

# *Step by Step Instruction: How to Create a Benefit Issuance Document (BID)*

Professional Standards Learning Codes  
3110, 3120  
Length: 1 hour



**Released August 2016**

"How to Create a Benefits Issuance Document" is intended for the School Food Authorities in the State of Arizona. All regulations are specific to operating the National School Lunch Program under the direction of the Arizona Department of Education. **1**

# *Step by Step Instruction: How to Create a Benefit Issuance Document*

## **Intended Audience and Content**

- This *How-To-Guide* is intended for Local Educational Agencies (LEAs) operating the National School Lunch Program (NSLP) who are required to collect student eligibility documentation.
- The following slides provide guidance on how to create a Benefit Issuance Document (BID) to record eligibility determinations.
- Attendees are expected to already understand how to certify students for meal benefits prior to reviewing this How-To-Guide.
- ***Please review these How-To-Guides before continuing:***
  - [\*Step by Step Instruction: How to Process Household Applications \(SY 16-17\)\*](#)
  - [\*Step by Step Instruction: Introduction to CNP Direct Certification in CNP Direct Certification/Direct Verification\*](#)
  - [\*Step by Step Instruction: How to Conduct Direct Certification Using Other Documentation\*](#)

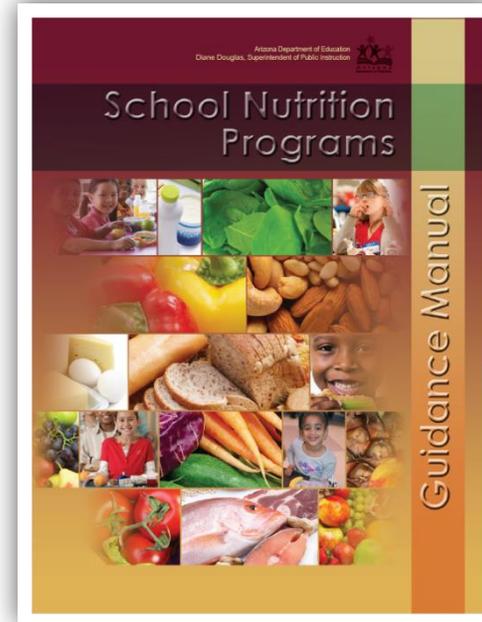
# *Step by Step Instruction: How to Create a Benefit Issuance Document*

## **Objectives**

At the end of this training, attendees should be able to:

- read a Benefit Issuance Document (BID);
- understand what is required on a BID;
- record individual student eligibility information on the BID; and
- understand how to update an individual student's eligibility information on the BID.

# Step by Step Instruction: How to Create a Benefit Issuance Document



The instruction within this How-To-Guide is based on guidance from ADE's School Nutrition Programs Guidance Manual, 2015.

- Section 3.7- Eligibility Documentation (pages 31-32)

*It is recommended to review this section of the manual in addition to reviewing this training. Click [here](#) to access ADE's School Nutrition Programs Guidance Manual, 2015*

*Step by Step  
Instruction:  
How to Create  
a Benefit  
Issuance  
Document*

## **Handouts for Training**

*At this time, please print off the handouts **Sample BID** and **SY 16-17 Enrollment List**. You will need these handouts to complete this training.*

SAMPLE BID				

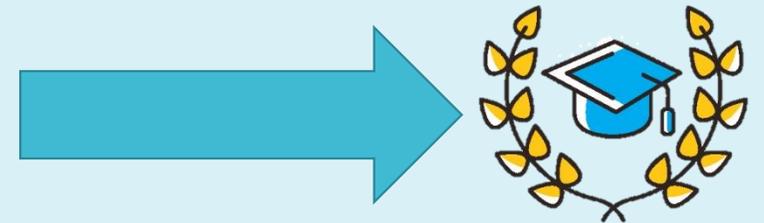
[Sample BID](#)

SY 16-17 ENROLLMENT		
First Name	Last Name	School Name
Wiley	Coyote	Dry Desert High
Dusty	DeVil	Dry Desert High
Hermione	Granger	Dry Desert High
Brock	Lee	Dry Desert High
Harry	Potter	Dry Desert High
Ron	Weasley	Dry Desert High
William	Weasley	Dry Desert High

[SY 16-17 Enrollment List](#)

## *Comprehension Check*

- Throughout this guide there will be comprehension quiz questions to test your knowledge and help you apply what you're learning.
- Be sure to review these quiz questions and the answers, available within the guide.
- This icon will indicate a comprehension quiz question, and the background of the slides will be a light blue like you see on this slide.



