

Annual Requirements for Provision 2 Base Year Schools Participating in USDA Child Nutrition Programs

To ensure program compliance, please distribute a copy of this calendar to each staff person responsible for completing the following tasks related to the National School Lunch Program (NSLP) and School Breakfast Program (SBP) operation. Base year records must be retained by the School Food Authority (SFA) during the period Provision 2 is in effect, including all extensions. Additionally, such records must be retained for three years after submission of the final claim for reimbursement for the last fiscal year which used the base year data.

Requirement	Due Date	Initials	Date Completed
<p>USDA Child Nutrition Program Online Contract</p> <p>Update/renew the USDA Child Nutrition Program contract with DPI (https://dpi.wi.gov/school-nutrition/program-requirements/contracts). The contract must be updated before each school year. The school year is defined as July 1 – June 30. Actual approval of contracts will not begin until after the DPI system roll-over in July. For specific guidance on summer school dates, please reference the contract manual. The contract manual can be found online (http://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/contract-manual.pdf).</p>	<p>Portal opens beginning of May</p> <p>Due by May 31</p>		
<p>Food Service Management Company, Vended Meals, or Joint Agreement () N/A</p> <p>Submit new Food Service Management Company (FSMC) contract, Vended Meals Agreement, or Joint Agreement (including any applicable renewals) to DPI. DPI must approve the agreements before the online contract will be approved.</p> <p>Before entering into a Food Service Management Company contract, SFAs are required to use a Request for Proposal (RFP) DPI template (either fixed price or cost reimbursable) (https://dpi.wi.gov/school-nutrition/program-requirements/procurement). The RFP process requires DPI approval at multiple steps and can take an average of three months to complete. Contact Deb Wollin at debra.wollin@dpi.wi.gov or 608-267-3724 for additional information and approval.</p> <p>The DPI templates for Vended Meals Agreement or Joint Agreement must be used (https://dpi.wi.gov/school-nutrition/program-requirements/procurement). For Vended Meals Agreements, a copy of vendor's current restaurant license must also be submitted to DPI.</p>	<p>By June 30</p> <p>Upload the upcoming school year's signed vended meals or joint agreement into the Child Nutrition Program Online Contract, if applicable.</p> <p>Email, mail, or fax the completed FSMC contract to DPI, if applicable.</p>		
<p>Free and Reduced Price Meal Application</p> <p>Print current applications for free and reduced price meals/free milk from DPI's Provision 2 Base Year website and update with the school's information. Distribute between July 1 and the beginning of the school year to <u>ALL</u> households (unless household is certified free through Direct Certification prior to distributing applications). The Provision 2 Free and Reduced Price Meal application materials include an updated prototype application, instructions, parent notification letter, notice of direct certification letter, and other related forms (https://dpi.wi.gov/school-nutrition/special-provision-options/provision-2). Process completed applications within ten (10) operating days after the date of receipt. Send notification to households with students who are eligible for free or reduced price meals and to households that are denied benefits. Determining Official (DO) must sign and date all applications. File all approved and denied applications at the SFA, along with any other documentation supporting eligibility of benefits.</p>	<p>After July 1 and before the start of the school year.</p> <p><i>Must use modified templates on the Provision 2 website.</i></p>		

Requirement	Due Date	Initials	Date Completed
<p>If the 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 listing is updated annually. Remember, the application for the upcoming school year cannot be posted or distributed prior to July 1.</p>			
<p>Direct Certification (DC)</p> <p>Run DC for the first time with the full student enrollment for the entire SFA. Keep the original matched list(s) on file. Send notification to households of students that are categorically eligible for free or reduced meals. Prototype DC letters are posted online at the Provision 2 webpage (https://dpi.wi.gov/school-nutrition/special-provision-options/provision-2).</p> <p>SFAs are required to run DC, with total enrollment, a minimum of three times per school year: once at the beginning of the school year, three months after first run, and six months after first run, per USDA SP 31-2011. In addition to the three minimum DC runs required by USDA, a DC run with total student enrollment by school code must be completed on or before April 1 to reflect enrollment information on April 1. This data is compiled for a USDA report and used to determine which schools qualify for CEP.</p> <p>SFAs are encouraged to run DC more frequently and when new students enter the district. The matching database is updated weekly. Maintain all original DC match lists at the SFA as paper copies or electronically. Additional Direct Certification resources can be found online (https://dpi.wi.gov/school-nutrition/program-requirements/direct-certification).</p>	<p><i>First Run:</i> At or near beginning of school year (July – August)</p> <p><i>Second Run:</i> Three months after first run (October – December)</p> <p><i>Third Run:</i> Six months after first run (January – March)</p> <p><i>April 1 Run:</i> If third run is not completed near April 1, a fourth run close to or on April 1 must be completed</p>		
<p>Benefit Issuance List (BI)</p> <p>From benefit documentation (which includes Free and Reduced Price Meal applications, DC lists, documentation designating students as homeless by the school district’s homeless liaison, documentation designating students as migrant by state migrant coordinator, and any additional documentation for foster, runaway, and Head Start students), create and maintain a benefit issuance list noting the student’s name, benefit status, specific date of qualification, benefit type/source (i.e., DC or application).</p> <p>An example benefit issuance list can be found online (https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/beniss_ex.pdf).</p>	<p>Prior to start of school year</p> <p>Updates should be made throughout the year as new benefit documentation is received, as new students arrive, and/or when benefits change due to verification.</p>		
<p>Public Release</p> <p>Send the modified Provision 2 base year public release for free meals to local media and grassroots organizations that reach minority or under-represented groups. SFAs are required to send the public release to local media and community grassroots organizations but are not required to pay to have it published. 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. Additional Provision 2 Guidance from USDA can be found online (http://www.fns.usda.gov/sites/default/files/Prov2Guidance.pdf).</p>	<p>Prior to start of school year</p>		

