Production Records in School Meals

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Objectives

- Understand the process and requirements for completing a production record.
- Understand the information included on the production record and why it is useful.
- Understand how to use the "factor method" for standardized recipes.
- Know what labels, documentation, and resources to use and maintain to credit foods correctly to the meal pattern.

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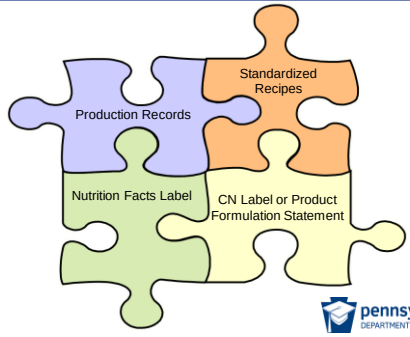
Goal: Menus Planned and Prepared in Required Quantity



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Meal Pattern Requirements by Age/Grade Group

Meal Pattern Chart, PDE721 on PEARS, Download Forms

Meal Pattern Chart- 5 Day Week *(Modified to Include K-8)*

Final Rule Nutrition Standards in the National School Lunch and School Breakfast Programs – January 2012, Revised 2014

	Breakfast Meal Pattern—5 day week				Lunch Meal Pattern—5 day week			
Grade	K-5	K-8	6-8	9-12	K-5	K-8	6-8	9-12
Meal Pattern	Amount of Food[a] Per Week (Minimum Per Day)							
Fruits (cups) [b, c]	5 (1) [a]	5 (1) [a]	5 (1) [a]	5 (1) [a]	2½ (½)	2½ (½)	2½ (½)	5 (1)
Vegetables (cups) [b, c]	0	0	0	0	3¾ (¾)	3¾ (¾)	3¾ (¾)	5 (1)
Dark green [d]	0	0	0	0	½	½	½	½
Red/ Orange [d]	0	0	0	0	¾	¾	¾	1¼
Beans/ Peas (Legumes) [d]	0	0	0	0	½	½	½	½
Starchy [d]	0	0	0	0	½	½	½	½
Other [d, e]	0	0	0	0	½	½	½	½
Additional Veg to Reach Total [f]	0	0	0	0	1	1	1	1½
Grains (oz. equivalent) [g]	7 (1)	8 (1)	8 (1)	9 (1)	8 (1)	8 (1)	8 (1)	10 (2)
Meats/Meat Alternates (oz. equivalent)	0#	0#	0#	0#	8 (1)	9 (1)	9 (1)	10 (2)
Fluid milk (cups) [h]	5 (1)	5 (1)	5 (1)	5 (1)	5 (1)	5 (1)	5 (1)	5 (1)
Other Specifications: Daily Amount Based on the Average for a 5-Day Week								
Min-max calories (kcal) [i, j]	350-500	400-500	400-550	450-600	550-650	600-650	600-700	750-850
Saturated fat (% of total calories) [i, j]	< 10	< 10	< 10	< 10	< 10	< 10	< 10	< 10
Daily Sodium Restrictions (mg) [i, m]	≤ 540	≤540	≤ 600	≤ 640	≤ 1230	≤1230	≤ 1360	≤ 1420
Trans fat [i]	Nutrition label or manufacturer specifications must indicate zero grams of trans fat per serving.							

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Production Records Overview

- USDA requirement for the National School Lunch Program, School Breakfast Program and Afterschool Snack Program.
- Provides documentation that meals planned were actually served.
- Identifies information needed when conducting the nutrient analysis.
- Ensures that requirements for the meal pattern components are met.
- Serve as a communication tool and daily "to do" list for staff.

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Benefits of Production Records

- An excellent planning and forecasting tool for a successful food service operation.
- Provides a written history that can be used to evaluate customer preference and improve menu planning:
  - Minimizes overproduction and food waste; and
  - Identifies trends and tracks participation.
- Provides a daily written history of the foods planned, prepared and served.
- Documents crediting and provides data needed for nutrient analysis.

