

School Nutrition Program (SNP) Records Retention List

Contracting Entities (CEs) must retain documentation that demonstrates program compliance. The following list describes the records—electronic and paper—that TDA provides as forms, samples, and templates for these purposes. Please note, when a CE is not required to use a TDA form, sample, or template, the record the CE uses must include all information provided on the TDA form, sample, or template.

The forms, samples, and templates below are organized by topic.

CEs will find additional information on records retention in the *Administrator's Reference Manual*. See the *Additional Information* note for each record listed for the section which will contain information on use of that record.

TDA contact addresses for submitting forms are located at the end of this document.

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Civil Rights

Food & Nutrition Pre-Award Civil Rights Compliance Review

Last updated October 23, 2019

Located in TX-UNPS | Applications | Download Forms (SNP-003) and on SquareMeals.org

To provide information to determine civil rights compliance status before an organization is approved for participation in a Child Nutrition Program (CNP).

- Must use this form.
- Submit to TDA as directed if new program operator.

Additional Information: Section 2, Program Application & Agreement; Section 19, Other Operational Issues

Gender Separation Exemption Request Form

Last updated April 26, 2019

Located in TX-UNPS | Applications | Download Forms (SNP-000) and on SquareMeals.org

To request an exemption to the prohibition on gender-separated meal service.

- Must use this form.
- Submit to TDA as directed on the form.
- Must have an approved exemption prior to implementation.

Additional Information: Section 2, Application and Agreement; Section 19, Other Operational Issues

Sample Complaint Form

Last updated November 3, 2017

Located on SquareMeals.org

To provide a method for parents and the general public to submit a complaint to the CE.

- Use this form or an alternate method that provides the same information.
- Retain onsite.
- Submit all complaints received to TDA Austin office.

Additional Information: Section 19, Other Operational Issues

Competitive Foods

Competitive Food (Smart Snacks) Worksheet

Last updated September 23, 2016

Located on SquareMeals.org

To determine if a food item meets the Competitive Food Nutrition Standards (Smart Snacks).

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 20, Competitive Food Nutrition Standards

Counting and Claiming

Daily Records

Daily Record/ Accuclaim Form Community Eligibility Provision (CEP) (and Attendance Calculator)

Last updated May 5, 2018

Daily Record/ Accuclaim Form Provision 2 (P2) (and Attendance Calculator)

Last updated May 7, 2018

Daily Record/Accuclaim Form (and Attendance Calculator)

Last updated May 24, 2018

Located on SquareMeals.org

Daily Record/Accuclaim Form | Afterschool Programs (and Attendance Calculator)

Last updated February 10, 2020

Located on SquareMeals.org

To verify accuracy of meal claiming by eligibility category daily and use for monthly cumulative review. May provide helpful information for procurement forecasting.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 5, Special Provision Options; Section 7, Counting and Claiming; Section 10, Afterschool Meal Programs

Monthly by Classroom Coded List Form

Last updated February 28, 2013

Located on SquareMeals.org

To record the total number of reimbursable meals served by eligibility category.

- Create cumulative daily and monthly reports.
- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 7, Counting and Claiming; Section 19, Other Operational Issues

Onsite Monitoring

Onsite Monitoring Form | Afterschool Care Program (ASCP) and Child and Adult Care Food Program At-Risk (CACFP At-Risk)

Last updated January 23, 2020

Located on SquareMeals.org

Onsite Monitoring Form | Community Eligibility Provision (CEP)

Onsite Monitoring Form | National School Lunch Program (NSLP)

Onsite Monitoring Form | Provision 2 (P2), Year 2 and Following Years

Onsite Monitoring Form | School Breakfast Program (SBP)

Onsite Monitoring Form | Seamless Summer Option (SSO)

Last updated October 26, 2016

Located on SquareMeals.org

To monitor or self-assess CE compliance with program regulations and promote effective program management.

- Use this form or an alternate method that provides the same information within the first four weeks of operation and again before the program ends for the school year.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility; Section 5, Special Provision Options; Section 7, Counting and Claiming; Section 8, Breakfast; Section 9, Lunch; Section 10, Afterschool Meal Programs; Section 12, Seamless Summer Option

Policy Statement for Free and Reduced-Price Meals, Attachment B: Meal Count/Collection Procedures (Attachment B)

Located in TX-UNPS | Applications

To submit detailed information on the CE's counting and claiming process, point of service process, and charge policy.

- Must use this form.
- Submit in TX-UNPS | Applications for new program operators.
- Must be updated and approved before changes in processes are implemented for existing operators.

Additional Information: Section 2, Application and Agreement; Section 7, Counting and Claiming; Section 15, Meal Pricing; Section 19, Other Operational Issues

Attachment B: Upload Attachments, Directions for Uploading Certification and Benefit Issuance Documentation in TX-UNPS

Last updated July 16, 2020

Located on TX-UNPS | Applications | Download Forms (SNP-134)

To submit household applications, directions, and letter; eligibility notification letters; and media release.

