



# CACFP Training Resources Sponsoring Organizations

## Child Care, Head Start, Outside of School Hours, Emergency Shelters

USDA requires sponsoring organizations (agencies with more than one site participating on the CACFP) to conduct CACFP training for key staff from every site before they are held responsible for tasks and annually thereafter.

**This checklist identifies key staff who must be trained on each topic and resources that can be used to train.**

- Check the box(es) to indicate the DPI resources used for training
- Keep this completed CACFP Training Resources and [CACFP Training Checklist](#) on file

<b>CACFP E-Learning Course</b>	Lessons in the E-Learning Course provide instruction on many CACFP requirements. Completing lessons can help meet the requirements for training key staff. Some topics do not have an E-Learning lesson. Click on the link to access the Course: <a href="#">Child Care Centers, Outside of School Hours, Emergency Shelters, and Head Starts</a>
<b>Guidance Memorandums (GM)</b>	The GMs referenced below provide CACFP requirements, resources, and forms for each topic. Use this information to train staff. Click on the <a href="#">GM Webpage</a> to access the GMs for <b>Child Care Component</b> (child care, head start, outside of school hours) or <b>Emergency Shelter component</b> .

**Monitors must be trained on all topics where they are indicated as Key Staff.**

1. Civil Rights		
<b>Key Staff:</b> All staff		
Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> <li>• Equal treatment for all participants</li> <li>• Knowledge of rights and responsibilities</li> <li>• Elimination of illegal barriers that prevent or deter people from receiving benefits</li> <li>• Dignity and respect for all</li> </ul>		GM 8: Review one of these two resources with staff: <input type="checkbox"/> <a href="#">CACFP Civil Rights Training Handout</a> <input type="checkbox"/> <a href="#">Civil Rights Training PowerPoint</a>
2. CACFP Meal Pattern		
<b>Key Staff:</b> Food preparers; Teachers present at meal time; Staff who plan menus, complete production records, purchase food, help serve meals, and/or review menus to verify meals meet the meal pattern; Monitors		
Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> <li>• Required meal and snack components</li> <li>• Required serving sizes for each age group</li> <li>• Serving requirements for meal service method used (pre-plated, family-style dining, or cafeteria-style)</li> <li>• Requirements and documentation for special dietary needs requests</li> </ul>	<b>Children Ages 1-18</b> <input type="checkbox"/> <a href="#">CACFP Meal Pattern (1-18 Yrs)</a> <input type="checkbox"/> <a href="#">Meal Service Styles</a>	Review in GM 12: <input type="checkbox"/> <a href="#">CACFP Meal Pattern (Ages 1-18)</a> <input type="checkbox"/> <a href="#">Meal Service Styles</a>
	<b>Infants</b> <input type="checkbox"/> <a href="#">Infant Meal Pattern</a> <input type="checkbox"/> <a href="#">Creditable Infant Foods</a>	Review in GM 12: <input type="checkbox"/> <a href="#">Infant Meal Pattern and Grains Chart</a> <input type="checkbox"/> <a href="#">Foods for Infants</a>
	<b>Special Dietary Needs</b> <input type="checkbox"/> <a href="#">Special Dietary Needs Requests</a>	Review in GM 12: <input type="checkbox"/> <a href="#">Special Dietary Needs and the CACFP</a>
3. Time of Service Meal (TOS) Counts		
<b>Key Staff:</b> Staff who complete time of service (TOS) meal counts; Staff who supervise those who complete meal counts; Staff who compile claims; Monitors		
Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> <li>• Record at time of service or immediately after</li> <li>• Do not record before a meal/snack based on the # of participants expected to eat</li> <li>• Do not record based on attendance records</li> <li>• Do not count a participant when served an incomplete meal</li> <li>• Do not claim meals served to adults</li> <li>• Only record a meal/snack when the program supplies all or all but one component (family supplies only one component)</li> </ul>	<b>Children Ages 1-18</b> <input type="checkbox"/> <a href="#">Meal Counts</a>	Review template meal count forms in GM 9: <input type="checkbox"/> <a href="#">Meal Count Form (Three or Less Meals) or</a> <input type="checkbox"/> <a href="#">Greater Than Three Meals Record</a>
	<b>Infants</b> <input type="checkbox"/> <a href="#">Infant Recordkeeping &amp; Claiming Requirements</a>	Review in GM 12: <input type="checkbox"/> <a href="#">Infant Meal Form (B, L, Snack) or</a> <input type="checkbox"/> <a href="#">Infant Meal Form (All Meals)</a>



