## 2 — Menu Records

SFAs must be able to document that foods used in reimbursable meals provide the food components and serving sizes required by the NSLP and SBP meal patterns. Without appropriate documentation, foods cannot credit toward reimbursable meals.

Table 2-1 summarizes the records required to document the meal pattern compliance of commercial foods and foods made on site. SFAs must maintain these records on file for the CSDE’s Administrative Review of school nutrition programs.

<table>
<thead>
<tr>
<th>Table 2-1. Documentation for meal pattern compliance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Commercial foods</strong></td>
</tr>
<tr>
<td>Menus</td>
</tr>
<tr>
<td>Production records</td>
</tr>
<tr>
<td>Child Nutrition (CN) labels</td>
</tr>
<tr>
<td>Product formulation statement (PFS) forms</td>
</tr>
<tr>
<td>Nutrition information (Nutrition Facts labels and ingredients)</td>
</tr>
</tbody>
</table>

This section provides information on each requirement.

### Menus

SFAs must maintain menu records that document the service of reimbursable meals to students in grades K-12. Menus should reflect all meal choices and types of milk.

The CSDE recommends that SFAs develop cycle menus. A cycle menu is a series of menus planned for a specific period, such as four weeks, with a different menu for each day. Cycle menus can help SFAs comply with the meal pattern requirements, increase variety, control food cost, control inventory, and save time. For additional guidance and resources on cycle menus, see chapter 3 in the USDA’s guide, *Menu Planner for School Meals.*
2 Menu Records

The USDA’s menu worksheets indicate whether menus for grades K-12 comply with the NSLP and SBP meal patterns, including the meal components and dietary specifications. These are the worksheets that SFAs must use to demonstrate compliance for the USDA’s additional 7 cents funding for compliant school meals. These worksheets are available on the CSDE’s Certification of Meal Pattern Compliance webpage.

The CSDE’s lunch menu planning checklists provide guidance for determining if lunch menus comply with the meal pattern requirements. These checklists are available in the “Documents/Forms” section of the CSDE’s Meal Patterns for Grades K-12 in School Nutrition Programs webpage. For sample menus and other resources on school meals, see the CSDE’s resource list, Menu Planning and Food Production. For guidance on menu planning and additional menu checklists, see chapter 3 in the USDA’s guide, Menu Planner for School Meals.

Production Records

The USDA’s regulations 7 CFR 210.10(a)(3) and 7 CFR 220.8(a)(3) require that SFAs must maintain daily production records for all school meals. A production record is a working tool that outlines the type and quantity of foods that need to be purchased and available for the meal service.

Production records must show how the offered meals contribute to the required food components and food quantities for each meal served to each grade group every day. During the Administrative Review of school nutrition programs, the CSDE will evaluate the SFA’s production records to ensure that they:

- include all information necessary to support the claiming of reimbursable meals, i.e., all menu items are listed and all required meal components are offered;
- are used for proper planning (e.g., evaluate for consumption and leftovers);
- document that the prepared foods are creditable for the total number of reimbursable meals offered and served;
- document a la carte, adult meals, and other nonreimbursable meals (such as student purchased of second meals), including the number of portions for each of these food items;
- document that menus meet the requirements for fluid milk, vegetable subgroups, juice limits, and minimum weekly WGR items;
- document that menus meet the weekly quantity requirements for fluid milk, vegetables, fruits, grains, and meats/meat alternates; and
- align with standardized recipes, i.e., the ingredients in standardized recipes correspond to the menu items listed on the production records.

SFAs must keep production records on file for three years plus the current school year.
Table 2-2 indicates the elements that production records should include and when food service personnel should complete the required information.

