

CONSULTANT TERRITORIES (Updated 10/8/15)

Area consultants are available to provide technical assistance to school food authorities (SFAs). Following is a list of the area consultants, assigned counties, and telephone numbers where the consultants may be reached.

JERI BUCHANAN 405-246-8342 Jeri.Buchanan@sde.ok.gov	Beckham—05 Comanche (1/2)—16 Cotton—17 Greer—28 Harmon—29 Jackson—33 Kiowa—38 Roger Mills—65 Tillman—71 Washita—75	RACHEL MCDANIEL 405-248-8365 Rachel.McDaniel@sde.ok.gov	Cleveland—14 Oklahoma (1/4)—55
ALBERTA BURGESS 405-213-8327 Alberta.Burgess@sde.ok.gov	Craig—18 Nowata—53 Ottawa—58 Tulsa (1/2)—72 Washington—74	DANA PARKER 405-558-1865 Dana.Parker@sde.ok.gov	Latimer—39 McIntosh—49 Okfuskee—54 Okmulgee—56 Pittsburg—61
TAMMY FLUTE 405-249-0964 Tammy.Flute@sde.ok.gov	Adair—01 Haskell—31 Muskogee—51 Sequoyah—68	KRISTEN I. SCHOELING 405-249-0274 Kristen.Schoeling@sde.ok.gov	Alfalfa—02 Grant—27 Kay—36 Noble—52 Osage—57 Pawnee—59 Payne—60 Woods—76
PAT GOWER 405-246-5648 Pat.Gower@sde.ok.gov	Cherokee—11 Delaware—21 Mayes—46 Wagoner—73	DENISE SMITH 405-219-9015 Denise.Smith@sde.ok.gov	Lincoln—41 Oklahoma (1/4)—55 Pottawatomie—63
FONDI HAYES 405-306-0736 Fondi.Hayes@sde.ok.gov	Carter—10 Garvin—25 Jefferson—34 Johnston—35 Love—43 Marshall—45 Stephens—69	DENISE WIELAND 405-301-5786 Denise.Wieland@sde.ok.gov	Canadian—09 Oklahoma (1/4)—55
KAREN JONES 405-301-7689 Karen.Jones@sde.ok.gov	Atoka—03 Bryan—07 Coal—15 Hughes—32 Murray—50 Pontotoc—62 Seminole—67	VACANT 405-301-7838 @sde.ok.gov	Beaver—04 Cimarron—13 Custer—20 Dewey—22 Ellis—23 Garfield—24 Harper—30 Major—44 Texas—70 Woodward—77
JILL LOWE 405-239-0598 Jill.Lowe@sde.ok.gov	Choctaw—12 LeFlore—40 McCurtain—48 Pushmataha—64	VACANT 405-219-9637 @sde.ok.gov	Creek—19 Rogers—66 Tulsa (1/2)—72
NANCY McCULLOUGH 405-248-7840 Nancy.McCullough@sde.ok.gov	Caddo—08 Comanche (1/2)—16 Grady—26 McClain—47		

State Agency Telephone Number: 405-521-3327
 State Agency Fax Number: 405-521-2239

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BASIC RESPONSIBILITIES

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BASIC RESPONSIBILITIES—AT A GLANCE

1. REQUIRED DOCUMENTATION

a. *INSTITUTION APPLICATION FOR PARTICIPATION*

- Applications are permanent, based on the federal fiscal year October 1 through September 30.
- Applications must always reflect current and approved operations.
- Every facility must maintain a current license/permit.

b. *AGREEMENT*

- Approved agreement is permanent and kept on file unless or until such a time as the institution is terminated or drops from participation.
- Annual updates are required.

2. ELIGIBILITY DOCUMENTATION

a. *ENROLLMENT FORM*

- Must have on every child and be updated annually.
- May annually renew, with any changes indicated by parent/guardian signature and date.
- Must include normal days and hours child is in care and meals child will normally eat.
- Head Start facilities indicate sessions only, not *normal meals eaten* item.
- Child care facilities indicate normal meals eaten.
- Must have signature of parent/guardian.

