Step 1: Prepare To Use the System

Step 2: Set-Up the System

Step 3: Prepare Your Menu Cycle

Step 4: Enter Your Menu Cycle Information

Step 5: Prepare For Production

Step 6: Execute Production
MENU Module Steps

Prepare To Use the System
1. Choose site(s) to launch first.
2. Submit FND 101s.
3. Prepare the information needed to configure system settings.

Set-Up the System
1. Configure system settings.

Prepare Your Menu Cycle
1. Identify data entry helpers.
2. Identify menu cycle(s).
3. Determine planned counts for all menu items in the menu cycle(s).
4. Identify menu cycle recipes.
5. Identify recipe ingredients.
6. Search the ingredient databases for ingredients, stock items, and recipes.
7. Consider your marketing strategy.

Enter Your Menu Cycle Information
1. Input all non-database ingredients and stock items.
2. Create recipes.
3. Turn all recipes into menu items.
4. Create menu templates.
5. Create daily menus.
6. Assign daily menus to menu cycles.
7. Assign menu cycles to menu lines.

Prepare For Production
1. Assign menu cycles to the calendar.
2. Print recipes (optional).
3. Print technician worksheets.
4. Set-up SchoolCafé app (optional).

Execute Production
1. Execute meal service.
2. Record information on the production record.

END
MENU Module
Prepare to Use the System

STEP 1

1. **Choose site(s) to launch first:** Create a plan for switching all of your sites to MENU Module over time.
   - Use the "Site Selection Helper" tab of the Configuration Helper Tool to help you decide which sites to launch first.*
   - **Tip:** Make this selection carefully. Ask yourself, “What is possible for me to do?” and “What will make me the most successful?”

2. **Submit FND 101s:** Decide who, from your sites, should submit a form FND-101 (for TX-UNPS and MENU Module access).
   - Use the “MENU Module Access” tab of the Configuration Helper Tool to help you decide who needs access to MENU Module.*

3. **Prepare the information needed to configure system settings:** You will need to gather the following:
   - The name and type of each site
   - The meal types offered at each site
   - The names of your menu lines
   - "Site Group" names that categorize sites based on the type of menus offered
   - Your district and/or each site’s holiday schedule
   - Names that describe the menu item categories that you will use
   - Your Hazard Analysis and Critical Control Points (HACCP)
   - Your defined Critical Control Points (CCP)
   - A list of the functions you need each user to have in the system*

*See resources page for more information.

Since configuring your settings happens in a few different places within the system, this preparatory step will save you frustration, time, and confusion when you actually configure your system settings.
Configure system settings:

Look at the following configuration settings (pre-populated from TX-UNPS) and correct any mistakes:

- Site types (Elementary School, Middle School, High School, Warehouse, Kitchen, Alternative) for all of your sites
- USDA site types (Elementary, Secondary, Combined) for each site
- Designation of each site as a “Feeding Site” or select a “Food Preparation Site” under “Configuration” for each site.
- Designation of site as a “School Café” site

Note: Site names are pre-populated from TX-UNPS.

Update the following system configuration settings in the system:

- Roles and permissions for your users*

Enter the following menu planning configuration settings into the system:

- The names of your menu lines
- Site meal types and menu lines offered
- Site groups (and all of the sites that belong to each site group)
- Your district and/or each site’s holiday schedule

Check the following menu planning configuration settings and do the following if needed:

- Add more menu item category names.
- Add more Hazard Analysis and Critical Control Points (HACCP) processes.
- Add more Critical Control Points (CCP).

Note: MENU Module comes with pre-set menu item categories, HACCP processes, and CCPs.

Tip: Many of the possible configuration settings do not impact the MENU Module portion of the software. Use your Configuration Helper Tool to help you determine what configuration settings apply to you.*

*See resources page for more information.
Prepare Your Menu

1. **Identify data entry helpers**: Assign different staff, like kitchen managers, administrative staff, and supervisory staff, to help you enter data into MENU Module. If you recruit helpers now, you can rely on their help for the remaining steps.