<table>
<thead>
<tr>
<th>Table 2-2. Required elements for production records</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Complete before meal service</strong></td>
</tr>
<tr>
<td>• Name of site</td>
</tr>
<tr>
<td>• Meal date</td>
</tr>
<tr>
<td>• Meal type (breakfast or lunch)</td>
</tr>
<tr>
<td>• All planned menu items including all meal choices, food components, types of milk, leftovers, substitutions, and all other food items such as condiments and other noncreditable foods</td>
</tr>
<tr>
<td>• Recipe name and number or product name and code</td>
</tr>
<tr>
<td>• Planned serving size and number of servings for reimbursable meals for each age/grade group, and if applicable, nonreimbursable meals (e.g., second meals and adult meals), and a la carte sales</td>
</tr>
</tbody>
</table>

¹ Food service staff should record temperatures throughout the meal service to ensure that hot foods are held at 140 °F or above and cold foods at held at 41 °F or below. For additional guidance, visit the CSDE’s Food Safety for Child Nutrition Programs webpage.

**Ensuring compliance**

To avoid potential compliance issues with production records, food service personnel must:

- complete all information, i.e., ensure that information is not missing or incomplete;
- make the information legible, i.e., ensure that handwriting can be read;
- use the proper weight or volume measure for each food item, e.g., use cups for fruits and vegetables instead of ounces (see “Volume versus weight” on the next page);
- enter the number of servings, pounds, cans, or pieces (not the number of portions prepared) in the column for “total quantity of food used;”
- separately list each type of milk served;
- list all condiments;
Menu Records

- list portion sizes accurately and ensure that these serving sizes are the same as what is actually being served to students;
- list all items prepared for the meal including daily items and alternate meal choices;
- accurately record the “planned” servings for each age/grade group;
- separately list nonreimbursable adult meals and second student meals from reimbursable student meals;
- add any extra amounts of food needed during the meal service period;
- note if any substitutions are made or leftovers are used; and
- use a production record for each site, including satellite locations.

Volume versus weight
During the Administrative Review of school nutrition programs, the CSDE frequently finds that production records include incorrect information for the volume or weight of a menu item. Production records must reflect the measurements required by the NSLP and SBP meal patterns. For example, the meal patterns require a specific volume (cups) for the fruits component and vegetables component, and specific a volume (tablespoons) for peanut butter. Therefore, production records must list the servings of fruits and vegetables in cups, not weight, and the servings of peanut butter in tablespoons, not weight (ounces).

SFAs should train food service staff on the difference between fluid ounces (volume) and ounces (weight). Volume is the amount of space an ingredient occupies in a measuring container, and is not the same as weight. Volume measures include teaspoon, tablespoon, fluid ounce, cup, pint, quart and gallon. A specific measure of volume (fluid ounces) does not equal the same measure of weight (ounces). For example, a ½-cup serving of a food (4 fluid ounces) does not weigh 4 ounces. The weight of a volume measure of food varies depending on the density of the food. For example, ½ cup of lettuce weighs less than ½ cup of canned peaches, and 1 cup of whole-grain cereal weighs less than 1 cup of molasses.

Sample production records
The CSDE’s sample production records below include forms for different grade groups based on either food items or food components. These forms help SFAs provide the information required to comply with the USDA’s regulations for production records. SFAs may use these production records for breakfast and lunch.

- Food Components for Grades K-5
- Food Components for Grades 6-8
- Food Components for Grades 9-1
- Food Components for Grades K-8
- Food Components for Grades K-12
- Food Components for Grades PreK-8
Menu Records

- Food Components for Grades PreK-12
- Food Items for Grades K-5
- Food Items for Grades 6-8
- Food Items for Grades 9-12
- Food Items for Grades K-8
- Food Items for Grades K-12
- Food Items for Grades PreK-8
- Food Items for Grades PreK-12

The CSDE’s production records are available on the CSDE’s Production Records for School Nutrition Programs webpage. The CSDE’s handout, Requirements for Production Records in School Nutrition Programs, summarizes the requirements for production records. For additional guidance on production records, see chapter 4 of the USDA’s guide, Menu Planner for School Meals.

Standardized Recipes

The USDA’s regulations 7 CFR 210.10(b)(5)) require that SFAs develop and follow standardized recipes. The USDA defines a standardized recipe as one that has been tried, adapted, and retried several times for use by a given foodservice operation; and has been found to produce the same good results and yield every time when the exact procedures are used with the same type of equipment, and the same quantity and quality of ingredients. Standardized quantity recipes produce 25 or more servings.

