TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

Administrative Review Process Manual for

CE ID

School Year 2022-2023

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Note to Contracting Entities

This manual will be utilized for information sharing between TDA and Contracting Entities (CE) having an Administrative Review (AR) during School Year (SY) 2022-2023. This includes due dates for the CE during the AR, required dietary and financial information, and additional instructions for the CE.

Requested written responses can be entered directly into this form-fillable Portable Document Format (PDF) document that can be uploaded into TX-UNPS. CEs can upload the entire manual or extract the completed forms into TX-UNPS Review Attachments (either way is acceptable).

Note that all other requested documentation required for the AR will be uploaded into TX-UNPS Review Attachments separate from this manual following file naming conventions described on page 21.

Please contact your assigned Administrative Review Specialist (ARS) if you have any questions.

Welcome to the Administrative Review Process

Thank you for partnering with the Texas Department of Agriculture (TDA) in ensuring Texas children have access to healthy meals!

Please use the links below to navigate to the resources page(s) on SquareMeals.org for the program(s) you operate. Review the updated policy documents and additional TDA resources to support your operations.

CHECK POLICY DOCUMENTS OFTEN, AS UPDATES ARE MADE CONTINUOUSLY.

Child and Adult Care Food Program: www.SquareMeals.org/CACFPResources
National School Lunch Program: www.SquareMeals.org/NSLPResources
Seamless Summer Option: www.SquareMeals.org/SummerResources
Summer Food Service Program: www.SquareMeals.org/SummerResources

For additional information contact your Education Service Center:
www.SquareMeals.org/ESC

Food and Nutrition Division
Nutrition Assistance Programs

TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

This product was funded by USDA.
This institution is an equal opportunity provider.

Updated 10/29/2020
www.SquareMeals.org

Bienvenidos al Proceso de Revisión Administrativa

¡Gracias por asociarse con el Departamento de Agricultura de Texas (TDA) para asegurar que los niños de Texas mantengan acceso a comidas saludables!

Por favor, use los enlaces ubicados más abajo para navegar la(s) página(s) de recursos en SquareMeals.org para el(los) programa(s) que operan. Revise los documentos actualizados sobre las políticas, y los recursos adicionales del TDA para apoyar sus operaciones.

REVISE A MENUDO LOS DOCUMENTOS SOBRE LAS POLÍTICAS, YA QUE SE HACEN ACTUALIZACIONES CONTINUAMENTE.

Child and Adult Care Food Program (Programa de Comidas para Niños y Adultos):
www.SquareMeals.org/CACFPResources
National School Lunch Program (Programa Nacional de Almuerzos Escolares):
www.SquareMeals.org/NSLPResources
Seamless Summer Option (Opción de Verano Constante):
www.SquareMeals.org/SummerResources
Summer Food Service Program (Programa de Servicio de Alimentos de Verano):
www.SquareMeals.org/SummerResources

Para obtener más información, comuníquese con su Centro de Servicios Educativos (ESC):
www.SquareMeals.org/ESC

Food and Nutrition Division
Nutrition Assistance Programs

DEPARTEMENTO DE AGRICULTURA DE TEXAS
COMISIONADO SID MILLER

Este producto fue financiado por USDA.
Esta institución es un proveedor que ofrece igualdad de oportunidades.

Actualizado 10/29/2020
www.SquareMeals.org

2022-2023 School Year Administrative Review CE Checklist		
CE Name		**CE ID**
CE Access to TXUNPS	**On-site Day of Review Dates**	**Month of Review (MOR) (Review Period)**
	to	

Administrative Review Site Selection		
☐	**School Breakfast Program (SBP)**	
☐	**National School Lunch Program (NSLP)**	
☐	**After School Care Program (ASCP)**	
☐	**Fresh Fruit and Vegetable Program (FFVP)**	

	Off-site TX-UNPS Review Form Questions:	**Reference Page(s)**	**Due Date**
100	**Certification and Benefit Issuance (N/A for CEP, RCCI, P2)**	**10**	
200	**Verification (200c only for CEP)**	**10**	
300	**Counting and Claiming**	**10**	
800	**Civil Rights**	**10**	
900	**On-site Monitoring**	**11**	
1000	**Local School Wellness Policy**	**11**	
1100	**Smart Snacks**	**11**	
1200	**Professional Standards**	**11**	
1600	**School Breakfast and SFSP Outreach**	**11**	
2100	**Special Provision Options**	**11**	

Upload the following into **Procurement Review** Attachments		
Procurement Review	**Reference Page(s)**	**Due Date**
Previous Fiscal Year: Upload Initial PR Documentation, Complete Procurement Table	**34, 38**	
PR Selected Samples: Micro, Small, and/or Formal Purchase Method Vendor Invoices	**34**	
FSMC Base Year and Renewal Documentation, if applicable	**35**	
Processing Contracts Documentation, if applicable	**35**	

Upload the following into Administrative Review Attachments		
Section 700: Resource Management	**Reference Page(s)**	**Due Date**
Previous Fiscal Year: Resource Management Summary Form and Required Supporting Documentation	**27**	
Section 100: Certification and Benefit Issuance:	**Reference Page(s)**	**Due Date**
Residential Child Care Institution (RCCI) Master List, if applicable	**11**	
Student Master Roster for Free and Reduced (1st operating day from MOR)	**11**	
Student Master Roster for Denied/Paid (1st operating day from MOR)	**11**	
Free/Reduced Supporting Documentation from Selected Sample (RCCI Day Students, if applicable)	**11**	
Denied Supporting Documentation from Selected Sample (RCCI Day Students, if applicable)	**11**	
Section 200: Verification	**Reference Page(s)**	**Due Date**
Previous SY ☐ Current SY ☐ List of Verified Student Names	**11**	
Verification Sample Supporting Documentation	**11**	
Section 300: Meal Counting and Claiming *See Selected Sites and Programs on Page 1 of CE Checklist*	**Reference Page(s)**	**Due Date**
Roster, Detailed Transaction Report, Edit Check Selected Date:	**12**	
Month of Review Accuclaim(s) for all sites and district-wide	**12**	
Section 1700: After School Care Program *See Selected Sites and Programs on Page 1 of CE Checklist*	**Reference Page(s)**	**Due Date**
Manual Roster/Tally Sheets, Detailed Transaction Report, Edit Check Selected Dates:	**12**	
Month of Review Accuclaim(s) for all sites and district-wide	**12**	
Section 400: Meal Components and Quantities *See Selected Sites and Programs on Page 1 of CE Checklist*	**Reference Page(s)**	**Due Date**
Selected Week of Food Production Records (FPR): Completed FPR for each site and program selected for review (NSLP, SBP, ASCP)	**12**	
Dietary Specs Form for Targeted Menu Site:	**23**	
Day(s) of Review: : Planned FPR for each site and program selected for review (NSLP, SBP)	**12**	
On-site Review Documentation		
Section 300: Meal Counting and Claiming:		
• CE Claim(s) Filed prior to Day of Review		
Section 400: Meal Components and Quantities:		
• All Child Nutrition Labels, Product Formulation Statements Nutrition Fact labels, Manufacturer's Specification Statements, recipes, and any other documentation to support the FPR for the meals served during the Month of Review and Day of Review		

Section 800: Civil Rights:
• CN Staff Civil Rights Training – Sign in Sheets and/or Certificates • Complaint Procedures and Complaint Form • Copy of Media Release, including required documentation for publication • Documentation showing the Media Release was sent to appropriate media outlets for publication
Section 900: On-site Monitoring **Previous SY 21-22** ☐ **Current SY 22-23** ☐
• Breakfast and Lunch Completed On-site Monitoring Forms • ASCP On-site Monitoring Forms, if applicable
Section 1000: Local School Wellness Policy (LSWP)
• Board Approved LSWP • LSWP Triennial Assessment or approved waiver
Section 1100: Smart Snacks
• A list of a la carte food and beverages sold on school campus during the school day • Smart Snack approval documentation and/or calculations
Section 1200: Professional Standards
• List of all personnel who have child nutrition program duties. Include the name, job position, date of hire, and working status (full time, part time, temp., etc.) • Training logs and supporting documentation for selected sample of employees
Section 1400: Food Safety
• Two most recent health inspections for the selected sites • CE-wide and site level HACCP Plan(s), food safety procedures and temperature logs
Section 1900: Fresh Fruit and Vegetable Program (FFVP), if applicable
• All invoices pertaining to the FFVP for the Month of Review • FFVP Month of Review claim must be submitted prior to Day of Review
Additional: Equipment Grant, if applicable
• Invoices and purchase orders supporting the equipment purchased using the Equipment Grant • All sites within a CE that were awarded equipment grant funds will be reviewed on-site
Supply Chain Assistance (SCA) Grant, if applicable
• General Ledger indicating SCA Grant funds deposited to the nonprofit school food service account. • Invoices and purchase orders to support minimally processed food purchases made with SCA Grant funds.

Administrative Review Specialist (ARS):	
Email:	**Contact Number:**
Comments to CE:	

Administrative, Financial and Procurement Review Areas

The Administrative Review (AR) assesses the operation of the National School Lunch Program (NSLP), School Breakfast Program (SBP), and/or Seamless Summer Option (SSO) to ensure compliance with program regulations (7 CFR 210, 220, and 245). The AR is divided into two parts: Critical Areas of Review and General Areas of Review. The Critical Areas of the AR is divided into two parts: Performance Standard One and Performance Standard Two. In addition, the AR also contains the Resource Management (RM) review, also called the Financial Review and Procurement Review.

Critical Areas of Review

Performance Standard One (PS-1)

Areas that are reviewed to determine that each child was provided the proper meal benefits and that meals are properly counted and claimed for reimbursement.

Certification and Benefit Issuance and Verification:

- Applications
- Rosters
- Categorical Eligibility (Direct Certification, Homeless, Migrant, Foster,
- Head Start, Early Head Start, Runaway)
- Verification documentation

Meal Counting and Claiming:

- The review focus on the Point-of-Service System, Daily Record/Accuclaim Edit Check, and Reimbursement Claims.
- Meals claimed for reimbursement are served only to children eligible for free, reduced price, and paid lunches, breakfasts, and afterschool snacks.
- Meals are counted, recorded, consolidated, and reported through a system which consistently yields correct claims.

Performance Standard Two (PS-2)

Areas that are reviewed to determine that meals served to students are prepared, offered, and served according to the daily and weekly meal pattern requirements for the appropriate age/grade groups.

Meal Components and Quantities:

- Lunches claimed or reimbursement by the contracting entity (CE) contain food items/components as required by program regulations
- Completed and accurate Food Production Records, Child Nutrition (CN) Labels/Product Analysis
- Age/grade groups, meeting minimum portions
- Offer versus Serve

Dietary Specifications:

Meeting minimum requirements for:

- Calories
- Saturated fat
- Trans fat
- Sodium

A Nutrition Analysis may be conducted, if necessary.

General Areas of Review

- Implementation of Free and Reduced-Price Policy Statement
- Public Announcement/Media Release
- Overt Identification
- Onsite Monitoring Responsibilities
- Proper Postings and Non-Discrimination Statements of Program Materials
- Complaint Policy
- Reporting and Record Keeping
- Local School Wellness Policy
- Food Safety/Health Inspections
- Civil Rights
- Equipment Grants
- Competitive Food (Smart Snacks)
- Professional Standards
- Water
- School Breakfast Program (SBP) and Summer Food Service Program (SFSP) Outreach
- Supply Chain Assistance Grant (SCA)

Other Federal Programs (Critical and General Areas)

- Fresh Fruit and Vegetable Program (FFVP)
- After School Snack Program (ASSP)
- Seamless Summer Option (SSO)
- Special Milk Program (SMP)
- Child and Adult Care Program (CACFP)

Note: Not all areas will apply to all Contracting Entities

Resource Management (Financial Review)

The Resource Management review is also called the Financial Review. The *Resource Management Summary (RMS)* assesses potential risks for the Resource Management portion of the Administrative Review. The *RMS* must be completed and submitted at least 4 weeks prior to the On-site Review. If risk is identified or if the *RMS* is not submitted by the due date, a Comprehensive Resource Management Review will be conducted. The Comprehensive Resource Management review may include one or more of the following areas:

- Maintenance of the Nonprofit School Food Service Account
- Paid Lunch Equity (PLE)
- Revenue from Nonprogram Foods
- Indirect Costs (IDC)

Procurement Review

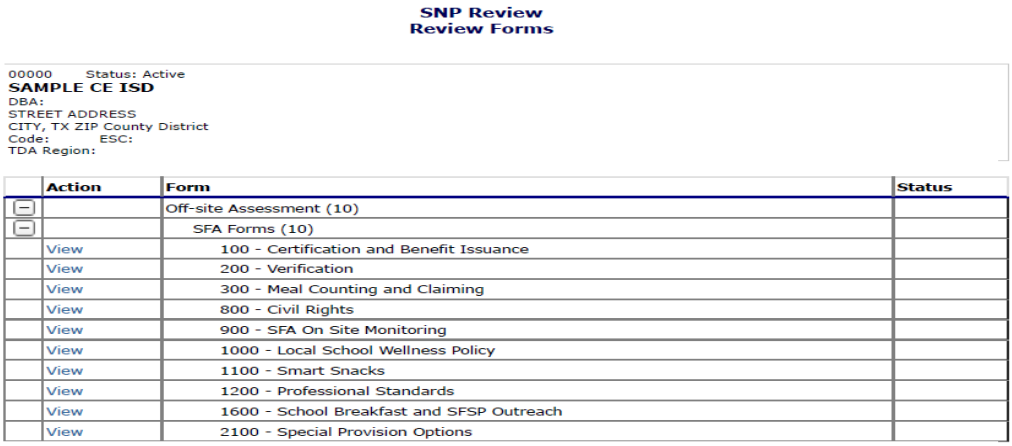
The Procurement Review (PR) will determine how a CE complies with the United States Department of Agriculture's (USDA) Food and Nutrition Services program procurement standards as outlined in 2 CFR 200 (OMB Uniform Guidance) as well as state and local procurement regulations.

The PR assesses the CE's procurement procedures, solicitations, contracts and supporting documentation to ensure compliance with USDA procurement regulations and guidance. The Procurement Review may focus on the following areas, if applicable:

- General Procurement Procedures and Code of Conduct
- Micro-Purchases
- Small Purchases
- Formal Contracts
- Non-competitive and sole source procurement
- Food Service Management Companies (FSMC)
- USDA Foods Reconciliation
- USDA Foods Processing Contracts

Off-site TX-UNPS Review Form Question Instructions

Answer all questions in the AR review form set of TX-UNPS. If a question is not applicable, briefly explain why question does not apply. Do not attach documentation to the paperclip function at each question.



