

Production Record Training



Welcome to the Louisiana Department of Education's presentation on Production Records.

Maintaining production records is an important responsibility of Child Nutrition Programs, which are a USDA requirement for the National School Lunch and School Breakfast Programs.

AR - Administrative Review

CNP - Child Nutrition Program

NSLP - National School Lunch Program

OVS - Offer vs Serve

SBP - School Breakfast Program

SFA - School Food Authority

SFS - School Food Service

USDA - United States Department of Agriculture

Introduction

The U.S. Department of Agriculture's (USDA) regulations for the National School Lunch Program (NSLP) [7 CFR 210.10\(a\)\(3\)](#) and School Breakfast Program (SBP) [7 CFR 220.8\(a\)\(3\)](#) require that school food authorities (SFAs) must maintain daily production records for all school meals.

This training provides instruction on how to meet the requirements outlined in 7 CFR 210 and 220 for completing and maintaining production records.



The U.S. Department of Agriculture's (USDA) regulations for the National School Lunch Program and School Breakfast Program require that school food authorities (SFAs) must maintain daily production records for all school meals.

This training provides instruction on how to meet the requirements outlined in 7 CFR 210 and 220 for completing and maintaining production records.

What is a Food Production Record?

A production record is a required daily document that records all aspects of meal production: to plan for meal service and document the actual quantities prepared and served.

Production records must show how the offered meal contributes to the required food components and food quantities for each meal served to each grade group every day.

In this way, the production record serves as a source document to validate a reimbursable meal was provided to participants of the NSLP and SBP.



Because school food service claims are paid on a meals times rate basis, maintaining production records is an important responsibility of child nutrition programs. As part of the Administrative Review process, an SFA will be asked to submit production records for an assigned week of menus for review to validate that reimbursable meals were offered and served to all students. Completing production records will help ensure and document that meal pattern component requirements are met for each meal.

All meals claimed for reimbursement in the NSLP and SBP program must have Food Production Record documentation as evidence of reimbursable meals provided to participants. Without this documented evidence of reimbursable meals, Child Nutrition Program funding may be jeopardized.

Production Records

Production records provide documentation to:

- support meal claims submitted for reimbursement
- help manage the program and communicate necessary information for producing reimbursable meals
- demonstrate compliance with nutrition standards
- supply a wealth of information for forecasting products, purchasing foods, controlling waste, and identifying popular and not so popular menu items



Production records provide documentation to:

- support meal claims submitted for reimbursement
- help manage the program and communicate necessary information for producing reimbursable meals
- demonstrate compliance with nutrition standards
- Additionally, production records supply a wealth of information for forecasting products, purchasing foods, controlling waste, and identifying popular and not so popular menu items.

Required Elements of Production Records

- Site Information
 - date
 - name of school/site (meal site)
 - OVS (if applicable)
 - grade group(s)
- Meal Information
 - meal service: lunch / breakfast
 - number of meals planned and served (by category)
- Meal Planning Information
 - menu item, item details, portion size, number of portions planned, meal component contribution
- Meal Documentation Information
 - total quantity prepared, number of leftovers



You may use any production record format you wish as long as it includes certain key items.

The following elements of a production record are a USDA requirement:

- Site Information
 - date
 - name of school/site (meal site)
 - OVS (if applicable)
 - grade group(s)
- Meal Information
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Production Record Information

Site Information

- date
- name of school/site (meal site)
- OVS (if applicable)
- grade group(s)
- Verifiers' signature and title

Meal Information

- meal service: lunch / breakfast
- number of meals planned and served (by category)
 - Student meals
 - Adults/teachers
 - SFS staff
 - At Costs / 2nd meals



Production records should clearly indicate site and meal information for each meal prepared and served each day.

Site information must include, at a minimum, the date, site name, and grade group for whom the meal is being prepared. After meal service, the person in charge of the site should review and sign the record to ensure it is complete and accurate, and file it for future reference.

Meal information must include the meal being offered for the day. The planned meals should be completed prior to meal service while served meals will be filled out after the meal service is over.

Grade Groups and Production Records

- The appropriate grade grouping reflected on the production record must be based on the applicable meal pattern used.
- In a school where more than one age/grade group is served, the information must be very clear.

A best practice is to use a separate production record for each age/grade group served to show that portions served are in compliance with meal pattern requirements by age/grade grouping.



