



FDCH 2023 Training

August 30, 2023

Monitoring Staff
1:00 PM – 3:00 PM



Monitoring Staff Welcome

Monitors joining via MS Teams (1-3:00 PM)

Overview...

- Crediting processed meats & store-bought combination items
- Whole-grain Rich Foods
- Using the *Home Visit Menu and Product Documentation Log*
- Using the *Home Visit Infant Review Log*
- Required Home visit Form documentation

Crediting Processed Meats/Meat Alternates

Crediting Processed Meats/Meat Alternates

- Certain products that credit as meat/meat alternates do not require a CN label or product formulation statement (PFS) if the product is 100% meat

Processed meat/meat alternates in the table to the right do not require a CN Label or PFS when ingredients are 100% creditable meat ingredients (may contain salt and seasoning). However, if these items contain binders/extenders, fillers, byproducts, or cereals (see below) they are not 100% meat and require a CN label or PFS.*

- Beef patties
- Bologna
- Hot dogs
- Vienna sausage

Crediting Processed Meats/Meat Alternates

- Some products to credit as a meat/meat alternate must have a CN label or PFS from the manufacturer

[DPI's CACFP Creditable and Non-Creditable Foods Guide: 1-18 Year Olds](#)

Processed Meat/Meat Alternates

Processed meat/meat alternates in the table below are **ONLY** creditable with a CN Label or PFS.*

This is not all-inclusive list of foods that require a CN Label or PFS.

<ul style="list-style-type: none">• Dried and semi-dried meat, poultry, and seafood snacks, shelf-stable, such as jerky or summer sausage• Liverwurst• Meat loaf	<ul style="list-style-type: none">• Meat analogs (breakfast links, textured vegetable protein crumbles, veggie burgers)• Meat/poultry sticks (not dried/semi-dried)• Meatballs	<ul style="list-style-type: none">• Pepperoni (traditional, turkey)• Polish sausage• Salami• Salisbury Steak• Sausage not labeled "fresh pork sausage" / "fresh Italian sausage"	<ul style="list-style-type: none">• Soy cheese• Soy products (soy sausage, veggie burgers)• Tofu products (links, sausages)• Turkey bacon
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Crediting Foods

Crediting processed meats & store-bought combination items

- Required to have a CN label or Product Formulation Statement (PFS) from the manufacturer

Common products found during HV's

- Corn dogs
- Chicken nuggets/tenders
- Frozen pizza
- Fish Sticks
- Macaroni & cheese/heat-n-serve pasta dishes

092337

Five 0.66 oz. fully cooked whole grain chunk-shaped chicken patty fritters provide **2.00 oz. equivalent meat/meat alternate and 1.00 oz. equivalent grains** for the Child Nutrition Meal Pattern Requirements. (Use of this logo and statement authorized by the Food and Nutrition Service, USDA 02/21).

Manufacturer Name		Product Formulation Statement			
Product Name: <u>Uncooked Breaded Chicken Breast Tenderloins</u>		Code No: <u>020496-0928</u>			
Manufacturer: <u>Tyson Foods, INC</u>		Case/Pack/Count/Portion/Size: <u>/ 3 (1.85 oz.) Pieces</u>			
L. Meat/Meat Alternate					
Please fill out the chart below to determine the creditable amount of Meat/Meat Alternate					
	Description of Food Buying Guide	Ounces per Raw Portion of Creditable Ingredient	Multiply	FBG Yield	Creditable Amount *
Chicken	CHICKEN TENDERS	1.340388	X	0.73	0.97848324
Total					0.97848324

* Creditable Amount - Multiply ounces per raw portion of creditable ingredient by the FBG Yield Information

A serving of 3 chicken tenders provides 2 ounces of meat/meat alternate.

Crediting Foods

Store-bought Combo Items - Crediting the Grain Component

- Corn dogs
- Chicken nuggets/tenders
- Frozen pizza
- Fish Sticks
- Macaroni & cheese/heat-n-serve pasta dishes

CN label / PFS crediting information is required to count the grain component too!

_____ CN _____

092337

CN Five 0.66 oz. fully cooked whole grain chunk-shaped chicken patty fritters provide **2.00 oz. equivalent meat/meat alternate and 1.00 oz. equivalent grains** for the Child Nutrition Meal Pattern Requirements. (Use of this logo and statement authorized by the Food and Nutrition Service, USDA 02/21). CN

_____ CN _____

Product Formulation Statement for Grains Products
(Contracting entities must retain a copy of the label from the product package in addition to the following information on the manufacturer's letterhead that is signed by an official company representative.)

Product Name: Fully Cooked "Buffalo Style" Chicken Breast Bites Code No.: 40030 WG

Manufacturer: John Soules Foods Acquisitions dba ProView Foods Serving Size: 4.00 oz (4 PC) (amount)

I. Does the product meet the Whole Grain-Rich Criteria: Yes No

II. Does the product contain non-creditable grains: Yes No If yes, how many grams: _____

III. Use Policy Memorandum SP 30-2012 Grain Requirements for the National School Lunch Program and School Breakfast Program:

Crediting Foods

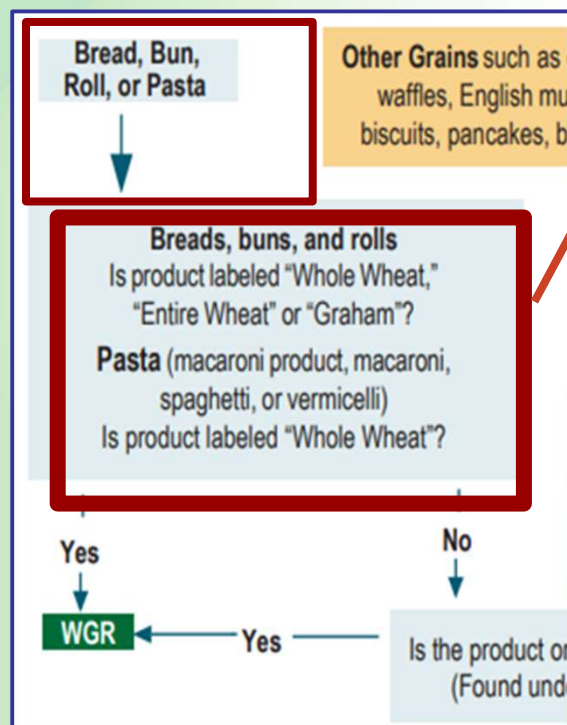
Crediting processed meats & store-bought combination items

USDA's Child Nutrition Verification Report must not be used

Child Nutrition (CN) Label Verification Report						
CN #	Est #	Product Description	Serving Size	CN Crediting	Expiration	Company Name
024815	717W	FARMLAND SILVER MEDAL BRAND HOT DOGS	Each 2.00 oz. Hot Dog	2.00 oz. Equivalent Meat	6/17/2024	SMITHFIELD FARMLAND CORP.
024860	717W	FARMLAND GOLD MEDAL HOT DOG	Each 2.00 oz. Hot Dog	2.00 oz. Equivalent Meat	6/17/2024	SMITHFIELD FARMLAND CORP.
025745	420	GOURMET SCRAMBLED EGG SYSTEM FROZEN EGG PRODUCT	One lb. (16.00 oz.) Egg Mix	14.03 oz. Equivalent Meat Alternate	2/22/2026	MICHAEL FOODS EGG PRODUCTS COMPANY
035058	420	GFS FROZEN WHOLE EGGS	One lb. (16.00 oz.) Eggs	18.00 oz. Equivalent Meat Alternate	8/8/2027	MICHAEL FOODS EGG PRODUCTS COMPANY


Crediting as WGR

Identifying Grains as Whole-Grain Rich



If the bread, bun, roll or pasta product is labeled “whole wheat” “entire wheat” or “graham”, you do NOT need to proceed to the Rule of Three!

If the grain product contains the FDA health claim, you do NOT need to proceed to the Rule of Three!

FDA health claims? 

“Diets rich in whole grain foods and other plant foods and low in total fat, saturated fat, and cholesterol may reduce the risk of heart disease and some cancers.”

“Diets rich in whole grain foods and other plant foods, and low in saturated fat and cholesterol, may help reduce the risk of heart disease.”

