COUNTING, CLAIMING & CONSOLIDATION

STUDENT SUCCESS AND WELLNESS BUREAU

OVERVIEW OF TODAY'S PRESENTATION:

Healthy Universal School Meals Law Impact

Meal Counting (at Time of Meal Service)

Reconciling / Edit Checks to Prepare to Submit Monthly Claim

Submitting Monthly Claim

Verifying Submissions of Monthly Claims

COMMONLY USED ACRONYMS

- **ADA:** AVERAGE DAILY ATTENDANCE
- **ADP:** AVERAGE DAILY PARTICIPATION
- **AR:** ADMINISTRATIVE REVIEW
- **ASSP:** AFTER SCHOOL SNACK PROGRAM
- **CACFP** CHILD ADULT CARE FOOD PROGRAM
- **CAP:** CORRECTIVE ACTION PLAN
- **CEP:** COMMUNITY ELIGBILITY PROVISION
- **CN:** CHILD NUTRITION
- **CAN:** CHILD NUTRITION ACT
- **CNP:** CHILD NUTRITION PROGRAM
- **COB:** CLOSE OF BUSINESS
- **ECEDC:** EARLY CHILDHOOD EDUCATION AND CARE DEPARTMENT
- **FFVP:** FRESH FRUIT AND VEGABLE PROGRAM
- **FNS:** FOOD AND NUTRITION SERVICE
- **FP:** FOOD PROGRAM
- **FSMC:** FOOD SERVICE MANAGEMENT COMPANY
- **HSD:** HUMAN SERVICES DEPARTMENT
- **IEG:** INCOME ELIGIBILITY GUIDELINES
- **LEA:** LOCAL EDUCATION AGENCY (This is a term used by the USDA, we call you SFA)
- **NSLA:** NATIONAL SCHOOL LUNCH ACT
- **NSLP:** NATIONAL SCHOOLLUNCH PROGRAM
- **SA:** STATE AGENCY
- **SBP:** SCHOOL BREAKFAST PROGRAM
- **SF:** SUMMER FOOD
- **SNAP:** SPECIAL NUTRITION ASISTANCE PROGRAM
- **SSO:** SEAMLESS SUMMER OPTION
- **SSWB:** STUDENT SUCCESS AND WELLNESS BUREAU
- **SVP:** SEVERE NEED BREAKFAST
- **TA:** TECHNICAL ASSISTANCE

TERMS AND DEFINITIONS:

OVERT IDENTIFICATION: Eligibility information must never be publicized or used in such a way that other students may recognize students' eligibility categories. Students receiving free or reduced-price benefits must not, at any time, be treated differently from students who do not receive these benefits. School Food Authorities (SFAs) are required to ensure that there is no physical segregation, discrimination, or overt identification of any student eligible free or reduced-price benefits.

REIMBURSABLE MEALS: All meals served in the National School Lunch and School Breakfast Programs and counted for reimbursement must meet the meal pattern requirements specified in the program regulations and be served to eligible students. For further information concerning reimbursable meals and Offer Versus Serve refer to the Breakfast At a Glance and Lunch At a Glance and the Offer Versus Serve Manual.

Claim for reimbursement: School meal counts, by category, are submitted to the SFA on a daily, weekly, or monthly basis. The counts from each site are combined to generate the sponsor monthly claim for reimbursement.

Internal Controls: An SFA must establish internal controls to ensure that an accurate claim for reimbursement has been made. Edit checks and On-site monitoring forms are examples of internal controls.

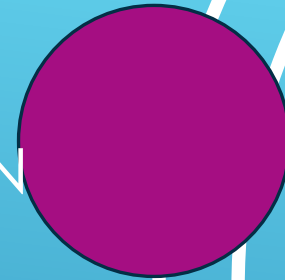# HEALTHY UNIVERSAL SCHOOL MEALS (HUSM)
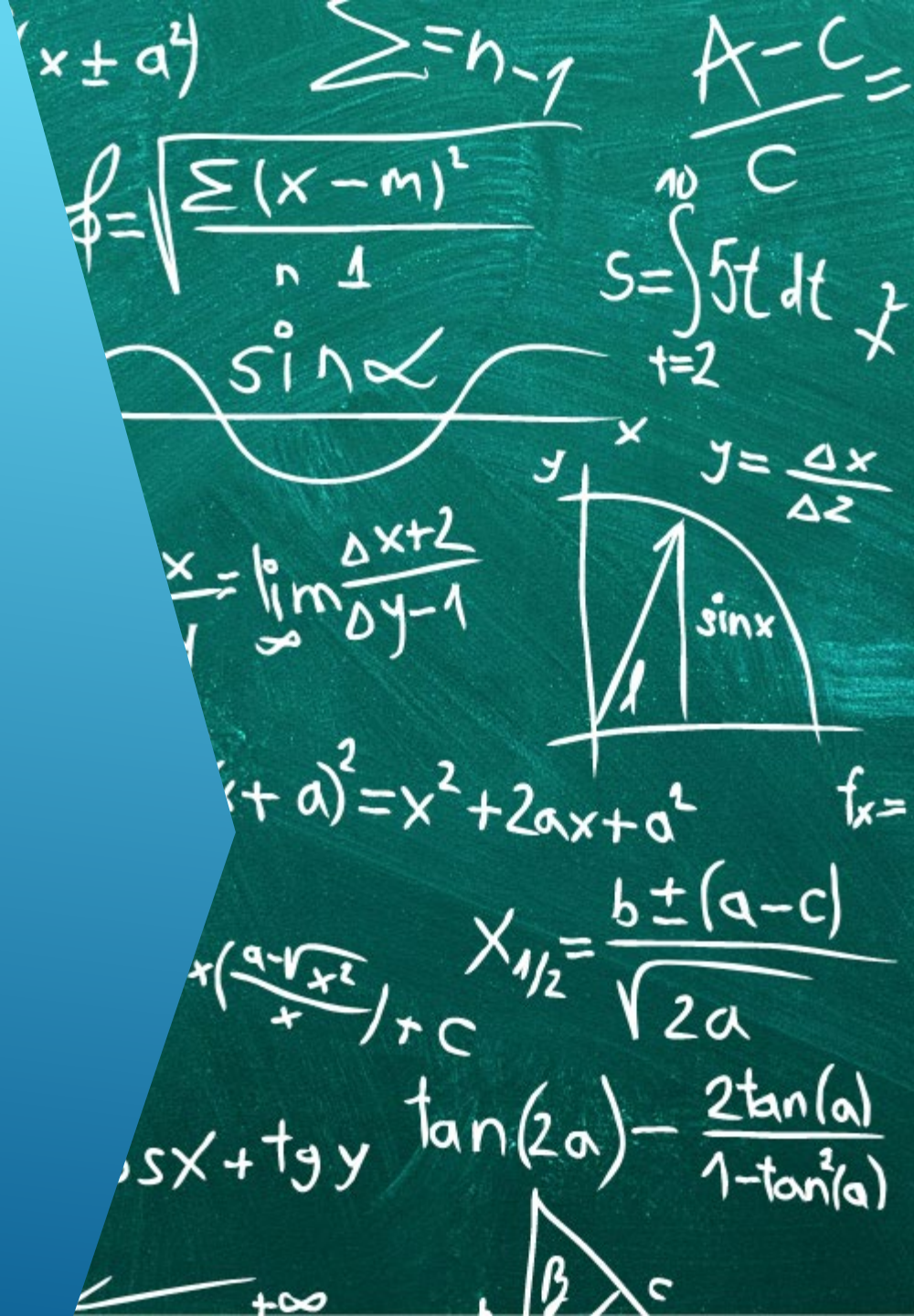
WHAT ARE THE DIFFERNCES/SIMILARITIES BETWEEN SBP, NSLP OPERATED WITH OR WITHOUT HUSM (HEALTHY UNIVERSAL SCHOOL MEALS)?

HOW DO THESE DIFFERNCES VARY BY CLASSIFICATION OF A CEP OR STANDARD SCHOOL (OR A COMBO OF BOTH)?

PLEASE SEE THE COMPARISON CHART BELOW FOR CLARIFICATION

OPERATIONAL DIFFERNCES

	SBP/NSLP before Healthy Universal School Meals (HUSM) & Private, Bureau of Indian Education, and Tribally Controlled Schools only	SBP/NSLP with HUSM Standard Schools	SBP/NSLP with HUSM (Community Eligibility Provision schools)
Allowable Meals	Breakfast and lunch option to serve both or just one	Must serve both breakfast and lunch	Must serve both breakfast and lunch
School Food Authority (SFA) Eligibility	Approved New Mexico public or private/non-public school district, charter school food authority or Residential Care Institution that participate in SBP or NSLP. Online schools and students not attending a participating in SBP/NSLP schools do not qualify for meals.	Approved New Mexico public school district or charter school food authority that participate in the SBP and NSLP. Online schools and students not attending a participating in SBP/NSLP schools do not qualify for meals.	Approved New Mexico public school district or charter school food authority that participates in the SBP and NSLP. Online schools and students not attending participating in SBP/NSLP schools do not qualify for meals.
Free & Reduced-Price Meal Applications	Must collect and process applications as a part of normal operations. Must follow disclosure requirements, complete verification and direct certification. May use a student's eligibility status from the prior school year for the first 30 days of the new school year (i.e., carryover).	Must collect and process applications as a part of normal operations for Standard Schools. May use a student's eligibility status from the prior school year for the first 30 days of the new school year (i.e., carryover).	Applications are not collected. A SFA with a combination of Standard and CEP schools will need to collect applications for Standard schools only. Must follow disclosure requirements and complete direct certification.

Website Hyperlinks for quick access:

Federal Reimbursement rates:
https://www.fns.usda.gov/cn/rates-reimbursement

Meal Claiming:
https://webnew.ped.state.nm.us/bureaus/student-success-wellness/student-success-wellness-data/

Paid Lunch Equity (PLE) Tool:
https://www.fns.usda.gov/cn/paid-lunch-equity-guidance-sy-2023-24

	SBP/NSLP before Healthy Universal School Meals (HUSM) & Private, Bureau of Indian Education, and Tribally Controlled Schools only	SBP/NSLP with HUSM Standard Schools	SBP/NSLP with HUSM (Community Eligibility Provision schools)
Federal Reimbursement Rates	Federal reimbursement rates are updated by the USDA each July. SFAs will receive federal reimbursement based on the number of free, reduced-priced and paid meals claimed.	Federal reimbursement rates are updated by the USDA each July. SFAs will receive federal reimbursement based on the number of free, reduced-priced and paid meals claimed. *In addition, SFAs will receive state reimbursement based on the number paid meals claimed (the difference between the federal paid and free rates).*	Federal reimbursement rates are updated by the USDA each July. SFAs will receive federal reimbursement based on the number of free claiming rate established based on the Identified Student Percentage (ISP). *In addition, SFAs will receive state reimbursement based on the number paid meals claimed (the difference between the federal paid and free rates).*
Meal Claiming	Claim meals by student eligibility (free, reduced-price or paid) in the NMPED Student Nutrition Portal.	Claim meals by student eligibility (free, reduced-price or paid) in the NMPED Student Nutrition Portal.	Claim the total number of meals served each day in the NMPED Nutrition Portal.
Paid Lunch Equity (PLE) Tool	Schools that charge paid students for meals are required to assess their student paid prices annually. If a sponsor has a negative fund balance, they must complete the PLE tool and increase the price of paid lunches based on tool outcome, if applicable.	HUSM SFAs (i.e., have non-pricing schools) or excess cash, are exempt from completing the PLE tool.	HUSM SFAs (i.e., have non-pricing schools) or excess cash, are exempt from completing the PLE tool.
Nonprogram Revenue (NPR) Tool	School Food Authorities are required to determine if the revenue from the nonprogram foods (a la carte, second meals, adult meals, catering, etc.) generates at least the same proportion of revenue as they contribute to the SFA's food cost.		
Unpaid Meal Charges	SFAs must have an unpaid meal charge policy in place and must communicate the policy to all families.	SFAs must follow their unpaid meal charge policy for balances accrued prior to the start of HUSM. Once in HUSM, unpaid meal charges will no longer accrue. It is not recommended to allow students to	SFAs must follow their unpaid meal charge policy for balances accrued prior to the start of Kids Kitchen. Once in HUSM, unpaid meal charges will no longer accrue. It is not recommended to allow students to

Website Hyperlinks for quick access:

Offer Vs Serve:
https://www.fns.usda.gov/tn/offer-versus-serve-national-school-lunch-program-posters

	SBP/NSLP before Healthy Universal School Meals (HUSM) & Private, Bureau of Indian Education, and Tribally Controlled Schools only	SBP/NSLP with HUSM Standard Schools	SBP/NSLP with HUSM (Community Eligibility Provision schools)
		charge for a la carte items. SFAs are not required to have an unpaid meal charge policy under HUSM.	charge for a la carte items. SFAs are not required to have an unpaid meal charge policy under HUSM.
Excess Net Cash	If the nonprofit school food service account has a net cash balance exceeding more than three months average expenditures, a spending plan of how the excess cash funds are being invested back into the school meal programs must be submitted to the NMPED for approval.		
Meal Patterns	School Food Authorities must follow SBP and NSLP meal pattern requirements and must plan all menus to meet the grade group requirements for the grade groups served at each site. Offer vs Serve is required for lunch at the high school level, optional (but recommended) at lower levels and at breakfast. The Pre-K meal pattern must be followed for Pre-K students when they eat meals separately from older students.		
Special Dietary Needs	SFAs are required to accommodate special dietary needs when due to a disability and supported with a medical statement. Such accommodations may fall outside of the meal pattern requirements and those meals may still be claimed for reimbursement. SFAs may choose to make accommodations for dietary preferences, but all accommodations must meet meal pattern requirements in order for the meal to be claimed for reimbursement. All SFAs must inform households of their ability to provide reasonable meal accommodations for students with disabilities.	Same	Same In addition, SFAs using tally sheets in place of an electronic point of service are encouraged to develop methods to alert staff of students with special dietary needs in the serving line.