*Step by Step  
Instruction:  
How to Create  
a Benefit  
Issuance  
Document*

## Definitions

- **Student Eligibility Category:** The type of meal benefit a student is certified for. This will be either free, reduced, or paid.
- **Student Eligibility Documentation:** The paperwork or forms the LEA has on file that support why each student is receiving free, reduced-price, or paid meals.
- **Benefit Issuance Document:** The document that summarizes the meal benefit each student receives, the documentation that is on file supporting that benefit eligibility, and the date the documentation was processed.

*Step by Step  
Instruction:  
How to Create  
a Benefit  
Issuance  
Document*

*The Step by Step Instruction will review:*

Introduction to the BID	Slides 9-15
Creating the BID	Slides 16-49
Updating the BID	Slides 50-58
Coding the BID	Slides 59-65
Questions and Answers	Slides 66-71

*The following slides will only cover how-to instructions for creating the BID. Please refer back to the [ADE Online Training Library](#) for other How-To-Guides regarding methods to certify students for meal benefits.*

# Introduction to the Benefit Issuance Document

## Eligibility Determinations and Documentation

Based on the eligibility documentation the LEA has on file, each enrolled student in your school is assigned a meal benefit category (free, reduced, or paid).

- We have learned in the previous *How-To-Guides* that specific eligibility documentation will certify a child for free or reduced meal benefits.

MEAL BENEFITS DOCUMENTATION		
FREE	REDUCED	PAID
CNP Direct Certification Match Results	Household Application based on Income	No documentation on file
Liaison Lists for Homeless, Migrant, Runaway		Submitted incomplete Household Application
Household Applications (Case number, income, foster)		Submitted Household Application where income is too high
Agency Documentation		

# Introduction

## Benefit Issuance Document

- All eligibility determinations should be recorded on a Benefit Issuance Document (BID).
- A BID is a list of all students at your organization that you determined have either free or reduced meal benefits.
- *It is recommended to include all enrolled students (Free, Reduced and Paid).*

BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/16
DeVil	Dusty	Reduced	Income App	9/17/16
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/16
Potter	Harry	Free	Foster App	9/3/16
Weasley	Ron	Free	DC SNAP	7/16/16
Weasley	William	Free	DC SNAP	7/16/16

# Introduction

## Benefit Issuance Document

- The BID contains the:
  - first and last name of the student,
  - the meal benefit status,
  - the method used to determine their benefits (application, direct certification etc.),
  - and the date it was determined.
    - This would be the date the application was processed by the determining official, when CNP Direct Certification was conducted, or when the agency/liaison list was received.
- *If the LEA has more than one site operating, a column should be added for site name.*

BID				
Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/16
DeVil	Dusty	Reduced	Income App	9/17/16
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/16
Potter	Harry	Free	Foster App	9/3/16
Weasley	Ron	Free	DC SNAP	7/16/16
Weasley	William	Free	DC SNAP	7/16/16

# Introduction

## How to Read a BID

Each column is a required part of a BID and each row is a student.

For example,

- *Dusty DeVil has reduced meal benefits due to an income application.*
- *The income application was certified on 9/17/16.*



BID				
Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/16
DeVil	Dusty	Reduced	Income App	9/17/16
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/16
Potter	Harry	Free	Foster App	9/3/16
Weasley	Ron	Free	DC SNAP	7/16/16
Weasley	William	Free	DC SNAP	7/16/16

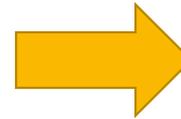
# Introduction

## How to Read a BID

Each column is a required part of a BID and each row is a student.

For example,

- *Hermione Granger receives paid meal benefits because there is no documentation on file for her.*



BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/16
DeVil	Dusty	Reduced	Income App	9/17/16
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/16
Potter	Harry	Free	Foster App	9/3/16
Weasley	Ron	Free	DC SNAP	7/16/16
Weasley	William	Free	DC SNAP	7/16/16

# Introduction

## How to Read a BID

Each column is a required part of a BID and each row is a student.