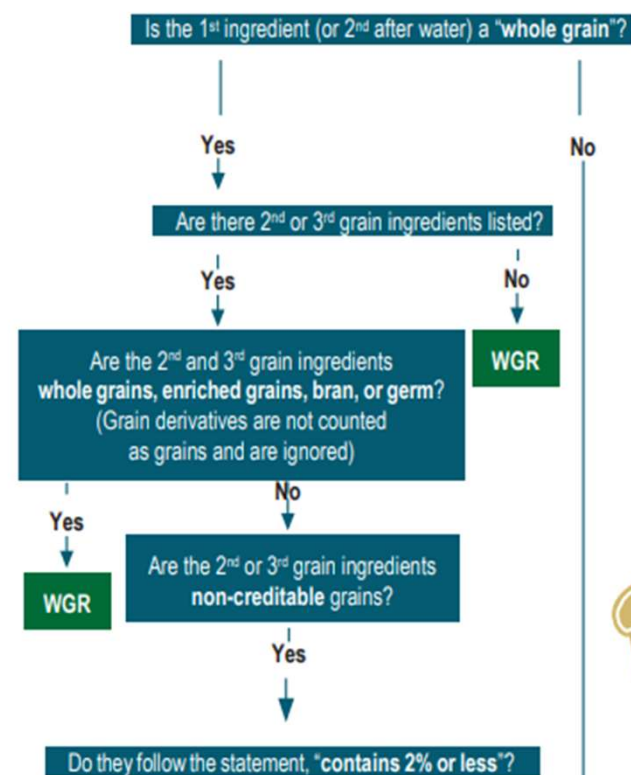
The Whole Grain stamp is not an acceptable determining factor



Crediting as WGR

Rule of Three

Use the grains list at right when using this flowchart.



Other Grains such as crackers, bagels, waffles, English muffins, tortillas, biscuits, pancakes, breadsticks, etc.

[CACFP Reference Guide](#)
[Grain Ingredient List](#)

HV Menu & Product Review Log



Home Visit (HV) Menu & Product Review Log

Menu Review = Review entire month of most recent claim & current month up to HV date

Menu Review
In this column list items on menus OR mark HV# (1,2,3) if already listed from previous HV
Mark HV# (1,2,3) when item is on reviewed menus

Compare Menu Items to Foods On-hand @each HV
Menu item have foods on-hand? Y/N

HV 1 Date	HV 2 Date	HV 3 Date

Foods On-Hand @ HV
In this column list brands/names of each food on-hand OR if already listed from previous HV, mark HV# (HV1,HV2,HV3)
Mark HV# (HV1,HV2,HV3) when food is on-hand

If item is creditable



Home Visit (HV) Menu & Product Review Log (Version 1)

Provider Name _____ Provider # _____ FFY 20 _____

FOLLOW ADDITIONAL INSTRUCTIONS FOR THIS LOG

- "N" (No) answers for Step 3 require follow up
- Non-creditable foods must be cited as finding & have possible meal disallowances

Step 1 (left column) - Menu Review	Step 2 (right column) - Review Foods On-Hand @ HV	Step 3 (middle column) - Compare Menu Items to Foods On-hand
a. Review entire month of most recent claim & current month up to HV date b. List items on menus → List each menu item only 1 time throughout the 3 HVs c. Mark the # (1,2,3) on the left for each HV the item is on the reviewed menus for	a. List each food on-hand with their specific brand/name → List each specific food (brand/name) on-hand only 1 time throughout the 3 HVs b. Mark # (HV1,HV2,HV3) for each HV the specific food (same brand/name) is on-hand c. <input checked="" type="checkbox"/> in far right column if food is creditable → If non-creditable food is served on HV day, disallow the meal & cite as finding d. Check if foods are on-hand for menu items marked "N" in middle column at prior HV. → Further action is required if still "N"	a. Record HV date at top of column b. Compare menu items in Step 1 column to foods on-hand in Step 2 column with the same HV# c. Mark Y if the menu item has foods on-hand at that HV#. Mark N if not → "N" requires follow-up at next HV

Store-Bought Combination Foods Ex. Chix nug., meatballs, lasagna

	HV 1	HV 2	HV 3	HV 1	HV 2	HV 3	HV 1	HV 2	HV 3	CN Label /PFS
1	Y	N	Y	N	Y	N				
2										
3										
1	Y	N	Y	N	Y	N				
2										
3										
1	Y	N	Y	N	Y	N				
2										
3										
1	Y	N	Y	N	Y	N				
2										
3										
1	Y	N	Y	N	Y	N				
2										
3										
1	Y	N	Y	N	Y	N				
2										
3										
1	Y	N	Y	N	Y	N				
2										
3										
1	Y	N	Y	N	Y	N				
2										
3										
1	Y	N	Y	N	Y	N				
2										
3										

UPDATE
Use Updated Log Form starting 10/1/23

Step 1	HV 1 Date	HV 2 Date	HV 3 Date	Step 3	Step 2
Items on Reviewed Menus				Foods On-Hand @ HV (May not align with menu item in left column)	
Store-Bought Combo Foods (Chix nug. lasagna) / Processed Meats (meatballs)					CN Label /PFS
1	Y	N	Y	N	
2					
3					
1	Y	N	Y	N	
2					
3					
1	Y	N	Y	N	
2					
3					
1	Y	N	Y	N	
2					
3					
Yogurt	Sugar Limit = ≤ 23 grams/6 oz.			≤ Sugar Limit	
1	Y	N	Y	N	
2					
3					
1	Y	N	Y	N	
2					
3					
Cheese cannot be labeled as product; sauce must have CN. Tofu must have 5 gr. protein/ 2.2 oz					
Cheese / Tofu	Only List Non-creditable cheese/tofu				
1	Y	N	Y	N	
2					
3					
1	Y	N	Y	N	
2					
3					

HV Menu & Product Review Log

Home (HV) Visit Menu and Product Review Log (Version 2) Provider Name _____ Provider # _____ FFY 20__

FOLLOW ADDITIONAL INSTRUCTIONS FOR THIS LOG ←

- Menu Review = Review entire month of most recent claim & current month up to HV date
- Non-creditable Foods must be cited as finding & have possible meal disallowances
- "N" (No) answers require follow up

OLD

Home (HV) Visit Menu and Product Review Log (Version 2) Provider Name _____ Provider # _____ FFY 20__

•Menu Review = Review entire month of most recent claim & current month up to HV date

Home Visit 1: Date _____

WGR Items -- List WGR cereals in section below

Menu Review		Grains On-Hand @ HV	
List items marked as WGR on menus	Items in 1 st column on-hand?	List names/brands of grains on-hand @ HV	WGR
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>

Cereals (Sugar Limit = 56 g sugar/dry oz.) Not on menu

Menu Review		Cereals On-Hand @ HV	
List cereals on menus	Cereals in 1 st column on-hand?	List cereals on-hand @ HV	WGR
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>

Store-Bought Combo Items (Ex. Chicken nug., meatballs)

Menu Review <input type="checkbox"/> Not on menu		Foods On-Hand @ HV	
List items on menus	Items in 1 st column on-hand?	List names/brands of foods on-hand @ HV	CN Label/PFS
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>
Y	N		<input checked="" type="checkbox"/>

UPDATE
Use
Updated
Log Form
starting
10/1/23

Home Visit 3: Date _____

Menu Review		Items in 1 st column on-hand?	Foods On-Hand @ HV		
List WGR Items on Menu	List WGR cereals in section below	Y	N	List new brands & names of grains on-hand	WGR
		Y	N		<input checked="" type="checkbox"/>
		Y	N		<input checked="" type="checkbox"/>
		Y	N		<input checked="" type="checkbox"/>
		Y	N		<input checked="" type="checkbox"/>

List Cereals on Menu (Sugar Limit = 56 g sugar/dry oz.)		List NEW kinds & brands of cereals On-hand		≤ Sugar Limit	WGR
<input type="checkbox"/> Not on menu	Y	N		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Y	N		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Y	N		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Y	N		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Y	N		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Items / Processed meats		kinds & brands On-Hand		PFS
<input type="checkbox"/> Not on menu	Y	N		<input checked="" type="checkbox"/>
	Y	N		<input checked="" type="checkbox"/>
	Y	N		<input checked="" type="checkbox"/>
	Y	N		<input checked="" type="checkbox"/>
	Y	N		<input checked="" type="checkbox"/>

Yogurt (dairy and/or soy) (Sugar Limit = 23 g sugar/6 oz)		List kinds & brands of yogurt On-hand @ HV		≤ Limit
Menu Review <input type="checkbox"/> Not on menu	Y	N		<input checked="" type="checkbox"/>
	Y	N		<input checked="" type="checkbox"/>

Cheese (Cannot be cheese product; sauce must have CN)		Only list kind/brand of non-creditable cheese on-hand @ HV	
Menu Review <input type="checkbox"/> Not on menu	Y	N	
	Y	N	

Tofu (5 gr protein/2.2 oz)		Only list kind/brand of non-creditable tofu On-Hand	
Menu Review <input type="checkbox"/> Not on menu	Y	N	
	Y	N	

NEW

CHANGES
9/29/23

HV Menu & Product Review Log

Yogurt

Changed **FROM:** Listing only yogurts that exceed sugar limit
TO: Listing all yogurts on-hand & marking whether they meet the sugar limit