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Production Records: Basics

- Who is responsible for completion of the production record?
  - Menu planner
  - Production staff
  - Meal servers
- When should production records be completed?
  - Majority is completed prior to the day of meal service.
  - Remainder is completed on the day of meal service.

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Production Records: Basics

- Where should daily production records be kept?
  - In a location where staff can easily refer to and complete as necessary.
- How long must production records be kept on file?
  - For three years plus the current school year.

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Format of Production Records

Formats vary but should include:

- Site name, date, meal, and menu type
- Age/grade group to be served
- Meals planned and served
  - Reimbursable
  - Non-reimbursable (i.e., adult, a la carte, etc.)
- All planned menu items, including condiments and extras
- Standardized recipe name and number, and/or product name and description
- Portion or serving sizes by grade group

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Format of Production Records

Formats vary but should include (cont.):

- Planned number of reimbursable servings
- Total projected servings (reimbursable + non-reimbursable)
- Contribution to the meal components
- Total servings produced
- Number of reimbursable servings and non-reimbursable servings actually served
- Amount leftover
- Substitutions

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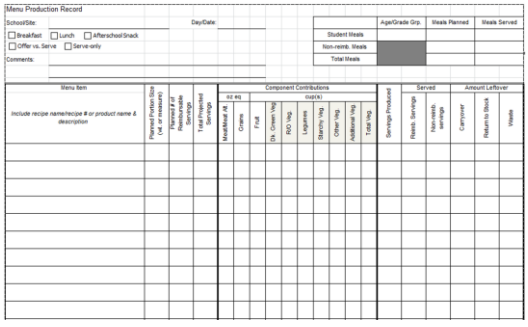
PDE Production Record Template



Menu Production Record

School/Site: Day/Date:

☐ Breakfast ☐ Lunch ☐ Afterschool Snack

☐ Offer vs. Serve ☐ Serve-only

Comments:

	Age/Grade Grp.	Meals Planned	Meals Served
Student Meals			
Non-reimb. Meals			
Total Meals			

Menu Item				Component Contributions (oz eq / M/E/N)										Served	Amount Leftover		
Include recipe name/recipe # or product name & description	Planned Portion Size (wt. or measure)	Planned # of Reimbursable Servings	Total Projected Servings	Meat/Meat Alt.	Grains	Fruit	Dk. Green Veg.	RO Veg.	Legumes	Starchy Veg.	Other Veg.	Additional Veg.	Total Veg.	Servings Produced	Reimb. Servings	Non-reimb. servings	Carryover	Return to Stock	Waste

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PDE Production Record: Before the Meal

General Information Section

- Site/school name
- Date
- Meal type checkbox
  - Breakfast
  - Lunch
  - Afterschool Snack
- Offer vs. serve or serve-only checkbox
- Comments section

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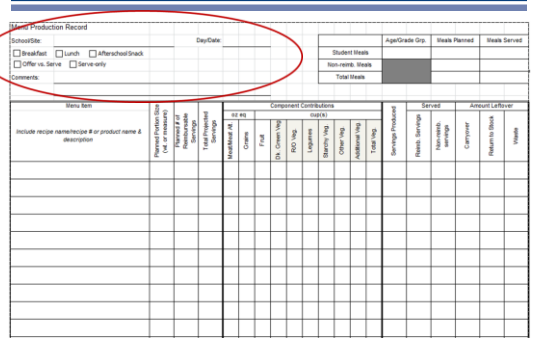
PDE Production Record: Before the Meal


Menu Production Record
School/Site:
Day/Date:
Breakfast Lunch Afterschool Snack
Offer vs. Serve Serve-only
Comments:

	Age/Grade Grp.	Meals Planned	Meals Served
Student Meals			
Non-reimb. Meals			
Total Meals			

Menu Item	Planned Portion Size (wt. or measure)	Planned # of Reimbursable Servings	Total Projected Servings	Component Contributions oz eq	Component Contributions cup(s)								Served	Amount Leftover		
Include recipe name/recipe # or product name & description				Meat/Meat Alt.	Grains	Fruit	Dk. Green Veg.	RO Veg.	Legumes	Starchy Veg.	Other Veg.	Additional Veg.	Total Veg.	Servings Produced	Reimb. Servings	Non-reimb. servings	Carryover	Returns to Stock	Waste