Standardized recipes have many benefits. They help school nutrition programs to ensure:

- consistent food quality;
- predictable yield;
- accurate meal component contributions;
- consistent nutrient content;
- food safety through preparation steps that avoid cross-contamination and ensure appropriate time and temperature;
- customer satisfaction;
- food cost control;
- efficient purchasing procedures;
- inventory control;
- labor cost control;
- increased employee confidence;
- reduced record keeping; and
- successful completion of the CSDE’s Administrative Review of school nutrition programs.
Menu Records

When SFAs prepare foods on site, standardized recipes must document that the serving provides the amount of each food component being credited toward the meal patterns. For example, if the menu planner credits lasagna as 2 ounce equivalents of the meat/meat alternates component, ¼ cup of the red/orange vegetables subgroup, and 2 ounce equivalents of the grains component, the SFA’s standardized recipe must document that each serving of lasagna contains 2 ounces of cooked lean meat and cheese, ¼ cup of tomato sauce, and 1 cup of WGR or enriched pasta.

Foods made on site include:

- foods that are prepared from scratch using a recipe, such as cornbread, coleslaw, potato salad, soup, lasagna, chicken stir-fry, and casseroles; and
- foods that require some additional processing by adding other ingredients after purchasing. For example, making rice or pasta with butter, sautéing vegetables in oil, adding dressing to salad, assembling a sandwich, adding eggs and oil to a muffin mix, and reconstituting canned soup with milk.

Standardized recipes are not required for foods that do not contain any added ingredients, such as fresh fruits and vegetables, purchased breads and rolls, and commercially prepared entrees and side dishes.

Requirements for standardized recipes

SFAs may standardize their own local recipes or use existing standardized recipes such as the USDA’s recipes. Standardized recipes must include the following:

- recipe name that describes the recipe;
- recipe number that is unique to each recipe;
- recipe category classification, e.g., main dish, grains, and vegetables;
- recipe yield (weight and/or volume and number of servings), i.e., the amount produced when production is complete;
- ingredients used;
- ingredient amounts per yield, i.e., the quantity (weight or volume) of all ingredients for each yield, such as 50 servings or 100 servings;
- preparation equipment and utensil, such as pans, steamers and mixers;
- food safety Critical Control Points (CCPs), i.e., time and temperature critical limits for each step of preparing, holding, serving, and storing;
- cooking time and temperature, as required;
- serving size (the weight and/or volume of the single portion size);
- serving utensils such as scoops, ladles, and spoodles; and
• meal pattern component contributions per serving, e.g., fruits component, vegetables component (including subgroups), grains component, and meats/meat alternates component.

The CSDE’s *Standardized Recipe Form for School Nutrition Programs* provides a template that SFAs may use to develop standardized recipes. For more information on using standardized recipes, see chapter 4 of the USDA’s guide, *Menu Planner for School Meals*, “Determining In-house Product Yields” in this section, and the resources below.

**Recipe resources**

The resources below assist SFAs with developing and using standardized recipes.

• Basic Culinary Math for School Nutrition Professionals (ICN): https://theicn.org/school-nutrition-programs/

• Basics at a Glance Portion Control Poster (ICN): https://theicn.org/ican-resources-a-z/basics-at-a-glance/

• Child Nutrition Recipe Box (ICN): https://theicn.org/recipes/


• Measuring Success with Standardized Recipes (ICN, formerly NSFMI): https://portal.ct.gov/-/media/SDE/Nutrition/NSLP/Crediting/Measuring_Success_Standardized_Recipes_NFSMI.pdf


• On the Road to Professional Food Preparation eLearning: Portion Control (ICN): https://theicn.docebosaas.com/learn/course/external/view/elearning/16/portion-control

Menu Records


- Recipes for Healthy Kids (ICN): https://theicn.org/icn-resources-a-z/recipes-for-healthy-kids/


- USDA Standardized Recipes: https://www.fns.usda.gov/usda-standardized-recipe


For more information, visit the CSDE’s Menu Planning for Child Nutrition Programs webpage.
**Documentation for Commercial Products**

Commerciably prepared foods used in school meals must provide the amount of the food components being credited toward the meal patterns. For example, to credit a commercially prepared beef burrito as 2 ounce equivalents of the meat/meat alternates component, the manufacturer’s documentation must indicate that one serving of the product contains 2 ounces of cooked lean meat.

