on or after February 1)	Required	March 31, 2024		
USDA Foods Delivery Arrangements	() N/A	March 31, 2024		
February 2024 Reimbursement Claim Due (May be submitted on or after March 1)	Required	May 30, 2024		
March 2024 Reimbursement Claim Due (May be submitted on or after April 1)	Required	May 30, 2024		
April 2024 Reimbursement Claim Due (May be submitted on or after May 1)	Required	June 29, 2024		
Professional Standards Tracker for the 2023-24 school year (After July 1, 2023, and throughout the school year)	Required	June 30, 2024		
May 2024 Reimbursement Claim Due (Submit on or after June 1)	Required	July 30, 2024		
June 2024 Reimbursement Claim Due (Submit on or after the last day serving in June)	() N/A	August 29, 2024		

Yearly Requirements	Due Date	Initials	Date Completed
<p>USDA Child Nutrition Program Online Contract</p> <p>Update/renew the USDA Child Nutrition Program Contract with DPI. The contract must be updated/renewed before each school year. The school year is defined as July 1 – June 30. https://dpi.wi.gov/school-nutrition/program-requirements/contracts</p> <p>Approval of contracts will not begin until after the DPI system roll-over in July. For assistance with contract renewal and specific dates, please reference the Contract Manual. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/online-contract-manual.pdf</p>	<p>June 9, 2023</p>		
<p>Community Eligibility Provision (CEP) Forms</p> <p>For current CEP sites, the Annual Intent Form is required. This form notifies the SNT if the school food authority (SFA) will continue in CEP or will modify the claiming percentage or participating schools.</p> <p>SFAs that need to reapply for CEP after the end of the four (4) year cycle must submit a new CEP application by June 30, 2023. The CEP application consists of the Agreement Form and Eligibility Worksheet. https://dpi.wi.gov/school-nutrition/community-eligibility-provision</p>	<p>June 30, 2023 () N/A</p>		
<p>Food Service Management Company Contract</p> <p>Before entering into a Food Service Management Company contract, SFAs must use a Request for Proposal (RFP) DPI Template. The RFP process requires DPI approval at multiple steps and takes an average of three months to complete. Submit new Food Service Management Company (FSMC) contract, including any applicable renewals, to DPI by emailing the completed FSMC dpifsmc@dpi.wi.gov. https://dpi.wi.gov/school-nutrition/procurement/required-template-agreements/fsmc</p>	<p>June 9, 2023 () N/A</p>		
<p>Vended Meal, Joint, or Alternate SFA Agreements</p> <p>Signed Vended Meal, Joint, or Alternate SFA Agreements are uploaded into the upcoming school year’s Child Nutrition Program Online Contract. DPI approves agreements before the online contract is approved.</p> <p>The DPI Templates for Vended Meals Agreement or Joint Agreement is required and must be uploaded in its entirety. https://dpi.wi.gov/school-nutrition/procurement/required-template-agreements</p> <p>For Vended Meals Agreements only, a copy of vendor’s current restaurant license must be submitted to DPI with the signed agreement in one PDF file.</p> <p>For SFAs that have a site operating under an Alternate SFA Agreement, this agreement must be renewed annually and uploaded, in its entirety, as part of the school nutrition contract. https://dpi.wi.gov/school-nutrition/alternate-sfa-agreement</p>	<p>June 9, 2023 () N/A</p>		

<p>Paid Lunch Equity Tool (PLE)</p> <p>SFAs participating in CEP SFA-wide:</p> <ul style="list-style-type: none"> Exempt from PLE requirements. <p>SFAs with some CEP schools and some non-CEP schools (i.e. mixed districts):</p> <ul style="list-style-type: none"> The PLE Tool is required to be completed annually to determine paid meal prices. More information and the PLE Tool are located on the Financial Management website. https://dpi.wi.gov/school-nutrition/program-requirements/financial-management For SY 2023-24: Per USDA Memorandum SP 11-2023, if your SFA had a zero or positive balance in the Nonprofit School Food Service Account (Fund 50) as of June 30, 2022, you do not need to complete the PLE tool. The ending fund balance is pulled from the SY 2021-22 Child Nutrition Report, which can be viewed on Online Services. https://dpi.wi.gov/nutrition/online-services 	<p>June 9, 2023</p> <p>() N/A</p>		
<p>Food Service Annual Financial Report (AFR)</p> <p>Complete and submit the Food Service Annual Financial Report for the prior fiscal year (July 1, 2022 – June 30, 2023). Ensure all revenues and expenses are broken out by program and expense category. https://dpi.wi.gov/school-nutrition/program-requirements/reporting</p>	<p>Portal opens the first week in July.</p> <p>Due August 31, 2023</p>		
<p>Public Release</p> <p>Send the current year’s public release for free and reduced price meals/free milk to local media and grassroots organizations that reach minority or under-represented groups. SFAs are required to send the public release to local media but are not required to pay to have it published. SFAs should also send the release to major employers contemplating or experiencing large layoffs and local unemployment offices, as applicable. At the SFA, maintain a copy of the materials sent and a list of to whom the materials were sent.</p> <p>A Public Release for SFAs Operating CEP SFA-Wide is available. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/cep-public-release.docx</p> <p>A Public Release for SFAs Operating as a Mixed District with CEP is available. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/cep-mixed-district-public-release.doc</p>	<p>After July 1, but prior to the first day of school</p>		

