

# Manager's Corner

## Production Records

### PROJECT COORDINATOR

Theresa Stretch, MS, RDN, CP-FS

### EXECUTIVE DIRECTOR

Aleshia Hall-Campbell, PhD, MPH



NUTRITION



OPERATIONS



ADMINISTRATION



COMMUNICATIONS/  
MARKETING

# Institute of Child Nutrition

## The University of Mississippi

The Institute of Child Nutrition was authorized by Congress in 1989 and established in 1990 at the University of Mississippi in Oxford and is operated in collaboration with The University of Southern Mississippi in Hattiesburg. The Institute operates under a grant agreement with the United States Department of Agriculture, Food and Nutrition Service.

### **PURPOSE**

Improve the operation of child nutrition programs through research, education and training, and information dissemination.

### **VISION**

Lead the nation in providing research, education, and resources to promote excellence in child nutrition programs.

### **MISSION**

Provide relevant research-based information and services that advance the continuous improvement of child nutrition programs.

This project has been funded at least in part with Federal funds from the U.S. Department of Agriculture, Food and Nutrition Service through an agreement with the Institute of Child Nutrition at the University of Mississippi. The contents of this publication do not necessarily reflect the views or policies of the U.S. Department of Agriculture, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. government.

The University of Mississippi is an EEO/AA/Title VI/Title IX/Section 504/ADA/ADEA Employer.

In accordance with Federal law and U.S. Department of Agriculture policy, this institution is prohibited from discriminating on the basis of race, color, national origin, sex, age, or disability.

To file a complaint of discrimination, write USDA, Director, Office of Civil Rights; Room 326-W, Whitten Building, 1400 Independence Avenue, SW, Washington, DC 20250-9410 or call (202) 720-5964 (voice and TDD). USDA is an equal opportunity provider and employer.

© 2019, Institute of Child Nutrition, The University of Mississippi, School of Applied Sciences

Except as provided below, you may freely use the text and information contained in this document for non-profit or educational use with no cost to the participant for the training providing the following credit is included. These materials may not be incorporated into other websites or textbooks and may not be sold.

Suggested Reference Citation:

Institute of Child Nutrition. (2019). *Manager's corner: Production records*. University, MS: Author.

The photographs and images in this document may be owned by third parties and used by the University of Mississippi under a licensing agreement. The University cannot, therefore, grant permission to use these images.

For more information, please contact [helpdesk@theicn.org](mailto:helpdesk@theicn.org).

November 22, 2019

## Table of Contents

Professional Standards .....	1
Introduction .....	1
Lesson Overview.....	2
Questions for Staff.....	2
Activity: Production Records .....	4
References.....	11



## Professional Standards

### FOOD PRODUCTION – 2100

**Employee will be able to effectively utilize food preparation principles, production records, kitchen equipment, and food crediting to prepare foods from standardized recipes, including those for special diets.**

2120 – Food Production Records

Complete a food production record and other required paperwork.

## Introduction

*Manager's Corner: Production Records* is designed to empower managers to use in training their staff. Each lesson is roughly 15 minutes. This lesson plan contains:

- Learning objective
- Statement explaining the importance of the topic
- List of materials
- Instructions on how to present the information
- Questions to ask staff
- An activity to strengthen or refresh the knowledge of the staff

## Lesson Overview

### Instructions for lesson:

- Review the lesson objective and background information.
- Review why it is important.
- Ask staff the questions.
- Facilitate the activity outlined.
- Provide time for staff to ask questions.

**Objective:** Identify the required information and the benefits of production records.

**Background information:** Production records provide documentation to:

- Support meal claims submitted for reimbursement.
- Help manage the program and communicate necessary information for producing reimbursable meals.
- Demonstrate compliance with nutrition standards.

**Why it is important:** The production record is used to document that reimbursable meals were served. Additionally, production records supply a wealth of information for forecasting products, purchasing foods, controlling waste, and identifying popular and not so popular menu items. Production records are part of the Administrative Review process.

## Questions for Staff

- **What is a production record?**

**Answer:** A food production record is a required daily document that records all reimbursable meals prepared and served daily through the National School Lunch Program and School Breakfast Program.

- **What are some benefits of production records?**

**Answer:** The production record provides documentation that supports meeting Federal regulations. Production records also help staff identify the quantity to prepare, predict future production needs, and can help to reduce waste.