To credit commercial products, SFAs must obtain either:

- the original CN label from the product carton or a photocopy or photograph of the CN label shown attached to the original product carton; or
- a PFS signed by an official of the manufacturer stating the amount of each meal pattern component contained in one serving of the product.

These are the only acceptable records that SFAs can use to document a commercial product’s contribution to the USDA’s meal patterns for Child Nutrition Programs. Nutrition Facts labels, ingredients statements, and product packaging do not provide sufficient information to document a product’s meal pattern contribution.

Table 2-3 compares the criteria for CN labels and PFS forms. Only CN labels provide a guarantee of the product’s contribution to the USDA’s meal patterns for the Child Nutrition Programs.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>CN label</th>
<th>PFS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard information required</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Reviewed and monitored by the USDA</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Includes USDA’s guarantee of meal component contribution for Child Nutrition Programs</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Distinct six-digit product identification number</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>SFAs must check crediting information for accuracy</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

**Commercial products without a CN label or PFS cannot credit toward the meal patterns.** For additional guidance on accepting product documentation, see the CSDE’s handout, *Accepting Processed Product Documentation*, and CSDE Operational Memorandum No. 10-15: *Guidance for Accepting Processed Product Documentation for Meal Pattern Requirements.*
Menu Records

Child Nutrition (CN) labels

The USDA’s CN Labeling Program is a voluntary federal labeling program for Child Nutrition Programs. It provides food manufacturers the option to include a standardized food crediting statement on their product labels, which the USDA approves prior to use. Manufacturers participating in the CN Labeling Program must have quality control procedures and inspection oversight that meet USDA’s requirements.

The USDA does not require that manufacturers make CN-labeled products or that SFAs purchase foods with CN labels. Purchasing decisions are at the discretion of the local SFA. If a CN-labeled product is required, the SFA must clearly state this information in their purchasing specifications.

CN labels are available only for main dish entrees that contribute to the meat/meat alternates component of the USDA’s meal patterns. Examples include beef patties, cheese or meat pizzas, meat or cheese and bean burritos, egg rolls, and breaded fish portions.

CN labels will usually indicate the contribution of other meal components that are part of these products. For example, CN-labeled pizza may list contributions to the meat/meat alternates, grains, and vegetables components; and CN-labeled breaded chicken nuggets may list contributions to the meat/meat alternates and grains components.

A CN label statement clearly identifies the contribution of a food product toward the meal pattern requirements, based on the USDA’s evaluation of the product’s formulation. Manufacturers state this contribution on their labels. CN labeling provides a warranty that the product contributes to the meal pattern requirements as printed on the label.

The CN label is found on the actual product packaging and will always contain the following:

- the CN logo, which is a distinct border;
- the meal pattern contribution statement;
- a six-digit product identification number;
- the USDA’s authorization; and
- the month and year of approval.

The USDA does not allow manufacturers to place the CN label on a fact sheet or any other product information. Acceptable and valid documentation for the CN label includes the original CN label from the product carton, or a photocopy or photograph of the CN label.
The resources below provide additional information on CN labels.

- Accepting Processed Product Documentation (CSDE):

- CN Labeling Program (USDA website):
  https://www.fns.usda.gov/cn/labeling-program

- Child Nutrition (CN) Labeling Program (CSDE):

- USDA Memo SP 11-2015 (v2) CACFP 10-2015 SFSP 13-2015: CN Labels Copied with a Watermark Acceptable Documentation:
  https://www.fns.usda.gov/cn-labels-copied-watermark-acceptable-documentation


The USDA’s Authorized Labels and Manufacturers webpage lists approved CN-labeled products and manufacturers.

**Product formulation statements**

A PFS is a document developed by manufacturers that provides specific information about how a product credits toward the USDA’s meal patterns for Child Nutrition Programs. It generally includes a detailed explanation of what the product contains and indicates the amount of each ingredient in the product by weight. The information on a PFS can vary among manufacturers because the USDA does not monitor PFS forms.

