CACFP Training Resources
Sponsoring Organizations
Child Care, Head Start, Outside of School Hours, Emergency Shelters

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 must 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: [Child Care Centers, Outside of School Hours, Emergency Shelters, and Head Starts](#)
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
• 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: ☐ [CACFP Civil Rights Training Handout](#) ☐ [Civil Rights Training PowerPoint](#)

2. CACFP Meal Pattern

Key Staff: Food preparers; Teachers 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
• Required meal and snack components • Required serving sizes for each age group • Serving requirements for meal service method used (pre-plated, family-style dining, or cafeteria-style) • Requirements and documentation for special dietary needs requests	**Children Ages 1-18** ☐ *CACFP Meal Pattern (1-18 Yrs)* ☐ *Meal Service Styles*	Review in GM 12: ☐ [CACFP Meal Pattern (Ages 1-18)](#) ☐ [Meal Service Styles](#)
	Infants ☐ *Infant Meal Pattern* ☐ *Creditable Infant Foods*	Review in GM 12: ☐ [Infant Meal Pattern and Grains Chart](#) ☐ [Foods for Infants](#)
	Special Dietary Needs ☐ *Special Dietary Needs Requests*	Review in GM 12: ☐ [Special Dietary Needs and the CACFP](#)

3. Time of Service Meal (TOS) Counts

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

Key Points to Understand	E-Learning Lesson	GM
• 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 • Do not count a participant when served an incomplete meal • Do not claim meals served to adults • Only record a meal/snack when the program supplies all or all but one component (family supplies only one component)	**Children Ages 1-18** ☐ *Meal Counts*	Review template meal count forms in GM 9: ☐ [Meal Count Form (Three or Less Meals)](#) *or* ☐ [Greater Than Three Meals Record](#)
	Infants ☐ *Infant Recordkeeping & Claiming Requirements*	Review in GM 12: ☐ [Infant Meal Form (B, L, Snack)](#) *or* [Infant Meal Form (All Meals)](#)

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
• Menus must include all food items served to meet meal pattern requirements. See *Menu Checklist* 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 (N/A for Emergency Shelters) • List all meal components and total amounts prepared on production records; use one of the Production Record forms listed under GM12 • Indicate "HM" for homemade combination dishes and "CN" for foods that are CN labeled	☐ *CACFP Meal Pattern (1-18 Yrs)* ☐ *Production Planning*	Review in GM 12: ☐ Meal Requirements Calculator ☐ Food Buying Guide (FBG) Calculator ☐ FBG Calculator Instructions ☐ Production Record (PR) Instructions ☐ PR: Breakfast, Lunch/Supper, Snack ☐ PR: Daily (All Meals) ☐ Menu Checklist

Enrollment and Income Eligibility Information
(Does not apply to Emergency Shelters)

Key Staff: CACFP Administrative Staff; Monitors

Key Points to Understand	E-Learning Lesson	GM
• CACFP Enrollment form, or other approved form, on file for all participants • Valid Household Size Income Statement (HSIS) on file for participants claimed as free/reduced • Participant eligibility (F, R, N) is recorded on Household Size Income Record (HSIR) • Participants without a valid HSIS, or those over eligibility requirements, are marked as non-needy on HSIR • Sites with children in Head Start (HS): Documentation from HS official, certifying HS enrollment, serving as verification of eligibility as Free in place of collecting HSIS	☐ *Household Size Income Statements (HSIS)* ☐ *Household Size Income Record (HSIR)*	Review in GM 6: ☐ CACFP Enrollment Form Review in GM 1: ☐ Household Size Income Statement ☐ Instructions for Determining HSIS ☐ Household Size Income Record ☐ HSIR Instructions

Attendance

Key Staff: Teachers/staff who maintain attendance records; Monitors

Key Points to Understand

• CCI, Head Start, and Outside of School Hours Sites: Maintain daily attendance records of participants attending sites. Assure accurate sign in/out times.
• Emergency Shelters: Maintain daily roster of participants residing at site. Daily rosters must include participant's name and date of birth.

Income and Expense Records

Key Staff: Staff with financial recordkeeping responsibilities

Key Points to Understand	E-Learning Lesson	GM
• 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 Financial Report* that includes **actual** expenses paid with CACFP reimbursement	☐ *Financial Management* ☐ *Quarterly Financial Reports*	Review in GM 11: ☐ Frequent CACFP Costs

5. Claim Submission

Key Staff: Staff who compile and submit claims

Key Points to Understand	E-Learning Lesson	GM

• Multiple people review all forms (meal counts, menus, attendance records, HSIS, HSIR) and the compiled claim for accuracy, prior to submission	☐ *CACFP Claims* **or** *CACFP Claims- Emergency Shelters*
	☐ *Claim Edit Checks*
		Review in GM 3:
		
		Claim Form Instructions:
		  ☐ Child Care, Outside of School Hours, Head Start **or**
		  ☐ Emergency Shelters
		☐ Meal Edit Checks

6. Monitoring Procedures

Key Staff: All staff with CACFP responsibilities; Monitors

Key Points to Understand	GM
• 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.	☐ GM 5: Monitoring Requirements section

7. Reimbursement System

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

Key Points to Understand	GM
• Identify current Federal reimbursement rates, including Cash-in-Lieu of USDA Foods • Understand claiming percentage method to determine amount of reimbursement	Review in GM 2: ☐ Reimbursement calculation worksheet **or** ☐ Reimbursement calculation worksheet –Emergency Shelters

Monitors

Key Points to Understand	E-Learning Lesson	GM
• 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 Preoperational Visit Form, Site Review Form* and *Monitoring Tracking Form*	☐ *Monitoring*	Review in GM 5: ☐ Preoperational Visit Form ☐ Site Review Form ☐ Monitoring Tracking Form ☐ Imminent Threat and Serious Deficiencies