2. **Identify menu cycle(s)**: Collect the menu cycles for each school that will launch MENU Module first.
   - Consider breakfast, lunch, and any other meal services.
   - Include menu cycles for all of the meal lines that serve different menus.
   - **Tip**: Enter the simplest menu cycle for each site first. For example, entering shared menu cycles or breakfast menu cycles can help give you early success.

3. **Determine planned counts for all menu items in the menu cycle(s)**: Look at past production records to decide how much of each menu item to prepare.
   - **Note**: Remember to plan for enough food to last the entire meal period and the right amount of food to avoid too many leftovers.

4. **Identify menu cycle recipes**: Identify recipes for each menu item.
   - Identify the component contribution of each menu item.
   - Collect the sub-recipes (recipe within recipes) for menu items made with more than one recipe.

5. **Identify recipe ingredients**: Identify the ingredients needed for each recipe.
   - Collect CN Labels, Product Formulation Statements, Nutrition Facts Labels, invoices, and any other ingredient documentation that will help you find exact ingredients in MENU Module’s existing databases. Don’t forget to keep the Food Buying Guide (FBG) for School Meals handy!
   - **Tip**: Consider uploading ingredient documentation into MENU Module for easy access for daily use or for an Administrative Review (AR).

6. **Search the existing databases for ingredients, stock items, and recipes**: Make sure to document the ingredients, stock items, and recipes you use as in MENU Module’s existing databases.
   - **Tip**: Search for ingredients, stock items, and recipes in the “TDA Shared” database first. The “Child Nutrition Database” also contains ingredients and the “Cybersoft” database contains USDA recipes.
   - **Tip**: Make each ingredient a stock item to track meal costs and to record the ingredient weight on the food production record.

7. **Consider your marketing strategy**: To utilize MENU Module to the fullest and market your program to students and parents, prepare the following:
   - Photos of each item listed on your menu
   - Marketing names for each menu item
   - **Tip**: The marketing name should entice students to try the menu item.
   - A plan to use the School Café app

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*See the next page to learn how menu cycles, menus, menu items, recipes, and ingredients work together in MENU Module.
Ingredients: Make up recipes.
Recipes: Become menu items.
Menu Items: Make up menus.
Menus: Make up menu cycles.

**Recipe**
A recipe can contain one or many ingredients and may contain a recipe within a recipe.

**Menu Item**
In MENU Module, every menu item corresponds to a single system recipe.

**Menu (Daily)**
A menu usually contains at least four menu items but can contain more.

**Menu Cycle**
A six-week menu cycle usually contains 30 daily menus.
**MENU Module**

**Enter Your Menu Cycle Information**

1. **Input all non-database ingredients and stock items:** Enter ingredients and stock items that you cannot find in MENU Module’s existing databases. These ingredients and stock items save to your local database.

2. **Create recipes:**
   1. Create single item recipes.
   2. Create dual (multiple) item recipes.
   3. Create recipes made with more than one recipe.

3. **Turn recipes into menu items:** You must turn recipes into menu items before you can assign them to menus. A few unique actions related to creating a menu item include the following:
   - Rename the menu item (if you do not want to use the recipe name).
   - List the meal component contribution.
   - Create a marketing name.
   - Upload photos of each menu item (optional).

4. **Create menu templates:** Menu templates can contain items that you always serve, such as milk, to help you to create menus faster.

5. **Create daily menus:** Create daily menus using menu templates. Do the following when you enter daily menus:
   - List projected planned counts for menu items.
   - Choose the number of menu items students may select from each menu item category. For example, you may allow students to choose two fruits but only one entrée.

6. **Assign daily menus to menu cycles:** Create your menu cycles by assigning daily menus to a day and/or week in your menu cycle.

7. **Assign menu cycles to menu lines:** Assign your menu cycle to a specific menu line.

**COMPLIANCE STEPS**

**Upload ingredient documentation:** Upload ingredient documentation for your ingredients to easily access the documents for daily use and for ARs.

**Create stock items:** Turn ingredients that you use (those from existing databases and those that you create in your local database) into stock items or enter price information for existing stock items. Turning all of your ingredients into stock items allows you to generate meal-costing reports that help you track meal costs and to produce compliant Food Production Records.

**OPTIONAL STEPS**

**Create stock items:** Turn ingredients that you use (those from existing databases and those that you create in your local database) into stock items or enter price information for existing stock item. Turning all of your ingredients into stock items allows you to generate meal-costing reports that help you track meal costs and to produce compliant Food Production Records.