In a school where more than one age/grade group is served, the information must be very clear. The best way to ensure the information is clear is to keep separate production records for each grade group served.

However, some SFAs or software programs generate production records with a format that allows for more than one age/grade groups on one form. In this scenario, each grade group must be clearly separated for identification of meal requirements and total reimbursable meals served for claiming purposes.

Multiple Grade Groups for Breakfast Menus

What if multiple grade groups (K-12) are served at one school site and all students receive the same breakfast menu items and serving sizes?

- A K-12 menu and serving sizes may be utilized and one production record may be completed for all grades in K-12.



In terms of breakfast menus, if multiple age/grade groups are served at one school site and all students receive the same breakfast menu and services, one K-12 menu along with the applicable serving services may be utilized and therefore one production record may be completed for all grades in K-12. You will notice at the top of the breakfast production record that a K-12 option is available to circle.

Meal Planning Information

Planning Section - complete before meal service

- Menu Item
 - All planned menu items including all menu choices, food components, types of milk, leftovers from the previous day, substitutions, and other food items offered such as condiments and non-creditable foods
- Item Details
 - Recipe number, CN label number, USDA item
- Portion Size
 - Specific unit of measure served to each grade group (1 cup, 1 each, 2 oz)
- Number of Portions Planned
 - Indicate the number of portions planned for each menu item for the age/grade group the meal is being produced
- Meal Component Contribution
 - Indicate the meal pattern contribution for each item.



Meal Planning Information

- Indicate the specific planned menu item choices, food components, milk types, leftovers, substitutes and any condiments and non-creditable foods.
- Provide details of all food items/components such as recipe number (as applicable) and/or the product name and corresponding CN number for the foods used to prepare the menu item.
- Indicate the actual planned portion size for each food listed based upon the age grade group for which the meal is being produced. This is the actual portion size that is served AND/OR the amount of the serving that contributes to meeting the meal pattern requirements.
- Indicate the number of portions planned for each menu item for the grade group specified. Include the total number of portions planned to include reimbursable student meal portions, adult meals portions, and extra sales portions. Enter the respective numbers under the appropriate meal component heading.

Note: If an item is a combination food item, it should be listed in each of the food component categories for crediting toward a reimbursable meal.

Serving Size vs Meal Pattern Contribution

When the serving size is not easily distinguishable to be the same as the meal pattern contribution, both must be indicated

Meats/Meat Alternates	ounce equivalent (oz eq)
Grains	ounce equivalent (oz eq)
Fruits	cups (c)
Vegetables	cups (c)
Milk	cups (c)



The primary difference is that **serving size** refers to the actual physical volume, weight, or piece count of a food item given to a participant, while **meal pattern contribution** (also known as crediting) is the specific amount of a Child Nutrition Program food component that the serving actually satisfies.

The meal pattern contribution tracks how much a food counts toward the required dietary components (Meats/Meat Alternates, Grains, Vegetables, Fruits, and Fluid Milk).

Meal Documentation Information

Documentation Section - complete after meal service

- Total Quantity Prepared
 - Record the quantity prepared or the total number of purchase units prepared based upon the portion sizes, and number of portions planned and served.
- Number of Leftovers
 - Record the number of portions of food or bulk quantity of food leftover based upon the portions sizes
- Number of Meals Served
 - Record the number of meals served for each category
 - Student meals
 - Adults / teachers
 - SFS staff
 - At Costs / 2nd meals



Total quantity prepared should include information such as numbers of total pounds or number of cases with corresponding counts per case, total number of cans and the can size.

Number of leftovers should record the number of portions of food or bulk quantity of food leftover based upon the portions sizes..

For individual portions such as hamburger patties, actual counts should be recorded. For items such as soup, bulk quantities can be listed such as gallons based upon the corresponding portion size.

The number of meals served for each meal type is recorded after meal service.

Note:

- This section is where documentation of the number of student meals claimed for reimbursement is recorded.
- It is important to remember that this data must come from actual meals counted from eligible participants.
- This information may be obtained from meal count forms, register tapes or computer software point of service reports.

