Manager’s Corner

Production Records

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VISION
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MISSION
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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

<table>
<thead>
<tr>
<th>Production Record</th>
<th>Information</th>
</tr>
</thead>
</table>
| **Basic Information** | Name of school/site  
| | Grade group  
| | Date  
| | Menu  
| | Menu type (lunch or breakfast)  
| | OVS or Pre-plated (served)  |
| **Reimbursable Meals** | 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  |
| **Nonreimbursable Meals** | 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  |
| **All Menu Items Listed** | 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 – fat-free unflavored, fat-free chocolate or other flavors, 1% low-fat unflavored, 1% low-fat chocolate or other flavors  |
| **Recipe/Product Number** | Recipe ID/product ID number – standardized recipe number (USDA or your local recipe number) or product  
| | ID number |
## Required Information for School Meals Production Record, continued

<table>
<thead>
<tr>
<th>Production Record</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Portion Size</strong></td>
<td>- <em>Portion size for the specified grade group</em> – specific unit of measure:</td>
</tr>
<tr>
<td></td>
<td>scoop number, measuring cup amount, each, ladle or spoodle size, etc.</td>
</tr>
<tr>
<td><strong>Reimbursable Meal Components Provided by Portion Size</strong></td>
<td>- <em>Meats/meat alternates</em> in ounce equivalent (oz eq)</td>
</tr>
<tr>
<td></td>
<td>- <em>Grains</em> in oz eq (WGR indicates whole grain-rich)</td>
</tr>
<tr>
<td></td>
<td>- <em>Fruits</em> – portion offered in volume, (½ cup in sample)</td>
</tr>
<tr>
<td></td>
<td>- <em>Vegetables</em> – portion offered in volume (¼ cup in sample)</td>
</tr>
<tr>
<td></td>
<td>- <em>Milk</em> – portion offered in volume (1 cup in sample)</td>
</tr>
<tr>
<td><strong>Meals Planned (Projected), Offered (Prepared), Selected (Served), and Leftover</strong></td>
<td>- <em>Planned (projected) number of servings to prepare</em> – provided by menu</td>
</tr>
<tr>
<td></td>
<td>planner using forecasting tools (reimbursable and nonreimbursable combined)</td>
</tr>
<tr>
<td></td>
<td>- <em>Planned (projected) quantity of food to use in purchase units</em> –</td>
</tr>
<tr>
<td></td>
<td>forecasted from past production, standardized recipes and Food Buying</td>
</tr>
<tr>
<td></td>
<td>Guide. Adjust on day-of-service, if needed</td>
</tr>
<tr>
<td></td>
<td>- <em>Actual number of servings offered (prepared)</em> – provides total number of</td>
</tr>
<tr>
<td></td>
<td>servings prepared with any changes from planned (projected) amounts noted,</td>
</tr>
<tr>
<td></td>
<td>as needed</td>
</tr>
<tr>
<td></td>
<td>- <em>Actual number of servings selected (served)</em> – provides total number of</td>
</tr>
<tr>
<td></td>
<td>servings selected (served) for each food item on the menu; provides</td>
</tr>
<tr>
<td></td>
<td>information for forecasting future meal preparation</td>
</tr>
<tr>
<td></td>
<td>- <em>Substitutions and leftovers</em> – any substitutions for the planned menu</td>
</tr>
<tr>
<td></td>
<td>must be recorded. Record the amount of leftovers of each item and planned</td>
</tr>
<tr>
<td></td>
<td>use (examples: chilled and refrigerated for use in future meal, freeze</td>
</tr>
<tr>
<td></td>
<td>for future use in cycle menu, or discard)</td>
</tr>
<tr>
<td><strong>Verification Signature and Date</strong></td>
<td>- Person in charge of site reviews, verifies, signs and dates the production</td>
</tr>
<tr>
<td></td>
<td>record, and files for future reference. Your State agency may require</td>
</tr>
<tr>
<td></td>
<td>signed production records.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Verifier Signature</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Name of school/site</th>
<th>Genre Group</th>
<th>Menu</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Breakfast</th>
<th>Lunch</th>
<th>Dinner</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Non-reimbursable Meals</th>
<th>Reimbursable Meals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of meals planned (projected):</td>
<td>Number of meals prepared:</td>
</tr>
<tr>
<td>Number of meals served selected:</td>
<td>Number of meals served selected:</td>
</tr>
<tr>
<td>Number of meals served selected:</td>
<td>Actual Number of meals served selected:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quantity of Food (projected):</th>
<th>Quantity of Food (prepared):</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Component Contributions Per Portion Size</th>
<th>Portion Size</th>
<th>Product ID</th>
<th>Recipe ID</th>
<th>Menu/Food Items</th>
</tr>
</thead>
</table>
Sample Daily Menu Production Record, continued

<table>
<thead>
<tr>
<th>Name of school/district</th>
<th>Grade Group</th>
<th>Date</th>
<th>Menu</th>
<th>Breakfast</th>
<th>Lunch</th>
<th>DVS</th>
<th>Pre-plated (seven)</th>
<th>Portion Size</th>
<th>Recipe/ID</th>
<th>Manager's Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eagle's Nest Elementary</td>
<td>K-3</td>
<td>September 13, 2018</td>
<td>Grilled cheese sandwich or Chicken nuggets, Corn chips, Broccoli, Cherry tomatoes, Milk, Assorted Barries &amp; 1%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Manager's Corner: Production Records
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 offered (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 cup 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 4.4