To document a product’s crediting information, the PFS must:

- indicate how the product credits toward the USDA’s meal pattern requirements;
- document how the manufacturer obtained the crediting information by citing specific Child Nutrition Program resources or regulations such as the USDA’s *Food Buying Guide for Child Nutrition Programs* (FBG) and USDA’s policy on crediting foods (such as the USDA’s policy memos for school meals and Food and Nutrition Service (FNS) instructions for Child Nutrition Programs); and
- be prepared on company letterhead with the signature of a company official and the date of issue. The signature can be handwritten, stamped, or electronic.
All creditable ingredients in the PFS must match a description in the FBG. The USDA’s CN Labeling website provides sample PFS templates for the meat/meat alternates, vegetables, fruits, and grains components. If the PFS does not meet these requirements, the SFA cannot accept it, and the product cannot credit in school meals.

Unlike a CN label, a PFS does not provide any warranty against audit claims for reimbursable meals. The USDA does not monitor PFS forms for compliance with the product’s actual formulation or stated contribution to the meal pattern requirements. Therefore, SFAs must check the manufacturer’s crediting information for accuracy prior to including the product in reimbursable meals. SFAs should request supporting documentation from manufacturers, verify its accuracy, and maintain this documentation on file for the CSDE’s Administrative Review of school nutrition programs.

The resources below provide additional information on PFS forms.

- **Food Manufacturers/Industry (USDA Webpage):**

- **Product Formulation Statement for Fruits: Completed Sample (USDA):**

- **Product Formulation Statement for Grains (USDA):**

- **Product Formulation Statement for Grains: Completed Sample (USDA):**

- **Product Formulation Statement for Meat/Meat Alternates (USDA):**

- **Product Formulation Statement for Vegetables and Fruits (USDA):**

- **Product Formulation Statement for Vegetables: Completed Sample (USDA):**

- **Questions and Answers on Alternate Protein Products (APP):**

- **Reviewer’s Checklist for Evaluating Manufacturer Product Formulation Statements (Product Analysis) for Meat/Meat Alternate (M/MA) Products:**

For more information, see the CSDE’s handout, *Product Formulation Statements*, and the USDA’s handout, *Tips for Evaluating a Manufacturer’s Product Formulation Statement*.
Determining Food Yields

The USDA’s FBG provides yield information for common types and customary sizes of meat/meat alternates, vegetables, fruits, and grains, including commercially available foods and USDA Foods. The FBG helps SFAs determine:

- how many servings a specific quantity of food will provide;
- what quantity of raw product will provide the amount of ready-to-cook food in a recipe; and
- how much food to buy.

SFAs should use the FBG to determine how much food to purchase to meet the minimum servings in the USDA’s meal patterns, and to calculate how school recipes contribute to the meal patterns. For example, menu planners can use the FBG to determine how much raw broccoli provides 50 servings of ½ cup of cooked vegetable or how much uncooked brown rice provides 100 servings of 1 cup of cooked rice. This information is essential for documenting compliance with the meal pattern requirements.


Determining in-house product yields

The yield information provided in the FBG represents average yields based on research conducted by the USDA. Many factors affect yield, including:

- the quality and condition of the food purchased;
- storage conditions and handling;
- the equipment used in preparation;
- cooking method and time;
- the form in which the food is served, e.g., whether potatoes are mashed, fried, or baked; and
- the serving utensils and portion control methods used.

If a food service operation consistently obtains a higher or lower yield for a product than the yield listed in the FBG, the SFA should conduct an in-house yield study to determine the actual number of portions of a specified size that the product provides. In-house yields are also required for products not listed in the FBG. The CSDE allows SFAs to use in-house yields if they are properly documented and follow the CSDE’s yield study procedures.
2 Menu Records

CSDE yield study procedures

SFAs can use the procedures below to determine and document in-house yields for food products.

1. Select a day when the product is served on the menu. Use at least four separate samples of the product to determine yields. A “sample” is the product pack unit, such as number 10 cans or 5-pound bags. If the food service operation uses more samples, the yield data will be more accurate.

