

# Requirements for USDA Child Nutrition Programs for 2023-24

## National School Lunch Program (NSLP)

**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.

## 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 Posted	Required	Ongoing		
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		
Update Benefit Issuance List as eligibilities change due to new determinations and/or Verification	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 <b>Year of Prior Triennial Assessment:</b>		
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		
Community Eligibility Provision (CEP) Application or Annual Intent Letter	( ) N/A	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	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 Free and Reduced Price Meal Applications (After July 1)	Required	Before the first day of school and when requested or a new student enrolls		
Compile Benefit Issuance List	Required	Before the first day of school		
Review your SFA's Unpaid Meal Charge Policy and distribute to households	Required	Before the first day of school		
Send the Public Release	Required	Before the first day of school		
Review and update the site-specific Food Safety Plan	Required	Before the first day of school		
Display the <i>And Justice for All</i> Poster	Required	Before the first day of school		
Complete Civil Rights Training	Required	Before the first day of school and when new staff begin their employment		
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. <b>Date Completed:</b>		
July 2023 Reimbursement Claim Due (Submit after August 1)	Required	September 29, 2023		
Direct Certification: Second Full Enrollment Run Required	Required	Three Months After the First Run. <b>Enter Due Date:</b>		
Verification – start verification process (On or After October 1)	Required	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		
Verification – review verification materials	Required	November 15, 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		
Direct Certification: Third Full Enrollment Run Required	Required	Six months after the first run <b>Enter Due Date:</b>		
November 2023 Reimbursement Claim Due (Submit on or after December 1)	Required	January 29, 2024		
Verification Collection Report (VCR/FNS-742 ) (Submit as soon as Verification is complete.)	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	<b>Date Due:</b>		
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><b>USDA Child Nutrition Program Online Contract</b></p> <p>Update/renew the <a href="https://dpi.wi.gov/school-nutrition/program-requirements/contracts">USDA Child Nutrition Program Contract</a> with DPI. The contract must be updated/renewed before each school year. The school year is defined as July 1 – June 30. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/contracts">https://dpi.wi.gov/school-nutrition/program-requirements/contracts</a></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 <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/online-contract-manual.pdf">Contract Manual</a>. <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/online-contract-manual.pdf">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/online-contract-manual.pdf</a></p>	June 9, 2023		
<p><b>Community Eligibility Provision (CEP) Forms</b></p> <p>To participate in CEP, a CEP application consisting of the <a href="https://dpi.wi.gov/school-nutrition/program-requirements/procurement/required-template-agreements/fsmc">Agreement Form and Eligibility Worksheet</a> is due by June 30, 2023. Once approved, it is only necessary to reapply once every four (4) years.</p> <p>For current CEP sites, the <a href="https://dpi.wi.gov/school-nutrition/program-requirements/procurement/required-template-agreements/fsmc">Annual Intent Form</a> 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. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/procurement/required-template-agreements/fsmc">https://dpi.wi.gov/school-nutrition/program-requirements/procurement/required-template-agreements/fsmc</a></p>	June 30, 2023 ( ) N/A		
<p><b>Food Service Management Company Contract</b></p> <p>Before entering into a Food Service Management Company contract, SFAs must use a <a href="https://dpi.wi.gov/school-nutrition/program-requirements/procurement/required-template-agreements/fsmc">Request for Proposal (RFP) DPI Template</a>. 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 <a href="mailto:dpifsmc@dpi.wi.gov">dpifsmc@dpi.wi.gov</a>. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/procurement/required-template-agreements/fsmc">https://dpi.wi.gov/school-nutrition/program-requirements/procurement/required-template-agreements/fsmc</a></p>	June 9, 2023 ( ) N/A		
<p><b>Vended Meal, Joint, or Alternate SFA Agreements</b></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 <a href="https://dpi.wi.gov/school-nutrition/program-requirements/procurement/required-template-agreements">DPI Templates for Vended Meals Agreement or Joint Agreement</a> is required and must be uploaded in its entirety. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/procurement/required-template-agreements">https://dpi.wi.gov/school-nutrition/program-requirements/procurement/required-template-agreements</a></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 <a href="https://dpi.wi.gov/school-nutrition/alternate-sfa-agreement">Alternate SFA Agreement</a>, this agreement must be renewed annually and uploaded, in its entirety, as part of the school nutrition contract. <a href="https://dpi.wi.gov/school-nutrition/alternate-sfa-agreement">https://dpi.wi.gov/school-nutrition/alternate-sfa-agreement</a></p>	June 9, 2023 ( ) N/A		

