

Directions for Menu Worksheet

*****Updated 9/3/2014 for SY 2014-15 Breakfast *****

Welcome to the FNS Menu Worksheet, a tool designed to assist School Food Authorities (SFAs) in demonstrating that each of the menus meets the new meal pattern for the National School Lunch Program (NSLP) and School Breakfast Program (SBP).

General Information:

- Performance-based certification is district- based, and all menu types within the district must be submitted for certification. Individual schools may *not* apply for six cents reimbursement.
- Every unique breakfast and lunch menu type offered must be entered into the worksheet, using a new worksheet for each menu.
- Menu type examples: Grade K-5 breakfast, K-5 lunch, Grade 6-8 breakfast, etc.
- Refer to FNS memorandum SP-31-2012 for detailed information on *distinct menus*.
- *This worksheet does NOT assess compliance on a per-serving line basis- all reimbursable meals must be entered in one worksheet (one menu type). Separate from the menu worksheet, SFAs must sign an attestation stating each serving line is in compliance with the meal pattern.*
- Worksheet is programmed based on a 5-day school week. Alternate-day worksheets are also available on the USDA website. SFAs should utilize an alternate worksheet if operating on an alternate schedule on a regular basis (SFAs should NOT submit a menu worksheet for a holiday week as this does not represent the typical week of meals).
- Certification is based on *offered* menus- do not consider Offer versus Serve options. Report the full offering of fruits and vegetables on the menu, NOT what a child typically selects. The *menu worksheet* is not weighted. Refer to SP 10-2012 for definitions of *planned, offered, and served*.

BREAKFAST Overview

-There are new requirements for breakfast in SY 2014-15. Requirements for three components (Grains, Fruit, and Milk) are assessed.

-Optional Meats/Meat Alternates may be credited toward the Grains component at breakfast. For each reimbursable meal, users should enter the total amount of Grains PLUS Meat/Meat Alternate crediting toward Grains.

-Optional Vegetables may be credited toward the Fruits component at breakfast. For each reimbursable meal, users should enter the total amount of Fruits PLUS Vegetables crediting toward Fruits.

-Beginning SY 2014-15, all grains must be whole grain-rich. It is only applicable to total GRAINS offered, *not* Meat/Meat Alternate credited toward the weekly Grains requirement.

Special Considerations

-Some vegetables and fruits do not credit on a volume as served basis (i.e. 1 cup credits as 1 cup).

-Dried fruit- twice the volume as served

-Raw leafy greens- half the volume as served

-Tomato paste- refer to manufacturer information (typically twice volume served)

-Conversion *must be made first*, and CREDITABLE amounts entered into the certification worksheet. A yellow warning box appears when leafy greens or tomato paste is selected from the vegetable subgroups list, reminding users to enter creditable amounts.

Example:

Menu: Salad with 2 cups of romaine lettuce

Report: Select "1" cup of vegetable (dark green) from drop-down box

-To ensure data entered is not lost, remember to save the information periodically.

Getting Started:

Materials needed:

- 1 week menu (5 days)
 - Portion sizes for all reimbursable menu items
 - Contribution information for each menu item (CN Labels, [USDA Foods Fact Sheets](#))
 - Standardized Recipes
 - Production Records
 - [Food Buying Guide](#)
 - [Food Buying Guide Calculator](#)
- Complete a separate Certification worksheet for each of the three grade groups (K-5, 6-8 and 9-12). A separate Certification worksheet has been developed for breakfast and lunch. There is also a K-8 worksheet and a K-12 worksheet for breakfast if a single menu is used.
- A 3-, 4-, 6-, and 7-day worksheet for each grade group is also available. There is also an extended worksheet for lunch for schools with more than 50 main dishes per week.
- An SFA submits menu worksheets for each distinct menu for both breakfast and lunch.
- If there is more than one menu type per grade group, SFAs must submit a different worksheet for each menu type. For example, if there are two different elementary school menus, two K-5 worksheets are required.
- If multiple schools within the same grade group are served by a single menu, only *one* worksheet is required.
- Menu worksheets should be sent to the State Agency for review and final approval.

