

**On-Site Review Checklist**  
 Assessment of the SFA's Meal Counting and Claiming System

According to USDA regulation, 7 CFR 210.8(a)(1), a School Food Authority (SFA) with two or more feeding sites is required to visit each site and complete the following checklist for each site that offers lunch and 50 percent of all sites that offer breakfast by **February 1** each year.

The on-site review must ensure the school's claim is based on the counting system, as implemented, and yields the actual number of reimbursable free, reduced and paid meals served for each day of operation. If the review discloses problems with a school's meal counting or claiming procedure, the SFA must ensure that the school implements corrective action. Within 45 days of the review, a follow-up on-site review must be conducted to determine that the corrective action resolved the problems. Completed checklists are to be kept on file at the school district or Residential Child Care Institution (RCCI).

**SFA:** \_\_\_\_\_ **Site:** \_\_\_\_\_ **Reviewer:** \_\_\_\_\_

Review Date: \_\_\_\_\_

Review Date: \_\_\_\_\_

**Breakfast**

Roster  Ticket  Electronic

Point of Service (POS) meal count method  
used at this site:

**Lunch**

Roster  Ticket  Electronic

|       |       | Point of Service (POS) meal count method used at this site: |  |                          |                          |  |  |                          |                          |                          |  |     |       |       |  |  |  |  |  |  |  |  |
|-------|-------|---|--|--------------------------|--------------------------|--|--|--------------------------|--------------------------|--------------------------|--|-----|-------|-------|--|--|--|--|--|--|--|--|
| YES   | NO    |   |  |                          |                          |  |  |                          |                          |                          |  | YES | NO    |       |  |  |  |  |  |  |  |  |
| _____ | _____ | 1.  | Is the POS meal count taken at the end of the serving line after all food items contributing to a reimbursable meal have been offered? (This includes the end of salad bars and/or food bars.) |                          |                          |  |  |                          |                          |                          |  |     | _____ | _____ |  |  |  |  |  |  |  |  |
| _____ | _____ | 2.  | If <u>no</u> , does the SFA have an approved waiver on file from NDE-Nutrition Services? If a waiver is not on file, contact Nutrition Services immediately.                                   |                          |                          |  |  |                          |                          |                          |  |     | _____ | _____ |  |  |  |  |  |  |  |  |
| _____ | _____ | 3.  | Is the POS meal count used to determine the school's meal count for the day and claim for reimbursement at the end of the month? (Morning meal counts or tray counts cannot be used.)          |                          |                          |  |  |                          |                          |                          |  |     | _____ | _____ |  |  |  |  |  |  |  |  |
| _____ | _____ | 4.  | Is the person who is responsible for the POS meal count correctly identifying reimbursable meals?  |                          |                          |  |  |                          |                          |                          |  |     | _____ | _____ |  |  |  |  |  |  |  |  |
|       |       | 5.  | Is the school correctly implementing policies for handling the following situations, if applicable (answer this question one time only):   |                          |                          |  |  |                          |                          |                          |  |     |       |       |  |  |  |  |  |  |  |  |
|       |       |   | <b>YES</b>   | <b>NO</b>                | <b>NA</b>                | <b>Situation</b>   |  | <b>YES</b>               | <b>NO</b>                | <b>NA</b>                | <b>Situation</b>                               |     |       |       |  |  |  |  |  |  |  |  |
|       |       |   | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> | A la carte sales?  |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Selling second meals?                          |     |       |       |  |  |  |  |  |  |  |  |
|       |       |   | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> | Field trip meals?  |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Offer Versus Serve?                            |     |       |       |  |  |  |  |  |  |  |  |
|       |       |   | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> | Incomplete student meals?  |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Claiming student worker meals                  |     |       |       |  |  |  |  |  |  |  |  |
|       |       |   | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> | Adult and non-enrolled student meals?                                  |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Feeding students from another school district? |     |       |       |  |  |  |  |  |  |  |  |
|       |       |   | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> | Lost, stolen or forgotten, misused or destroyed tickets, cards or IDs? |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Charging meals or prepayment of meals?         |     |       |       |  |  |  |  |  |  |  |  |
|       |       |   | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |  |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Unpaid meal charges?                           |     |       |       |  |  |  |  |  |  |  |  |
| _____ | _____ | 6.  | Is there a method of identifying non-reimbursable meals (i.e. not meeting meal pattern requirements, seconds, adult meals, etc.) distinguishing them from reimbursable meals?                  |                          |                          |  |  |                          |                          |                          |  |     | _____ | _____ |  |  |  |  |  |  |  |  |
| _____ | _____ | 7.  | Is someone trained as a backup for the person responsible for determining reimbursable meals and the POS meal count?   |                          |                          |  |  |                          |                          |                          |  |     | _____ | _____ |  |  |  |  |  |  |  |  |
| _____ | _____ | 8.  | Is there a procedure in place if the primary counting and claiming system goes down or is unavailable and do staff know when and how to implement it?  |                          |                          |  |  |                          |                          |                          |  |     | _____ | _____ |  |  |  |  |  |  |  |  |
| _____ | _____ | 9.  | Are daily meal counts correctly totaled and recorded by category on a daily basis?   |                          |                          |  |  |                          |                          |                          |  |     | _____ | _____ |  |  |  |  |  |  |  |  |

