



# *Preparing for Your Virtual Site Visit: With LunchAssist*

*We'll get started in a couple of minutes...*

- Housekeeping
- Introductions
- Preparing for your Virtual Site Visit
- Q&A
- Wrap Up





Type your questions into the Q&A box at the bottom of your screen.

We will have a Q&A at the end of the presentation.

Links will be posted in Chat.

## Jennifer McNeil, RDN, SNS Mickinzie Lopez, MS, RDN, SNS

- Co-founders of LunchAssist
- >100 Administrative Reviews
- Support for districts in 20+ states



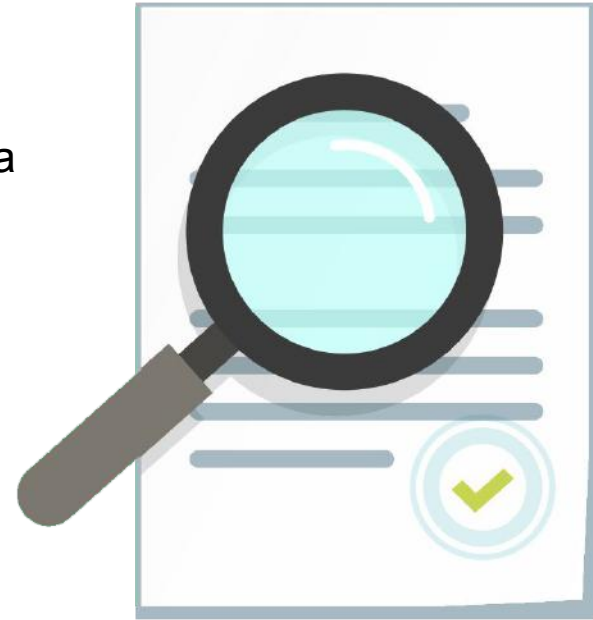
## Renelle Leinbach, SNS

- Health-e Pro Customer Success Coach
- 8+ Years doing Administrative Reviews for SBP/NSLP programs in 7 states
- Helped hundreds of schools manage their programs in multiple softwares
- Enjoys connecting with a wide variety of personalities and customers across the US



## Preparing for an Administrative Review

- Link in chat
- Broad overview of the Administrative Review with a main focus on meal pattern compliance
- Wide background with varied panelists
- Great tips and examples!



# Additional Areas of Review



# Preparing for Your Virtual Site Visit

SY 21-22 SNP Administrative Reviews







# Learning Objectives

## Preparing for Your Virtual Site Visit



Upon completion of this section, participants will be able to:

- Define the key terms related to the meal observation.
- Explain how a virtual observation may vary from an in-person observation.
- Describe the timeline for submitting documentation to your reviewer.
- Identify strategies for preparing school site staff for the meal observation.

# Topics Covered

- Meal Observation 101
- Required signage
- Required paperwork
- In the kitchen
- On the meal service line
- At the point of service
- Meal Observation Checklist



# Meal Observation 101

# # of Schools Reviewed (USDA)



Number of Schools in the SFA	Minimum Number of Schools to Review for NSLP	Number of Schools in the SFA	Minimum Number of Schools to Review for NSLP
1 to 5 .....	1	41 to 60.....	6
6 to 10.....	2	61 to 80.....	8
11 to 20.....	3	81 to 100.....	10
21 to 40.....	4	101 or More.....	12*
<p>* 12 plus 5 percent of the number of schools over 100. Fractions must be rounded to the nearest whole number using standard rounding procedures (i.e. if less than 5 round down, if 5 or more round up).</p>			

Chart Source: Administrative Review Manual, Page 22



# What Else You Need to Know



- **Date of the meal observation**
  - Reviewer must schedule this in advance (no surprise “visits”!)
- The observation may occur:
  - During the week of targeted menu review, or
  - Any other random time!



## PRO Tip:

Ask the reviewer to provide you with the exact date that the meal observation will occur, and which sites will be reviewed. The meal observation should **always** be scheduled in advance.



- **Format of the meal observation**

- Video conference (i.e. Zoom)
- Recorded videos
- Phone calls
- Emails
- Photos
- Other?



**PRO Tip:**

Ask your State agency reviewer what platform they will use for the virtual meal observation.