SNP Review
Review Forms

00000 Status: Active
SAMPLE CE ISD
DBA:
STREET ADDRESS
CITY, TX ZIP County District
Code: ESC:
TDA Region:

	Action	Form	Status
⊟		Off-site Assessment (10)	
⊟		SFA Forms (10)	
	View	100 - Certification and Benefit Issuance	
	View	200 - Verification	
	View	300 - Meal Counting and Claiming	
	View	800 - Civil Rights	
	View	900 - SFA On Site Monitoring	
	View	1000 - Local School Wellness Policy	
	View	1100 - Smart Snacks	
	View	1200 - Professional Standards	
	View	1600 - School Breakfast and SFSP Outreach	
	View	2100 - Special Provision Options	

100 Certification and Benefit Issuance

- Question 100 – if applicable, check one of the following boxes if CE is utilizing one of the criteria listed below. If one of the boxes is checked, CE can skip questions 101-121 and answer question 200c in section 200:
    - SFA-wide Special Provision Non-Base Year (Provision 2/3)
    - RCCI, without day students
    - SFA-wide Community Eligibility Provision

200 Verification

- All CEs answer question 200c.
- If CE collected applications during SY 2021-2022, answer questions 200-204.

300 Counting and Claiming

- Answer questions 300-311.
- For question 300, if CE utilizes an electronic system and a paper system, indicate "combination system" in drop-down selection.
- For questions 305a – 305m; describe process, responses cannot be N/A, briefly explain why question does not apply.

800 Civil Rights

- Answer questions 800-807.
- Provide the current non-discrimination statement used for appropriate Program materials at question 800 in the comment box.

900 On-site Monitoring

- Answer question 900.

1000 Local School Wellness Policy

- Answer questions 1000 - 1006.
- CE can provide a link to the LWP and Triennial Assessment in the comment box.

1100 Smart Snacks

- Answer questions 1100 - 1103.
- CE-wide sales of non-reimbursable food/beverage items along with non-food items (if applicable).

1200 Professional Standards

- Answer questions 1200 - 1209.
- Provide completed and planned trainings for school nutrition staff.

1600 School Breakfast & SFSP Outreach

- Answer questions 1600 - 1601.
- Responses cannot be N/A, explain why question(s) do not apply.

2100 Special Provision Options (if applicable)

- Answer questions 2100 – 2111 (not all questions are applicable).

Off-site TX-UNPS AR Critical Area Review Attachments Uploads

Using the instructions outlined in the TX-UNPS AR User Guide, upload the documents listed in the CE Checklist into the Review Attachments section of TX-UNPS.

100 Certification and Benefit Issuance

- Upload the master roster for the entire district (not just for the sites selected) from the first operating day of the month of review (MOR), free and reduced students only using the template Excel worksheet format embedded in this document below (attachment can also be located in the left toolbar).
- Upload the list of denied/paid students for the entire district (not just for the sites selected) from the first operating day of the MOR using the Excel worksheet.

***CE Attachment*: Click the the paperclip to access the Application Format in Excel workbook.** Click Here

- For RCCIs, upload a CE-Master List documenting eligibility for students residing in the RCCI showing child's name, date of birth, personal income and frequency, child's entrance and exit date and approving official's signature.

200 Verification

- List of verified applications
- ARS selected sample of household applications
- Verification Individual Household Report form(s)
- Actual verification letter(s) sent to the household(s) in the verification sample
- Template letters:
  - Verification Notification-Selection Letter for Households
  - Verification Notification-Continuation of Benefits Letter
  - Verification Notification-Verification Results/Adverse Action Letter
  - Verification Information Request: Statement of Earnings/Social Security Income

300 Counting and Claiming

- Detailed transaction meal count report(s) and corresponding Edit Check(s) for reimbursable meals that include the following for each program (NSLP, SBP), for the date(s) and site(s) selected for review:
  - Date of Meal Service
  - Type of Meal Service
  - Student Name
  - Student Eligibility
- Reports that support the MOR TX-UNPS Claim(s) for CE-wide (total) and all CE sites.

400 Meal Components and Quantities

- Completed Dietary Specifications Summary Form for the Targeted Menu School Site for both breakfast and lunch for the dates selected for the completed MOR FPR.
- Menus and completed FPR for the dates selected for breakfast and lunch for each site(s) selected for review.
- Menus and planned DOR FPR for breakfast and lunch for date(s) and site(s) selected for review.

1700 After School Snack Program

- Detailed transaction meal count report(s) and corresponding Edit Check(s) for reimbursable meals that include the following for the date(s) and site(s) selected for review:
  - Date of Meal Service
  - Student Name
- Reports that support the MOR TX-UNPS Claim(s) for ASCP
- Menus and completed FPR for the dates selected for each site(s) selected for review.

Off-site TX-UNPS At-Risk Attachments Uploads

Using the instructions outlined in the TX-UNPS AR User Guide, upload the documents listed in the CE Checklist into the At-Risk Review Attachments section of TX-UNPS.

300 Counting and Claiming

- Rosters, detailed transaction meal count report(s) and corresponding Edit Check(s) for CACFP reimbursable meals for the most recent 5 operating days prior to the day of review.
- Reports that support the MOR TX-UNPS CACFP Claim(s) for CE-wide (total) and all CE sites.

400 Meal Components and Quantities

- Menus and completed FPR for the dates selected (the most recent 5 operating days prior to the day of review.)
- Menus and planned DOR FPR for CACFP At-Risk for date(s) and site(s) selected for review.

On-site Documentation for CACFP At-Risk

- CE Claim(s) Filed prior to Day of Review
- Roster, Detailed Transaction Report, Edit Check for all sites observed
- Completed FPR and supporting documentation for all sites selected for review
- Completed on-site monitoring forms
- Training logs and supporting documentation for staff operating CACFP

TX-UNPS Administrative Review User Guide

Getting Started

Before you can begin using TX-UNPS, you must be assigned a user ID and password that provides the required security rights.
You must fill out User Access Manager (UAM) form FND - 135. Only one UAM will be established at a time within each CE.
The designated User Access Manager (UAM) is a person at your entity who is responsible for security management of users within your entity. The UAM has the ability to add, modify, and deactivate users, ensures users have the correct security permissions and help users with their password resets directly in Texas Unified Nutrition Program System (TX-UNPS).

https://txunps1.texasagriculture.gov/TXUNPS/Splash.aspx

Tip: Save the link to your favorites list or create a shortcut to your desktop for quicker access.



TIP: You can add this URL to your browser's Favorites list or create a shortcut to the web site on your desktop for quicker access to the site. Refer to your browser or operating system help files for further information.

Logging On

To log on

Access TX-UNPS by typing the URL into the address line of your web browser.

Enter your assigned **User ID**.

Enter your **Password**.

Select **Log On**.

Note: If you do not have a User ID and Password, contact the Texas Department of Agriculture at (877) TEX-MEAL.



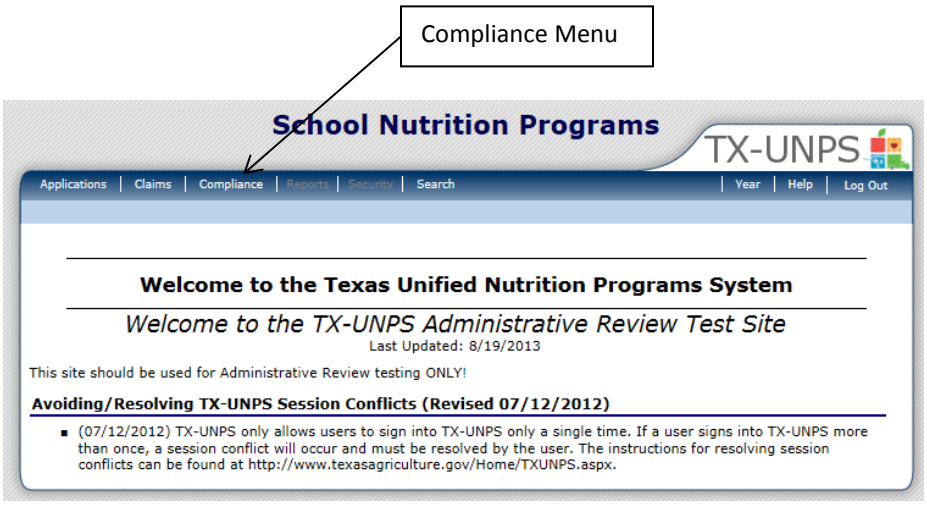
TIP: The Password is case-sensitive, so be sure to use upper- and lower-case letters, if necessary.

Off-site Review Forms

Before you can access the Off-site review forms, your Contracting Entity must have an approved 2022-2023 Annual Application on file in TX-UNPS.

To access the Review Forms

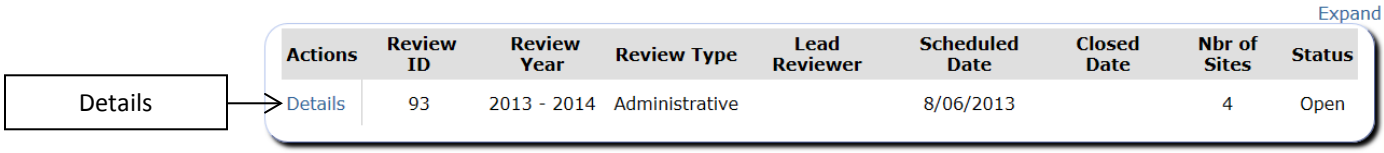
1. Select the **Compliance** Menu.



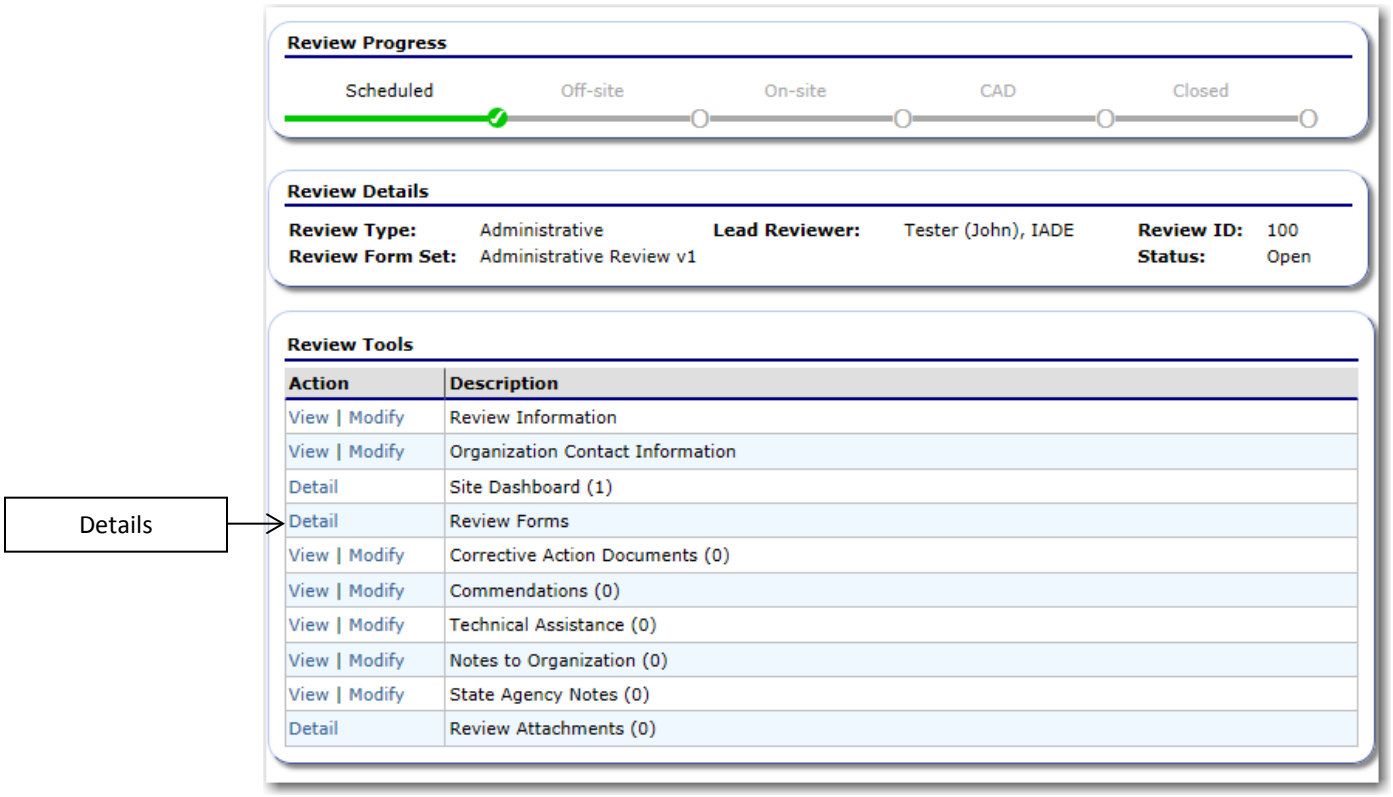
2. Select **Review Tracking** from the Compliance menu**.**



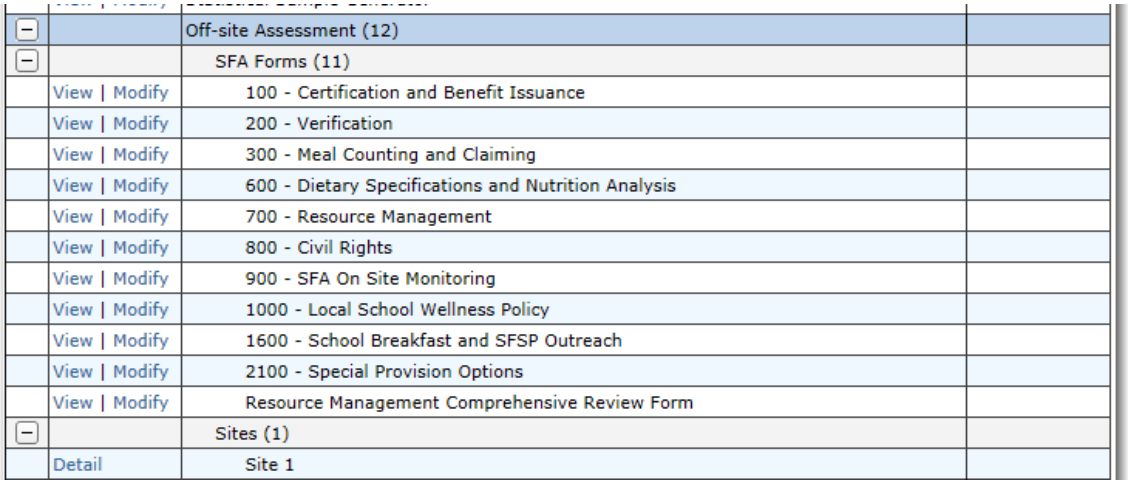
Select the **Details** link for the desired review. The Review Dashboard displays.