Menu Worksheet Orientation

- Open the Excel file corresponding to the appropriate grade group and menu. Example instructions here are based on *Grade 9-12 Breakfast*.
- Each Excel file has eleven tabs located at the bottom of the spreadsheet, including the Simplified Nutrient Assessment (optional).
- Each tab is labeled with the following titles:
- Menu Worksheet Instructions*: quick review of the worksheet instructions. On the other tabs (All Meals, Monday, etc.) there are hyperlinks labeled “Go to Instructions” that will take the user back to this tab

- SFA Notes*: blank text box for SFA to enter comments for State Agency reviewers
 - All Meals*: first tab requiring data entry
 - Monday*: to report meals and vegetable subgroups offered this day
 - Tuesday*: as above
 - Wednesday*: as above
 - Thursday*: as above
 - Friday*: as above
 - Weekly Report*: results of weekly meal pattern requirement check
 - Nutrient Instructions (optional)*: for Simplified Nutrient Assessment; see separate instructions document
 - Nutrient Assessment (optional)*: for Simplified Nutrient Assessment
- Click on the tab at the bottom of the spreadsheet to transfer to a different tab.
- Directions below begin with the “All Meals” spreadsheet, which requires the bulk of information input.
- ***Follow these steps in order for accurate results. Accuracy of menu certification results are based on accuracy of information entered.

“SFA Notes” tab

- Clicking on the text box inside this tab allows SFAs opportunity to submit comments to the State agency during certification reviews.

“All Meals” Tab

- Title of this worksheet indicates meal period (Breakfast or Lunch) and grade group. *Ensure the correct version of the Certification worksheet is used for the menu.*
- Enter the SFA name and menu number (for SFAs with multiple menus within a single grade group). If only one menu per grade group, type “1.”
- Column 1 lists Meal Names (all meals offered across the week).

-Other columns list various food components within the meal pattern- Total Grains (including Grains plus credited Meats/Meat Alternates) (3a), Whole grain-rich Grains (3b), Meats/Meat Alternates credited (3c), Fruit (4), Fruit/Vegetable Juice (4a), Non-starchy Vegetables (4b), Starchy Vegetables (4c), and Fluid Milk (4).

-Food component columns also list appropriate units of measure (ounce equivalents, cups, etc.).

-Components are color-coded (e.g., Fruit = purple) throughout worksheet.

-Just above columns 1 and 3 is a hyperlink to the Food Buying Guide Calculator, above columns 3a and 3b is a hyperlink to the Menu Worksheet Instructions tab, and above column 4 is a hyperlink to the Weekly Report tab.

-At the far right of the screen the section “Optional Tools to Assist in Fraction and Decimal Calculations” can assist SFAs in adding fractions and converting between decimals and fractions.

Column 1: Meal Name

***IMPORTANT: For this *menu worksheet only*, SFAs must list *reimbursable meals offered* on the menu. Each reimbursable meal consists of all required food components: any grain/meat/meat alternates in a main and/or side dish, minimum total amount of fruit offered with this meal, and amount of milk.

-All *unique* reimbursable meals offered over the course of the entire week must be entered- one meal per row of the worksheet. If the same main dish is offered with the same quantity of fruit and milk is available every day, enter it only once (if *types* of fruits or milk change, still enter on only one row).

Meal Name Example 1:

Meal offered Monday: Bagel w/cream cheese, 1 cup peaches, fat-free unflavored milk

Meal offered Wednesday: Bagel w/cream cheese, 1 cup apples, fat-free flavored milk

Result: Enter “Bagel w/cream cheese” **once** in Column 1, with 1 cup fruit, 1 cup milk

-However, if the same main dish is offered with *different* quantities of fruit, it must be entered as two separate entries in Column 1 (two rows).

Meal Name Example 2:

Meal offered Monday: Bagel w/cream cheese, 1 cup peaches, fat-free unflavored milk

Meal offered Wednesday: Bagel w/cream cheese, ½ cup apples, fat-free flavored milk

Result: Enter “Bagel w/cream cheese with 1 cup fruit,” with 1 cup fruit, 1 cup milk

AND enter “Bagel w/cream cheese with ½ cup fruit,” with ½ cup fruit, 1 cup milk

-Types of milk will be recorded on a different tab.

