**North Carolina Department of Public Instruction**

**School Nutrition Services Section**

**Documenting Transported (Catered) Meals**

**Revised July 2015**

The Transported Meal Production Record is a required record for the National School Lunch and School Breakfast Programs. There are separate production records for Breakfast and Lunch due to the different meal components in the breakfast and lunch meal patterns. The information is to be recorded daily and kept in the school’s food service area. The production record is a management tool that will provide information for planning, producing and serving daily school meals. It is a legal document used to determine nutritional adequacy, assess food safety practices and support the claim for reimbursable meals. All completed production records are to be kept on file for 3 years plus the current school year.

At minimum, the following information must be recorded on official documents (i.e. production records, delivery tickets, HACCP plans) which remain on file for 3 years plus the current year:

* The documentation must include the following menu planning information for the catered site (separate from the meals served at the production kitchen): total planned student meals; quantity of planned meal components for menu planning; quantity of food available on the day of service; number of meals served to students and adults; and a la carte portions served.
* The information recorded at the receiving site must show that students received adequate meal components or menu items to support the reimbursable meal claim.
* A complete HACCP/food safety plan must be in place both at the preparation site and the receiving site. Refer to the Transported/Catered HACCP templates at: <http://childnutrition.ncpublicschools.gov/information-resources/haccp-food-safety/transported-meals-catered>
* All forms other than the DPI prototype forms must be approved in writing by the State Agency prior to use.

**When to use Transported Meal Production Record and Meal Delivery Ticket**

Depending on the operation, there are two tools that can be used to document reimbursable meals at sites receiving transported reimbursable meals: the Transported Meal Production Record and Meal Delivery Ticket. The Transported Meal Production Record provides documentation for reimbursable meals served at a facility with limited on-site food preparation facilities and where meals are brought in (catered or transported) from an outside production site. The Delivery Ticket is designed to be used by the production kitchen to document the food prepared and delivered to the serving site.

Discuss the options with your School Nutrition Consultant to determine which works best for your operation. Ultimately the School Food Authority (SFA) is responsible for assuring that production records are completed; however, the catering contract may include language that also defines the caterer’s responsibility. Although each situation is unique, below are two options often used for recording meal service and production for SFAs receiving transported meals.

**When A School Receives Catered Reimbursable Meals from a Vendor:**

1. The Transported Meal Production Record, when used alone, may be partially pre-filled by the SFA or the caterer; it is important that the SFA and caterer work together to determine who is responsible for documentation with both parties agreeing on the procedure to use. If the production records starts with the caterer, it may travel daily with the food from the catering operation to the school, where final information is recorded on the day of service. In this case, the caterer records the Menu in section (1) and Food Items in (6), contribution to the meal pattern in column (7), the portion size in column (8), the number of portions ordered (9a) and the amount of bulk food provided in column (9b) in units of pounds, # 10 cans or “each” for each menu item. At the school, the Transported Production Record would be completed by the School Nutrition administrator, starting with Section 1: Time and Temperature of delivery. The SFA would record the number of portions received (9c) and the number of portions served to students(10a), adults (10b) and a la carte portions served (10c). The SFA would record the number of portions leftover (11a) and *their temperature or the time that meal service ended* and leftovers were discarded (11b). The Transported Meal Production Record would need to be signed by the SN administrator and caterer and filed daily by the SFA. **NOTE: Manually add a line for the second signature if this method is chosen.** It is recommended that the caterer keep a copy of the completed production record for his/her records.
2. If using the Transported Meal Production Record **and** the Meal Delivery Ticket, the SFA will be responsible for ensuring all necessary documentation is captured on either the Transported Production Record or the Meal Delivery Ticket. The caterer will complete the Meal Delivery Ticket and the SFA will complete the remaining required documentation on the Transported Production Record. (Refer to the Transported/catered Production Record and Meal Delivery Ticket documents at <http://childnutrition.ncpublicschools.gov/information-resources/menu-planning-production/meal-production-records>). Sections of the production record that can be pre-filled ahead of the day of service include section 2 School Name, 3 Planned Reimbursable Meals, column 6 Food Items, and column 9a Number of Portions Ordered. Upon delivery of the food, record the *Time and Temperature of foods that are time-temperature controlled for safety (TCS)* in section 1 and the number of portions received in 9c. After meal service, record the number of portions served to students (10a) and adults (10b), a la carte portions served (10c) and leftover information (11a and 11b). The caterer will complete the Meal Delivery Ticket documenting the \*Menu, \*Meal Pattern Contribution, \*Portion size, \*Quantity of food prepared in units of pounds, #10 cans (or other can size as appropriate) or “each”. The caterer will *record time* *of preparation of the food and temperature for TCS foods, time of delivery and temperature of food* *upon delivery*. Information from the Meal Delivery Ticket can be transferred to the Transported Meal Production Record; however, it is recommended that the Meal Delivery Ticket be stapled to the Transported Meal Production Record daily to avoid duplication. The Delivery Ticket should accompany the meal, be signed by the caterer and the SN administrator and be attached to the Transported Meal Production Record and filed by the SFA. The caterer should keep a copy of the Meal Delivery Ticket for his/her records.

