# Guidance Memorandum 5C: CACFP Sponsoring Organization Requirements
# CACFP Training Checklist

## 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* (GM 9C) with your CACFP Training records that are retained on file.

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**CACFP Webcasts** http://dpi.wi.gov/community-nutrition/cacfp/training/webcasts-cacfp
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/child-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.

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1. **Civil Rights**
   Key Staff: All Staff
   ❑ Review *CACFP Civil Rights Training PowerPoint or Handout* (under GM 8C)

2. **CACFP Meal Patterns**
   Key Staff:  Food preparers, teachers present at meal time, staff who plan menus, complete production records, help serve meals, and/or review menus to verify meals meet the meal pattern, monitors
   ❑ Review meal pattern(s)
      ❑ *CACFP Meal Pattern for Children ages 1-12+ Years* (GM 12C)
      ❑ *Infant Meal Pattern (if applicable)* (GM 12C)
   ❑ Watch webcast(s)
      ❑ *CACFP Meal Pattern*
      ❑ *CACFP Infant Meal Pattern* and *Creditable CACFP Infant Foods (if applicable)*
   ❑ Review meal service method requirements (GM 12C, Section J)
   ❑ Review special dietary needs requirements (GM 12C, Section, Section N)
      ❑ Review *Medical Statement Flow Chart* (under GM 12C)
      ❑ Review *Claiming Meals with Special Dietary Needs Flow Chart* (under GM 12C)
   ❑ Key points:
      ❑ Understand required meal/snack components (breakfast, snack, lunch/supper)
      ❑ Understand minimum required serving sizes by age group
      ❑ 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

## 3. 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,)

### A. All Agencies Regardless of Number and Type of Meals Claimed
- ❒ Record at time of service or immediately after
- ❒ Do not record before a meal/snack based on the number of children *expected* to eat
- ❒ Do not record meal counts based on attendance or from attendance records
- ❒ Do not record adult meals on meal count forms
- ❒ Double-check head count and number recorded to be sure it matches

### B. Agencies that claim Three or Less Meals/Snacks
- ❒ Watch webcast: *Meal Counts for 3 or Less Meals*
- ❒ Key points:
  - ❒ On *Meal Count Form,* record the total number of participants under the correct meal or snack column for the correct day

### Agencies that claim Greater Than Three Meals/Snacks
- ❒ Watch webcast: *Meal Counts for Greater Than 3 Meals*
- ❒ Key points:
  - ❒ Use *Greater Than Three Meals Record*
  - ❒ List 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 child is not present and/or not seated at table and provided all required components

### C. Agencies that claim Infant Meals
- ❒ Watch webcast: *Claiming CACFP Infant meals*
- ❒ Key points:
  - ❒ Record the specific type and amount of each item offered
  - ❒ Items supplied by parent must be indicated (star, highlight, general comment, etc.)


## 4. Recordkeeping Requirements

### A. Menus/Production Records
Key Staff: Staff who plan menus and complete production records, monitors
- ❒ 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) or other approved form (GM12C)
  - ❒ Indicate "HM" for homemade combination dishes and "CN" for foods that are CN-labeled

### B. Enrollment and Income Eligibility Information
Key Staff:  CACFP Administrative staff, monitors
- ❒ Review Guidance Memorandum 6C *Enrollment Requirements* (excluding At-Risk and Emergency Shelters)
- ❒ Review Guidance Memorandum 1C *Household Size-Income Statements (HSIS)* (excluding At-Risk and Emergency Shelters)
- ❒ Watch Webcasts:  Household Size-Income Statements (HSIS) and Household Size-Income Record (HSIR)

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### *Enrollment and Income Eligibility Information Continued*

- ❒ Key Points:
- ❒ Enrollment forms, or other approvable documentation, on file for all participants (excluding At-Risk and Emergency Shelters)
- ❒ Valid HSIS on file for each participant claimed as free/reduced
- ❒ A participant's determined income eligibility is recorded on Household Size Income Record (HSIR)
- ❒ Participants without a valid HSIS, or those households over the income eligibility, are marked as non-needy on the HSIR
- ❒ Documentation provided by a Head Start official verifying the enrollment of children in Head Start on file for children eligible as free based on Head Start participation

**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 Memorandum 11C

**5. Claim Submission**
Key Staff:  CACFP staff who compiles and submits claims
Child Care Institutions (CCI) / Outside School Hours Sites
- ❒ Watch two (2) webcasts: *Completing the CACFP Claim* and *CACFP Internet Claim Procedures*
- ❒ Review Guidance Memorandum 3C, including Section D for Meal Claim Edit Checks

At-Risk Afterschool Sites and Emergency Shelters
- ❒ Watch two (2) webcasts: *Completing the CACFP Claim: AR, ES* and *CACFP Internet Claim Procedures: AR, ES*
- ❒ Review Guidance Memorandum 3C, including Section D for Meal Claim Edit Checks

**6. 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

**7. Reimbursement System**
Key Staff:  CACFP staff who compiles and submits claims, financial staff
- ❒ Review Guidance Memorandum 2C
- ❒ 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

**MONITORS:** In addition to applicable topics above, Review Guidance Memorandum 5C and 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*

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