FROM:

Step 1	Step 3			Step 2
Items on Reviewed Menus	HV 1 Date	HV 2 Date	HV 3 Date	Foods On-Hand @ HV (May not align with menu item in left column)
Yogurt Sugar Limit= \leq 23 grams/dry 6 oz.				LIST YOGURTS THAT EXCEED SUGAR LIMIT
Served on menus?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Yogurt on-hand?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
\leq sugar limit <input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>

VERSION 1

TO:

Step 1	Step 3			Step 2
Items on Reviewed Menus	HV 1 Date	HV 2 Date	HV 3 Date	Foods On-Hand @ HV (May not align with menu item in left column)
Yogurt				Sugar Limit= \leq 23 grams/6 oz. <input type="checkbox"/> Sugar Limit
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HV 1
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HV 2
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HV 3

VERSION 2

Yogurt (Sugar Limit = \leq 23 g sugar per 6 oz.)	<input type="checkbox"/> Not on menu
If on menu, on-hand @HV:	<input type="checkbox"/> Y <input type="checkbox"/> N
\leq sugar limit <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
List yogurts THAT EXCEED SUGAR LIMIT:	<input checked="" type="checkbox"/>

Menu Review	Items in 1 st column on-hand?		Foods On-Hand @ HV
Yogurt (dairy and/or soy) Sugar Limit = \leq 23 g sugar/6 oz.			List kinds & brands of yogurt On-hand @ HV <input checked="" type="checkbox"/> \leq Limit
Menu Review	<input type="checkbox"/> Y	<input type="checkbox"/> N	
<input type="checkbox"/> Not on menu			

CHANGES
9/29/23

HV Menu & Product Review Log

Cheese & Tofu

Changed **FROM:** Listing all cheeses & tofu on-hand & marking whether they are creditable

TO: Listing only cheeses and tofu on-hand that are not creditable

FROM:

Step 1	Step 3			Step 2			
Items on Reviewed Menus	HV1 Date	HV2 Date	HV3 Date	Foods On-Hand @ HV (May not align with menu item in left column)			
Cheese (cannot be cheese product, sauce w/out CN) / Tofu (5 gr. protein/2.2 oz.)							Cred? <input checked="" type="checkbox"/>
1	Y	N	Y	N	Y	N	HV1
2							HV2
3							HV3
1	Y	N	Y	N	Y	N	HV1
2							HV2
3							HV3
1	Y	N	Y	N	Y	N	HV1
2							HV2
3							HV3

VERSION 1

Step 1	Step 3			Step 2			
Items on Reviewed Menus	HV1 Date	HV2 Date	HV3 Date	Foods On-Hand @ HV (May not align with menu item in left column)			
Cheese cannot be labeled as product, sauce must have CN. Tofu must have 5 gr. protein/ 2.2 oz.							
Cheese / Tofu				Only List Non-creditable cheese/tofu			
1	Y	N	Y	N	Y	N	HV1
2							HV2
3							HV3
1	Y	N	Y	N	Y	N	HV1
2							HV2
3							HV3

TO:

VERSION 2

Menu Review <input type="checkbox"/> Not on menu	Foods On-Hand @ HV		
List items on menus	Items in 1 st column on-hand?	List NEW foods & their names/brands on-hand @ this HV	
Cheese (cannot be cheese product) / Tofu (5 gr. protein/2.2 oz.)			
	Y	N	
	Y	N	

Menu Review	Items in 1 st column on-hand?		Foods On-Hand @ HV
product; sauce must have CN)			creditable cheese on-hand @ HV
Menu Review <input type="checkbox"/> Not on menu	Y	N	
Tofu (5 gr. protein/2.2 oz.)			Only list kind/brand of non-creditable tofu On-Hand
Menu Review <input type="checkbox"/> Not on menu	Y	N	

Using / Retaining HV Review Logs

HV Menu & Product Review logs & [HV Infant Review Log](#)

At the beginning of each year (FFY) effective October 1st:

- Each sponsor: choose [Version 1](#) OR [Version 2](#) of *HV Menu & Product Review Log forms* to be used by monitors for the duration of FFY
- Use same log form for all 3 HVs during FFY (October - September)
→ *Do not start a new log form at each HV - it is intended to capture review activity for all 3 HVs in the FFY*
- If short on space, add log form pages to continue the log information running for duration of FFY (*keep all pages for FFY together*)
- Retain logs with each provider's monitoring records in accordance with the 3-year record retention rule (*Current & prior 3 FFYs*)

14

HV Menu & Product Review Log

Overview

Record on the log:

1. Foods served on menus
2. Foods on-hand
3. Whether foods meet crediting criteria
4. Whether each food on menu has food(s) on-hand

Transfer from log to HV Review Form:

1. Foods not meeting crediting criteria as findings
2. Disallowances
3. Menu items with no foods on-hand (for follow-up either before or at next HV)



HV Menu & Product Review Log

Overview - Menu Review

Review Menus (prior & current month to date)

→ Identify and list the following:

- All grains served as WGR
- Cereals
- Yogurt if served
- Potential store-bought combo items
- Processed meats potentially requiring CN label/PFS
- Cheese
- Tofu

UPDATE for 2024 - Starting 10/1/2023:

The following items must also be identified on menus & foods on-hand checked:

- **Cheese** - check for creditable cheeses (cheese product is not)
- **Processed meats** that potentially require CN label/PFS

Commonly missed items:

Polish Sausage (i.e., Kielbasa), turkey bacon, meatballs, potential heat-n-serve pasta dishes (i.e., lasagna, mac & cheese), fish sticks

HV Menu & Product Review Log

Overview - Reviewing Foods On-hand

Tips for preparing providers & monitors for this requirement:

During visit, talk to provider upon arrival about seeing foods on-hand:

- Explain what is being done & why
- Request provider:
 - For permission to look at foods in storage areas **AND/OR**
 - To pull out all required foods on-hand

During previsits/ orientations:

- Inform provider that monitor will need to see foods on-hand during HVs

Annual Trainings:

- Remind providers that monitors will need to see foods on-hand during HVs

→ **Monitors must check foods on-hand for each item listed in Menu Review column for that HV**

Includes:

- Foods served to children in care stored in refrigerators, freezers, dry food areas
- Even when provider reports same foods are still served as was at prior HVs
 - Cannot just take provider's word! Must see actual foods even if seen before!

HV Menu & Product Review Log

**Clarification
For 2024**

Reviewing Foods / Product Packaging On-hand

Looking at product packaging/
labels kept on-hand

→ **CANNOT REPLACE** looking at actual
foods on-hand

NOTE: The monitor must record foods
that are not on-hand for regularly served
menu items (*even when provider has saved
packaging*) on the *HV Review Form*

Foods removed from
packaging for storage

i.e., cereals, crackers removed from
original packaging to store in sealed
containers

→ **Providers must keep product
packaging on-hand for these
foods until their supply is gone**

HV Menu & Product Review Log

**Reviewing Foods On-hand -
Home-Baked Grains served as WGR**

Providers must have on-hand:

- **Recipe showing at least 50% of grain ingredients are whole grains**
- **Whole grain ingredients used or their packaging on-hand**

Completing the HV Menu & Product Review Log

Example Run Through of Process using Version 1 of Log

Step 1 (left column) - Menu Review

- a. Review entire month of most recent claim & current month up to HV date
- b. List items on menus
 - List each menu item only 1 time throughout the 3 HVs
- c. Mark the # (1,2,3) on the left for each HV the item is on the reviewed menus

Step 2 (right column) - Review Foods On-Hand @ HV

- a. List each food on-hand with their specific brand/name
 - List each specific food (*brand/name*) on-hand only 1 time throughout the 3 HVs
- b. Mark # (HV1,HV2,HV3) for each HV the specific food (*same brand/name*) is on-hand
- c. in far right column if food is creditable
 - If non-creditable food is served on HV day, disallow the meal & cite as finding
- d. Check if foods are on-hand for menu items marked "N" in middle column at prior HV. → Further action is required if still "N"

Refer to [the HV Menu & Product Review Log Instructions](#) for using both Version 1 and Version 2 of log form

Step 3 (middle column) -

Compare Menu Items to Foods On-hand

- a. Record HV date at top of column
- b. Compare menu items in Step 1 column to foods on-hand in Step 2 column with the same HV#
- c. Mark Y if the menu item has foods on-hand at that HV#. Mark N if not.
 - "N" requires follow-up at next HV

20

Completing the HV Menu & Product Review Log

Example Run Through of Process - Version 1 of Log

1st HV: 8/5/2023

**Step
1a**

Step 1 (left column) - Menu Review

a. Review entire month of most recent claim & current month up to HV date

1a. Review menus for entire month of most recent claim & current month up to HV date.