**When a School Caters Meals to another School or another Site:**

When a school’s central kitchen or nearby school site is catering to another site where meals are claimed for reimbursement, both the Daily Meal Production Record (note: this is the production record used at the production kitchen) **and** Transported Meal Production Plan can be used to document reimbursable meals for proper claiming. If meals are claimed at the catered site (i.e. Early College), then a Transported Meal Production Record should be completed daily for that site. If the school is catering a non-school site (i.e. day care facility that is paying the SFA for the meals) where meals are not claimed for reimbursement by the School Nutrition Program, then the Daily Meal Production Record at the production kitchen along with the Meal Delivery Ticket furnished to the site would be sufficient.

The manager/employees would record information about the catered food provided to both types of locations mentioned in the previous two paragraphs on the Daily Meal Production Record used at the production kitchen in this manner:

* Column 11(c): Include the number of servings planned to offer at the catered site in the Total Servings Planned to Offer
* Column (15): Include the number of servings of each menu item that were served at the catered site as Non-reimbursable servings at the production kitchen
* Section (4): Record the number of Catered Meals for that day.

Recording the information above correctly will ensure that both the production kitchen and catered sites have sufficient information to document that reimbursable meals were provided and the reimbursement claim may be sufficiently supported.

**North Carolina Department of Public Instruction**

**School Nutrition Services Section**

**Instructions for Completing NC Daily Transported Meals Production Record**

**Revised April 2015**

**Completing the Transported Meals Production Record:**

* **NOTE:** All items required as part of your HACCP Plan *are printed in italics in these instructions and must be completed daily*.

1. **MENU** -- Enter menu planned for the day. Record any substitutions made in the planned menu also*. The following information must be completed for menu items that are time- temperature controlled for safety (TCS). The temperature of all TCS foods will be checked using a calibrated thermometer upon receipt of the catered foods at the serving site and recorded along with the time of the delivery. If meals are individually pre-plated, select representative meal(s), measure and record the temperature of each time-temperature controlled for safety (TCS) food along with the time of the delivery.*

***Time of delivery*** *– Record the time the food was received from the food production site at the serving site.*

***Temperature upon receipt*** *– Upon receipt of the food at the serving site, check the actual product temperature of the food with a properly calibrated thermometer. Measure the temperature of the food before the food is offered to students. If a cold food is not at 41˚F or colder and hot food is not at 135˚ F or hotter it should* ***not*** *be accepted from the food production site or served. The time and temperatures recorded in this column should be recorded for all time-temperature controlled for safety foods (TCS) accepted and served to students.*

1. **School, Manager, and Date**

Enter name of the school, manager signature, and date of meal service. The signature indicates that the manager or person in charge has fully reviewed the meal planning, production and service and is satisfied with the accuracy of the information. If the caterer is completing any section(s) of the record, add a line for the caterer to sign daily as well.

1. **Total Number of Planned Reimbursable Student Meals**

Record the total number of student meals planned at the time you complete column 9a and prior to ordering food. The amounts of food planned for student reimbursable meals must be consistent with the number of reimbursable meals planned in section 3. For example, if you are planning 335 reimbursable student meals, you cannot plan more than this number of total entrees or milks; likewise, you could not plan more than 670 servings of vegetables and fruits if students are only allowed to take two servings. You may plan less than these amounts if students participate in offer vs. serve and often decline some menu items.

1. **Number of Students Served**

After meal service, record the total number of students served, indicating the meal pattern used such as K-5, 6-8. K-8 or 9-12. Indicate the number of CN (Child Nutrition) meals served (if any), Other Adult Meals purchased, adding all columns to determine the Total Meals served. Check if students participate in Offer vs Serve and indicate grade levels implementing Offer vs Serve. Check that water is available at meal service.

1. ***Personnel*** *– These five items support your daily HACCP Plan. Each should be checked if in place. Note any corrective action taken if you were unable to check that all were in place.*

***Healthy*** *– Are all employees who are handling and serving foods healthy? If an individual is sick, she/he should not be handling exposed food, single-use articles, cleaned and sanitized dishware and equipment, and clean linens.*

***Clean Appearance*** *– Are employees properly dressed according to the food safety standards outlined in 2-4: Prerequisite Programs?*

***Washing hands*** *– Are employees properly washing their hands with warm water, soap, and drying?*

***No Bare Hand Contact*** *– Employees should not be handling cooked or ready-to-eat foods with their bare hands. They should use tongs, utensils, deli tissue, or single-use* *gloves.*

***Thermometers checked and calibrated if needed*** *-- Thermocouples do not require calibration; if using one, make a notation of N/A.*

1. **Food Items**

From the menu items written in Section 1, list by meal component, the foods to be served. Meal components are different for breakfast and lunch, requiring the use of different production records for each meal. Lunch components include Meats, Grains, Fruits, Vegetables and Milk. Breakfast components include Grains, Grain Substitute or Other, Fruits, and Milk. There is no requirement to offer Meat/Meat Alternate (m/ma); however, m/ma may be included in the breakfast menu in one of two ways: 1) as a Grain Substitute once the minimum daily grain requirement is met, contributing to the weekly total OR 2) as an “Other” food that does not credit toward any component.