Select **Detail** next to the Review Forms option for the current school year.



The Off-site Review Forms screen displays.



Note: The system groups the forms by type. You can expand or collapse the forms by form group by selecting the ⊞ or ⊟ icons for easier viewing.

Figure 1: Review Forms screen (partial)

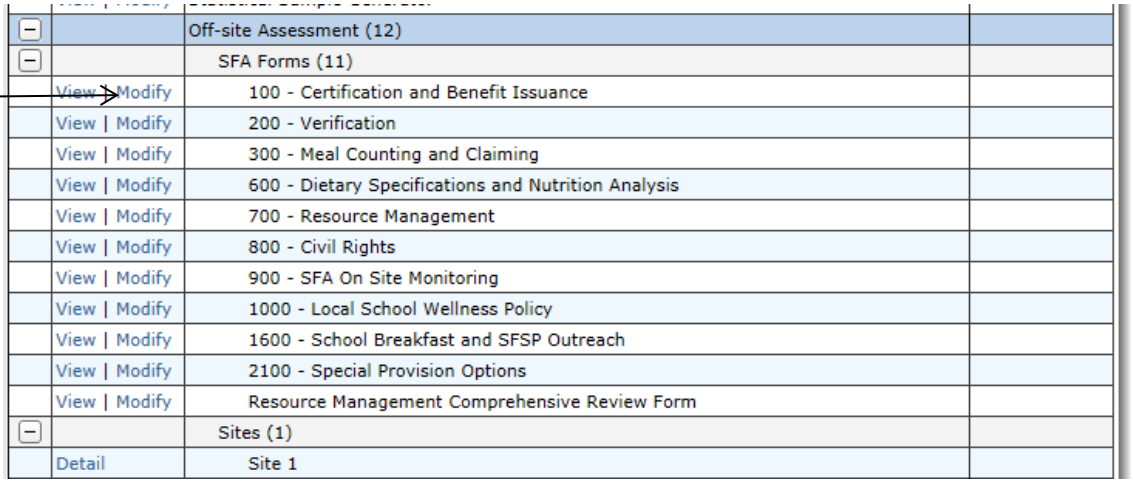
SFA Forms

The Off-site SFA Forms are groups of forms provided by the USDA to be completed prior to the On-site form groups.

To complete the SFA Off-site Assessment forms

1. Select **Modify** for the desired Off-site Assessment form.

Modify



−		Off-site Assessment (12)
−		SFA Forms (11)
	View | Modify	100 - Certification and Benefit Issuance
	View | Modify	200 - Verification
	View | Modify	300 - Meal Counting and Claiming
	View | Modify	600 - Dietary Specifications and Nutrition Analysis
	View | Modify	700 - Resource Management
	View | Modify	800 - Civil Rights
	View | Modify	900 - SFA On Site Monitoring
	View | Modify	1000 - Local School Wellness Policy
	View | Modify	1600 - School Breakfast and SFSP Outreach
	View | Modify	2100 - Special Provision Options
	View | Modify	Resource Management Comprehensive Review Form
−		Sites (1)
	Detail	Site 1

2. Complete all review questions.

   - If additional information from the USDA Guidiance is available, select to view the tool tip.
   - You will see icon to the right of most questions in the Off-site Assessments to upload attachments. **PLEASE DO NOT UPLOAD ATTACHMENTS HERE.**

- **Note:** Documents requested by TDA for the Offsite review will be uploaded in the Review Attachments section of the Review Dashboard. Please reference page 7 of this document to locate the Review Attachments section.

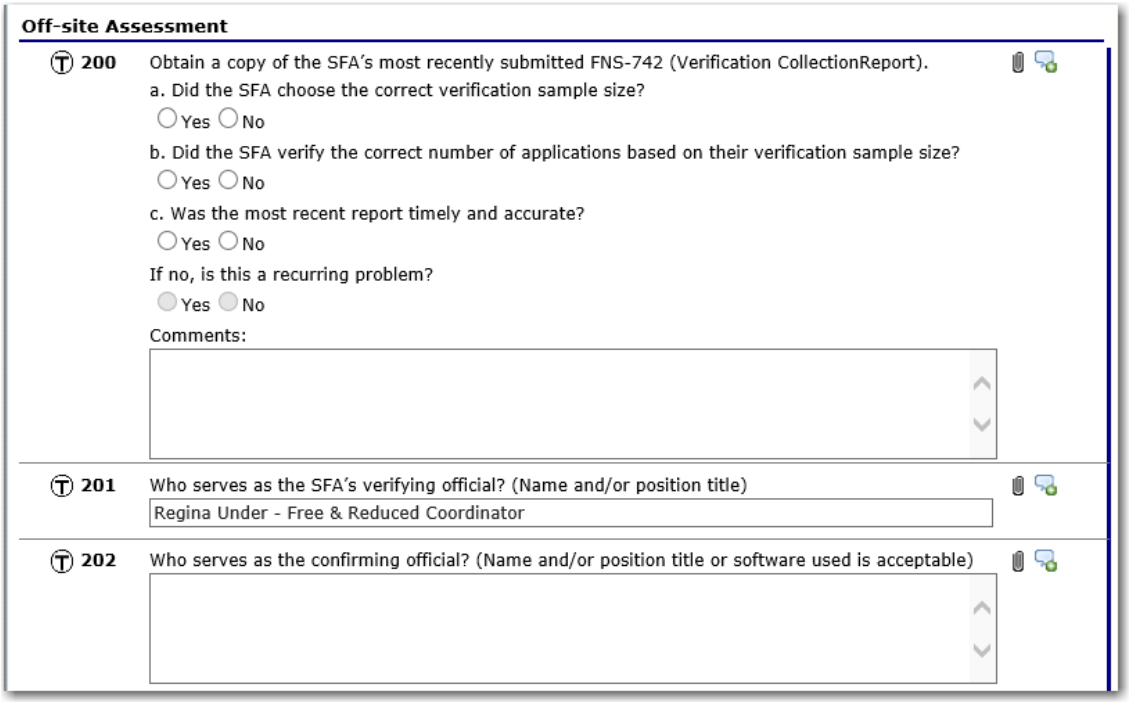
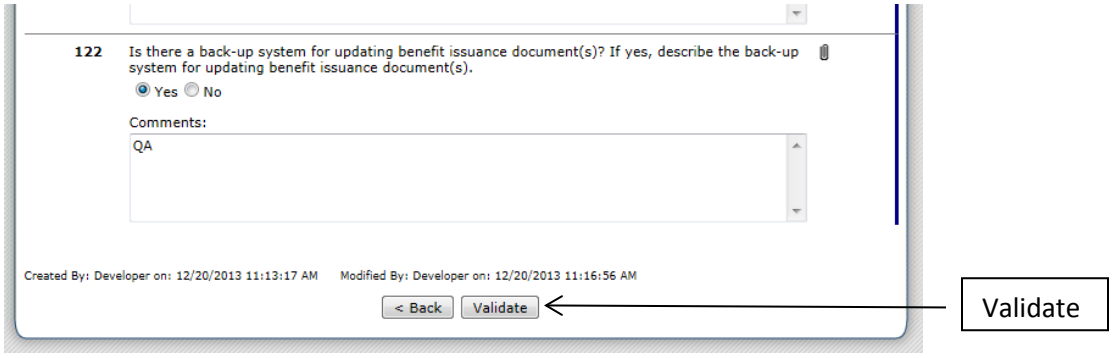


Figure 2: Off-site Assessment Form – 200 – Verification (partial)

- Select **Validate** to save the form and check for errors**.**



- If the form contains errors (e.g., a required question was not answered), an error message displays and the form was saved with an Error status.

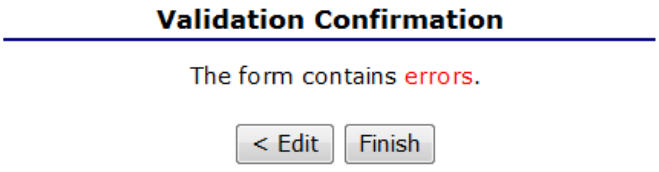


Figure 3: Validation Confirmation – Errors screen

- Select **<Edit** to return to the form. Questions with errors display with a red indicator ( ) beside the question number.

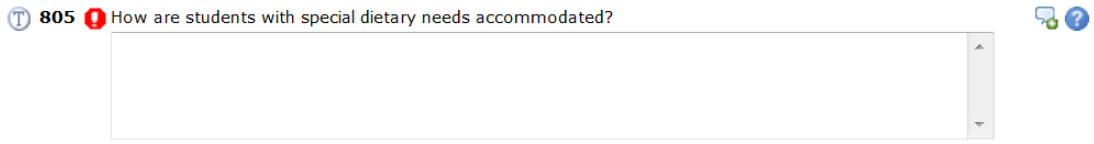


Figure 4: 800 – Civil Rights – Question with Errors screen (partial)

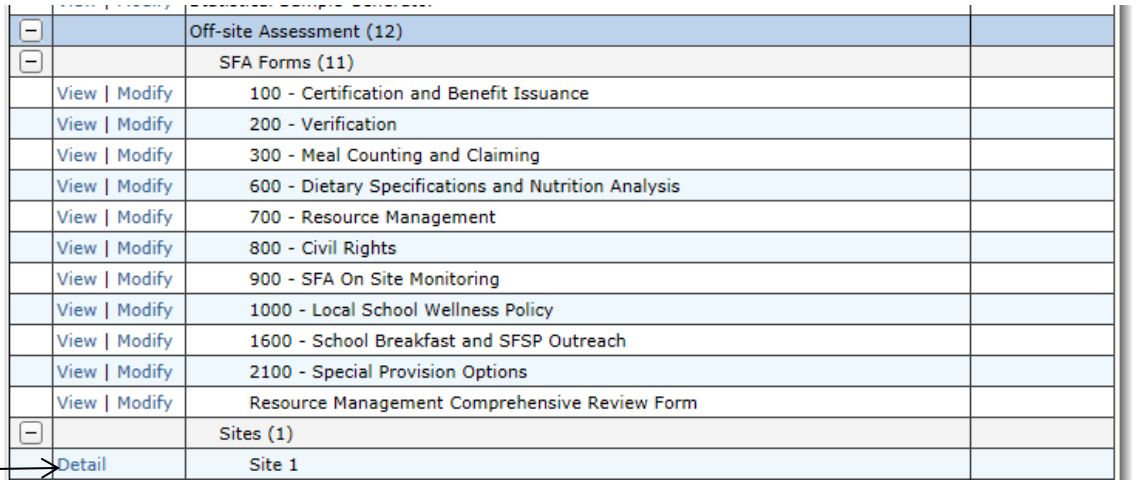
- Correct any errors and select Validate. Once the form has been saved without errors, the status changes to "Pending Review."

Sites

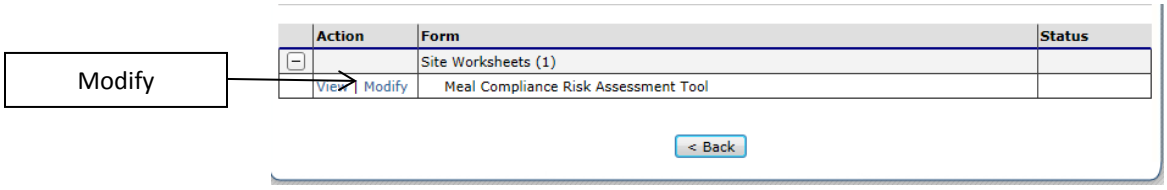
The Sites section of the Off-site Assessment consists of the Meal Compliance Risk Assessment Tool. CEs will only complete the Meal Compliance Risk Assessment Tool, by site, if more than one site is being reviewed. If only one site is selected for review, this screen will not display the Meal Compliance Risk Assessment Tool.

To use the Meal Compliance Risk Assessment Tool by site

1. Select **Modify** for the desired Site.



2. Select **Modify** for the Meal Compliance Risk Assessment Tool.



3. Complete questions. For each question answered, risk points display in yellow.
4. Select **Validate**. The total Risk Score displays at the top and bottom of the screen.

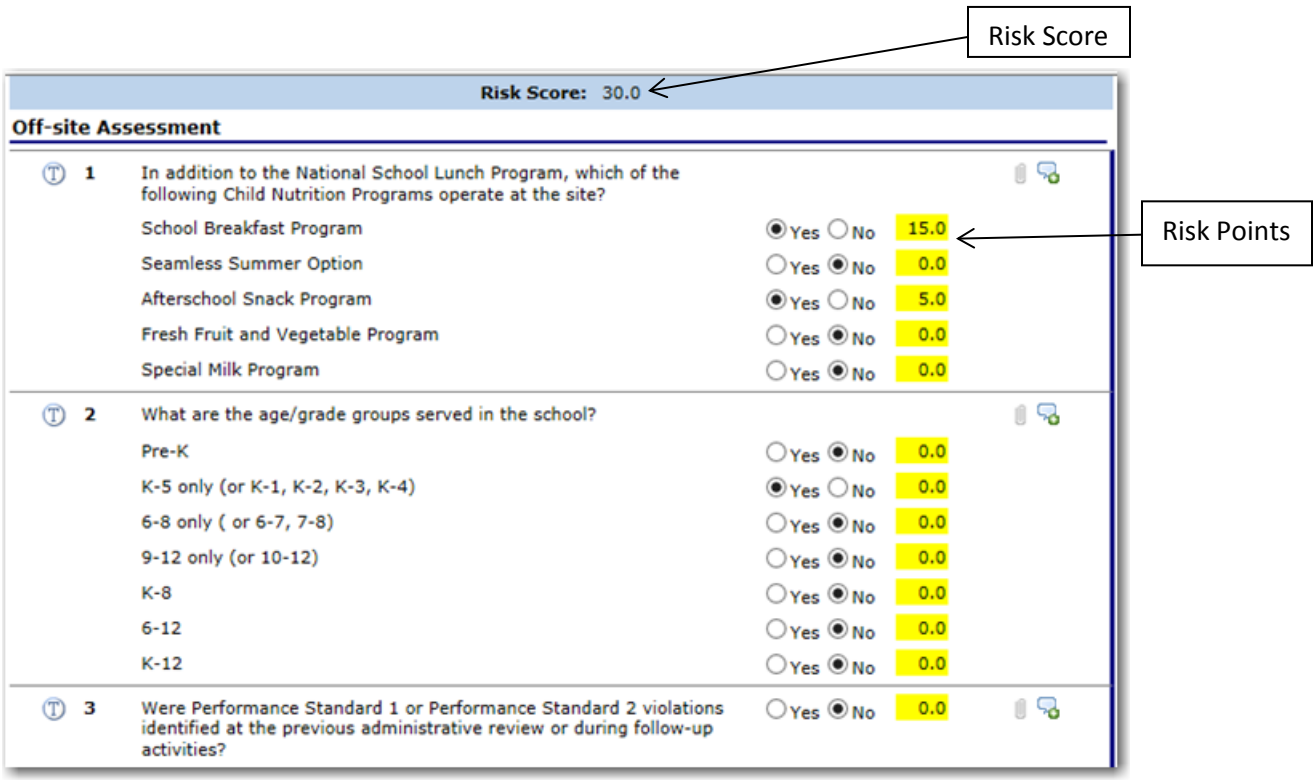


Figure 5: Meal Compliance Risk Assessment Tool screen (partial)

Per the USDA Guidance Manual, the Meal Compliance Risk Assessment Tool must be completed for each selected school. The Meal Compliance Risk Assessment evaluates error-prone areas and provides risk scores. The selected site with the highest Meal Compliance Risk Assessment score must undergo a more in-depth meal review (i.e., "Targeted Menu Review").