Alternative Household Income Form and USDA Free and Reduced Price Meal Application

CEP removes the need to distribute and collect USDA Free and Reduced-Price Meal applications to determine meal benefit eligibility. However, the need for individual student level income information is still necessary to collect from students at CEP schools for other programs (e.g., Title 1, SAGE/AGR, and Wisconsin School Day Milk Program). The SFA has two options to collect this information:

For CEP SFA-wide, use [DPI Alternate Household Income Form](https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/alternate-household-income-form.pdf): This form was developed to identify economically disadvantaged students who are not already on the Direct Certification list. <https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/alternate-household-income-form.pdf>

For reporting purposes, DPI still requires that CEP schools and districts identify in their student information system those students that are economically disadvantaged. This subgroup consists of students eligible for free or reduced-price meals based on direct certification or submission of an Alternative Household Income Form. The list of economically disadvantaged students should be maintained separately from the USDA meal programs. For additional information on economically disadvantaged status, visit the [DPI WISE webpage](https://dpi.wi.gov/wise/data-elements/econ-status). <https://dpi.wi.gov/wise/data-elements/econ-status>

For Mixed Districts, use USDA Free and Reduced-Price Meal Application: Recommended for SFAs with some CEP schools and some non-CEP schools (i.e. mixed districts) to use one single form to collect household income information.

Mixed districts must compile and maintain a benefit issuance list noting the student's name, benefit status, date of determination, and benefit determination source (i.e., DC or application).

For detailed information regarding collecting and processing school meal applications and maintaining a benefit issuance list, please refer to the corresponding sections in the [General Calendar of Requirements](https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/calendar-of-requirements-general.pdf). <https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/calendar-of-requirements-general.pdf>

Note: SFAs must fund the distribution, collection, and processing of the CEP student-level income data separately from the non-profit school food service account. Food service staff may continue to help with this process, but only if funded outside of the non-profit school food service account.

**After July 1 and
before the first day of
school.**

<p>Direct Certification (DC)</p> <p>For CEP SFA-wide, conduct DC runs at least twice per year for the Special Provision Match in October, and on or before April 1. As needed, conduct additional DC runs to obtain April 1 data supporting an increase in ISP or a recalculation due to a significant change in participating schools. Maintain all original DC match lists at the SFA as paper copies or electronically. Additional Direct Certification information can be found online. https://dpi.wi.gov/school-nutrition/program-requirements/direct-certification</p> <p>For Mixed Districts, conduct a full-enrollment DC run at least three times per school year. Store the original student match file securely, in paper or electronic format, for three years plus the current school year. In addition to the three minimum DC runs required by USDA, a full-enrollment DC must be completed on or before April 1 to reflect enrollment information on April 1. This data is compiled for a USDA report and is used to determine which schools qualify for CEP. https://dpi.wi.gov/school-nutrition/program-requirements/direct-certification</p> <p>Send notification letters to households categorically eligible for free or reduced-price meals. Prototype DC letters are available. https://dpi.wi.gov/school-nutrition/program-requirements/direct-certification#:~:text=and%20DC%20webcast-,Resources,-Eligibility%20Manual</p> <p>SFAs are strongly encouraged to run DC more frequently and when new students enroll. Running DC more often than required reduces the amount of time SFA staff spend processing applications and reduces the number of unpaid meals charges by ensuring all eligible students receive the benefit they are entitled to promptly.</p> <p>Best Practice: Conduct a full enrollment run weekly, or at a minimum, monthly.</p>	<p>For SFA-Wide CEP:</p> <p>During month of October and on or before April 1</p> <p>Additional Runs: As needed to recalculate ISP in response to changes in the identified student or enrollment population. <i>Encouraged more often to match students to DC for other programs like Title 1.</i></p> <p>For Mixed Districts:</p> <p>Run 1: Between early July and the first day of school.</p> <p>Run 2: Three months after the first run</p> <p>Run 3: Six months after the first run</p> <p>Run 4: Between March 15 and April 1.</p>		
<p>CEP Letter to Households</p> <p>This letter informs households that the students enrolled in a CEP school with access to breakfast and/or lunch will receive free meals for the current school year. All students attending the CEP school will receive breakfast and lunch at no charge. Receipt of meal benefits will not be affected by a household's decision to complete and return an Alternate Household Income Form or USDA Free and Reduced Meal Application. A template CEP Letter to Households can be found online. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/cep-sample-household-letter.doc</p>	<p>Prior to start of school year</p>		