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PDE Production Record: Before the Meal

Meals Planned and Served Section

- Indicate age/grade group.
- Fill in the planned number of meals prior to meal service:
  - Student meals (reimbursable);
  - Non-reimbursable meals (adult, a la carte, dropped trays, etc.); and
  - Total meals = student meals + non-reimbursable meals.
- After meal service, fill in meals served for each category.

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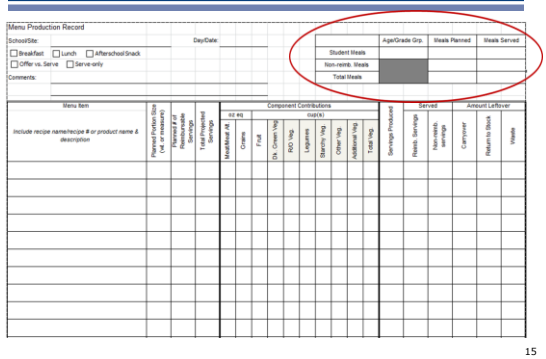
PDE Production Record: Before the Meal


Menu Production Record
School/Site:
Day/Date:
Breakfast Lunch Afterschool Snack
Offer vs. Serve Serve-only
Comments:

	Age/Grade Grp.	Meals Planned	Meals Served
Student Meals			
Non-reimb. Meals			
Total Meals			

Menu Item	Planned Portion Size (wt. or measure)	Planned # of Reimbursable Servings	Total Projected Servings	Component Contributions oz eq	Component Contributions cup(s)								Served	Amount Leftover		
Include recipe name/recipe # or product name & description				Meat/Meat Alt.	Grains	Fruit	Dk. Green Veg.	RO Veg.	Legumes	Starchy Veg.	Other Veg.	Additional Veg.	Total Veg.	Servings Produced	Reimb. Servings	Non-reimb. servings	Carryover	Returns to Stock	Waste

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PDE Production Record: Before the Meal

Menu Item Column

- Enter each menu item in the reimbursable meal.
  - Include all menu choices available.
  - Example: Student can choose shepherd's pie or PB&J.
- Menu items with more than one ingredient/component.
  - Enter in only one row and include standardized recipe or product information.
    - PB&J (grain and meat alternate)
    - Shepherd's pie (starchy vegetable and meat)

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PDE Production Record: Before the Meal

Menu Item Column (cont.)

- Be as specific as possible!
- Examples:
  - Local recipe name/number
  - PrimeroEdge recipe name/number
  - USDA recipe name/number
  - USDA foods
  - Brand name
  - Include form of item, if applicable:
    - "canned in light syrup, drained"
    - "raw, shredded"

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PDE Production Record: Before the Meal

Menu Item Column (cont.)

- Menu items and recipes need to be updated when products change.
- Remember to keep your labels for all menu items!
- "PDE shared" menu items in PrimeroEdge are maintained in the system and updated as changes occur.

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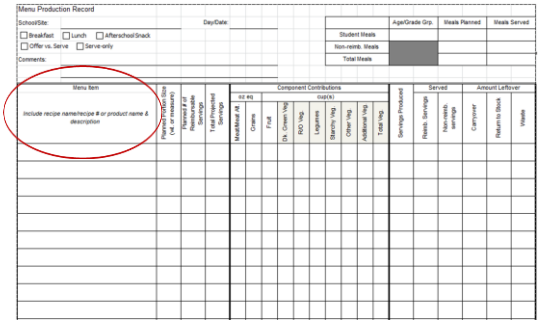
PDE Production Record: Before the Meal



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PDE Production Record: Before the Meal