- **What are the required elements of a production record used in school nutrition operations?**

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

- Name of school/site
- Grade group
- Date
- Menu
- Menu type (lunch or breakfast)
- Offer Versus Serve (OVS) or Pre-plated (served) – additional information may be included on production records
- Planned (projected) number of student meals – provides an estimate of planned (projected) student meals for the specified grade group
- Actual number of student meals offered (prepared) – provides the total number of student meals offered (prepared) for the specified grade group
- Actual number of student meals selected (served) – provides the total number of student meals selected (served) for the specified grade group
- Planned (projected) number of nonreimbursable meals – the number of staff and guests
- Offered (prepared) number of nonreimbursable meals – the number of staff and guests
- Actual number of nonreimbursable meals selected (served) – provides the total number of nonreimbursable meals selected (served) for the specified school/site
- Menu/food items – all food item choices included on the specified grade group's menu, such as main entrees, vegetable subgroups, fruit, milk, dessert, condiments, and substitutions. For each food item, include product information such as manufacturer item name and code number, USDA Foods information, or specific information to guide preparation.
- Planned (projected), offered (prepared), and selected (served) number of milk by type

## Activity: Production Records

### Activity materials included in this document:

- **Required Information for School Meals Production Record**
- **Sample Daily Menu Production Record**

### Materials provided by the school nutrition operation:

- Copies of handouts
- Copies of the district's production record
- Writing utensils

### Activity Instructions:

- Print the handouts and worksheets.
- Prior to the activity, the manager should identify portions of the production record that their staff is directly responsible for completing accurately, focus the activity on accurately completing those areas to highlight specific job duties.
- Bring enough copies of your district's production record for all staff attending the training.
- Review the information on the **Required Information for School Meals Production Record** and the **Sample Daily Menu Production Record**.
- Ask staff to use the handouts and identify the elements on the district's production record that they are responsible for completing.
- Review the importance of completing accurate, legible production records on a daily basis.



## Required Information for School Meals Production Record

Production Record	Information
<b>Basic Information</b>	<ul style="list-style-type: none"> <li>■ Name of school/site</li> <li>■ Grade group</li> <li>■ Date</li> <li>■ Menu</li> <li>■ Menu type (lunch or breakfast)</li> <li>■ OVS or Pre-plated (served)</li> </ul>
<b>Reimbursable Meals</b>	<ul style="list-style-type: none"> <li>■ <i>Planned (projected) number of student meals</i> – provides an estimate of planned (projected) student meals for the specified grade group</li> <li>■ <i>Actual number of student meals offered (prepared)</i> – provides the total number of student meals offered (prepared) for the specified grade group</li> <li>■ <i>Actual number of student meals selected (served)</i> – provides the total number of student meals selected (served) for the specified grade group</li> </ul>
<b>Nonreimbursable Meals</b>	<ul style="list-style-type: none"> <li>■ <i>Planned (projected) number of nonreimbursable meals</i> – the number of staff and guests</li> <li>■ <i>Offered (prepared) number of nonreimbursable meals</i> – the number of staff and guests</li> <li>■ <i>Actual number of nonreimbursable meals selected (served)</i> – provides the total number of nonreimbursable meals selected (served) for the specified school/site</li> </ul>
<b>All Menu Items Listed</b>	<ul style="list-style-type: none"> <li>■ <i>Menu/food Items</i> – all food item choices included on the specified grade group's menu, such as main entrees, vegetable subgroups, fruit, milk, dessert, condiments, and substitutions. For each food item, include product information such as manufacturer item name and code number, USDA Foods information, or specific information to guide preparation</li> <li>■ <i>Planned (projected), offered (prepared), and selected (served) number of milk by type</i> – fat-free unflavored, fat-free chocolate or other flavors, 1% low-fat unflavored, 1% low-fat chocolate or other flavors</li> </ul>
<b>Recipe/Product Number</b>	<ul style="list-style-type: none"> <li>■ <i>Recipe ID/product ID number</i> – standardized recipe number (USDA or your local recipe number) or product</li> <li>■ <i>ID number</i></li> </ul>