Website Hyperlinks for quick access:

Student Nutrition Portal:
https://sns.ped.state.nm.us/Application/Login.aspx?ReturnUrl=%2fApplication%2f

	SBP/NSLP before Healthy Universal School Meals (HUSM) & Private, Bureau of Indian Education, and Tribally Controlled Schools only	SBP/NSLP with HUSM Standard Schools	SBP/NSLP with HUSM (Community Eligibility Provision schools)
Smart Snacks, Competitive Foods & Healthy Beverage Policy	All foods sold on school property during the school day are required to meet Smart Snack Standards and the Healthy Beverage and Competitive Food Sale policies. This includes school stores, outside vending machines, etc.		
Meal Service Times	Meals must be served during a specific time frame and ensure no overlap of meal service. Breakfast must be served before 10 am and lunch between 10 am – 2 pm.	Meals must be served during a specific time frame and ensure no overlap of meal service. Breakfast must be served before 10 am and lunch between 10 am – 2 pm. Students K-5 shall be allowed to have up to 25 minutes of seated lunch time. Recess before lunch is encouraged.	Meals must be served during a specific time frame and ensure no overlap of meal service. Breakfast must be served before 10 am and lunch between 10 am – 2 pm. Students K-5 shall be allowed to have up to 25 minutes of seated lunch time. Recess before lunch is encouraged.
Meal Service Location	Meals must be served to students enrolled in a participating school and consumed on-site. To increase student access to meals, meals may be served in the cafeteria, classroom, or elsewhere (i.e. district run food trucks) on the school campus.		
Annual Program Application	SFAs apply to operate school nutrition programs through the Student Nutrition Portal. SFAs will apply annually before the start of the school year and submit site applications.	SFAs apply to operate school nutrition programs through the Student Nutrition Portal. SFAs will apply annually before the start of the school year and submit site applications. In order to receive the HUSM, state reimbursement, SFAs will select to operate both breakfast and lunch in the annual application.	SFAs apply to operate school nutrition programs through the Student Nutrition Portal. SFAs will apply annually before the start of the school year and submit site applications. In order to receive the HUSM, state reimbursement, SFAs will select to operate both breakfast and lunch in the annual application. CEP Schools will complete validations to establish free claiming percentages at the start of their four-year cycle.

Website Hyperlinks for quick access:

Civil Rights:
https://webnew.ped.state.nm.us/bureaus/student-success-wellness/civil-rights/

On-Site Monitoring:
https://webnew.ped.state.nm.us/wp-content/uploads/2018/01/National-School-Lunch-Program-On-Site-Monitoring-Form.pdf

Local Wellness Policy & Triennial Assessment:
https://webnew.ped.state.nm.us/bureaus/safe-healthy-schools/wellness-policy/

	School Meals (HUSM) & Private, Bureau of Indian Education, and Tribally Controlled Schools only	Standard Schools	(Community Eligibility Provision schools)
Civil Rights	School nutrition staff must complete annual training and follow all civil rights regulations to ensure all eligible persons receive program benefits in a non-discriminatory manner consistent with FNS Instruction 113-1.		
On-Site Monitoring	The on-site monitoring form must be completed by February 1st of each school year for SFAs with more than one site. Completion of forms must be completed on-site for each site.		
Food Safety Inspections	SFAs must request two food safety inspections from either their local health department each year and implement a food safety plan at each meal site and/or central kitchen. If only one inspection is completed, record of the request for two must be kept on file.		
Local Wellness Policy & Triennial Assessment	SFAs must have a local school wellness policy in place and the policy must undergo an assessment every 3 years, at a minimum.		
Food Service Management Companies (FSMC)	SFAs may contract with a FSMC for no longer than one year, with the options for a yearly renewal not to exceed four additional years.	SFAs may contract with a FSMC for no longer than one year, with the options for a yearly renewal not to exceed four additional years. SFAs should work with their legal counsel to determine if participating in HUSM creates material change in the scope of terms of their FSMC contract. If participation in HUSM creates a material change, SFAs will need to release a request for proposal for a new FSMC contract.	SFAs may contract with a FSMC for no longer than one year, with the options for a yearly renewal not to exceed four additional years. SFAs should work with their legal counsel to determine if participating in HUSM creates material change in the scope of terms of their FSMC contract. If participation in HUSM creates a material change, SFAs will need to release a request for proposal for a new FSMC contract.

Additional Considerations	Benefits for opting into HUSM:
	• Community Eligibility Provision schools:
	   o Promotes equity and reduces stigma of school meals
	   o Eliminates unpaid meal debt once implementing CEP
	   o Reduces administrative burden
	   o Increase in the number of students who eat breakfast and lunch each day
	   o Simplifies meal counting and claiming processes
	   o Easier implementation of alternative serving models (e.g., breakfast in the classroom, kiosks, etc.)		

HEALTHY UNIVERSAL SCHOOL MEALS: PROCEDURES TO NOTE:

- CEP Schools will continue to claim all meals under the FREE category

- Standard Schools must have students listed by eligibility (not overtly identified), to ensure they fill out the claim by the correct category; Free, Reduced or Paid. This will help you to enter numbers correctly into the claims portal. Paid meals and reduced are being subsidized by State funds, while Free are reimbursed by Federal Funds only. It is imperative to claim correctly, to ensure you receive reimbursements from the correct Agency.

- Sites participating in SB-4 must offer Breakfast and Lunch daily

- All meals will follow the correct meal pattern by grade grouping

- High Schools are required to participate in Offer vs. Serve (ovs), other grade levels are encouraged to participate

- Only 1 meal, per meal period, is eligible to be claimed by each student daily. Seconds, a la cart, non-compliant and adult meals should NEVER BE CLAIMED FOR REIMBERSMENT.

ACCOUNTABILITY: MEAL COUNTING AT STANDARD SITES

✓ To receive reimbursement, sites must accurately count, record, and claim the number of reimbursable meals actually (Counted at the Point of Sale ONLY) served to students by category: Free, Reduced and Paid. The number of meals served Free, Reduced and Paid claimed for reimbursement must have adequate documentation on file to support the claim.

✓ If tracking manually you must utilize some sort of roster that has the students name, and eligibility that is not overtly identifying.

✓ Only meals that are Reimbursable (contains all required nutritional components), may be claimed. Only one meal per student, per day may be claimed. One Breakfast and one Lunch.

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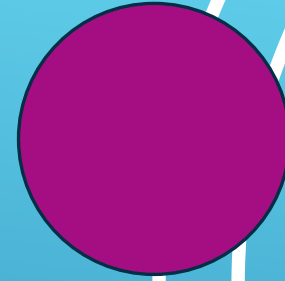
Acceptable POS meal count systems include:	Unacceptable POS meal count systems (they do not provide a daily count of reimbursable meals by category at the POS):

• Coded Roster Checklist
• Coded Tickets or Tokens: (not color coded)
• Tick or Tally Sheet
• Electronic System:
    Student ID Card
    Student PIN Code
    Student Biometric Finger ID
	☐ Attendance Counts
	• Tray/Entrée Counts
	☐ Classroom Counts
	☐ Head Counts
	☐ Counts taken anywhere other than at point of service
	☐ Cash converted to meals
	☐ Category/Cash Back-out Systems
	☐ Delivery Count of Meals Produced Off-Site
	☐ Any acceptable system that is not implemented properly

Codes on checklists, rosters or tickets are one method of preventing overt identification. A code must be difficult to recognize, but not so confusing that the person taking the count has difficulty identifying the category. Some codes are too easily recognizable and therefore allow overt identification. These include the actual words "free," "reduced-price" and "paid" or the use of the letters "F," "R" or "P." In addition, the use of different colors for different designations is also prohibited.

ACCOUNTABILITY: MEAL COUNTING AT CEP SITES

✓ Schools participating in CEP must provide access to both breakfast and lunch for all students during each school day. During meal service, schools are required to keep accurate meal counts and maintain a POS system that ensures Federal reimbursements are claimed only once for each student served a reimbursable meal (except second breakfasts as allowed in the SBP) [7 CFR 220.9(a)]. Schools may not claim reimbursement for additional meals served to students, or for meals that do not meet the meal pattern requirements

✓ If tracking manually you may utilize a Tally Sheet. This document does not need to include any student information. The Tally Sheet must only be marked at the time of service (the moment the student receives the compliant meal).

✓ Only meals that are Reimbursable (contains all required nutritional components), may be claimed. Only one meal per student, per day may be claimed. One Breakfast and one Lunch.

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EXAMPLE OF TALLY SHEET (CEP ONLY)

EXAMPLE OF ROSTER (STANDARD ONLY)
(must have student name and eligibility status not overtly identified)

DAILY MEAL COUNT FORM FOR USE IN CEP SCHOOLS

Site Name: _____ Meal Type (circle): B L

Supervisor's Name: _____ Date: _____

Meals Served to Students (cross off number as each student receives a meal)

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40	41	42	43	44	45
46	47	48	49	50	51	52	53	54	55	56	57	58	59	60
61	62	63	64	65	66	67	68	69	70	71	72	73	74	75
76	77	78	79	80	81	82	83	84	85	86	87	88	89	90
91	92	93	94	95	96	97	98	99	100	101	102	103	104	105
106	107	108	109	110	111	112	113	114	115	116	117	118	119	120
121	122	123	124	125	126	127	128	129	130	131	132	133	134	135
136	137	138	139	140	141	142	143	144	145	146	147	148	149	150
151	152	153	154	155	156	157	158	159	160	161	162	163	164	165
166	167	168	169	170	171	172	173	174	175	176	177	178	179	180
181	182	183	184	185	186	187	188	189	190	191	192	193	194	195
196	197	198	199	200	201	202	203	204	205	206	207	208	209	210
211	212	213	214	215	216	217	218	219	220	221	222	223	224	225
226	227	228	229	230	231	232	233	234	235	236	237	238	239	240
241	242	243	244	245	246	247	248	249	250	251	252	253	254	255
256	257	258	259	260	261	262	263	264	265	266	267	268	269	270
271	272	273	274	275	276	277	278	279	280	281	282	283	284	285
286	287	288	289	290	291	292	293	294	295	296	297	298	299	300

TOTAL MEALS SERVED (from front and back) =

Meals served to *paying* adults
1 2 3 4 5 6 7 8 9 10   **Total Adult Meals =**

By signing below, I certify that the above information is true and accurate:

SIGNATURE: _____ DATE: _____

Daily Meal Count Form Instructions

Each day, each school must take a meal count at every point of service. Cross out a number as students pass through the meal service line and receive a complete, reimbursable meal. The form also should be used to count meals served to paying adults. It is very important that documentation of meal counts contain all the items listed in the form for the Director to track and control food service at each site.

The form should be signed by the supervisor.

Correct: ///// 5   Incorrect: ✗ ⑤

Snack Attendance Roster — Food Nutrition Services

School Name: _____ School #: _____ Week Beginning: _____ # of Pages: _____

Program Name: _____ Afterschool Coordinator: _____ Initials: _____

Student Name		Date: Mon		Date: Tue		Date: Wed		Date: Thur		Date: Fri	
Last	First	Attn	Snk	Attn	Snk	Attn	Snk	Attn	Snk	Attn	Snk
1											
2											
3											
... (rows 4–30)											
Totals											

Remarks:

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1. _____ Verbal identification either by the student or by the cashier.

2. _____ Point of service (POS) is at the end of the serving line.

3. _____ The eligibility codes are mentioned.

4. _____ Back-up procedures.

5. _____ Field trip procedures – how meal temperatures will be maintained and POS.

6. _____ Out-of-cafeteria procedures – must mention the rosters will not be marked prior to a child receiving a meal.

7. _____ Roster will be returned to the cafeteria at the end of meal service.

8. _____ Computer and/or roster.

9. _____ Sample of roster (i.e., daily roster and/or back-up procedures).

10. _____ Edit checks.

11. _____ "At no time will the staff use memory to mark the POS roster."

12. _____ Statement to address payments for full-price or reduced-price meals and the prevention of overt identification.

