



Instructions - Completing the Home Visit (HV) Menu & Product Review Log & Infant Review Log (CACFP Meal Pattern Compliance)

Version 1 (HV Menu & Product Review Log)

CACFP 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. ☑ 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								
Step 1	Step 3			Step 2				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)				Items on Reviewed Menus	HV1 Date	HV2 Date	HV3 Date	Foods On-Hand @ HV (May not align with menu item in left column)				
Whole Grain-Rich (WGR) Items				WGR ☑				Store-Bought Combo Foods (Chick nug, lasagna)/Processed Meats (meatballs)				CN Label /PFS ☑				
1	Y	N	Y	Y	N	HV1		1		Y	N	Y	Y	N	HV1	
2						HV2		2							HV2	
3						HV3		3							HV3	
4						HV1		4							HV1	
5						HV2		5							HV2	
6						HV3		6							HV3	
7						HV1		7							HV1	
8						HV2		8							HV2	
9						HV3		9							HV3	
10						HV1		10							HV1	
11						HV2		11							HV2	
12						HV3		12							HV3	
13						HV1		13							HV1	
14						HV2		14							HV2	
15						HV3		15							HV3	
16						HV1		16							HV1	
17						HV2		17							HV2	
18						HV3		18							HV3	
19						HV1		19							HV1	
20						HV2		20							HV2	
21						HV3		21							HV3	
Breakfast Cereals				Sugar Limit = ≤ 6 grams/dry oz.				Yogurt				Sugar Limit = ≤ 23 grams/6 oz.				
1	Y	N	Y	Y	N	HV1		2	Yogurt (dairy or/and soy)	Y	N	Y	Y	N	HV1	
2						HV2		3		Y	N	Y	Y	N	HV2	
3						HV3				Y	N	Y	Y	N	HV3	
Sugar Limit = ≤ 6 grams/dry oz.				≤ Sugar Limit ☑				WGR ☑				≤ Sugar Limit ☑				
1	Y	N	Y	Y	N	HV1		Cheese cannot be labeled as product; sauce must have CN. Tofu must have 5 gr. protein/ 2.2 oz.								
2						HV2		Cheese / Tofu								
3						HV3		Only List Non-creditable cheese/tofu								
4						HV1		4	Cheese	Y	N	Y	Y	N	HV1	
5						HV2		5							HV2	
6						HV3		6							HV3	
7						HV1		7	Tofu	Y	N	Y	Y	N	HV1	
8						HV2		8							HV2	
9						HV3		9							HV3	

*"On-hand" = All specific foods along with packaging are available during the HV for items on reviewed menus to determine if creditable (Rev. 9/23)

Version 2 (HV Menu & Product Review Log)

