Implementation of the New Production Record Template

Q1: Where do we obtain the new PDE production record template? Can we get it from PEARS?
A: Yes. The template is available on PEARS, Download Forms, PDE013.

Q2: May we continue to use our existing production record sheets or must we implement the new sheets?
A: Sponsors should begin using the updated template as soon as practicable in your operation. PDE has removed the old template from PEARS, so only the updated version is available moving forward. You may also use your own production record, provided that you include the necessary information.

Q3: If a sponsor has completed the production records for the 2015-2016 school year, must they be redone with the new format?
A: Production records that a school food authority (SFA) has already printed out for upcoming meals may be used; however, PDE expects that SFAs using the old version will begin utilizing the updated template as soon as practicable (such as the next time the SFA prints another set of production records for use).

Q4: Are production sheets from PrimeroEdge acceptable?
A: Yes. The PrimeroEdge production records are acceptable and PDE encourages SFAs to utilize them as an alternative to the paper template.

Q5: If we have our cycle menus in PrimeroEdge must we still use the new (paper) production record?
A: Production records are required documentation. SFAs have the option of using the PrimeroEdge production record, PDE's new paper template, or their own production record that contains all of the necessary information.

Q6: I print the production records via NutriKids menu planning software, and my staff fills them in daily to record production data. This data appears to be even more detailed than the new template you introduced in the webinar. Is this acceptable or is the new form still required?
A: You may continue using your current system if it captures the same (or more detailed) information as PDE's production record template.

Q7: Schools using point of service (POS) systems are able to print reports that have all the information that is needed for production records. Considering this, why is it necessary to transcribe this information in a paper form? Why can we not simply save our reports which include this information? Moving this information onto paper takes many hours over a month.
A: If your POS system is part of a USDA-approved, menu-planning software system, and it

includes production records with all of the necessary information, then you may use those production records. In addition, you may print and attach appropriate reports from your POS to your paper-based production record as an alternative to writing in the information. It is not necessary to transcribe duplicate information. For example: If your POS generates a report of the number of reimbursable and non-reimbursable meals sold during the meal service, you can attach that report instead of writing those numbers directly on the production record.

Production Record Format

Q8: Why is it necessary to note the contributions of each item when using PrimeroEdge, considering that our cooks refer to the recipes for production and the recipes already include this information?
A9: PrimeroEdge's production records already include the component contributions for menu items. If you are using PrimeroEdge's production records, then you do not also have to use PDE's paper version. SFAs are encouraged to use PrimeroEdge for their production records for greater efficiency. SFAs utilizing PDE's paper template have the option to omit component contributions on the production record, or even choose to remove that section on their local production record, provided that the component contributions are found within accompanying standardized recipes, reports, etc. The paper template on PEARS is an editable spreadsheet, giving SFAs flexibility to determine what system works best for their operation. If the SFA decides not to record crediting information directly on the production record, and instead relies upon accompanying documentation, staff at each school building must be trained and have an understanding of how each menu item is credited.

Q9: Horizon One Source's production record does not include a component breakdown. Does this mean we cannot use this?
A: As stated above, SFAs can document compliance with the meal pattern without the component breakdown on the production record, as long as the component contributions are found within accompanying standardized recipes, reports, etc., and staff are trained and understand the crediting of menu items.

Q10: Doesn't milk have to be included on the production record?
A: Yes. All menu items part of the reimbursable meal, including fluid milk, must be included on the production record. To conserve space on the form, milk is not listed under the "Component Contributions" section. One cup of fluid milk must always be served as a menu item at meals, which means that the milk component is met as long as one cup of milk is listed on the production record and served to students. (Even when milk credits as a component of a menu item, such as a smoothie, fluid milk must still be offered at that meal in order to fulfil the requirement for milk variety.)

Q11: If the SFA is using another production record format, are the separate columns for the component contributions required by PDE?
A: SFAs must document how menu items credit toward the meal pattern requirements; however, the separate-column formatting used on PDE's updated paper template is not a requirement. For example, the daily food production record reports in PrimeroEdge and production records in some other computer-based software display the component contributions below or next to each menu item (rather than in columns), and this is acceptable.

Q12: Does the "Servings Produced" column equal the "Total Projected Servings" column?
A: Not necessarily. Kitchen staff may look at the number of total projected servings (which may have been determined several weeks in advance) and decide to adjust the quantities produced based on circumstances affecting meal service. For example, staff may decide to produce more servings of a menu item that has recently become very popular, or fewer servings when unexpected changes in attendance occur (weather, class field trips).

Q13: Why doesn't the production record sheet include a column for temperatures?
A: SFAs may add food safety information to their production records, such as temperatures, if desired. Because many SFAs use separate temperature logs, or utilize different procedures when taking temperatures, the production record template does not include this information.