b. *MEDICAL STATEMENT, IF APPLICABLE*

c. *MILK SUBSTITUTION REQUEST, IF APPLICABLE*

d. *LETTER TO HOUSEHOLD* and *FAMILY-SIZE AND INCOME APPLICATION (FSIA)*

- Distribute to all participants.
- Parents or guardians are *NOT* required to complete this form.
- The institution must use the Household-Size Income Scales for *Free and Reduced-Price Meals* to determine the eligibility status of each household submitting an FSIA.
- FSIA *MUST* be completed and correctly approved by the institution before the institution may report the participant as free or reduced-price.
- FSIA is valid only for the current fiscal year (obtain annually at the beginning of each fiscal year).
- If an institution has Head Start children enrolled, the Head Start facility may complete the *Head Start Federally Funded Enrollment Information* form for the institution to use in lieu of FSIA's.

e. *CHILD AND ADULT CARE FOOD PROGRAM (CACFP) ROSTERS (MONTHLY COUNT OF FREE, REDUCED-PRICE, NOT ELIGIBLE PARTICIPATION)*

- Recommend one roster for each category; i.e., free, reduced-price, and not eligible.
- Maintain monthly for an updated count of free, reduced-price, and not eligible.
- Record the participant in attendance as free, reduced-price, or not eligible (if he or she participated in one or more meal services).
- Total each column and record at bottom of page.
- Maintain with FSIA's.

3. RECORD KEEPING

a. *DAILY ATTENDANCE RECORD* or *DAILY ATTENDANCE RECORD ARRIVAL AND DEPARTURE TIMES*

- Maintain daily on all participants left for care.
- List every participant's first and last names.
- Must support CACFP roster.
- Must maintain arrival and departure times for each participant if institution is approved for more than three meals per day.
- Maintain one each month, posting attendance daily.

- b. **CACFP MEAL COUNT WORKSHEET or DAILY RECORD OF MEALS SERVED**
 - Maintain one each month, posting meal counts daily.
 - A physical meal count must be taken as each meal is served (point of service).
 - No individual meal count claimed may exceed Department of Human Services (DHS) license capacity. (Any meal served over capacity must be reported as nonprogram.)
 - Reimbursement shall not be claimed for more than three meal services per participant per day. Reimbursement is limited to two main meals and one snack or two snacks and one main meal.
 - If more than one shift is approved per meal type, report counts separately.
 - Total each column and record at bottom of page.
 - Child Care Centers: All meals claimed must be served to children 12 years of age or younger.
 - Adult Care Centers: All meals claimed must be served to adults 60 years of age or older.
 - At-Risk Meals: All meals claimed must be served to children 18 years of age or younger.
 - c. **FOOD-PURCHASING FORM (ITEMIZED RECEIPTS)**
 - Should reflect what items were purchased, cost of each item, correct date, and place of purchase. (If store name is not printed on receipt, have clerk write store name and initial.)
 - If receipts are not thoroughly itemized, the *Food-Purchasing Form* is strongly recommended. The form has space to itemize each category of items purchased. One form is to be used per receipt. Staple receipt to form.
 - Keep receipts documenting food purchased for CACFP. All food and milk receipts must be maintained even if the costs of some items are not reported as a CACFP expense.
 - Institutions that contract for meal service record the total from the billing invoice as the monthly food and milk costs. The invoice serves as the itemized receipt.
 - d. **RECORD OF DONATED PRODUCTS**
 - Should reflect what items were donated, the amount of each donated item, the date of donation, the name of donor, and the telephone number of the donor (one form per donation).
 - e. **EXPENDITURE/REIMBURSEMENT WORKSHEET (REPORT OF ALLOWABLE OPERATING AND ADMINISTRATIVE COSTS)**
 - Maintain monthly, posting costs applicable to the CACFP. (Record only approved categories on CACFP application; i.e., cost of food, cost of labor)
 - Report costs under proper categories.
 - If reporting labor costs, record formula as approved on application used to arrive at amount claimed for each person. (Documentation of labor costs must be available.) Write the name of each person reported as food service and administrative labor.
 - Form must be used to document the nonprofit status of the institution's food service operations.
 - f. **BLENDED RATES WORKSHEET**
 - Optional.
 - Use to calculate participation data and reimbursement payments.
 - g. **CACFP CLAIM FOR REIMBURSEMENT/PAYMENT NOTICE**
 - Complete claim based on the records maintained at the institution.
 - Submit to the Oklahoma State Department of Education Child Nutrition Programs (hereinafter referred to as the *State Agency*).
 - Keep a copy of the claim for reference and auditing purposes.
 - Claims submitted after 60 days cannot be paid without approval of a one-time exception.
 - Maintain *Payment Notice* reflecting deposit of CACFP reimbursement and claim confirmations.
4. **OTHER REQUIRED RECORDS**
- a. Canceled checks for labor costs, food receipts, and for any other cost reported as a CACFP expense.
 - b. Title XX documentation from DHS, if applicable.
 - c. *Building for the Future* fact sheet—proof of reproduction and distribution.
 - d. Women, Infants, and Children (WIC) brochure—posted in institution.
 - e. Health Department inspection.