NSLP COUNTING AND CLAIMING CHECKLIST

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EDIT CHECK OVERVIEW

THIS SECTION ON RECONCILIATION/EDIT CHECKS WILL REVIEW:
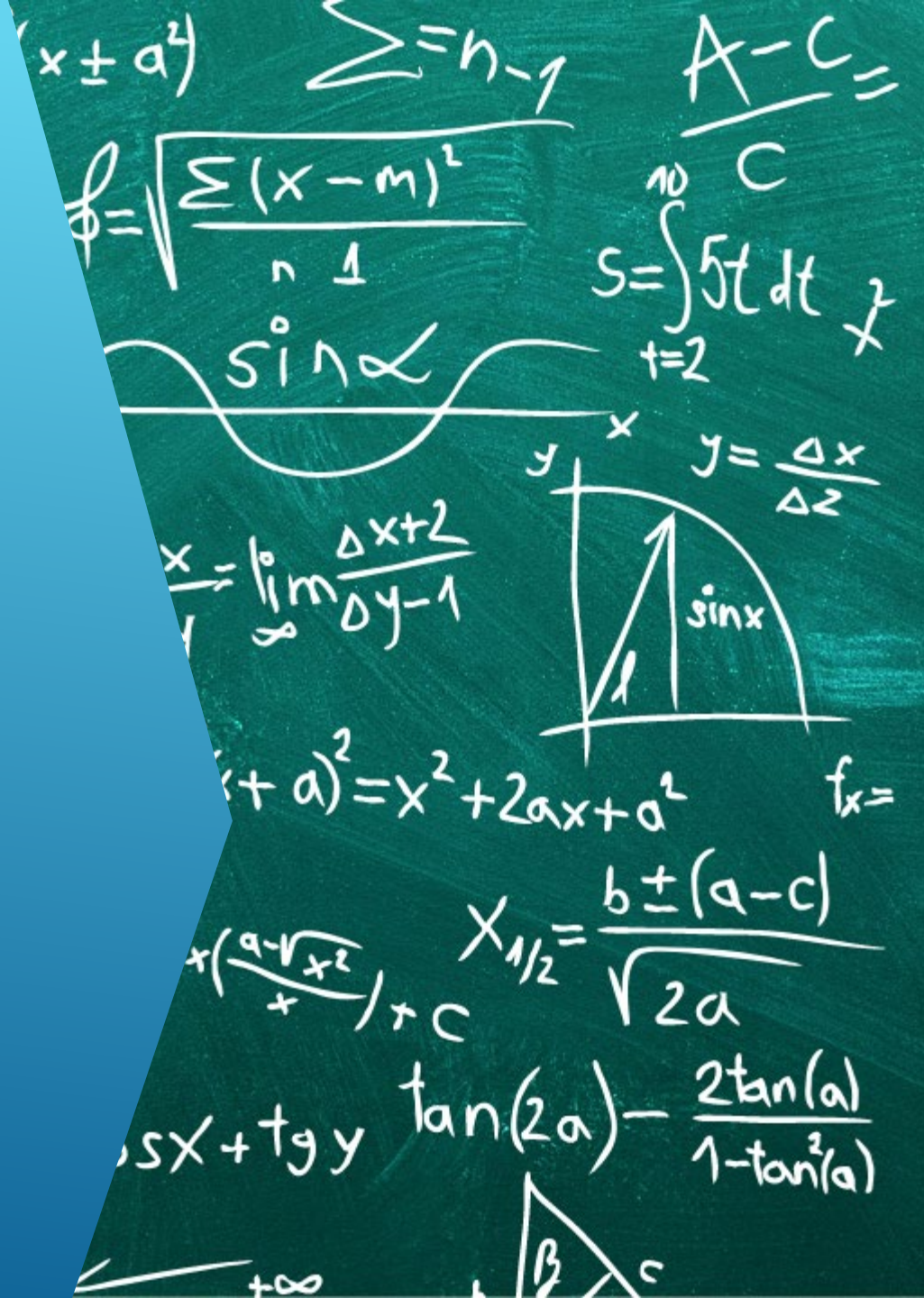
Resources Available to SFA's
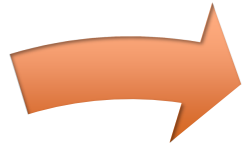
Edit Check Overview (SFA Role & Responsibilities)

Daily Edit Checks

Monthly Edit Checks

USDA Regulations on Fiscal Accountability for School Food Authorities: 7 CFR 210.8

▶ 7 CFR 210.8(a)(5): SFAs should maintain on file the written procedures for the monthly meal claiming procedures and edit checks. If more than one system is in place at different sites, written procedures should be maintained for each site. Procedures should state:

  ▶ How, when, and where a procedure is to be performed and which personnel position is responsible.

  ▶ Written procedures should be specific enough to allow substitute staff to implement an accurate monthly counting and claiming system.

  ▶ Hint: Many procedures available to our SFA's have been created and are available, please visit: https://drive.google.com/drive/folders/1wt0lypJTh2Uo5F36azdUoMyBw6n2SEoM?usp=sharing

▶ 7 CFR 210.8(a)(2)(i)(A): School Food Authorities are required to establish internal controls to ensure that accurate claims are being made for reimbursement.

  ▶ The edit check process must include the daily meal counts against the school's attendance.

  ▶ Hint: Attendance is reported via NOVA/STARS quarterly and enrollment is available online and the google drive.
    ▶ https://webnew.ped.state.nm.us/bureaus/information-technology/stars/
    ▶ https://drive.google.com/drive/folders/1wt0lypJTh2Uo5F36azdUoMyBw6n2SEoM?usp=sharing
    ▶ https://webnew.ped.state.nm.us/bureaus/student-success-wellness/student-success-wellness-data/

USDA REGULATIONS ON FISCAL ACCOUNTABILITY FOR SCHOOL FOOD AUTHORITIES: 7 CFR 210.8

- 7 CFR 210.8(a): Internal controls for Daily Counts:

  The school food authority shall establish internal controls which ensure the accuracy of meal counts prior to the submission of the monthly Claim for Reimbursement.

  - At a minimum, these internal controls shall include:

    - An on-site review of the meal counting and claiming system employed by each school within the jurisdiction of the school food authority;

    - Comparisons of daily meal counts against data which will assist in the identification of meal counts in excess of the number of meals served each day to children eligible for such meals;
      - As applicable to school's eligibility (Standard, Provision 2, CEP).

    - A system for following up on those meal counts which suggests the likelihood of meal counting problems.

- 7 CFR 210.8(a)(3)(i): Internal controls for Monthly Claims:

  Prior to the submission of a monthly Claim for Reimbursement, each school food authority shall review the lunch count data for each school under its jurisdiction to ensure the accuracy of the monthly Claim for Reimbursement. The objective of this review is to ensure that monthly claims include only the number of free, reduced price and paid lunches served on any day of operation to children currently eligible for such lunches.

  - These internal controls shall include:

    - Edit Checks: The school food authority shall compare each school's daily counts of meals against the product of the number of children in that school currently eligible for meals, respectively, times an attendance factor.

MEAL COUNTING AND CLAIMING IS THE BASIS OF THE NSLP PROGRAM.

AN ACCURATE MEAL COUNT IS REQUIRED IN ORDER TO KNOW HOW MUCH TO REIMBURSE SCHOOLS.

WITHOUT AN ACCURATE COUNT, WE COULD BE THROWING THOUSANDS OF DOLLARS IN ONE SCHOOLS THAT OVER-CLAIMED, AND SHORTING ANOTHER SCHOOL THAT REALLY NEEDS THE FUNDING.

IT IS REQUIRED FOR SFAS TO ESTABLISH AN ACCURATE SYSTEM FOR COUNTING, COLLECTING AND CLAIMING MEALS BY FREE, REDUCED AND PAID CATEGORY FOR STANDARD SCHOOLS, OR TOTAL MEAL COUNTS FOR CEP / P2, THAT CONSISTENTLY YIELDS CORRECT CLAIM RESULTS.

WHY IS ACCURACY IMPORTANT?

Daily

Establish Daily Meal Count Internal Control at Point of Service (can be electronic or manual).

Establish Daily Edit Check (On-Site Review of Counting and Claiming System)

For questions or guidance on these items, please reach out to your assigned Health Educator

Monthly

Establish Monthly Edit Checks Monthly Meal Claim Internal Controls

Yearly

Maintain Proper Recordkeeping.

SFAs must have adequate support documentation on file for the number of meals claimed.

Maintain Student Eligibility Documentation (STANDARD, CEP & P2)

SCHOOL FOOD AUTHORITY RESPONSIBILITIES:

DAILY MEAL COUNT EDIT CHECKS
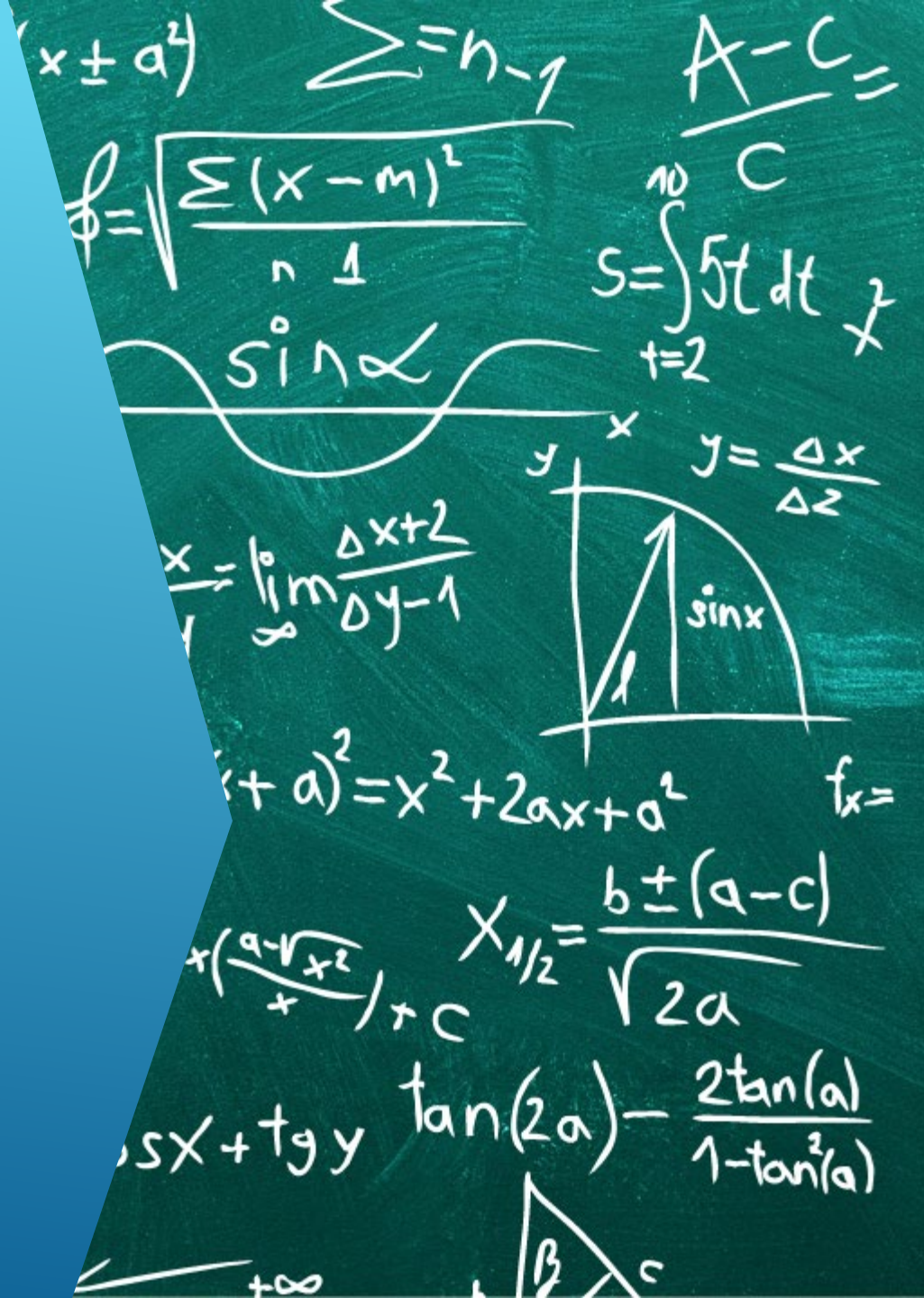
- SFAs are required to perform Daily Edit Checks per USDA Regulations

- The purpose of the Daily Edit Check is to identify any errors *prior* to the submission of the monthly claim.

- Daily Edit Checks are to occur every day that NSLP meals are served.

- When an error is found, it is up to the SFA to investigate further and make any necessary corrections prior to the submission of their claim.

DAILY MEAL COUNT EDIT CHECKS

PERFORMING DAILY EDIT CHECKS

- SFAs can download the Daily Edit Checks excel templates from SFA Resource Center:

  https://drive.google.com/drive/folders/1wt0lypJTh2Uo5F36azdUoMyBw6n2SEoM?usp=share_link
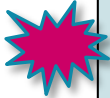
- There are two different Daily Edit Check excel files:

  - STANDARD

  - CEP & P2

X	Procedures for SFAs - Claims - Edit Checks for Claims DAILY CEP&P2 (Excel).xlsx
X	Procedures for SFAs - Claims - Edit Checks for Claims DAILY STANDARD (Excel).xlsx

PERFORMING DAILY EDIT CHECKS - STANDARD

- There are several fields that are required to be completed.