For example,

- *Brock Lee receives free meal benefits because he matched in the TANF column in CNP Direct Certification.*
- *The CNP Direct Certification was run on 8/15/16.*



BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/16
DeVil	Dusty	Reduced	Income App	9/17/16
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/16
Potter	Harry	Free	Foster App	9/3/16
Weasley	Ron	Free	DC SNAP	7/16/16
Weasley	William	Free	DC SNAP	7/16/16

# Creating the Benefit Issuance Document (BID)

# Creating the BID

## Creating the BID

- Before we create our own BID, let's work together to complete the Sample BID.
- If you have not done so already, please print out the *Sample BID* and *SY 16-17 Enrollment List*.

SAMPLE BID				

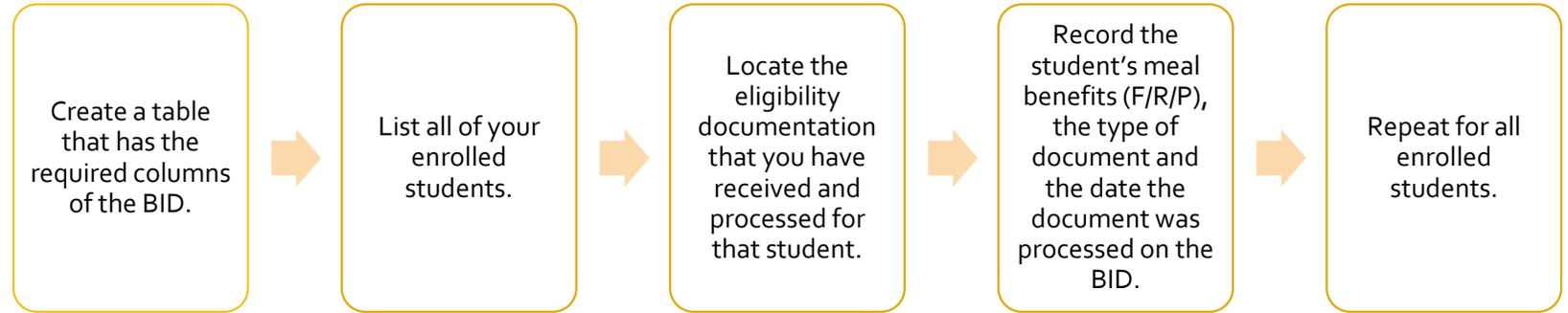
Sample BID

SY 16-17 ENROLLMENT		
First Name	Last Name	School Name
Wiley	Coyote	Dry Desert High
Dusty	DeVil	Dry Desert High
Hermione	Granger	Dry Desert High
Brock	Lee	Dry Desert High
Harry	Potter	Dry Desert High
Ron	Weasley	Dry Desert High
William	Weasley	Dry Desert High