- Must use this form.
- Submit in TX-UNPS | Applications.
- Must be submitted annually.

Additional Information: Section 2, Application and Agreement; Section 7, Counting and Claiming; Section 15, Meal Pricing; Section 19, Other Operational Issues

Policy Statement for Free Milk, Attachment B: Meal Count/ Collection Procedures (Attachment B)

Last updated February 20, 2011

Located on TX-UNPS | Applications | Download Forms (SNP-008) and on SquareMeals.org

To submit detailed information on the CE's counting and claiming process, point of service process, and charge policy.

- Must use this form.
- Submit to TDA as described in the form directions for new program operators.
- Must be updated and approved before changes in process are implemented for existing operators.

Additional Information: Section 2, Application and Agreement; Section 7, Counting and Claiming; Section 19, Other Operational Issues; Section 27, Special Milk Program

Severe Need Approval Request Form

Located in TX-UNPS | Applications | Download Forms (SNP-007)

To request approval for Severe Need Breakfast or Severe Need Lunch reimbursement for CEs/sites that have operated NSLP less than two years.

- Must use this form.
- Submit to TDA as described in the form directions.

Additional Information: Section 7, Counting and Claiming

Special Milk Program Worksheet

Last updated August 28, 2017

Located on SquareMeals.org

To provide a sample of the documentation and information needed for the CE to submit a claim.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 7, Counting and Claiming; Section 27, Special Milk Program

SSO/SFSP Non-Congregate Feeding Data Submission Form

Located in TX-UNPS | Applications | Download Forms (SNP-109 or SFSP-000)

To submit claim data for months when an SSO or SFSP served noncongregate meals under the summer meal service non-congregate feeding demonstration project.

- Must use this form.
- Submit to TDA as described in the form directions.

Additional Information: Section 7, Counting and Claiming; Section 12, Seamless Summer Operation

Weekly/ Monthly Number Coded List Form

Last updated February 28, 2013

Located on SquareMeals.org

To record the total number of reimbursable meals served by eligibility category.

- Use this form or an alternate method that provides the same information.
- Create cumulative weekly and monthly reports.
- Retain onsite.

Additional Information: Section 7, Counting and Claiming; Section 19, Other Operational Issues

Eligibility

Community Eligibility Provision (CEP) Calculation Worksheet for Identified Student Percentage (ISP) and Claiming

Last updated January 10, 2018

Located on SquareMeals.org

To calculate the identified student percentage and claiming percentage for the community eligibility provision.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 5, Special Provision Options; Section 7, Counting and Claiming

Community Eligibility Provision (CEP) Federal Reimbursement Estimator Worksheet

Last updated July 11, 2014

Located on SquareMeals.org | National School Lunch Program | Special Provisions

To determine the financial feasibility of adopting CEP for counting and claiming.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 5, Special Provision Options; Section 7, Counting and Claiming

Income and Categorical Application Checklist

Last updated July 18, 2018

Located on SquareMeals.org

To assist CEs in making income and categorical eligibility determinations.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility; Section 6, Verification

Income Eligibility Guidelines for Determining Free and Reduced-Price Benefits

Last updated April 15, 2020

Located on SquareMeals.org

To provide the income criteria for determining eligibility for free and reduced-price meals for NSLP/SBP.

Additional Information: Section 4, Determining Eligibility

Income Eligibility Guidelines for Determining Free Milk Benefits

Last updated April 15, 2020

Located on SquareMeals.org

To provide the income criteria for determining eligibility for free milk benefits.

Additional Information: Section 4, Determining Eligibility; Section 27, Special Milk Program

Letter to Household, Eligibility Based on Free Milk Application

Last updated February 13, 2020

Located on SquareMeals.org

To provide a sample notification letter when the CE has determined student/child eligibility based on information reported on an application.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility; Section 27, Special Milk Program

Letter to Household, Eligibility Based on Household Meal Application

(Available in Spanish)

Last updated February 13, 2020

Located on SquareMeals.org

To provide a sample notification letter when the CE has determined student eligibility based on information reported in an application.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility

Letter to Household, Predetermined Eligibility for Individual Student(s)

(Available in Spanish)

Last updated February 13, 2020

Located on SquareMeals.org

Letter to Household, Predetermined Free Eligibility for Household

(Available in Spanish)

Last updated February 13, 2020

Located on SquareMeals.org

Letter to Household, Predetermined Reduced-Price Eligibility for the Household

(Available in Spanish)

Last updated February 13, 2020

Located on SquareMeals.org

To provide a sample notification letter when the CE has predetermined that one or some of the students in household are eligible for free meals.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility

Letter to Household (CEP)

(Available in Spanish)

Last updated English, February 13, 2020; Spanish, July 31, 2020

Located on SquareMeals.org

To provide information to parents about free meal benefits prior to or during the first week of school or as students enroll to encourage participation.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 5, Special Provision Options

Letter to Household Provision (P2), Non-Base Year and Letter to Household Provisions 2 (P2) Base Year

Last updated February 13, 2020

Located on SquareMeals.org

To provide information to parents about student free meal benefits prior to or during the first week of school or as students enroll to encourage participation.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility; Section 5, Special Provision Options

Media Release

Media Release for Free and Reduced-Price Meals Provision 2 Schools Sample

(Available in Spanish)

Media Release for Free and Reduced-Price Meals Sample

(Available in Spanish)

Media Release for Free and Reduced-Price Meals Sample Form, Community Eligibility Provision (CEP) Sample

(Available in Spanish)

Last updated English, February 13, 2020; Spanish, July 31, 2020

Located on SquareMeals.org

To provide information to parents about the National School Lunch Program and/or School Breakfast Program.

