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

SFA: _____ **Site:**_____ **Reviewer:** _____

According to USDA regulations, 7 CFR 210.8(a)(1) and 7CFR 220.11(d)(1), a School Food Authority (SFA) with two or more feeding sites is required to perform an on-site review of the meal counting and claiming system and the readily observable general areas of review under 7CFR 210.18(h) by completing the following checklist for each site that offers lunch and 50% 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).

Review Date:_____ **Review Date**:_____

Breakfast:		Point of Service (POS) Meal Count Method used at this site:	Lunch:	
☐ Roster ☐ Ticket ☐ Electronic			☐ Roster ☐ Ticket ☐ Electronic	
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 no, 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):

YES	NO	NA	Situation	YES	NO	NA	Situation
☐	☐	☐	A la carte sales?	☐	☐	☐	Selling second meals?
☐	☐	☐	Field trip meals?	☐	☐	☐	Offer Versus Serve?
☐	☐	☐	Incomplete student meals?	☐	☐	☐	Claiming student worker meals
☐	☐	☐	Adult and non-enrolled student meals?	☐	☐	☐	Feeding students from another school district?
☐	☐	☐	Lost, stolen or forgotten, misused or destroyed tickets, cards or IDs?	☐	☐	☐	Charging meals or prepayment of meals?
				☐	☐	☐	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?	____	____
____	____	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:	____	____

Breakfast:			Meal Counts	Lunch:		
Free	**Reduced**	**Paid**		**Free**	**Reduced**	**Paid**
_____	_____	_____	# Students Approved by Category	_____	_____	_____
_____	_____	_____	Today's Meal Count by Category	_____	_____	_____

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

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Breakfast: YES	Breakfast: NO	Recordkeeping	Lunch: YES	Lunch: 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, CEP 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

YES	NO	Readily Observable General Areas	YES	NO
		Were any issues readily observed in any of the following areas:		
____	____	16. Maintenance of the Nonprofit School Food Service Account?	____	____
____	____	17. Paid Lunch Equity?	____	____
____	____	18. Revenue from non-program foods?	____	____
____	____	19. Indirect costs?	____	____
____	____	20. Free/reduced price process including verification, notification & other procedures?	____	____
____	____	21. Civil Rights?	____	____
____	____	22. Reporting and recordkeeping?		
____	____	23. Food safety?	____	____
____	____	24. Competitive food service?	____	____
____	____	25. Water available at both breakfast and lunch?	____	____
____	____	26. Professional standards	____	____
____	____	27. SBP and SFSP outreach?	____	____
____	____	28. Local school wellness policies?	____	____
____	____	29. Other	____	____

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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