

School Nutrition Programs Administrative Review Checklist

The **School Nutrition Programs (SNP) Administrative Review (AR)** includes an evaluation of the National School Lunch Program, School Breakfast Program, Seamless Summer Option, Special Milk Program, Afterschool Snack Program, and/or Fresh Fruit and Vegetable Program. The Illinois State Board of Education reviews program records for compliance with state and federal regulations. This checklist assists in preparing for the administrative review which will include an evaluation of records for the current fiscal year unless otherwise noted. If your district is CEP districtwide, there is a more appropriate CEP districtwide checklist.

The [SNP Administrative Handbook](#) is a helpful resource when you have questions or concerns regarding items in this checklist.

Eligibility Documentation

Additional Resource: [Certification of Eligibility](#)

- _____ Official Direct Certification reports will be evaluated.
- _____ Documentation of the extension of benefits will be evaluated. Click here for a sample form: [Extension of Benefits form](#)
- _____ The Direct Certification Notification Letters will be reviewed. Click here for a sample letter: [DC FREE Notification Letter](#) & [DC Reduced Notification Letter](#)
- _____ Income applications must contain the required information:
 - Names of all household members
 - All household income and how frequently received
 - Signature of an adult household member
 - Last four digits of the social security number of the adult household member who signs the application, or the no SS# box must be checked, if no signature.
- _____ Temporary Assistance for Needy Families (TANF) or Supplemental Nutrition Assistance Program (SNAP) applications must contain the required information:
 - 9-digit case number
 - Signature of an adult household member
- _____ Adequate eligibility for foster children must be on file. Documentation may include:
 - A copy of the current legal document from DCFS, court, or foster care agency.

OR

 - A current Household Eligibility Application which includes:
 - The name of the foster child.
 - Box checked to apply for the foster child or children. More than one foster child may be included on a single application.
 - The signature of an adult guardian with whom the foster child(ren) resides.
- _____ Documentation for categorically eligible children must be on file. Children documented as homeless, migrant, runaway, and Head Start are categorically eligible to receive free meals. Click here for a sample form: [Categorical Eligibility Documentation form](#).
- _____ Applications must be correctly approved for free and reduced-price meals based on the current USDA income guidelines. Click here for the current guidelines: [School Year 24-25 Income Eligibility Guidelines](#)

_____ Written notification to parents for the denial of applications must be available for review. Click here for a sample letter: [Denial/Approval Notification Letter](#)

Benefit Issuance

Additional Resource: [Benefit Issuance, Meal Counting and Claiming](#)

_____ The document used to issue each child's eligibility status (free, reduced, or paid) must be available for review.

_____ The district's meal charge policy must be available for review. [Overcoming the Unpaid Meal Challenge](#) is a booklet summarizing the policy requirements and strategies used by schools across the nation. [Unpaid Meal Charges Information](#) link takes you to the various documents surrounding this topic.

Verification of Household Eligibility Applications

Additional Resource: [Verification](#)

_____ Verification of applications must be completed, documented, and available for review.

- Adequate number of applications must be verified, and the verification process completed by November 15.
- Sponsors must designate a Confirming Official to conduct a confirmation review on each application selected for verification to ensure the initial determination was accurate. Documentation of the confirmation review must be recorded for each application: [Confirmation Review and Verification Tracking Form](#)
- Direct verification may be completed on selected applications. Steps for direct verification are found on page I-5 of the handbook [here](#).
- The verification notification letter must include all required information. Click here for a sample letter: [We Must Verify Your Application](#).
- Acceptable documentation must be received from each selected household.
- Summary of verification must be maintained and include the number of applications on file as of October 1, the selection method used, number verified, and results: [Verification Summary Report Data Collection Form](#)
- Each household must be notified of the results of verification. The termination/reduction notice to households (if applicable) must contain all required information including notification of appeal rights. Click here for a sample letter: [We Have Verified Your Application](#).

Claim for Reimbursement

Additional Resource: [Benefit Issuance, Meal Counting and Claiming](#)

_____ Available claim data, by site, for the month of review must be available. The month of review is determined by the ISBE monitor. Claim data must include:

- Daily meal counts by category (free, reduced, or paid).
- Enrollment
- Number of children eligible for free and reduced-price meals

_____ Claim information is checked to ensure:

- No mathematical errors occurred
- Figures are not transposed or copied incorrectly
- Ineligible meals such as adult meals, second meals, and a la carte meals are not claimed
- An accurate number of days are reported for each claim period.

On-Site Reviews

Additional Resource: [Reviews](#)

_____ If the school food authority has more than one feeding site, an on-site review must be conducted and documented at lunch for all sites and at breakfast for 50% of the feeding sites by February 1. The on-site review forms must be available for review. Click here for a sample form: [On-site Review form](#)

Local Wellness Policy

Additional Resource: [Local Wellness Policy](#)

_____ A locally developed wellness policy must be in place, contain the required elements, announced to the public, and re-evaluated periodically. The approved local wellness policy must be available for review. Click here for guidance on developing the policy: [Local Wellness Policy](#)

_____ The local policy must include procedures for reviewing and approving or denying requests for exempted fundraising days.