Portions and Servings Columns

- **Planned Portion Size**
  - Number (“one sandwich”)
  - Volume or weight (“½ cup” or “3 oz patty”)
- **Planned Number of Reimbursable Servings**
  - *This column must be used when conducting your nutrient analysis!*
  - Menu planner must look at historical student preferences when planning reimbursable servings.
- **Total Projected Servings**
  - Planned reimbursable + non-reimbursable

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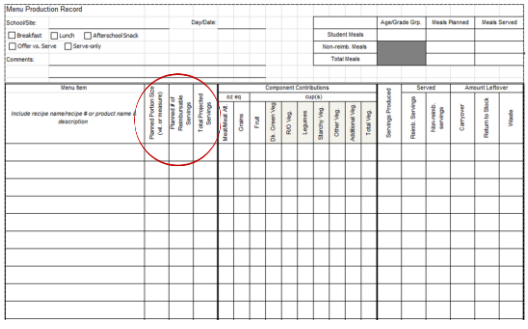
PDE Production Record: Before the Meal



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PDE Production Record: Before the Meal

Component Contributions Column

- Menu planner indicates how each menu item credits to the meal pattern.
- **Meat/Meat Alternate** and **Grains** are credited as ounce equivalents (oz eq).
  - Minimum creditable amount is 0.25 oz eq.
  - Example: a 3 oz fish patty credits as 2 oz eq meat (CN label).
- **Fruits** and **Vegetables** are credited by volume.
  - Minimum creditable amount is 1/8 cup.
  - Vegetable subgroups are included.

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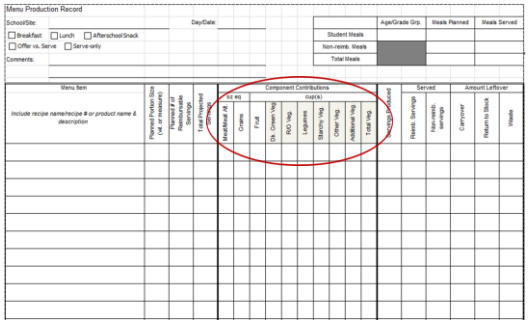
PDE Production Record: Before the Meal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☐ Offer vs. Serve ☐ Serve-only

Comments:

	Age/Grade Grp.	Meals Planned	Meals Served
Student Meals			
Non-reimb. Meals			
Total Meals			

Menu Item	Planned Portion Size (wt. or measure)	Planned # of Reimbursable Servings	Total Projected Servings	Component Contributions (oz eq / cups)									Servings Produced	Served		Amount Leftover		
				Meat/Meat Alt.	Grains	Fruit	Dk. Green Veg.	RO Veg.	Legumes	Starchy Veg.	Other Veg.	Additional Veg.	Total Veg.		Reimb. Servings	Non-reimb. servings	Carryover	Return to Stock	Waste
Include recipe name/recipe # or product name & description																		

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PDE Production Record: Day of Service

Servings Produced Column

- Indicate the number of servings produced (i.e. placed on the line) for each menu item.

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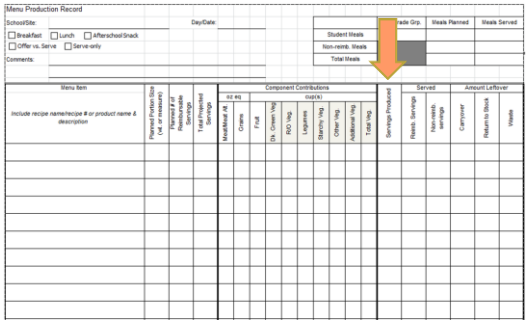
PDE Production Record: Day of Service



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PDE Production Record: After Meal Service

Served Columns

- **Reimbursable Servings**
  - Enter the amount of reimbursable servings that were actually served for each menu item.
- **Non-reimbursable Servings**
  - Enter the amount of non-reimbursable servings (i.e. adult meals, a la carte purchases, etc.) that were actually served for each menu item.
- Complete **Meals Served** section in chart at top.