Summary

Meals Planned (Projected), Offered (Prepared), Selected (Served), and Leftover

- Planned (projected) number of servings to prepare – provided by menu planner using forecasting tools (reimbursable and non reimbursable combined)
- Planned (projected) quantity of food to use in purchase units – forecasted from past production, standardized recipes and Food Buying Guide. Adjust on day-of-service, if needed
- Actual number of servings offered (prepared) – provides total number of servings prepared with any changes from planned (projected) amounts noted, as needed
- Actual number of servings selected (served) – provides total number of servings selected (served) for each food item on the menu; provides information for forecasting future meal preparation
- Substitutions and leftovers – any substitutions for the planned menu must be recorded. Record the amount of leftovers of each item and planned use (examples: chilled and refrigerated for use in future meal, freeze for future use in cycle menu, or discard)



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Actual number of servings offered (prepared) – provides total number of servings prepared with any changes from planned (projected) amounts noted, as needed

Actual number of servings selected (served) – provides total number of servings selected (served) for each food item on the menu; provides information for forecasting future meal preparation

Substitutions and leftovers – any substitutions for the planned menu must be recorded. Record the amount of leftovers of each item and planned use (examples: chilled and refrigerated for use in future meal, freeze for future use in cycle menu, or discard)

Production Records

The Production Record is a working document that helps with planning, production and meal service, as well as documenting that meals were served by meal type.

A production record should be able to clearly tell the reviewer a story of the beginning, middle, and end of each meal service.



The production record must exactly match the menu. The menu dictates what food components are required, while the production record serves as the official legal and nutritional documentation proving that those exact items were prepared and served in the correct portion sizes.

If you ever make a change to your planned meals, you must update both the menu and the production records accordingly to ensure they align. Discrepancies between what was planned/served and the production records can result in disallowed meals or rejected claims.

Who is responsible for completing production records?

While production records are the primary responsibility of the School Food Service Manager, this recordkeeping typically is a group effort which involves the CNP Director or Supervisor as the menu planner and records must be updated throughout the day with the assistance of SFS clerks, production, and service staff.



While production records are the primary responsibility of the School Food Service Manager, this recordkeeping typically is a group effort which involves the CNP Director/Supervisor as the menu planner and records must be updated throughout the day with the assistance of SFS clerks, production, and service staff. Also, the CNP Director must collect and audit food production records for accuracy to ensure documentation reflects reimbursable meals were served to the eligible students for accurate meal counting and claiming purposes.

Where should production records be stored?

Production records must be stored in a secure and accessible location where staff may reference past information and planned information for completion when needed.

How long must production records be kept on file by SFAs?

Production records must be kept on file for three years plus the current year.



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Production Record: Points to Remember

- Must be maintained daily for breakfast and lunch to document that reimbursable meals were planned and served.
- Has many benefits including menu planning, forecasting, inventory control, identifying student preferences, a communication tool, and help to control food waste.
- A multi-step process. Beginning with the planning section prior to meal service and concluding with the documentation section after meal service.
- Must clearly indicate the age/grade group served.
 - If multiple age/grade groups are served, the record must be built to accommodate multiple age/grade groups or separate production records must be used.
- All sections of the production record must be completed.
 - Reference page 2 of the Production Record form posted on the CNP Website under the Forms section for detailed instructions.



Important points to remember about production records include that:

1. Production records must be maintained daily for breakfast and lunch to document that reimbursable meals were planned and served.
2. Production record keeping has many benefits including menu planning, forecasting, inventory control, identifying student preferences, a communication tool, and help to control food waste.
3. Production records are a multi-step process. Beginning with the planning section prior to meal service and concluding with the documentation section after meal service.
4. Production records must clearly indicate the age/grade group served. If multiple age/grade groups are served, the record must be built to accommodate multiple age/grade groups or separate production records must be used.
5. All sections of the production record must be completed.

Crediting Items and Combination Foods



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Looking at the weight or nutrition facts label on a product, like pizza for example, will not provide the information required to determine the creditable meal pattern contribution: meat/meat alternate, grain, vegetable subgroup, or fruit

In order to document reliable crediting information and ensure valid documentation is available upon audit, a CN label, product formulation statement, or standardized recipe must be maintained on file and specified on the item details on the production record.

CN Labels and Product Formulation Statements

- It is important to note that if an item is processed or a commercially prepared combination food item, a Child Nutrition (CN) label or product formulation statement (PFS) is required in order to credit the food item in the Child Nutrition Program.
- Each item listed on the production record should clearly identify one of the following 3 things for a combination item to be creditable:
 - 1) CN Label #
 - 2) Product Formulation Statement Reference
 - 3) Standardized Recipe #

The documentation to support the meal pattern contribution should be on file and accessible for each item.