- Use this form or an alternate method that provides the same information prior to or during the first week of school to encourage household participation.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility; Section 5, Special Provision Options

Media Release for Free Milk Sample Form, Special Milk Program (SMP)

Last updated February 13, 2020

Located on SquareMeals.org

To provide information to parents about free milk benefits.

- Use this form or an alternate method that provides the same information to encourage household participation.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility; Section 27, Special Milk Program

Multi-Child or Multi-Use Free Milk Application (SMP), Letter to the Household, and Instructions

(Available in Spanish)

Last updated letter on May 8, 2018

Located on SquareMeals.org

To provide method for households to apply for free milk benefits.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility; Section 27, Special Milk Provision

Standard (Multi-Child), Standard (Multi-Child) Nonpublic School, Multi-Use Application Free and Reduced-Price School Meals Application (NSLP and SBP), Letter to the Household, and Instructions

(Available in Spanish)

Last updated April 15, 2020

Located on SquareMeals.org

To provide method for households to apply for meal benefits.

- Use this form or an alternate method that provides the same information prior to or during the first week of school or as students enroll.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility

Provision 2 (P2) Application Form

Last updated September 27, 2019

Located in TX-UNPS | Applications | Download Forms (SNP-119)

To apply, re-establish, or renew an application to operate P2.

- Must submit this form to TDA as described on the form before May 31.
- Retain onsite.

Additional Information: Section 2, Application and Agreement; Section 5, Special Provision Options

Provision 2 (P2) Feasibility Worksheet

Last updated April 10, 2013

Located on SquareMeals.org

To assess the financial feasibility of adopting Provision 2 for counting and claiming.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 5, Special Provision Options; Section 7, Counting and Claiming

Scanned and Web-based Application Checklist, National School Lunch Program (NSLP), School Breakfast Program (SBP), and Special Milk Program (SMP)

Last updated August 20, 2015

Located in TX-UNPS | Applications | Download Forms (SNP-000)

To assess if a scanned or web-based household application processing system meets requirements.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility

Eligibility, Verification

Preliminary Verification Report

Last updated July 1, 2019

Located in TX-UNPS | Applications | Download Forms (SNP-123)

To submit an official count of students enrolled, directly certified and verified, and with approved applications.

- **Must use this form.**
- **Submit to TDA as described in the form directions by February 1.**

Additional Information: Section 4, Determining Eligibility; Section 6, Verification

Verification Information Request | SNAP/TANF Multiple Applicant Form

(Available in Spanish)

Verification Information Request | Statement of Social Security Income Form

(Available in Spanish)

Verification Information Request | Statement of Earnings Form

(Available in Spanish)

Last updated February 13, 2020

Located on SquareMeals.org

To request proof of eligibility for the verification process.

- Use this form or an alternate method that provides the same information.
- **Must be completed by November 15 unless conducting verification for cause.**
- **Retain onsite.**

Additional Information: Section 4, Determining Eligibility; Section 6, Verification

Verification Notification | Continuation of Benefits Letter

(Available in Spanish)

Last updated English, February 13, 2020; Spanish, July 31, 2020

Located on SquareMeals.org

To inform parents or guardians about verification results when benefits are continued.

- Use this form or an alternate method that provides the same information.
- **Must be completed within 10 days of verification but not later than November 15 unless conducting verification for cause.**
- **Retain onsite.**

Additional Information: Section 4, Determining Eligibility; Section 6, Verification

Verification Notification | Selection Letter for Household

(Available in Spanish)

Verification of Free and Reduced-Price Eligibility | Information for Households

(Available in Spanish)

Last updated February 13, 2020

Located on SquareMeals.org

To inform parents or guardians of household's selection for the verification process and provide information on what documents to provide

- Use this form or an alternate method that provides the same information
- Retain onsite

Additional Information: Section 4, Determining Eligibility; Section 6, Verification

Verification Notification | Results/ Adverse Action Letter—Income

(Available in Spanish)

Last updated February 13, 2020

Located on SquareMeals.org

Verification Notification | Results/ Adverse Action Letter—Foster

(Available in Spanish)

Last updated February 13, 2020

Located on SquareMeals.org

Verification Notification | Results/ Adverse Action Letter—SNAP/TANF

(Available in Spanish)

Last updated February 13, 2020

Located on SquareMeals.org

To inform parents or guardians about verification results when benefits are discontinued or reduced.