- **Public Schools are _required_ to use the most recent NOVA/STARS Snapshot information for Enrollment/ Attendance Factor fields**

PERFORMING DAILY EDIT CHECKS – CEP & P2

- There are several fields that are required to be completed.
- Public Schools are **required** to use the most recent NOVA/STARS Snapshot information for Enrollment & Attendance Factor fields

DAILY Edit Check (CEP & P2)

CEP & P2 Daily Edit Check				
School:		**Enrollment:**		*(Public Schools: Required to use most recent Enrollment from Snapshot as reported from STARS)*
Month:	August	**Attendance Factor:**		*(Public Schools: Required to use most recent Rolling Attendance Average from Snapshot as reported from STARS)*
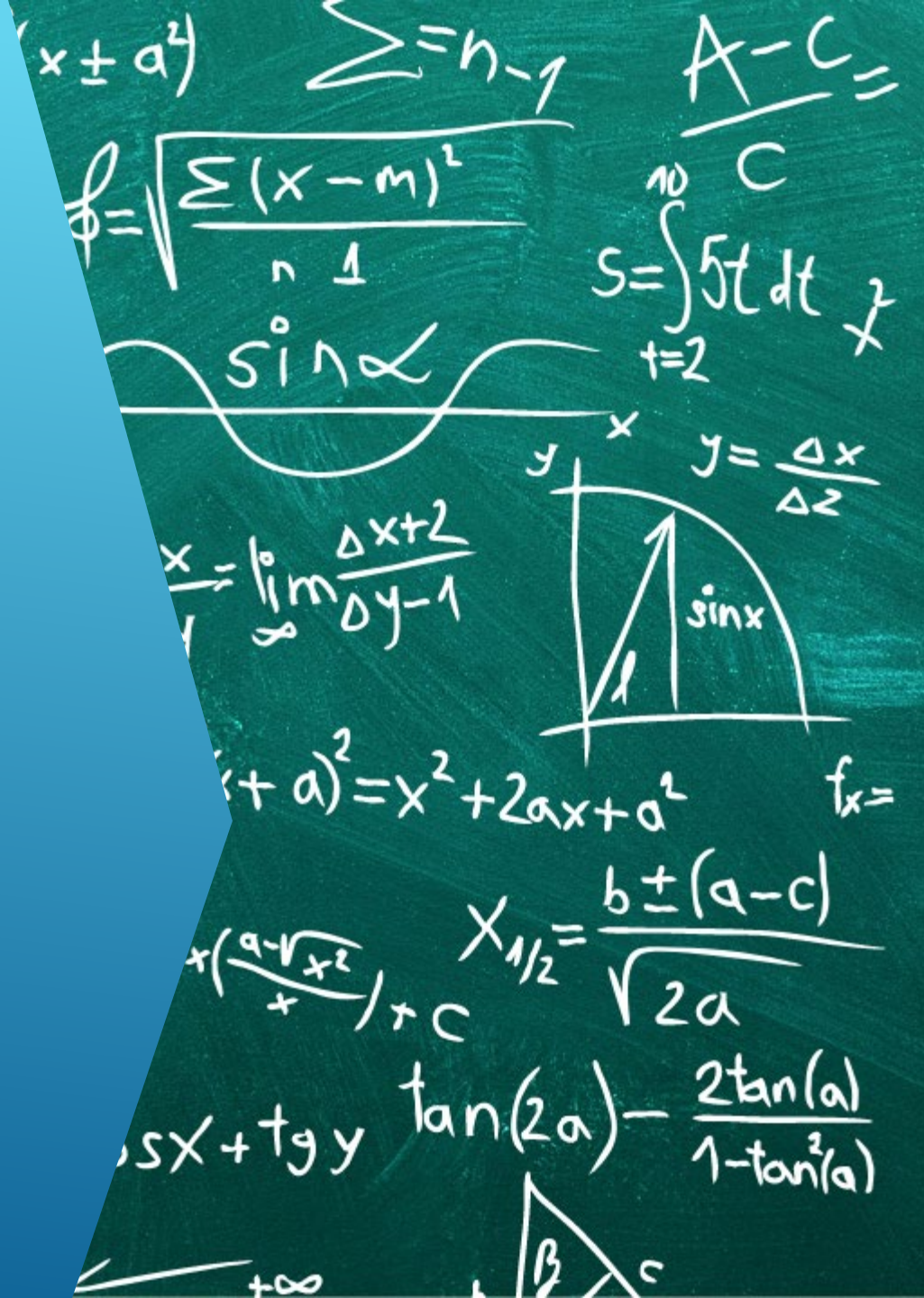
MONTHLY MEAL COUNT EDIT CHECKS

▸ **SFAs are required to perform Monthly Edit Checks per USDA Regulations**

▸ **The purpose of the Monthly Edit Check is to identify any errors *prior* to the submission of the monthly claim.**

▸ **Monthly Edit Checks are to occur every for every month that NSLP meals are served.**

▸ **When an error is found, it is up to the SFA to investigate further and make any necessary corrections *prior* to the submission of their claim.**

PERFORMING MONTHLY EDIT CHECKS

- **SFAs can download the Monthly Edit Check excel templates from SFA Resource Center:**

  https://drive.google.com/drive/folders/1wt0lypJTh2Uo5F36azdUoMyBw6n2SEoM?usp=share_link

- Tabs for STANDARD and CEP&P2 are in the same excel file.

Procedures for SFAs - Claims - Edit Checks for Claims MONTHLY CEP&P2&STANDARD (Excel).xlsx

| CEP or P2 - BREAKFAST | CEP or P2 - LUNCH | STANDARD - BREAKFAST - FREE | STANDARD - LUNCH - FREE | STANDARD - BREAKFAST - REDUCED | STANDARD - LUNCH - REDUCED | STAND ... |

PERFORMING MONTHLY EDIT CHECKS

- **There are several fields that are required to be completed.**

- **Public Schools are *required* to use the most recent NOVA/STARS Snapshot information for Enrollment & Attendance Factor fields.**

- **Threshold of 5% over Meal Count is compared to Meal Counts.**

- **Visual Cue: If the "Blue" Meal Count is longer than the "Pink", it is a red flag, and requires further investigation, because the meal counts are higher than the student's attending / enrolled.**
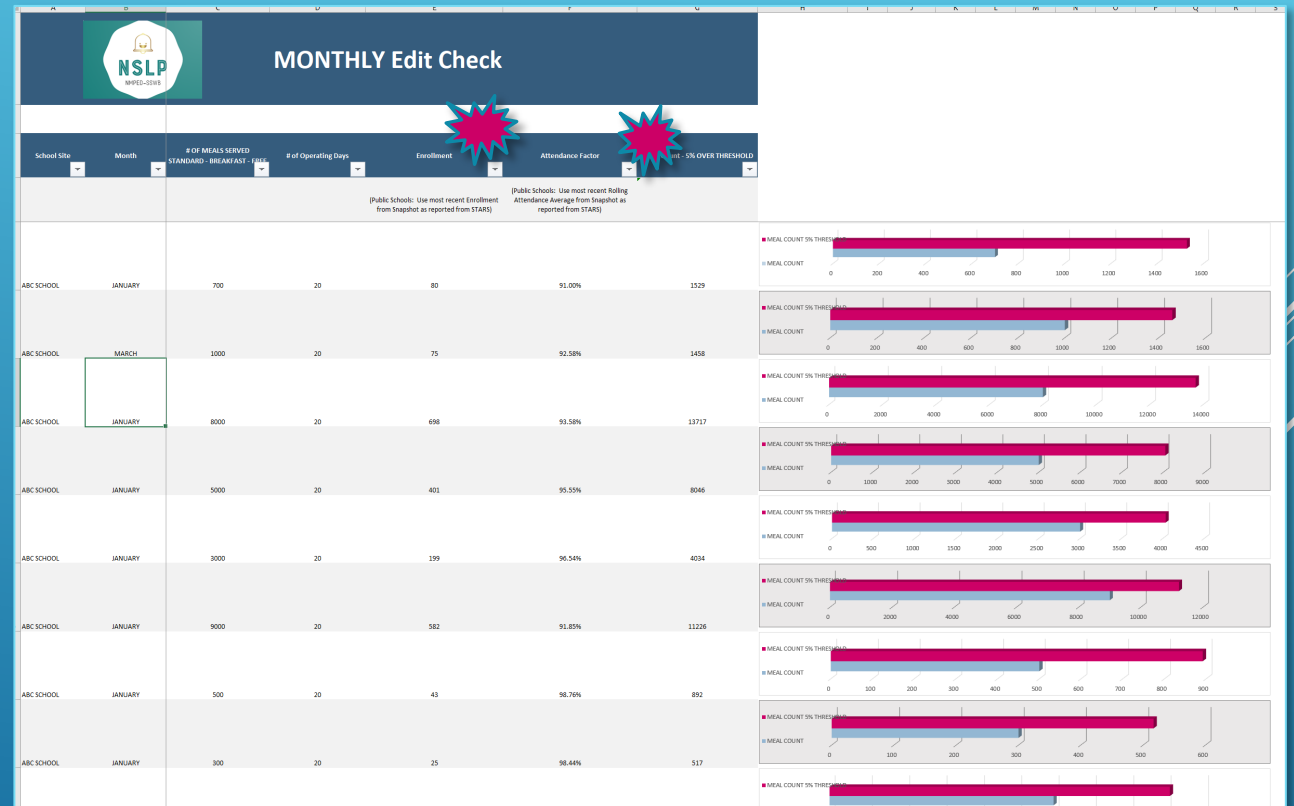
PUBLIC SCHOOLS – NOVA/STARS REPORTS (RESOURCES) FOR EDIT CHECKS
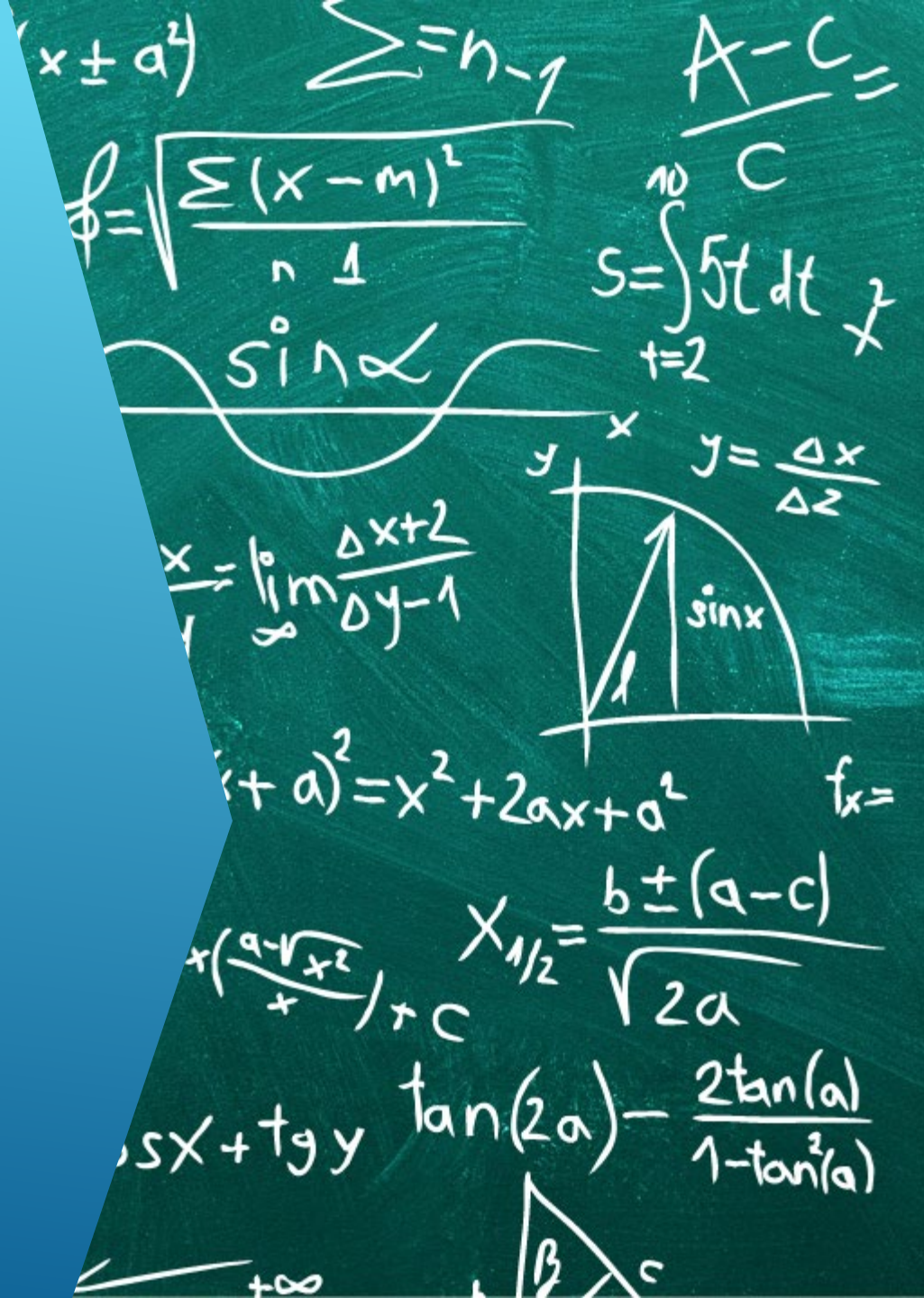
HOW TO LEVERAGE NOVA/STARS SNAPSHOT DATA FOR EDIT CHECKS

October Snapshot*

STARS Snapshots provide:

Certified Enrollment Number

Average Attendance (sometimes referred to as Attendance Factor)

Best Practice: Set Red Flag Edit Checks enrollment and/or average attendance to flag if your counts fall UNDER or ABOVE a 5% enrollment variance.