<p><b>Paid Lunch Equity Tool (PLE)</b></p> <p>The PLE Tool is required to be completed annually to determine paid meal prices. More information and the PLE Tool are located on the <a href="https://dpi.wi.gov/school-nutrition/program-requirements/financial-management">Financial Management website</a>. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/financial-management">https://dpi.wi.gov/school-nutrition/program-requirements/financial-management</a></p> <p><b>For SY 2023-24:</b> 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 <b>do not</b> 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 <a href="https://dpi.wi.gov/nutrition/online-services">Online Services</a>. <a href="https://dpi.wi.gov/nutrition/online-services">https://dpi.wi.gov/nutrition/online-services</a></p>	<p><b>June 9, 2023</b></p> <p><b>( ) N/A</b></p>		
<p><b>Food Service Annual Financial Report (AFR)</b></p> <p>Complete and submit the <a href="https://dpi.wi.gov/school-nutrition/program-requirements/reporting">Food Service Annual Financial Report</a> for the <b>prior</b> fiscal year (July 1, 2022 – June 30, 2023). Ensure all revenues and expenses are broken out by program and expense category. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/reporting">https://dpi.wi.gov/school-nutrition/program-requirements/reporting</a></p>	<p><b>Portal opens the first week in July.</b></p> <p><b>Due August 31, 2023</b></p>		
<p><b>Public Release</b></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.</p> <p>In addition, SFAs should 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 href="https://dpi.wi.gov/school-nutrition/program-requirements/free-reduced-meal-eligibility">Public Releases</a> are located on the SNT website Free and Reduced Meal Eligibility webpage. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/free-reduced-meal-eligibility">https://dpi.wi.gov/school-nutrition/program-requirements/free-reduced-meal-eligibility</a></p> <p>A <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/cep-mixed-district-public-release.doc">Public Release for SFAs Operating as a Mixed District with CEP</a> is available. <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/cep-mixed-district-public-release.doc">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/cep-mixed-district-public-release.doc</a></p>	<p><b>After July 1, but prior to the first day of school</b></p>		

<p><b>Free and Reduced Price Meal Applications</b></p> <p>School meal applications certify children for free and reduced price meals. A student's free and reduced price meal eligibility establishes eligibility for other purposes, such as state reporting, Wisconsin School Day Milk Program, and Summer EBT.</p> <p>If your SFA uses a web-based application, the web-based vendor must be approved by DPI prior to distribution of the application to households. The approved vendor list is updated annually. If using paper applications, download the current year's free and reduced price meal applications and update with your SFAs information. Applications can be posted and distributed to households beginning July 1. All households should receive the application materials by the beginning of the school year unless the household is certified free through Direct Certification (DC) prior to distribution. It is strongly recommended to run DC prior to distributing applications to reduce the number of applications are required to be distributed and processed.</p> <p>The <a href="https://dpi.wi.gov/school-nutrition/program-requirements/free-reduced-meal-eligibility">Free and Reduced Price Meal Application Materials</a> include the application, instructions, parent notification letters and other related forms. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/free-reduced-meal-eligibility">https://dpi.wi.gov/school-nutrition/program-requirements/free-reduced-meal-eligibility</a></p> <ul style="list-style-type: none"> <li>• Process completed applications within ten (10) operating days after the date of receipt.</li> <li>• Send notification to households with students who are eligible for free or reduced price meals and to households that are denied benefits.</li> <li>• Your SFA may also need to distribute a <a href="#">Sharing of Information Letter</a> if your SFA waives fees if a student is eligible for free or reduced price meals. <ul style="list-style-type: none"> <li>◦ <a href="https://dpi.wi.gov/school-nutrition/program-requirements/free-reduced-meal-eligibility#accordion-72806-2">https://dpi.wi.gov/school-nutrition/program-requirements/free-reduced-meal-eligibility#accordion-72806-2</a> Any SFA staff member that is provided with individual student eligibility information for purposes other than school meal benefits, such as fee waivers or State reporting, must have a <a href="#">Disclosure Agreement</a> on file at the district. <ul style="list-style-type: none"> <li>◦ <a href="https://dpi.wi.gov/school-nutrition/program-requirements/free-reduced-meal-eligibility#accordion-72806-2">https://dpi.wi.gov/school-nutrition/program-requirements/free-reduced-meal-eligibility#accordion-72806-2</a></li> </ul> </li> </ul> </li> <li>• The Determining Official (DO) must sign and date all applications.</li> <li>• File all approved and denied applications at the SFA, along with any other documentation supporting eligibility of benefits and retain for three years plus the current school year.</li> </ul>	<p><b>After July 1 and before the first day of school.</b></p>		
<p><b>Direct Certification (DC)</b></p> <p>Conduct a full-enrollment <a href="#">DC</a> 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 into report for USDA and is also used to determine which schools qualify for CEP. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/direct-certification">https://dpi.wi.gov/school-nutrition/program-requirements/direct-certification</a></p> <p>Send notification letters to households categorically eligible for free or reduced price meals. <a href="#">Prototype DC letters</a> are available. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/direct-certification#:~:text=and%20DC%20webcast-,Resources,-Eligibility%20Manual">https://dpi.wi.gov/school-nutrition/program-requirements/direct-certification#:~:text=and%20DC%20webcast-,Resources,-Eligibility%20Manual</a></p> <p><b>SFAs are strongly encouraged to run DC more frequently and when new students enroll.</b> 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><b>Best Practice:</b> Conduct a full enrollment run weekly, or at a minimum, monthly.</p>	<p><b>Run 1:</b> Between early July and the first day of school.</p> <p><b>Run 2:</b> Three months after the first run</p> <p><b>Run 3:</b> Six months after the first run</p> <p><b>Run 4:</b> Between March 15 and April 1.</p>		