- Use this form or an alternate method that provides the same information.
- Must be completed within 10 days of verification but not later than November 15 unless conducting verification for cause.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility; Section 6, Verification

Verification Report

Located in TX-UNPS | Application Module

To submit results of verification process.

- Must use this form.
- Submit to TDA in TX-UNPS | Application Screen by February 1.

Additional Information: Section 4, Determining Eligibility; Section 6, Verification

Verification Report | Individual Household Form

Last updated March 29, 2018

Located on SquareMeals.org

To provide an accurate record of verification process household contacts and responses.

- Must use this form.
- Must be completed by November 15 unless conducting verification for cause.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility; Section 6, Verification

Verification Sample Pool Calculator

Last updated June 2, 2017

Located in TX-UNPS | Application | Download Forms (SNP-123)

To assist CEs in calculating the number of applications to include in the verification sample pool.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 4, Determining Eligibility; Section 6, Verification

Financial

Approved Purchase List

Last updated January 15, 2016

Located on SquareMeals.org

To assist CEs in maintaining a list of approved and procured suppliers/contractors for specified products and/or services.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Audit

Provided by auditor

To provide documentation of yearly financial audit, if required.

- Submit to TDA within 30 days of receipt from the auditor or nine months after the end of the CE's audit period, whichever comes first, and upload to the Federal Audit Clearinghouse.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds

Budget Tool

Last updated April 26, 2016

Located on SquareMeals.org

To calculate income and expenditures by program and for all programs and provide helpful information for calculating the proportion of nonprogram and program income and costs.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Buy American Checklist for Non-Domestic Product Purchases

Last updated June 25, 2018

Located on SquareMeals.org

To provide assistance in determining if a non-domestic food purchase is allowable and to provide information on the documentation required for non-domestic food product purchases.

- Use this form and or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement; Section 22, Food Service Contracts

Capital Expenditure Request

Located in TX-UNPS | Applications

To submit request for approval for equipment or facility improvement costs that exceed \$5,000.

- Must use this form.
- Submit in TX-UNPS | Applications.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion for Covered Contracts

Last updated February 2017

Located on SquareMeals.org

To provide documentation that the entity has met the requirements related to the Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion for Covered Contracts.

- Use this form or an alternate method that provides the same information (1) if a new program operator when submitting an FSMC contract for approval or (2) if a new program operator.
- Must (1) submit to TDA when submitting an FSMC contract for approval as directed by staff or (2) retain onsite if a new program operator.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement; Section 22, Food Service Management Company

Daily Record of Income—National School Lunch Program and School Breakfast Program Form

Last updated April 29, 2013

Located on SquareMeals.org

To record information on program income each day to be reviewed weekly and yearly. May provide helpful information for procurement forecasting.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Financial Report

Located in TX-UNPS | Applications

Directions for Form

Last updated January 23, 2020

Located in TX-UNPS | Applications | Download Forms (SNP-117)

To submit financial information. May be helpful in calculating the proportion of nonprogram and program costs and income.

- Must use this form.
- Submit in TX-UNPS | Applications between March 1 and April 1 of each year.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Food Service Pro-Rata Share of Exclusive Beverage Contract Form

Last updated May 1, 2013

Located on SquareMeals.org

To record pro-rated share of exclusive beverage contracts.

- Must use this form.
- Retain onsite.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Income from Food Service Operations Form

Last updated April 29, 2013

Located on SquareMeals.org

To retain information on program income daily and reviewed monthly and yearly. May provide helpful information for procurement forecasting.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Informal Small Purchase Log

Last updated January 15, 2016

Located on SquareMeals.org

To maintain a list of informal small purchase procurements and the method for determining the most advantageous bid.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Micro-Purchase Log

Last updated January 15, 2016

Located on SquareMeals.org

To document a list of micro-purchases to track micro-purchases and assess the equitable distribution of purchases.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Physical Inventory of Purchased Food Form

Last updated April 5, 2013

Located on SquareMeals.org

To document food inventory. May provide helpful information for procurement forecasting.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 14, Financial Information Concerning School Nutrition Fund; Section 17, Procurement; Section 21, USDA Foods

Plan for Reducing Excessive Operating Fund Balance

Last updated April 26, 2016

Located on SquareMeals.org

To submit plan for reducing an excessive operating food service fund balance (net cash resources).

- Must use this form.
- Submit to TDA as described in the form directions.

Additional Information: Section 14, Financial Information

Program/ Nonprogram Cost and Revenue Proportion Calculation Worksheet

Last updated April 28, 2015

Located on SquareMeals.org

To calculate the ratio of nonprogram and program costs and revenue proportions.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Record of Program Expenditures Form

Last updated April 29, 2013

Located on SquareMeals.org

To document information on program expenditures for daily expenditures; reviewed weekly, monthly, and yearly. May also be helpful in calculating proportion for nonprogram and program income and costs.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Food Safety

Cooler or Freezer Temperature Recording Form

Last updated April 5, 2013

Located on SquareMeals.org

To maintain documentation of temperatures for cooling and freezing units.