Example Menu

Breakfast	Lunch	Snack
Oatmeal (WG) Fresh blueberries Milk	Grilled cheese On WG bread Tomatoes Oranges Milk	Vanilla yogurt Mixed berries
Cold cereal Grapes Milk	Fish Bread (WG) Green beans Peaches Milk	Toasted English Muffins (WG) Cottage cheese
WG pancakes Strawberries Milk	Pepperoni / Salami subs Lettuce salad Watermelon Milk	Baby carrots Boiled egg

Completing the HV Menu & Product Review Log

1st HV: 8/5/2023

Step
1b
&
1c

Step 1 (left column) - Menu Review

- b. List items on menus
→ List each menu item only 1 time throughout the 3 HVs
- c. Mark the # (1,2,3) on the left for each HV the item is on the reviewed menus

1b. In the left column (Menu Review), list items on menus (List each menu item only 1 time throughout the 3 HVs)

Example Menu		
Breakfast	Lunch	Snack
Oatmeal (WG) Fresh blueberries Milk	Grilled cheese On WG bread Tomatoes Oranges Milk	Vanilla yogurt Mixed berries
Cold cereal Grapes Milk	Fish Bread (WG) Green beans Peaches Milk	Toasted English Muffins (WG) Cottage cheese
WG pancakes Strawberries Milk	Pepperoni / Salami subs Lettuce salad Watermelon Milk	Baby carrots Boiled egg

Version 1 Only
1c. To the left in the Menu Review column, mark the # (1, 2, 3) on left for each HV item on reviewed menus

X
2
3
X
2
3
X
2
3

Items on Reviewed Menus	
Whole Grain-Ric	
X	Bread
2	
3	
X	English Muffins
2	
3	
X	Pancakes
2	
3	
Breakfast Cereal	
X	Oatmeal
2	
3	
X	Cold cereal
2	
3	
Store-Bought Con	
X	Fish
2	
3	
X	Pepperoni
2	
3	
X	Salami
2	
3	
Yogurt	
X	Yogurt (dairy or/and soy)
2	
3	
Cheese cannot be labeled	
Cheese / Tofu	
X	Cheese
2	
3	

HV Menu & Product Review Log

1st HV: 8/5/2023

→ Reviewing Foods On-hand

2a.

List each specific food (brand/name) on-hand only 1 time throughout the 3 HVs

NOTE: Foods listed in the Foods On-hand column may not align with menu item in left column

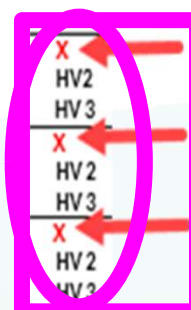
Step 1		Step 3			Step 2			
Items on Reviewed Menu	HV1 Date	HV2 Date	HV3 Date	Foods On-Hand @ HV (May not align with menu item in left column)				
Whole Grain-Rich (WGR) Items								
X 2 3 Bread	Y	N	Y	N	Y	N	X HV2 HV3 Sara Lee bread WW	X
X 2 3 English Muffins	Y	N	Y	N	Y	N	X HV2 HV3 Thomas English Muffins-WW	
X 2 3 Pancakes	Y	N	Y	N	Y	N	X HV2 HV3 Krusteaz Pancake Mix	
Breakfast Cereals Sugar Limit=≤ grams/dry oz.								
X 2 3 Oatmeal	Y	N	Y	N	Y	N	X HV2 HV3 Quaker Oats plain	X X
X 2 3 Cold cereal	Y	N	Y	N	Y	N	X HV2 HV3 Kix Berry	X X
	Y	N	Y	N	Y	N	X HV2 HV3 Honey Nut Cheerios	
Items on Reviewed Menus		HV1 Date	HV2 Date	HV3 Date	Foods On-Hand @ HV (May not align with menu item in left column)			
Store-Bought Combo Foods (Chix nuggets/sausage)/Processed Meats (meatballs)								
X 2 3 Fish	Y	N	Y	N	Y	N	X HV2 HV3 Fish sticks - Gorton	
Yogurt Sugar Limit=≤23 grams/6 oz.								
X 2 3 Yogurt (dairy or/and soy)	Y	N	Y	N	Y	N	X HV1 HV2 HV3 Upstate Farms NF Strawberry	X
Cheese cannot be labeled as product; sauce must have CN. Tofu must have 5 gr. protein/ 2.2 oz.								
Cheese / Tofu Only List Non-creditable cheese/tofu								
X 2 3 Cheese	Y	N	Y	N	Y	N	X HV1 HV2 Kraft Singles (cheese product)	

HV Menu & Product Review Log

→ Reviewing Foods On-hand

1st HV: 8/5/2023

Version 1 Only
2b. Mark home visit #
(HV1, HV2, HV3 - Version 1 of log only) for each HV the specific food (same brand/ name) is on-hand



Step 1		Step 3			Step 2		
Items on Reviewed Menu	HV1 Date	HV2 Date	HV3 Date	Foods On-Hand @ HV			
	8/5/23			(May not align with menu item in left column)			
Whole Grain-Rich (WGR) Items							WGR <input checked="" type="checkbox"/>
X 2 3	Bread	Y N	Y N	Y N	X HV2 HV3	Sara Lee bread WW	X
X 2 3	English Muffins	Y N	Y N	Y N	X HV2 HV3	Thomas English Muffins-WW	
X 2 3	Pancakes	Y N	Y N	Y N	X HV2 HV3	Krusteaz Pancake Mix	
Breakfast Cereals Sugar Limit=≤6g/s/dry oz.							≤ Sugar Limit <input checked="" type="checkbox"/>
X 2 3	Oatmeal	Y N	Y N	Y N	X HV2 HV3	Quaker Oats plain	X X
X 2 3	Cold cereal	Y N	Y N	Y N	X HV2 HV3	Kix Berry	X X
X 2 3		Y N	Y N	Y N	X HV2 HV3	Honey Nut Cheerios	
Items on Reviewed Menus	HV1 Date	HV2 Date	HV3 Date	Foods On-Hand @ HV			
	8/5/23			(May not align with menu item in left column)			
Store-Bought Combo Foods (Chix nug, lasagna)/Processed Meats (meatballs)							CN Label /PFS <input checked="" type="checkbox"/>
X 2 3	Fish	Y N	Y N	Y N	X HV2 HV3	Fish sticks - Gorton	
X 2 3	Pepperoni	Y N	Y N	Y N	X HV2 HV3		
X 2 3	Salami	Y N	Y N	Y N	X HV2 HV3		
Cheese cannot be labeled as product; sauce must have CN. Tofu must have 5 gr. protein/ 2.2 oz.							
Cheese / Tofu				Only List Non-creditable cheese/tofu			
X 2 3	Cheese	Y N	Y N	Y N	X HV1 HV2 HV3	Kraft Singles (cheese product)	

Completing the HV Menu & Product Review Log

→ Reviewing Foods On-hand

1st HV: 8/5/2023

- WGR Foods
- Cereals

Use [CACFP Reference Guide](#)

2c. Check the box to the right if the food on-hand meets its crediting criteria
The box is yellow highlighted for foods not meeting criteria

Step 2		
Foods On-Hand @ HV (May not align with menu item in left column)		
		WGR <input checked="" type="checkbox"/>
X HV2 HV3	Sara Lee bread WW	X
X HV2 HV3	Thomas English Muffins-WW	
X HV2 HV3	Krusteaz Pancake Mix	
grams/dry oz.	≤ Sugar Limit <input checked="" type="checkbox"/>	WGR <input checked="" type="checkbox"/>
X HV3	Quaker Oats plain	X
X HV3	Kix Berry	X
X HV2 HV3	Honey Nut Cheerios	



Use [CACFP Reference Guide](#)
The Rule-of-3

Ingredient Statement: WHOLE WHEAT FLOUR, WATER, FARINA, WHEAT GLUTEN, YEAST, SUGAR, SALT, PRESERVATIVES (CALCIUM PROPIONATE, SORBIC ACID), GRAIN VINEGAR, NATURAL FLAVOR, SODIUM STEAROYL LACTATE

Non-Creditable Grains & Flours
cannot be one of the first three grain ingredients

Black bean, legume, nut, seed flour	Cornmeal	Oat fiber
Barley malt	Cultured wheat flour	Pearl(milled) rice
Enriched flour	Durum flour	Potato starch
Whole grain flour	Degerminated corn meal	Rice flour
Whole grain flour	Farina	Semolina
Whole grain flour	Malted barley flour	Soy flour

WI WIC Approved Cereals

- Quaker (in packets only) Instant Grits Original (Original and All Flavors)
- Instant Oatmeal Original (Plain)*
- Kix (Berry Berry*, Honey*, Plain)

Cereal
No more than 6 grams of sugar per dry ounce (dry ounce = 28.35 grams). Cereals must be whole grain, enriched, or fortified.