SY 16-17 Enrollment List

# Creating the BID

## Creating the BID

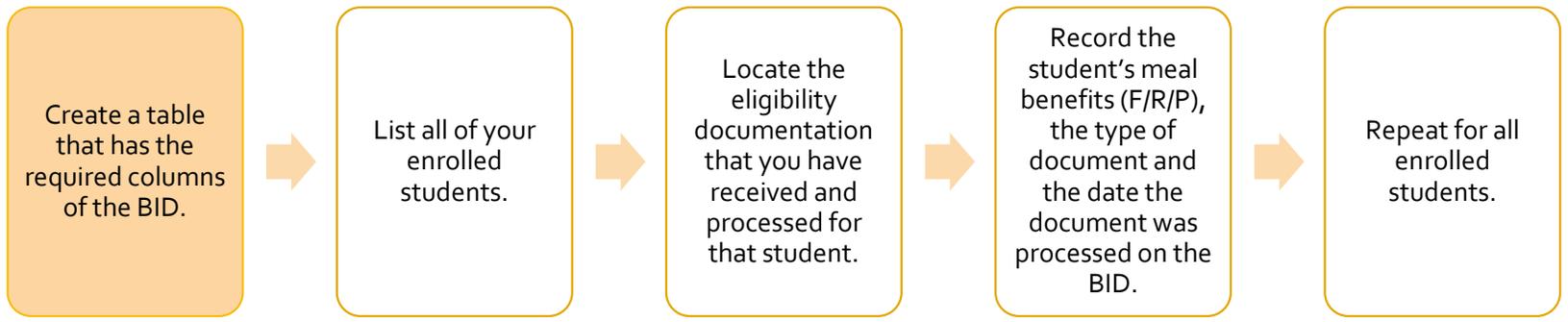


SAMPLE BID			



- Together we will fill in the *Sample BID* following the steps listed above.
- The pencil will help you follow where information was filled into the *Sample BID*.
- At anytime, you may go back to the previous slides.

# Creating the BID



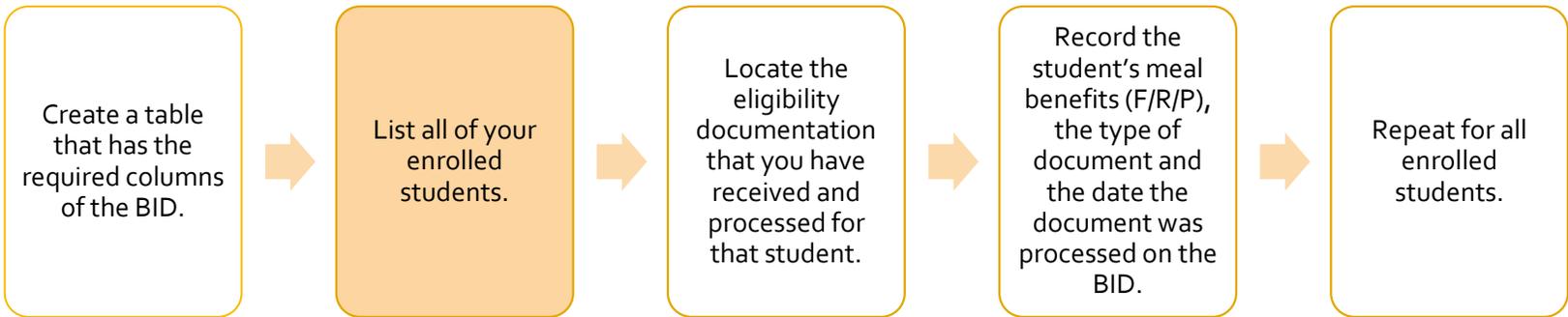
On the top row of the *Sample BID*, label each column:

- Last Name
- First Name
- Benefit Status
- Method/Documentation
- Certification Date

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date



# Creating the BID

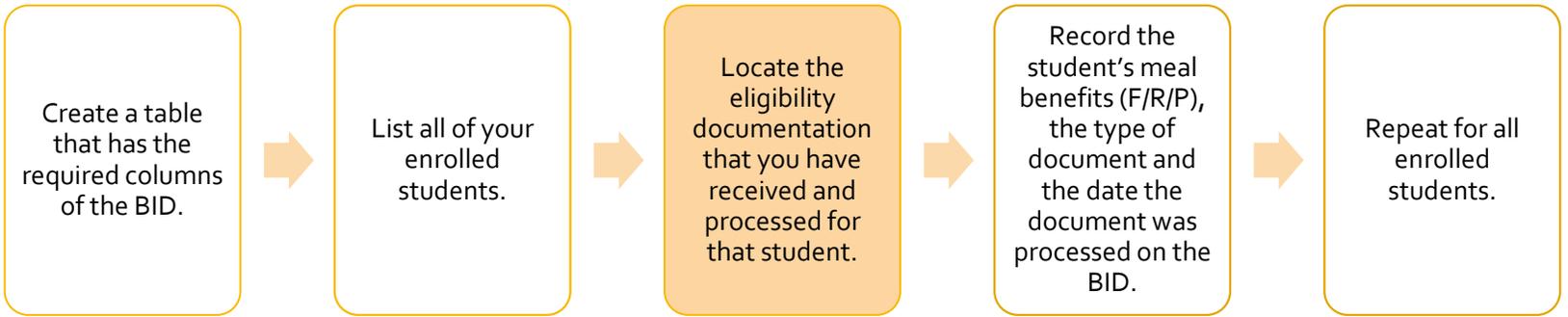


Using the [SY 16-17 Enrollment List](#), list all of the student's names in the columns titled *Last Name*, and *First Name*.