Include descriptive information about each product to assure an accurate nutrient analysis. For example: reduced fat, fat-free, diced, sliced, fresh, frozen, identify whole wheat products as WW and whole grain products as WG. Specify the various milk choices the same way that you list any other menu item. *Milk cannot be “recycled”; once it leaves the line on a student’s tray it cannot be returned for service to others. The milk might become contaminated while on the student’s tray and so could potentially become a source of illness for the student to whom the milk is re-serve*d.

**Menu Substitutions:** Items added on the day of service would be considered a menu substitution since the original planned amounts would be adjusted to accommodate this last minute addition. If any menu items are substituted on the day of meal service, draw a line through the menu item that will not be served and list the substituted menu item in this section; complete columns 7-12 for the menu substitution.

1. **Meal Pattern Contribution**

Enter the amount of meal pattern contribution for each menu item using the units provided. (i.e. 2 oz. meat/meat alternate, 1 ounce equivalent of grain, ½ c. fruit, ½ cup vegetable, 1 cup milk). Remember that the Meal Pattern Contribution may be different than the actual weight or measure of the Portion Size (for example, 5 chicken nuggets may contribute 2 oz. of meat/meat alternate to the food based meal pattern but their total weight may be more than 2 oz. The actual portion size listed in column 8 would be 5 nuggets)

1. **Portion Size**

Enter the actual portion size of each menu item. (portion size is the amount of food served on the tray/plate). The portion size must be in “measurable” units such as each, cup, ounce, etc. Verify the Portion Size by measuring or weighing the menu item; if the Portion Size is inadequate, contact your caterer.

1. **Meal Receiving Information**
2. **Number of portions ordered**- Enter the number of portions (servings) ordered for each menu item.
3. **Quantity provided by Vendor in pounds, #10 cans, or each**- The caterer must provide the bulk quantity of the amounts of each menu item prepared and delivered for the meal. For example, 5 #10 cans of peas, 30 lb of ground beef for spaghetti, 15 lb of carrots sticks, 150 each chicken patties. Recording number of servings or portions is not sufficient to show that the amount of food was adequate for the meal pattern requirements.
4. **Number of portions received**- Enter the number of portions (servings) received from the caterer for each menu item.
5. **Meal Offering Information**
6. **No. portions Served to Students (Reimbursable)**- Record the number of portions (servings) served to students as part of reimbursable meals.
7. **No. portions Served to Adults (Non-reimbursable)**-Record the number of portions (servings) of each menu item served for adult-priced meals or served to adults, including CN employees.
8. **A la Carte Portions Served**- Enter the number of servings of each menu item that were sold that were not part of a complete reimbursable meal. This information is recorded only if your organization sells servings of foods to adults or students that are not part of a reimbursable meal. An example of this would include a student buying an extra piece of pizza or a carton of milk or a teacher purchasing an entree.
9. **Leftovers**
10. **Number of Portions of Leftovers**- Enter actual portions of each menu/food item left after all meals have been served, regardless of preserving or discarding the food*. All leftover TCS foods must be discarded at the end of meal service. No catered foods can be saved for service at a later time.* *Exception: individually packaged, unused non-TCS foods (i.e. pop tarts, cereal bars, muffins, individually sealed pre-cupped canned fruits, individually packaged 100% fruit juice, etc.) and unserved cartons of milk that have been temperature controlled, will be safely monitored and maintained at proper temperature, and are deemed safe to be used the following day.*
11. **Time of Discard or Product Temperature**- *All Time-Temperature Controlled for Safety (TCS) foods must be held for service at safe and appropriate temperatures. It is expected that catered food will be held in appropriate methods to maintain safe temperatures prior to service and that food temperatures are regularly checked with a properly calibrated thermometer. Catered food should never be allowed to be held for service longer than 4 hours. At the end of meal service, record in this column either:*
12. *The time meal service ends if all food items are to be discarded or*
13. *The temperature of each TCS menu item, prior to discarding the food. If any menu items, such as unserved temperature controlled cartons of milk, are routinely saved for re-service, the temperature of the food must be recorded in column (11b) at the end of the meal.*
14. **Directions, Comments, Recipe Numbers or Corrective Actions Taken**

Write in special directions, food preparation and serving notes, comments, recipe numbers or recipe information, leftovers (individually packaged items only) or other information relative to the menu production for the day’s menu or notes for another day.