



CACFP Training Resources Sponsoring Organizations Adult Care Component

USDA requires sponsoring organizations (agencies with more than one site participating on the CACFP) to conduct CACFP training for key staff from every site before they are held responsible for tasks and annually thereafter.

This checklist identifies key staff who should be trained on each topic and resources that can be used to train.

- Check the box(es) to indicate the DPI resources used for training
- Keep this completed *CACFP Training Resources* and [CACFP Training Checklist](#) on file

CACFP E-Learning Course	Lessons in the E-Learning Course provide instruction on many CACFP requirements. Completing lessons can help meet the requirements for training key staff. Some topics do not have an E-Learning lesson. Click on the link to access the Course: Adult Care Component
Guidance Memorandums (GM)	The GMs referenced below provide CACFP requirements, resources, and forms for each topic. Use this information to train staff. Click on the GM Webpage link to access the GMs.

Monitors must be trained on all topics where indicated as Key Staff.

1. Civil Rights

Key Staff: All staff

Key Points to Understand	GM
<ul style="list-style-type: none"> • Equal treatment for all participants • Knowledge of rights and responsibilities • Elimination of illegal barriers that prevent or deter people from receiving benefits • Dignity and respect for all 	GM 8: Review one of these two resources with staff: <input type="checkbox"/> CACFP Civil Rights Training Handout <input type="checkbox"/> Civil Rights Training PowerPoint

2. CACFP Meal Pattern

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

Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> • Required meal/snack components • Required serving sizes • Serving requirements for meal service method used (pre-plated, family-style dining, or cafeteria-style) • Requirements and documentation for special dietary needs requests 	<input type="checkbox"/> <i>CACFP Meal Pattern</i> <input type="checkbox"/> <i>Meal Service Styles</i>	Review in GM 12A: <input type="checkbox"/> Adult Day Center Meal Pattern <input type="checkbox"/> Meal Service Styles
	Special Dietary Needs <input type="checkbox"/> <i>Special Dietary Needs Requests</i>	Review in GM 12A: <input type="checkbox"/> Special Dietary Needs and the CACFP

3. Time of Service Meal Counts

Key Staff: Staff who complete time of service (TOS) meal counts; Staff who supervise those who complete TOS meal counts; Staff who compile claims; Monitors

Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> • Only claim meals for eligible adult participants • Record at time of service or immediately after • Do not record before a meal/snack based on the # of participants expected to eat • Do not record based on attendance records/rosters • Do not count a participant when served an incomplete meal • Do not claim meals served to ineligible adults, staff, or volunteers • Only record a meal/snack when the program supplies all or all but one component (family supplies only one component) 	<input type="checkbox"/> <i>Meal Counts</i>	Review template meal count forms in GM 9A: <input type="checkbox"/> Meal Count Form (Three or Less Meals) <input type="checkbox"/> Meal Count by Name Form <input type="checkbox"/> Greater than Three Meals Record (M-F)



CACFP Training Resources Sponsoring Organizations Adult Care Component

4. Recordkeeping Requirements

Review [Required Documents List](#)

Menus and Production Records (PR)

Key Staff: Staff who plan menus, complete production records, and purchase food; Monitors

Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> Menus must include all food items served to meet meal pattern requirements. See <i>Menu Checklist</i> for details. Document substitutions on menu kept with claim. Maintain support documentation for whole grain-rich items, cereal, yogurt, and tofu Complete daily production records for each approved meal service, including all food substitutions List all meal components and total amounts prepared on production records; use one of the Production Record forms listed under GM12A Indicate "HM" for homemade combination dishes and "CN" for foods that are CN labeled 	<input type="checkbox"/> CACFP Meal Pattern <input type="checkbox"/> Production Planning	Review GM 12A: <input type="checkbox"/> Meal Requirements Calculator <input type="checkbox"/> Food Buying Guide (FBG) Calculator <input type="checkbox"/> FBG Calculator Instructions <input type="checkbox"/> Production Record Instructions <input type="checkbox"/> PR: Breakfast, Lunch/Supper, Snack <input type="checkbox"/> PR: All Meals (Daily) <input type="checkbox"/> Menu Checklist

Enrollment and Income Eligibility Information

Key Staff: CACFP Administrative Staff; Monitors

Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> Adults 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 (Individualized Service Plans) on file for all participants Valid Household Size Income Statement (HSIS) on file for each eligible adult participant claimed as free/reduced A eligible adult participant's eligibility (F, R, N) is recorded on the Household Size Income Record (HSIR) Eligible participants without a valid HSIS, or those over eligibility requirements, are marked as non-needy on HSIR 	<input type="checkbox"/> Household Size Income Statements (HSIS) <input type="checkbox"/> Household Size Income Record (HSIR)	<input type="checkbox"/> Review GM 6A Review in GM 1A: <input type="checkbox"/> Household Size Income Statement <input type="checkbox"/> Instructions for Determining HSIS <input type="checkbox"/> Household Size Income Record <input type="checkbox"/> HSIR Instructions

Attendance

Key Staff: Staff who maintain attendance records; Monitors

Key Point to Understand

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

Income and Expense Records

Key Staff: Staff with financial recordkeeping responsibilities

Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> CACFP funds must only be used to pay for allowable costs Dated and itemized receipts/invoices on file and accessible Track CACFP costs and revenues (ex. General Ledger) Submit CACFP <i>Financial Report</i> that includes <u>actual</u> expenses paid with CACFP reimbursement 	<input type="checkbox"/> Financial Management <input type="checkbox"/> Quarterly Financial Reports	Review in GM 11: <input type="checkbox"/> Frequent CACFP Costs



CACFP Training Resources **Sponsoring Organizations** *Adult Care Component*

5. Claim Submission

Key Staff: Staff who compile and submit claims

Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> Multiple people review all forms (meal counts, menus, attendance records, HSIS, HSIR) and the compiled claim for accuracy, prior to submission 	<input type="checkbox"/> CACFP Claims <input type="checkbox"/> Claim Edit Checks	Review in GM 3A: <input type="checkbox"/> Claim Form Instructions ADC <input type="checkbox"/> Meal Edit Checks

6. Monitoring Procedures

Key Staff: All staff with CACFP responsibilities; Monitors

Key Points to Understand	GM
<ul style="list-style-type: none"> Train staff on how monitors will review 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 during normal hours of operation. All CACFP records must be available to these officials. 	<input type="checkbox"/> GM 5A: Monitoring Requirements Section

7. Reimbursement System

Key Staff: Staff who compile and submit claims; Financial staff

Key Points to Understand	GM
<ul style="list-style-type: none"> Identify current Federal reimbursement rates, including Cash-in-Lieu of USDA Foods Understand claiming percentage method to determine amount of reimbursement 	Review in GM 2A: <input type="checkbox"/> Reimbursement calculation worksheet

Monitors

Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> All materials and topics above where monitors are identified as Key Staff Monitoring requirements (time frame, announced/unannounced, meal observation, identifying serious deficiencies and imminent threat to health and safety) How to complete the CACFP Site Pre-operational Visit Form, CACFP Monitoring Form and Monitoring Tracking Form 	<input type="checkbox"/> Monitoring	Review in GM 5: <input type="checkbox"/> Preoperational Visit Form <input type="checkbox"/> Site Review Form <input type="checkbox"/> Monitoring Tracking Form <input type="checkbox"/> Imminent Threat and Serious Deficiencies