CACFP 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

Home Visit 1: Date _____				Home Visit 2: Date _____				Home Visit 3: Date _____			
Menu Review	Items in 1 st column on-hand?	Foods On-Hand @ HV	WGR	Menu Review	Items in 1 st column on-hand?	Foods On-Hand @ HV	WGR	Menu Review	Items in 1 st column on-hand?	Foods On-Hand @ HV	WGR
List WGR Items on Menu (List WGR cereals in section below)	Y N	List brands & names of grains on-hand	☑	List WGR Items on Menu (List WGR cereals in section below)	Y N	List new brands & names of grains on-hand	☑	List WGR Items on Menu (List WGR cereals in section below)	Y N	List new brands & names of grains on-hand	☑
Y N				Y N				Y N			
Y N				Y N				Y N			
Y N				Y N				Y N			
Y N				Y N				Y N			
Y N				Y N				Y N			
Y N				Y N				Y N			
Y N				Y N				Y N			
Y N				Y N				Y N			
List Cereals on Menu (Sugar Limit = ≤ 6 g sugar/dry oz.)		List kinds & brands of cereals On-hand	≤ Sugar Limit ☑ WGR ☑	List Cereals on Menu (Sugar Limit = ≤ 6 g sugar/dry oz.)		List NEW kinds & brands of cereals On-hand	≤ Sugar Limit ☑ WGR ☑	List Cereals on Menu (Sugar Limit = ≤ 6 g sugar/dry oz.)		List NEW kinds & brands of cereals On-hand	≤ Sugar Limit ☑ WGR ☑
☑ Not on menu	Y N			☑ Not on menu	Y N			☑ Not on menu	Y N		
Y N				Y N				Y N			
Y N				Y N				Y N			
Y N				Y N				Y N			
Y N				Y N				Y N			
List Store-Bought Combo Items/Processed meats		List foods and their kinds & brands of Foods On-Hand	CN Label/PFS ☑	List Store-Bought Combo Items / Processed meats		List NEW foods & their kinds & brands On-Hand	CN Label/PFS ☑	List Store-Bought Combo Items / Processed meats		List NEW foods & their kinds & brands On-Hand	CN Label/PFS ☑
☑ Not on menu	Y N			☑ Not on menu	Y N			☑ Not on menu	Y N		
Y N				Y N				Y N			
Y N				Y N				Y N			
Y N				Y N				Y N			
Y N				Y N				Y N			
Yogurt (dairy and/or soy) Sugar Limit = ≤ 23 g sugar/6 oz.		List kinds & brands of yogurt On-hand @ HV	≤ Limit ☑	Yogurt (dairy and/or soy) Sugar Limit = ≤ 23 g sugar/6 oz.		List kinds & brands of yogurt On-hand @ HV	≤ Limit ☑	Yogurt (dairy and/or soy) Sugar Limit = ≤ 23 g sugar/6 oz.		List kinds & brands of yogurt On-hand @ HV	≤ Limit ☑
☑ Not on menu	Y N			☑ Not on menu	Y N			☑ Not on menu	Y N		
Cheese (Cannot be cheese product; sauce must have CN)		Only list kind/brand of non-creditable cheese on-hand @ HV		Cheese (Cannot be cheese product; sauce must have CN)		Only list kind/brand of non-creditable cheese on-hand @ HV		Cheese (Cannot be cheese product; sauce must have CN)		Only list kind/brand of non-creditable cheese on-hand @ HV	
☑ Not on menu	Y N			☑ Not on menu	Y N			☑ Not on menu	Y N		
Tofu (5 gr. protein/2.2 oz.)		Only list kind/brand of non-creditable tofu On-Hand		Tofu (5 gr. protein/2.2 oz.)		Only list kind/brand of non-creditable tofu On-Hand		Tofu (5 gr. protein/2.2 oz.)		Only list kind/brand of non-creditable tofu On-Hand	
☑ Not on menu	Y N			☑ Not on menu	Y N			☑ Not on menu	Y N		

The [DPI-FDCH Sponsor Agreement: CACFP Meal Pattern Documentation & Monitoring Requirements](#) explains the purpose of the HV Menu & Product Review Log and the HV Infant Review Log and is posted under [Guidance Memorandum D: FDCH Sponsor Monitoring Requirements](#).

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)

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)

Overview - Menu Review	
<p>Review Menus (prior & current month to date)</p> <p>→ Identify and list the following:</p> <ul style="list-style-type: none"> • All grains served as WGR • Cereals • Yogurt if served • Potential store-bought combo items • Processed meats potentially requiring CN label/PFS • Cheese • Tofu 	<div style="background-color: yellow; padding: 5px;"> <p>UPDATE for 2024 - Starting 10/1/2023:</p> <p>The following items must also be identified on menus & foods on-hand checked:</p> <ul style="list-style-type: none"> • Cheese - check for creditable cheeses (cheese product is not) • Processed meats that potentially require CN label/PFS </div> <div style="background-color: #fff9c4; padding: 5px; margin-top: 10px;"> <p>Commonly missed items:</p> <p>Polish Sausage (i.e., Kielbasa), turkey bacon, meatballs, potential heat-n-serve pasta dishes (i.e., lasagna, mac & cheese), fish sticks</p> </div>

Overview - Reviewing Foods On-hand	
<div style="background-color: #fff9c4; padding: 5px; margin-bottom: 10px;"> <p>Tips for preparing providers & monitors for this requirement:</p> </div> <p>→ Monitors <u>must check foods on-hand for each item</u> listed in Menu Review column for that HV</p> <p>Includes:</p> <ul style="list-style-type: none"> ○ 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 <ul style="list-style-type: none"> ➢ Cannot just take provider's word! Must see actual foods even if seen before! 	<div style="background-color: #fff9c4; padding: 5px;"> <p>During visit, talk to provider upon arrival about seeing foods on-hand:</p> <ul style="list-style-type: none"> • Explain what is being done & why • Request provider: <ul style="list-style-type: none"> ○ For permission to look at foods in storage areas AND/OR ○ To pull out all required foods on-hand <p>During previsits/ orientations:</p> <ul style="list-style-type: none"> • Inform provider that monitor will need to see foods on-hand during HVs <p>Annual Trainings:</p> <ul style="list-style-type: none"> • Remind providers that monitors will need to see foods on-hand during HVs </div>