Red flags should trigger the SFA to verify and double-check the claim amounts PRIOR to submission.

Enrollment Numbers: Update your Application with your Enrollment numbers to reflect the newest/accurate enrollment numbers so the system will flag you.

December

As each Snapshot is updated and entered, update your Red Flag Edit Check *enrollment numbers* to reflect the newest enrollment.

As each Snapshot is updated and entered, update your Red Flag Edit Check *average attendance* numbers to reflect the newest enrollment.

March

Use this Snapshot enrollment to complete your NEXT YEAR USDA ANNUAL Application AND to update Red Flag Edit Check *enrollment* numbers.

As each Snapshot is updated and entered, update your Red Flag Edit Check *average attendance* amounts to reflect the newest enrollment.
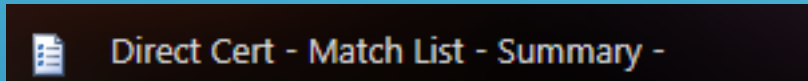
June

Although the last of the year, use this Snapshot to further refine your Red Flag Edit Check *enrollment* and *average attendance* numbers.

*Before October Snapshot: Use Live Data until October is submitted/certified.

NOVA/STARS SNAPSHOT REPORTS FOR PUBLIC SCHOOLS

- Enrollment Reports are found on DC:

  📄 Direct Cert - Match List - Summary -

- Attendance Reports are found:

  District and School Reports · Attendance

- **Please work with your NOVA/STARS Coordinator to identify /run /download the report that incorporates the most seamlessly into your Edit Checks.**

Or leverage your School's SIS (Student Information System) system to pull these reports. (Successful SFA's have a monthly meeting with their NOVA/STARS Coordinator to discuss needs/updates.

ADDITIONAL RESOURCES FOR RECONCILIATION (AKA) EDIT CHECKS:
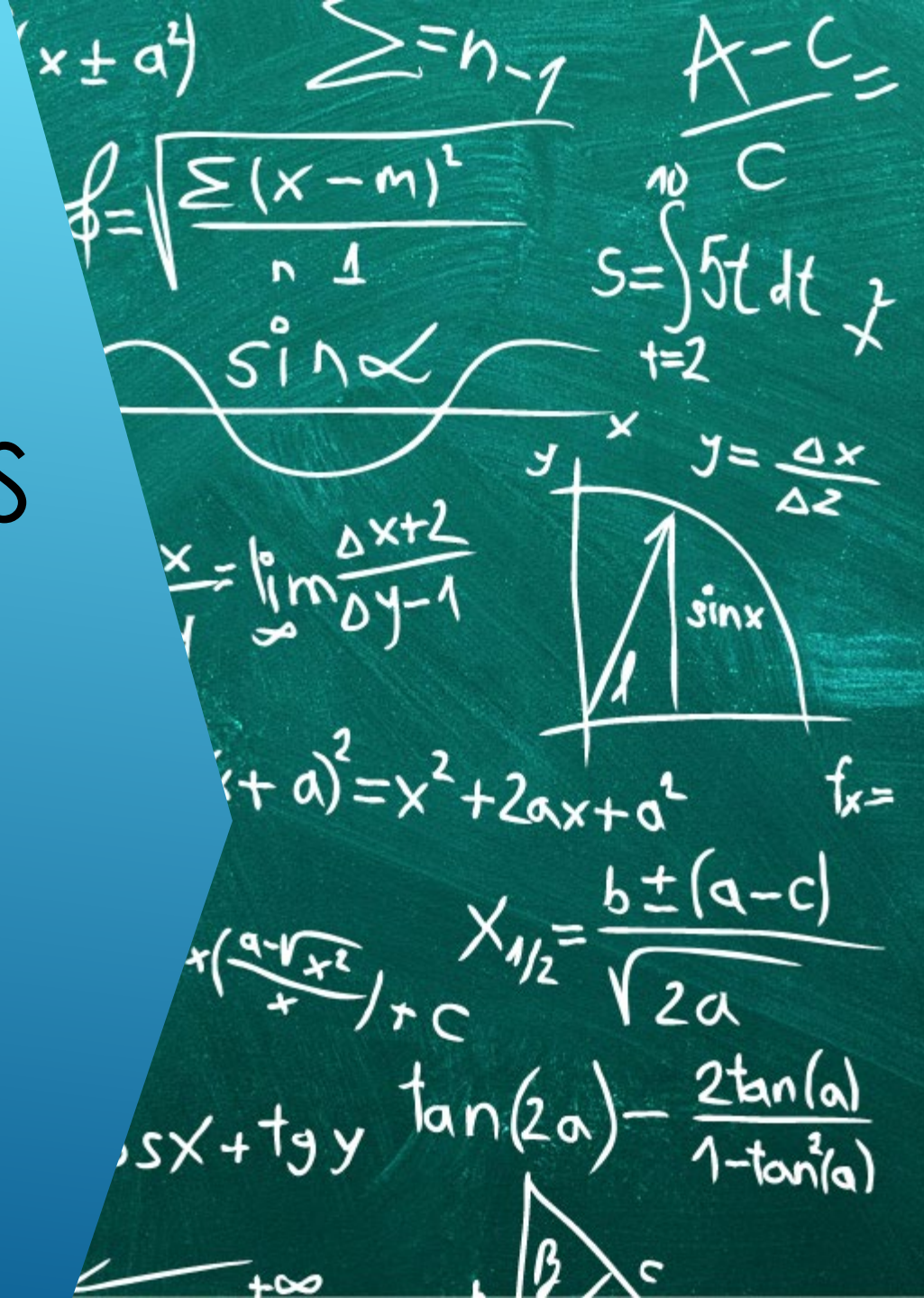
LEVERAGE NSLP MASTER LIST'S EDIT CHECKS ON GOOGLE DRIVE

- **Download the NSLP Master List excel file:**

  https://drive.google.com/drive/folders/1wt0lypJTh2Uo5F36 azdUoMyBw6n2SEoM?usp=sharing

  NSLP Master List for SY
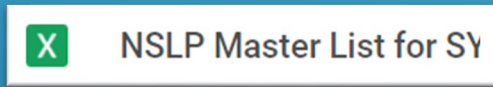
- **Enter in # of days operating for the month.**

  DD

  Edit Check for SFA Claims

  Enter # of Days Operating for Claim Month

- Excel formulas are left unlocked: Customize formulas, or thresholds as needed.

CREATING & SUBMITTING CLAIMS
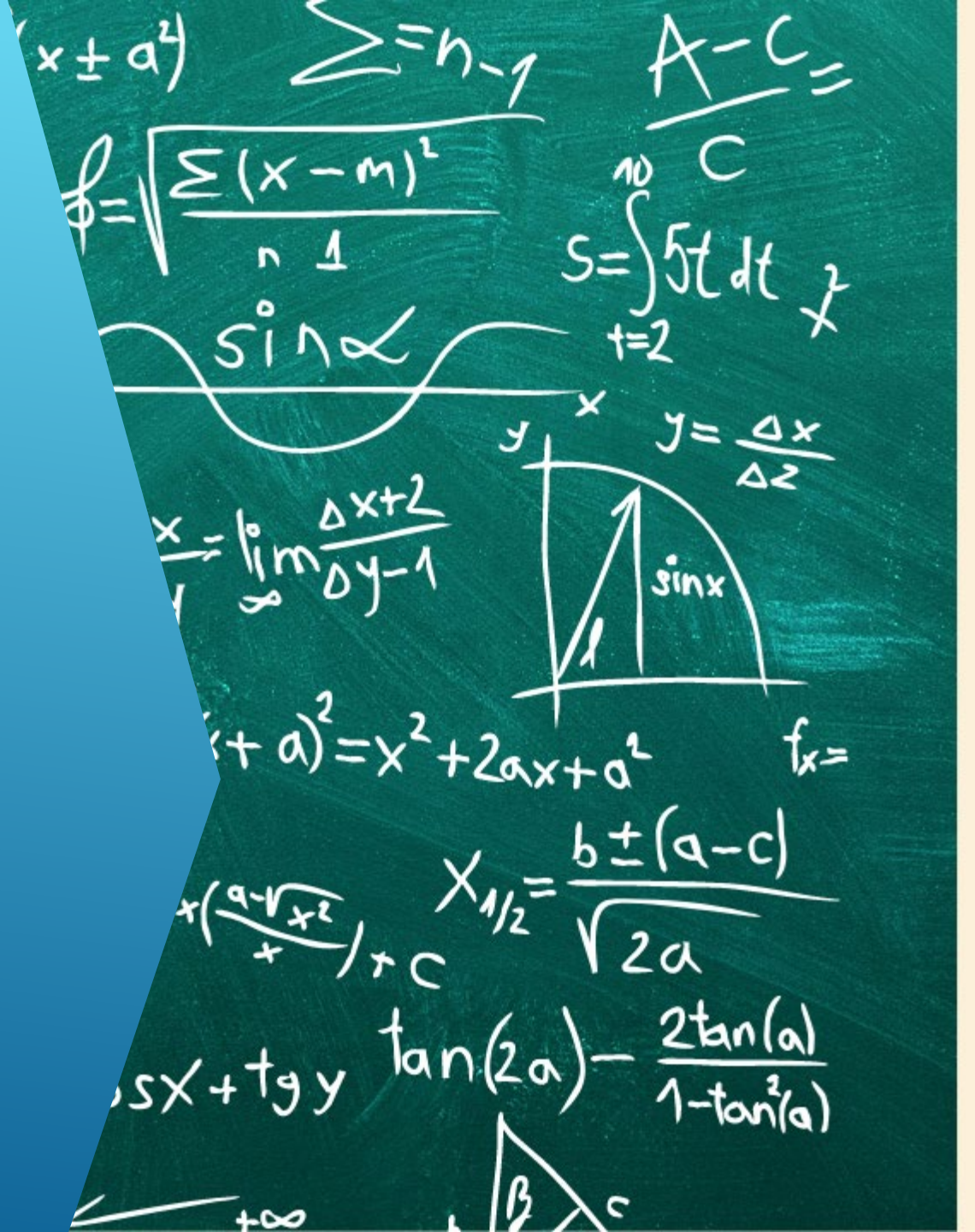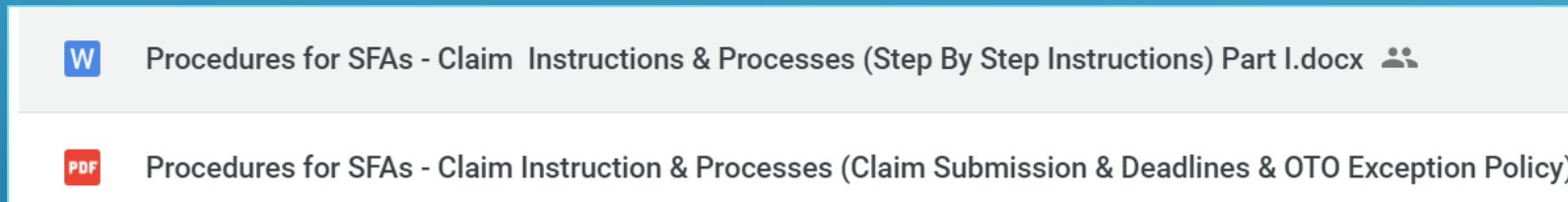
SUBMITTING MONTHLY CLAIM
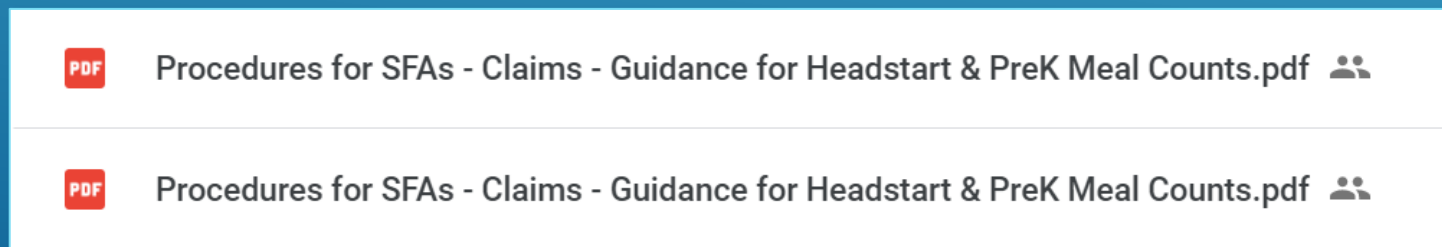
- SFA Resource Center:

  https://drive.google.com/drive/folders/1wt0lypJTh2Uo5F36azdUoMyBw6n2SEoM?usp=share_link

- Download the Step-by-Step Instructions on how to Enter in Monthly Claims into Nutritional System:

W	Procedures for SFAs - Claim Instructions & Processes (Step By Step Instructions) Part I.docx 👥
PDF	Procedures for SFAs - Claim Instruction & Processes (Claim Submission & Deadlines & OTO Exception Policy)

PDF	Procedures for SFAs - Claims - Guidance for Headstart & PreK Meal Counts.pdf 👥
PDF	Procedures for SFAs - Claims - Guidance for Headstart & PreK Meal Counts.pdf 👥

SUBMITTING MONTHLY CLAIM

- Link to Webinar, Step by Step Instructions on how to Submit a Claim:

  https://youtu.be/vbWLzdE-zzk

- **Claim Submission Deadlines – Excel Printable & Outlook Reminders:**

X SY21-22 Claims Payment Process Schedule & FFY21-22 Claim Submission Deadlin.	NSLP SSO Claim Submission Deadlines - iCalendars for Outlook
X SY22-23 Claims Payment Process Schedule & SY22-23 Claim Submission Deadlin...	

