



School Nutrition Programs (SNP) Annual Checklist School Year 2026-2027

Montana Office of Public Instruction

This checklist outlines the annual tasks required to maintain compliance with USDA school nutrition programs. The role assignments listed below are **suggested only**. It is highly recommended that you explicitly verify who is responsible for each item within your team at the beginning of the school year (SY).

Viewing a printed copy? You can access all active links by viewing the digital version of this checklist at:
<https://opi.mt.gov/Leadership/Management-Operations/School-Nutrition/>

Retention Rule: All USDA school nutrition programs documentation, especially for items listed below, must be kept on file for three SYs plus the current year.

General and Shared Tasks

Task	Deadline	Documentation Required	Resources	Completed?
Daily and Ongoing Routine Tasks				
Daily Meal Counts: Complete and record meal counts at each meal service.	Daily	Meal counts from each day of service.	Meal Counting & Claiming Guidance	
Civil Rights Training: Conduct and document required Civil Rights training with all program staff, annually and as new staff are hired.	Annually; Ongoing	Civil Rights training log.	Civil Rights Training Video Civil Rights Training Documentation	
Nondiscrimination Statement (NDS): Verify the NDS language is available on program materials and website.	Ongoing	Present on all program materials.	Nondiscrimination Statement	
School Breakfast Program (SBP) Outreach: Promote and conduct outreach for SBP (i.e., mail menus, post schedules, etc.)	Beginning of SY; Ongoing	Copy of outreach provided.		
Buy American Cost Tracking: Monitor and document all non-domestic food purchases, ensuring they do not exceed 10% of total annual food costs (SY26-27).	Annually, Ongoing	Buy American threshold tracker.	Buy American Threshold Tracker USDA Version	
Annual or As Needed Tasks				
Complete Annual Application: Update and submit the SY 27-28 in MAPS.	April 1st - June 30th	Claim Contact to Record in MAPS.	MAPS Login - Applications - Application Packet	
CEP Participation Election: Finalize decision of participation in CEP. Submit CEP Schedule in Annual Application.	April 1st - June 30th	Claim Contact to Record in MAPS.	Community Eligibility Provision OPI Webpage	
Fresh Fruit and Vegetable Program (FFVP) Application (If Planning to Operate): Submit application packet and Signature Page. Claim Contact has edit access. Complete annual FFVP training if SFA is operating the FFVP.	April 1st - June 30th Beginning of the SY; As needed	Claim Contact to Record in MAPS. Training log.	Fresh Fruit and Vegetable Program Webpage Training can be found on the MT OPI's Continuing Education Calendar . Recordings of MT OPI's Webinars- FFVP Specific Materials .	
Summer Food Service Program (SFSP) Application, Training, & Other Requirements: Outlined in the SFSP checklist.	By mid-May	Recorded in MAPS, OPI Learning Hub, etc.	Summer Food Service Program Webpage SFSP Annual Checklist	

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Summer Food Service Program (SFSP) Outreach: Distribute materials to inform families of the availability and location of free SFSP site(s). Must provide notification even if SFA is <i>not</i> a program operator.	By the end of the SY	Copy of notification materials provided.	Summer Food Service Program Promotional Materials	
Public Release: Submit a public release about the availability of SNPs. OPI submits for public institutions.	Beginning of the SY	Copy of public release or OPI's version.	OPI Public Release	
Food Safety Inspection Report: Report the number of inspections received in previous SY25-26 in MAPS.	November 10 th , 2026	Claim Contact to Record in MAPS.	MAPS Login - Applications - Food Safety Inspections	
On Site Meal Counting and Claiming Review: Conduct review of the meal counting and claiming system for breakfast and lunch at all program sites.	Beginning of SY, By February 1st	Review form.	On Site Meal Counting and Claiming Self-Review Form Template	
Policy Review: Review all SNP related policies for required language and provisions: • Procurement Policy or Procedure for Food Service (8210) • Unpaid Meal Charge Policy (8205) • School Wellness Policy (2510)	Annually; As needed	Copy of current policies.	Procurement Resources Procurement Policy Template School Wellness Policy Self-Review & Checklist Model School Wellness Policy MT Model School Wellness Policy Unpaid Meal Charge Policy Template	
Wellness Policy Triennial Assessment: Complete an assessment of the wellness policy (<i>not</i> a policy review) once every three years. Share assessment results directly with the public (i.e., school website, newsletter, mailed out, etc.).	As needed	Copy of completed triennial assessment. Copy of where the results were shared.	Wellness Policy Triennial Assessment Form	
Civil Rights Complaint Procedure for School Nutrition Programs Review: Must include procedures as outlined in USDA guidance.	Annually	Keep a copy of the local SNP Civil Rights Complaint procedure on file.	Civil Rights Complaint Procedure	
After School Snack Program (ASP) Training (If Planning to Operate): Complete training if SFA is operating the ASP.	Beginning of the SY; As needed	Training log.	Training found on the MT OPI's Continuing Education Calendar. Recordings of MT OPI's Webinars - ASP Specific Materials .	
After School Snack Program (ASP) Reviews (If Operating): • Conduct first program review (within first 4 weeks of operation) • Conduct second program review (by the end of the SY)	During first 4 weeks; By the end of the SY	Review form.	ASP Self Review Form Template	
Food Service Management Company (FSMC) Timeline: If contracting with FSMC, stay current on the FSMC procurement process.	Annually	As specified in the checklist.	FSMC Timeline and Checklist	