<p>Unpaid Meal Charge Policy</p> <p>For SFAs operating CEP SFA-wide, an Unpaid Meal Charge Policy is not required.</p> <p>For Mixed Districts:</p> <p>The most current version of the SFA’s Unpaid Meal Charge Policy is provided in writing (mail, email, back-to-school packet, student handbook, etc.) to all households at the start of each school year. The policy must be provided in writing to any households transferring to the SFA during the school year. Posting the policy to the school’s public website does not meet the requirement.</p> <p>The policy is provided in writing to all school or SFA-level staff who are responsible for policy enforcement. Provide the policy to principals and district administrators to ensure the policy is supported and applied consistently.</p> <p>It is highly encouraged to review the policy content on a regular basis, such as annually, and update the policy accordingly.</p> <p>Unpaid Meal Charge Policy Resources can be found on the financial management webpage. https://dpi.wi.gov/school-nutrition/program-requirements/financial-management</p>	<p>For SFA-wide CEP: () N/A</p> <p>For Mixed Districts: Prior to the first day of school.</p> <p>Recommended to review and update annually if needed.</p>		
<p>And Justice for All Poster</p> <p>This poster is used to communicate to program participants their right to file a complaint and the procedures. Display an And Justice for All poster in areas where the program is administered (cafeteria, classroom, meal cart). The poster must be posted in a way that is visible and easy to read for program participants.</p> <p>The 2019 version of the poster should be used for all SFAs until the updated version including the updated 2022 non-discrimination statement is provided by USDA. WI DPI is out of posters and until USDA provides a new supply, SFAs may print the poster, linked above, on 11” x 17” paper.</p> <p>Any <u>private</u> SFA electing to use the 2015 version of the non-discrimination statement will continue to use the 2019 version of the poster. https://www.usda.gov/sites/default/files/documents/JFAgreen508.pdf</p>	<p>Prior to start of school year</p>		
<p>Food Safety Plan</p> <p>Conduct annual review of school-level Food Safety Plan(s) and include any necessary updates. SNT recommends scheduling food safety training for staff and volunteers before the start of the school year. Each site requires its own plan. https://dpi.wi.gov/school-nutrition/program-requirements/food-safety</p>	<p>Prior to start of school year</p>		
<p>Wisconsin School Day Milk Program Claim</p> <p>Submit the Wisconsin School Day Milk Program (WSDMP) claim to DPI for the 2022-23 school year. https://dpi.wi.gov/school-nutrition/programs/milk-programs/wisconsin-school-day-milk</p> <p>SFAs with CEP SFA-wide will need to utilize the DPI Alternate Household Income Form to obtain Free and Reduced-Price eligibility since this is not a USDA program. Mixed CEP districts may use the USDA Free and Reduced Meal Application.</p>	<p>August 31 () N/A</p>		

