

Requirement	Due Date	Initials	Date Completed
<p>2. If your SFA is operating SSO for the 2021-22 SY, you have completed the PLE survey and had a negative, zero or positive balance for the Nonprofit School Food Service Account (Fund 50) as of December 31, 2020, you do not need to complete the PLE tool.</p> <p>PLE requirements are subject to change annually depending on USDA guidance, as it is released. For this reason, PLE requirements for the SY 2022-23 may differ from SY 2021-22.</p>	<p>school year paid meal prices are being determined for).</p>		
<p>Free and Reduced Price Meal Applications (Applicable for SSO and NSLP)</p> <p>If operating SSO, school meal applications must be available as needed to certify children for free and reduced price meals. A student's free and reduced price meal eligibility is not required for free school meals in SSO, but establishes eligibility for other purposes, such as state reporting, Wisconsin School Day Milk Program, and P-EBT.</p> <p>Print current applications for free and reduced price meals/free milk from DPI's 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 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/program-requirements/free-reduced-meal-eligibility) 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. The 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 and retain for three years plus the current school year.</p> <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 list is updated annually. Remember, the application for the upcoming school year cannot be posted or distributed prior to July 1.</p>	<p>After July 1 and before the start of the school year.</p>		
<p>Direct Certification (DC) (Applicable for SSO and NSLP)</p> <p>Conduct a full-enrollment DC run for the first run of the school year. Keep the original matched file, securely, in paper or electronic format, for three years plus the current school year. (https://dpi.wi.gov/school-nutrition/program-requirements/direct-certification)</p> <p>Send notification letters to households of students that are categorically eligible for free or reduced price meals. Prototype DC letters are available on the Free and Reduced Price Meal application webpage. (https://dpi.wi.gov/school-nutrition/program-requirements/free-reduced-meal-eligibility)</p> <p>SFAs are required to conduct a full enrollment DC run 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 full-</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>		

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<p>enrollment DC must be completed on or before April 1 to reflect enrollment information on April 1. This data is compiled for a USDA report and is 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.</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) (Applicable for SSO and NSLP)</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 BI list noting the student’s name, benefit status, specific date of qualification, benefit type/source (i.e., DC or application).</p> <p>For SFAs operating SSO, the individual student eligibility reflected on the BI list should be the most current eligibility information available from 2019-20, 2020-21 or 2021-22.</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>Unpaid Meal Charge Policy (Applicable for SSO and NSLP)</p> <p>The most current version of the SFA’s Unpaid Meal Charge Policy must be 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 also be provided in writing to any households transferring to the SFA during the school year. Note that only posting the policy to the school website does not meet this requirement.</p> <p>The policy must also be provided in writing to all school or SFA-level staff who are responsible for policy enforcement. It is recommended to also provide the policy information to principals and other school or district administrators to ensure the policy is supported.</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>For SSO, students are not charged for reimbursable meals, but we do highly recommend that the Unpaid Meal Charge Policy be distributed as this is likely the best way to communicate to families that there is a charge for a non-reimbursable meal and a la carte.</p> <p>Unpaid Meal Charge Policy Resources can be found online (https://dpi.wi.gov/school-nutrition/program-requirements/financial-management).</p>	<p>Prior to the start of school year</p> <p>Recommend to review and update regularly, such as annually.</p>		
<p>Public Release (Applicable for SSO, NSLP and SMP)</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. In addition, SFAs should send the release to major employers contemplating or experiencing large layoffs and local unemployment offices, as applicable.</p>	<p>Prior to start of school year</p>		