MONTHLY CLAIM AREAS OF FOCUS

- To be eligible for reimbursement, a claim preparer for each School Food Authority (SFA) must submit a monthly claim for reimbursement that provides accurate data in sufficient detail to justify the reimbursement claimed. The data must include, at a minimum, all participating schools, and programs approved to operate, the number of free meals, reduced-priced meals, and paid meals served. An authorized agent or district official of the SFA must certify and submit the claim in the New Mexico Student Nutrition Portal

- *Claims are due by the tenth (10th) day of the following month being claimed.* Claims submitted timely are given first priority. Those submitted after the due date may be delayed in payment. • All claims submitted by the SFA authorized official will be considered certified and a valid claim. • All original and upward adjusted claims not submitted by the due date (10th) may still be submitted by no later than the sixtieth (60th) day following the last day of the month claimed to be considered for payment (see "Claim Deadline Dates"). • Claims submitted after the 60th-day deadline cannot be processed, see "Late Claims"

- Upon occasion, claims may require an adjustment or a correction by the SFA. SFA's oversight: • It is the SFA's obligation to notify the Student Success and Wellness Bureau (SSWB). Then, the claim can be reentered, certified, and submitted again. Please note, editing a claim upwards (for more money) is not permitted after the 60th-day deadline, see "Late Claims". Directed by the State Agency Staff: • Upon occasion, claims may require an adjustment or a correction by the SFA due to a State Agency (SA) claim's review, administrative review, or audit process. Therefore, these claims must be re-entered, certified, and submitted in the NMSNP as directed by the State Agency. It is the SFA's ultimate responsibility to enter claims. SFA's must follow through on all claims, to ensure that it was submitted correctly to SSWB for approval.

LOGGING IN TO THE CLAIMS PORTAL:

ENTER CREDENTIALS:

- You may be prompted to the NMPED Privacy Statement, after reading the statement, click "Select SFA Button" and you will land on the SFA Main Page.
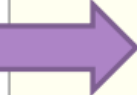
"Click" the **Select SFA** button

SEARCH FOR YOUR SITE:

SELECT "CLAIMS":

CREATE CLAIM:

.om the drop down box, select the type of claim you will be creating (National School Lunch Program (**NSLP**), Seamless Summer Program (**SSO**) or FreshFruit and Vegetable (**FFV**).)

- "Click" the **Create Claim** button to begin the claim.
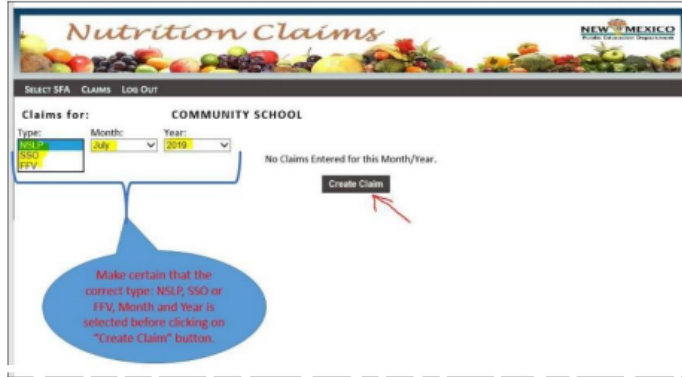
- A message will prompt you providing a second chance to confirm you do want to create the claim.

- If certain, proceed and click "**OK**".

- If you are not certain, click **Cancel.**
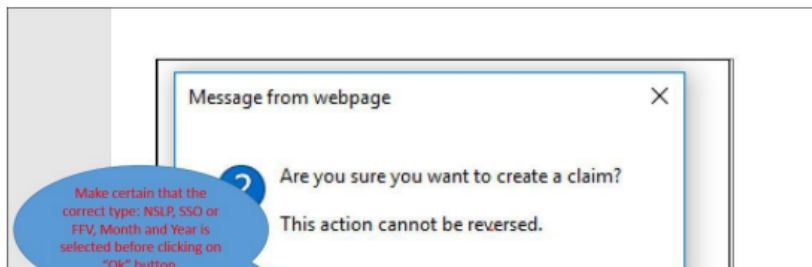
- "Click" on **Site Claims** to enter data for each School site.

| SELECT SFA | APPROVALS | TRANSACTIONS | PAYMENTS | REPORTS | ADMIN | RATES | LOG OUT |

Claims for: **COMMUNITY SCHOOL**

Type: [NSLP ▾]   Month: [July ▾]   Year: [2019 ▾]

Claim Work Started for Month/Year Requested

Select	Site Claims	Adjust	Amount	Last Updated	Submit Date	Status	Original
Summary	Site Claims	Adjust	$0.00	08-07-2019		In Progress	True

- "Click" on hyperlink to navigate through School/Sites and enter the site claim details.

- SFA's with several sites, click on the page numbers to scroll through the sites

Eligible School Listing for T

School/Site
CIELO AZUL ELEMENTARY
COLINAS DEL NORTE ELEMENTARY
EAGLE RIDGE MIDDLE
ENCHANTED HILLS ELEMENTARY
ERNEST STAPLETON ELEMENTARY
INDEPENDENCE HIGH SCHOOL

1 2 3

*Not all SFA's have multiple pages

[Claim Summary]   [Clai...]

- Enter the school/site claim meal count and information for each individual school / site (see below)

Number of Days In Operation for this MONTH *	21			Number of Students Enrolled *	293

Breakfasts	Count	Rate			Amount
Free	275	$2.20			$605.00
Paid:	75	$0.31			$23.25
Total	350		Total Breakfast:		$628.25
Lunches	**Count**	**Rate**			**Amount**
Free	275	$3.50			$962.50
Paid	75	$0.41			$30.75
Total	350		Total Lunch:		$993.25
Snacks	**Count**	**Rate**			**Amount**
Free	200	$0.94			$188.00
Total	200		Total Snack:		$188.00
			Total School Claim:		$1,809.50

Calculate   Save

ENTERING NSLP CLAIMS: Standard / P2 Base Year Schools

- Enter in Days In Operation for this Month

- Number of Students Enrolled is prepopulated from previous month, if enrollment has changed, you must update to the correct number!

- Complete the enrollment for each category of enrolled students for that month (meal counts / claim documentation must support the numbers claimed)

- Students in the FREE / REDUCED / PAID categories must equal the total number of students enrolled, or the system will throw an error.

Standard / P2 Base Year Schools:

| Number of Days In Operation for this MONTH * | 21 | Number of Students Enrolled * | 784 |

Enter the number of students determined eligible in the following categories: Free [0] Reduced [0] Paid [0]

- Complete the Meal Counts for each Meal Type and Category (as applicable).

Breakfasts	Count
Free	0
Reduced	0
Paid:	0
Total	0
Lunches	Count
Free	0
Reduced	0
Paid	0
Total	0

Breakfasts	Count
Free	400
Reduced	300
Paid:	200
Total	0
Lunches	Count
Free	400
Reduced	200
Paid	100
Total	0
Snacks	Count
Free	400
Total	0

Complete the Meal Counts for each Meal Type (as applicable).

Breakfasts	Count
Free	0
Paid:	0
Total	0
Lunches	**Count**
Free	0
Paid	0
Total	0
Snacks	**Count**
Free	0
Total	0

Breakfasts	Count
Free	0
Paid:	0
Total	350
Lunches	**Count**
Free	0
Paid	0
Total	350
Snacks	**Count**
Free	200
Total	0

- **Print screen or screenshot the submitted claim for your records. It is the SFA's sole responsibility to ensure claims have been submitted timely.**

- For instructions on how to navigate to view your submitted claims, review this video: https://youtu.be/Nvhuoap-Orw

...cable to your situation, please see troubleshooting at the end of this section.

- Error when submitted Claim: Number of (breakfasts/lunches/snacks) served cannot be greater than Number of Days * Number of Children Enrolled.
  - Resolution:
    Double check meal counts adjust if numbers are incorrect
    Double check Number of Days in Operation for Month, adjust number if needed
    Double check Number of Students Enrolled, adjust number if needed.

snsdev.ped.state.nm.us says

Number of snacks served cannot be greater than Number of Days *
Number of Children Enrolled.

OK

| Number of Days In Operation for this MONTH * | 0 | Number of Students Enrolled * | 486 |

- Error when creating Claim: This site is not claiming for (Month / Year)
  - Resolution:
    Month / Year was not selected on current year's Application, contact assigned Health Educator to request an Amendment to Application.

This site did not select to participate to claim this month.

- Error when creating Claim: The current application is not approved for Seamless Summer Program
  - Resolution:
    Application was not created for the SFA on current year's Application, contact assigned Health Educator to request an Amendment to Application.

snsdev.ped.state.nm.us says

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TROUBLESHOOTING

If the errors and/or solutions listed above and did not resolve your issue, please go through these steps:

- Please try different browsers to access the website and attempt to perform the action again.
Please try: Firefox & Chrome.
If the same error occurs again, please screenshot the ENTIRE SCREEN and paste into a separate word document. (See submitting Help Requests below).

- Please clear your caches for the different browsers and after clearing your cache, attempt to perform the action again.
For a tutorial on how to clear your cache, please watch this video for step by step instructions:
Google Chrome: https://www.youtube.com/watch?v=RUsouNnVgww
Firefox: https://www.youtube.com/watch?v=Gytod8qFJK4

- Please make sure you are using the correct log in and password. Please ask the second "backup" Nutrition Portal "User" from your SFA to log in, and attempt the same actions.
  - If the same error occurs again, please screenshot the ENTIRE SCREEN and paste into a separate word document. (See submitting Help Requests below).

- If it is an "access issue" (meaning you are not able to "look" "view" "edit" the information for a particular month), and this is the first time this error has occurred, please make sure to test the previous month's data, to see if you are able to perform the same action for the previous month. DO NOT SAVE ANY WORK YOU PERFORM FOR THE PREVIOUS MONTH.
  - If the same error occurs again, please screenshot the ENTIRE SCREEN and paste into a separate word document. (See submitting Help Requests below).

SUBMITTING HELP REQUESTS:

If you have completed the steps above, and still receive the error message and/or experience the problem again, please submit a Help Request to Kate Ullrich: kate.ullrich2@state.nm.us

Help Requests must contain the following information:
4-5 sentence description of what you were trying to accomplish and the steps you took leading up to the point of the

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CEP: STUDENT CHARGES VS CLAIM REIMBURSEMENT

- Several SFA's have a misconception on how CEP calculates your monthly claims FOR THE FEDERAL PORTION:

  - Student Charges = All Students Eat for Free

  - Claim Reimbursement = Ratio of FREE Meal Rates vs PAID Meal Rates is dependent on your 1.6 Multiplier.

- Please review this video to gain a better understanding of how CEP claims are calculated, FOR FEDERAL PORTION.

  https://youtu.be/0v7O7i2ETcY

- Please see above for State Differential Reimbursements under Universal Healthy School bill.