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

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

Instructions-Completing the Home Visit (HV) Menu/Product Review Log & Infant Review Log (CACFP Meal Pattern Compliance)

The HV Menu & Product Review Log must be completed for the following foods at each home visit:

Foods requiring product labels/documentation for verifying they meet crediting criteria	
Whole Grain Rich (WGR) Items	Must meet USDA's CACFP WGR criteria
Breakfast Cereals	Must meet sugar limit = ≤ 6 grams per 1 dry oz.
Yogurt	Must meet sugar limit = ≤ 23 grams per 6 oz.
Store-bought Combination Foods	Must be CN labeled or have manufacturer's product formulation statement (PFS))
Processed Meats	May require CN label or PFS)
Cheese	Must be a creditable cheese (cannot be cheese product, imitation cheese, or cheese sauce (unless has CN label/PFS))
Tofu	5 grams of protein per 2.2 oz. of tofu

Log Version 1:

Step 1 (left column) - Menu Review

- Review entire month of most recent claim & current month up to HV date
- List items on menus
 - List each menu item only 1 time throughout the 3 HVs
- 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

- 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
- Mark # (HV1,HV2,HV3) for each HV the specific food (*same brand/name*) is on-hand
- in far right column if food is creditable
 - If non-creditable food is served on HV day, disallow the meal & cite as finding
- Check if foods are on-hand for menu items marked "N" in middle column at prior HV.
 - Further action is required if still "N"

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

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

Log Version 2

Record the Home Visit Date at the top of the respective column.

Step 1 (left column) - Menu Review

- Review entire month of most recent claim & current month up to HV date
- List items on menus
 - List each menu item only 1 time throughout the 3 HVs

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

- 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
- in far right column if food is creditable
 - If non-creditable food is served on HV day, disallow the meal & cite as finding
- Check if foods are on-hand for menu items marked "N" in middle column at prior HV.
 - Further action is required if still "N"

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

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

The next pages provide detailed instructions for completing the *HV Menu & Product Review Log* by going through an example.

Completing the HV Menu & Product Review 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

Version 1 Only

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

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

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

Home Visit 1: Date 8/5/23

Version 2

Menu Review
List items marked as WGR on menus
Bread
English Muffins
Pancakes
List cereals on menus
Oatmeal
RTE Cereal
List items on menus
Fish
Pepperoni
Salami
Yogurt (dairy and soy) Sugar Limit = ≤23 g
Menu Review
<input type="checkbox"/> Not on menu
Cheese (Cannot be labeled as cheese product; sauce must be labeled as such)
Menu Review
<input type="checkbox"/> Not on menu

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	HV 1 Date	HV 2 Date	HV 3 Date	Foods On-Hand @ HV <small>(May not align with menu item in left column)</small>		
Whole Grain-Rich (WGR) Items						
X 1 Bread	Y	N	Y	Y	N	X Sara Lee bread-WW
X 2 English Muffins	Y	N	Y	Y	N	X Thomas English Muffins-WW
X 3 Pancakes	Y	N	Y	Y	N	X Krusteaz Pancake Mix
Breakfast Cereals Sugar Limit=≤ grams/dry oz. ≤ Sugar Limit <input checked="" type="checkbox"/> WGR <input checked="" type="checkbox"/>						
X 2 Oatmeal	Y	N	Y	Y	N	X Quaker Oats plain
X 3 Cold cereal	Y	N	Y	Y	N	X Kix Berry
	Y	N	Y	Y	N	X Honey Nut Cheerios
Items on Reviewed Menus	HV 1 Date	HV 2 Date	HV 3 Date	Foods On-Hand @ HV <small>(May not align with menu item in left column)</small>		
Store-Bought Combo Foods (Chix nug, lasagna)/Processed Meats (meatballs) CN Label /PFS <input checked="" type="checkbox"/>						
X 2 Fish	Y	N	Y	Y	N	X Fish sticks - Gorton
Yogurt Sugar Limit=≤23 grams/6 oz. ≤ Sugar Limit <input checked="" type="checkbox"/>						
X 2 Yogurt (dairy or/and soy)	Y	N	Y	Y	N	X 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						
X 2 Cheese	Y	N	Y	Y	N	X 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

X
HV2
HV3
X
HV2
HV3
X
HV2
HV3

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

Instructions-Completing the Home Visit (HV) Menu/Product Review Log & Infant Review Log (CACFP Meal Pattern Compliance)