- Use this form or an alternate method that provides the same information daily with cumulative monthly and yearly reporting.
- Retain onsite.

Additional Information: Section 18, Sanitation and Food Handling

Food Safety Inspections

Located in TX-UNPS / Applications

To report information about required safety inspections for all sites.

- Must use this form.
- Submit to TDA in TX-UNPS | Applications.

Additional Information: Section 18, Sanitation and Food Handling

Hazard Analysis Critical Control Point (HACCP) Checklist (FND-104) and Hazard Analysis Critical Control Point (HACCP) Plan

Last updated January 1, 2015

Located in TX-UNPS | Applications | Download Forms (SNP-011) and on SquareMeals.org

To create, review, and implement the CE's HACCP plan and procedures and update as needed.

- Must use this form.
- Submit in TX-UNPS | Applications if new program operator.

Additional Information: Section 2, Application and Agreement; Section 18, Sanitation and Food Handling

Food Service Management Company

Cover Letter, School Nutrition Programs Food Service Management Company Request for Proposal and Contract; School Nutrition Programs Food Service Management Company Request for Proposal and Contract

Located on SquareMeals.org | Programs | National School Lunch Program | NSLP Administration & Forms | Food Service Management Companies

To provide information necessary for approval of a request for proposal (RFP) and contract from a food service management company (FSMC).

- Must use this form.
- Submit to TDA as described on the form.

Required Timeline

- RFP by February 15.
- Unsigned contract by April 30.
- Signed and approved contract by July 1.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Food Service Management Company (FSMC) Application for Registration, Appendix A and Food Service Management Company Registration Cover Sheet

Located on SquareMeals.org | Programs | National School Lunch Program | NSLP Administration & Forms | Food Service Management Companies

To submit for approval by TDA and register as a food service management company (FSMC) in Texas.

- Must use this form.
- Submit to TDA as described in the form directions by August 1.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement; Section 22, Food Service Management Company

Food Service Management Company (FSMC) Monitoring Form

Last updated February 23, 2017

Located on SquareMeals.org

To monitor an FSMC contract.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 22, Food Service Contracts

Food Service Management Company Approved Vendor List

Located on SquareMeals.org | Programs | National School Lunch Program | NSLP Administration & Forms | Food Service Management Companies

To provide the list of TDA-approved food service management companies (FSMCs) that is updated by October 1 of each year.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement; Section 22, Food Service Management Company

Request for Proposal and Contract No. ____ Between ____ SFA, and ____ FSMC, First Amendment

Located on SquareMeals.org | Programs | National School Lunch Program | NSLP Administration & Forms | Food Service Management Companies

To modify an existing FSMC contact a request for proposal (RFP) and contract from a food service management company.

- Must use this form.
- Submit to TDA as described in the form directions.
- Must be submitted and approved before implementation.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement; Section 22, Food Service Management Company

TDA Contract Checklist, School District/Food Service Management Company, New Contract for Food Service Management

Located on SquareMeals.org

To submit a request for proposal (RFP) and contract from a food service management company for TDA approval.

- Must use this form.
- Submit to TDA as described in the form directions.

Timeline

- RFP by February 15
- Unsigned contract by April 30
- Signed and approved contract by July 1

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Local Wellness

Student-Parent Involvement Activity Form

Last updated April 15, 2013

Located on SquareMeals.org

To document involvement of students and parents or guardians.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 19, Other Operational Issues

Local Wellness Policy (LWP) Checklist

Last updated December 9, 2016

Located on SquareMeals.org

To assist CEs in developing a local wellness policy and a plan for implementation that is reviewed each year.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 19, Other Operational Issues

Meal Accommodations

Meal Accommodation Tracking Form

Last updated May 1, 2017

Located on SquareMeals.org

To assist CEs in maintain documentation and tracking meal accommodations.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 13, Accommodating Students with Medical Disabilities and Special Dietary Needs

Medical Statement Sample Form

Last updated May 1, 2017

Located on SquareMeals.org

To demonstrate the information that must be submitted in a medical statement in order for a CE to provide a meal accommodation.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 13, Accommodating Students with Medical Disabilities and Special Dietary Needs

Meal Pattern

Daily Food Production Records for Central Kitchen, Receiving Kitchen, and Onsite Production

Last updated June 1, 2020

Located on SquareMeals.org

To record detailed information on menued food items specific to the meal pattern requirements. Adding information on menued a la carte items is optional. May provide helpful information for procurement forecasting.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 8, Breakfast; Section 9, Lunch; Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Fluid Milk Substitute Worksheet

Last updated June 30, 2017

Located on SquareMeals.org

To notify TDA when the CE plans to use a fluid milk substitute.

- Must use this form.
- Submit to TDA as described in the form directions.

