

Annual Requirements for the USDA Special Milk Program

This is not for schools that also operate the National School Lunch Program.

To ensure program compliance please distribute a copy of this calendar to each staff person responsible for completing the following tasks related to the operation of the Special Milk Program (SMP). All required program related materials must be retained by the School Food Authority (SFA) for three (3) years plus the current year of operation for audit compliance. **Please note, this calendar is for schools which only operate the SMP.**

Requirement	Due Date	Initials	Date
<p>USDA Special Milk Program Online Contract Update/renew the USDA SMP contract with DPI (http://dpi.wi.gov/school-nutrition/milk-programs/special-milk). The contract must be updated before each school year. The “end date” for programs submitted on the contract must include summer school dates, if any. Actual approval of contracts will not begin until after the DPI system roll-over in July. The contract manual can be accessed at http://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/smp-contract-manual.pdf.</p>	By May or June – refer to annual DPI memo for exact date		
<p>Purchasing Meet federal procurement (purchasing) requirements by documenting efforts to maximize open and free competition. SFAs must document informal procurement attempts to obtain a minimum of three price quotations if annual purchases for SMP are under the small purchase threshold (less than \$150,000). A log for informal procurement can be found at http://dpi.wi.gov/sites/default/files/imce/school-nutrition/doc/smp_log.doc. Formal procedures (Invitation for Bids or Requests For Proposal) may be used for any product and/or service that exceeds that threshold. Examples of solicitation documents for milk bids can be found at http://dpi.wi.gov/school-nutrition/procurement. SFAs may also utilize micro-purchasing for products or services if the transaction amount does not exceed \$3,500. Note, your SFA may have a lower threshold. Purchases costing less than the micro-purchase threshold can be awarded without soliciting competitive price quotations if the price is reasonable. To the extent practicable, purchases must be distributed equitably among qualified suppliers with reasonable prices. This distribution of purchases among qualified suppliers can happen in one of two ways: at the time of the purchase or over several purchasing events. For example, a school procuring milk may purchase them either:</p> <ul style="list-style-type: none"> •from various suppliers at the same time (the total of the purchases cannot exceed \$3,500) or •choose one supplier for the purchase of the milk and another supplier the next time milk needs to be purchased (each of the purchases cannot exceed \$3,500) <p>Ways to verify the reasonableness of a price is to compare previous purchases, have personal knowledge of the item being purchased, or compare to similar items being purchased. Records need to be kept for all purchases regardless of the procurement method used, including micro-purchases. An online procurement training series for SFAs can be found at http://dpi.wi.gov/school-nutrition/procurement/training and includes the following topics:</p> <ul style="list-style-type: none"> • Introduction to Procurement • Micro Purchase Method • Small Purchase Method <p>Fluid milk must be fat-free milk, low-fat (1%) milk, fat-free or low-fat lactose reduced milk, fat-free or low-fat lactose-free milk, fat-free or low-fat buttermilk, or fat-free or low-fat acidified milk. Milk may be flavored or unflavored, and there is no variety requirement.</p>	Prior to start of school year		

Annual Requirements for the USDA Special Milk Program (Continued)