Q14: Under "Menu Item" where it asks for "product name and description" (column 1), how detailed does this need to be? Does this need to include a manufacturer's UPC number or any other? How specific do you want us to be?
A: UPC numbers are not required. It is critical that descriptions include adequate detail to ensure that food service staff know the specific items and recipes to purchase and prepare. This could include, for example, the standardized recipe name/number or the product name/identifier from the manufacturer.

Q15: How do I accurately record "Planned Reimbursable Meals" in a Residential Child Care Institution (RCCI) if I use a meal roster and no POS system?
A: In the box at the top right of the production record, simply record the number of reimbursable student meals that are planned/projected for that meal service. This number is based upon the number of students you expect to be eating that meal at your RCCI. The "Meals Served" number for reimbursable student meals would come from the actual count on your roster for that meal.

Q16: What should be done if the box in the column is too small to fit the required data? For example, if an item is 2 ounces of chicken, ½ cup of rice, and a roll, previously we put "1 portion" in the box. Now the box for "planned portion size" is too small.
A: A menu item made up of chicken, rice, and a roll requires a standardized recipe if these components are always served together as a unit in the meal. A standardized recipe is required for menu items containing more than one ingredient or meal component. It is acceptable to list "1 portion" in the "Planned Portion Size" column for a standardized recipe, because standardized recipes include the specific portioning instructions (e.g., one portion equals 2 ounces of chicken, ½ cup of brown rice, and 1 oz eq whole grain-rich roll). However, if one or more of these components (chicken, rice, or roll) may be declined under offer vs. serve, then those components would have to be listed as separate menu items on the production record, with portion sizes listed accordingly for each.

Q17: If everything is included on the standardized recipe, is it really necessary to include the preparation on the production sheet?
A: No. Only preparation information for the finished recipe (if applicable) would be included on the production record, because the standardized recipe would contain preparation and form information for the ingredients being used.

Q18: We have a lunch count every morning. Is this number the projected number of planned meals?
A: Most likely, no. The menu planner normally plans, in advance of the day of service, the number of meals based upon past participation when that menu (or a similar one) is served. This is known as forecasting. Forecasting is important because weekly menus must be analyzed <u>before</u> serving them to students to validate that they are reimbursable. Lunch counts taken in the morning on the day of service, however, could affect the number of servings actually produced, which would be reflected on the production record in the "Servings Produced" column. If the planned/projected meals or servings are very different from the actual meals or servings prepared and sold, this should be noted on the production record so that adjustments can be made in future meals. Remember to write information under "Comments" that may have affected meal counts on any given day.

Q19: When filling out production records for canned fruit is there a section that can be counted as "servings" or does it have to be in #10 cans?
A: The production record template quantifies all of the menu items in terms of servings now.

Q20: When offering a romaine salad, what is the correct "portion" to note on the production record (½ cup or the actual amount of lettuce used, which is 1 cup)?
A: Both of these are included on the production record. The "Planned Portion Size" is where the SFA indicates the portion as served, which is one cup. In the "Component Contributions" section, the SFA indicates the proper crediting of the romaine lettuce to the meal pattern, which is ½ cup in the dark green vegetable subgroup. This is because leafy greens credit as one half of the volume as served.

Condiments and Usage Recipes

Q21: Do we still need to show condiments on production sheets if they are part of a standardized recipe, or can we just show the recipe number?
A: Condiments must be included in the production record so that they are accounted for accurately. SFAs have several options for documenting condiments: include condiments as part of the standardized recipe for a menu item (e.g. ketchup and mustard included in the recipe for a cheeseburger); list the condiments individually on the production record (e.g. for portion-control packaging); or, utilize a condiment "usage recipe" based on the average daily amount used historically. A condiment recipe is generally used when the meal site utilizes a standard, self-serve condiment bar and offers daily menu items with condiments (e.g. daily hot sandwich line).

Q22: Can you explain how we handle condiments on the production record? If they are included in the standardized recipe, do they still have to be listed separately on the production record? If condiments are not included in the standardized recipe, how should they be documented on the production record? Should we do a condiment usage recipe as we do for milk?
A: Condiments included within a standardized recipe are acceptable because the condiments are accounted for in the recipe itself, and are therefore included on the production record. Depending on the set-up at a particular site – for example, when a condiment bar is available daily – it may make more sense to use a condiment recipe based on a historical study of condiment usage at the site. A condiment recipe would be listed as its own "Menu Item" on the production record. Regardless of the method used, condiments must be included.