2. For the best yield estimate, at least two people should independently portion and count the samples. Each person completes half of the samples. For example, with a sample of four cans, each person works alone to measure and count the servings from two cans.

3. Select the appropriate measuring utensil for the portion size being served, such as a number 16 scoop/disher or ½-cup measuring spoon. For information on measuring utensils, see the Institute of Child Nutrition’s (ICN) Basics at a Glance Portion Control Poster.

4. Fill the measuring utensil level to the top of the measure.

5. Carefully count and document the number of portions in each sample.

6. Add the total number of servings from each of the samples.

7. Divide the total number of servings by the number of samples to get the average number of servings per sample.

8. Complete the CSDE’s Yield Study Data Form and maintain on file for review by the CSDE staff during the Administrative Review of school nutrition programs.

For additional assistance with yield studies, contact the CSDE’s school nutrition programs staff.
Nutrition Information

SFAs must obtain nutrition information for all commercially prepared foods used to prepare school meals. If a processed product does not have a Nutrition Facts panel, the SFA is responsible for obtaining the necessary information from the manufacturer. This information must be readily available for use by the CSDE in conducting the nutrient analysis of school menus, as part of the CSDE’s Administrative Review of school nutrition programs.

The USDA considers providing nutrition information for foods served in school meals a component of reasonable meal modifications for children whose disability restricts their diet. SFAs are responsible for making nutrition information for school meals available to students, families, school nurses, and others as needed. For information on the requirements for meal modifications, see the CSDE’s guide, *Accommodating Special Diets in School Nutrition Programs*, and visit the CSDE’s Special Diets in School Nutrition Programs webpage.

The USDA encourages SFAs to inform students, parents, and the public about efforts they are making to meet the meal requirements for school meals.

Trans fats

Labels or manufacturer specifications for all food products and ingredients used to prepare school meals must indicate zero grams of trans fats per serving. Menu planners cannot use nutrient databases to determine values for trans fats because nutrient databases do not currently have complete data for trans fats.

SFAs must add the specification for zero trans fats to procurement contracts and request the required documentation (nutrition label or manufacturer specifications) from manufacturers. Menu planners must review all commercially prepared products for trans fats content before purchasing.

**Note:** The Food and Drug Administration (FDA) requires manufacturers to remove artificial trans fats from all products by June 18, 2018. However, the FDA is allowing products produced prior to this time to work their way through distribution and comply by January 1, 2020. Therefore, SFAs must continue to review the Nutrition Facts label and manufacturer’s specifications to ensure that all products used in school meals contain zero grams of trans fat per serving. For more information, see “Trans Fats” in section 6.
Nutrient analysis

During the Administrative Review of school nutrition programs, the CSDE must assess whether meals offered to students in grades K-12 are consistent with the USDA’s dietary specifications (nutrition standards) for calories, saturated fat, trans fat, and sodium. The CSDE’s Administrative Review of school nutrition programs will include the SFA’s:

- menus;
- production records;
- standardized recipes;
- product formulation statements and CN labels; and
- if applicable, nutrition information showing how the products contribute toward the meal pattern requirements.

If a nutrient analysis is required as part of the CSDE’s Administrative Review of school nutrition programs, it will include all foods (including condiments) and beverages offered as part of reimbursable meals during the one-week review period. SFAs are not required to conduct a nutrient analysis of their own menus because SFAs are expected to follow the meal patterns to meet nutrient targets. However, SFAs may choose to conduct a nutrient analysis of menus to assist in their efforts to ensure they are meeting the dietary specifications.

Nutrition disclosure

The USDA’s regulations (210.10 (n)) require that SFAs must accurately represent foods on breakfast and lunch menus. Menus cannot claim that a food item is beef, pork, poultry (such as chicken or turkey) or seafood (such as fish or tuna) if the food item contains more than 30 percent alternate protein product (APP). The names used for these menu items must reflect that they are not 100 percent meat, poultry, or fish. For more information on APPs, see “Alternate Protein Products” in section 3.