Additional Information: Section 13, Accommodating Students with Medical Disabilities and Special Dietary Needs; Section 19, Other Operational Issues

Food-Based Menu Portion Planning Template

Last updated October 8, 2012

Located on SquareMeals.org

To develop menus that meet the NSLP meal pattern. May also provide helpful information for procurement forecasting.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 8, Breakfast; Section 9, Lunch; Section 14, Financial Information Concerning School Nutrition Funds; Section 17, Procurement

Product Formulation Statement

Product Formulation Statement for a Grains Product—Statement Template

Product Formulation Statement for Fruit Products—Statement Template

Product Formulation Statement for Meat/Meat Alternate (M/MA) Products—Statement Template

Product Formulation Statement for Vegetable Products—Statement Template

Last updated February 9, 2015

Located on SquareMeals.org

To provide product information, nutrient content, and serving size when a child nutrition label is not available.

- Must use this template on company letterhead or use USDA Food Buying Guide letterhead template.
- Retain onsite.

Additional Information: Section 8, Breakfast; Section 9, Lunch; Section 11, Pre-Kindergarten (Pre-K Meal Pattern for School Nutrition Programs (SNP) Operators; Section 24, Child Nutrition (CN) Labeling and Product Documentation

Residential Child Care Institution (RCCI) Age/Grade Group Meal Pattern Exemption Request Form

Last updated November 11, 2018

Located in TX-UNPS | Applications | Download Forms (SNP-000)

To request an exemption to serve the same age/grade group meal pattern or type of milk to all RCCI age/grade portions for SSO meal service.

- Must use this form.
- Submit to TDA as described in the form directions.
- Must receive approval before implementing this exemption.

Additional Information: Section 26, Residential Child Care Institutions

Seamless Summer Option (SSO) Age/Grade Group Meal Pattern Portion Size Exemption

Last updated June 5, 2018

Located in TX-UNPS | Applications | Download Forms (SNP-000)

To request an exemption to serve the most common age/grade portions for SSO meal service.

- Must use this form.
- Submit to TDA as described in the form directions.
- Must receive approval before implementing this exemption.

Additional Information: Section 12, Seamless Summer Operation

Meal Pattern Certification

Attestation of Compliance with the New Meal Pattern Requirements Form

Provided by TDA staff

To attest that CE will continue to meet the meal pattern requirements (1) after meal pattern certification has been achieved if new program operator or (2) if performance-based reimbursement has been suspended.

- Must use this form.
- Submit in TX-UNPS | Applications | Application Packet as directed by TDA staff.

Additional Information: Section 2, Application and Agreement; Section 2C, Certification for Performance-Based Reimbursement

Certification for Performance-Based Reimbursement Checklist Card

Last updated July 22, 2013

Located on SquareMeals.org

To prepare documentation for submission for meal pattern certification for new CEs and CEs that have had their performance-based reimbursement suspended.

- Use this checklist card or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Additional Information: Section 2, Application and Agreement; Section 2C, Certification for Performance-Based Reimbursement

CE Resource Checklist, Preparing for Certification for Performance-Based Reimbursement

Last updated July 22, 2013

Located on SquareMeals.org

To prepare documentation for submission for meal pattern certification for new CEs and CEs that have had their performance-based reimbursement suspended.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Additional Information: Section 2, Application and Agreement; Section 2C, Certification for Performance-Based Reimbursement

Certification Menu Worksheets

Provided by TDA staff

To apply for certification of meal pattern compliance in order to receive performance-based reimbursement if new CE or if performance-based reimbursement suspended.

- Use this form or an alternate method that provides the same information.
- Submit in TX-UNPS | Application Packet as directed by TDA staff.

Additional Information: Section 2C, Certification for Performance-Based Reimbursement; Section 7, Counting and Claiming; Section 8, Breakfast; Section 9, Lunch; Section 11, Pre-Kindergarten (Pre-K) Meal Pattern

Meal Pricing

Adult Meal Calculator Worksheet

Last updated April 23, 2020

Located on Squaremeals.org

To calculate the price of adult meals each year.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 15, Meal Pricing

Not Available, Paid Lunch Equity Exemption Form

Last updated April 4, 2017

Not available for School Year 2018-2019

To request an exemption from the paid lunch equity (PLE) requirement.

- Must use this form.
- Submit to TDA described in form directions.
- Must have approved exemption prior to implementation.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 15, Meal Pricing

Not Available, Paid Lunch Equity Exemption, Suggested Improvement Strategies

Last updated April 4, 2017

Not available for School Year 2018-2019

To provide additional information to CEs completing a Paid Lunch Equity Exemption.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 15, Meal Pricing

Paid Lunch Equity Tool (PLE Calculator)

Last updated May 20, 2020

Located on SquareMeals.org

To determine if the price of student meals meets the paid lunch equity (PLE) requirements and if an increase in pricing is required.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 14, Financial Information Concerning School Nutrition Funds; Section 15, Meal Pricing

Meal Service

Lunch Mealtime Flexibility

Last updated September 9, 2018

Located in TX-UNPS | Applications | Download Forms (SNP-000)

To submit a request to operate lunch meal service outside of the required mealtimes.