<p>Elderly Nutrition Program Claim</p> <p>Submit the Elderly Nutrition (EN) Program Claim to DPI for the prior school year. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/en-claims-manual.pdf</p>	<p>August 31 () N/A</p>		
<p>Afterschool Snack Program</p> <p>Complete Afterschool Snack Program Onsite Monitoring Form and keep on file at the SFA. Two reviews are required each year, the first occurring within the first four weeks of snack service. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/asp-on-site-monitoring-form.docx</p> <p>Note: The individual school ISP x 1.6 must be used to establish area eligibility. If an SFA applied for CEP as a district or group and shares an ISP, the individual school ISP X 1.6 must be used for determining area eligibility. CEP schools that are not area eligible claim snacks using the same group claiming percentage they use to claim meals under NSLP/SBP.</p>	<p>Review 1: Within the first four weeks of snack service.</p> <p>Review 2: Later in the school year. () N/A</p>		
<p>Civil Rights Training</p> <p>Complete the annual Civil Rights Training for staff involved with USDA Child Nutrition Programs. This includes school staff (permanent, temporary, fill-in), volunteers and food service staff. Maintain a copy of the training and attendance log at the SFA. https://dpi.wi.gov/school-nutrition/program-requirements/civil-rights#crtraining</p>	<p>Complete by the first day of school or whenever new staff are employed.</p>		
<p>Civil Rights Compliance Self-Evaluation (PI-1441)</p> <p>Complete the Civil Rights Compliance Self-Evaluation Form and keep on file at the SFA. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/1441-civil-rights-compliance-self-evaluation.doc</p>	<p>Complete by October 31</p>		
<p>Verification</p> <p>For SFAs operating CEP SFA-wide, the verification process is not required.</p> <p>For Mixed Districts: Verification is required for the non-CEP sites (those accepting free/reduced price applications) within the district. See the General Calendar for more information. For detailed information regarding the verification process, please refer to the corresponding sections in the General Calendar of Requirements. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/calendar-of-requirements-general.pdf</p>	<p>Start process on or after October 1 () N/A</p>		
<p>Special Provision Match</p> <p>Run full enrollment of all students in CEP schools through DC no later than the last operating day in October.</p>	<p>Run DC by October 31</p>		
<p>FNS-10 Report</p> <p>Submit the FNS-10 Report to DPI. This report includes enrollment data and the number of students approved free and reduced-price meals as of the last day lunch was served in October. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/fns-10-instructions.pdf</p>	<p>Portal Opens November 1 Due November 30</p>		

<p>FNS-828 Paid Lunch Price Report (PLP)</p> <p>Submit the Paid Lunch Price Report to DPI. 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).</p> <p>Submission of this report is required even if your SFA is nonpricing. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/paid-lunch-price-report-instructions.pdf</p>	<p>Portal Opens November 1</p> <p>Due November 15</p>		
<p>FNS-742 Verification Collection Report (VCR)</p> <p>CEP schools are not required to complete verification but are still required to submit the VCR. Non-CEP schools must complete the verification process by November 15. The Verification Collection Report can be submitted any time between November 1 and February 1 following the detailed VCR Instructions. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/vcr-instructions.pdf</p>	<p>Portal Opens November 1</p> <p>Due February 1</p>		
<p>Onsite Monitoring</p> <p>Onsite monitoring is required annually for SFAs that have more than one school/location where meals are served, as designated within the online contract. This monitoring helps ensure program requirements are being met at each school. Onsite monitoring is required annually for lunch and a minimum of 50% of schools participating in the School Breakfast Program must also be monitored annually, with each school operating the School Breakfast Program being monitored at least once every two years. All monitoring must be completed onsite. The offsite monitoring waivers offered under COVID-19 are expired.</p> <p>The required onsite monitoring forms are located on the Onsite Monitoring website. Complete the forms and maintain on file for three years plus the current. https://dpi.wi.gov/school-nutrition/program-requirements/on-site-monitoring</p>	<p>Complete by February 1 for all sites</p>		
<p>School Breakfast Program (SBP) Outreach</p> <p>SFAs must inform families of the availability of reimbursable breakfasts served under the School Breakfast Program (SBP) at the beginning and throughout the school year. The goal of providing school breakfast outreach is to increase participation in the SBP. Team Nutrition created the School Nutrition Outreach Toolkit to help with this outreach. https://dpi.wi.gov/wisconsin-school-meals-rock/school-nutrition-professionals/school-nutrition-outreach-toolkit</p>	<p>Beginning and throughout the school year</p>		
<p>Summer Food Service Program (SFSP) Outreach</p> <p>All SFAs are also required to inform households before the end of the school year of the availability and location of meals offered through the SFSP. Outreach for SFSP must be completed by all SFAs regardless of whether SFSP is offered by the SFA itself. More information is located on the Outreach webpage. https://dpi.wi.gov/school-nutrition/program-requirements/outreach</p>	<p>Prior to end of the school year</p>		