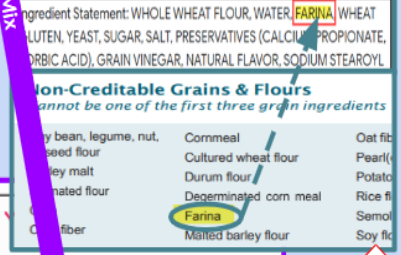
Completing the HV Menu & Product Review Log → Reviewing Foods On-hand

1st HV: 8/5/2023

- WGR Foods
- Cereals

Use [CACFP Reference Guide](#)

Step 2		
Foods On-Hand @ HV (May not align with menu item in left column)		
		WGR
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	WGR
X HV3	Quaker Oats plain	X
X HV	Kix Berry	X
X HV3	Honey Nut Cheerios	



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

any bean, legume, nut,	Cornmeal	Oat fit
seed flour	Cultured wheat flour	Pearl
oat malt	Durum flour	Potato
enated flour	Degerminated corn meal	Rice fl
	Farina	Semol
	Malted barley flour	Soy fl

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

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

WI WIC Approved Cereals

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

Honey Nut Cheerios

Nutrition Facts Label:
9 g sugar / 28 g serv.



Enriched bleached flour (wheat flour, malted thiamin mononitrate, riboflavin, folic acid), s...
flour, stabilized rice bran with germ), degerm...
soybean oil, Less than 2% of: baking soda, d...
cornmeal, monocalcium phosphate, natural phosphate, spices.

The Rule of 3

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

1st HV: 8/5/2023

- Store-bought combo Foods
- Cheese
- Yogurt

Step 2		
Foods On-Hand @ HV (May not align with menu item in left column)		
		CN Label /PFS
X HV2 HV3	Fish sticks - Gorton	
X HV2 HV3	Upstate Farms NF Strawberry	X
X HV2 HV3	Kraft Singles (cheese product)	

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



No CN/PFS



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

14 grams sugar
113 grams serv.

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%

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



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

Yogurt
No more than 23 grams of sugar per 6 ounces.

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

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

Instructions-Completing the Home Visit (HV) Menu/Product Review Log & Infant Review Log (CACFP Meal Pattern Compliance)

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

Step 3a

Version 1 Only

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

Step 3

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

1st HV: 8/5/2023

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 8/5/23	Foods On-Hand @ HV (May not align with menu item in left column)
Whole Grain-Rich (WGR) Items	HV 2 Date	
1 Bread	Y N	Sara Lee bread WW
2 English Muffins	Y N	Thomas English Muffins-WW
3 Pancakes	Y N	Krusteaz Pancake Mix
Breakfast Cereals	HV 3 Date	Sugar Limit=≤6 grams/dry oz. ≤ Sugar Limit <input checked="" type="checkbox"/> WGR <input checked="" type="checkbox"/>
1 Oatmeal	Y N	Quaker Oats plain
2 Cold cereal	Y N	Kix Berry
		Honey Nut Cheerios
Items on Reviewed Menu	HV 1 Date 8/5/23	Foods On-Hand @ HV (May not align with menu item in left column)
Store-Bought Combo Foods (Chix nug, lasagna)/Processed Meats (meatballs)	HV 2 Date	≤ Sugar Limit <input checked="" type="checkbox"/> PFS <input checked="" type="checkbox"/>
1 Fish	Y N	Fish sticks - Gorton
2 Pepperoni	Y N	
Yogurt	HV 3 Date	Sugar Limit=≤23 grams/6 oz. ≤ Sugar Limit <input checked="" type="checkbox"/>
1 Yogurt (dairy or/and soy)	Y N	Upstate Farms NF Strawberry
Cheese / Tofu		Only List Non-creditable cheese/tofu
1 Cheese	Y N	Kraft Singles (cheese product)

Required Home Visit Findings, Disallowances, and Follow-up Chart → Identify from the HV Menu & Product Review Log



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	WGR	
X HV3 Quaker Oats plain	X	X	
X HV3 Kix Berry	X	X	
X HV2 X HV3 Honey Nut Cheerios			
		WGR	
X HV2 Sara Lee bread WW		X	
X HV2 Thomas English Muffins-WW			
X HV3 Krusteaz Pancake Mix			
(lasagna)/Processed Meats (meatballs)		CN Label / PFS	
X HV2 Fish sticks - Gorton			
X HV3 Kraft Singles (cheese product)			

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

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
<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

Foods On-Hand @ HV (May not align with menu item in left column)			
grams/dry oz.	≤ Sugar Limit	WGR	
X HV3 Quaker Oats plain	X	X	
X HV3 Kix Berry	X	X	
X HV3 Honey Nut Cheerios			

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

Required Follow-up

1st HV: 8/5/2023

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.