Enriched bleached flour (wheat flour, malted wheat flour, niacin, iron, thiamin mononitrate, riboflavin, folic acid), soybean oil, stabilized rice bran with germ), degerminated soybean oil, Less than 2% of: baking soda, calcium carbonate, monocalcium phosphate, natural phosphate, spices.

The Rule of 3

Completing the HV Menu & Product Review Log
→ Reviewing Foods On-hand

- Store-bought combo Foods
- Cheese
- Yogurt

1st HV: 8/5/2023

Step 2

DPI Resource:
[Crediting Store-Bought Combo Foods & Processed MMA](#)


Foods On-Hand @ HV (May not align with menu item in left column)	CN Label	PFS <input checked="" type="checkbox"/>
asagna)/Processed Meats (meatballs)		<input checked="" type="checkbox"/>
X HV 2 HV 3 <i>Fish sticks - Gorton</i>		
Sugar Limit = ≤23 grams/6 oz.	≤ Sugar Limit	<input checked="" type="checkbox"/>
X HV 2 HV 3 <i>Upstate Farms NF Strawberry</i>		X
HV 1 HV 2 HV 3		
st have CN. Tofu must have 5 gr. protein/ 2.2 oz.		
Only List Non-creditable cheese/tofu		
X X HV 3 <i>Kraft Singles (cheese product)</i>		

DPI Resource:
[Creditable & Non-Creditable Cheeses](#)

Update - yogurts:
List all yogurts on-hand & whether they are creditable

Use [CACFP Reference Guide](#)


2c. Check the box to the right if the food on-hand meets its crediting criteria
(except for cheese - only list non-creditable cheeses on-hand)
The box is yellow highlighted for foods not meeting criteria



Cheese Product


Update - yogurts:
List all yogurts on-hand & whether they are creditable

Gortons Fish Sticks



No CN/PFS

Upstate Farms NF Strawberry Yogurt



About 1 serving per container
Serving size 1 container (113g)

14 grams sugar
113 grams serv.

Total Fat	0g	0%
Saturated Fat	0g	0%
Trans Fat	0g	
Cholesterol	<5mg	1%
Sodium	50mg	2%
Total Carbohydrate	19g	7%
Dietary Fiber	0g	0%
Total Sugars	14g	
Includes 10g Added Sugars		20%

Yogurt

No more than 23 grams of sugar per 6 ounces.

113 g	4 oz	15 g
-------	------	------

Step 3 (middle column) - Compare Menu Items to Foods On-hand

Step 3a
Record Home Visit date at the top of column for Step 3

Step 3b - Compare

- Each menu item listed in Step 1 column (left column) TO
- Each food on-hand listed in Step 2 column marked with same HV#

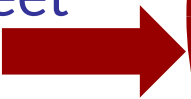
Step 3c -

- Mark "Y" if menu item has foods on-hand at that HV#
- Mark "N" if menu item does not have foods on-hand at that HV#

Step 1	Step 3			Step 2		
Items on Reviewed Menu	HV 1 Date	HV 2 Date	HV 3 Date	Foods On-Hand @ HV (May not align with menu item in left column)		
Whole Grain-Rich (WGR) Items						
<input checked="" type="checkbox"/> 1 Bread	Y	N	N	Y	N	<input checked="" type="checkbox"/> Sara Lee bread WW
<input checked="" type="checkbox"/> 2 English Muffins	Y	N	N	Y	N	<input checked="" type="checkbox"/> Thomas English Muffins-WW
<input checked="" type="checkbox"/> 3 Pancakes	Y	N	N	Y	N	<input checked="" type="checkbox"/> Krusteaz Pancake Mix
Breakfast Cereals Sugar Limit=≤6 grams/dry oz. ≤ Sugar Limit <input checked="" type="checkbox"/> WGR <input checked="" type="checkbox"/>						
<input checked="" type="checkbox"/> 1 Oatmeal	Y	N	N	Y	N	<input checked="" type="checkbox"/> Quaker Oats plain
<input checked="" type="checkbox"/> 2 Cold cereal	Y	N	N	Y	N	<input checked="" type="checkbox"/> Kix Berry
						<input checked="" type="checkbox"/> Honey Nut Cheerios
Items on Reviewed Menu						
Store-Bought Combo Foods (Chix nug, lasagna)/Processed Meats (meatballs) PFS <input checked="" type="checkbox"/>						
<input checked="" type="checkbox"/> 1 Fish	Y	N	N	Y	N	<input checked="" type="checkbox"/> Fish sticks - Gorton
<input checked="" type="checkbox"/> 2 Pepperoni	Y	N	N	Y	N	
Yogurt						
<input checked="" type="checkbox"/> 1 Yogurt (dairy or/and soy)	Y	N	N	Y	N	<input checked="" type="checkbox"/> Upstate Farms NF Strawberry
Cheese cannot be labeled as product; sauce must have CN. Tofu must have 5 gr. protein/ 2.2 oz.						
Cheese / Tofu Only List Non-creditable cheese/tofu						
<input checked="" type="checkbox"/> 1 Cheese	Y	N	N	Y	N	<input checked="" type="checkbox"/> Kraft Singles (cheese product)

HV Menu & Product Review Log

Record on the log:

1. Foods served on menus
 2. Foods on-hand
 3. Whether foods meet crediting criteria
 4. Whether each food on menu has food(s) on-hand
- 

Transfer from log to HV Review Form:

1. Foods not meeting crediting criteria as findings
2. Disallowances
3. Menu items with no foods on-hand (for follow-up either before or at next HV)

Required Home Visit Findings, Disallowances, and Follow-up Chart

→ Identify from the HV Menu & Product Review Log

CACFP Required Home Visit Findings, Disallowances, and Follow-up		Attachment to GMD: FDCH Monitoring Requirements	
This chart is intended for monitors to use during HVs			
Requirements	Findings	Disallowances	Follow-up
CACFP Meal Pattern			
<ul style="list-style-type: none"> Review of Foods On-hand For foods that require review of packaging (for crediting) based on the menu review recorded on HV Review Log "Reviewing foods on-hand" means looking at crediting information on packaging of actual foods in provider's storage areas during HVs (pantries, refrigerator, freezer) Looking at saved packaging alone CANNOT REPLACE looking at actual foods in storage during the HV. 	<ul style="list-style-type: none"> Foods on-hand (served to children in care) for the following items do not meet crediting criteria: <ul style="list-style-type: none"> Cereals exceed the sugar limit Grains identified as WGR on menus do not meet WGR criteria At least 1 WGR item was not served each day due to grains identified as WGR on menus do not meet the requirement Yogurt exceeds sugar limit Processed meats with no CN label / PFS (if required) Store-bought combination foods with no CN label/PFS Tofu does not meet the required protein level Non-creditable cheese (labeled as "cheese product", imitation cheese, cheese sauce without CN label/PFS) 	<p>1st occurrence for serving a specific non-creditable food item: Only disallow meals serving the non-creditable food item on the HV day.</p> <p>UPDATE Repeat occurrences: Disallow meals that can be identified as serving the non-creditable food item back to the 1st of the current month.</p>	<p>UPDATE Items on reviewed menus not on-hand for consecutive HVs count as recurrences (or if intermittent among HVs per sponsor discretion) Recurrences are specific to menu item. If provider has food on-hand at next visit and/or submits a photo of packaging, sponsor may "reset" occurrences back to zero for that menu item.</p> <ul style="list-style-type: none"> 1st Occurrence: Do not disallow meals; follow up at next HV to check for foods on-hand for those items if provider is still serving them. 2nd Occurrence: Not required to disallow meals; require provider to submit packaging (or photo) from next purchase of food not on-hand. 3rd Occurrence: Monitor should disallow meals serving items without foods or packaging saved from latest purchase on-hand back to 1st of current month.