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Food Service Director (FSD) & Food Service Professionals

Task	Deadline	Documentation Required	Resources	Completed?
Daily and Ongoing Routine Tasks				
Production Records: Complete kitchen production records daily.	Daily	Production records.	Production Record Templates	
Food Safety: Complete daily logs including cooking temperatures, refrigeration and storage logs, etc. HACCP: Review food safety plan, SOPs	Daily Ongoing	Miscellaneous Logs/Records. Maintain on File in each Kitchen	Food Safety Resources and Logs Montana HACCP Plan Template	
Menu Compliance: Develop menus aligned with USDA meal pattern standards. Verify that daily and weekly minimum quantities for all five food components, including specific vegetable subgroups, are explicitly planned and documented prior to service.	Ongoing	Copies of menus. Production records.	School Meal Programs OPI Webpage	
Procurement & Buy American Tracking: Review purchasing thresholds to maintain compliance within the procurement process. Verify and maintain original Child Nutrition (CN) labels or official Product Formulation Statements (PFS) on file for all commercial processed, multi-ingredient foods to ensure proper component crediting. Maintain continuous documentation of non-domestic food items for exemptions and utilize a tracker to ensure exceptions remain under the 10% annual cost cap (SY26-27) unless officially approved.	Ongoing	Procurement Procedures/Policy, invoices, orders, price comparison, bids, etc. CN labels, PFS. Buy American threshold tracker.	Procurement OPI Webpage Buy American Threshold Tracker USDA Version Buy American Exemption Form	
Smart Snacks: Ensure all items sold outside the reimbursable meal <i>during</i> the school day (a la carte, vending machines, coffee carts, etc.) meet requirements.	Ongoing	Eligible snacks at each site.	A Guide to Smart Snacks Smart Snacks Product Calculator	
Dietary Accommodations: Track, verify, and implement valid medical statements for student food allergies and/or disabilities. Review fluid milk substitutions; ensure any non-dairy milk served without a doctor's note or identified necessary specification is an approved substitute.	Ongoing	Medical statements. Approved substitutes served on site.	Medical Statement Template USDAs Accommodating Disabilities in the SNPs Milk Substitution Requirements	

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Annual or As Needed Tasks				
Professional Standards: Complete and track required training hours (Director: 12 hrs. Manager: 10 hr. FT: 6 hrs. PT: 4 hrs.) Complete required training in the focus areas of: - Procurement - Food Allergy/Disability	Annually	Training logs and/or certificates. Specific training listed on documentation.	Training Log Template Training can be found on the MT OPI's Continuing Education Calendar . Recordings of MT OPI's Webinars	
Sanitation Inspections: Request 2 inspections via email/letter to local sanitarian(s). If received, keep inspections on file <i>and</i> post publicly, where students/staff/etc. can see.	Annually	Proof of request; letter or email. Sanitation inspection reports.	Sanitation Inspection Letter Template Find Your County Sanitarian	
USDA Foods Survey: Submit the annual survey, consider the need to designate funds to DoD Fresh. Submit in MAPS.	February	Food Service Director to Record in MAPS.	MAPS Login - Food Distribution Program Tile (yellow) - Agencies - Surveys	
Food Protection Manager Training: Typically expires every 5 years. The FSD and any site manager is required to have a valid certificate on file.	Within 30 days of hire & keep it current	Certification document	Options for Food Protection Manager Training	
Required Signage: Ensure the following posters are displayed prominently to program participants; - And Justice for All Poster - Offer vs Serve Breakfast and Lunch Posters	As needed	Physically posted at each meal site	Poster Order Form	
Non-Program Foods Revenue Tool: Assess the need to complete the NPRT. Highly recommend working with the Business Clerk to complete this tool.	Beginning of SY	Documentation of completed NPRT.	Non-Program Revenue Non-Program Revenue FAQ Non-Program Revenue Tool	