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4. Recordkeeping Requirements		
Review <a href="#">Required Documents List</a>		
Menus and Production Records (PR)		
<b>Key Staff:</b> Staff who plan menus, complete production records, and purchase food; Monitors		
Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> <li>Menus must include all food items served to meet meal pattern requirements. See <i>Menu Checklist</i> for details. Document substitutions on menu kept with claim.</li> <li>Maintain support documentation for whole grain-rich items, cereal, yogurt, and tofu</li> <li>Complete daily production records for each approved meal service, including all food substitutions (N/A for Emergency Shelters)</li> <li>List all meal components and total amounts prepared on production records; use one of the Production Record forms listed under GM12</li> <li>Indicate “HM” for homemade combination dishes and “CN” for foods that are CN labeled</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>CACFP Meal Pattern (1-18 Yrs)</i></li> <li><input type="checkbox"/> <i>Production Planning</i></li> </ul>	Review in GM 12: <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Meal Requirements Calculator</a></li> <li><input type="checkbox"/> <a href="#">Food Buying Guide (FBG) Calculator</a></li> <li><input type="checkbox"/> <a href="#">FBG Calculator Instructions</a></li> <li><input type="checkbox"/> <a href="#">Production Record (PR) Instructions</a></li> <li><input type="checkbox"/> <a href="#">PR: Breakfast, Lunch/Supper, Snack</a></li> <li><input type="checkbox"/> <a href="#">PR: Daily (All Meals)</a></li> <li><input type="checkbox"/> <a href="#">Menu Checklist</a></li> </ul>
Enrollment and Income Eligibility Information (Does not apply to Emergency Shelters)		
<b>Key Staff:</b> CACFP Administrative Staff; Monitors		
Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> <li>CACFP Enrollment form, or other approved form, on file for all participants</li> <li>Valid Household Size Income Statement (HSIS) on file for participants claimed as free/reduced</li> <li>Participant eligibility (F, R, N) is recorded on Household Size Income Record (HSIR)</li> <li>Participants without a valid HSIS, or those over eligibility requirements, are marked as non-needy on HSIR</li> <li>Sites with children in Head Start (HS): Documentation from HS official, certifying HS enrollment, serving as verification of eligibility as Free in place of collecting HSIS</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Household Size Income Statements (HSIS)</i></li> <li><input type="checkbox"/> <i>Household Size Income Record (HSIR)</i></li> </ul>	Review in GM 6: <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">CACFP Enrollment Form</a></li> </ul> Review in GM 1: <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">Household Size Income Statement</a></li> <li><input type="checkbox"/> <a href="#">Instructions for Determining HSIS</a></li> <li><input type="checkbox"/> <a href="#">Household Size Income Record</a></li> <li><input type="checkbox"/> <a href="#">HSIR Instructions</a></li> </ul>
Attendance		
<b>Key Staff:</b> Teachers/staff who maintain attendance records; Monitors		
Key Points to Understand		
<ul style="list-style-type: none"> <li>CCI, Head Start, and Outside of School Hours Sites: Maintain daily attendance records of participants attending sites. Assure accurate sign in/out times.</li> <li>Emergency Shelters: Maintain daily roster of participants residing at site. Daily rosters must include participant’s name and date of birth.</li> </ul>		
Income and Expense Records		
<b>Key Staff:</b> Staff with financial recordkeeping responsibilities		
Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> <li>CACFP funds must only be used to pay for allowable costs</li> <li>Dated and itemized receipts/invoices on file and accessible</li> <li>Track CACFP costs and revenues (ex. General Ledger)</li> <li>Submit <i>CACFP Financial Report</i> that includes <b>actual</b> expenses paid with CACFP reimbursement</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <i>Financial Management</i></li> <li><input type="checkbox"/> <i>Quarterly Financial Reports</i></li> </ul>	Review in GM 11: <ul style="list-style-type: none"> <li><input type="checkbox"/> <a href="#">CACFP Training Spotlight: CACFP Costs</a></li> </ul>



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## 5. Claim Submission

<b>Key Staff:</b> Staff who compile and submit claims		
Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> <li>Multiple people review all forms (meal counts, menus, attendance records, HSIS, HSIR) and the compiled claim for accuracy, prior to submission</li> </ul>	<input type="checkbox"/> <i>CACFP Claims or CACFP Claims- Emergency Shelters</i> <input type="checkbox"/> <i>Claim Edit Checks</i>	Review in GM 3: Claim Form Instructions: <input type="checkbox"/> <a href="#">Child Care, Outside of School Hours, Head Start</a> or <input type="checkbox"/> <a href="#">Emergency Shelters</a> <input type="checkbox"/> <a href="#">Meal Edit Checks</a>

## 6. Monitoring Procedures

<b>Key Staff:</b> All staff with CACFP responsibilities; Monitors	
Key Points to Understand	GM
<ul style="list-style-type: none"> <li>Train staff on how monitors will review sites (3x/year, announced or unannounced, during a meal service) and that all CACFP records (i.e. meal counts) must be available to the monitor</li> <li>DPI, USDA and other State and Federal officials have the ability to make announced or unannounced reviews during normal hours of operation. All CACFP records must be available to these officials.</li> </ul>	<input type="checkbox"/> GM 5: Monitoring Requirements section

## 7. Reimbursement System

<b>Key Staff:</b> Staff who compile and submit claims; Financial staff	
Key Points to Understand	GM
<ul style="list-style-type: none"> <li>Identify current Federal reimbursement rates, including Cash-in-Lieu of USDA Foods</li> <li>Understand claiming percentage method to determine amount of reimbursement</li> </ul>	Review in GM 2: <input type="checkbox"/> <a href="#">Reimbursement calculation worksheet</a> or <input type="checkbox"/> <a href="#">Reimbursement calculation worksheet -Emergency Shelters</a>

## Monitors

Key Points to Understand	E-Learning Lesson	GM
<ul style="list-style-type: none"> <li>All materials and topics above where monitors are identified as Key Staff</li> <li>Monitoring requirements (time frame, announced/unannounced, meal observation, identifying serious deficiencies and imminent threat to health and safety)</li> <li>How to complete the <i>CACFP Preoperational Visit Form, Site Review Form</i> and <i>Monitoring Tracking Form</i></li> </ul>	<input type="checkbox"/> <i>Monitoring</i>	Review in GM 5: <input type="checkbox"/> <a href="#">Preoperational Visit Form</a> <input type="checkbox"/> <a href="#">Site Review Form</a> <input type="checkbox"/> <a href="#">Monitoring Tracking Form</a> <input type="checkbox"/> <a href="#">Imminent Threat and Serious Deficiencies</a>