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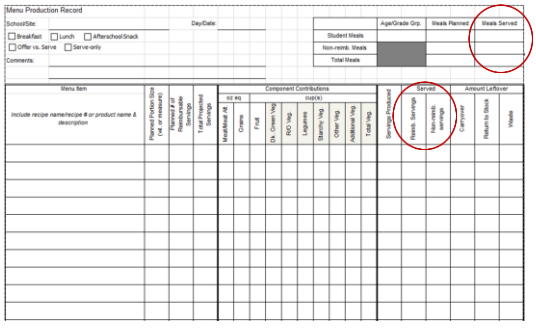
PDE Production Record: After Meal Service



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PDE Production Record: After Meal Service

Amount Leftover Columns

- **Carryover**
  - Enter the amount of that menu item that will be served at upcoming meal.
- **Return to Stock**
  - Enter the amount that was returned to stock.
- **Waste**
  - Enter the amount that was thrown away.

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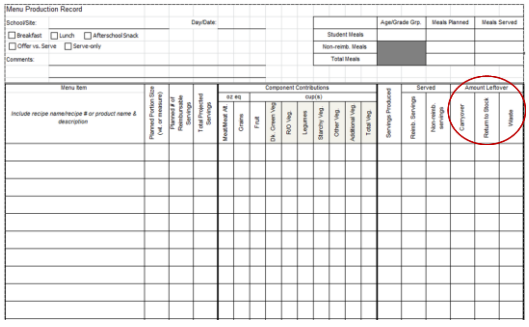
PDE Production Record: After Meal Service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Non-reimb. Meals			
Total Meals			

Menu Item	Planned Portion Size (wt. or measure)	Planned # of Reimbursable Servings	Total Projected Servings	Component Contributions (oz eq)									Served		Amount Leftover		
Include recipe name/recipe # or product name & description				Meat/Meat Alt.	Grains	Fruit	Dk. Green Veg.	RO. Veg.	Legumes	Starchy Veg.	Other Veg.	Additional Veg.	Total Veg.	Servings Produced	Reimb. Servings	Non-reimb. servings	Carryover	Return to Stock	Waste

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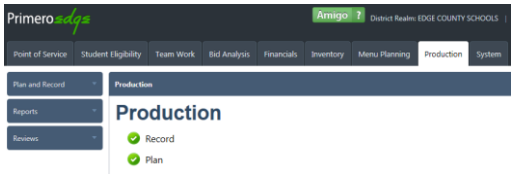
Production Records on PrimeroEdge



PrimeroEdge website: www.paschoolmealsses.com

For technical assistance contact CN Resource:
pahelp@cnresource.com
1-855-286-7685

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Standardized Recipes

- Required for menu items with more than one ingredient.
- Include preparation instructions for consistent quality and predictable yield.
- Indicate proper portioning and crediting of meal components.
- Help control food costs.
- Include Hazard Analysis and Critical Control Points (HACCP) process information for food safety.
- Provide consistency for customer satisfaction.

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Standardized Recipes: Example

Chicken Alfredo With a Twist

Meal Components: Meat/Meat Alternate-Grains — **Main Dishes D-54r**

Ingredients	50 Servings		100 Servings		Directions Process #2: Same Day Service
	Weight	Measure	Weight	Measure	
Water		6 gal		12 gal	1. Heat water to a rolling boil.
Rotini pasta, whole-grain, dry	4 lb	5 qt 1 ½ cups	8 lb	2 gal 2 ¾ qt	2. Slowly add pasta. Stir constantly, until water boils again. Cook about 8 minutes or until al dente; stir occasionally. DO NOT OVERCOOK. Drain well. 3. Pour into steam table pans (12" x 20" x 4"). For 50 servings, use 2 pans. For 100 servings, use 4 pans. Critical Control Point: Hold pasta at 135 °F or higher.
Low-fat, reduced-sodium cream of chicken soup, condensed	9 lb 6 oz	1 gal ¾ qt (3 No. 3 cans)	18 lb 12 oz	2 gal 1 ½ qt (6 No. 3 cans)	4. Combine soup, half and half, pepper, garlic, Parmesan cheese, and chicken. Cook over medium heat for 5-10 minutes, stirring often. Critical Control Point: Heat to 165 °F or higher for at least 15 seconds.
Fat-free half and half		3 qt		1 gal 2 qt	
Ground white pepper		2 tsp		1 Tbsp 1 tsp	
Garlic powder		1 tsp		2 tsp	
Parmesan cheese, grated	1 lb 1 oz	1 ½ qt	2 lb 2 oz	3 qt	
Frozen, cooked diced chicken, thawed, ½" pieces	6 lb 8 oz	1 gal 1 ¼ qt	13 lb	2 gal 2 ½ qt	
					5. Combine noodles and sauce immediately before serving.
					6. Critical Control Point: Hold for hot service at 135 °F or higher.
					7. Portion with 8 fl oz spoodle (1 cup).