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Determining Official

Task	Deadline	Documentation Required	Resources	Completed?
Daily and Ongoing Routine Tasks				
Direct Certification Application (DCA): Complete the following steps in the DCA system: 1. Work the Extended Eligibility and Potential Matches list. 2. Pull the direct certification reports* 3. Mail the direct certification notification letters to households* 4. Update the direct certification benefit status into the POS* 5. Repeat, recommended at least monthly, throughout the school year.	Ongoing; at a minimum (beginning of SY, 3 months into SY; 6 months into SY)	DCA system. DCA system. Copies of letters sent. Up-to-date POS.	DCA Login - Reports - Direct Certification Report DCA Login - Students - Extended Eligibility Candidates; Potential Matches Mail: Notification Letters - Notice of Direct Certification OR Find in DCA under Reports - Direct Certification Letter (must physically mail out but they are pre-populated letters).	
Private Schools: Upload Non-OPI-Accredited School Students to Match Eligible Programs in DCA - If any students are found directly certified in DCA, follow step 3 through 5 above.	Beginning of SY and ongoing	DCA system.	DCA Login Instructions for Private School Student Match in DCA.	
*Free and Reduced (F/R) Applications: Distribute paper or electronic F/R applications (Using OPI's Online FRAPP is highly encouraged). 1. Approve/deny submitted applications. 2. Update benefit statuses into the POS. 3. Mail or email notification letters to households. Review, process, determine, and notify families of eligibility for all submitted paper or electronic applications within 10 operating days of receipt.	Ongoing Process w/in 10 days of receiving	Applications submitted. Up-to-date POS. Copies of letters sent.	Eligibility Manual DCA Login - Online FRAPP opt-in found under Sponsor tab - ✓ by Use Online Free/Reduced Applications FRAPP User Manual Meal Eligibility OPI Webpage Mail: Notification Letters - Notification of Approval/Denial of Benefits Email: Online FRAPP notification - email icon within application after processing.	
Annual or As Needed Tasks				
*Eligibility Carryover: Extend previous SY F/R benefits for the first 30 days. If no new F/R status is received after 30 days, change status to paid.	30 <u>operating</u> days after the 1st school day	POS includes start dates of eligibility status.	Notification Letters - Notice of 30 Day Carryover Period Ending Soon	
CEP Eligibility & Identification: Review Identified Student Percentage (ISP) counts, corrections, etc.	April 1-15th	DCA system. Recorded in MAPS.	Community Eligibility Provision OPI Webpage	
Training: Complete job-specific training for the Determining Official role.	Annual	Training logs.	Training can be found on the MT OPI's Continuing Education Calendar Training Resources & Recordings	

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Verifying Official

Task	Deadline	Documentation Required	Resources	Completed?
Annual or As Needed Tasks				
*Select Households for Verification; Notify Households: 1. Identify required sample size (3% of approved applications). 2. Select applications to verify. Select Error Prone applications (w/in \$100 of eligibility) if required. Otherwise select applications at random. 3. Send out notification letters. 4. If no response, send out the required 2 nd notification.	Start On October 1st	Applications submitted. Error Prone indicated on applications. Copy of notification letter(s).	Verification OPI Webpage Verification Instructions Verification Application Tracker Verification Error-Prone Sponsors 2026-27 Eligibility Manual	
*Collect & Review Verification Documentation: Collect income documentation from chosen families. If documentation is not received after follow-up attempts have been made, the household eligibility must be changed to paid.	By November 15th	Income documentation. If not received, documentation of follow-up communication attempts.	Verification OPI Webpage Verification Instructions Eligibility Manual	
Submit Verification Report: Complete and submit Verification Report (FNS-742) in MAPS.	By November 30th	Claim Contact to Record in MAPS.	MAPS Login - Applications - Verification Report	
Training: Complete job-specific training for the Verifying Official role.	Annually	Training logs.	MT OPI's Continuing Education Calendar Verification Training	