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<p>Public Releases are located on the SNT website Free and Reduced Meal Eligibility webpage. For SFAs operating SSO, a modified version is available. (https://dpi.wi.gov/school-nutrition/program-requirements/free-reduced-meal-eligibility) There is also a Public Release for SFAs Operating as a Mixed District with CEP available. (https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/cep-mixed-district-public-release.doc) There is also a Public Release for SFAs Operating Special Milk Program (SMP) Pricing Plan-Free Milk Option available for SFAs participating the SMP. (https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/smp-public-release.docx)</p> <p>At the SFA, maintain a copy of the materials sent and a list of to whom the materials were sent.</p>			
<p>And Justice for All Poster (Applicable for SSO and NSLP)</p> <p>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.</p> <p>Per USDA Memorandum SP 14-2020, the <i>And Justice for All (AJFA)</i> poster must be prominently displayed at all facilities and locations that distribute meals, which includes meal pick-up locations for students learning virtually. Meals delivered from stationary vans or buses should display the AJFA poster. For vehicles making door-to-door drop deliveries at homes and businesses, the AJFA poster does not need to be displayed. Please email dpifns@dpi.wi.gov to request AJFA posters.</p> <p>Per USDA Memorandum SP 24-2020, the AJFA poster does not need to be displayed in each classroom, but should be prominently displayed throughout the school in an area that is frequently visited by parents and students.</p>	Prior to start of school year		
<p>Food Safety Plan (Applicable for SSO and NSLP)</p> <p>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) SNT recommends scheduling staff and volunteer training on food safety before the start of the school year.</p>	Prior to start of school year		
<p>Food Service Annual Financial Report (AFR) (Applicable to SSO and NSLP)</p> <p>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.</p>	Portal opens first week of July Due by August 31		
<p>Afterschool Snack Program () N/A</p> <p>Complete Afterschool Snack Program Onsite Monitoring Form and keep on file at the SFA. (https://dpi.wi.gov/school-nutrition/programs/afterschool-snack)</p>	Two reviews each school year (first review required within first four weeks of snack service)		
<p>Civil Rights Training (Applicable for SSO and NSLP)</p>	Around the beginning of the school year for all food service staff and employees working with the school meal programs.		

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<p>Complete the annual Civil Rights Training for staff involved with USDA Child Nutrition Programs. (https://dpi.wi.gov/school-nutrition/program-requirements/civil-rights) Maintain a copy of the training and attendance log at the SFA. For SSO, use the most current information available.</p>			
<p>Civil Rights Compliance Self-Evaluation (PI-1441) (Applicable for SSO and NSLP)</p> <p>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)</p>	By October 31		
<p>Verification – Start verification process. (Applicable for NSLP and SFAs operating SSO who receive and process applications as of October 1)</p> <p>Per USDA Memorandum SP 15-2021, Q30 SFAs that collect household applications in SY 2021-2022 are required to conduct verification, regardless of the reason the applications were collected and/or the Child Nutrition Program they are operating. The sample size used to conduct verification activities must be based on the number of approved applications on file as of October 1, 2021. The outcome of verification will not impact a student’s ability to be provided a meal at no charge. Since school meal applications are used to establish eligibility for P-EBT, state reporting and Wisconsin School Day Milk Program, verification is still necessary and required.</p> <p>***Note: Mixed CEP districts MUST conduct verification on the non-CEP sites (those accepting F/R applications) within the district.</p> <ul style="list-style-type: none"> • Verifying Official determines how many free and reduced price meal applications were APPROVED on or before October 1 (carryover applications should not be included), 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. • 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 website). <p>Additional Verification Resources, including a verification tracker form, can be found online. (https://dpi.wi.gov/school-nutrition/program-requirements/verification)</p>	<p>On or after October 1</p> <p>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-meals/beginning-verification-october-1-guidance-local-educational-agencies)</p>		
<p>Verification – Verifying Official reviews verification materials. (Applicable for NSLP and SFAs operating SSO who receive and process applications as of October 1)</p> <ul style="list-style-type: none"> • Additional Verification Resources, including a verification tracker form, can be found Review documents submitted by each household selected for verification. Follow-up with any households that did not respond to verification request. (https://dpi.wi.gov/school-nutrition/program-requirements/verification) 	Between October 1 and November 15		

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<ul style="list-style-type: none"> Send letter to households selected for verification to let them know the results (template “We HAVE CHECKED your application” letter is on DPI website). Submission of Verification Collection Report (VCR) is recommended at the conclusion of verification activities. Portal opens November 1. The VCR is due February 1. 			
<p>Verification – Update benefits on Benefit Issuance list using specific dates. (Applicable for NSLP and SFAs operating SSO who receive and process applications as of October 1)</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 (Applicable for SSO and NSLP)</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. FNS-10 Manual updated to include instructions for SSO.</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) (Applicable for SSO and NSLP)</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). <i>Submission of this report is required even if non-pricing.</i> The PLP Instruction Manual has been updated with guidance for SSO. (https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/paid-lunch-price-report-instructions.pdf)</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) (Applicable for SSO and NSLP)</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>If your SFA did not receive any USDA Free and Reduced-Price Meal Applications as of October 1, 2021, the verification process is not required, but the VCR does still need to be submitted. In this case, to submit the VCR, complete sections 1-3, section 4 will be all zeros to show no applications were on file as of October 1 and since your SFA is exempt from the verification process, mark 5-1 for section 5 and submit.</p>	<p>Portal opens November 1</p> <p>Report due February 1</p>		
<p>Onsite Monitoring Form (Applicable for SSO and NSLP)</p> <p>If operating SSO: Under the USDA COVID-19: Child Nutrition Response #94, SFAs operating the SSO have the ability to waive the on-site monitoring requirements for SY 2021-22. (https://www.fns.usda.gov/cn/child-nutrition-response-94) If elected, SFAs should continue monitoring activities of program operations offsite (e.g., through a desk audit). This waiver was included in the Program Operations Application; no further action is required. Per USDA Memorandum SP 10-2021, Q12,</p>	By February 1		