<p>Professional Standards</p> <p>Complete and log appropriate number of continuing education hours required to meet the annual professional standards training requirements for all school nutrition program staff and non-school nutrition program staff with job duties pertaining to school nutrition programs. More information on required hours and template training trackers is available on the Professional Standards webpage. https://dpi.wi.gov/school-nutrition/program-requirements/professional-standards</p> <p>For New Food Service Directors, ensure documentation is maintained on site to support the Professional Standards Hiring Requirements or request an exemption if qualify. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/professional-standards-hiring-in-a-nutshell.pdf</p>	<p>Complete and log annual training requirements by June 30</p>		
<p>Local Wellness Policy (LWP)</p> <p>Information on the LWP Content Requirements can be found on the local wellness policy webpage. SFAs must annually notify the public regarding policy content. https://dpi.wi.gov/school-nutrition/program-requirements/local-wellness-policy</p> <ul style="list-style-type: none"> • Review annually for updates. (Recommended, not required) • Assessment and evaluation of LWP is required at least every 3 years. • SFAs must also make the assessment available to the public. 	<p>Notify the public of annual policy content and of the triennial assessment when completed.</p>		
<p>Nonprogram Food Revenue Tool</p> <p>SFAs are required to annually complete the DPI Nonprogram Food Revenue Tool or the USDA Nonprogram Food Revenue Tool. The DPI tool is recommended since it aids in calculating prices of nonprogram foods to ensure USDA revenue requirements are met as found in SP20-2016 Nonprogram Food Revenue Requirements. http://dpi.wi.gov/sites/default/files/imce/school-nutrition/xls/non-program-food-price-calculator.xlsx</p> <p>SFAs that sell only nonprogram milk and adult meals are exempt from completing the tool.</p> <p>More information can be found on the Financial Management webpage. https://dpi.wi.gov/school-nutrition/program-requirements/financial-management</p>	<p>June 30 () N/A</p>		

Ongoing Daily and Monthly Tasks Required for the USDA Child Nutrition Programs

Frequency	Requirement
<p>Daily</p>	<p>Complete Daily Production Records</p> <p>Production records document that reimbursable meals were planned and served. School must keep production and menu documentation for all meals they produce for three (3) years plus the current school year. https://dpi.wi.gov/school-nutrition/program-requirements/menu-planning/production-records</p>
<p>Continuous as products change or new menu items are added</p>	<p>Collect/Update Crediting Documentation</p> <p>Crediting is the process to specify how individual food items contribute towards the Child Nutrition Program meal patterns. Crediting documentation includes Child Nutrition (CN) Labels, Product Formulation Statements, Nutrition Facts labels, standardized recipes, and/or USDA Product Information Sheets. All crediting documentation must be for the exact products purchased.</p> <p>Child Nutrition (CN) labels: CN labels must be original copies, preferably obtained from the box of the product or directly from the manufacturer. CN labels that are watermarked with “copy not for federal reimbursement purposes” or “stock copy” may not be used to document crediting of a product. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/crediting-in-a-nutshell.pdf</p>
<p>Continuous as products change or new menu items are added</p>	<p>Standardized Recipes</p> <p>All menu items made in-house with two or more ingredients requires a standardized recipe. A standardized recipe is one that has been tried, tested, evaluated, and adapted for use by your school food service. It produces a consistent quality and yield every time when the exact procedures, equipment, and ingredients are used. Standardized recipes must be updated every time products or procedures change. https://dpi.wi.gov/school-nutrition/program-requirements/menu-planning/standardized-recipes</p>
<p>Start of the school year and as needed</p>	<p>Post Reimbursable Meal Signage</p> <p>Signage must be posted in a visible area near the meal service line that shows students how to select a reimbursable meal. SFAs using Offer versus Serve (OVS) must include the required wording to select at least ½ cup of fruit, vegetable, or a combination. https://dpi.wi.gov/school-nutrition/program-requirements/menu-planning/signage</p>
<p>Continuous as products change or new offerings are added</p>	<p>Complete Smart Snacks Documentation</p> <p>Smart Snacks applies to any competitive foods sold on the school campus during the school day. This includes foods sold a la carte, in vending machines, at school stores, snack/coffee bars, or concession stands, and during fundraisers. Foods and beverages sold in schools must meet both the Smart Snacks general standards and the nutrient standards if they do not qualify for an exemption. All food and beverage fundraisers held on school campus during the school day must be tracked. https://dpi.wi.gov/school-nutrition/program-requirements/smart-snacks</p> <p>Use the Smart Snacks Product Calculator to determine if a product is compliant. https://foodplanner.healthiergeneration.org/calculator/</p>

