



Manager's Corner

Production Records

PROJECT COORDINATOR

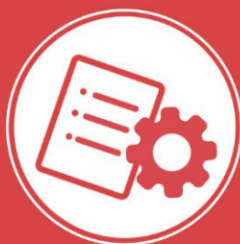
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The University of Mississippi

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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.

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Suggested Reference Citation:

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

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November 22, 2019

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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
Basic Information	<ul style="list-style-type: none"> ■ Name of school/site ■ Grade group ■ Date ■ Menu ■ Menu type (lunch or breakfast) ■ OVS or Pre-plated (served)
Reimbursable Meals	<ul style="list-style-type: none"> ■ <i>Planned (projected) number of student meals</i> – provides an estimate of planned (projected) student meals for the specified grade group ■ <i>Actual number of student meals offered (prepared)</i> – provides the total number of student meals offered (prepared) for the specified grade group ■ <i>Actual number of student meals selected (served)</i> – provides the total number of student meals selected (served) for the specified grade group
Nonreimbursable Meals	<ul style="list-style-type: none"> ■ <i>Planned (projected) number of nonreimbursable meals</i> – the number of staff and guests ■ <i>Offered (prepared) number of nonreimbursable meals</i> – the number of staff and guests ■ <i>Actual number of nonreimbursable meals selected (served)</i> – provides the total number of nonreimbursable meals selected (served) for the specified school/site
All Menu Items Listed	<ul style="list-style-type: none"> ■ <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 ■ <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
Recipe/Product Number	<ul style="list-style-type: none"> ■ <i>Recipe ID/product ID number</i> – standardized recipe number (USDA or your local recipe number) or product ■ <i>ID number</i>

Required Information for School Meals Production Record, continued

Production Record	Information
Portion Size	<ul style="list-style-type: none"> ■ <i>Portion size for the specified grade group</i> – specific unit of measure: scoop number, measuring cup amount, each, ladle or spoodle size, etc.
Reimbursable Meal Components Provided by Portion Size	<ul style="list-style-type: none"> ■ <i>Meats/meat alternates</i> in ounce equivalent (oz eq) ■ <i>Grains</i> in oz eq (WGR indicates whole grain-rich) ■ <i>Fruits</i> – portion offered in volume, (½ cup in sample) ■ <i>Vegetables</i> – portion offered in volume (¼ cup in sample) ■ <i>Milk</i> – portion offered in volume (1 cup in sample)
Meals Planned (Projected), Offered (Prepared), Selected (Served), and Leftover	<ul style="list-style-type: none"> ■ <i>Planned (projected) number of servings to prepare</i> – provided by menu planner using forecasting tools (reimbursable and nonreimbursable combined) ■ <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 ■ <i>Actual number of servings offered (prepared)</i> – provides total number of servings prepared with any changes from planned (projected) amounts noted, as needed ■ <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 ■ <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)
Verification Signature and Date	<ul style="list-style-type: none"> ■ 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.

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

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[illegible]Verifier Signature

Date _____

Sample Daily Menu Production Record, continued

Manager's Corner: Production Records

SAMPLE

Daily Menu Production Record — Food-Based Menu Planning

1 Name of school/site Eagle's Nest Elementary 5 Breakfast ☐ Lunch ☒ OVS ☒ Pre-plated (served) ☐

2 Grade Group K-5 6 Number of student meals planned (projected): 50 9 Number of meals planned (projected): 5

3 Date September 20, 2018 7 Number of student meals offered (prepared): 45 10 Number of meals offered (prepared): 5

4 Menu Grilled cheese sandwich or Chicken nuggets & Rice pilaf, Broccoli, Cherry tomatoes, Celery sticks, Fruit cocktail, Orange wedges, Milk: assorted fat-free & 1% 8 Number of student meals selected (served): 45 11 Number of meals selected (served): 4

12 Menu/Food Items

R = Reimbursable NR = Nonreimbursable T = Total

Menu/Food Items		Recipe ID/ Product ID	Portion Size	Component Contributions Per Portion Size					Planned (Projected)			Actual Number Serving Offered (Prepared)			Actual Number Serving Selected (Served)			Substitutions, leftovers, and Notes
				Meats/Meat Alternates	Grains	Fruits	Vegetables	Milk	R	NR	T	R	NR	T	R	NR	T	
12	Menu/Food Items	14	15	16	17	18	19	20	21	22	23	24	25					
13	Grilled Cheese Sandwich	R# 32	1 ea	2 oz eq	2 oz eq WGR				24	48 sl WG bread 3lb cheese	20	20	20	No leftovers, all children were offered both choices				
	XYZ Chicken Nuggets w/ WG, 3.97 oz = 2 oz M/NA, 1 oz WG CN#123456	P# 4203	#6 scoop (6 ea)	2 oz eq	1 oz eq WGR				30	5.6 lb	30	5	35	28	4	32	3 servings leftover, discarded	
	Brown Rice Pilaf, USDA recipe	R# B22	#8 scoop		1 oz eq WGR				32	1 gal	32	5	37	31	3	34	1 1/4 cups leftover, discarded	
	Steamed Broccoli Florets (RTU), dark green vegetable	R# 15	2 fl oz spoodle			1/4 C			50	1.75 lb	50	5	55	49	4	53	0.5 cup leftover, chilled and refrigerated for use in soup tomorrow	
	Cherry Tomato (3 ea) celery sticks other vegetable	RTU: ready-to-use, cleaned, trimmed florets R# 18	1/4 C 1/4 C			1/4 C 1/4 C			30 30	2.5 lb 2.25 lb	30 30		30	24 26		24 26	1 1/4 cups cherry tomatoes & 1 cup celery leftover, bagged & refrigerated for use in soup tomorrow	
	Fruit cocktail in light syrup, drained, USDA Foods Diced Peaches, drained	R# 3	4 fl oz spoodle			1/2 C			35 3	2 #10 cans	35	3	38	25	3	28	Substituted peaches, 5 cups leftover; refrigerated for use in breakfast tomorrow	
	Orange Wedges (138 count)	R# 5	4 fl oz spoodle			1/2 C			15 3	4.5 lb	25	2	27	35	2	37	No leftovers, made 10 more servings, 3 more to use	
	Extra: Ranch dressing, 1/2 oz packets	P# 1514	1 ea						54	54 ea	50		50	45		45	5 leftover, returned to inventory	
	Milk by type & flavor	Item#																No leftovers
	Fat-free (unflavored)	501	1 cup					1 cup	5	5	5	5	5	28	40	5	28	40
	Fat-Free (chocolate)	502	1 cup					1 cup	30	30	30	28	28	28	28	28	28	28
	1% (unflavored)	503	1 cup					1 cup	10	10	10	10	10	10	10	10	10	10

09/20/2018

Manager Signature

Verifier Signature

Date

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

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, (½ cup in sample)
- 19 Vegetables – portion offer in volume (¼ 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

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

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