Requirement	Due Date	Initials	Date Completed
Food Safety Plan Conduct annual review of school-level food safety plan(s) and include any necessary updates (https://dpi.wi.gov/school-nutrition/program-requirements/food-safety). Recommend scheduling staff and volunteer training on food safety.	Prior to start of school year		
And Justice for All Poster Display an <i>And Justice for All</i> poster in a publicly visible and readable area where the program is administered. If new or additional posters are needed, please contact the DPI SNT at 608-267-9228.	Prior to start of school year		
Food Service Annual Financial Report (AFR) Complete and submit the Food Service Annual Financial Report for the prior fiscal year (July 1 – June 30) (https://dpi.wi.gov/school-nutrition/program-requirements/reporting). The October lunch claim cannot be entered online until the Food Service Annual Financial Report is submitted.	Portal opens first week of July Due by August 31		
Wisconsin School Day Milk Program Claim () N/A Submit the Wisconsin School Day Milk Program (WSDMP) claim to DPI for the prior school year (https://dpi.wi.gov/school-nutrition/program-requirements/claiming). The October lunch claim cannot be entered online until the WSDMP claim is submitted. Additional WSDMP claim resources can be found online (https://dpi.wi.gov/school-nutrition/programs/milk-programs/wisconsin-school-day-milk).	By August 31		
Elderly Nutrition Program Claim () N/A Submit the Elderly Nutrition (EN) Program claim to DPI for the prior school year (https://dpi.wi.gov/school-nutrition/program-requirements/claiming). The October lunch claim cannot be entered online until the EN claim is submitted.	By August 31		
Afterschool Snack Program () N/A Complete Afterschool Snack Program On-site Monitoring form and keep on file at the SFA (https://dpi.wi.gov/school-nutrition/programs/afterschool-snack).	Two reviews each school year (first review within first four weeks of snack service)		
Civil Rights Training Complete the annual Civil Rights Training for staff involved with USDA Child Nutrition Programs (https://dpi.wi.gov/school-nutrition/program-requirements/civil-rights). The prototype training is updated yearly and available with an attendance log. Maintain a copy of the training and attendance log at the SFA.	Around the beginning of the school year		
Civil Rights Compliance Self-Evaluation (PI-1441) Complete the Civil Rights Compliance Self-Evaluation form and keep on file at the SFA (https://dpi.wi.gov/sites/default/files/imce/forms/doc/f1441.doc).	By October 31		
Verification - Start verification process. <ul style="list-style-type: none"> Verifying Official determines how many free and reduced price meal applications were APPROVED on or before October 1, calculates how many free and reduced price meal applications need to be verified, and selects verification sample from the pool of applications that were APPROVED on or before October 1. 	On or after October 1 Guidance to SFAs for beginning Verification <u>before</u> October 1 can be found in USDA memo SP42-2017 (https://www.fns.usda.gov/school		