The grain ingredients used in this recipe must meet the Food and Nutrition Service whole grain-rich criteria.

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Standardized Recipes Include:

- Recipe Header
  - Title – *Chicken Alfredo with a Twist*
  - Credited Food Components – *Meat/meat alternate and grains*
  - Category – *Main Dish*
- Ingredients
  - One ingredient per line
  - Form – *dry, condensed, grated, frozen*
  - Weight and Measure – *gallon, pound, quart, ounces, teaspoon*

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Standardized Recipes Include:

- Directions
  - Step-by-step, detailed – *stir constantly, drain well, cook over medium heat*
  - Includes Critical Control Points – *hold pasta at 135 degrees or higher*
- Portion Size – *8 fl oz spoodle (1 cup)*
- Yield – *50 servings: about 26 lb 8 oz*
- Crediting and Nutrients per Serving – *2 ¼ oz eq meat and 1¼ oz eq grains*

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Standardized Recipes: Customize Servings

Chicken Alfredo With a Twist

Meal Components: Meat/Meat Alternate-Grains **Main Dishes D-54r**

Ingredients	50 Servings		100 Servings		Directions Process #2: Same Day Service
	Weight	Measure	Weight	Measure	
Water		6 gal		12 gal	1. Heat water to a rolling boil.
Rotini pasta, whole-grain, dry	4 lb	5 qt 1 ½ cups	8 lb	2 gal 2 ¾ qt	2. Slowly add pasta. Stir constantly, until water boils again. Cook about 8 minutes or until al dente; stir occasionally. DO NOT OVERCOOK. Drain well. 3. Pour into steam table pans (12" x 20" x 4"). For 50 servings, use 2 pans. For 100 servings, use 4 pans. Critical Control Point: Hold pasta at 135 °F or higher.
Low-fat, reduced-sodium cream of chicken soup, condensed	9 lb 6 oz	1 gal ¾ qt (3 No. 3 cans)	18 lb 12 oz	2 gal 1 ½ qt (6 No. 3 cans)	4. Combine soup, half and half, pepper, garlic, Parmesan cheese, and chicken. Cook over medium heat for 5-10 minutes, stirring often. Critical Control Point: Heat to 165 °F or higher for at least 15 seconds.
Fat-free half and half		3 qt		1 gal 2 qt	
Ground white pepper		2 tsp		1 Tbsp 1 tsp	
Garlic powder		1 tsp		2 tsp	
Parmesan cheese, grated	1 lb 1 oz	1 ½ qt	2 lb 2 oz	3 qt	
Frozen, cooked diced chicken, thawed, ½" pieces	6 lb 8 oz	1 gal 1 ¼ qt	13 lb	2 gal 2 ½ qt	
					5. Combine noodles and sauce immediately before serving.
					6. Critical Control Point: Hold for hot service at 135 °F or higher.
					7. Portion with 8 fl oz spoodle (1 cup).

The grain ingredients used in this recipe must meet the Food and Nutrition Service whole grain-rich criteria.

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Customize Servings Using Factor Method

- Determine the multiplying factor:

  $$\frac{\text{Number of servings you want}}{\text{Number of servings in recipe}} = \text{Multiplying factor}$$

- Example: 85 servings of Chicken Alfredo with a Twist

  $$\frac{85 \text{ servings}}{50 \text{ servings}} = 1.7 \text{ multiplying factor}$$

- Calculate each ingredient separately.