_____ A Triennial Assessment must be completed at least once every three years to assess compliance with the local wellness policy. Assessment results must be made available to the public.

Resources: [Triennial Assessment Template](#); [Triennial Assessment FAQs](#)

Menus

Additional Resource: [Menu Planning & Meal Pattern Requirements](#) and [Dietary Accommodations](#)

_____ Menus must contain all components/menu items and must meet the daily and weekly requirements. Click here for guidance: [Meal Patterns](#)

- Maintain adequate documentation to support supply chain issues.

_____ Production records must contain all components/menu items and must meet the daily and weekly requirements. Click for [Production Records](#). (Scroll down to the Menu Planning Tools section and click the down arrow on the right side, then scroll down to the Production Records area for sample Production Records.)

_____ Child Nutrition (CN) labels, school meal equivalents, nutrition fact labels, standardized recipes and/or other crediting documentation must be available to support the nutritional contribution of the food to the meal. Click here for guidance: [TIP Sheet for Processed Product Documentation](#)

_____ If the required meal pattern requirements are not followed, children with life-threatening disabilities require a Physician's Statement for Meal Accommodations. Click here and select "Modifications Related to a Disability" for a sample form: [Medical Authority Modified Meal Request Form](#).

_____ A request for a substitute meal component due to a preference or a milk substitute must be on file for children without a disability. Click here and select "Modification Related to a Preference" for a sample request form: [Preference Modified Meal Request Form](#).

- The milk substitution must provide the same key nutrients found in regular cow's milk. For a list of those nutrient requirements, click on the following link and scroll down and click on, "Fluid Milk Substitutions": [Nutrients Required for Milk Substitutions](#)

Meal Service

Additional Resource: [Menu Planning & Meal Pattern Requirements](#)

- _____ Adequate food quantities must be prepared and correct portion sizes served.
- _____ Each site must offer two fat-free or low-fat (1%) fluid milk choices daily.
- _____ Drinking water must be made available to all children.

Meal Count Procedures

Additional Resource: [Benefit Issuance, Meal Counting and Claiming](#)

- _____ Free, reduced-price, and paid meals must be counted, by category, at the point of service.
- _____ Meals counted for reimbursement must contain the required components or food items.
- _____ Anonymity of children receiving free and reduced-price meals must be protected.

Offer versus Serve

Additional Resource: [Menu Planning & Meal Pattern Requirements](#) (see pages C-27 and C-33)

- _____ Signage must be posted. *Click here for sample signs:* [SBP OVS Sign](#); [NSLP OVS Sign](#)
- _____ At lunch, a minimum of three components must be taken. One of the three components must be a minimum of ½ cup fruit or vegetable.
- _____ At breakfast, a minimum of four food items must be offered.
- _____ At breakfast, a minimum of three food items must be taken. One of the three items must be a minimum of ½ cup fruit or vegetable.
- _____ Point of service staff must be trained. *Click here for offer versus serve training guidance:* [Offer versus Serve for K-8](#); [Offer versus Serve 9-12](#)

Food and Beverage Requirements (aka Smart Snacks)

Additional Resource: [USDA Smart Snacks in Schools](#)

- _____ Foods and beverages sold outside of or in addition to the reimbursable meal must meet Smart Snack standards. These standards apply during the school day anywhere on the school campus/grounds. *Click here for* [A Guide to Smart Snacks in Schools](#).
- _____ Nutrition documentation, such as the [Smart Snacks calculator](#) results, Nutrition Facts labels, and product specifications must be on file.
- _____ Documentation of exempted fundraiser days for each site must be available for review. *Click here for fundraiser fact Sheet:* [Smart Snacks & Fundraisers](#)
 - Grades 8 and below are not allowed exempted fundraiser days.
 - Grades 9-12 are limited to no more than nine exempted fundraiser days per school year.
- _____ All revenue from the sale of any food or beverage to students in the food service areas during the meal periods must accrue to the nonprofit school food service account.

Buy American

Additional Resources: [Buy American Fact Sheet](#) and [FNS Policy Memo SP38-2017 Compliance with and Enforcement of the Buy American Provision](#)

_____ Foods purchased and used in school meals must, to the maximum extent practicable, be produced or processed in the United States. A sample of food items will be evaluated to ensure Buy American requirements are met.

_____ Limited exceptions to the Buy American provision allow for the purchase of products that do not meet the “domestic” standard when use of domestic products is not practicable. Non-domestic purchases must be documented. A sample form is the [“Buy American – Record of Exception”](#).

Sanitation

Additional Resource: [Miscellaneous Regulations](#) (see pages J-15 and J-16)

_____ Two food safety inspections must be conducted each school year. If two inspections have not been conducted, a letter to the local health department requesting the inspection(s) must be on file. *Click for a sample* [Letter to Request Food Safety Inspection\(s\)](#).