## Required Information for School Meals Production Record, continued

Production Record	Information
<b>Portion Size</b>	<ul style="list-style-type: none"> <li>■ <i>Portion size for the specified grade group</i> – specific unit of measure: scoop number, measuring cup amount, each, ladle or spoodle size, etc.</li> </ul>
<b>Reimbursable Meal Components Provided by Portion Size</b>	<ul style="list-style-type: none"> <li>■ <i>Meats/meat alternates</i> in ounce equivalent (oz eq)</li> <li>■ <i>Grains</i> in oz eq (WGR indicates whole grain-rich)</li> <li>■ <i>Fruits</i> – portion offered in volume, (½ cup in sample)</li> <li>■ <i>Vegetables</i> – portion offered in volume (¼ cup in sample)</li> <li>■ <i>Milk</i> – portion offered in volume (1 cup in sample)</li> </ul>
<b>Meals Planned (Projected), Offered (Prepared), Selected (Served), and Leftover</b>	<ul style="list-style-type: none"> <li>■ <i>Planned (projected) number of servings to prepare</i> – provided by menu planner using forecasting tools (reimbursable and nonreimbursable combined)</li> <li>■ <i>Planned (projected) quantity of food to use in purchase units</i> – forecasted from past production, standardized recipes and Food Buying Guide. Adjust on day-of-service, if needed</li> <li>■ <i>Actual number of servings offered (prepared)</i> – provides total number of servings prepared with any changes from planned (projected) amounts noted, as needed</li> <li>■ <i>Actual number of servings selected (served)</i> – provides total number of servings selected (served) for each food item on the menu; provides information for forecasting future meal preparation</li> <li>■ <i>Substitutions and leftovers</i> – any substitutions for the planned menu must be recorded. Record the amount of leftovers of each item and planned use (examples: chilled and refrigerated for use in future meal, freeze for future use in cycle menu, or discard)</li> </ul>
<b>Verification Signature and Date</b>	<ul style="list-style-type: none"> <li>■ Person in charge of site reviews, verifies, signs and dates the production record, and files for future reference. Your State agency may require signed production records.</li> </ul>

Adapted from USDA’s *Anatomy of a Production Record* Appendix 4.A (2018, September)

# Sample Daily Menu Production Record

## Daily Menu Production Record — Food-Based Menu Planning

Name of school/site \_\_\_\_\_  
 Grade Group \_\_\_\_\_  
 Date \_\_\_\_\_  
 Menu \_\_\_\_\_

Breakfast  
 Lunch  
 OVS  
 Pre-plated (served)

**Reimbursable Meals**  
 Number of student meals planned (projected): \_\_\_\_\_  
 Number of student meals offered (prepared): \_\_\_\_\_  
 Number of student meals selected (served): \_\_\_\_\_

**Nonreimbursable Meals**  
 Number of meals planned (projected): \_\_\_\_\_  
 Number of meals offered (prepared): \_\_\_\_\_  
 Number of meals selected (served): \_\_\_\_\_

R = Reimbursable    NR = Nonreimbursable    T = Total

Menu/Food Items	Recipe ID/ Product ID	Portion Size	Component Contributions Per Portion Size					Planned Servings (Projected)	Planned (Projected) Quantity of Food	Actual Number Serving Offered (Prepared)			Actual Number Servings Selected (Served)			Substitutions, leftovers, and Notes
			Meats/Meat Alternates	Grains	Fruits	Vegetables	Milk			R	NR	T	R	NR	T	

Verifier Signature \_\_\_\_\_

Date \_\_\_\_\_

Adapted from USDA's Anatomy of a Production Record Appendix 4.A

# Daily Menu Production Record — Food-Based Menu Planning

**SAMPLE**

- 1 Name of school/site Eagle's Nest Elementary 5
  - 2 Grade Group K-5
  - 3 Date September 20, 2018
  - 4 Menu Grilled cheese sandwich or Chicken nuggets & Rice pilaf, Broccoli, Cherry tomatoes, Celery sticks, Fruit cocktail, Orange wedges, Milk: assorted fat-free & 1%
- Breakfast**

Lunch

OVS

Pre-plated (served)

**Reimbursable Meals**

6 Number of student meals planned (projected): 50

7 Number of student meals offered (prepared): 45

8 Number of student meals selected (served): 45

**Nonreimbursable Meals**

9 Number of meals planned (projected): 5

10 Number of meals offered (prepared): 5

11 Number of meals selected (served): 4

Menu/Food Items	Recipe ID/ Product ID	Portion Size	Component Contributions Per Portion Size						Planned (Projected)			Actual Number (Prepared)			Actual Number (Served)			Substitutions, leftovers, and Notes	
			16 Meats/Meat Alternates	17 Grains	18 Fruits	19 Vegetables	20 Milk	R	NR	T	R	NR	T	R	NR	T			
																	R		NR
Grilled Cheese Sandwich <i>Details provided on product CN label</i>	R# 32	1 ea	2 oz eq WGR	2 oz eq WGR				24	24			20	20			20	20		25
XYZ Chicken Nuggets w/ WG, 3.97 oz = 2 oz M/M/A, 1 oz WG CN#123456	P# 4203	#6 scoop (6 ea)	2 oz eq WGR	1 oz eq WGR				30	5			30	5			30	5		25
Brown Rice Pilaf, USDA recipe	R# B22	#8 scoop	1 oz eq WGR	1 oz eq WGR				32	5			32	5			32	5		25
Steamed Broccoli Florets (RTU), dark green vegetable	R# 15	2 fl oz spoodle			1/4 C			50	5			50	5			50	5		25
Cherry Tomato (3 ea) <i>RTU: easy-to-use, cleaned, trimmed florets</i>		1/4 C			1/4 C			30				30				30			25
Celery Shreds (3 ea, RTU) <i>RTU: easy-to-use, cleaned, trimmed florets</i>	R# 18	1/4 C			1/4 C			30				30				30			25
<del>Fruit cocktail in light syrup - drained, USDA Foods</del>		4 fl oz spoodle			1/2 C			35	3			35	3			35	3		25
<del>Green Peaches, drained</del>	R# 3	4 fl oz spoodle			1/2 C			15	3			15	3			15	3		25
Orange Wedges (138 count)	R# 5	4 fl oz spoodle			1/2 C			54				54				54			25
Extra: Ranch dressing, 1/2 oz packets	P# 1514	1 ea																	25
Milk by type & flavor	Item#																		25
Fat-free (unflavored)	501	1 cup						5				5				5			25
Fat-Free (chocolate)	502	1 cup						30				30				30			25
1% (unflavored)	503	1 cup						10				10				10			25