CN Labels, factsheets, and product labels provide a way for food manufacturers to communicate with school program operators about how their products may contribute to the meal pattern requirements for meals served under USDA's Child Nutrition Programs. Note that it is vital that a CN number, Product Formulation Statement referenced name, or recipe name and number must be included in an item's details on the production record in order for the food items and/or components to be creditable for the USDA CNP Meal Pattern. Without this information, an SFA cannot prove that reimbursable meals were served to students for claiming purposes.

Additional Resources



Paper Production Record - Templates

LDOE has taken feedback from SFAs and the results of findings during Administrative Reviews to update production record templates for breakfast and lunch.

The templates are available in word format for SFAs to customize to fit the SFAs needs.

[The templates](#) can be found on the Resource Library in the CNP website:

- NSLP Production Record and Templates
- SLP Production Record and Templates



Food Buying Guide for Child Nutrition Programs



The Food Buying Guide (FBG) is the essential resource for food yield information for all Child Nutrition Programs

<https://www.fna.usda.gov/tn/fbg>

The FBG assists CNP operators with:

- Purchasing the correct amounts of foods for CNP
- Determining the contribution that each food makes toward meal pattern requirements

Foods listed in the Food Buying Guide are not required to have a CN Label or a manufacturer's Product Formulation Statement

- The SFA should document and provide the a copy of the FBG information that was used to determine the crediting as documentation for the AR



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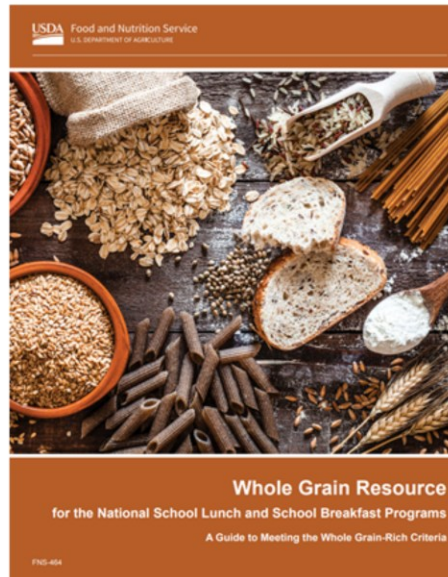
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The SFA should document and provide the a copy of the FBG information that was used to determine the crediting as documentation for the AR.

WHOLE GRAIN RESOURCE



USDA has published the Whole Grain Resource for the National School Lunch and School Breakfast Programs. This resource will assist you in meeting the Whole Grain-Rich Criteria. It can be downloaded from the CNP website and is linked to the title at the top of this slide. As discussed earlier in this training, when whole grain-rich requirements are met, be certain this is clearly identified for the bread/grain item listed on the production record.

Footnote: Footnote 3 or 4 = Red, Footnote 5 = Blue

Exhibit A: Grain Requirements for Child Nutrition Programs^{1,2}
Color Key Footnote: Footnote 3 or 4 = Red, Footnote 5 = Blue

at the National School Lunch Program (NSLP), School Breakfast Program (SBP) (grades K-12), and NSLP afternoon snacks (by July 1, 2025), at least 80 percent of the weekly grains offered must meet the whole grain-rich criteria and the remaining grain items offered must be made from whole grain flour, enriched, or whole grain, or be an enriched product, such as enriched bread, or a fortified cereal. Please note: State agencies have the discretion to set stricter requirements than the minimum nutrition standards for school meals. For additional guidance, please contact your State agency. For all other Child Nutrition Programs, grains must be whole grain-rich, enriched, or whole grain, or be an enriched product, such as enriched bread, or a fortified cereal. Under the Child and Adult Care Program (CACFP) (child and adult meal patterns) and the NSLP SBP (breakfast meal pattern), grains must be whole grain-rich, enriched, or whole grain, or be an enriched product, such as enriched bread, or a fortified cereal. For the NSLP SBP (grades K-12), NSLP afternoon snacks, and CACFP, and NSLP SBP (summer food and preschool meals) grain quantities are determined using ounce equivalents (oz eq). Summer Food Service Program (SFP) may determine grain quantities using grains/breads servings. Some of the following information may be helpful to determine grain-rich, whole grain-rich, and/or fortified grains. This should be a consideration when deciding how often to serve them.