<p><b>Benefit Issuance List (BI)</b></p> <p>Gather student eligibility documentation including free and reduced price meal applications, DC student match files, documentation designating students as homeless by the school district’s homeless liaison, documentation designating students as migrant by state migrant coordinator, and documentation for foster, runaway, and Head Start students. Compile and maintain a BI list noting the student’s name, benefit status, date of determination, and benefit determination source (i.e., DC or application).</p> <p>Carryover benefits from the prior school year are in effect for the first 30 operating days of school or until new benefit documentation is received—whichever comes first.</p> <p>Carryover benefit guidance is found in the <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/eligibility-manual.pdf">Eligibility Manual for School Meals</a>.  <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/eligibility-manual.pdf">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/eligibility-manual.pdf</a></p> <p>An <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/beniss_ex.pdf">Example Benefit Issuance List</a> can be found online. <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/beniss_ex.pdf">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/beniss_ex.pdf</a></p> <p>Schools utilizing software should run the report for the BI list after the carryover period ends to ensure all students receiving free or reduced benefits have qualified based on eligibility documentation from the current school year.</p>	<p>Create before the first day of school and update throughout the school year as new determinations are made.</p>		
<p><b>Unpaid Meal Charge Policy</b></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><a href="https://dpi.wi.gov/school-nutrition/program-requirements/financial-management">Unpaid Meal Charge Policy Resources</a> can be found on the financial management webpage.  <a href="https://dpi.wi.gov/school-nutrition/program-requirements/financial-management">https://dpi.wi.gov/school-nutrition/program-requirements/financial-management</a></p>	<p><b>Prior to the first day of school.</b></p> <p>Recommended to review and update annually if needed.</p>		
<p><b>And Justice for All Poster</b></p> <p>This poster is used to communicate to program participants their right to file a complaint and the procedures. Display an <a href="#">And Justice for All poster</a> 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. <a href="https://www.usda.gov/sites/default/files/documents/JFAgreen508.pdf">https://www.usda.gov/sites/default/files/documents/JFAgreen508.pdf</a></p>	<p><b>Prior to start of school year</b></p>		