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Customize Servings Using Factor Method

- Change the original weight into one unit of measure.

Example: Chicken Alfredo with a Twist
Frozen, cooked diced chicken, thawed, ½" pieces, 6 lb 8 oz

6 lb x 16 oz/lb = 96 oz
+ 8 oz
Total 104 oz chicken in 50 servings

Original amount x multiplying factor = Adjusted amount
104 oz x 1.7 = 176.8 oz (or 11 lbs) chicken in 85 servings

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Customize Servings Using Factor Method

- Change the original volume into one unit of measure.

Example: Chicken Alfredo with a Twist
Low-fat, reduced-sodium cream of chicken soup, condensed:
1 gal ¾ qt

1 gal = 4 qt
+ ¾ qt
Total 4 ¾ qt condensed soup in 50 servings

Original amount x multiplying factor = Adjusted amount
4 ¾ qt x 1.7 = 8.08 qt (or 2 gallons) soup in 85 servings

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Weight and Volume Measures

- Common **volume** measures include:
  - Teaspoon (tsp)
  - Tablespoon (Tbsp)
  - Cup (C)
  - Fluid Ounce (fl oz)
  - Gallon (gal)
  - Quart (qt)
  - "x No. 3 cans"
  - Spoodles
- Common **weight** measures include:
  - Pound (lb)
  - Ounce (oz)
  - Gram (g)

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Weight and Volume Measures: Resource

http://www.nfsmi.org/documentlibraryfiles/pdf/20081006054447.pdf

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Weight and Volume Measures

- Frequent source of confusion in school nutrition:
  - **Fluid ounces** (fl oz) measure *volume* (ex: 4 fl oz = ½ cup).
  - **Ounces** (oz) measure *weight* (ex: 4 oz = ¼ lb).
- Manufacturers package foods by weight, not volume.
  - Menu planners must pay attention to pre-packaged fruits and vegetables for crediting.
    - Example: 4 oz prepackaged applesauce ≠ ½ cup (4 fl oz) of applesauce.
  - See PDE's "Crediting of Fruits and Vegetables Memo" on PEARS Download Forms→PDE-SNP-703 (https://www.pears.ed.state.pa.us/snp/)

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Child Nutrition (CN) Labels

- Voluntary federal labeling program that clearly identifies contribution toward meal pattern requirements.
- Products with CN label include main dish products that contribute to meat/meat alternate component of meal pattern.
- CN labels provide contributions for all components in product.
- "Gold standard" for verifying crediting of menu items.

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Child Nutrition (CN) Labels

- CN logo with distinct border
- Meal pattern contribution statement
- Six-digit product identification number
- USDA Food and Nutrition Service (FNS) authorized statement with month and year of FNS approval

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Child Nutrition (CN) Labels

- Valid and acceptable documentation for CN label includes:
  - Original CN label from product carton
  - Photocopy of CN label shown attached to original product carton
  - Photograph of CN label shown attached to original product carton
  - Watermarked CN label (electronic or hard copy from vendor) with bill of lading (invoice) containing product name

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Product Formulation Statement (PFS)

- Used to verify crediting when acceptable CN label is not available for product.
- Program operators may request a signed Product Formulation Statement (PFS) on manufacturer's letterhead that shows how processed product contributes to meal pattern requirements.
- Review PFS prior to purchasing processed product.

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Product Formulation Statement (PFS)

- USDA reviewer's checklist for meat/meat alternates: http://www.fns.usda.gov/sites/default/files/reviewer_checklist.pdf
- Verify the creditable oz eq of meat/meat alternate is not greater than the total weight of the edible portion of the product.
- Links for PFS templates and samples: http://www.fns.usda.gov/cnlabeling/food-manufacturersindustry
- PDE-SNP-140 on PEARS: Updated PDE/USDA guidance on CN Label and PFS documentation (https://www.pears.ed.state.pa.us/snp/)

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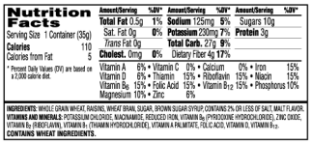
Nutrition Facts and Ingredients Labels

- Maintain for all commercially-prepared items.
- Necessary for nutrient analysis of menus.
- Required to validate whole grain-rich requirements.