5. **INVENTORY**

a. **MONTHLY RECORD OF INVENTORY (Optional)**

- Maintain monthly to reflect purchased foods remaining at the end of the month.
- Inventory only unopened items.
- Maintain in center at all times.

b. **MILK INVENTORY FORM (Optional)**

- Maintain monthly to reflect purchased milk remaining at the end of the month.
- Maintain in center at all times.

6. **FOOD PRODUCTION RECORDS/MENUS AS SERVED**

- Must follow the CACFP minimum meal pattern requirements for child/adult care institutions.
- Must record daily meals served, including total quantities served, counts by age group, date, etc. (as shown in *Food Production Records/Menus as Served* section).
- Must maintain in center at all times.
- Medical statements must be maintained and available for any meals that do not meet minimum meal pattern requirements due to medical or special dietary needs.
- Child Nutrition (CN) label or product formulation statement** must be maintained for any processed and/or combination food used.
- Contract Meal Service Delivery Receipt** must be maintained in lieu of the *Food Production Records/Menus as Served*, if applicable.

Note: All meals must be consumed on-site.

7. **TRAINING**

- Person designated by the institution as the program's trainer must conduct annual CACFP training and maintain documentation.
- Training of all personnel involved with the CACFP, including all shifts and new personnel, is the institution's responsibility. Documentation of all personnel training must be maintained.
- Documentation should include date, agenda, list of topics, and signatures of participants.
- Required training topics include meal patterns, reimbursement process, meal counting, claims submission, and record keeping.

Note: The State Agency provides on-site technical assistance upon request.

8. **CIVIL RIGHTS**

- . . . *And Justice for All* poster displayed at each facility.
- The nondiscrimination statement must be included on all CACFP materials developed by the institution provided to the public. (Reference FNS Instruction 113-1, Section IX, B, 4.)
- Civil rights complaint-filing procedure on file.

9. **COMPLIANCE MONITORING**

- Administrative Reviews—Reviews are conducted of each participating institution to ensure compliance with Performance Standards and all other requirements of the CACFP.
- Audits—Nonprofit or public institutions expending \$500,000 or more in total federal funds in the prior fiscal year are required to submit an organizationwide audit annually. These audits are due nine months after the end of the institution's fiscal year.

10. **INFANTS**

- Institutions must offer meals to all enrolled infants.
- Infant meals must follow Infant Meal Pattern requirements.
- Infant Meal Waiver must be maintained on every infant not receiving a reimbursable meal.
- Infant meals served must be documented on Infant Meals as Served form.

11. **CONTRACTING WITH OUTSIDE VENDOR (PUBLIC SCHOOLS, HEAD STARTS, OTHER FOOD SERVICE ENTITIES) FOR FOOD SERVICE**
Contract Meal Service Delivery Receipt form is required if institution is contracting with an outside entity that is not a public school.
12. **AT-RISK MEAL PROGRAM**
 - a. Eligibility.
 - b. Reimbursement.
 - c. Times of operation.
 - d. Record keeping.
13. **MULTISITED INSTITUTION ADDITIONAL REQUIREMENTS**
 - a. **REPORT OF FACILITIES OPERATING UNDER ONE INSTITUTION**
 - b. **PREAPPROVAL VISIT FORM**
 - c. **ON-SITE MONITOR REVIEW FORM**
 - d. **HOUSEHOLD CONTACT DOCUMENTATION**
 - e. **JOB DESCRIPTIONS MUST BE SUBMITTED**
 - f. **BUDGET REVISIONS RECORD FOR MULTISITED INSTITUTIONS, IF APPLICABLE**

All of the forms provided in this manual are to be used in the 2014 fiscal year **ONLY** (October 1, 2013, through September 30, 2014).