Requirement	Due Date	Initials	Date
<p>Milk Pricing for Student (<i>Applicable to both Pricing Plan options</i>)</p> <p>Reimbursement should be maximized to reduce the cost of milk for students. It is recommended to charge a student the difference between the anticipated per half-pint milk cost and the reimbursement rate. An acceptable add-on to cover any milk price adjustments and administrative costs associated with the SMP program is \$0.02. Documentation needs to be maintained to justify milk price adjustments and administrative costs greater than \$0.02.</p> <p>Example: $\frac{1}{2}$ pint cost \$___ + 2¢ – reimbursement \$___ = \$___ $\frac{1}{2}$ pint price X 180 days = \$___ annual charge</p>	Prior to start of school year		
<p>Direct Certification (DC) (<i>Pricing Plan - free milk option only</i>)</p> <p>If operating the SMP program with a free milk option, run DC to qualify students for free milk benefits. For those students qualifying, send the DC notification letter, found in the Free Milk application packet (http://dpi.wi.gov/school-nutrition/milk-programs/special-milk), to the household promptly. It is not a requirement to run DC, but it is beneficial to help the SFA identify students for free milk benefits. The matching database is updated weekly. Maintain all original DC match lists at the SFA. DC resources can be accessed at http://dpi.wi.gov/school-nutrition/direct-certification.</p>	Recommended to run DC after July 1 and prior to the start of the school year (preferably before application distribution) and as needed throughout the school year to qualify additional students for free milk benefits		
<p>Free Milk Application (<i>Pricing Plan - free milk option only</i>)</p> <p>Print current application for free milk from DPI's website. Distribute at the beginning of the school year after July 1 to ALL households (excluding students found on Direct Certification prior to distribution). The Free Milk application packet includes an updated prototype application, parent notification letter, notice of direct certification letter, and other related forms and can be found at http://dpi.wi.gov/school-nutrition/milk-programs/special-milk/smp-pricing-free-milk-option. Process completed applications within ten (10) operating days after the date of receipt. Send notification to households with students who are eligible for free milk and to households that are denied benefits. File all approved and denied applications at the SFA, along with any other documentation supporting free milk eligibility.</p>	After July 1		
<p>Benefit Issuance List (<i>Pricing Plan - free milk option only</i>)</p> <p>From benefit documentation (which includes Free Milk applications, DC lists, documentation designating students as homeless by the public school district's homeless liaison, documentation designating students as migrant by migrant coordinator, and any additional documentation for foster or runaway students), create/maintain a benefit issuance list noting the student's name, benefit status, specific date of qualification, benefit type/source (i.e., DC or application). Remember, 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. Information on carryover benefits can be found in the Eligibility Manual for School Meals http://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/eligibility-manual-2016.pdf. An example benefit issuance list can be found at http://dpi.wi.gov/files/school-nutrition/pdf/beniss_ex.pdf.</p>	<p>Prior to start of school year</p> <p><i>Updates should be made throughout the year as new benefit documentation is received or as new students arrive</i></p>		

Annual Requirements for the USDA Special Milk Program (Continued)

Requirement	Due Date	Initials	Date
<p>Public Release (<i>Pricing Plan - free milk option only</i>) Send the public release for free milk to local media and grassroots organizations that reach minority or under-represented groups. SFAs are required to send the public release and maintain documentation of where it was sent to but are not required to pay to have it published. A template Special Milk Program public release is available on the DPI website at http://dpi.wi.gov/school-nutrition/milk-programs/special-milk/smp-pricing-free-milk-option.</p>	Prior to start of school year		
<p>Food Safety Develop and implement procedures for ensuring milk served by the SFA is wholesome by adhering to proper food safety practices. This includes maintaining temperature and cleaning logs for refrigeration units. Template logs can be found at http://dpi.wi.gov/school-nutrition/milk-programs/special-milk.</p>	Prior to start of school year		
<p>Local Wellness Policy (LWP) All SFAs must establish and implement a LWP. Assessment and evaluation of this policy is also required. More information on the LWP can be found at http://dpi.wi.gov/school-nutrition/wellness-policy.</p>	Recommended to review annually and assess, at a minimum, once every three years		
<p>Civil Rights Training Complete the annual Civil Rights Training for staff involved with the SMP. The SMP Civil Rights training is available at http://dpi.wi.gov/school-nutrition/milk-programs/special-milk, along with an attendance log. Maintain a copy of the training and attendance log at the SFA.</p>	Prior to start of school year		
<p>And Justice for All Poster Post the <i>And Justice for All</i> posters in publically visible and readable areas where the program is administered. If new or additional posters are needed, please contact the SNT at 608-267-9228.</p>	Prior to start of school year		
<p>Civil Rights Compliance Self-Evaluation Complete the SMP Civil Rights Compliance Self-Evaluation form (PI-1456) and keep on file at the SFA. The Civil Rights Compliance Self-Evaluation Form can be accessed at http://dpi.wi.gov/sites/default/files/imce/forms/doc/f1456.doc.</p>	By October 31		
<p>Financial Management Maintain detailed and accurate financial records of program revenues and expenditures. Revenues obtained through the SMP are only to be used for SMP purposes. The cash balance should not exceed three months operating costs unless the SFA has a plan for the accumulated balance (e.g., saving for a replacement refrigeration unit).</p>	Review internally at the end of the school year and as needed throughout the year		