<b>Food Safety Plan</b> Conduct annual review of school-level <a href="https://dpi.wi.gov/school-nutrition/program-requirements/food-safety">Food Safety Plan(s)</a> 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. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/food-safety">https://dpi.wi.gov/school-nutrition/program-requirements/food-safety</a>	<b>Prior to start of school year</b>		
<b>Wisconsin School Day Milk Program Claim</b> Submit the <a href="https://dpi.wi.gov/school-nutrition/programs/milk-programs/wisconsin-school-day-milk">Wisconsin School Day Milk Program</a> (WSDMP) claim to DPI for the 2022-23 school year. <a href="https://dpi.wi.gov/school-nutrition/programs/milk-programs/wisconsin-school-day-milk">https://dpi.wi.gov/school-nutrition/programs/milk-programs/wisconsin-school-day-milk</a>	<b>August 31</b> ( ) N/A		
<b>Elderly Nutrition Program Claim</b> Submit the <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/en-claims-manual.pdf">Elderly Nutrition (EN) Program Claim</a> to DPI for the prior school year. <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/en-claims-manual.pdf">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/en-claims-manual.pdf</a>	<b>August 31</b> ( ) N/A		
<b>Afterschool Snack Program</b> Complete <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/asp-on-site-monitoring-form.docx">Afterschool Snack Program Onsite Monitoring Form</a> and keep on file at the SFA. Two reviews are required each year, the first occurring within the first four weeks of snack service. <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/asp-on-site-monitoring-form.docx">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/asp-on-site-monitoring-form.docx</a>	<b>Review 1:</b> Within the first four weeks of snack service.  <b>Review 2:</b> Later in the school year.  ( ) N/A		
<b>Civil Rights Training</b> Complete the annual <a href="https://dpi.wi.gov/school-nutrition/program-requirements/civil-rights#crtraining">Civil Rights Training for staff involved with USDA Child Nutrition Programs</a> . 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. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/civil-rights#crtraining">https://dpi.wi.gov/school-nutrition/program-requirements/civil-rights#crtraining</a>	<b>Complete by the first day of school or whenever new staff are employed.</b>		
<b>Civil Rights Compliance Self-Evaluation (PI-1441)</b> Complete the <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/1441-civil-rights-compliance-self-evaluation.doc">Civil Rights Compliance Self-Evaluation Form</a> and keep on file at the SFA. <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/1441-civil-rights-compliance-self-evaluation.doc">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/1441-civil-rights-compliance-self-evaluation.doc</a>	<b>Complete by October 31</b>		



<p><b>Start the <a href="#">Verification</a> Process</b></p> <p>SFAs that collect household free and reduced-price meal applications in SY 2023-2024 are required to conduct verification. The sample size used to conduct verification activities is based on the number of approved applications on file as of October 1, 2023. <a href="#">Verification materials</a> including template letters and a verification tracker form are found on the verification website. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/verification">https://dpi.wi.gov/school-nutrition/program-requirements/verification</a></p> <ul style="list-style-type: none"> <li>Mixed CEP districts must conduct verification for the non-CEP sites (those accepting F/R applications) within the district.</li> <li>If your SFA did not receive any USDA Free and Reduced-Price Meal Applications as of October 1, 2023, the verification process is not required, but the Verification Collection Report is still required.</li> <li>Guidance to SFAs for beginning Verification <u>before</u> October 1 can be found in <a href="#">USDA memo SP42-2017</a>. <a href="https://www.fns.usda.gov/school-meals/beginning-verification-october-1-guidance-local-educational-agencies">https://www.fns.usda.gov/school-meals/beginning-verification-october-1-guidance-local-educational-agencies</a></li> </ul>	<p><b>On or after October 1</b></p>		
<p><b>Verification – Verifying Official reviews verification materials.</b></p> <p>Review documents submitted by each household selected for verification. Follow-up with any households that did not respond to verification request.</p> <ul style="list-style-type: none"> <li>Use template “<a href="#">We Have Checked</a>” letter to notify households selected for verification regarding the outcome of the verification process. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/verification#:~:text=Verification%20Materials%C2%AO">https://dpi.wi.gov/school-nutrition/program-requirements/verification#:~:text=Verification%20Materials%C2%AO</a></li> <li>Make any necessary benefit changes as a result of verification on the benefit issuance list and in point of service (POS) system.</li> </ul>	<p><b>Between October 1 and November 15</b></p>		
<p><b>FNS-10 Report</b></p> <p>Submit the <a href="#">FNS-10 Report</a> 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. <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/fns-10-instructions.pdf">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/fns-10-instructions.pdf</a></p>	<p><b>Portal Opens November 1  Due November 30</b></p>		
<p><b>FNS-828 Paid Lunch Price Report (PLP)</b></p> <p>Submit the <a href="#">Paid Lunch Price Report</a> 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. <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/paid-lunch-price-report-instructions.pdf">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/paid-lunch-price-report-instructions.pdf</a></p>	<p><b>Portal Opens November 1  Due November 15</b></p>		
<p><b>FNS-742 Verification Collection Report (VCR)</b></p> <p>Verification should be completed by November 15. The outcome of the verification process is reported in the Verification Collection Report following the detailed <a href="#">VCR Instructions</a>. <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/vcr-instructions.pdf">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/vcr-instructions.pdf</a></p>	<p><b>Portal Opens November 1  Due February 1</b></p>		