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			
	8/4/23			(May not align with menu item in left column)			
Whole Grain-Rich (WGR) Items							<input checked="" type="checkbox"/>
Bread	Y	N	Y	N	N	Sara Lee bread W/W	X
English Muffins	Y	N	Y	N	N	Thomas English Muffins-W/W	
Pancakes	Y	N	Y	N	N	Krusteaz Pancake Mix	
Breakfast Cereals Sugar Limit=≤6 grams/dry oz.							≤ Sugar Limit <input checked="" type="checkbox"/>
Oatmeal	Y	N	Y	N	N	Quaker Oats plain	X
Cold cereal	Y	N	Y	N	N	Kix Berry	X
	Y	N	Y	N	N	Honey Nut Cheerios	
Items on Reviewed Menus	HV 1 Date	HV 2 Date	HV 3 Date	Foods On-Hand @ HV			
	8/4/23			(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"/>
Fish	Y	N	Y	N	N	Fish sticks - Gorton	
Pepperoni	Y	N	Y	N	N		
Salami	Y	N	Y	N	N		

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)

Home Visit Review Form
Home Visit Summary Page

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

Subsequent Home Visits

Completing the HV Menu & Product Review Log Version 1

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

2nd HV: 9/30/2023

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						
X 2 3	Bread	Y	N	Y	N	X
X 2 3	English Muffins	Y	N	Y	N	
X 2 3	Pancakes	Y	N	Y	N	
X 1 2 3	Brown rice	Y	N	Y	N	X
X 1 2 3	WW Pasta	Y	N	Y	N	X
X 2 3	Sara Lee bread WW					X
X 2 3	Thomas English Muffins-WW					
X 2 3	Krusteaz Pancakes					
X 1 2 3	Uncle Ben's brown rice					X
X 1 2 3	Marilla WW Rotini					X
Breakfast Cereals						
X 2 3	Oatmeal	Y	N	Y	N	X
X 2 3	Corn cereal	Y	N	Y	N	X
X 2 3		Y	N	Y	N	
X 2 3	Quaker Oats plain					X
X 2 3	Kix Berry					X
X 2 3	Honey Nut Cheerios					
Store-Bought Combo Foods (Chix nug, k)						
X 2 3	Fishi	Y	N	Y	N	
X 2 3	Pepperoni	Y	N	Y	N	
X 2 3	Salami	Y	N	Y	N	
Cheese / Tofu				Only List Non-creditable cheese/tofu		
X 2 3	Cheese	Y	N	Y	N	X
X 2 3						X
X 2 3	Kraft Singles (cheese product)					X

Version 2

2nd HV: Follow the same process as you did for previous HV by completing next 'Home Visit' column to the right.

Start by recording the HV date, then:

- Step 1: Complete the 'Menu Review' Column (left side column)
 - Record all items on the reviewed menus (even if recorded in the 'Menu Review' column for previous HV)
- Step 2: Complete the 'Foods On-hand @ HV' column (right side Column)
 - List new foods that were not on-hand during prior HVs
 - Mark whether these new foods on-hand are creditable

Instructions-Completing the Home Visit (HV) Menu/Product Review Log & Infant Review Log (CACFP Meal Pattern Compliance)

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

Version 1

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

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.

Home Visit 1: Date 8/5/23				Version 2				Home Visit 2: Date 9/30/23			
Store-Bought Combo Items (Ex. chx nug)/Processed meats				Store-Bought Combo Items (Ex. chx nug)/Processed meats							
Menu Review <input type="checkbox"/> Not on menu		Foods On-Hand @ HV		Menu Review <input type="checkbox"/> Not on menu		Foods On-Hand @ HV					
List items on menus	Items in 1 st column on-hand?	List foods & their names/brands on-hand @ HV	CN Label/PFS <input checked="" type="checkbox"/>	List items on menus	Items in 1 st column on-hand?	List <u>NEW</u> foods & their names/brands on-hand @ this HV	CN Label/PFS <input checked="" type="checkbox"/>				
<i>Fish</i>	Y N	<i>Fish sticks - Gorton</i>		<i>Pepperoni</i>	Y N						
<i>Pepperoni</i>	Y N			<i>Salami</i>	Y N						
<i>Salami</i>	Y N				Y N						

Completing Step 3 (Middle Column) for 2nd HV:

➔ Take note of items served on reviewed menus that 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.