- Must use this form.
- Submit to TDA as described in the form directions.
- Must receive approval before implementing this flexibility.

Additional Information: Section 19, Breakfast

Professional Standards

Professional Standards Tracking Sheet

Last updated April 21, 2017

Located on SquareMeals.org

To maintain documentation about staff continuing education and training.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 25, Professional Standards

Hiring Professional Standards Exemption Request for Contracting Entities (CE) With a Total Student Enrollment of 2,499 or Less

Last updated April 26, 2019

Located in TX-UNPS | Applications | Download Forms (SNP-000)

To request approval to hire a specific individual to serve as the program direct who does not meet the professional standards for CEs with a total enrollment of less than 500.

- Must use this form.
- Submit to TDA as described in the form directions.
- Must have approved exemption prior to hiring the program director.

Additional Information: Section 25, Professional Standards

Hiring Program Director Checklist

Last updated May 18, 2015

Located on SquareMeals.org

To assess if the candidate for program direct meets the hiring professional standards.

- Use this form or an alternate method that provides the same information.
- Retain onsite.

Additional Information: Section 25, Professional Standards

Program Application

Application for Texas Identification Number, (AP-152)

Located in TX-UNPS | Applications | Download Forms (SNP-002) and on SquareMeals.org

To register with the state of Texas to receive reimbursement if new program operator.

- Must use this form.
- Submit form in TX-UNPS | Applications.

Additional Information: Section 2, Application and Agreement

Application/Application Renewal and Support Documentation—School Nutrition Programs (SNP)

Located TX-UNPS | Applications and TX-UNPS | Applications | Download Forms

To apply or renew in TX-UNPS | Application Screen an application to operate an SNP.

- Must use this form.

Afterschool Care Program (ASCP)

- Submit before July 1.

Community Eligibility Provision (CEP)

- Submit before July 1.

National School Lunch Program (NSLP) & School Breakfast Program (SBP)

- Submit before July 1.

Seamless Summer Operation (SSO)

- Submit before May 31.

Additional Information: Section 2, Application and Agreement; Section 5, Special Provision Options; Section 10, Afterschool Meal Programs; Section 12, Seamless Summer Option

Certification Regarding Federal Lobbying (H2048)

Located in TX-UNPS | Applications | Download Forms (SNP-001) and on Squaremeals.org

To certify that a contractor is in compliance with the anti-lobbying regulations.

- Use this form or an alternate form or method with the same information.
- Retain onsite.

Additional Information: Section 17, Procurement

Certificate of Authority (COA) for External Users, (FND-101)

Last updated August 21, 2018

Located TX-UNPS | Applications | Download Forms (SNP-015) and on Squaremeals.org

To submit the name(s) of the CE's authorized representative/s (ARs) with initial program application or when there are staff changes.

- Must use this form or the [Security Authority for Users Access Manager \(FND-135\)](#).
- Submit new form when staff changes are made as described in the form directions.
- Submit to TDA as described in the form directions.

Additional Information: Section 2, Application and Agreement

Security Authority for Users Access Manager (FND-135)

Last updated November 19, 2019

Located TX-UNPS | Applications | Download Forms (SNP-135) and on Squaremeals.org

To submit the name(s) of the CE's authorized representative/s (ARs) with initial program application or when there are staff changes.

- Must use this form or the [Certificate of Authority \(COA\) for External Users \(FND-101\)](#).
- Submit new form when staff changes are made as described in the form directions.
- Submit to TDA as described in the form directions.

Additional Information: Section 2, Program Application & Agreement

Child Nutrition Programs Waiver Request

Located on Squaremeals.org

To submit a request to waive certain program requirements for NSLP, SBP, SFSP, SMP, and FFVP.

- Must use this form.
- Submit to TDA as described in the form directions.
- Must receive approval before implementing this waiver.

Additional Information: Section 2, Application and Agreement or other sections relevant to the topic for the waiver request

Direct Deposit Authorization (74-176)

Located in TX-UNPS | Applications | Download Forms (SNP-001) and on Squaremeals.org

To submit a request for a direct deposit of funds (1) if new program operator or (2) if CE changes banks.

- Must use this form.
- Submit in TX-UNPS | Applications if new program operator.

Additional Information: Section 2, Application and Agreement

Extended/Expanded Learning Time—Afterschool Programs for NSLP & CACFP Form

Last updated January 11, 2019

Located on SquareMeals.org

To assist CEs in determining if a site is eligible to offer a snack or meal before the end of the school day and to submit a request for approval to offer a snack or meal before the end of the school day.

- Must use this form.
- Submit by email when the site application is submitted.

Additional Information: Section 10, Afterschool Meal Programs

Food and Nutrition Division Permanent Agreement Amendment Contracting Entity Specific Amendment

Last updated June 17, 2014

Located in TX-UNPS | Applications | Download Forms (SNP-005) and on SquareMeals.org

To submit a modification to the terms and conditions of the Permanent Agreement, including, but not limited to, adding a program or deleting program participation.