NEW Resource!
[Required Home Visit Findings, Disallowances, & Follow-Up Chart](#)

→ Identify findings from completed HV Log Non-creditable foods recorded on HV Review Log

Findings

1st HV: 8/5/2023

Requirements	Findings
CACFP Meal Pattern	
<ul style="list-style-type: none"> Review of Foods On-hand (Foods that require review of product packaging/doc (on completed HV Review Log)) 	<ul style="list-style-type: none"> Foods on-hand (served to children in care) for the following items do not meet crediting criteria: <ul style="list-style-type: none"> Cereals exceed the sugar limit Grains identified as WGR on menus do not meet WGR criteria At least 1 WGR item was not served each day due to grains identified as WGR on menus do not meet the requirement Yogurt exceeds sugar limit Processed meats with no CN label / PFS (if required) Store-bought combination foods with no CN label/PFS Tofu does not meet the required protein level Non-creditable cheese (labeled as "cheese product", imitation cheese, cheese sauce without CN label/PFS)

Step 2		
Foods On-Hand @ HV (May not align with menu item in left column)		
grams/dry oz.	≤ Sugar Limit <input checked="" type="checkbox"/>	WGR <input checked="" type="checkbox"/>
X HV 3 Quaker Oats plain	X	X
X HV 3 Kix Berry	X	X
X HV 2 HV 3 Honey Nut Cheerios		
		WGR <input checked="" type="checkbox"/>
X HV 2 HV 3 Sara Lee bread WW		X
X HV 2 HV 3 Thomas English Muffins-WW		
X HV 2 HV 3 Krusteaz Pancake Mix		
lasagna)/Processed Meats (meatballs)		CN Label /PFS <input checked="" type="checkbox"/>
X HV 2 HV 3 Fish sticks - Gorton		
Only List Non-creditable cheese/tofu		
X HV 3 Kraft Singles (cheese product)		

Required Home Visit Findings, Disallowances, & Follow-Up Chart

→ Required Disallowances – Non-creditable foods recorded on HV Review Log

1st HV: 8/5/2023

Disallowances

1st occurrence for serving a specific non-creditable food item:
Only disallow meals serving the non-creditable food item on the HV day.

Honey Nut
Cheerios served
on HV day
(1st HV cited)
→ Disallow
breakfast

Findings

- Foods on-hand (served to children in care) for the following items do not meet crediting criteria:
 - Cereals exceed the sugar limit

Foods On-Hand @ HV (May not align with menu item in left column)			
grams/dry oz.	≤ Sugar Limit <input checked="" type="checkbox"/>	WGR <input checked="" type="checkbox"/>	
X HV 3 Quaker Oats plain	X	X	
X HV 3 Kix Berry	X	X	
X HV 2 HV 3 Honey Nut Cheerios	X	X	

31

→ Required Follow-up – Menu items with no foods on-hand identified on HV Review Log

Required Follow-up

UPDATE

Items on reviewed menus not on-hand for consecutive HVs count as recurrences (or if intermittent among HVs per sponsor discretion)

Recurrences are specific to menu item. If provider has food on-hand at next visit and/or submits a photo of packaging, sponsor may "reset" occurrences back to zero for that menu item.

▪ **1st Occurrence:**

Do not disallow meals; follow up at next HV to check for foods on-hand for those items if provider is still serving them.

1st HV: 8/5/2023

Pepperoni & salami were on reviewed menu, but had no foods on-hand

→ Follow-up at next HV

Step 1		Step 3			Step 2			
Items on Reviewed Menu		HV 1 Date	HV 2 Date	HV 3 Date	Foods On-Hand @ HV			
		8/5/23			(May not align with menu item in left column)			
Whole Grain-Rich (WGR) Items							WGR	
X	Bread	Y	N	Y	N	X Sava Lee bread WW	X	
X	English Muffins	Y	N	Y	N	X Thomas English Muffins WW		
X	Pancakes	Y	N	Y	N	X Krusteaz Pancake Mix		
Breakfast Cereals						Sugar Limit = <6 grams/dry oz.	< Sugar Limit	WGR
X	Oatmeal	Y	N	Y	N	X Quaker Oats plain	X	
X	Cold cereal	Y	N	Y	N	X Kix Berry	X	
		Y	N	Y	N	X Honey Nut Cheerios		
Items on Reviewed Menus		HV 1 Date	HV 2 Date	HV 3 Date	Foods On-Hand @ HV		CN Label /PFS	
		8/5/23			(May not align with menu item in left column)			
Store-Bought Combo Foods (Chix nug, lasagna)/Processed Meats (meatballs)							CN Label /PFS	
X	Fish	Y	N	Y	N	X Fish sticks - Gorton		
X	Pepperoni	Y	N	Y	N			
X	Salami	Y	N	Y	N			

Required Home Visit Findings, Disallowances, & Follow-Up Chart ³²

Home Visit Review Form

Home Visit Summary Page

8/5/2023

Transfer from log to HV Review Form:

(1) Foods not meeting crediting criteria as findings (2) Disallowances (3) Menu items with no foods on-hand (for follow-up either before or at next HV)

Findings:

Following foods are not creditable:

- Kraft Singles (cheese product)
- Gorton's Breaded fish sticks (CN label/PFS)
- Honey Nut Cheerios (exceed sugar limit)
→ Served this cereal for breakfast today - disallowed meal (8/5/23 breakfast)

Following grains are not whole grain-rich:

- Thomas English Muffins
- Krusteaz Pancake Mix

TA & Resources:

Reviewed credible cheeses, foods requiring CN labels/PFS, cereals meeting sugar limits, & using the Rule-of-3 for WGR.

Corrective Action:

- Discontinue serving non-creditable foods immediately.
- Use resources discussed for identifying creditable foods & grains that are WGR.
- Discontinue identifying English muffins & pancakes as WGR on your menus if serving these specific brands/kinds. They can be served as enriched grain items.

Required Follow-up:

Menus show you are serving pepperoni & salami as M/MA, but neither foods or manufacturer's PFS are on-hand today. They require a CN label/PFS to count. If you continue serving these foods, hold onto packaging with CN label (or manufacturer's PFS) from your next purchase for my review at next HV or send me a photo to verify whether they are creditable.

Provider's Signature:

Violet Day

Monitor's Signature:

Lila Sunshine

Completing the HV Menu & Product Review Log

2nd HV: 9/30/2023

3

Step 2

Follow the same process, but...

Step 1: Complete Menu Review column

- Add new items that were not on menus reviewed at prior HV
- Mark "2" for items on menus for this HV (for both new items & those already listed from prior HV)

Step 2: Complete Foods On-Hand @ HV column

- Add new foods on-hand that were not on-hand during prior HV
- Mark "HV2" for foods on-hand at this visit (both new foods on-hand at this HV & those on-hand during prior HV).
- Check the box to the right if new foods on-hand are creditable
 - Except for cheese – only list non-creditable cheeses

Items on Reviewed Menus	HV 1 Date 8/5/23	HV 2 Date 9/30/23	HV 3 Date	Foods On-Hand @ HV (May not align with menu item in left column)			WGI	
Whole Grain-Rich (WGR) Items							<input checked="" type="checkbox"/>	
X X 3 Bread	Y	N	Y	N	Y	N	X HV 3 Sara Lee bread WW	X
X 2 3 English Muffins	Y	N	Y	N	Y	N	X HV 2 HV 3 Thomas English Muffins-WW	X
X 2 3 Pancakes	Y	N	Y	N	Y	N	X HV 2 HV 3 Krusteaz Pancake Mix	X
X 1 2 3 Brown rice	Y	N	Y	N	Y	N	X HV 1 HV 2 Uncle Ben's brown rice	X
X 1 2 3 WW Pasta	Y	N	Y	N	Y	N	X HV 2 HV 3 Barilla WW Rotini	X
Breakfast Cereals							<input checked="" type="checkbox"/>	
X X 3 Oatmeal	Y	N	Y	N	Y	N	X HV 3 Quaker Oats plain	X
X X 3 Cereal	Y	N	Y	N	Y	N	X HV 3 Kix Berry	X
X 2 3	Y	N	Y	N	Y	N	X HV 2 HV 3 Honey Nut Cheerios	X
Store-Bought Combo Foods (Chix nug, k							<input checked="" type="checkbox"/>	
X 2 3 Fish	Y	N	Y	N	Y	N		
X X 3 Pepperoni	Y	N	Y	N	Y	N		
X X 3 Salami	Y	N	Y	N	Y	N		
Cheese / Tofu							<input checked="" type="checkbox"/>	
X X 3 Cheese	Y	N	Y	N	Y	N	X HV 3 Kraft Singles (cheese product)	X

Completing the HV Menu & Product Review Log
2nd HV: 9/30/2023

Step 3 (Middle Column) for 2nd HV:

- Record Home Visit Date at top of middle column
- Compare each menu item listed in Step 1 column to each food on-hand listed in Step 2 column marked with the same HV#
 - Circle "Y" if the menu item marked with "2" has foods on-hand during HV#2
 - Circle "N" if the menu item marked with "2" does not have foods on-hand during HV#2
- **Take note of items served on menus that did not have foods on-hand during prior HV(s) & again for this HV.**

