[VIDEO] Enter Site Visit Reviews

1. Click the **Select Center** drop-down menu and select the center to review.

2. Click the **Tools** menu and select **List Reviews**. The List Reviews window opens.

3. Click **Add**. The Add a New Review window opens to the General tab by default.

4. In the **General** tab:

   a. Click the **Date** box and select the review date. This box defaults to today's date. The date you set here also sets the date in the **Next Review** box. The next review date is set for four months from the current review date, unless you indicate that a follow-up visit is required. If a follow-up visit is required, the date in the Next Review box is set for two weeks from the current review date.

   b. Click the **Type** drop-down menu and select the type of review you are conducting. For example, if this is the first time you are reviewing this center, you would select **1st Review**.

   c. Check any of the following boxes that apply to this review:
      - Followup Required
      - Unnaounced
      - 3 Year Detailed Review
      - Attempted Review
      - Desk Review

   d. Click the **Notes for Next Review** box and enter any notes for the next scheduled review.

   e. Click the **Monitor** drop-down menu and select the monitor who completed the review.

   f. Click the **Monitor Arrival Time** and **Monitor Departure Time** boxes and enter the time the monitor arrived at the center and the time they departed from the center.

   g. In the **Block Claim** section, indicate whether this was a review for block claims.

   h. In the **Training** section, check the box next to each item that applies.

   i. Click the **Eval Grade** box and enter the review grade.

   j. Click the **Review Comments** box and enter any comments about this review.

5. Click the **Meal** tab.

6. In the **Meals** tab:

    a. Record attendance by classroom, age group, or center total. The method you use is subject to Policy R.4

    > Note: You can skip entering counts in the table and enter totals directly below the table if totals are all you need. The total served count will be compared to the meal counts recorded by the center for that meal on that day (subject to Policy R.2).

    b. Click the **Reviewed Meal** drop-down menu and select the meal that was reviewed. If you did not review a meal, select **No Meal**. If you select no meal, go to **Step 7**.

    c. Click [...] next to each meal component and record the foods that were served for each age group. CX can cross-check the foods the monitor enters with the foods the center recorded (subject to Policy R.3).

    d. In the **Milk Inventory On Hand** section, check the **Pre-Serving** or **Post Serving** box. Then, enter the milk totals accordingly.

Edit a Review   Center Jess Center 123

General | **Meal** | Disallow

Reviewed Meal : [Breakfast ▼]

[Non - Infant Foods]

Milk (Age 2+ years)	Non-Fat/Low Fat 1% or ...
Milk (Age 1 year)	...
Bread / Alt	Cheerios ...
☐ Is this whole grain-rich ?	
Veg	...
Fruit	Blueberries ...
Meat / Alt	Egg ...

[Milk Inventory On Hand]

☐ Pre-Serving
☑ Post Serving

Gallons 1%/Skim Milk	3
Gallons Whole Milk	0
Gallons Milk Total	3.00
Gallons Milk Substitute	0

Classroom	Attendance	Served Count
Blue	5	5

[Infants 0-5 Months]

Breast Milk / Formula	Breast Milk / Iron Fort. In ...

	5	5
Totals	Attendance count	Served count*
	5	5

☐ Over Capacity   Child Enrollment Count [6]

Special Notes

Charles Dickens was absent due to illness.

[Infants 6-11 Months]

Breast Milk / Formula	Breast Milk / Iron Fort. In ...
Infant Cereal	Infant Rice Cereal ...
Meat	Infant Yogurt ...
Vegetable	...
Fruit	Applesauce ...

* - Processor Edit Check per Policy R.2

[Delete]   [Save] [Close]

7. If you have disallowances, click the **Disallow** tab. If you do not have disallowances, go to **Step 9**.

> **Note:** Only use the Disallow tab if meals need to be disallowed as a result of the monitor visit.