- Type name of complete reimbursable meal. To assist the State reviewer, enter the name of the main dish to match the menu submitted for certification. (e.g., if breakfast sandwich is called “Morning Glory wrap,” type “Morning Glory wrap” into worksheet).

Meal Name Example 3:

Meal #1:

Bagel w/cream cheese – 3oz grains, no creditable m/ma

Mixed Fruit Cup – ½ cup

100% Orange Juice – 4 oz

Milk – 8 oz

Result: Enter “Bagel w/cream cheese” in column 1 (NOT all components)

- Note: worksheet example meal, “Bagel w/cream cheese,” DOES NOT add to daily or weekly totals.

-For items incorrectly entered in the Meal Name column, click the box and select backspace to clear all text from the box.

Entering Meal Components into the “All Meals” Spreadsheet

-Once the meal name for Meal #1 has been entered, the meal components and corresponding serving sizes must be entered.

-NOTE: For all drop-down menus in the following sections, to “clear out” an erroneous selection, click on the box with the incorrect data, scroll UP to the empty space option (just above 1/8) and select. This will clear out any information from the drop-down box.

Column 2a: GRAINS plus Meats/Meat Alternates Counting Toward Grains (ounce equivalents)

-Enter amount of grains AND credited meats/meat alternates in the reimbursable meal. Include ALL whole-grain rich grains, non-whole grain-rich grains, AND creditable meats/meat alternates here.

-Because there is wide variation in serving sizes, type in the correct serving sizes.

- Do NOT enter text (such as “4 oz”); this will result in an error message.

-All grains and meats/meat alternates are measured in either ounce equivalents and must be *rounded down to the nearest quarter*. Make this calculation prior to entering in worksheet. The worksheet also makes this adjustment automatically.

-Beginning in SY 2013-14, SFAs must use ounce equivalents for all grains (based on 16 gram creditable grain)

Grains Example 1:

Entered: Total grains = “1.7”

Result: Worksheet rounds to “1.5”

-Do NOT enter text (such as “4 oz”)- this will result in an error message.

-Breeding *must* be credited beginning in SY 2013-14.

- All grains in the meal **MUST** be included in this column.

Column 2b: Whole Grain-Rich Grains (ounce equivalents)

-Enter quantity of whole grain-rich grains contained in meal (Meal #1). Report in *ounce equivalents* (e.g., 1.25 oz eq roll).

-If no whole grain-rich grains in this meal, either leave cell blank or type in zero (“0”)

Grains Example 3:

Meal offers 1 slice enriched bread (1 oz eq grain) and 0.5 oz eq whole grain-rich crackers

Result: 0.5 oz eq whole grain-rich grains (enter “0.5” into column 2a)

***For SY 2014-15 and SY 2015-16, SFAs with State approval to offer non-whole grain-rich pasta may count this product as “whole grain-rich” for purposes of certification but should note this in the “SFA notes” section to ensure the State is aware of this temporary flexibility.**

Column 2c: Meats/Meat Alternates Crediting Toward Grains (oz equivalents)

- Enter amount of meat/meat alternates offered in the entrée and/or side dishes in ounce equivalents (to the nearest quarter ounce).

- Do NOT enter text (such as “4 oz”)- this will result in an error message.

-If no credited meats/meat alternates in this meal, either leave cell blank or type in zero (“0”).

Example 4:

Meal offers 1 slice enriched bread (1 oz eq grain) and 1oz eq scrambled eggs

Result: 1.0 oz eq meat/meat alternates (enter “1” into column 3b)

****Meats/meat alternates offered as additional foods are NOT reported on the menu worksheet, but MUST be accounted for in a nutrient analysis or nutrient assessment****

Columns 3, 3a, 3b, and 3c: Fruit (cups)

-Use drop down menu to enter total minimum quantity of fruit, juice (fruit and vegetable), non-starchy vegetables and starchy vegetables offered with this meal. Options range from 1/8 cup (smallest creditable amount) to 2 cups.