Form Statuses:

A status column is located to the right of each SFA level form and Site level Form. They may display the following statuses:

Incomplete – the form has been started, but has not been completed.

Completed – all questions have been answered in the form without errors.

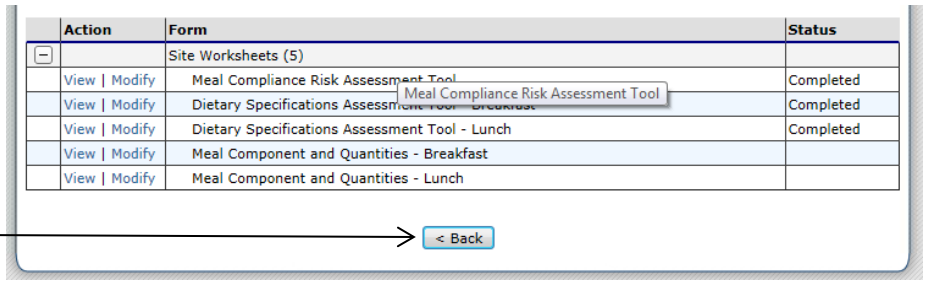
Error – required questions in the form have not been answered correctly.

Not Applicable – the form set does not apply to the CE and does not need to be completed.

Accessing Review Attachments:

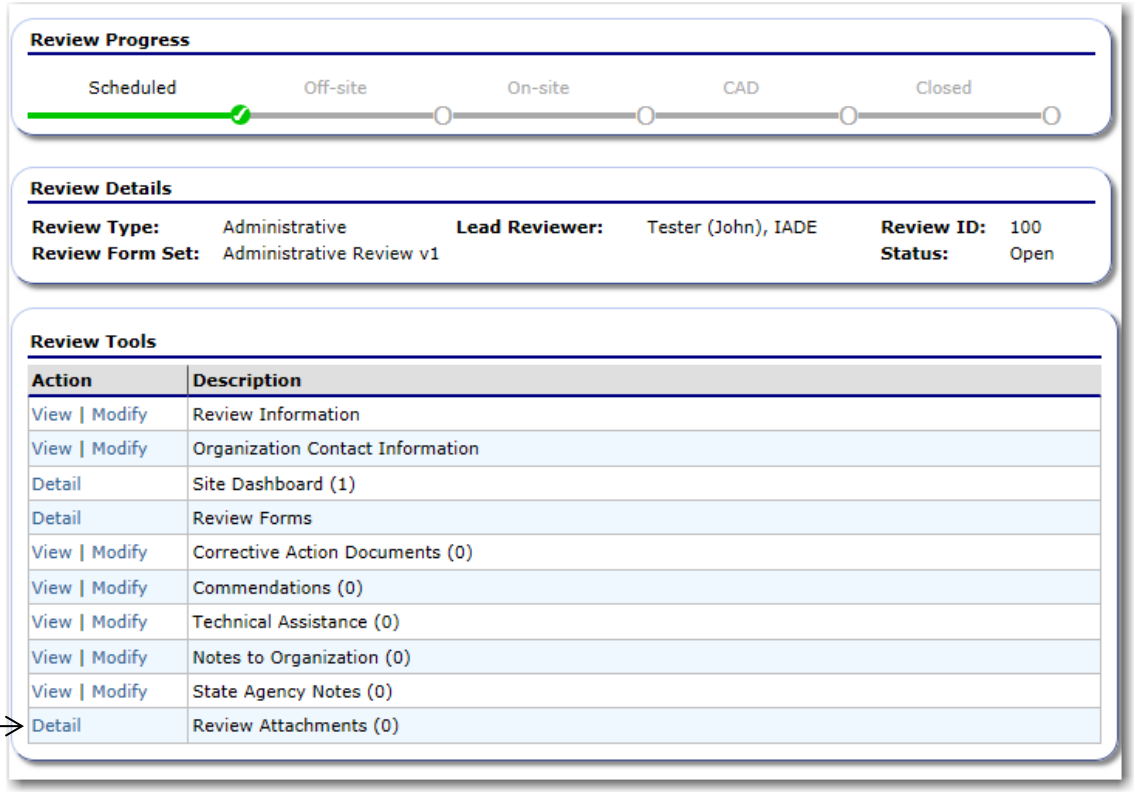
TDA reviewers will request CEs to provide specific documentation during the Off-site Assessment and CE's will attach the requested documents in this section of TX-UNPS.

1. CE must return to the SNP Reviews Review Dashboard. If you were currently working in the Off-site Assessment forms, click the "Back" button at the bottom of the screens until you reach this page.



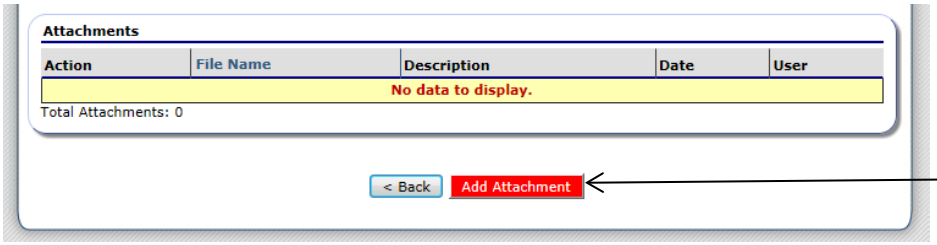
Back

2. Click “Details” next to Review Attachments.



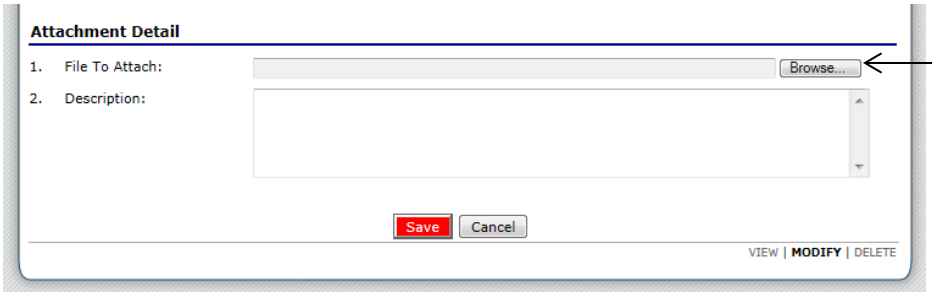
Details

3. Click “Add Attachment.”

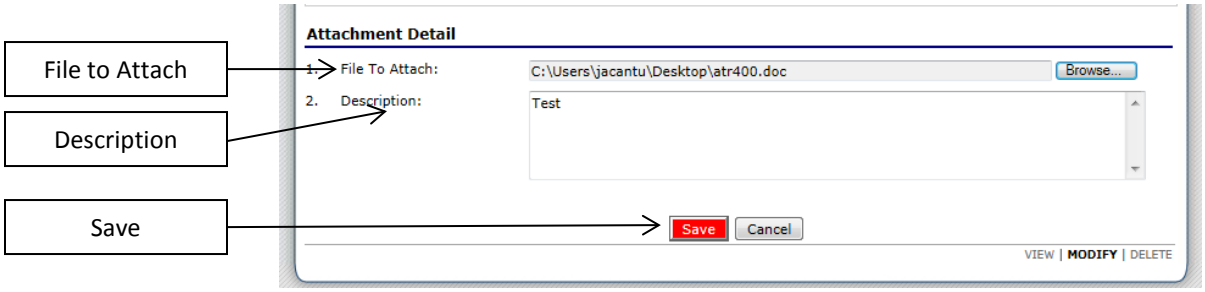


Add Attachment

4. Click “Browse” to open a search window for your computer.



5. Once the browser window appears, search for the document on your computer you want to attach. Once you find your document, double click it to attach and upload into TX-UNPS. You will see the file name appear in the File To Attach cell. Please add a brief description of the file attached in the Description cell. Once you have completed attaching your document, click “Save.”



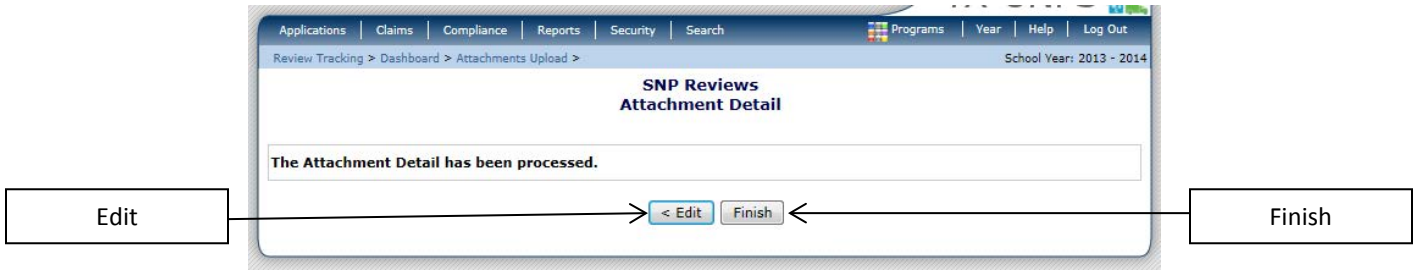
- **Note:** Please use the following naming convention for files attached:

Offsite Form Series_Document Name (example 100_Student Roster), or

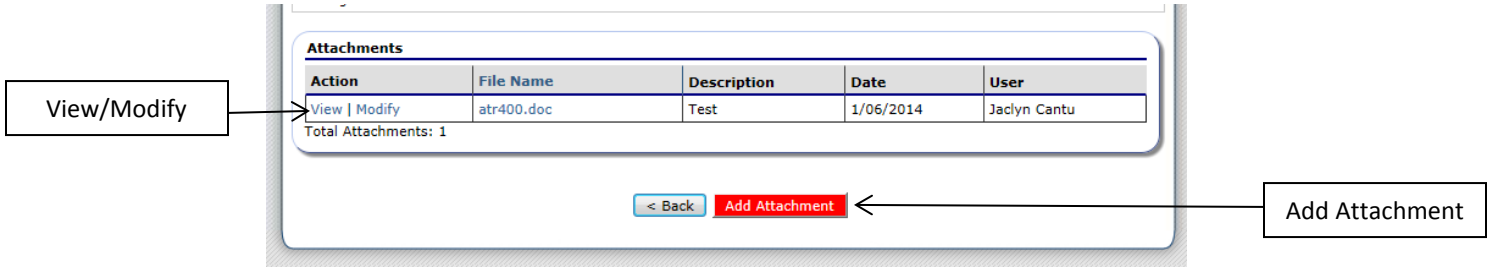
Offsite Form Series_Document Name_Site (example 300_Meal Counts_ABC

Please reference the CE Checklist for Form Series and Document Names.

6. If you accidentally attach the wrong file, click the “Browse” button again. Search for the desired file and attach it by double clicking on it. The new attachment will over-write the previous document you attached. Once you have completed the attachment and clicked save, click “Finish” to complete the action of attaching a document. Click “Edit” if you must go back to the previous attachment to make a change.



7. Once you have finished attaching a document, you will return to your Attachment List screen. You will see the document you have attached with the ability to View or Modify the attachment. You may also attach another document by clicking the "Add Attachment" button again.



Once all applicable forms in the Off-site Administrative Review have a "Completed" status and all requested documents have been attached, you have finished the Off-site portion of the review. The ARS will contact you for any questions, corrections, or errors that may be addressed prior to the On-site review.

Dietary Specifications Summary

Instructions: For each question below, select the number that corresponds to the best description for Breakfast and Lunch menus served the week of _____ at _____

1 - Always (every day or 5 days/week)

2 - Most items or most of the time (3-4 days/week)

3 - Some items or some of the time (1-2 days/week)

4 - Never (0 days/week)

1) Are specifications considered when purchasing menu items and condiments to limit the following?

a. Saturated-Fat

Breakfast Select One Lunch Select One

b. Sodium

Breakfast Select One Lunch Select One

c. Trans-Fat

Breakfast Select One Lunch Select One

2) Only low-fat (1 percent milk fat or less, unflavored) or fat-free (unflavored or flavored) milk is used for student consumption and in menu recipes.

Breakfast Select One Lunch Select One

3) Low-fat, fat-free milk products used. This includes yogurt and cottage cheese.

Breakfast Select One Lunch Select One

4) Cheeses (all varieties including reduced fat) is controlled by placing items in portion cups, portion controlled packaging or the use of appropriate serving size utensils to limit portion size allowed per meal. This includes cheese offered on salad bars.

Breakfast Select One Lunch Select One

5) Are non-creditable cheese products offered as part of a reimbursable meal? (Non-creditable cheese includes: cheese sauce without a CN label or product formulation statement, cheese product, imitation cheese and powdered cheese).

Breakfast Select One Lunch Select One

6) Reduced-fat, low fat, fat-free mayonnaise, sour cream, and/or salad dressings offered instead of full-fat varieties.

Breakfast: Select One | Lunch: Select One

7) Broths and/or soups with low or reduced sodium are used, rather than regular broths and soups.

Breakfast: N/A | Lunch: Select One

8) Fresh, frozen, and/or low sodium or no sodium canned vegetables offered, rather than reduced sodium or regular canned vegetables.

Breakfast: Select One | Lunch: Select One

9) How often are bacon, bacon bits, pepperoni, chow mein noodlees, pickles, olives, packaged crackers and/or croutons available to students?

Breakfast: N/A | Lunch: Select One

10) How often are meats such as hot dogs, luncheon meats (e.g. ham, turkey) and/or sausage offered on the service line and/or salad bar? (All varieties - including reduced and/or low sodium).