26 *Manager Signature* 09/20/2018 Date

Verifier Signature

Adapted from USDA's Anatomy of a Production Record Appendix 4.A

# Sample Daily Menu Production Record, continued

## Anatomy of a Production Record

If you're not clear about how to complete a production record, start by reviewing these details for each numbered item on the sample record:

### BASIC INFORMATION

- 1 Name of school/site
- 2 Grade group
- 3 Date
- 4 Menu
- 5 Menu type (lunch or breakfast) and OVS or Pre-plated (served)

### REIMBURSABLE MEALS

- 6 Planned (projected) number of student meals; provides an estimate of planned (projected) student meals for the specified grade group
- 7 Actual number of student meals offered (prepared); provides the total number of student meals offer (prepared) for the specified grade group
- 8 Actual number of student meals selected (served); provides the total number of student meals selected (served) for the specified grade group

### NONREIMBURSABLE MEALS

- 9 Planned (projected) number of nonreimbursable meals – the number of staff and guests
- 10 Offered (prepared) number of nonreimbursable meals the number of staff and guests
- 11 Actual number of nonreimbursable meals selected (served); provides the total number of nonreimbursable meals selected (served) for the specified school/site

### ALL MENU ITEMS LISTED

- 12 Menu/food items – all food item choices offered on the specified grade group's menus, such as main entrees, vegetable subgroups, fruit, milk, dessert, condiments, and substitutions. For each food item, include product information such as manufacturer item name and code number, USDA Foods information, or specific information to guide preparations
- 13 Planned (projected), offered (prepared), and selected (served) number of milk by type—fat-free, 1% low-fat unflavored, 1% low-fat chocolate or other flavors

### RECIPE/PRODUCT NUMBER

- 14 Recipe ID/product ID number – standardized recipe number (USDA or your local recipe number) or product ID

### PORTION SIZE

- 15 Portion size for the specified grade group – specific unit of measure: scoop number, measuring cap amount, each, ladle or spoodle size, etc.

### REIMBURSABLE MEAL COMPONENTS PROVIDED BY PORTION SIZE

- 16 Meats/meat alternates in ounce equivalent (oz eq)
- 17 Grains in oz eq (WG indicates whole grain-rich)
- 18 Fruits – portion offer in volume, (% cup in sample)
- 19 Vegetables – portion offer in volume (% cup in sample), note that subgroup is identified in column #14
- 20 Milk – portion offered in volume (1 cup in sample)

### MEALS PLANNED (PROJECTED), OFFERED (PREPARED), SELECTED (SERVED), AND LEFTOVER

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

### VERIFIER SIGNATURE & DATE

- 26 Person in charge of site review, verifies, signs, and dates the production record, and files for future reference. Your State agency may require signed production records

### OTHER DETAILS YOU MAY NEED OR WANT TO RECORD ARE:

- Food preparation and holding temperatures
- Specific information of value for preparation, service, and future forecasting, such as weather-related school closures, field trips, etc.
- Food Buying Guide details – source of calculations for purchase units required for total servings planned
- Additional required information by your State agency or school program

The sample is one example of a production record. Use the format that best fits your programs.

Adapted from USDA's *Anatomy of a Production Record* Appendix 4.A



## References

Institute of Child Nutrition. (2019). *STAR: Meal preparation and service instructor's manual*. University, MS: Author.

United States Department of Agriculture. (2015). *Professional standards for school nutrition professionals*. Retrieved from <https://www.fns.usda.gov/school-meals/professional-standards>

United States Department of Agriculture. (2018, November 8). *Menu planner for school meals: School year 2018-2019*. Retrieved from: <https://www.fns.usda.gov/tn/menu-planner>



The University of Mississippi  
School of Applied Sciences

800-321-3054  
[www.theicn.org](http://www.theicn.org)