VERIFYING SUBMISSION OF MONTHLY CLAIM
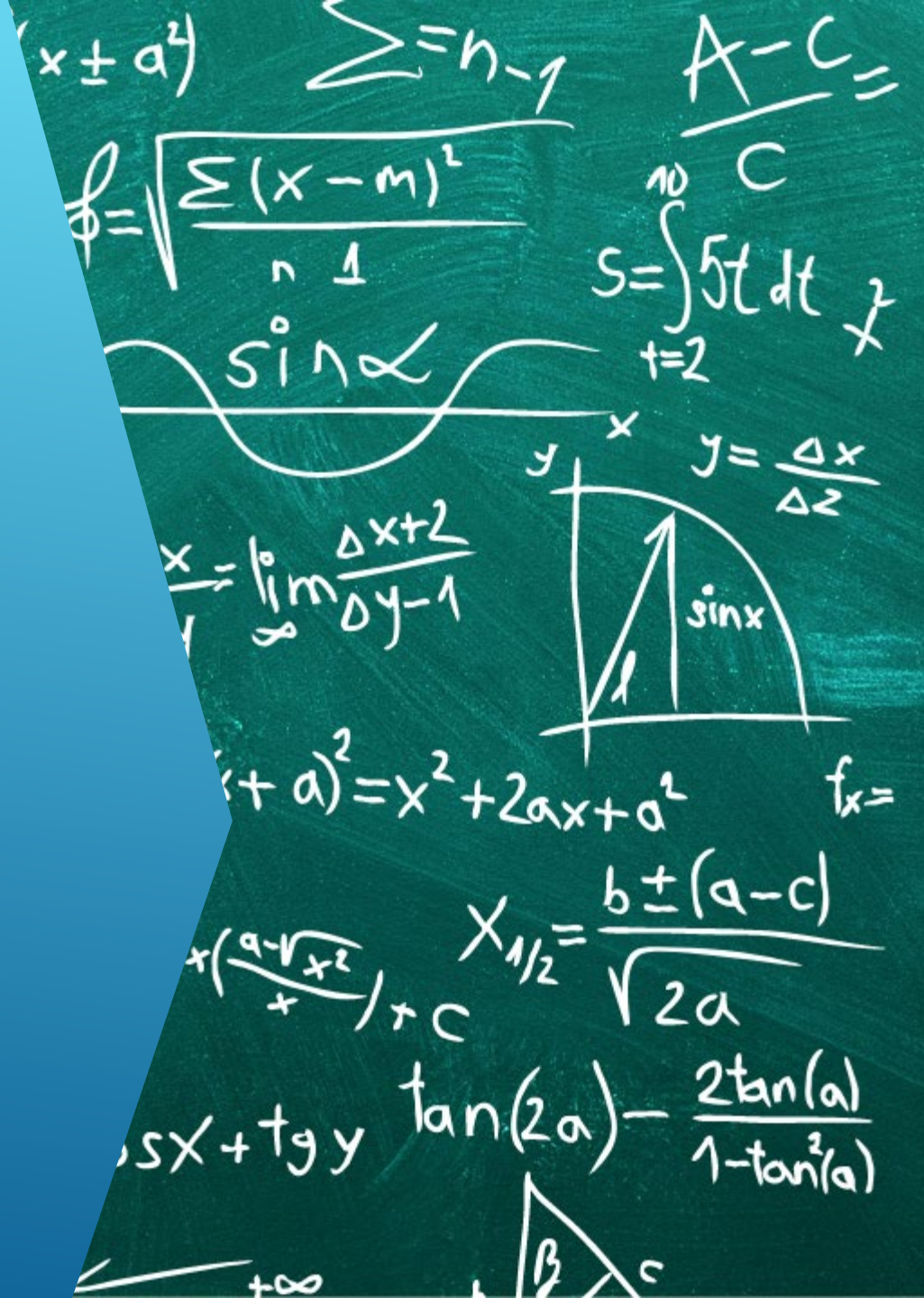
THIS SECTION ON VERIFYING CLAIM SUBMISSIONS WILL REVIEW:

Payment Process Overview (SFA Role & Responsibilities & Deadlines/Timelines)

Verifying Submission of Monthly Claim

Link to Online Tutorial on how to Check Claim Status

Deadlines of Claim Submissions

PAYMENT PROCESSES:

Current Claim Status: Submitted

First of Month
SFA's are able to enter in claims in Portal

10th of the Month
SFA's Submit Claims by 10th to ensure they make the current month's Payment Run

Fiscal Coordinator Approves

PAYMENT PROCESSES

21st of the Month
Submitted Claims are approved, and are sent to PED Finance Department for Entry of Vouchers into SHARE

Current Claim Status: Processed

Financial ASD Team Processes
Creates Entry of Vouchers in SHARE (requires approx. 30 days to complete)

15th of the NEXT Month
Completes the processing of all Vouchers in SHARE

Current Claim Status: Approved

PAYMENT PROCESSES

DFA Pays
Pays Vouchers to send Claim Reimbursement for ACH's / Issuance of Vouchers (Checks)

2-7 BUSINESS DAYS
SHARE provides ACH / Voucher Information to applicable banking institutions

Current Claim Status: Paid

PAYMENT PROCESSES

Timeline is only applicable if the process does not encounter any system errors, banking errors, etc.

If deadlines land on a weekend or holiday, the deadlines are pushed to the next business day.

Deadlines are a moving target, and will be processed earlier if possible.

Once Wells Fargo issues banking info in SHARE, we no longer have any visibility into the transactions the SFA's Bank performs or how long it takes for them to post into each SFA's account.

PAYMENT PROCESSES

When should SFA's be concerned their payment has not been received?

*At the time the SFA is entering in their new claim for the new month, SFA's should use that opportunity to double check their claim has been **submitted** properly for the two previous months in the Nutritional Portal FIRST.*

If the payments were submitted in a timely fashion, given the cycle of payments, an SFA should become concerned six weeks after the 15th of the month of which the claim was Submitted and Approved.

For example:

February's Claim can be created and submitted starting and after March 1.
The payment run for the February claim occurs March 15.
Six weeks from the March 15 Payment Run is April 30th.
In this example, the SFA should reach out to follow up on payment status only after they have 1) confirmed they submitted timely and 2) AFTER May 1

Claim Month:	1st Day Claim Can Be Created:	Claim Was Submitted on the First Payment Run Date:	SFA Has Verified the Payment Was Submitted timely and by the 10th:	SFA should reach out to SSWB if the payment was submitted timely, by the 10th AND has NOT been deposited (or check issued) by:
July	*August 1*	*August 10*	*Yes*	*October 1*
August	*September 1*	*September 10*	*Yes*	*November 1*
September	*October 1*	*October 10*	*Yes*	*December 1*
October	November 1	November 10	Yes	January 1
November	December 1	December 10	Yes	February 1
December	January 1	January 10	Yes	March 1
January	February 1	February 10	Yes	April 1
Feburary	March 1	March 10	Yes	May 1
March	April 1	April 10	Yes	June 1
April	May 1	May 10	Yes	July 1
May	June 1	June 10	Yes	August 1

*Payments submitted **after** the First Payment Run Date will be picked up on the following payment run and will follow that timeline*

Is not applicable for OTO Payments or June/July/August/September Claims

PAYMENT PROCESSES

▸ **Why is this timeline is NOT applicable to end of the Fiscal Year, June or the beginning of the School Year's Claims (July, August, September)**

▸ *June: Because of State-Wide end of fiscal year financial statement obligations, Finance chooses to accrue the amounts processed on the July 15 pay run (this would include the June Claim Month and any May Claims that were submitted after June 15) Finance will post/process these payments at the end of September.   For payments processed on the July 15 payment run, please follow up after October 1 if payment has not been received.*

▸ *July/August/September – Finance must create individual PO's for each SFA's, in SHARE, based on the amount of money they expect to pay out. Creating estimates and individual PO's is time consuming, and is not completed until the end of the Calendar year. Please do not expect July/August/September's claims to be paid out until December.*

VERIFYING SUBMISSION OF MONTHLY CLAIM

Current Claim Status:
- "In Progress"
- SFA has **NOT** completed Claim entry & **MUST** submit to be reimbursed.

Current Claim Status:
- "Submitted"
- SFA has completed Claim entry and claim will be "picked up" in the next payment run.

Verify Submission

Verify Current Claim and Previous Claims have been Submitted.
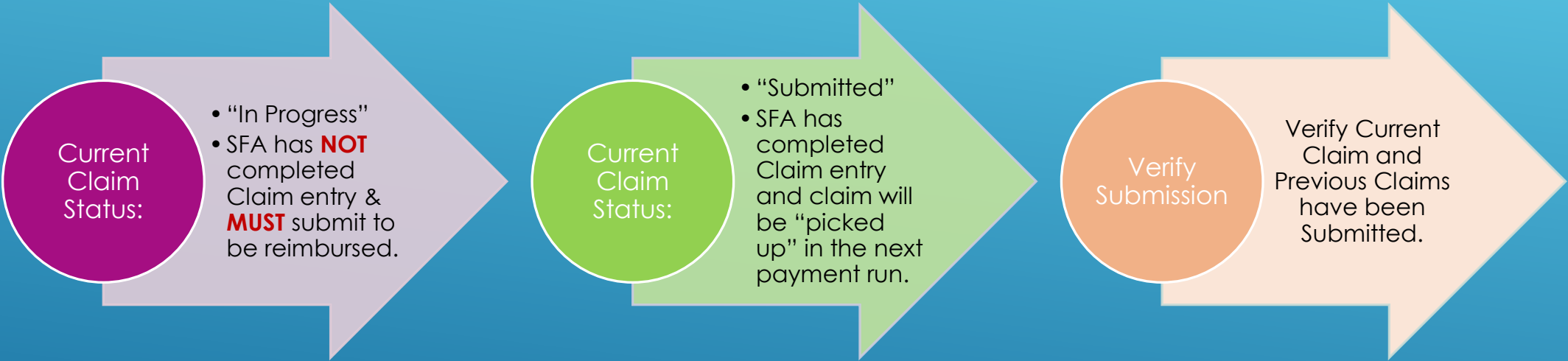
Current Claim Status: In Progress

Current Claim Status: Submitted

Any of these four statuses mean the claim has been submitted by the SFA, and is currently going through the payment process..

Current Claim Status: Submitted

Current Claim Status: Approved

Current Claim Status: Processed

Current Claim Status: Paid

VERIFYING SUBMISSION OF MONTHLY CLAIM

Current Claim Status:

- "In Progress"
- SFA has **NOT** completed Claim Entry & **MUST** submit to be reimbursed.

Current Claim Status: In Progress

VERIFYING SUBMISSION OF MONTHLY CLAIM

Current Claim Status:

- "Submitted"
- SFA has completed Claim entry and claim will be "picked up" on the next payment run.

Current Claim Status: Submitted

VERIFYING SUBMISSION OF MONTHLY CLAIM

Verify Submission

Verify Current Claim and Previous Claims have been Submitted.

Current Claim Status: Submitted

Current Claim Status: Approved

Current Claim Status: Processed

Current Claim Status: Paid

VERIFYING SUBMISSION OF MONTHLY CLAIM

- SFA Resource Center:

  https://drive.google.com/drive/folders/1wt0lypJTh2Uo5F36azdUoMyBw6n2SEoM?usp=share_link

- Link to Step-by-Step Tutorial on how to check the status of your claim in the Nutritional Portal:

  https://youtu.be/Nvhuoap-Orw

CLAIMS PAYMENT PROCESS SCHEDULE & CLAIM SUBMISSION DEADLINES

- SFA Resource Center:

  https://drive.google.com/drive/folders/1wt0lypJTh2Uo5F36azdUoMyBw6n2SEoM?usp=share_link

  SY23-24 Claims Payment Process Schedule & SY23-24 Claim Submission Deadlines.xlsx

- Payment Runs:

CLAIMS PAYMENT PROCESS SCHEDULE & CLAIM SUBMISSION DEADLINES

- Submission Deadline:

July 2023 through June 2024	
Claim Month	**Submission Deadline**
July 2023	Saturday, September 30, 2023
August 2023	Tuesday, October 31, 2023
September 2023	Thursday, November 30, 2023
October 2023	Sunday, December 31, 2023
November 2023	Wednesday, January 31, 2024
December 2023	Wednesday, February 28, 2024
January 2024	Sunday, March 31, 2024
February 2024	Tuesday, April 30, 2024
March 2024	Friday, May 31, 2024
April 2024	Sunday, June 30, 2024
May 2024	Wednesday, July 31, 2024
June 2024	Saturday, August 31, 2024

2023 Claim Payment Runs   2024 Claim Payment Runs   **Claim Submission - Deadlines**

Ready   Accessibility: Investigate

STATE'S EDIT CHECKS

▸ State detects a significant discrepancy of NOVA/STARS enrollment and meal counts:

▸ State provides deadline to submit explanation and Corrective Action Plan.

▸ SFA to complete the online form to submit explanation / corrective action plan:

▸ https://forms.office.com/g/VJFtERMMyR

▸ Outcome is dependent on reasons, severity, timeliness to respond and is addressed on a case-by-case basis.
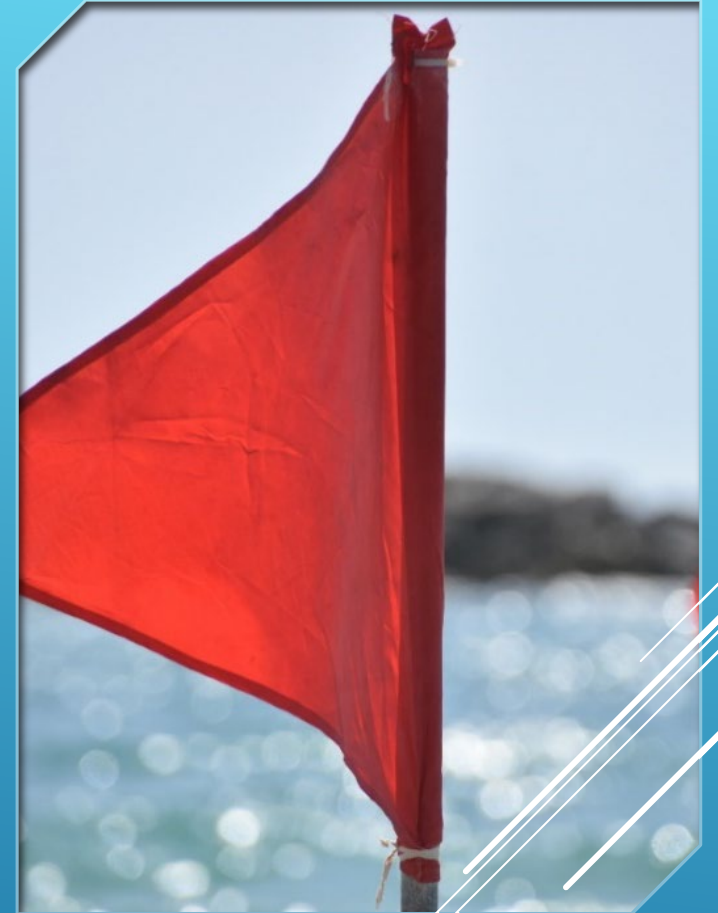
WHAT WE REVIEWED IN THIS PRESENTATION:

Healthy Universal School Meals Law Impact

Meal Counting (at Time of Meal Service)

Reconciling / Edit Checks to Prepare to Submit Monthly Claim

Submitting Monthly Claim

Verifying Submissions of Monthly Claims

QUESTIONS?