Breakfast: Select One | Lunch: Select One

11) Canned fruits are packed in water, fruit juice, or light syrup. If only fresh fruit is offered, then select the "N/A" dropdown response.

Breakfast: Select One | Lunch: Select One

12) Grain-based desserts such as doughnuts, pastries, cakes, and cookies are limited to 2 oz. eq. per week or less for Lunch? If grain-based desserts are not offered, then select the "N/A" dropdown response.

Breakfast: N/A | Lunch: Select One

13) How often are "grain-based dessert" type items such as doughnuts, toaster pastries, cake, muffins, and cookies offered at Breakfast?

Breakfast: Select One | Lunch: N/A

14) Other seasonings, such as herbs and spices, substituted for salt.

Breakfast: Select One | Lunch: Select One

15) Oil used in recipes, rather than shortening, margarine, or butter.

Breakfast Select One Lunch Select One

16) Fat is drained from browned meats and poultry and/or fat is skimmed from broths, soups, stews, or gravies and/or skin is removed from poultry or skinless poultry is used. If browned meats and poultry are not offered, then select the "N/A" dropdown response.

Breakfast Select One Lunch Select One

17) Is a deep fat fryer used on-site to prepare school meal items?

Breakfast Select One Lunch Select One

18) Is butter or margarine added to breads and/or vegetables prior to serving?

Breakfast Select One Lunch Select One

19) Standardized recipes followed: all ingredients are weighed or measured with standardized weight or measuring utensils.

Breakfast Select One Lunch Select One

20) Meal pattern for appropriate age/grade groups are used for menu planning, including the meal patterns and serving sizes.

Breakfast Select One Lunch Select One

21) How often are extra, non-reimbursable food items (e.g. potato chips, ice cream, pudding and/or gelatin) offered on the menu? Items sold a la carte are exempt.

Breakfast Select One Lunch Select One

22) Portion sizes for condiments (e.g. hot sauce, ketchup, mustard, salad dressing) are controlled by placing items in portion cups, portion controlled packaging or the use of appropriate serving size utensils to limit portion size allowed per meal.

Breakfast Select One Lunch Select One

23) Students are offered butter or margarine:

a. In the serving line?

Breakfast Select One Lunch Select One

b. At a condiment station?

Breakfast Select One Lunch Select One

c. If they ask for it?

Breakfast Select One Lunch Select One

24) Students are offered salt:

a. In the serving line?

Breakfast Select One Lunch Select One

b. At a condiment station?

Breakfast Select One Lunch Select One

c. On meal tables.

Breakfast Select One Lunch Select One

d. If they ask for it.

Breakfast Select One Lunch Select One

25) Larger portions and/or bonus items and/or seconds are offered (offering portion sizes that are inconsistent with the planned menu). Entrees sold a la carte are exempt.

Breakfast Select One Lunch Select One

Once complete please save and upload a copy to TXUNPS Review Attachments.

2022-2023 Resource Management Summary

Complete required information with supporting documentation for prior fiscal year, 2021-2022.

Contracting Entity #: _____ Completed by Name: _____

CE Name: _____ Title : _____

Fund Type: _____ Telephone # : _____

Email: _____

Fund Type:
- ☐ 240 Special Revenue Fund
- ☐ 701 Enterprise Fund
- ☐ 101 General Fund

Fiscal Year:
- ☐ 07/01/XX – 06/30/XX
- ☐ 09/01/XX – 08/31/XX
- ☐ 01/01/XX – 12/31/XX

Indicate Special Provision Status, If Applicable

☐ Community Eligibility Provision (CEP), district-wide ☐ CEP, partial ☐ Provision 2 (P2), district-wide
☐ P2, partial Universal Free Feeding: ☐ Breakfast ☐ Lunch

Documents to Provide with Completed Resource Management Summary Form

- ☐ Chart of Accounts for Child Nutrition (CN) Fund
- ☐ Child Nutrition Program Detailed General Ledger for all CN Funds (**PREVIOUS FISCAL YEAR**)
  Original PDF and Excel format Information to be included: Account Fund Code/Number, Account Description/Name, Transaction Description, Vendor Name, Vendor Number, Purchase Order Number, Invoice Date, Invoice Number, Amount, Check Number, Payment Date with Account Balances
- ☐ Statement of Net Assets or Statement of Net Position (Balance Sheet)
- ☐ Statement of Activity or Revenues/Expenditures
- ☐ Vendor Paid List with Total Expenses per Vendor
- ☐ Completed current and prior year for both PLE and Adult Meal Calculator

Note: Nonprofit school food service account means the restricted account in which all of the revenue from all food service operations conducted by the School Food Authority (SFA) principally for the benefit of school children is retained and used only for the operation or improvement of the nonprofit school food service. This account shall include, as appropriate, non-Federal funds used to support paid lunches and proceeds from non-program foods.

*****Please complete based on the previous fiscal year*****

Maintenance of Nonprofit School Food Service Account

700. Did the SFA have the ability to accurately track all revenues and expenditures for the nonprofit school food service separately from all other transactions? Yes ☐ No ☐

If Yes, describe the method used below.

(i.e. having a separate account only for food service revenues and expenditures, identifying all financial transactions by a separate fund code, using a separate ledger or other system to track revenues and expenditures specific to food service.)

Comments:

Please complete Q. 701 using Assests and Liabilities

701. Did the SFA have a fund balance in excess of 3 months average expenditures? Yes ☐ No ☐

1a. Net cash resources = assets (excluding inventories) minus liabilities

Assets _____ *- Liabilities* _____ = $ 0.00 *net cash resources*

2a. Operating costs (minus depreciation) = net adjusted operating expenses

Operating Costs _____ *- Depreciation (if applicable)* _____ = $ 0.00 *net adjusted operating expenses*

3a. Average monthly expenses = operating expenses divided by number of operating months

(2a total) $ 0.00 */ operating months=* _____ _____ *average monthly expenses*

4a. Average expenses for 3 months = average monthly expenses multiplied by 3

(3a total) _____ *x 3 months* 3 = $ 0.00 *average expenses for 3 months*

5a. Is the net cash resources (1a) equal to or less than average expenses for 3 months (4a.)?

(1a.) _____ *=< Avg expenses for 3 months (4a.)* $ 0.00

Net cash resources 1a. must be less than or equal to 4a to be in compliance with limitation with net cash resources.

If the SFA has an approved plan by the State agency to use the excess net cash resources, attach a copy of the plan and/ or corrective action plan that coincides with the review period.

Comments:

702. Did the SFA transfer funds other than approved indirect costs out of the food service account to support general school district expenses or non-food service-related activities? Yes ☐ No ☐

If Yes, explain below and provide the amount and date of the transfer.

Comments:

$ _____
Amount of transfer

_____
Date of transfer

703. Excluding the purchase of equipment using equipment grant funds, if the SFA used food service funds to buy equipment during the school year under review, did it receive prior approval from the State agency either directly or via the State's pre-approved equipment list?

Yes ☐ No ☐ N/A ☐

If the only equipment purchased was made partially or in full with an equipment grant received from the State agency, answer "N/A" and do not list these equipment purchases.

Note: Equipment costs which equal or exceed $5,000 require agency approval prior to purchasing.

Explain below or provide an attachment for the following:

•Your capitalization threshold for equipment purchases (the minimum cost at which an asset must be reflected in your accounting); and
•Information about equipment purchases made with food service funds during the Resource Management review period that required pre-approval either directly from the State agency or via the State's approved equipment list.

Comments:

704. Did the SFA have any financial findings related to unallowable costs or financial mismanagement in the child nutrition programs on a previous administrative review or as part of an audit (for example, OIG, Single Audit, previously called A-133 audit, other state audits) within the past three years?

Yes ☐ No ☐

If Yes, explain below.

Comments:

705. Did the SFA have internal control procedures in place to ensure that only allowable costs were charged to the nonprofit school food service account?

Yes ☐ No ☐

If Yes, explain in detail all internal control procedures that were in place at the SFA.

Some examples may include:

•Written procedures
•Annual allowable cost training;
•Financial management standard operating procedures;
•The assignment of financial responsibilities to different individuals;
•Policies for ensuring that bad/delinquent debt is not paid for with food service funds

Comments:

Paid Lunch Equity

706. Did the SFA use the Paid Lunch Equity Tool or a comparable mechanism to evaluate its need to raise its paid lunch prices?

Yes ☐ No ☐ No-$0 Balance ☐ N/A-1 ☐ N/A-2 ☐

If "No- SFA had a positive or zero Food Service balance as of 12/31/2021 and was exempt from the PLE requirements" is selected, please indicate the balance in the nonprofit food service account as of 12/31/2021 below. See current guidance for student prices.

- ***N/A-1 should be selected if all sites at the SFA are non-pricing;***
- ***N/A-2 should be selected if the SFA charged at least the target weighted average paid lunch price at all sites.***

Indicate the amount that was charged for paid lunches below.

CE's Average Weighted lunch price for SY 22-23, if applicable. $

Please indicate the Food Service fund balance as of December 31, 2021, if applicable. $

Please indicate the amount of the paid lunch price increase for SY 22-23, if applicable. $

Comments:

707. Did the SFA receive a transfer of non-Federal funds into the food service account to reduce or eliminate the need to raise paid lunch prices?

If Yes, indicate the amount of non-Federal funds added to the food service account to support paid lunch prices below.

Yes ☐ No ☐ N/A-1 ☐ N/A-2 ☐ N/A-3 ☐

Amount of Non-Federal funds added to the food service account. $_____

- ***N/A-1 may only be selected if all sites at the SFA were non-pricing;***
- ***N/A-2 may only be selected if the SFA charged at least the target weighted average paid lunch price at all sites.***
- ***N/A-3 may only be selected if SFA had a positive or zero Food Service balance as of 12/31/2021 and was exempt from the PLE requirements.***

Comments:

708. Did the SFA adjust its paid lunch prices for the Review Period at the level at or above what was required by the USDA Paid Lunch Equity (PLE) tool or comparable mechanism?

Yes ☐ No ☐ N/A-1 ☐ N/A-2 ☐ N/A-3 ☐ N/A-4 ☐

- ***N/A-1 may only be selected if all sites at the SFA were non-pricing or if the SFA charged at least the target weighted average paid lunch price at all sites.***
- ***N/A-2 may only be selected if the SFA charged at least the target weighted average paid lunch price at all sites.***
- ***N/A-3 may only be selected if the SFA received a PLE exception from the State agency for the review period.***
- ***N/A-4 may only be selected if SFA had a positive or zero Food Service balance as of 12/31/2021 and was exempt from the PLE requirements.***

Please note in comment box if the SFA is exempt.

Comments:

Revenue from Non-program Foods

"Non-program foods" are foods and beverages sold in a participating school other than reimbursable meals that are purchased using funds from the nonprofit school food service account.

709. With the exception of milk, did the SFA sell **Smart Snacks***, second entrees, and/or catering? (e.g., foods/beverages for school board meetings; foods for outside entities and programs)

Yes ☐ No ☐

***Smart Snacks** are any food or beverage sold to students at schools during the school day other than those foods provided as part of the reimbursable school meal programs. Examples include a la carte items sold in the cafeteria and foods sold in school stores, snack bars, and vending machines.*

Comments:

710. If the SFA provided adult meals for teachers and/or parents, did the SFA obtain full payment from the adults receiving the meals and/or cover the price of those meals by some other means (general fund transfer, etc.)?

Yes ☐ No ☐ N/A ☐

Please indicate how the price of the adult meals was recovered below.

Comments:

711. If the SFA charged for adult meals, were the meal prices sufficient to cover the overall cost of the meals in compliance with FNS Instruction 782-5, Rev. 1? Yes ☐ No ☐ N/A ☐

Indicate in the comment box below how adult meal prices were calculated (example: meal equivalents plus commodity value, etc.) and the dollar amount(s) charged for adult meals (i.e., Method 1 or Method 2).

Adult Meal Breakfast Price: $

Adult Meal Lunch Price: $

Comments:

Indirect Costs

712. Were indirect costs charged/ allocated to the SFA's nonprofit school food service account? Yes ☐ No ☐ N/A ☐

Comments:

Proportion of Program / Non-program Revenue and Food Cost

Each year, CEs must have a mechanism to separate, account, and assess their revenue from program food (reimbursable meals) and non-program food (non-reimbursable foods) to ensure that non-program food revenue generates at least the same proportion/ratio of revenue as it contributes toward total food costs.

Calculations – Ratio of Program Foods vs Non-program Foods	
Please provide the information below concerning Program and Non-program foods:	
(Step 1) Total non-program food revenue:	$ _____
(Step 2) Total non-program food cost:	$ _____
(Step 3) Total program revenue:	$ _____
(Step 4) Total program food cost:	$ _____
A. Revenue Ratio = Non-program food revenue ÷ (Total Program revenue + Non-program revenue) >= (greater or equal to) B. Food Cost Ratio = Non-program food costs ÷ (Total Program foods + Non-program food costs)	A. _____ B. _____

Calculating Food Costs: In calculating costs for program/non-program proportion, the CE will use only the cost of the actual food. The CE will not include labor or other costs in this calculation.

[Note: If the menu item is made from scratch, the CE would need to determine the price of all ingredients to calculate the food costs.]

Procurement Review Documents

Below is a list of Procurement Review (PR) Documents that will be requested during the PR. Your reviewer will outline the needed items with due dates throughout the course of the PR. Additional documents may be requested as needed**.** Please upload into the Procurement Review Attachments section of TX-UNPS.

Some documents have previously been requested from the child nutrition cooperatives and will not need to be uploaded. However, the CE will still be expected to discuss all PR areas and additional CE-specific items will be requested, such as cost analysis, invoices, and/or other supporting documentation.

Initial PR Documents

- Written Code of Conduct
- Documented Procurement Procedures
- Detailed General Ledger
- Vendor Paid List
- FSMC documentation, if applicable
- Processing contract documentation, if applicable

School Food Authority (SFA) Procurement Table

- Based on the Vendor Paid List/summary of total expenditures by vendor (nonprofit food service account only), complete the PR table.
- CE will complete the PR table based on the procurement method, and not solely on thresholds.