Requirement	Due Date	Initials	Date Completed
<ul style="list-style-type: none"> Confirming Official conducts confirmation review on the free and reduced price meal applications that were selected for verification only, signs, and dates the bottom of the application. Verifying Official sends letters to households selected for verification (template “We MUST CHECK your application” letter is on DPI Provision 2 website). <p>Additional Verification resources, including a verification tracker form, can be found online (https://dpi.wi.gov/school-nutrition/program-requirements/verification).</p>	-meals/beginning-verification-october-1-guidance-local-educational-agencies).		
<p>Verification – Verifying Official reviews verification materials.</p> <ul style="list-style-type: none"> Review documents submitted by each household selected for verification. Follow-up with any household that did not respond to verification request. Send letter to households selected for verification to let them know the results (template “We HAVE CHECKED your application” letter is on DPI Provision 2 website). Submission of Verification Collection Report (VCR) is recommended at the conclusion of verification activities. The VCR is due February 1. <p>Additional Verification resources, including a verification tracker form, can be found online (https://dpi.wi.gov/school-nutrition/program-requirements/verification).</p>	Between October 1 and November 15		
<p>Verification – Update benefits on Benefit Issuance list using specific dates.</p> <p>Make any necessary benefit changes as a result of verification on the benefit issuance list and in point of service (POS) system.</p>	Upon completion of verification		
<p>FNS-10 Report</p> <p>The FNS-10 Report includes enrollment data and the number of approved free and reduced students as of the last day lunch was served in October (https://dpi.wi.gov/school-nutrition/program-requirements/reporting). The October lunch claim cannot be entered online until FNS-10 data is submitted to DPI.</p>	<p>Portal opens November 1</p> <p>October claim for reimbursement cannot be submitted until the report is complete.</p>		
<p>FNS-828 Paid Lunch Price Report (PLP)</p> <p>Submit the Paid Lunch Price Report to DPI (https://dpi.wi.gov/school-nutrition/program-requirements/reporting). 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). Submission of this report is required even if non-pricing. Report 0.00 for the dollar value. SFAs that do not have the specified grade level should use the dropdown to select N/A.</p>	<p>Portal opens November 1</p> <p>Report due November 15</p> <p>October claim for reimbursement cannot be submitted until the report is complete.</p>		
<p>FNS-742 Verification Collection Report (VCR)</p> <p>The FNS-742 VCR report can be submitted any time between November 1 and February 1 (https://dpi.wi.gov/school-nutrition/program-requirements/verification). Please note, the verification process is required to be completed by November 15. Verification materials and results should be filed at the SFA.</p>	<p>Portal opens November 1</p> <p>Report due February 1</p>		

Requirement	Due Date	Initials	Date Completed
<p>On-site Monitoring Form () N/A Complete On-site Monitoring Form for breakfast (https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/sbp-onsite-monitoring.doc) and On-site Monitoring Form for lunch (http://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/nslp-onsite-monitoring.doc). Keep on file at school (ONLY for schools that have more than one location where meals are served designated on the online contract with DPI). A minimum of 50% of schools participating in the SBP must also be monitored annually by February 1, with each school operating the SBP being monitored at least once every two years. Complete monitoring visits and document results, including any follow up, for all sites by February 1 annually.</p>	By February 1		
<p>Summer Food Service Program (SFSP) Outreach All SFAs operating NSLP are 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 or not SFSP is offered by the SFA itself. Acceptable outreach activities may include developing and distributing printed and electronic materials that provide information on the availability and location of summer meals to families of school children prior to the end of the school year.</p> <p>SFAs may distribute information through means normally used to communicate with households of enrolled children. For example, a link to the SFSP site map could be included in a spring parent newsletter. Additional information can be found on the Administrative Review webpage and the SFSP Find a Summer Meals Site webpage (https://dpi.wi.gov/school-nutrition/administrative-review; https://dpi.wi.gov/community-nutrition/sfsp/find-summer-meals-site).</p>	Prior to end of the school year		
<p>Professional Standards Complete and log appropriate number of required Professional Standards training hours for all school nutrition program staff and non-school nutrition program staff with job duties pertaining to school nutrition programs (https://dpi.wi.gov/school-nutrition/program-requirements/professional-standards).</p>	By June 30 Ongoing documentation is recommended.		
<p>Local Wellness Policy (LWP) Information on the LWP content requirements can be found online (https://dpi.wi.gov/school-nutrition/program-requirements/local-wellness-policy).</p> <ul style="list-style-type: none"> SFAs must annually notify the public regarding policy content. Assessment and evaluation of this policy is required at least every 3 years. The first assessment must be completed no later than June 30, 2020. 	Annually notify public Recommended to review annually. Required to assess, at a minimum, triennially (every 3 years) with the first assessment completed no later than June 30, 2020.		