<p>Continuous as products change or new menu items are added</p>	<p>Document Buy American Non-Compliant Products</p> <p>The Buy American provision requires SFAs to purchase, to the maximum extent practicable, domestic commodity or product. It is each SFA's responsibility to ensure USDA dollars are spent on American grown products. SFAs must track non-domestic product(s) purchased which do not comply with the Buy American Provision. https://dpi.wi.gov/school-nutrition/program-requirements/procurement/buy-american</p>
<p>Complete monthly prior to each claim</p>	<p>Complete an Edit Check</p> <p>An edit check is required prior to submission of each claim for reimbursement to ensure the claim information is accurate. Obtain daily meal counts for each participating school as noted in the online contract. If using an automated accountability system, this process may be built into it. Maintain the monthly edit checks from each school at the SFA. https://dpi.wi.gov/school-nutrition/program-requirements/claiming</p> <p>A Manual Edit Check Form can be found online. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/monthly-edit-check.docx</p> <p>An Electronic Edit Check for SFAs Operating CEP can be found online. http://dpi.wi.gov/sites/default/files/imce/school-nutrition/xls/cep-editcheck.xlsx</p>
<p>Monthly</p>	<p>Submit Monthly Reimbursement Claim</p> <p>The Claim Manual provides step by step instructions. https://dpi.wi.gov/sites/default/files/imce/school-nutrition/site-based-claiming-manual.pdf</p> <p>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.</p> <p>SFAs blocked from submitting claims online must submit the claim as an email attachment to Jacqueline Darrow at jacqueline.darrow@dpi.wi.gov. The 60-day claiming deadline still applies.</p>

Reimbursement Claim Deadlines

Claims for reimbursement for meals/milk served under the NSLP, SBP, Afterschool Snack Program (ASP), and Special Milk Program (SMP) must be submitted to DPI online for payment **within 60 calendar days after the end of the claiming period**. Only one claim per program is accepted per payment processing period. The [Permanent Agreement](#) recommends that claims be submitted by the 15th of the month following the month of service.

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 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 in leap years)

**June reimbursement claims may be submitted after the last day of service, before the end of the month.*

USDA Foods Distribution Program

Please review the [USDA Foods Program Timelines](https://dpi.wi.gov/school-nutrition/usda/timelines) resource for additional information.

<https://dpi.wi.gov/school-nutrition/usda/timelines>

Tasks for SFAs Opting to Order USDA Foods	Dates
<p>Annual USDA Foods Order Survey</p> <p>SFAs use entitlement to order USDA Foods for the next school year. Submit to DPI via Online Services, USDA Foods Ordering System (<i>dpi.wi.gov/nutrition/online-services</i>).</p>	<p>February/March (exact dates emailed to SFA's primary contact in January)</p>
<p>Delivery of USDA Foods</p> <p>SFAs choose between DPI's subcontracted distributor or a commercial distributor for delivery of USDA Foods for next year. SFAs opting for commercial distribution follow procurement requirements. Submit to DPI via Online Services, USDA Foods Ordering System (<i>dpi.wi.gov/nutrition/online-services</i>).</p>	<p>March 31</p>
<p>USDA Foods Inventory Management and Monitoring</p> <p>SFAs plan to use the pounds and cases in the school year products are distributed.</p>	<p>Monthly</p>
<p>USDA Foods Fair Share/Bonus Surplus Order</p> <p>SFAs submit orders to DPI via Online Services, USDA Foods Ordering System (<i>dpi.wi.gov/nutrition/online-services</i>).</p>	<p>Depending on availability (opportunities are emailed to SFA's primary contact)</p>
<p>USDA Foods Invoices for Fees</p> <p>Review the monthly USDA Foods invoice in Online Services, USDA Foods Ordering System and compare to fees deducted from monthly reimbursement claims (<i>dpi.wi.gov/nutrition/online-services</i>).</p>	<p>Monthly</p>

Please email dpifns@dpi.wi.gov or call 608-267-9228 with any questions regarding the school nutrition programs.

This institution is an equal opportunity provider.