Daily and Monthly Requirements for the USDA Special Milk Program

Requirement	Due Date
<p>Point of Service (POS) Obtain daily count of half-pints of milk (or half-pint equivalents) served to students at the POS for each school listed on Schedule A of the online contract. SFAs with the <i>Pricing Plan - Free Milk Option</i> must obtain daily counts by individual students at the POS to document the number of half-pints served to students approved for free milk and the number of half-pints served to students who are in the paid category. The POS system (i.e., manual roster or electronic system) used for SFAs with this option must protect the identity of students who qualify for free milk. SFAs with the <i>Non-Pricing Plan</i> (no student is charged) and <i>Pricing Plan – No Free Milk Option</i> (all students pay a set charge, and there is no free milk) may obtain a daily count at the POS for all milk served to students. Schools using these two plans may use daily count sheets or count the number half-pints distributed to students in the classroom at the point of service and record this count on a calendar. Template forms are available at http://dpi.wi.gov/school-nutrition/milk-programs/special-milk#smp-pos-templates. <i>All SFAs participating in SMP must implement procedures to disallow milk served to adults and milk used in cooking when submitting the monthly reimbursement claim.</i></p>	Completed daily, review monthly
<p>Monthly Claims 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 milk service in June. Please refer to the claiming calendar below for submission deadlines. Schools blocked from submitting claims using Online Services should submit the claim on paper before the monthly deadline (see chart below). Fax or email claim copy to Jacqueline Jordee before the deadline at 608-267-9207 or jacqueline.jordee@dpi.wi.gov.</p>	Monthly

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

Claims for reimbursement for milk served under the 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 2 weeks of June and the last 2 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

**Wisconsin Department of Public Instruction
Special Milk Program**

<http://dpi.wi.gov/school-nutrition/milk-programs/special-milk>

Online Services

<http://dpi.wi.gov/nutrition/online-services>

**School Nutrition Team
Personnel Directory**

<http://dpi.wi.gov/school-nutrition/directory>

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To file a program complaint of discrimination, complete the [USDA Program Discrimination Complaint Form](#), (AD-3027) found online at: http://www.ascr.usda.gov/complaint_filing_cust.html, and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

- (1) mail: U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410;
- (2) fax: (202) 690-7442; or
- (3) email: program.intake@usda.gov.

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At a Glance...USDA Special Milk Program Requirements

Annual Requirements	Due Date	Initials	Completed
USDA Child Nutrition Program Online Contract	By May or June – refer to annual DPI memo for exact date		
Purchasing	Prior to start of school year		
Milk Pricing for Students (applicable to both <i>Pricing Plan</i> options)	Prior to start of school year		
Direct Certification	After July 1, preferably before the beginning of school year and as needed throughout the year		
Free and Reduced Price Milk Applications (<i>Pricing Plan - free milk option only</i>)	After July 1		
Benefit Issuance List (<i>Pricing Plan - free milk option only</i>)	Prior to the start of the school year <i>Updates should be made throughout the year as new benefit documentation is received</i>		
Public Release (<i>Pricing Plan - free milk option only</i>)	Prior to start of school year		
Food Safety	Prior to start of school year		
Local Wellness Policy	Recommended to review annually and assess, at a minimum, once every three years		
Civil Rights Training	Prior to start of school year		
<i>And Justice for All</i> Poster	Prior to start of school year		
Civil Rights Compliance Self-Evaluation	By October 31		
Financial Management	Review internally at the end of the school year and as needed throughout the year		

Daily and Monthly Requirement	Due Date
Point of Service (POS)	Completed daily, review monthly
Monthly Claims	Monthly

WI DPI Special Milk Program
<http://dpi.wi.gov/school-nutrition/milk-programs/special-milk>

Online Services
<http://dpi.wi.gov/nutrition/online-services>

School Nutrition Team Personnel Directory
<http://dpi.wi.gov/school-nutrition/directory>