8. In the **Disallow** tab, you can:

   a. Disallow a range of meals:

      i. In the **Disallow a Range of Meals** section, set starting and ending dates to disallow. For example, you could disallow meals served between February 4th and February 6th.

      ii. Check the box next to each age group to disallow.

      iii. Check the box next to each meal to disallow. Each meal you check in the **Starting Date** category is disallowed from the start date to the end date. Each meal you check in the **Ending Date** category is disallowed on the end date only.

      iv. Click the **Disallow Reason** drop-down menu and select the reason these meals are disallowed. You must have previously set up review disallow reasons to populate this menu. For more information, see Review Disallow Reasons.

      v. Check the box next to any of the following that apply:

         ▪ 5 Day Attendance Problem

         ▪ Closed

         ▪ Corrective Action Visit

         ▪ Corrective Action Started

      vi. Click the **Corrective Action Notes** box and enter any notes about corrective action you are taking with the center.
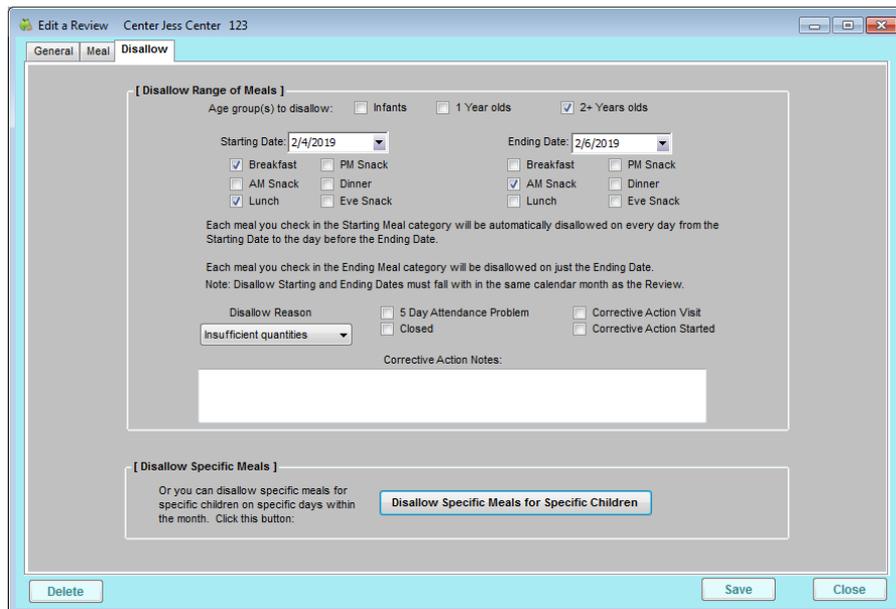
b. Disallow specific meals for specific children:

    i. Click **Disallow Specific Meals for Specific Children** at the bottom of the tab. The Manually Disallow Meals window opens.

    ii. Click **Add Disallow**.

    iii. Double-click the date to disallow on the calendar. The Disallow Meals dialog box opens.
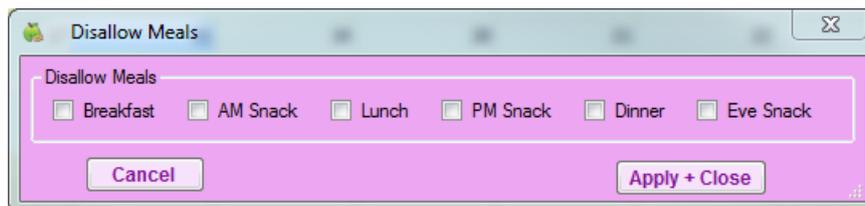
    iv. Check the box next to each meal to disallow for the selected date.

    v. Click **Apply + Close**.

    vi. In the **Children Affected** section, check the box next to each age group to which this applies. To select specific children, check the **Specific Children** box. Then click **Select Children** and select the children.

    vii. Click the **Disallow Reason** drop-down menu and select the disallow reason.

    viii. Click **Save**.

  ix. Click **Close**.

9. Click **Save**.