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Business Clerk

Task	Deadline	Documentation Required	Resources	Completed?
Daily and Ongoing Routine Tasks				
Allowable Costs: Review purchases to ensure they are allowable within the nonprofit school food service account. Verify that any snacks or meals served outside of official reimbursable USDA programs are ordered using a separate account and paid for strictly with non-federal funding.	Ongoing	Receipts, purchase orders, invoices. Revenue and expenditure reports.	Procurement OPI Webpage	
Financial Tracking: Record all revenues and expenditures specifically to the nonprofit school food service account. Fund 12 Resource Management: Ensure the accounting system records expenditures for each vendor's payment. If paying a credit card/BMO/employee reimbursement – must note the actual vendor, where purchase was made from.	Ongoing	Revenue and expenditure reports. Maintain all receipts on file for each purchase.	OPI Chart of Accounts	
Procurement Procedures: Ensure procurement policies and procedures are being followed.	Ongoing	Procurement Policy/Procedure.	Procurement OPI Webpage	
*Student Account Balances: Monitor student meal account balances. Flag delinquent or unpaid balances. Follow procedures for remediation as specified in Unpaid Meal Charge Policy.	Ongoing	Unpaid Meal Charge Policy. If applicable, coverage of bad debt by non-federal funds.	Unpaid Meal Charge Policy Template Unpaid Meal Charges - Policy Guidance & Resources	
Annual or As Needed Tasks				
Adult Meals: Annually adjust adult meal prices based on OPI Memo. Code revenues under 1632. Free adult meals provided as an incentive must be tracked daily and reimbursed fully to the food service account using non-federal funds.	Beginning of the SY; Ongoing	Recorded in POS. Documentation within the revenue and expenditure reports.	OPI Chart of Accounts Adult Meal Price Memo	
Paid Lunch Equity (PLE) Tool: If applicable, the district will be notified to complete this. If so, complete the tool to determine student paid meal price adjustments.	Annually	Documentation of completed PLE Tool.	Paid Lunch Equity OPI Webpage	
Financial Report (ONLY for Private Schools or RCCIs): Complete and submit the Annual Financial Report.	By June 30th	Claim Contact to Record in MAPS.	MAPS Login - Applications - Financial Report	
Training: Complete job-specific training for the Business Clerk including Procurement training.	Annually	Training logs.	MT OPI's Continuing Education Calendar . Recordings of MT OPI's Webinars	

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Claim Contact

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Daily and Ongoing Routine Tasks				
Monthly Reimbursement Claims: Submit program claims, as applicable: NSLP, SBP, ASP, and/or FFVP in MAPS.	Ongoing; Monthly by the 10th	Recorded in MAPS. Documentation of meal counts, daily and consolidated, for NSLP, SBP, and ASP. Documentation of receipts, time tracking, etc. for FFVP.	MAPS Login - Claims How to Submit a Claim in MAPS Meal Counting & Claiming Guidance	
Meal Count Validation & Edit Checks: Before submitting monthly claims, conduct monthly Edit Checks by comparing daily meal counts against maximum attendance adjusted enrollment for each site.	Ongoing; Monthly at minimum	Documentation of meal counts, daily and consolidated, for NSLP, SBP, and ASP.	Manual Check: Daily/Monthly Claims Edit Check Electronic Check: In IC, find Edit Check Report	
Annual or As Needed Tasks				
Training: Complete job-specific training for the Claim Contact role.	Annually	Training logs.	Training can be found on the MT OPI's Continuing Education Calendar . Recordings of MT OPI's Webinars	
Update MAPS Application Packet & System Access: Keep application packet up to date with school contact information if staff changes for the following roles: - Authorized Rep - Food Service Director - Claim Contact - Determining Official - Verifying Official As needed, submit the User Access Request (UAR) forms to add/remove roles in the MAPS and DCA system so that new staff may access. Email completed forms to SNPInfo@mt.gov	As needed	MAPS Sponsor Application Contact Information	MAPS Login MAPS User Access Request Form DCA User Access Request Form	

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