<p><b>Onsite Monitoring</b></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 <a href="https://dpi.wi.gov/school-nutrition/program-requirements/on-site-monitoring">Onsite Monitoring website</a>. Complete the forms and maintain on file for three years plus the current. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/on-site-monitoring">https://dpi.wi.gov/school-nutrition/program-requirements/on-site-monitoring</a></p>	<p><b>Complete by February 1 for all sites</b></p>		
<p><b>School Breakfast Program (SBP) Outreach</b></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 <a href="https://dpi.wi.gov/wisconsin-school-meals-rock/school-nutrition-professionals/school-nutrition-outreach-toolkit">School Nutrition Outreach Toolkit</a> to help with this outreach. <a href="https://dpi.wi.gov/wisconsin-school-meals-rock/school-nutrition-professionals/school-nutrition-outreach-toolkit">https://dpi.wi.gov/wisconsin-school-meals-rock/school-nutrition-professionals/school-nutrition-outreach-toolkit</a></p>	<p><b>Beginning and throughout the school year</b></p>		
<p><b>Summer Food Service Program (SFSP) Outreach</b></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 <a href="https://dpi.wi.gov/school-nutrition/program-requirements/outreach">Outreach webpage</a>. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/outreach">https://dpi.wi.gov/school-nutrition/program-requirements/outreach</a></p>	<p><b>Prior to end of the school year</b></p>		
<p><b>Professional Standards</b></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 <a href="https://dpi.wi.gov/school-nutrition/program-requirements/professional-standards">Professional Standards webpage</a>. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/professional-standards">https://dpi.wi.gov/school-nutrition/program-requirements/professional-standards</a></p> <p>For New Food Service Directors, ensure documentation is maintained on site to support the <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/professional-standards-hiring-in-a-nutshell.pdf">Professional Standards Hiring Requirements</a> or request an exemption if qualify. <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/professional-standards-hiring-in-a-nutshell.pdf">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/professional-standards-hiring-in-a-nutshell.pdf</a></p>	<p><b>Complete and log annual training requirements by June 30</b></p>		
<p><b>Local Wellness Policy (LWP)</b></p> <p>Information on the <a href="https://dpi.wi.gov/school-nutrition/program-requirements/local-wellness-policy">LWP Content Requirements</a> can be found on the local wellness policy webpage. SFAs must annually notify the public regarding policy content. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/local-wellness-policy">https://dpi.wi.gov/school-nutrition/program-requirements/local-wellness-policy</a></p> <ul style="list-style-type: none"> <li>• Review annually for updates. (Recommended, not required)</li> <li>• Assessment and evaluation of LWP is required at least every 3 years.</li> <li>• SFAs must also make the assessment available to the public.</li> </ul>	<p><b>Notify the public of annual policy content and of the triennial assessment when completed.</b></p>		

<p><b>Nonprogram Food Revenue Tool</b></p> <p>SFAs are required to annually complete the <a href="#">DPI Nonprogram Food Revenue Tool</a> or the <a href="#">USDA Nonprogram Food Revenue Tool</a>. The DPI tool is recommended since it aids in calculating prices of nonprogram foods to ensure USDA revenue requirements are met as found in <a href="#">SP20-2016 Nonprogram Food Revenue Requirements</a>.  <a href="http://dpi.wi.gov/sites/default/files/imce/school-nutrition/xls/non-program-food-price-calculator.xlsx">http://dpi.wi.gov/sites/default/files/imce/school-nutrition/xls/non-program-food-price-calculator.xlsx</a></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 <a href="#">Financial Management webpage</a>.  <a href="https://dpi.wi.gov/school-nutrition/program-requirements/financial-management">https://dpi.wi.gov/school-nutrition/program-requirements/financial-management</a></p>	<p><b>June 30</b> <b>( ) N/A</b></p>		
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# Ongoing Daily and Monthly Tasks Required for the USDA Child Nutrition Programs