4 Allowed in NSLP (up to 2.0 or eq grain-based dessert per week for grades K-12) as specified in §210.10 and at snack service in SFSP. Considered a grain-based dessert and cannot count toward the grains component in CACFP or NSLP after-school snacks (effective July 1, 2025), or NSLP/SBP infant and preschool meals as specified in §2226.20(a)(4) and 210.10.

⁶ Allowed in NSLP up to 2.0 oz as grain-based dessert per week in grades K-12 as specified in §27030 and at snack service in CSPF.⁸ Considered a grain-based dessert and cannot count toward the grains component in CACFP. NSLP afternoon snacks (effective July 1, 2020), or NSLP infant and preschool meals are considered in §§2626, 2604(a) and 2610.

⁷ The NSLP and SBP do not have a limit on serving size for supplements served to children aged 1 through 5 in the NSLP; breakfast served in the SBP, and meals served to children ages 1 through 5 and adult participants in the CACFP. Breakfast cereals are traditionally served as a breakfast menu item but are not counted against the grains component.

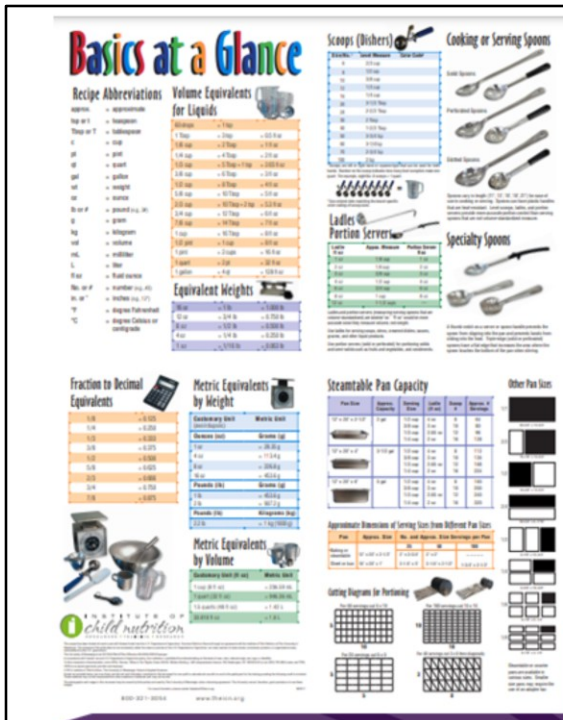
⁸ In the NSLP and SBP, cereals that list a whole grain as the first ingredient must be fortified. If the cereal is 100% whole grain, fortification is not required. For all Child Nutrition Programs, cereals must be whole-grain, enriched, or fortified.

⁹ Effective October 1, 2020, cereals served in NSLP, SBP, and NSLP after-school snacks must contain no more than 6 grams of added sugars per dry ounce.

¹⁰ Effective October 1, 2020, cereals served in CACFP and NSLP infant and preschool meals must contain no more than 6 grams of added sugars per dry ounce. Prior to October 1, 2020, breakfast cereals served in the CACFP must contain no more than 6 grams of total sugars per dry ounce.

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Basics at a Glance

The Institute of Child Nutrition developed a printable poster called [Basics at a Glance](#)

This resource should be used along with the USDA Food Buying Guide to produce, document and serve reimbursable meals

The Basics at a Glance provides recipe abbreviations, volume equivalents for liquids, equivalent weights, ladles to select based on portions for service, pan capacity, etc.



The Institute of Child Nutrition developed a printable poster called “[Basics at a Glance](#)”. This reference should be used as part of meal planning along with production record documentation to ensure correct utensils and small wares are used based on standardized recipe yield and serving sizes desired for meal service.

This resource should be used along with the USDA Food Buying Guide to ensure meals are reimbursable and served correctly.

The Basics at a Glance provides recipe abbreviations, volume equivalents for liquids, equivalent weights, ladles to select based on portions for service, pan capacity, etc.

As an example, A common error in service and documentation of serving sizes is in determining the correct scoop size to use for a ½ cup serving or other volume serving. If production staff is using standardized recipes but the service staff is often running out of food, the wrong scoop or ladel size could be the problem.

To prevent this kind of error, ask CNP production and service staff to use the scoop number guide on this poster to determine the correct scoop to use for the portion size listed on a recipe.

Questions

Contact the
LDOE Division of Nutrition Support
(225) 342-9661
childnutritionprograms@la.gov