Step 1		Step 3			Step 2					
Items on Reviewed Menus		HV 1 Date	HV 2 Date	HV 3 Date	Foods On-Hand @ HV					
		8/5/23	9/30/23		(May not align with menu item in left column)					
Whole Grain-Rich (WGR) Items								WGI <input checked="" type="checkbox"/>		
X 2 3	Bread	Y	N	Y	N	Y	N	X HV 3 Sara Lee bread WW	X	
X 2 3	English Muffins	Y	N	Y	N	Y	N	X HV 2 HV 3 Thomas English Muffins-WW		
X 2 3	Pancakes	Y	N	Y	N	Y	N	X HV 2 HV 3 Krusteaz Pancake Mix		
X 2 3	Brown rice	Y	N	Y	N	Y	N	X HV 1 HV 2 HV 3 Uncle Ben's brown rice	X	
X 2 3	WW Pasta	Y	N	Y	N	Y	N	X HV 1 HV 2 HV 3 Barilla WW Rotini	X	
Breakfast Cereals								Sugar Limit=≤6 grams/dry oz.	≤ Sugar Limit <input checked="" type="checkbox"/>	WGI <input checked="" type="checkbox"/>
X 2 3	Oatmeal	Y	N	Y	N	Y	N	X HV 3 Quaker Oats plain	X	
X 2 3	Cold cereal	Y	N	Y	N	Y	N	X HV 3 Kix Berry	X	
X 2 3		Y	N	Y	N	Y	N	X HV 2 HV 3 Honey Nut Cheerios		
Store-Bought Combo Foods								Chix nug, k		
X 2 3	Fish	Y	N	Y	N	Y	N			
X 2 3	Pepperoni	Y	N	Y	N	Y	N			
X 2 3	Salami	Y	N	Y	N	Y	N			
Cheese / Tofu								Only List Non-creditable cheese/tofu		
X 2 3	Cheese	Y	N	Y	N	Y	N	X HV 3 Kraft Singles (cheese product)		

→ Identify findings from completed HV Log Non-creditable foods recorded on HV Review Log

Findings

2nd HV: 9/30/2023

Requirements	Findings
CACFP Meal Pattern	
<ul style="list-style-type: none"> Review of Foods On-hand (Foods that require review of product packaging/doc (on completed HV Review Log)) 	<ul style="list-style-type: none"> Foods on-hand (<i>served to children in care</i>) for the following items do not meet crediting criteria: <ul style="list-style-type: none"> Cereals exceed the sugar limit Grains identified as WGR on menus do not meet WGR criteria At least 1 WGR item was not served each day due to grains identified as WGR on menus do not meet the requirement Yogurt exceeds sugar limit Processed meats with no CN label / PFS (<i>if required</i>) Store-bought combination foods with no CN label/PFS Tofu does not meet the required protein level Non-creditable cheese (labeled as "cheese product", imitation cheese, cheese sauce without CN label/PFS)

Cheese cannot be labeled as product; sauce must have CN. Tofu must have 5 gr. protein/ 2.2 oz.						
Cheese / Tofu					Only List Non-creditable cheese/tofu	
X		Y	N	Y	N	X
X	Cheese					X
3						HV3
<i>Kraft Singles (cheese product)</i>						

[Required Home Visit Findings, Disallowances, & Follow-Up Chart](#)

→ Required Disallowances – Non-creditable foods recorded on HV Review Log

2nd HV: 9/30/2023

Disallowances

UPDATE

Repeat occurrences:

Disallow meals that can be identified as serving the non-creditable food item back to the 1st day of the current month.

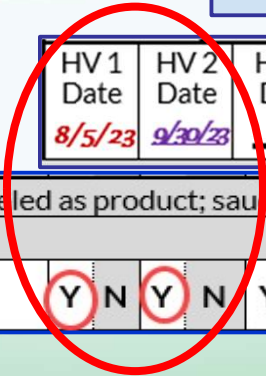
→ Provider cited for serving Kraft Cheese Singles at the 8/5/23 HV & still serving it for cheese at the 9/30/23 HV

Repeat Occurrence

→ Disallow all meals serving cheese as the MMA back to 9/1/23

HV 1 Date	HV 2 Date	HV 3 Date
8/5/23	9/30/23	

Cheese cannot be labeled as product; sauce must have CN. Tofu must have 5 gr. protein/ 2.2 oz.									
Cheese / Tofu						Only List Non-creditable cheese/tofu			
X X 3	Cheese	Y	N	Y	N	Y	N	X X HV3	<i>Kraft Singles (cheese product)</i>



→ Required Follow-up – **2nd HV: 9/30/2023**
Menu items with no foods on-hand identified on HV Review Log

Completing Step 3 (Middle Column) for 2nd HV:
If items served on reviewed menus did not have foods on-hand (or packaging from recent purchase or manufacturer's PFS) during the previous HV and now again for this HV, require provider to submit photo of packaging when they purchase the foods next time.

UPDATE
Items on reviewed menus not on-hand for consecutive HVs count as recurrences (or if intermittent among HVs per sponsor discretion)
Recurrences are specific to menu item. If provider has food on-hand at next visit and/or submits a photo of packaging, sponsor may "reset" occurrences back to zero for that menu item.

- **1st Occurrence:**
Do not disallow meals; follow up at next HV to check for foods on-hand for those items if provider is still serving them.
- **2nd Occurrence:**
Not required to disallow meals; require provider to submit packaging (or photo) from next purchase of food not on-hand.

Required Follow-up

Pepperoni & salami were on reviewed menus for 2nd HV, but still had no foods on-hand

Step 1		Step 3			
Items on Reviewed Menus		HV 1 Date	HV 2 Date	HV 3 Date	
Store-Bought Combo Foods		8/5/23	9/30/23	---	
X 2	fish	Y	N	Y	N
X 3	Pepperoni	Y	N	Y	N
X	Salami	Y	N	Y	N

Home Visit Review Form

Home Visit Summary Page

9/30/2023

Transfer from log to HV Review Form:

- (1) Foods not meeting crediting criteria as findings (and repeats)
- (2) Disallowances
- (3) Menu items with no foods on-hand (for follow-up either before or at next HV)

Findings:

Following foods are not creditable:

- Kraft Singles (cheese product)
(Repeat -2nd occurrence)*

TA & Resources:

Reviewed credible cheeses again

Disallowances:

All lunches served to 1+ year olds which served grilled cheese during September 2023: Lunches served on: 9/8/23, 9/18/23, 9/28/23

Corrective Action:

- Discontinue serving non-creditable cheese immediately.*

Required Follow-up:

Menus show you are still serving pepperoni & salami as M/MA, but neither foods or manufacturer's PFS are on-hand today. They require a CN label/PFS to count.

- If you purchase these foods again, submit photo of packaging upon purchasing them next time.*

Provider's Signature / Date

Violet Day 9/30/2023

Monitor's Signature / Date

Lila Sunshine 9/30/23

Questions Completing the HV Menu & Product Review Log

Question: What does it mean to review “foods on-hand”?

Answer: Reviewing “foods on-hand” means looking at crediting information on packaging of actual foods in provider’s storage areas during HVs (pantries, refrigerator, freezer)

➔ Looking at saved packaging alone CANNOT REPLACE looking at actual foods they have in their storage during the home visit.

NOTE: The monitor must note foods that are not on-hand for regularly served menu items (*even when provider has saved packaging*) on the HV Review Form

Question: Why document the brand/type of each food?

Writing out everything gets cumbersome. Providers are serving different foods at each HV & it is time consuming to list everything out. We would prefer to just list the brands/types not creditable and not list foods that we have verified to be creditable.

Answer: The log is a landing place for sponsors to document what specific foods they verified as creditable or not creditable and track what the provider is serving for items on their menus. Subsequently, it serves as documentation for DPI to verify sponsors are monitoring a good size sample of foods providers are actually serving and that they are correctly determining whether foods meet their crediting criteria.

Questions-Completing the HV Menu & Product Review Log

Question: What if providers served a menu item but doesn't have any foods of that item on-hand during the HV and they state they are not serving it anymore?

Answer: If the provider states they no longer serve the menu item, document this on the log. If the provider doesn't serve the item on the menus reviewed for the next HV, no further action is needed at that point.

Question: What counts as a re-occurrence (*recurrence*) of foods not being on-hand for items on the reviewed menus?

Answer: Items on reviewed menus that are **not on-hand for consecutive HVs count as recurrences** (or if intermittent among HVs per sponsor discretion)
Recurrences are specific to menu item. If provider has food on-hand at next visit and/or submits a photo of packaging, sponsor may "reset" occurrences back to zero for that menu item.

Question: Is it a "red flag" when the provider has the exact same brand/type of foods on-hand at every HV?
This specific sponsor checks expiration dates if suspicious of the provider just saving foods in storage for the monitors to see during HVs but not actually serving them.