Frequency	Requirement
Daily	<p><b>Complete <a href="#">Daily Production Records</a></b></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.  <a href="https://dpi.wi.gov/school-nutrition/program-requirements/menu-planning/production-records">https://dpi.wi.gov/school-nutrition/program-requirements/menu-planning/production-records</a></p>
Continuous as products change or new menu items are added	<p><b>Collect/Update <a href="#">Crediting Documentation</a></b></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.  <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/crediting-in-a-nutshell.pdf">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/crediting-in-a-nutshell.pdf</a></p>
Continuous as products change or new menu items are added	<p><b><a href="#">Standardized Recipes</a></b></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.  <a href="https://dpi.wi.gov/school-nutrition/program-requirements/menu-planning/standardized-recipes">https://dpi.wi.gov/school-nutrition/program-requirements/menu-planning/standardized-recipes</a></p>
Start of the school year and as needed	<p><b>Post <a href="#">Reimbursable Meal Signage</a></b></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.  <a href="https://dpi.wi.gov/school-nutrition/program-requirements/menu-planning/signage">https://dpi.wi.gov/school-nutrition/program-requirements/menu-planning/signage</a></p>
Continuous as products change or new offerings are added	<p><b>Complete <a href="#">Smart Snacks Documentation</a></b></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. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/smart-snacks">https://dpi.wi.gov/school-nutrition/program-requirements/smart-snacks</a></p> <p>Use the <a href="#">Smart Snacks Product Calculator</a> to determine if a product is compliant. <a href="https://foodplanner.healthiergeneration.org/calculator/">https://foodplanner.healthiergeneration.org/calculator/</a></p>

<p><b>Continuous as products change or new menu items are added</b></p>	<p><b>Document <a href="#">Buy American Non-Compliant Products</a></b></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.  <a href="https://dpi.wi.gov/school-nutrition/program-requirements/procurement/buy-american">https://dpi.wi.gov/school-nutrition/program-requirements/procurement/buy-american</a></p>
<p><b>Complete monthly prior to each claim</b></p>	<p><b>Complete an <a href="#">Edit Check</a></b></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. <a href="https://dpi.wi.gov/school-nutrition/program-requirements/claiming">https://dpi.wi.gov/school-nutrition/program-requirements/claiming</a></p> <p>A <a href="#">Manual Edit Check Form</a> can be found online. <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/monthly-edit-check.docx">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/monthly-edit-check.docx</a></p> <p>An <a href="#">Electronic Edit Check for SFAs Operating CEP</a> can be found online. <a href="http://dpi.wi.gov/sites/default/files/imce/school-nutrition/xls/cep-editcheck.xlsx">http://dpi.wi.gov/sites/default/files/imce/school-nutrition/xls/cep-editcheck.xlsx</a></p>
<p><b>Monthly</b></p>	<p><b>Submit Monthly Reimbursement Claim</b></p> <p>The <a href="#">Claim Manual</a> provides step by step instructions. <a href="https://dpi.wi.gov/sites/default/files/imce/school-nutrition/site-based-claiming-manual.pdf">https://dpi.wi.gov/sites/default/files/imce/school-nutrition/site-based-claiming-manual.pdf</a></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 <a href="mailto:jacqueline.darrow@dpi.wi.gov">jacqueline.darrow@dpi.wi.gov</a>. 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 15<sup>th</sup> 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
<b>Annual USDA Foods Order Survey</b> SFAs use entitlement to order USDA Foods for the next school year. Submit to DPI via <a href="https://dpi.wi.gov/nutrition/online-services">Online Services, USDA Foods Ordering System</a> ( <a href="https://dpi.wi.gov/nutrition/online-services">dpi.wi.gov/nutrition/online-services</a> ).	February/March (exact dates emailed to SFA's primary contact in January)
<b>Delivery of USDA Foods</b> 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 <a href="https://dpi.wi.gov/nutrition/online-services">Online Services, USDA Foods Ordering System</a> ( <a href="https://dpi.wi.gov/nutrition/online-services">dpi.wi.gov/nutrition/online-services</a> ).	March 31
<b>USDA Foods Inventory Management and Monitoring</b> SFAs plan to use the pounds and cases in the school year products are distributed.	Monthly
<b>USDA Foods Fair Share/Bonus Surplus Order</b> SFAs submit orders to DPI via <a href="https://dpi.wi.gov/nutrition/online-services">Online Services, USDA Foods Ordering System</a> ( <a href="https://dpi.wi.gov/nutrition/online-services">dpi.wi.gov/nutrition/online-services</a> ).	Depending on availability (opportunities are emailed to SFA's primary contact)
<b>USDA Foods Invoices for Fees</b> Review the monthly USDA Foods invoice in <a href="https://dpi.wi.gov/nutrition/online-services">Online Services, USDA Foods Ordering System</a> and compare to fees deducted from monthly reimbursement claims ( <a href="https://dpi.wi.gov/nutrition/online-services">dpi.wi.gov/nutrition/online-services</a> ).	Monthly

Please email [dpifns@dpi.wi.gov](mailto:dpifns@dpi.wi.gov) or call 608-267-9228 with any questions regarding the school nutrition programs.

This institution is an equal opportunity provider.