

APPENDIX U

CHECKLIST OF DOCUMENTS NEEDED FOR AN SMI REVIEW

School Name:	Period of Analysis:	
Source Documents	Complete	Additional Data Needed
Menus (for the school week being reviewed)		
Choices indicated		
Menu changes or substitutions indicated (dated)		
Production Records (for the school week being reviewed)		
Site name, meal date, and menu type (breakfast or lunch)		
Forecasted number of meals by age/grade group		
All planned menu items, including milk types and desserts		
All condiments used as a complement to the reimbursable meal (e.g., mustard, salad dressing, margarine, etc.)		
Recipes or food products used including form of food (e.g., canned, frozen, dried, halves, slices, etc.)		
Brand names and product code numbers of commercially processed foods		
Serving sizes for each age/grade group of each menu item or food item served, including condiments		
Number of portions planned for each menu item, by age/grade group		
Total amount of food prepared for the planned number of servings (e.g., number of servings, pounds, cans, etc.)		
Number of leftovers and substitutions (serving size or portion amount)		
Number of portions and serving sizes for adult meals		
Number of reimbursable meals served (for each age/grade group)		
Number of planned a la carte items (if recorded on production records)		
Number of meals served that contain substituted foods in order to accommodate special dietary needs (if applicable)		
Recipes (for any menu item indicated on production records that contains more than one ingredient)		
Yield (includes serving size and number of servings)		
List all ingredients; including form, packing medium, and fat content		
Correct measures, weights and/or pack size		
Include preparation procedures		

Checklist of Documents Needed for an SMI Review (continued)

School Name:	Period of Analysis:	
Source Documents	Complete	Additional Data Needed
Nutrition/food component information for commercially processed food items		
Nutrition Facts label or equivalent information from manufacturer		
Child Nutrition (CN) labels and/or Product Formulation Statements if using a food-based menu planning approach		
Printout of nutrient analysis for review week of menus and recipes (required for NSMP/ANSMP)		
Indication that re-analysis is warranted	<input type="checkbox"/> Yes <input type="checkbox"/> No	