Nutrition Facts

Serving Size 1 Container (35g)
Calories 110
Calories from Fat 5

Amount/Serving	%DV*	Amount/Serving	%DV*	Amount/Serving	%DV*
Total Fat 0.5g	1%	**Sodium** 125mg	5%	Sugars 10g	
Sat. Fat 0g	0%	**Potassium** 250mg	7%	**Protein** 3g	
Trans Fat 0g		**Total Carb.** 27g	9%		
Cholest. 0mg	0%	Dietary Fiber 4g	17%		

Vitamin A	6%	• Vitamin C	0%	• Calcium	0%	• Iron	15%
Vitamin D	6%	• Thiamin	15%	• Riboflavin	15%	• Niacin	15%
Vitamin B_6	15%	• Folic Acid	15%	• Vitamin B_{12}	15%	• Phosphorus	10%
Magnesium	10%	• Zinc	6%				

* Percent Daily Values (DV) are based on a 2,000 calorie diet.

INGREDIENTS: WHOLE GRAIN WHEAT, RAISINS, WHEAT BRAN, SUGAR, BROWN SUGAR SYRUP, CONTAINS 2% OR LESS OF SALT, MALT FLAVOR, **VITAMINS AND MINERALS:** POTASSIUM CHLORIDE, NIACINAMIDE, REDUCED IRON, VITAMIN B_6 (PYRIDOXINE HYDROCHLORIDE), ZINC OXIDE, VITAMIN B_2 (RIBOFLAVIN), VITAMIN B_1 (THIAMIN HYDROCHLORIDE), VITAMIN A PALMITATE, FOLIC ACID, VITAMIN D, VITAMIN B_{12}. **CONTAINS WHEAT INGREDIENTS.**

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Menu Planning Steps for Success

- Plan menus well in advance.
- Use a variety of reliable menu resources.
- Analyze menus for compliance before serving to students.
- Decide if you want to offer choices and how many.
- Balance higher calorie foods with lower calorie foods.
- Use production records to fine-tune planned meals and reanalyze when planned and actual meals are very different.
- Consider visual appeal and color.

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Use Reliable Crediting and Menu Resources

- Meal Pattern Chart: PDE721 on PEARS, Download Forms https://www.pears.ed.state.pa.us/snp/
- USDA Q & A memo SP10-2010 (v9): http://www.fns.usda.gov/sites/default/files/cn/SP10-2012v9os2.pdf
- Food Buying Guide for School Meal Programs: http://www.fns.usda.gov/tn/food-buying-guide-school-meal-programs

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Use Reliable Crediting and Menu Resources

- Offer vs. Serve Manual: http://www.fns.usda.gov/sites/default/files/cn/SP41_2015a.pdf
- USDA Food Fact Sheets: http://www.fns.usda.gov/fdd/nslp-usda-foods-fact-sheets
- Whole Grain Resource: http://www.fns.usda.gov/sites/default/files/WholeGrainResource.pdf

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Use Reliable Crediting and Menu Resources

- USDA Recipes for Schools: http://www.nfsmi.org/Templates/TemplateDefault.aspx?qs=cElEPTEwMiZpc01ncj10cnVl
- USDA Recipes for Healthy Kids Cookbook for Schools: http://www.whatscooking.fns.usda.gov/sites/default/files/featuredlinks/cookbookforschools.pdf

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For more information on the school nutrition programs please visit PDE's website at www.education.pa.gov

The mission of the department is to academically prepare children and adults to succeed as productive citizens. The department seeks to ensure that the technical support, resources and opportunities are in place for all students, whether children or adults, to receive a high quality education.

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