-This component includes *both* fruit and vegetable pieces and juice- there is a juice limit beginning in SY 2014-15 but Column 4 is a total of both fruit pieces and juice offered with each meal.

-In column 3a, select only the cups of fruit OR vegetable juice offered with the meal.

-In column 3b, select the cups of non-starchy vegetables being credited toward the fruit component.

-In column 3c, select the cups of starchy vegetables being credited toward the fruit component. It is important to capture this information to make sure that within the week, at least 2 cups of non-starchy vegetables are offered in order to allow starchy vegetables to also credit toward the fruits component.

-The crediting calculation for dried fruit must be done PRIOR to entering fruit quantities in worksheet- enter only CREDITABLE amounts.

Example 1:

Meal offers ½ cup mixed fruit and 4 oz (1/2 cup) 100% orange juice

Result: ½ cup fruit + ½ cup juice = 1 cup fruit (select “1” in column 4)

Example 2:

Meal offers ¼ cup of boxed raisins

Result: ¼ cup raisins = ½ cup fruit (select “½” in column 4)

-REMINDER: Conversion *must be made first*, and CREDITABLE amounts entered into the certification worksheet. A yellow warning box appears when leafy greens or tomato paste is selected from the vegetable subgroups list, reminding users to enter creditable amounts.

Column 4: Milk (cups)

- Enter minimum amount of milk offered. Report in *cups*- not ounces. If ounces are entered (e.g. “8”), a warning prompt pops up to check if value is accurate.

-Information entry for Meal #1 is now complete. Repeat Step 5 for all reimbursable meals available within the 5-day week.

-There is space for up to 50 meals offered in a week-contact the State for an alternate (expanded) form if needed.

MONDAY Tab

-Using the drop-down boxes in the “Meal Name” column, click on meals offered on MONDAY (one meal per row). If 10 meals are offered, there should be 10 rows of information filled in.

-The new school meal pattern requires that for schools with multiple serving lines, all lines meet the daily and weekly meal pattern requirements. However, this worksheet does NOT assess compliance on a per-serving line basis- all reimbursable meals must be entered in one worksheet (one menu type). Separate from the menu worksheet, SFAs must sign an attestation stating each serving line is in compliance with the meal pattern.

-Therefore, list all meals available to a child, on any line on any given day.

-To remove a meal selected in error: click on the box, scroll up to the very top, and select the empty space option. This will clear out all information for that specific row.

- Enter up to 20 meals offered per day- if more than 20 meals are offered per day, contact the State Agency for an expanded version of this worksheet.

-Once the meal is selected, other columns within that row automatically fill in from data previously entered in the “All Meals” tab.

Fruit/Vegetable/100% Juice, Grain (optional Meat/Meat Alternate) and Milk Component Check

-Columns are color-coded, matching columns in the “All Meals” tab. The first column shown (in purple) is “Fruit/Vegetable/100% Juice.” There are five columns for this component.

-The first column shows the quantity of the total Fruit component, previously typed in.

-The second column, also purple, shows the quantity of the fruit/vegetable juice, previously typed in.

-The third column, also purple, shows the quantity of the non-starchy vegetables, previously typed in.

-The fourth column, also purple, shows the quantity of the starchy vegetables, previously typed in.

-The fifth column, colored yellow, calculates if the meal selected meets the daily requirement this component.

Component Check Example:

Offered meal is for breakfast in grades 9-12 and daily fruit requirement = 1 cup.

In “All Meals” tab, user typed in Bagel w/cream cheese (with 1 ¼ cups fruit)

Result: “Daily Fruit Requirement Check 1 cup” column turns green and reads “Yes”

-If the entered quantity does not meet the daily minimum, the Requirement Check column turns red and reads “No.”

-The same applies to the Grains and Milk components. There is NOT a daily check for whole grain-rich grains.

-Once all meals offered on Monday have been added, the worksheet will report if each meal meets all DAILY requirements. Weekly requirement assessment is carried out in a future step.