Attend the Data Coordinator's Office Hours every Monday, 2pm-3pm*

Open to all, join anytime - no set agenda, no need to RSVP

Zoom: https://us05web.zoom.us/j/6924895382?pwd=Qk1xWXVPUnlsdlNieHVHaWdXUDAzQT09

Meeting ID: 692 489 5382   Passcode: t7W3jp

(*If the Monday is a state holiday and state offices are closed, Office Hours will not occur).

Questions?

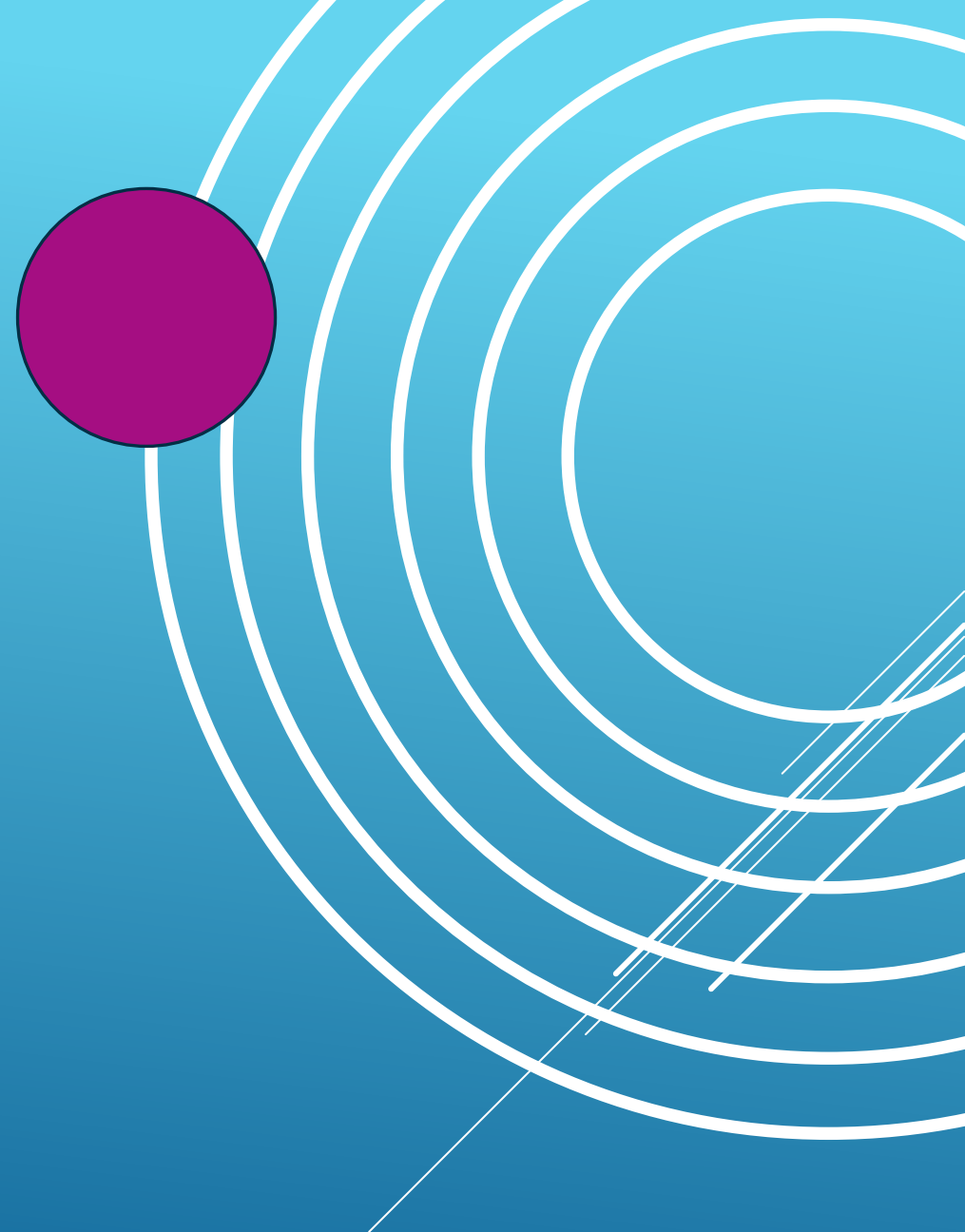## HEALTH EDUCATOR CONTACT INFORMATION

TRISTA RYAN HEALTH EDUCATOR (A-CO)
505-467-9964
TRISTA.RYAN@PED.NM.GOV

FELICIA GONZALES HEALTH EDUCATOR (CO-HO)
505-469-7014
FELICIA.GONZALES1@PED.NM.GOV

DARA LIVINGSTON HEALTH EDUCATOR (HO-ME)
505-365-3124
 DARA.LIVINGSTON@PED.NM.GOV

TERENCE MIRABAL HEALTH EDUCATOR (NA-SA)
505-396-1084
 TERENCE.MIRABAL@PED.NM.GOV

VACANCY: CONTACT RACHELE DIQUARTO TEMPORARILY   (SA-Z)

Questions?

STUDENT SUCCESS AND WELLNESS BUREAU CONTACT INFORMATION

If you are unsure what category your question/concern falls under, please start with your assigned Health Educator. If applicable, they will provide guidance on whom to contact.

SSWB DIRECTOR: MICHAEL CHAVEZ –
MICHAELA.CHAVEZ@PED.NM.GOV

SSWB DEPUTY DIRECTOR: LAURA HENRY-HAND –
LAURA.HENRY-HAND@PED.NM.GOV

SSWB NSLP STAFF MANAGER: RACHELE DIQUARTO
RACHELE.DIQUARTO@PED.NM.GOV
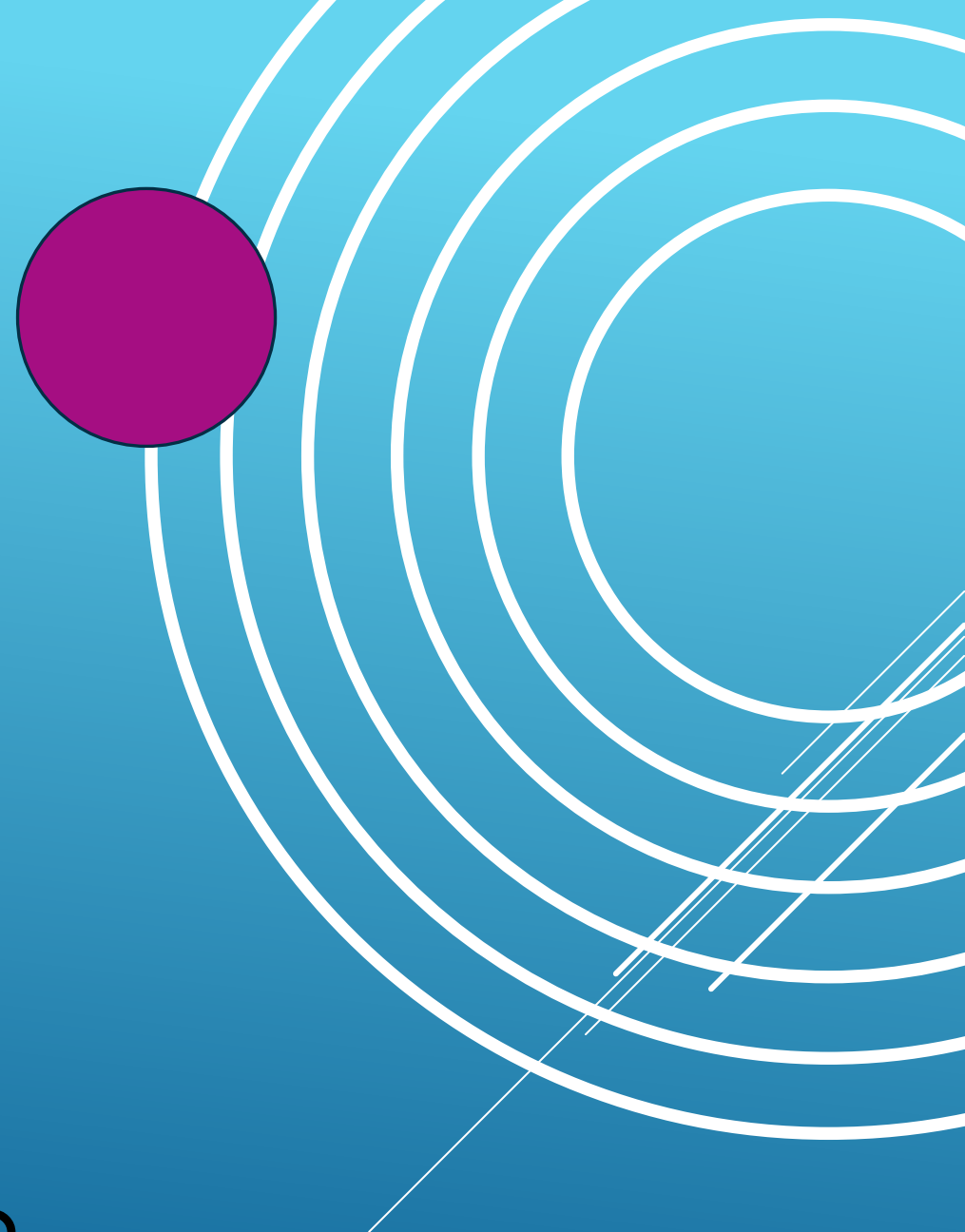
Questions?

CONTACTS CONTINUED…

QUESTIONS REGARDING COMPLIANCE-REGULATION:
PLEASE CONTACT YOUR ASSIGNED HEALTH EDUCATOR

QUESTIONS REGARDING CLAIMS, STUDENT ELIGIBILITY (STANDARD, CEP, P2):
PLEASE CONTACT DATA COORDINATOR, KATE ULLRICH KATE.ULLRICH2@PED.NM.GOV

QUESTIONS REGARDING PED BUDGETS, CONTRACTS AND PROCUREMENT:
PLEASE CONTACT VINCE BACA, VINCENT.BACA@PED.NM.GOV

QUESTIONS REGARDING FSMC CONTRACTS / CERTIFICATE OF AUTHORITY / SUMMER EBT/EBT:
PLEASE CONTACT JOSE L. GUZMAN, JOSEL.GUZMAN@PED.NM.GOV

QUESTIONS REGARDING STUDENT NUTRITION PORTAL - ASSISTANCE / DIRECT CERTIFICATION / REPORTING & ASSISTANCE
PLEASE CONTACT KRISTINA FERNANDEZ, KRISTINA.FERNANDEZ@PED.NM.GOV

QUESTIONS REGARDING HEALTHY UNIVERSAL SCHOOL MEALS:
STATE SB-4 STATE OPERATIONS
STATE SB-4 APPLICATIONS
STATE SB-4 NUTRITION
STATE SB-4 COMPLIANCE
ALBERT LOPEZ – SB-4 CULINARY SPECIALIST – ALBERT.LOPEZ@PED.NM.GOV
DIANA TARASIEWICZ – SB-4 CULINARY SPECIALIST - DIANA.TARASIEWICZ@PED.NM.GOV
LESLIE JHUNG – SB-4 NUTRITION SPECIALIST - LESLIE.JHUNG@PED.NM.GOV

SB-4 HEALTHY SCHOOL MEALS KIDS KITCHEN MANAGER:
ROSA LOPEZ – ROSA.LOPEZ@PED.NM.GOV

QUESTIONS REGARDING SB-4 HEALTHY UNIVERSAL SCHOOL MEALS COMPLIANCE:
FARM TO SCHOOL COORDINATOR:
 SHOSHANA WOODWORTH, SHOSHANA.WOODWORTH@PED.NM.GOV
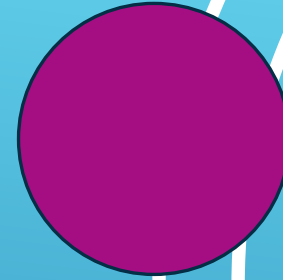
For all other FNS nutrition assistance programs, state or local agencies, and their subrecipients, must post the following Nondiscrimination Statement:

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at: https://www.usda.gov/sites/default/files/documents/ad-3027.pdf, from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

1.mail:
U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410; or

2.fax:
(833) 256-1665 or (202) 690-7442; or

3.email:
Program.Intake@usda.gov

This institution is an equal opportunity provider.

THANK YOU