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 (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)

	Cred?
w/out CN) / Tofu (5 gr. protein/2.2 oz.)	<input checked="" type="checkbox"/>
X X HV3 Kraft Singles (cheese product)	

Disallowances

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

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.

Version 1

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 cheese product, sauce w/out CN) / Tofu (5 gr. protein/2.2 oz.)						Cred?	
X X 3	Y	N	Y	N	Y	N	X X HV3	
1								
2	Y	N	Y	N	Y	N		
3								

Home Visit 1: Date 8/5/23

Version 2

Home Visit 2: Date 9/30/23

Menu Review	Items in 1 st column on-hand?	Foods On-Hand @ HV	Menu Review	Items in 1 st column on-hand?	Foods On-Hand @ HV
Cheese (Cannot be cheese product; sauce must have CN)		Only list kind/brand of non-creditable cheese on-hand @ HV	Cheese (Cannot be cheese product; sauce must have CN)		Only list kind/brand of non-creditable cheese on-hand @ HV
Menu Review	<input checked="" type="radio"/> Y <input type="radio"/> N	<i>Kraft Singles (cheese-product)</i>	Menu Review	<input checked="" type="radio"/> Y <input type="radio"/> N	<i>Kraft Singles (cheese-product)</i>
<input type="checkbox"/> Not on menu			<input type="checkbox"/> Not on menu		

→ 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

Version 1

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	
Fish	Y	N	Y
Pepperoni	Y	N	Y
Salami	Y	N	Y

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Version 2

Home Visit 1: Date 8/5/23				Home Visit 2: Date 9/30/23			
Store-Bought Combo Items (Ex. chx nug)/Processed meats		Foods On-Hand @ HV		Store-Bought Combo Items (Ex. chx nug)/Processed meats		Foods On-Hand @ HV	
Menu Review	Not on menu	Items in 1 st column on-hand?	List foods & their names/brands on-hand @ HV	Menu Review	Not on menu	Items in 1 st column on-hand?	List NEW foods & their names/brands on-hand @ this HV
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Y	Fish sticks - Gorton	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Y	Pepperoni
<input checked="" type="checkbox"/>	<input type="checkbox"/>	N		<input checked="" type="checkbox"/>	<input type="checkbox"/>	N	Salami
<input checked="" type="checkbox"/>	<input type="checkbox"/>	N		<input checked="" type="checkbox"/>	<input type="checkbox"/>	N	

Home Visit Review Form

9/30/2023

Home Visit Summary Page

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

Instructions-Completing the Home Visit (HV) Menu/Product Review Log & Infant Review Log (CACFP Meal Pattern Compliance)

HV Infant Review Log

The HV Infant Review Log - Updates



Home Visit (HV) Infant Review Log Provider Name _____ Provider # _____ FFY 20 _____

Complete a chart for each enrolled infant @ each HV Menu Review = Review entire month of most recent claim & current month up to HV date (Rev. 8/23)

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

*"N" answers require meal disallowances and corrective action (CA) **"N" answers require CA; more than 1 occurrence requires CA and disallowances

Provided clarification

Changed from a footer note to be a question when comparing items on infant menus to foods on-hand and being served to each infant

Name:	Age: _____ Months	HV Date: _____			
Birthdate:	Menu Review	Complete during HV			
Meal Components	On Menus <input checked="" type="checkbox"/>	Family Sup. <input checked="" type="checkbox"/>	Provider Sup. <input checked="" type="checkbox"/>	Creditable (Y/N)	
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					

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	Family Sup.	Provider Sup.	Creditable (Y/N)
Meal Components	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
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.**

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	Family Sup.	Provider Sup.	Creditable (Y/N)
Meal Components	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
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				

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

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

Name:	Age: _____ Months	HV Date:		
		Complete during HV		
Birthdate:	Menu Review	Family Sup.	Provider Sup.	Creditable (Y/N)
Meal Components	On Menus <input checked="" type="checkbox"/>	Family Sup. <input checked="" type="checkbox"/>	Provider Sup. <input checked="" type="checkbox"/>	
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				

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?

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>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.
<p>Transfer from log to HV Review Form:</p> <ol style="list-style-type: none"> Any findings listed in this chart Disallowances Follow-up when infant menus do not reflect foods on-hand/being served to infant 		<p>NOTE UPDATES</p> <p>UPDATE</p> <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>	