_____ A copy of the most current health inspection must be posted in a prominent place. Citations must be corrected.

_____ Each site should have a written food safety plan that incorporates HACCP principles and Standard Operating Procedures (SOP’s) where food is prepared, stored, or served for any federally funded Child Nutrition Program. *Click here for sample food safety plan:* [Template for Developing a Food Safety Plan](#). *Click here for sample SOPs:* [Standard Operating Procedures](#)

_____ Temperature logs for all cold/hot food items and food storage areas must be available for review. [For sample logs, click here, scroll to Food Safety Logs](#).

Civil Rights

Additional Resource: [Civil Rights](#)

_____ Denied free and reduced-price applications should not be disproportionately composed of minority groups.

_____ Data regarding the target population and beneficiaries of the program, by racial/ethnic category, must be on file.

- The racial/ethnic data of students receiving free and reduced-price benefits must be compared to the racial/ethnic categories of the total student population to ensure there are no potential participation barriers for any racial/ethnic group.

_____ The following public notification requirements must be fulfilled:

- USDA-approved poster must be displayed. To request additional posters, [click here](#) and scroll down to “School Nutrition Programs Poster Request Form.”
- Informational materials must be made available in the appropriate translation, as needed.
- Program material must include the nondiscrimination statement and the procedure for filing a complaint.

_____ Documentation of civil rights training to frontline staff and supervisors must be available for review. *Click here for training resources:* [Civil Rights Training Webinar](#); [Civil Rights PPT Slides](#); [CNP Civil Rights Brochure](#) and the [Civil Rights Training Documentation Form](#).

_____ Must have a procedure a procedure in place for receiving and processing complaints. The number and description of complaints alleging discrimination in the current and prior fiscal year will be collected.

Program Outreach

Additional Resource: [Miscellaneous Regulations](#) (see pages J-17)

_____ Must inform households of the availability of the School Breakfast at the beginning of the school year or in the registration packet that includes location, time, etc. In addition, schools should send reminders regarding the availability of the SBP multiple times throughout the school year.

_____ Notification to eligible families of the availability of the Summer Food Service Program and location of free meals for students when the regular school year ends must occur. *Click here and scroll down to Marketing Materials/Outreach; Flyer:* [SFSP Outreach](#)

Professional Standards

Additional Resource: [Miscellaneous Regulations](#) (see pages J-18 – J-22)

_____ For Food Service Directors hired after July 1, 2015, including directors through internal promotions, provide hiring documentation that supports education/experience requirements. Documentation may include college transcripts or resumes.

_____ From last school year, training documentation will be reviewed to determine if all school nutrition directors, managers (head cooks), and staff met the minimum annual training requirements. *Resources:* [Summary of Professional Standards](#); [Guide to Professional Standards in School Nutrition Programs](#) and [Q/A Professional Standards](#).

Resource Management

Additional Resource: [Financial Management: Resource Management](#)

_____ Complete the Resource Management risk assessment tool accessed by the link provided in your announcement letter. This tool determines which areas of RM are evaluated during the review. [Resource Management Fact Sheet](#) and [Resource Management Overview](#)

_____ The areas of RM include the Nonprofit Food Service Account, the Paid Lunch Equity (PLE) tool, Revenues from Nonprogram Foods and Indirect costs. Click the following links for a fact sheet on each area – [Maintenance of the Nonprofit School Food Service Account](#), [Paid Lunch Equity \(PLE\)](#), [Revenue from Nonprogram Foods](#), [Indirect Cost](#).

Fresh Fruit and Vegetable Program (FFVP) - if applicable

Additional Resource: [FFVP Handbook](#) and [FFVP Website](#)

_____ Expenditure documentation for any reported cost on the FFVP Claim for Reimbursement will be reviewed.

Special Milk Program - *if applicable*

Additional Resource: [SMP](#), [Special Milk Fact Sheet](#) and the ISBE's [SMP Website](#)

_____ The information reported on the Claim for Reimbursement must be supported by adequate documentation.

- Accurately approved Household Eligibility Applications, Direct Certification documentation, extension of benefits documentation, or categorical documentation must be on file for children receiving free milk.
- Monthly milk counts must validate the number of half pints of milk served to eligible children and claimed for reimbursement.
- Dairy receipts must ensure an adequate amount of milk is purchased to support the monthly milk counts.
- The dairy cost reported on the claim must match the purchase price on invoices.

Afterschool Snack Program - *if applicable*

Additional Resource: [Overview of Child Nutrition Programs](#) (see pages A-14 – A-15) and [Menu Planning & Meal Pattern Requirements](#) (see pages C-40 – C-42)

_____ Sites must offer educational or enrichment activities.

_____ Area eligible sites must take an accurate daily count of the total number of snacks served.

_____ Monthly counts must validate the number of snacks served to eligible children and claimed for reimbursement.

_____ Menus and production records must be available for review and contain all components.

_____ Anonymity of children receiving free and reduced-price snacks must be protected.

_____ On-site reviews must be conducted twice annually for each site participating in the afterschool snack program and documentation must be available for review. Click here for a sample form: [After-School Care Snack Review form](#).

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