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<p>all other on-site monitoring requirements are still in effect, including the requirement to complete on-site monitoring by February 1. (https://fns-prod.azureedge.net/sites/default/files/resource-files/COVID-19-Oversight-Reporting-Questions-Final.pdf)</p> <p>An SSO Onsite Monitoring Form is available to better align with program operations under SSO. (https://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/sso-monitoring-review-form.docx) This form can be used for both breakfast and lunch monitoring. USDA has created Offsite Monitoring Fact Sheets for Child Nutrition Programs for additional guidance and best practices. (https://www.fns.usda.gov/cn/site-monitoring-fact-sheets-child-nutrition-programs) More Information on onsite monitoring is located on our website Here. (https://dpi.wi.gov/school-nutrition/program-requirements/on-site-monitoring)</p>			
<p>Summer Food Service Program (SFSP) Outreach (Applicable for SSO and NSLP)</p> <p>All SFAs 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 (Applicable for SSO and NSLP)</p> <p>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		
<p>Local Wellness Policy (LWP) (Applicable for SSO and NSLP)</p> <p>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. • Recommend to review annually for updates. • Assessment and evaluation of LWP is required at least every 3 years. • SFAs must also make the assessment available to the public. 	<p>Notify the public of annual policy content and of triennial assessment when completed.</p> <p>By June 30, 2021, should have completed the triennial assessment of the local wellness policy</p>		

Daily and Monthly Requirements for USDA Child Nutrition Programs

Requirement	Due Date
<p>Complete Daily Menu Production Records. <i>(https://dpi.wi.gov/school-nutrition/program-requirements/menu-planning)</i> 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.</p>	<p>Complete daily</p>
<p>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. <i>(https://dpi.wi.gov/school-nutrition/program-requirements/claiming)</i></p> <p>An Electronic Edit Check for SFAs Operating CEP can be found online. <i>(http://dpi.wi.gov/sites/default/files/imce/school-nutrition/xls/cep-editcheck.xlsx)</i>.</p> <p>SFAs operating SSO are exempt from completing an edit check, however, SFAs must ensure that meal counts match actual participation and claims reflect the number of meals served.</p>	<p>Complete daily, review monthly</p>
<p>Submit monthly claim for reimbursement to DPI via Online Services. Utilize the applicable claim manual for SSO or NSLP. <i>(SSO: https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/sso-claiming-manual.pdf NSLP: https://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/site-based-claiming-manual.pdf)</i> 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 electronically should submit the claim manually 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.</p>	<p>Monthly</p>

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

Claims for reimbursement for meals/milk served under the SSO, 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](#) 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 <i>(https://www3.dpi.wi.gov/FDP/Login.aspx)</i>
USDA Foods Fair Share/Bonus Surplus Order	Offered monthly, pending availability	Submit to DPI monthly via Online Services <i>(https://dpi.wi.gov/nutrition/online-services)</i>
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 <i>(https://www3.dpi.wi.gov/FDP/Login.aspx)</i>

USDA Child Nutrition Programs Requirements...

Annual Requirements	Due Date	Initials	Date
USDA Child Nutrition Program Online Contract	By June 11		
Vended Meals or Memorandum of Understanding () 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		
Free and Reduced Price Meal Applications	Released by USDA in June. Do not distribute until after July 1.		
Direct Certification (run with full enrollment)	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		
Unpaid Meal Charge Policy	Distribute prior to start of school year, review regularly		
Public Release	Prior to start of school year		
Food Safety Plan	Prior to start of school year		
And Justice for All Poster	Prior to start of school year		
Food Service Annual Financial Report	Due by August 31		
Afterschool Snack Program On-site Monitoring () N/A	Two reviews each school year with first review in first 4 weeks		
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 (run with full enrollment)	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 (run with full enrollment)	<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

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**Wisconsin Department of
Public Instruction**

[http://dpi.wi.gov/school-
nutrition](http://dpi.wi.gov/school-nutrition)

Online Services

[http://dpi.wi.gov/nutrition/online-
services](http://dpi.wi.gov/nutrition/online-services)

Child Nutrition Reports

[https://dpi.wi.gov/school-
nutrition/program-
requirements/reporting](https://dpi.wi.gov/school-nutrition/program-requirements/reporting)