# Preparing for the Meal Observation



**Downloadable Resource:**  
[Meal Observation Checklist](#)

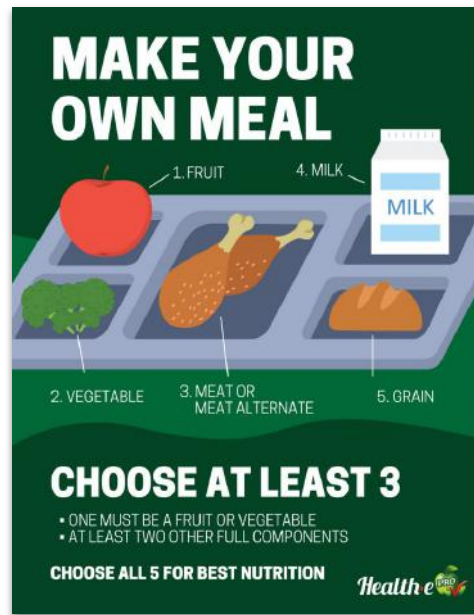


At each site selected for observations:	
<b>Signage</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> "And Justice for All" poster in 11" x 17" size</li> <li><input type="checkbox"/> Health inspection report &amp; permit</li> <li><input type="checkbox"/> Local School Wellness Policy</li> <li><input type="checkbox"/> "Offer Versus Serve" signage for breakfast</li> <li><input type="checkbox"/> "Offer Versus Serve" signage for lunch</li> </ul>
<b>Paperwork</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Buy American Provision exemption forms</li> <li><input type="checkbox"/> Food Safety Manager Certificate (minimum 1 person)</li> <li><input type="checkbox"/> HACCP Food Safety Plan</li> <li><input type="checkbox"/> List of all competitive foods sold</li> <li><input type="checkbox"/> Meal count records (daily/weekly sheets/POS report)</li> <li><input type="checkbox"/> Meal Counting &amp; Claiming Procedures</li> <li><input type="checkbox"/> Menu documentation for all foods offered today</li> <li><input type="checkbox"/> Smart Snacks documentation</li> <li><input type="checkbox"/> Special Diet forms</li> <li><input type="checkbox"/> Temperature logs for the last 6 months</li> </ul>
<b>In the Kitchen</b> Check that your team:	<ul style="list-style-type: none"> <li><input type="checkbox"/> Completes production records accurately &amp; completely</li> <li><input type="checkbox"/> Follows all food safety protocols</li> <li><input type="checkbox"/> Follows standardized recipes (if applicable)</li> <li><input type="checkbox"/> Uses correct measuring utensils</li> </ul>
<b>On the Meal Service Line</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Foods offered match the planned menu</li> <li><input type="checkbox"/> Last child in line has the option of 4+ food items at breakfast</li> <li><input type="checkbox"/> Last child in line has the option of all 5 components at lunch</li> <li><input type="checkbox"/> Portion sizes are correct</li> <li><input type="checkbox"/> Special diet items are provided (if applicable)</li> <li><input type="checkbox"/> Water is available</li> </ul>
<b>At the Point of Service</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> OVS is implemented correctly (if applicable)</li> <li><input type="checkbox"/> Only reimbursable meals are counted (each student selects at least 16 = 5/V)</li> <li><input type="checkbox"/> Meals are counted at the end of the service line</li> <li><input type="checkbox"/> Second meals are counted correctly</li> <li><input type="checkbox"/> Adult meals are counted correctly</li> <li><input type="checkbox"/> Staff know what to do if a student doesn't select a reimbursable meal</li> <li><input type="checkbox"/> Procedures are followed correctly at all points of service (bulk meal distribution, meals in the classroom, meals served to children with special needs, etc.)</li> </ul>



At each site selected for meal observation:

- “And Justice for All” poster
- “Offer v. Serve” signage for breakfast & lunch
- Health permit
- Health inspection
- Wellness Policy



- ❑ Meal count records
  - ❑ Tally sheets
  - ❑ Clicker sheets
  - ❑ POS report
  
- ❑ Meal Counting & Claiming Procedures


**Sample Meal Counting Form and Procedure**  
Meal Counts using a Clicker

**Instructions:** A designated employee will click on the meal counter each time a child is served a reimbursable meal. The designated person will record the school site, meals, meal session description, date and clicker count after each meal session. During the meal session, if the designated employee has a break in meal services, then a second group count will be initiated. At the conclusion of each group, the total meals served to that group based on the clicker count will be recorded. The meal clicker will be "zeroed" between each group. At the end of the meal service, the Child Nutrition employee will add together the totals for each meal session, and record the combined meal counts for that Meal Session in the "Total" section.

**School:** \_\_\_\_\_

(Dates (Write the date in the columns below))

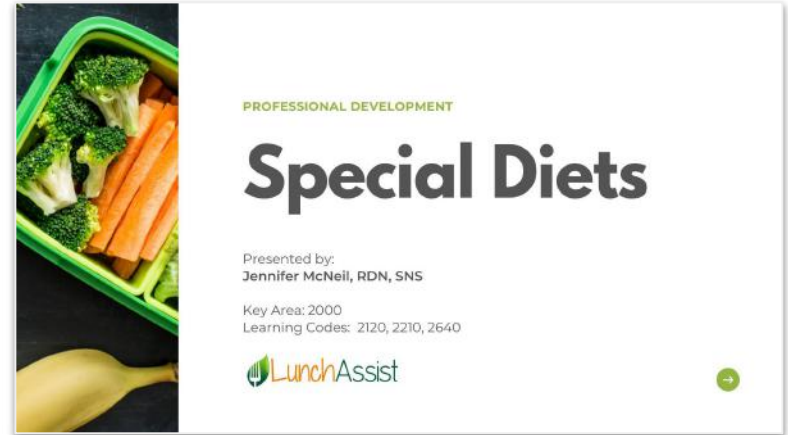
Meal Session Description	Dates (Write the date in the columns below)				
	Monday	Tuesday	Wednesday	Thursday	Friday
<b>Breakfast</b>					
Group 1					
Group 2					
<b>Breakfast Total Served for Children</b>					
<b>Lunch</b>					
Group 1					
Group 2					
Group 3					
Group 4					
Group 5					
Group 6					
Group 7					
<b>Lunch Total Served for Children</b>					
<b>Adult Meals (if any):</b>					
<b>Notes:</b>					