Micro-purchases (*Vendor transactions selected for review*)

- Purchase orders issued
- Receipts/Invoices

Small Purchase Procurements (*Vendor transactions selected for review*)

- Solicitation documents (specifications, evaluation criteria, contract (if applicable))
- Bid Quotes/Responses
- Evaluation of Responses for Award
- Purchase orders
- Receipts/Invoices

Formal Procurements (*Documents for vendor contracts selected*)

- Solicitation documents (specifications, evaluations (with supporting documentation), contracts, rejected bids (if applicable))
- Bidder/Offeror responses
- Evaluation of responses for contract award
- Executed contracts
- Contract renewal/addendum/amendments, if applicable (since original contract was awarded)
- Cost/price analysis documentation
- Non-competitive proposal authorization, if applicable
- Invoices (3 vendor invoices identifying goods/services procured and amount paid)

Note: Documents for formal contracts procured by a Cooperative, Group Purchasing Organization (GPO), or other identified Third Party are already on file with TDA as part of School Operation's annual Cooperative Project. With the exception of CE-level documentation- selected vendor invoices and/or Cost/Price Analyses- your reviewer will not request, and you will not upload, documents detailing the history of formal procurement.

FSMC – Base Year (*For State agencies reviewing the SFA-FSMC base year. Solicitation and evaluation for FSMC(s) selected. The executed contract is on file at State agency*)

- Solicitation specifications
- Solicitation evaluation
- Solicitation contract terms
- Solicitation conditions
- Bidder/Offerer responses
- Evaluation Documents/Scoring Sheets
- Notification to vendors of rejected bids/offers, if applicable
- FSMC Invoices (minimum of 3 FSMC invoices selected by ARS)
- USDA Foods Reconciliation (total for prior year)
- Advisory Board documentation (includes agenda and sign in sheets)
- Reconciliation of all discounts, rebates, credits (cost reimbursable contracts only)
- Quarterly FSMC on-site monitoring

FSMC – Renewal Year (*Reviews in renewal years, review executed renewal/amendments*) Review: above items only if not reviewed in base year.

- FSMC invoices
- Advisory Board documentation (includes agenda and sign in sheets)
- Reconciliation for USDA Foods (both fixed-price & cost-reimbursable contracts)
- Reconciliation of all discounts, rebates, and credits (cost-reimbursable contracts only)

Processing *When SFAs include the procurement of processed end-products through a commercial food distributor*. *Contact the State Distributing Agency (SDA) to determine who procures processors, SDAs or SFAs. If SFAs, obtain the following documents)*

- Agreement/contract for processors
- SFA planned assistance level (from prior school year)
- SFA solicitation documents, vendor bids/responses, evaluations, and contracts
- K12 and/or Processor Link monthly reports
- Evaluation Documents/Scoring Sheets
- Contract renewals/addenda/amendments, if applicable
- Reconciliation of USDA Foods received

Supplemental Information (*Additional information related to procurement processes*)

- FSMC contract manager name and contact information
- TX-UNPS application status (CE and site)
- Self-certification for micro purchase thresholds
- Co-Op memberships
- Does Co-Op procure processing through USDA
- CE method of reconciliation
- Financial changes from the previous school year (i.e. fund type, financial system)
- How does the CE categorize purchases
- Sole-Source Vendors
- If FSMC purchases on behalf of the CE, what invoice method is utilized.

Vendor Paid List and Procurement Table

Summary

The purpose of the Vendor Paid List (VPL) is for the Contracting Entity (CE) to provide the Texas Department of Agriculture (TDA) with a list of all vendors paid by the CE during the review period.

Note: The list should only include those vendors paid with child nutrition funds that are allowable, allocable, reasonable, and necessary.

The list below provides a general list of common goods or services that CEs contract for **using child nutrition funds** and should be included in the VPL provided to TDA. This list should not be considered exhaustive. If the CE has purchased an item not shown below, then the CE must also include the vendor's name and the total amount paid to the vendor for the review period in the VPL provided to TDA.

Typical Costs to Include in the VPL

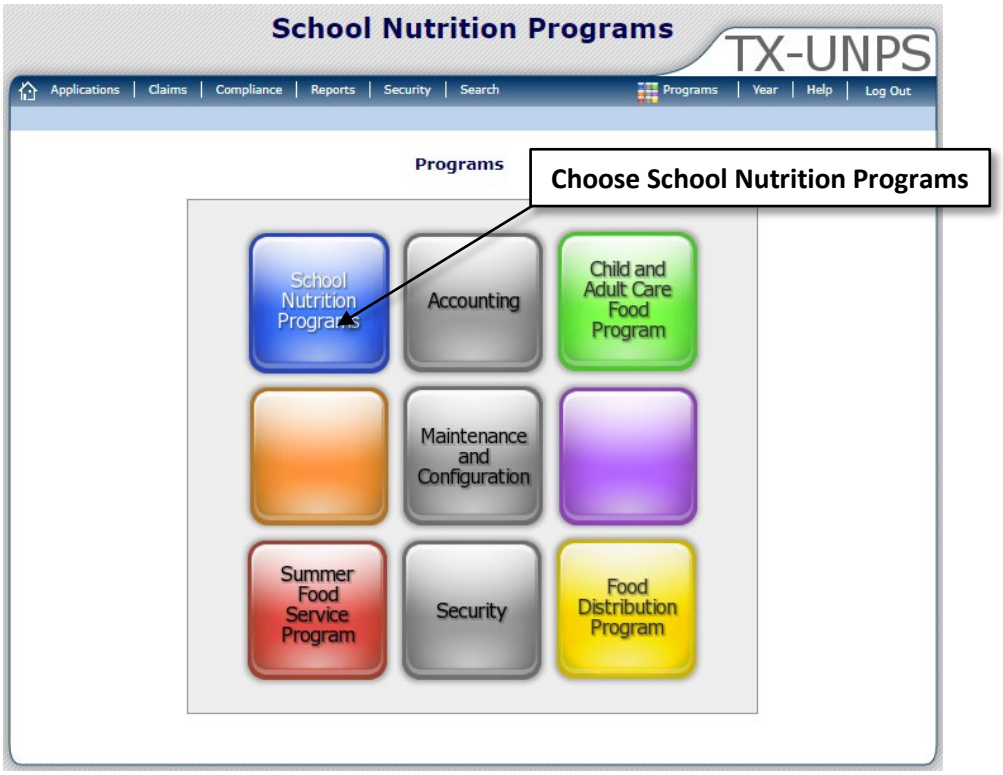
(May include but not limited to the items below)

- Equipment as defined in Title 2, *Code of Federal Regulations* (2 *CFR*), Section 200.33
  - Computer
  - Kitchen
  - Office
  - Technology Systems
- Materials and Supplies
  - Repairs
  - Rent or Leasing
  - Food
  - Cleaning supplies
  - Paper Goods
  - Disposables
  - Other Supplies as defined in 2 *CFR*, Section 200.94
- Vehicle
  - Repairs—if not performed by District personnel
  - Rentals
- Computer software and hardware
- Nutrition education supplies
- Training (if not included in the FSMC contract)
- Capital Improvements
- Building leases
- Co-op/group purchasing organizations/group buying organizations dues memberships
- Credit Cards (individual vendors must be listed)
- Utilities (electricity, waste disposal)

Typical Costs to Exclude from the VPL

- Advertising
- In-house print shop
- Interagency agreements (e.g., agreement between two government agencies)
- State and local government costs
- Mileage reimbursement for staff
- Vehicle gas
- Travel and conference reimbursements for staff
- Petty cash payments
- Student/parent refunds
- Postage

TX-UNPS Procurement Review Users Guide



Getting Started

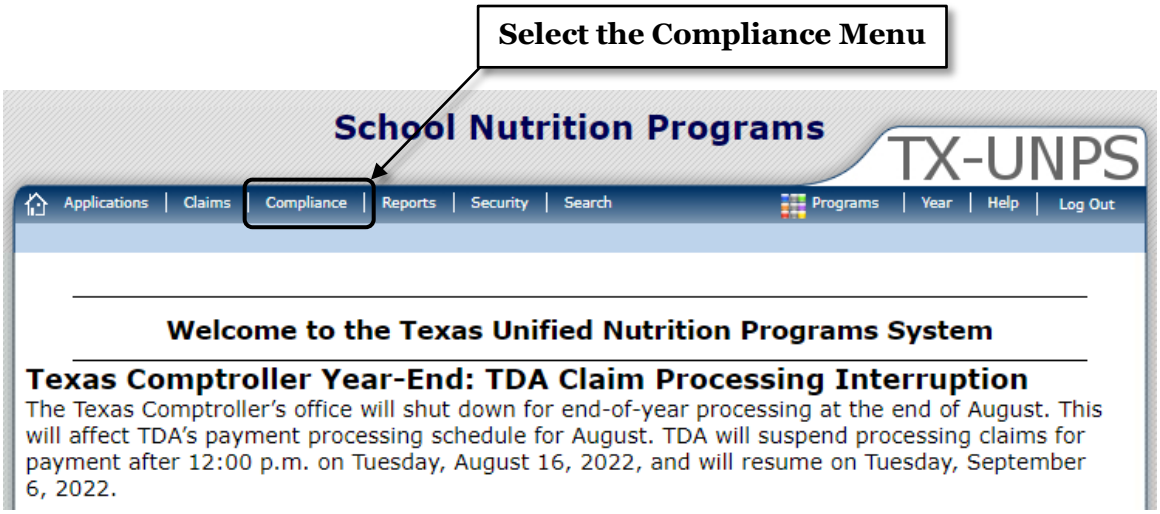
Before you can begin using TX-UNPS, you must be assigned a user ID and password that provides the required security rights.

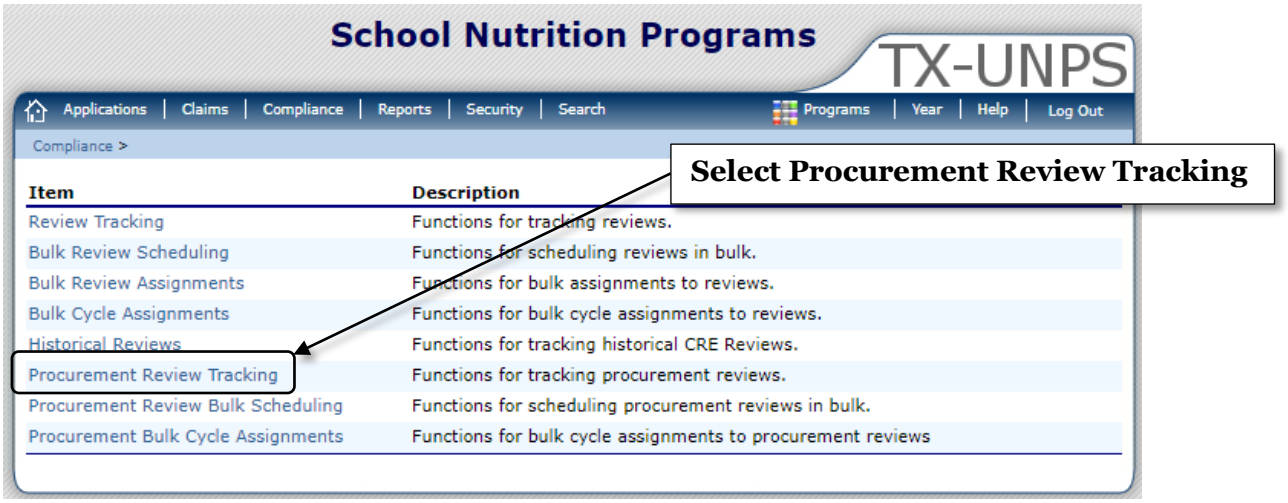
You must fill out User Access Manager (UAM) form FND - 135. Only one UAM will be established at a time within each CE.

The designated User Access Manager (UAM) is a person at your entity who is responsible for security management of users within your entity. The UAM has the ability to add, modify, and deactivate users, ensures users have the correct security permissions and help users with their password resets directly in Texas Unified Nutrition Program System (TX-UNPS).

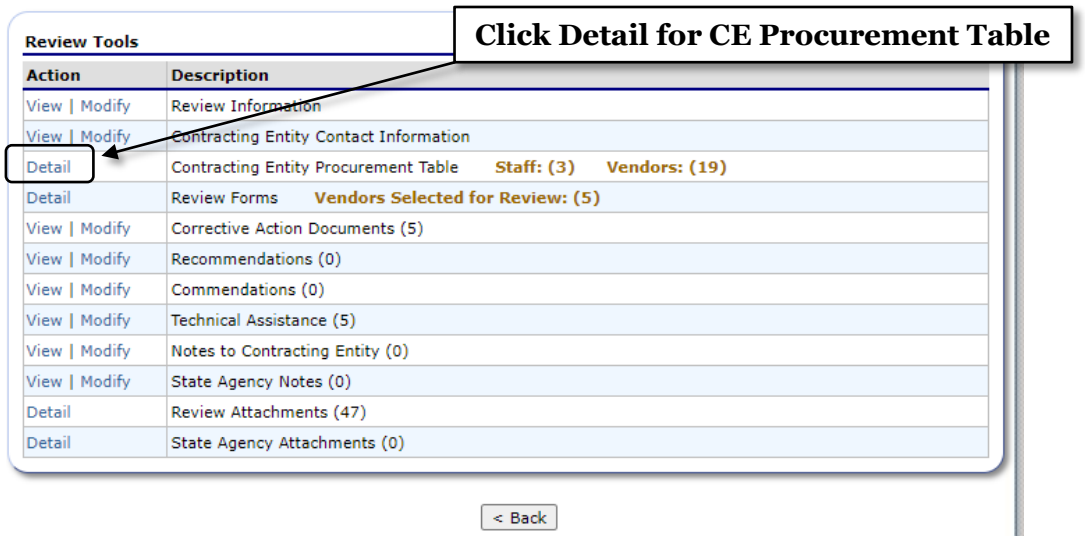
https://txunps1.texasagriculture.gov/TXUNPS/Splash.aspx

Tip: Save the link to your favorites list or create a shortcut to your desktop for quicker access.


Select the Compliance Menu
School Nutrition Programs
TX-UNPS
Applications | Claims | Compliance | Reports | Security | Search | Programs | Year | Help | Log Out
Welcome to the Texas Unified Nutrition Programs System
Texas Comptroller Year-End: TDA Claim Processing Interruption
The Texas Comptroller's office will shut down for end-of-year processing at the end of August. This will affect TDA's payment processing schedule for August. TDA will suspend processing claims for payment after 12:00 p.m. on Tuesday, August 16, 2022, and will resume on Tuesday, September 6, 2022.