- Must use this form.
- Submit to TDA as needed.

Additional Information: Section 2, Application and Agreement

Food and Nutrition Division Permanent Agreement Amendment Contracting Entity Specific Amendment, Name Change

Last updated March 13, 2012

Located in TX-UNPS | Applications | Download Forms (SNP-018) and on SquareMeals.org

To submit a modification in name to be applied to the permanent agreement.

- Must use this form.
- Submit to TDA as needed.

Additional Information: Section 2, Application and Agreement

Payee Change Request (74-157)

Located in TX-UNPS | Applications | Download Forms (SNP-017) and on SquareMeals.org

To update CE payment information or report errors in CE payment information.

- Must use this form.
- Submit in TX-UNPS | Applications if new program operator or when there is change.
- Submit an updated form if payee information changes.

Additional Information: Section 2, Application and Agreement

Texas Department of Agriculture Food and Nutrition Division Permanent Agreement (Permanent Agreement)

Last updated March 2009

Located in TX-UNPS | Applications | Download Forms (SNP-004) and on SquareMeals.org

To establish a legally binding agreement for CE to operate a child nutrition program and define the roles and responsibilities of TDA and the CE in administering a school nutrition program (SNP).

- Must use this form.
- Submit to TDA.

Additional Information: Section 2, Application and Agreement

Universal Breakfast Waiver

Last updated February 2, 2018

Located in TX-UNPS | Applications | Download Forms (SNP-100)

To submit a request to waive the requirement to offer universal free breakfast.

- **Must use this form.**
- **Submit to TDA as described in the form directions.**
- **Must receive approval before implementing this waiver.**

Additional Information: Section 8, Breakfast

USDA Foods Agreement Between Contracting Entity and Texas Department of Agriculture

Last updated January 2017

Located in TX-UNPS | Applications | Download Forms (SNP-014) and on SquareMeals.org

To request participation in the USDA Foods program.

- **Must use this form.**
- **Submit in TX-UNPS | Application Screen (1) if new program operator or (2) when initiating the option to receive USDA Foods.**

Additional Information: Section 2, Application and Agreement; Section 21, USDA Foods

**Contact Information for the
Texas Department of Agriculture (TDA), Food and Nutrition**

When contacting TDA by phone, Contracting Entities (CEs) need to have their CE Identification Number (CE ID) (and site ID, if applicable). CEs should include their name and CE ID (and the site name and ID if applicable) in all communication or documentation.

General Contact Information

Physical Address		Mailing Address	
1700 N. Congress, 11th Floor, Austin, TX 78701		PO Box 12847, Austin, TX 78711-2847	
Phone	877-TEX-MEAL, (877) 839 -6325	Email Contact	SquareMeals@TexasAgriculture.gov
Fax	(888) 203-6593	Website	www.SquareMeals.org

Questions about Program Applications

Child & Adult Care Food Program

CACFP.BOps@TexasAgriculture.gov

National School Lunch Program, School Breakfast Program, & Special Milk Program

NSLP-SBP.BOps@TexasAgriculture.gov

Seamless Summer Option

SSO.BOps@TexasAgriculture.gov

Summer Food Service Program

SFSP.BOps@TexasAgriculture.gov

Questions about Program Flexibility

SNPWaivers@TexasAgriculture.gov for questions about

- Breakfast Waiver
- Child Nutrition Program Requirement Waivers
- Gender Exception
- Hiring Standards, CEs with Less Than 500 Students
- Lunch Mealtime
- Paid Lunch Equity (not currently available)
- RCCI Age/Grade Group Meal Pattern
- Seamless Summer Operation (SSO) Age/Grade
- Summer Mandate
- Technology-Based Confirmation
- Universal Breakfast Mandate
- Vending Machine to Dispense Reimbursable Meals

Nutrition@TexasAgriculture.gov for questions about

- Milk Substitute Notification

Questions about Program Operation

USDA Foods Operations

CommodityOperations@TexasAgriculture.gov

Community Operations (Child & Adult Care Food Program & Summer Food Service Program)

Community.Ops@TexasAgriculture.gov

School Operations (National School Lunch Program, School Breakfast Program, & Special Milk Program)

School.Operations@TexasAgriculture.gov

Texas Eligibility List Management System (Texas ELMS)

DirectCertification@TexasAgriculture.gov

Farm Fresh Initiative (Local Products)

FarmFresh@TexasAgriculture.gov

Questions about Financial Issues

Capital Expenditures

NSLP-SBP.BOps@TexasAgriculture.gov

Claims

BCT.BOps@TexasAgriculture.gov

Procurement, Including Sole Source

CE.ProcurementReviews.BOps@TexasAgriculture.gov

Excessive Balance Plan

School.Operations@TexasAgriculture.gov

Questions about USDA Foods

USDA Foods Carryover Inventory

CommodityOperations@TexasAgriculture.gov

USDA Foods Transfer

CommodityOperations@TexasAgriculture.gov

April 24, 2020