- ❑ Menu documentation of the day's menu items
  - ❑ Menus for all meals
  - ❑ Production/transport records for all meals
  - ❑ Standardized recipes for all menu items planned & served



- ❑ Special Diet documentation
  - ❑ Medical statements
  - ❑ Policy & Procedures



**PRO Members:**

Watch the [“Special Diets” lesson](#) with your staff prior to the meal observation. Not a PRO Member? Be sure to provide your staff with some extra training on Special Diets prior to the meal observation so they feel confident and comfortable with any questions!



- Food Safety Manager Certification (for at least one person)
- HACCP Food Safety Plan
- Temperature Logs for last 6 months:
  - Refrigerators
  - Freezers
  - Milk coolers
  - Hot & cold foods (may be recorded on production/transport records)



**Downloadable Resources:**

[Sample HACCP Food Safety Plan](#) | [COVID-19 HACCP Addendum](#) | [Sample Temperature Log](#)

- ❑ Smart Snacks documentation
  - ❑ List of items sold
  - ❑ Menu documentation
  - ❑ Policy & Procedures
  - ❑ Evidence of compliance



**Linked Resource for AR Boot Camp Members:**  
[Preparing Menu Documentation | Smart Snacks](#) (AR Boot Camp Module)

- Buy American Provision exemption forms for all non-domestic items
- Creditable items *only* (no spices, herbs, condiments, etc.)



**PRO Tip:**

Inspect your cold and dry storage areas ahead of time for items that may need a Buy American exemption form. Anything that is non-domestic must have an exemption form.



**Downloadable Resource:**

[Sample Buy American Exemption Form](#)

Check that your team:

- Completes production records accurately & completely
- Follows all food safety protocols
- Follows standardized recipe(s) for the day
- Uses correct measuring utensils



**PRO Tip:**

Plan to serve the same menu a few weeks before the meal observation and use the Meal Observation checklist to conduct a mock audit. Review all the recipes and procedures with your team to ensure everyone is prepared.





# On the Meal Service Line

- Items offered match the planned menu (as best as possible)
- Portion sizes are correct
- Last child in line has the option of at least 4 food items at breakfast
- Last child in line has the option of all 5 meal components at lunch
- Special diet items are provided (if applicable)
- Water availability



**Downloadable Resource:**

[Increasing Drinking Water Availability in Schools during COVID-19](#)

- All meals are counted correctly:
  - Meals are counted at the *end* of the service line
  - Only reimbursable meals are counted
  - OVS is implemented correctly (if applicable)
  - Team members know what to do if student doesn't select a reimbursable meal
  - Second meals are counted correctly
  - Adult meals are counted correctly



**PRO Members:**

Watch the [“Offer v. Serve”](#) lesson with your staff prior to the meal observation. Not a PRO Member? Be sure to provide your team with extra training on this subject before the meal observation!



- Procedures are being followed at all points of service:
  - Meals in the classroom
  - Bulk meal distribution (i.e. curbside)
  - Meals served to children with special needs
  - Preschool meals
  - Meals picked up for students in detention
  - Field trip meals (if there is a field trip on the day of review)



**PRO Tip:**

Observe meal service at all points prior to the meal observation to identify and correct any procedural mistakes.

## Waiver #100: Flexibility in light of supply chain issues

- Document supply chain issues (emails, invoices, etc.)
- Try to stick to the menu/meal pattern as best as possible!



### PRO Tip:

Check out these [“11 Tips for Staffing Shortages & Supply Chain Disruptions”](#)



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- Register for our free [weekly newsletter](#)
- Try out the free [14-day trial](#) of LunchAssist PRO
- Learn more about [LunchAssist PRO](#) and our [AR Boot Camp](#)

Use code **HEALTHPRO** for 20% the AR Boot Camp!

- Health-e Pro users
- Consolidates all documents for the week
  - Menus
  - Production records
  - Compliance reports
  - Recipes
  - Spec sheets
- Found on the report tab under compliance



**Do you need help with your Administrative Review? We can help!**





**What questions do  
you have?**



*Thank you for joining us!*



[www.healthepro.com](http://www.healthepro.com)  
[www.lunchassist.org](http://www.lunchassist.org)