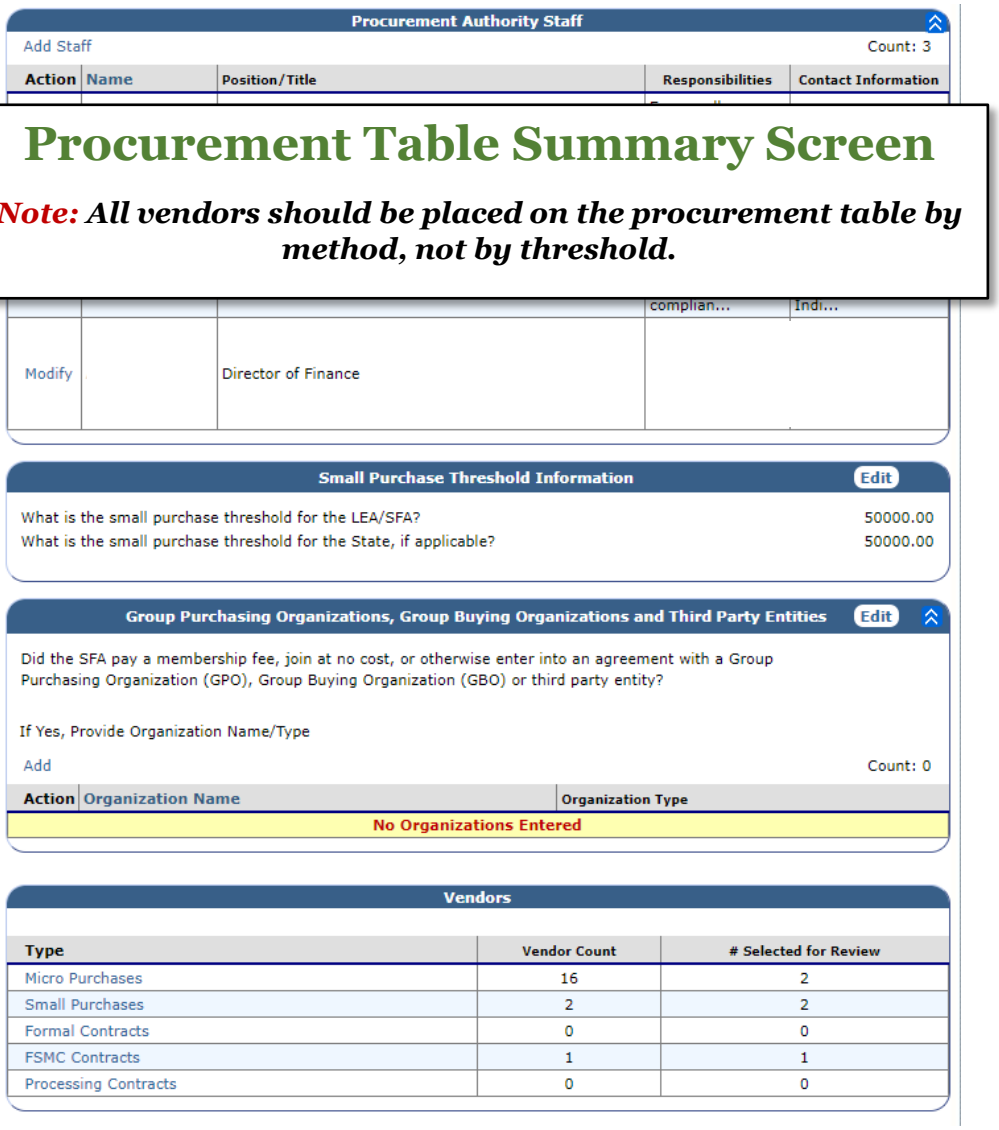

School Nutrition Programs
TX-UNPS
Applications | Claims | Compliance | Reports | Security | Search | Programs | Year | Help | Log Out
Compliance >
Select Procurement Review Tracking
Item
Description
Review Tracking
Functions for tracking reviews.
Bulk Review Scheduling
Functions for scheduling reviews in bulk.
Bulk Review Assignments
Functions for bulk assignments to reviews.
Bulk Cycle Assignments
Functions for bulk cycle assignments to reviews.
Historical Reviews
Functions for tracking historical CRE Reviews.
Procurement Review Tracking
Functions for tracking procurement reviews.
Procurement Review Bulk Scheduling
Functions for scheduling procurement reviews in bulk.
Procurement Bulk Cycle Assignments
Functions for bulk cycle assignments to procurement reviews


Applications | Claims | Compliance | Reports | Security | Search | Programs | Year | Help | Log Out
Procurement Review List >
School Year: 2021 - 2022
SNP Procurement Reviews
Click Details
Expand
Actions
Review ID
Review Year
Review Type
Lead Reviewer
Scheduled Date
Closed Date
Nbr of Vendors
Status
Details
47503
2021 - 2022
Procurement
7/26/2021
5
Open
Add New Procurement Review
< Back



Procurement Table Summary Screen

***Note:* All vendors should be placed on the procurement table by method, not by threshold.**



TX-UNPS Helper for the Procurement Table

Procurement Authority
Allows the CE to enter times that they will be unavailable.

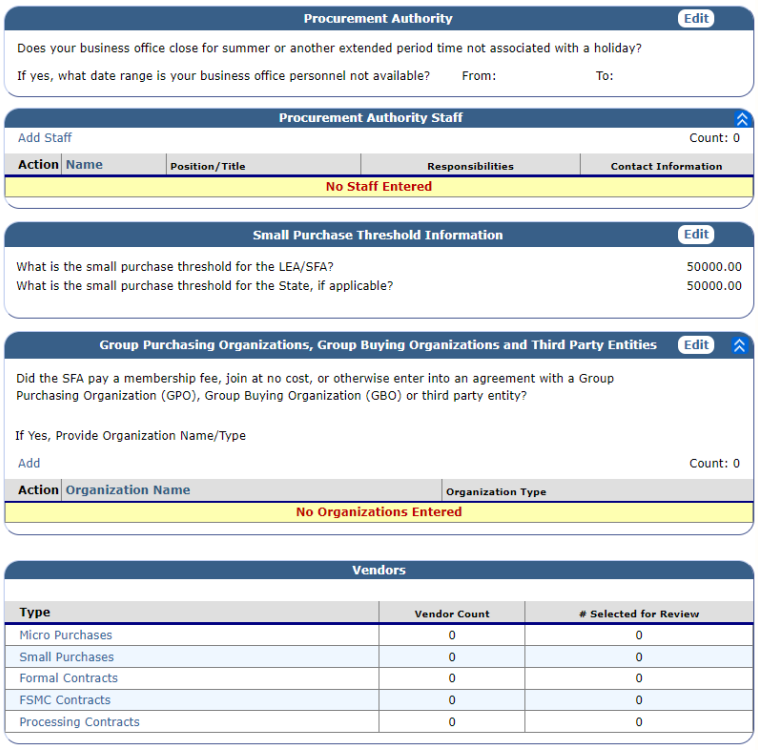
Procurement Authority Staff
CE will enter their staff that handle procurement. This should always at least include the CND and Business Manager/financial person.

Required sections include:
1. Name
2. Position/Title
3. Responsibilities
4. Contact Information

Small Purchase Threshold Information
CE should update the small purchase threshold for the LEA/SFA.

GPO, GBO or third-party entity
CE should respond either yes or no and include the name of the organization and the type.

Required sections include:
1. Organization Name
2. Organization Type



Procurement Authority Edit

Does your business office close for summer or another extended period time not associated with a holiday?

If yes, what date range is your business office personnel not available? From: To:

Procurement Authority Staff

Add Staff Count: 0

Action	Name	Position/Title	Responsibilities	Contact Information
No Staff Entered				

Small Purchase Threshold Information Edit

What is the small purchase threshold for the LEA/SFA?	50000.00
What is the small purchase threshold for the State, if applicable?	50000.00

Group Purchasing Organizations, Group Buying Organizations and Third Party Entities Edit

Did the SFA pay a membership fee, join at no cost, or otherwise enter into an agreement with a Group Purchasing Organization (GPO), Group Buying Organization (GBO) or third party entity?

If Yes, Provide Organization Name/Type

Add Count: 0

Action	Organization Name	Organization Type
No Organizations Entered		

Vendors

Type	Vendor Count	# Selected for Review
Micro Purchases	0	0
Small Purchases	0	0
Formal Contracts	0	0
FSMC Contracts	0	0
Processing Contracts	0	0

Vendors by Type

Micro Purchases

1. Required sections include:
    a. Vendor Name
    b. Vendor ID (CE can use the same number referenced in accounting documents)
    c. Goods/services provided
    d. Total amount paid to vendor
    e. Goods/services purchased (drop down)
    f. How many purchases per vendor and comments if they choose other in the drop down box.

Note: CE should NOT check the box, "selected for review". Reviewer will be responsible for determining vendors for review.

Micro Purchase Vendors

(Purchases from vendors valued at $10,000 or below.)

Add Vendor

Count: 16

Action	Vendor Name	Vendor ID	Goods/Services	Total Paid	# Purchases	Comments	Selected
Modify		287369	KITCHEN REPAIRS	$3,660.06	6	KITCHEN REPAIRS	✓
Modify		767358	APPLE DEVICE CHARGER	$62.00	1	APPLE DEVICE CHARGER	✗
Modify		586651	WATER	$1,703.33	12	WATER FOR DRINK DISPENSERS	✗
Modify		693856	CAFETERIA SUPPLIES	$1,266.51	10	CAFETERIA SUPPLIES AND SMALL WARES	✗
Modify		421986	KEYS MADE	$27.80	1	KEYS MADE FOR REPLACEMENT KEY	✗
Modify		292155	COMPUTERS	$1,820.92	1	COMPUTERS FOR CAFETERIA	✗
Modify		159369	PERMITS FOR KITCHEN	$2,000.00	5	HEALTH PERMITS FOR KITCHENS	✗
Modify		266267	DATA INTERFACE FOR POS	$2,350.00	1	DATA INTERFACE FOR POS FOR SYSTEMS DESIGN	✗
Modify		685614	FACE MASKS FOR STAFF	$1,500.00	1	FACE MASKS FOR CAFETERIA STAFF	✗
Modify		665732	STAMP	$11.98	1	STAMP FOR RECEIVING	✗
Modify		179845	PROPANE FOR FOOD TRUCK	$64.00	1	PROPANE FOR FOOD TRUCK	✗
Modify		872699	REPAIRS	$999.00	3	ICE MACHINE AND COOLER/FREEZER REPAIRS	✗
Modify		523245	CAFETERIA SUPPLIES	$134.67	1	CAFETERIA SUPPLIES	✗
Modify		677111	GROCERY PRODUCT	$3,218.82	11	GROCERY PRODUCT FOR CATERING AND MISC ITEMS	✗
Modify		767361	CLEANING PRODUCT	$1,058.53	4	CLEANING PRODUCT	✗
Modify		796687	KITCHEN EXHAUST HOOD CLEANING	$7,450.00	6	VENT/EXHAUST HOOD CLEANING	✓

Micro Purchase Vendor Analysis

	Count	Required to Review	Selected for Review
All Micro Purchase Vendors	16	2	2

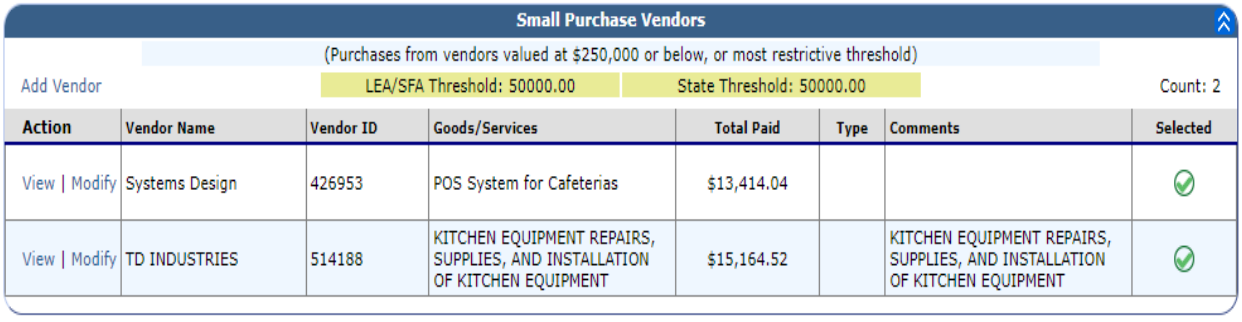
✓ Minimum selection requirements have been met.

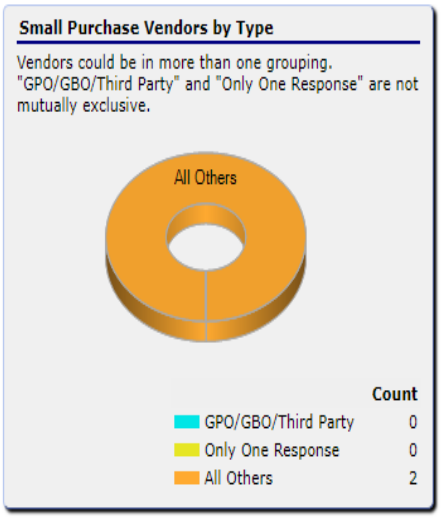
Vendors by Type

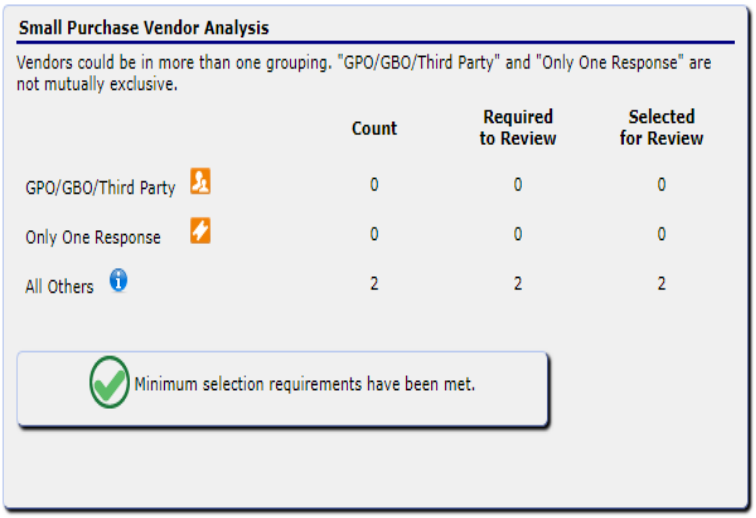
Small Purchases

1. Required sections include:
    a. Vendor Name
    b. Vendor ID (CE can use the same number referenced in accounting documents)
    c. Goods/services provided
    d. Total amount paid to vendor
    e. Goods/services purchased (drop down)
    f. One time or multiple purchases (drop down).
    g. More than one response?
    h. Contract obtained through GPO/GBO/Non-SFA only Co-Op?

Note: CE should NOT check the box, "selected for review". Reviewer will be responsible for determining vendors for review.