Q23: Can a site measure condiment usage during a two-week production period at the beginning of the school year, and then repeat the measurements two more times throughout the school year for an acceptable condiment usage recipe?
A: Yes, this is acceptable. A study should be done at the site for a period of at least one week to determine average usage for the item(s) being measured to determine the condiment recipe. It is a best practice to repeat the usage study at least one additional time later in the school year, as students' preferences can change over time.

Q24: Can you outline the specific process for developing a usage recipe for something such as a salad bar?
A31: A usage recipe for something such as a salad bar is determined at the site level. Staff members should measure how much of each item from the salad bar is selected each day, over at least a one-week period. This is as simple as subtracting the amount of each item leftover on the salad bar from the total amount that was placed on the salad bar during the meal service on each day that week, and then calculating the daily average selected. Usage recipes may be used for menu items consisting of choices that do not vary from day to day, and that have usage that has been documented to be consistent. Some other examples of menu items offered as standardized choices are milk, cold cereals, fruit juices, condiment bars, and assorted salad dressings.

Staff Responsibilities

Q25: Who is responsible for completing the "Component Contributions" section?
A: Normally the menu planner would complete this information.

Q26: How is a cook supposed to accurately fill out the production record column for reimbursable meals since that determination is made by the cashier at the POS?
A2: Completion of the production record typically requires the input of different school nutrition staff members. In this situation, you may decide to have staff at the POS complete the sections in the production record for the number of reimbursable, non-reimbursable, and total meals served.

Administrative Review

Q27: For a review, is it necessary to put your production sheet into PrimeroEdge?
A: No, it is not required. Having your production records completed in PrimeroEdge may reduce the amount of time that the reviewer has to be on-site, because PrimeroEdge's production records can be reviewed online during the off-site portion of the review process. However, if your normal procedure is to implement paper production records, the information entered into PrimeroEdge must match the "source" production records.

Q28: Are we required to use the PDE production record template for the Administrative Review even if our template contains all of the required information?
A: No. In that case, you may use your version.

Q29: Are we required to place the component contributions on the production record for an Administrative Review?
A: SFAs are required to document how menu items credit toward the meal pattern requirements during an Administrative Review. The "Component Contributions" section on the production

record allows SFAs to document proper crediting by indicating the component contributions for each menu item directly on the production record. Alternatively, SFAs may choose to omit component contributions on the production record, or even choose to remove that section on their local production record, <u>provided that the component contributions are found within accompanying standardized recipes, reports, etc</u>. If crediting information is not recorded on the production record, but is available on accompanying documents, food service staff at each school building must be trained and have an understanding of how each menu item is credited.

Q30: If I am undergoing an Administrative Review and I'm using the old production records, will they be accepted or will I get penalized?
A: PDE recognizes that there will be a period of transition as SFAs change to the updated template. PDE expects SFAs using the previous version of the paper template to make the switch as soon as practicable.

Q31: Do we need to print PrimeroEdge records for the past three years plus the current year for our review?
A: No. SFAs using PrimeroEdge for production records do not have to print hard copies of completed production records that are entered into the PrimeroEdge system. Because PrimeroEdge is web-based, the completed production records are maintained within the system and can be viewed online.

<u>Labels</u>

Q32: How do we include information for USDA foods that have no labels?
A: Almost all USDA foods should have labels now, although there still may be some in inventory that do not. If you are using PrimeroEdge or other USDA-approved menu analysis software for your menu planning, the nutrition data for USDA foods are included in the database. Otherwise, you can access the USDA Food Fact sheet for your product, which includes the necessary information for school meals: http://www.fns.usda.gov/fdd/nslp-usda-foods-fact-sheets.

Q33: Do we still need to maintain a hard copy of nutrition facts or other records that are in PrimeroEdge's statewide database?
A: Any records (e.g., CN labels, Product Formulation Statements, Ingredient/Nutrition Facts labels) from products that are scanned into PrimeroEdge do not also have to be maintained on-site in hard copy. The SFA needs to provide some means, such as the product label, to show that the product on hand can be identified with the product in PrimeroEdge database. For example, during an Administrative Review, PDE may verify that the products being used for menu planning in PrimeroEdge are the actual products found in the freezer, in inventory, etc.

<u>Miscellaneous</u>

Q34: Do we still have to list the daily menu on the production record?
A: No. A space for the daily menu was included on PDE's old paper template. That information is not required because all menu items in the reimbursable meal are included on the production record in the first column, and daily menus are listed within the monthly menus for the serving site.

Q35: Is there a way PDE could require all vendors to register their CN label or attestation sheet on one site (perhaps PrimeroEdge) on which we can rely?
A: PDE does not have the authority to require that, although we make every effort to update all PDE-shared ingredients on PrimeroEdge as information is made available from manufacturers.