Answer: The other sponsors agreed, that no, they do not consider it a "red flag" as long as the food meets its crediting criteria. *That being said, DPI recognizes & commends the due diligence of being aware of such integrity concerns and encourages sponsors to take further steps (such as checking expiration dates of foods), when suspecting these situations.*

The HV Infant Review Log - Updates

Updated the question about developmentally appropriate foods:

From:

Provider serves developmentally appropriate foods	Y/N:
Provider claims meals w/ ≤ 1 Family-supplied component	Y/N:

“Provider **serves** developmentally appropriate foods”

TO:

“**Claims meals that serve** developmentally appropriate foods”

Name:	Age: _____ Months	HV Date:		
Birthdate:	Menu Review	Complete during HV		
	On Menus <input checked="" type="checkbox"/>	Family Sup. <input checked="" type="checkbox"/>	Provider Sup. <input checked="" type="checkbox"/>	Creditable (Y/N)
Meal Components				
Breast Milk				
Infant Formula				
Iron-Fort. Infant Cereal				
Fruits/Vegetables				
Meats/Meat Alternates				
Grains				
	*Claims meals w/ 1 or less Family-supplied item			Y/N:
	*Claims meals that serve developmentally appropriate foods			Y/N:
	**Infant menus contain same components as on-hand			Y/N:
Notes				

To clarify:

Once an infant is developmentally ready for foods, provider must serve these foods as part of the meal to claim it.

- Once regularly eating foods, if families choose to serve foods at home as part of their meal prior to or after child care, the provider is not serving the full meal while in care because the families served part of it at home. **In this case, the provider must not claim the meal.**

The HV Infant Review Log - Updates

Changed to a 3rd question from a footer note to answer when comparing items on infant menus to foods on-hand & being served to each infant:

From:

● CA is required when foods are on-hand for infant, but are not recorded on infant's menus

TO:

Name:	Age: _____ Months	HV Date:		
Birthdate:	Menu Review	Complete during HV		
	On Menus <input checked="" type="checkbox"/>	Family Sup. <input checked="" type="checkbox"/>	Provider Sup. <input checked="" type="checkbox"/>	Creditable (Y/N)
Meal Components				
Breast Milk				
Infant Formula				
Iron-Fort. Infant Cereal				
Fruits/Vegetables				
Meats/Meat Alternates				
		*Claims meals w/ 1 or less Family-supplied item		Y/N:
		*Claims meals that serve developmentally appropriate foods		Y/N:
		**Infant menus contain same components as on-hand		Y/N:
Notes				

The HV Infant Review Log - Updates

Updated Footer Notes:

Added asterisks to questions and an explanation of required actions for No answers.

****** "N" answers require meal disallowances and corrective action (CA)

* Claims meals w/ 1 or less Family-supplied item	Y/N:
* Claims meals that serve developmentally appropriate foods	Y/N:
** Infant menus contain same components as on-hand	Y/N:
Notes	

****** "N" answers require CA; more than 1 occurrence requires CA and disallowances

Completing the HV Infant Review Log

Complete a chart for **each enrolled infant** at each HV

Step 1: Menu Review:

- Review entire month of the most recent claim and current month up to the HV date
- List all items served to each infant on their menus

Step 2: Review of Formula/Breast Milk/Foods On-hand for each Infant

- Look at all foods, formula/breast milk for each enrolled infant
- Mark each component as provider and/or family-supplied

Name:	Age: _____ Months	HV Date:		
	Menu Review	Complete during HV		
Birthdate:	On Menus <input checked="" type="checkbox"/>	Family Sup. <input checked="" type="checkbox"/>	Provider Sup. <input checked="" type="checkbox"/>	Creditable (Y/N)
Meal Components				
Breast Milk				
Infant Formula				
Iron-Fort. Infant Cereal				
Fruits/Vegetables				
Meats/Meat Alternates				
Grains				
*Claims meals w/ 1 or less Family-supplied item				Y/N:
*Claims meals that serve developmentally appropriate foods				Y/N:
**Infant menus contain same components as on-hand				Y/N:
Notes				

Refer to the [Instructions for Completing the HV Menu-Product Review Logs & Infant Review Log](#)

Completing the HV Infant Review Log

Step 3: Determine whether each food and formula is creditable

- Look at each infant's type of formula (if applicable) & foods on-hand
- Check box for each component if creditable

Use resources posted under [GML - Infant Requirements](#)

- If formula is on FDA exempt list, infant needs valid medical statement: [FDA Exempt Formulas List](#)
- [Crediting Infant Foods](#)
- [USDA Feeding Infants Guide](#)

Step 4: Complete questions at the bottom of chart:

Is the provider?

- Only claiming infant meals with 1 or less family-supplied item?
- Only claiming meals that serve developmentally appropriate foods?
- Recording all foods/formula/breast milk on the menus that are actually being served to each infant?

Name:	Age: _____ Months	HV Date:		
	Birthdate:	Menu Review	Complete during HV	
Meal Components	On Menus	Family Sup.	Provider Sup.	Creditable (Y/N)
Breast Milk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Infant Formula				
Iron-Fort. Infant Cereal				
Fruits/Vegetables				
Meats/Meat Alternates				
Grains				
*Claims meals w/ 1 or less Family-supplied item				Y/N:
*Claims meals that serve developmentally appropriate foods				Y/N:
**Infant menus contain same components as on-hand				Y/N:
Notes				

HV Infant Review Log

Required Home Visit Findings, Disallowances, & Follow-Up Chart

This chart is intended for monitors to use during HVs

Requirements	Findings	Required Disallowances	Required Follow-up
<ul style="list-style-type: none"> Infants (from completed HV Infant Review Log) 	<ul style="list-style-type: none"> Based on infant foods and formula on-hand for each infant: <ul style="list-style-type: none"> Is not serving creditable formula and/or infant foods to infant; Claims meals not serving developmentally appropriate foods; Claims meals serving more than one family-supplied component; and/or Submitted infant menus do not reflect foods on-hand/being served to each infant. 	<p>1st occurrence based on review of formula and infant foods on-hand, only disallow meals served on the HV day:</p> <ul style="list-style-type: none"> More than one family-supplied meal component Non-creditable items Not containing all required components according to the infant's developmental readiness (including when family serves part of the meals at home) <p>Repeat occurrences: Disallow meals that can be identified with the findings listed above for 1st occurrence, back to the 1st day of the current month.</p>	<p>UPDATE</p> <ul style="list-style-type: none"> 1st occurrence: Do not disallow meals when submitted infant menus do not reflect foods on-hand/being served to each infant. Repeat occurrences: Disallow infant meals submitted on the infant menus back to the 1st day of the current month when they do not reflect foods on-hand/being served to each infant.

Transfer from log to HV Review Form:

- Any findings listed in this chart
- Disallowances
- Follow-up when infant menus do not reflect foods on-hand/being served to infant

**NOTE
UPDATES**

Home Visit Review Form Documentation

HV review form documentation must include:

1. Date of home visit
2. Start and end time
3. Type of review
 - Announced/unannounced; and
 - If/what type of meal observation
1. Assessment of whether findings from prior home visits are corrected
2. Assessment of compliance with requirements in *Required Review Elements* section; and
- Signature of provider & monitor

6. Required Documentation of HV Results

Must include, at minimum, a-d:

- a. Detail of findings & any resulting meal disallowances;
- b. Required CA & when it must be completed;
- c. Any TA provided;
- d. Any required follow-up (*i.e., submission of missing SDN documents, enrollment forms, etc.*)

Previsit Documentation

Documentation of Follow-Up

- **Note any required corrections and/or further records needed**
Example - if they need to enroll infants (*not exclude them from the Program*), submit required special dietary needs documents for a child, etc.
- **At first HV or prior to, check whether corrections were made and/or follow-up documents were submitted and note on *HV Review Form***

During Home Visits - Reminders:

- **Check temps - both refrigerator and freezer!**
- **Meal observations**
 - Must see the “majority of the meal”
 - Confirm provider is serving minimum portion sizes (most important to see the beginning of meal)
- **Family style dining vs preplated**
 - Minimum serving size of each component, per the CACFP meal pattern, **must be available for each participant seated at the table**
 - Minimum serving size of each component, per the CACFP meal pattern, **must be placed on plate and in cup**

Questions - Infants & Family-Style Dining

Infants:

Question: Does the CACFP require child care providers to write the date when a can of IFIF is opened?

Answer: This is a licensing requirement. Once opened, the IFIF must be used within 30 days. CACFP defaults to licensing (DCF) for health and safety requirements

Family Style Dining

Question: When serving foods on the table by family-style dining (in common serving dishes/trays within reach to the children seated at the table), if a child does not take an item, is it still claimable?

Answer: Yes. However, the provider must encourage the children to take foods, or at least the minimum serving size required.

→ Refer to DPI's [Meal Service Styles](#) resource for more information on the specific requirements to serving meals by family-style dining versus the pre-plated method.

**Thank you for joining us for DPI's monitor
training & asking great questions!**

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1. **mail:**
U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
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Washington, D.C. 20250-9410; or
2. **fax:**
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