**Upload ingredient documentation:** Upload ingredient documentation into MENU Module for easy daily access for daily use or for ARs. If you use a “TDA Shared Ingredient” create a local copy of the ingredient or turn the ingredient into a stock item in order to upload meal documentation for each ingredient in your local database.

**ASSIGNMENT STEPS**

**Upload ingredient documentation:** Upload ingredient documentation for your ingredients to easily access the documents for daily use and for ARs.

**Create stock items:** Turn ingredients that you use (those from existing databases and those that you create in your local database) into stock items or enter price information for existing stock item. Turning all of your ingredients into stock items allows you to generate meal-costing reports that help you track meal costs and to produce compliant Food Production Records.

*See the previous page to learn how menu cycles, menus, menu items, recipes, and ingredients work together in MENU Module.*
Assign menu cycles to the calendar: In this step, you must enter the planned counts for each menu item and choose a menu cycle for a specific set of calendar days. When you assign a menu cycle to the calendar, you can do the following:

- Access the menu cycle recipes in a format that works well for production.
- Access technician worksheets.
- Publish your menu in School Café (if you have set up the app).
  - This happens automatically when you assign a menu cycle to the calendar.

Note: See below for more information on setting up the School Café app.

Print recipes (optional): Print production recipes for staff if you want staff to prepare recipes using printed recipes. Print recipes in Spanish as needed.

Print technician worksheets: Technician worksheets provide information that staff need to complete production and spaces for staff to record required food production information.

Set-up SchoolCafé app (optional): If you decide to use the SchoolCafé app, you will need to set it up.

Tip: Set aside some time to set up the SchoolCafé app and to familiarize yourself with the app in order to manage the app appropriately.
Execute meal service: Now you are ready to take all of your menu cycles and to put them into action. Do not forget to smile big. You have just taken huge steps towards making food production easier and more appealing to your customers!

Record information on the production record: Gather the completed daily technician worksheets and use the information to record meal service information such as amounts of ingredients used to prepare menu items, leftovers, and more on the electronic food production record.

Congratulations!
You launched MENU Module.
Resources

Configuration Helper Tool
Consider what happens when you use a website or app to track your calories. For the website or app to give you correct information, you need to provide the app with some specific information about yourself. For example, you might provide the website or app with your weight, height, and age information.

MENU Module works similarly to gather specific district and site information so that when you start using the system, MENU Module is customized to your unique situation. This customization is called configuration.

TDA has developed a simple tool to help CEs get started in MENU Module and address configuration in one place.

This tool can help CEs make important decisions and serve as a gathering place for all of the required configuration information. Among many things, this tool can help CEs choose which sites to transition to MENU Module first.

The Configuration Helper Tool is available under “Training” on the Menu Module webpage of SquareMeals.org.

Useful Documentation
From first accessing MENU Module to creating your menu cycles, don’t forget to keep these items at your fingertips:

1. A list of your sites and the staff and positions working there
2. A document detailing your district and/or each site’s holiday schedule
3. A list of the names of your menu item categories
4. A list of your menu line names
5. A document detailing your Hazard Analysis and Critical Control Points (HACCP)
6. A document detailing your defined Critical Control Points (CCP)
7. Menu cycles and plans for all of your lines
   - Details the daily menu for each day of the cycle period
8. A list of all of your menu items
9. All of your recipes
10. A list of the specific ingredients in your menu cycles and accompanying documentation
    - CN labels
    - Nutrition Facts Labels
    - Product Manufacturer statements
    - Invoices
11. Past Food Production Records to help you determine your planned counts
12. Photos of each menu item (optional)

Note: Every single menu item requires a recipe.

Roles and Permissions
Visit the “Quick Guide: System Roles in MENU Module” section of the Cheat Sheet: Configuration. The “Quick Guide: System Roles in MENU Module” helps you understand the roles (or types of access) for users in MENU Module. The cheat sheet provides a description of each type of role and can help you decide which role fits your needs best.

The Cheat Sheet: Configuration is available under “Training” on the Menu Module webpage of SquareMeals.org.
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