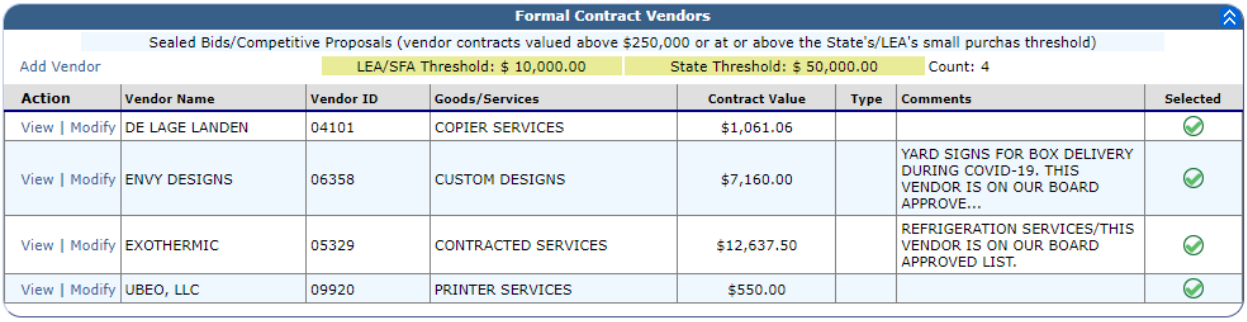


Vendors by Type

Formal Contracts

1. Required sections include:
    a. Vendor Name
    b. Vendor ID (CE can use the same number referenced in accounting documents)
    c. Goods/services provided
    d. Contract Value (total value of the contract)
    e. Comments indicating dollar amount expended
    f. Solicitation Type
    g. Contract Type
    h. Contract Duration
    i. More than one response?
    j. Contract obtained through GPO/GBO/Non-SFA only Co-Op?
    k. Amendments?

Note: CE should NOT check the box, "selected for review". Reviewer will be responsible for determining vendors for review.

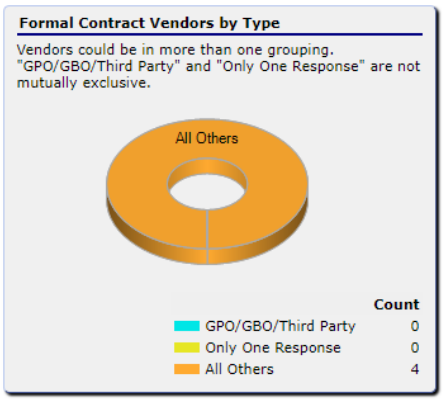


Formal Contract Vendors

Sealed Bids/Competitive Proposals (vendor contracts valued above $250,000 or at or above the State's/LEA's small purchas threshold)

Add Vendor | LEA/SFA Threshold: $ 10,000.00 | State Threshold: $ 50,000.00 | Count: 4

Action	Vendor Name	Vendor ID	Goods/Services	Contract Value	Type	Comments	Selected
View | Modify	DE LAGE LANDEN	04101	COPIER SERVICES	$1,061.06			✓
View | Modify	ENVY DESIGNS	06358	CUSTOM DESIGNS	$7,160.00		YARD SIGNS FOR BOX DELIVERY DURING COVID-19. THIS VENDOR IS ON OUR BOARD APPROVE...	✓
View | Modify	EXOTHERMIC	05329	CONTRACTED SERVICES	$12,637.50		REFRIGERATION SERVICES/THIS VENDOR IS ON OUR BOARD APPROVED LIST.	✓
View | Modify	UBEO, LLC	09920	PRINTER SERVICES	$550.00			✓

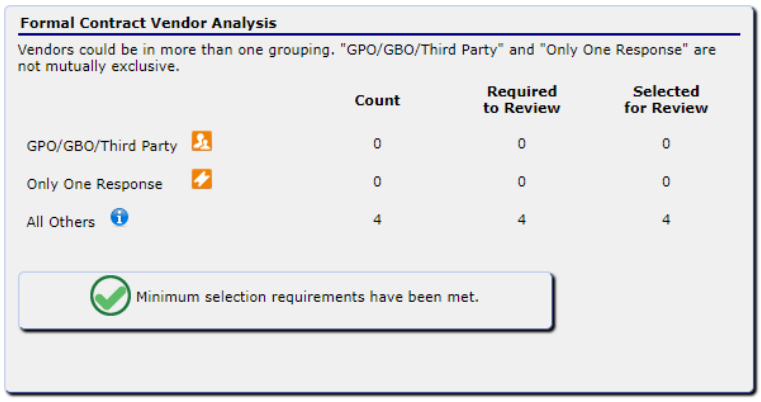


Formal Contract Vendors by Type

Vendors could be in more than one grouping. "GPO/GBO/Third Party" and "Only One Response" are not mutually exclusive.

All Others

	Count
GPO/GBO/Third Party	0
Only One Response	0
All Others	4



Formal Contract Vendor Analysis

Vendors could be in more than one grouping. "GPO/GBO/Third Party" and "Only One Response" are not mutually exclusive.

	Count	Required to Review	Selected for Review
GPO/GBO/Third Party	0	0	0
Only One Response	0	0	0
All Others	4	4	4

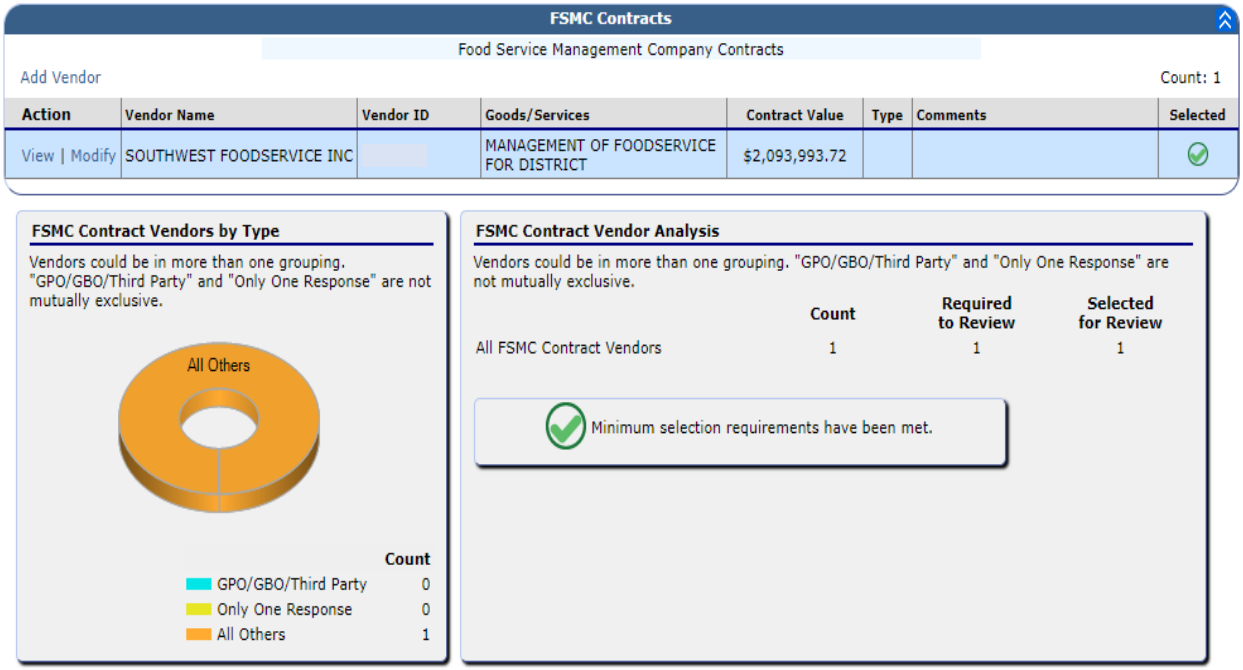
Minimum selection requirements have been met.

Vendors by Type

FSMC Contracts

1. Required sections include:
    a. Vendor Name
    b. Vendor ID (CE can use the same number referenced in accounting documents)
    c. Goods/services provided
    d. Contract Value
    e. Solicitation Type
    f. Contract Type
    g. Contract Year
    h. More than one response?
    i. Contract obtained through GPO/GBO/Non-SFA only Co-Op?
    j. Amendments?

Note: CE should NOT check the box, "selected for review". Reviewer will be responsible for determining vendors for review.

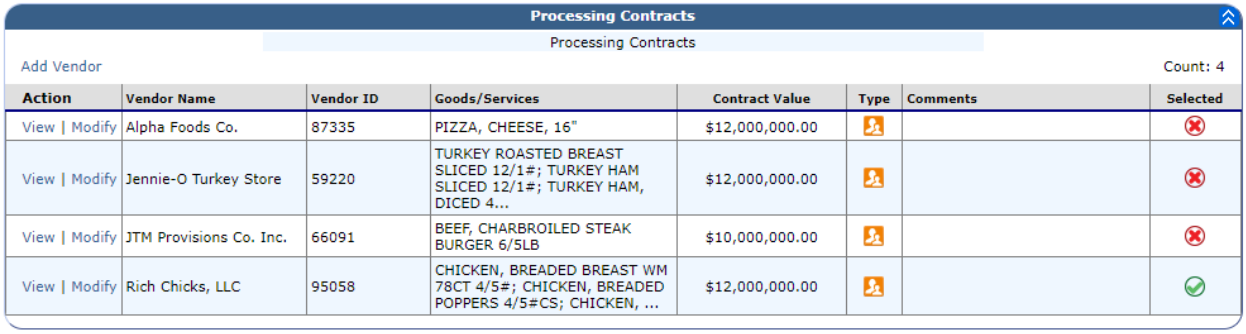


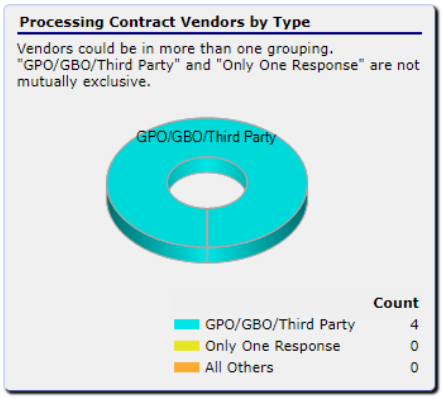
Vendors by Type

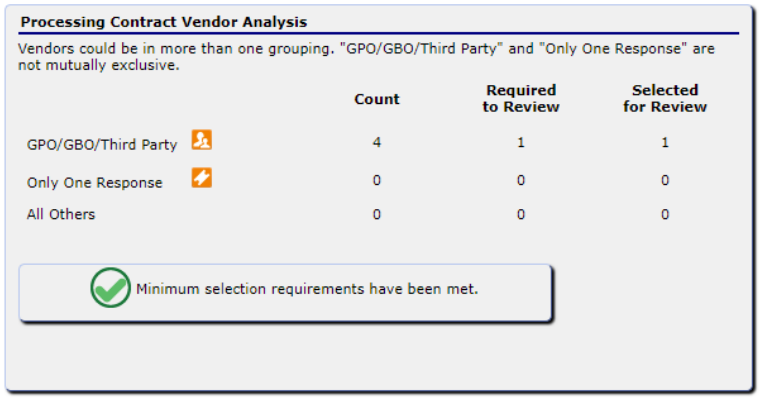
Processing Contracts

1. Required sections include:
    a. Vendor Name
    b. Vendor ID (CE can use the same number referenced in accounting documents)
    c. Goods/services provided
    d. Contract Value
    e. Procurement Type (drop down)
    f. Contract Duration (drop down)
    g. More than one response?
    h. Contract obtained through GPO/GBO/Non-SFA only Co-Op?
    i. Amendments?

Note: CE should NOT check the box, "selected for review". Reviewer will be responsible for determining vendors for review.







Sample Selection

- The required number of vendors to sample is automatically generated in TX-UNPS.
- This number is the minimum, so more vendors can be reviewed if necessary.

Micro Purchase Vendors

(Purchases from vendors valued at $10,000 or below.)

Add Vendor — Count: 16

Action	Vendor Name	Vendor ID	Goods/Services	Total Paid	# Purchases	Comments	Selected
Modify	ALLENS TRI-STATE MECHANICAL	287369	KITCHEN REPAIRS	$3,660.06	6	KITCHEN REPAIRS	✓
Modify	APPLE INC	767358	APPLE DEVICE CHARGER	$62.00	1	APPLE DEVICE CHARGER	✗
Modify	AQUAONE	586651	WATER	$1,703.33	12	WATER FOR DRINK DISPENSERS	✗
Modify	BIG PLATE RESTAURANT SUPPLIES	693856	CAFETERIA SUPPLIES	$1,266.51	10	CAFETERIA SUPPLIES AND SMALL WARES	✗
Modify	BROCK LOCK & KEY	421986	KEYS MADE	$27.80	1	KEYS MADE FOR REPLACEMENT KEY	✗
Modify	CDW GOVERNMENT INC	292155	COMPUTERS	$1,820.92	1	COMPUTERS FOR CAFETERIA	✗
Modify	CITY OF LUBBOCK	159369	PERMITS FOR KITCHEN	$2,000.00	5	HEALTH PERMITS FOR KITCHENS	✗
Modify	LONESTAR DATA	266267	DATA INTERFACE FOR POS	$2,350.00	1	DATA INTERFACE FOR POS FOR SYSTEMS DESIGN	✗
Modify	MAYFIELD PAPER CO	685614	FACE MASKS FOR STAFF	$1,500.00	1	FACE MASKS FOR CAFETERIA STAFF	✗
Modify	OFFICEWISE FURNITURE & SUPPLY	665732	STAMP	$11.98	1	STAMP FOR RECEIVING	✗
Modify	PINNACLE PROPANE	179845	PROPANE FOR FOOD TRUCK	$64.00	1	PROPANE FOR FOOD TRUCK	✗
Modify	SPECS REFRIGERATION, INC	872699	REPAIRS	$999.00	3	ICE MACHINE AND COOLER/FREEZER REPAIRS	✗
Modify	TEXAS RESTAURANT EQUIPTMENT	523245	CAFETERIA SUPPLIES	$134.67	1	CAFETERIA SUPPLIES	✗
Modify	UNITED SUPERMARKETS	677111	GROCERY PRODUCT	$3,218.82	11	GROCERY PRODUCT FOR CATERING AND MISC ITEMS	✗
Modify	WAGNER SUPPLY CO	767361	CLEANING PRODUCT	$1,058.53	4	CLEANING PRODUCT	✗
Modify	WEST TEXAS H2 PROS	796687	KITCHEN EXHAUST HOOD CLEANING	$7,450.00	6	VENT/EXHAUST HOOD CLEANING	✓

Micro Purchase Vendor Analysis

	Count	Required to Review	Selected for Review
All Micro Purchase Vendors	16	2	2

✓ Minimum selection requirements have been met.

TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

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/USDA-OASCR%20P-Complaint-Form-0508-0002-508-11-28-17Fax2Mail.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

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