Daily and Monthly Requirements for Provision 2 Base Year Schools Participating in USDA Child Nutrition Programs

Requirement	Due Date
Complete daily menu production records (https://dpi.wi.gov/school-nutrition/program-requirements/menu-planning). Production records are required by USDA , but there is no required standardized format. Production records should document what is prepared and served for each meal program (daily production plans, standardized recipes, Child Nutrition Labels or Product Formulation Statements). Maintain production records at SFA for three (3) years plus the current school year.	Complete daily
Complete and review Daily Participation Edit Check prior to submission of claim for reimbursement. Obtain daily meal counts for each school listed on Schedule A of 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 manual edit check form can be found online (https://dpi.wi.gov/school-nutrition/program-requirements/claiming).	Complete daily, review monthly
Submit monthly claim for reimbursement to DPI via Online Services. 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. SFAs blocked from submitting claims electronically should submit the claim on paper before the monthly deadline (see chart below). Fax or e-mail claim to Jacqueline Jordee before the deadline at 608-267-9207 or jacqueline.jordee@dpi.wi.gov	Monthly

60 Calendar Day Cut-off Deadlines for Submitting Claims for Reimbursement

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. 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/Postmark 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)

USDA Foods Distribution Program

For additional information and key dates relating to the USDA Foods Distribution Program, please review the [USDA Foods Program Timelines](https://dpi.wi.gov/school-nutrition/usda/timelines) resource (<https://dpi.wi.gov/school-nutrition/usda/timelines>).

Information	Due Date	Submit to DPI/File at SFA
Annual USDA Foods Order Survey Order USDA Foods for the entire upcoming school year.	Late winter (exact dates provided to all School Food Authorities in mailing from DPI USDA Foods Team)	Submit to DPI annually (https://www3.dpi.wi.gov/FDP/Login.aspx)
USDA Foods Fair Share/Bonus Surplus Order	Offered monthly, pending availability	Submit to DPI monthly via online services (https://dpi.wi.gov/nutrition/online-services)
USDA Foods Invoice for Total Fees Due Review the monthly USDA Foods invoice and compare to fees deducted from monthly reimbursement claims.	Available monthly online	Review invoice and file at SFA (https://www3.dpi.wi.gov/FDP/Login.aspx)

[Provision 2 Information](#)
<https://dpi.wi.gov/school-nutrition/special-provision-options/provision-2>

[Wisconsin Department of Public Instruction](#)
<http://dpi.wi.gov/school-nutrition>

[Online Services](#)
<http://dpi.wi.gov/nutrition/online-services>

[School Nutrition Team Personnel Directory](#)
<http://dpi.wi.gov/school-nutrition/directory>

[Child Nutrition Reports](#)
<https://dpi.wi.gov/school-nutrition/program-requirements/reporting>

At a Glance... Requirements for Provision 2 Base Year Only Schools Participating in USDA Child Nutrition Programs

Annual Requirements	Due Date	Initials	Date
USDA Child Nutrition Program Online Contract	By May 31		
Vended Meals or Joint Agreement () N/A	Must be uploaded before online contract can be approved		
Food Service Management Company () N/A	Must be approved before online contract can be approved		
Direct Certification	First run: At or near beginning of school year (July – September)		
Benefit Issuance List	Prior to start of school year and as needed throughout as new documentation is received		
Public Release	Prior to start of school year		
Food Safety Plan	Prior to start of school year		
<i>And Justice for All</i> Poster	Prior to start of school year		
Food Service Annual Financial Report	By August 31		
Wisconsin School Day Milk Program Claim () N/A	By August 31		
Elderly Nutrition Program Claim () N/A	By August 31		
Afterschool Snack Program On-site Monitoring () N/A	Two reviews each school year (first review within first 4 weeks of snack service)		
Civil Rights Training	Around the beginning of the school year		
Verification - start verification process	On or after October 1		
Verification - review verification materials	Between October 1 and November 15		
Verification - update benefits per verification outcome(s)	Upon completion of verification		
Civil Rights Compliance Self-Evaluation (PI-1441)	By October 31		
Direct Certification	Second run: 3 months after initial effort (October – December)		
FNS-10 Report	November 1		
FNS-828 Paid Lunch Price Report	November 1		
FNS-742 Verification Collection Report (VCR)	By February 1		
On-site Monitoring Form () N/A	By February 1		
Direct Certification	<ul style="list-style-type: none"> • Third run: 6 months after initial effort (January – March); • Fourth run: At the end of March, or on April 1 at the latest 		
Summer Food Service Program (SFSP) Outreach	Prior to the end of the school year		
Professional Standards	By June 30		
Local Wellness Policy	Annually review and notify the public, triennially assess		

Daily and Monthly Requirement	Due Date
Daily Production Records	Complete daily
Daily Participation Edit Check	Complete daily, review monthly
Submit Monthly Claim for Reimbursement	Monthly