Milk Component Variety Check

-Scroll to the right side of the screen to the “Milk Type” table (colored brown).

- Click the small checkbox next to each type of milk offered on Mondays. Check one or more boxes. When finished, the yellow column in this section turns green (Yes) or red (No).

TUESDAY- FRIDAY Tabs

-Repeat steps taken in MONDAY tab for Tuesday, Wednesday, Thursday, and Friday tabs.

Weekly Report

-This tab compiles all daily and weekly information to check if all requirements have been met.

-There are columns for Monday-Friday, Weekly Total, Weekly Requirement (cups or oz eq), and Weekly Requirement Check

-On the left side of the sheet, in rows, are the food components. The Monday-Friday columns show the amount of each component entered each day of the week.

-The Weekly Total, a light gray color, lists the amount of the component offered over the entire 5-day week. To the right is the Weekly Requirement, a beige-yellow color.

-The Weekly Requirement Check becomes green (Yes) if the requirement was met, and red (No) if not met.

-This tab also assesses the weekly requirement for whole grain-rich grains (ALL of the grain offerings are whole grain-rich).

-For Total Grains, the daily minimum and maximum offerings each day are shown. These are added together to report total weekly minimum grains offered.

Flexibility for Weekly Maximums (Grains)

-Beginning in January 2014, USDA provided permanent flexibility in assessing grains and meats/meat alternates for compliance with the weekly ranges (maximums only). SFAs should contact their State agencies for additional information regarding these flexibilities.

-There is *no change* in the measurement of the required minimum quantities for grains and meats/meat alternates. All menus submitted by SFAs must meet the daily and weekly minimum quantities for all food components.

-The weekly maximum limit for both the grains and meat/meat alternate components may be exceeded in the USDA Menu Worksheet for purposes of certification. This means that **State agencies will consider any submitted menu compliant with the grains component**

requirements or the meats/meat alternates component requirements even if the tool displays that the menu exceeds these weekly maximums

-However, to be certified as compliant with the new school lunch meal patterns, all menus submitted by SFAs for certification purposes MUST meet all of the remaining food component requirements. All menus must also meet all dietary specifications, including calorie minimums and maximums.

-State agencies should provide technical assistance, as needed, to SFAs that submit menus that utilize this flexibility and report grain and/or meat/meat alternate maximums above the weekly limit. Additionally, State agencies will carefully examine submitted nutrient analyses or simplified nutrient assessments to ensure that the weekly average calorie maximum is not exceeded.

Nutrient Instructions/Simplified Nutrient Assessment (OPTIONAL)

-For SFAs choosing to use the Simplified Nutrient Assessment, refer to separate document entitled “Nutrient Assessment Directions.”

Frequently Asked Questions

(please refer to SP 44-2012 for additional Menu Worksheet Q&As)

How often will SFAs be required to submit menus for certification?

This is a one-time process. The only time an SFA will resubmit (with revisions) is if an SFA is denied certification after initial submission.

How long is the certification?

Permanent; no expiration date. SFAs will be assessed for ongoing compliance with the meal pattern through administrative reviews.

Is there a minimum amount of days required?

A 5-day week’s worth of menus must be entered. If an SFA regularly operates on a shorter or longer week, contact the State Agency for assistance.

How is the week selected for review?

The SFA has the discretion to select any week for certification.

On average, what is the estimated time this process will take per site entered?

It is highly variable, depending on how complex the menu is, but testing estimates ranged from as little as 1 hour per menu to over three hours. The majority of the time investment occurs with

obtaining information on crediting and portion sizes for all items offered on the menu. The data input takes far less time.

How do I show an optional grain offering on this worksheet?

All grains must be counted toward daily and weekly requirements, therefore even optional grains must be included with the meal. However, if a menu is designed so that a child has the option to take an additional grain offering, such as a dinner roll, SFAs must enter TWO rows in the All Meals tab, and list both meals on the day this option is offered.

Example: Spaghetti w/sauce and roll (3 oz eq grains)

Spaghetti w/sauce, no roll (2 oz eq grains)