This institution is an equal opportunity provider.

**On-Site Review Checklist**

Assessment of the SFA's Meal Counting and Claiming System

YES NO

\_\_\_\_ \_\_\_\_

10. Are internal controls (edit checks, monitoring, etc.) established to ensure that daily meal counts do not exceed the number of eligible students by category or attendance in school? Complete the following chart for today's review:

YES NO

\_\_\_\_ \_\_\_\_

| Breakfast: |         |       | # Students Approved by Category<br>Today's Meal Count by Category | Lunch: |         |       |
|------------|---------|-------|---|--------|---------|-------|
| Free       | Reduced | Paid  |   | Free   | Reduced | Paid  |
| _____      | _____   | _____ |   | _____  | _____   | _____ |
| _____      | _____   | _____ |   | _____  | _____   | _____ |

YES NO

\_\_\_\_ \_\_\_\_

11. Does the system prevent overt identification of children receiving free or reduced price meals?

YES NO

\_\_\_\_ \_\_\_\_

\_\_\_\_ \_\_\_\_

12. If the school prepares food on-site, are Production Records completed daily OR if the school receives their food from another location, are Delivery Tickets completed daily?

\_\_\_\_ \_\_\_\_

\_\_\_\_ \_\_\_\_

13. Are all school lunch records (Production Records, Delivery Tickets, Meal Count Sheets, Edit Check Worksheets, etc) kept on file for at least three years plus the current school year and available for review, if requested?

\_\_\_\_ \_\_\_\_

**NOTE:** The next two questions are for all SFAs except for SFAs on Provision 2 in non-base years or RCCIs that serve only residential children:

\_\_\_\_ \_\_\_\_

NA

14. Is the list of eligible students kept up-to-date and used to provide an accurate daily count of reimbursable free, reduced and paid meals? Check box if not applicable.

\_\_\_\_ \_\_\_\_

NA

\_\_\_\_ \_\_\_\_

NA

15. Does each feeding site complete an edit check worksheet that compiles monthly meal counts by eligibility category and compares attendance-adjusted eligible figures to daily meals counts on a monthly basis? Are any discrepancies accounted for? Check box if not applicable.

\_\_\_\_ \_\_\_\_

NA

**CORRECTIVE ACTION**

NOTE: Required ONLY for questions answered "NO" or if problems are identified during the review.

**Corrective Action Plan:**

Specify date corrective action(s) will be implemented:

By whom:

Title

Signature

School Representative

Title

Date

**CORRECTIVE ACTION 45 Day Follow Up:**

NOTE: Required for all Corrective Action outlined above.

Record observations of corrective action implementation:

Signature

School Representative

Title

Date

Signature

SFA Reviewer

Title

Date

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