[VIDEO] Enter Site Visit Reviews

Last Modified on 09/17/2020 8:00 am CDT

- 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.

💑 Add a New Review Jess Center 123	
General Meal Disallow Date: 9/17/2020 Type: Select	[Monitor] Monitor Arrival Time: Monitor Departure Time: Monitor Departure Time: Block Claim] [Block Claim Visit Block Claim Visit Block Claim Legtimate [Training Offered Training Offered Building for Future Present Civit Rights info displayed
	Save

- 5. Click the Meal tab.
- 6. In the Meals tab:
 - 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.

				Reviewed Meal : B	ireakfast	•	
			[Non - Infant Foods]	[Milk	Inventory On Hand]	
			Milk (Age 2+ years)	Non-Fat/Low Fat 1% or	<u> </u>	Pre-Serving	
e:		Served Count	Milk (Age 1 year)			Post Serving	
Classroom	Attendance	Served Count	Bread / Alt	Cheerios		Gallons 1%/Skim Milk	3
Blue	5	5		Is this whole grain-rick	h ?	Gallons Whole Milk	0
			Veg			Gallons Milk Total	3.00
			Fruit	Blueberries		Gallons Milk Substitute	0
			Meat / Alt	Egg			
				-33			
			- [Infants 0-5 Months	1			
			Breast Milk / Formula	Breast Milk / Iron Fort. In			
	5	5	Classes C 44 Marsh	- 1			
Totais Atte	endance count	Served count*	[Infants 6-11 Month	s j Breast Milk / Iron Fort, In			
Totala Allo	5	5		Infant Rice Cereal			
				Infant Yogurt			
Over Capacity	Child Enrollme	ent Count 6		Infant Yogurt			
	ial Notes		Vegetable				
Charles Dickens was absen	t due to illness.		Fruit	Applesauce	<u> </u>		
	t Check per Policy						

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.

Edit a Review Center Jess Center 123 General Meal Disallow	
[Disallow Range of Meals] Age group(s) to disalow: Infants 1 Year olds Starting Date: 2/4/2019 IF Breakfast PM Snack IF Breakfast Dinner IF Breakfast Dinner IF Breakfast Dinner Lunch Exe Snack	
[Disallow Specific Meals] Or you can disallow specific meals for specific children on specific days within the month. Click this button: Disallow Specific Meals for Specific Children	
Delete	Close

- b. Disallow specific meals for specific children:
 - 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.

Gisallow Meals				23
Disallow Meals Breakfast AM Snack	Lunch	PM Snack	Dinner	Eve Snack
Cancel			Apply	+ Close

- 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.

27 28 29 30 31 February 01 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 March 01 2 3 4 5 6 7 8 9 sallow Reason sallowance Reasons Sets For This Month: Varm Only Days Count 1 Date Entered Disallow Reason Affected Days Warn Deletered	Sunday	Monday	Tuesday	Wednesday	Thursday	_	Friday	Saturday	
a 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 March 01 2 3 4 5 6 7 8 9 salow Reson Warn Only Days Count 1 one was in attendance Warn Only Days Count 1 Date Entered Disalow Reason Affected Days Warn Delete 1	-	-	-		mursuay	21			1
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			r or rins month.		Affected		Dave V	/arn Delete	
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- ix. Click Close.
- 9. Click Save.