- In this example, names have been listed in alphabetical order by last name.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley			
DeVil	Dusty			
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

# Creating the BID



We will now enter individual student information into the columns titled:

- *Benefit Status,*
- *Method/Documentation,*
- and
- *Certification Date*

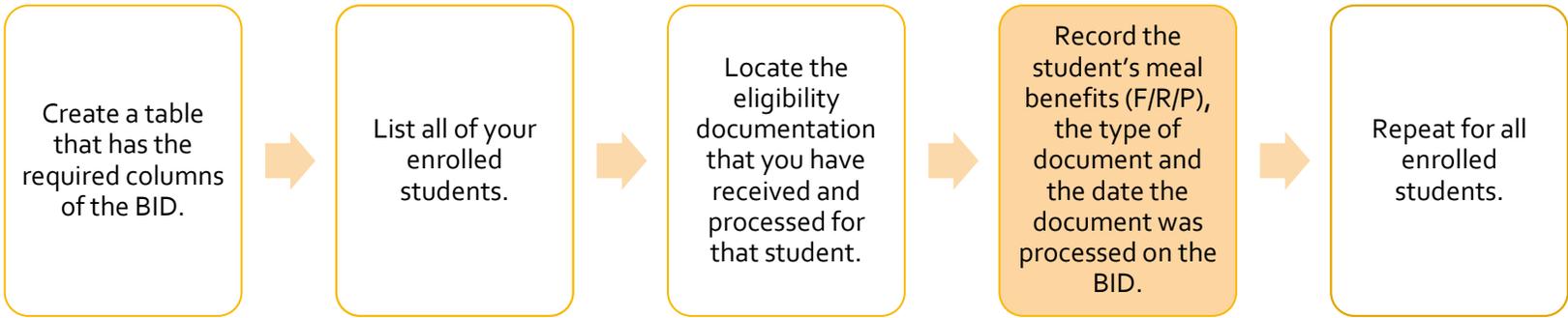
Let's first start with Wiley Coyote. The next slide will provide a screen shot of his application.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley			
DeVil	Dusty			
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			





# Creating the BID



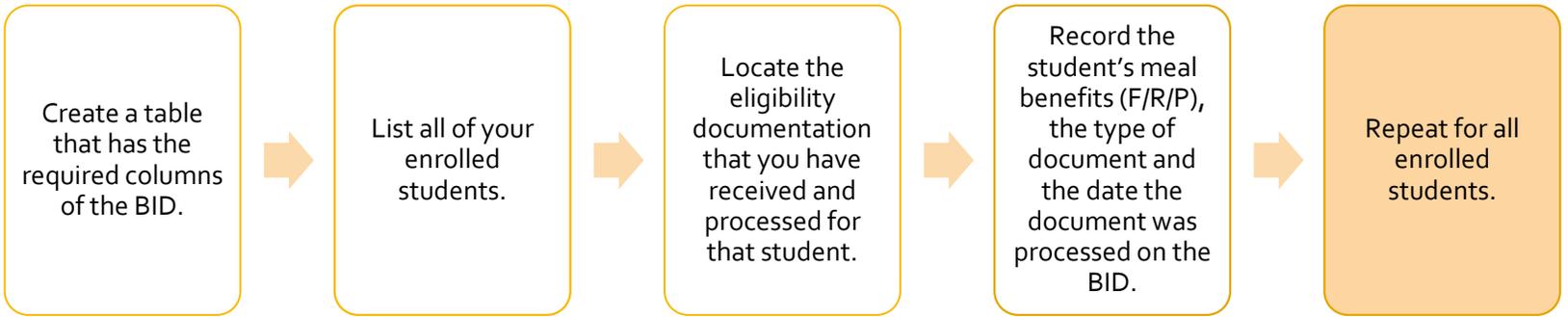
Record the information on the row for **Wiley Coyote**.

- Under *Benefit Status* record **Free**.
- Under *Method/Documentation* record **Income Application**.
- Under *Certification Date*, record the date the application was processed, **8/7/16**.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty			
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			



# Creating the BID



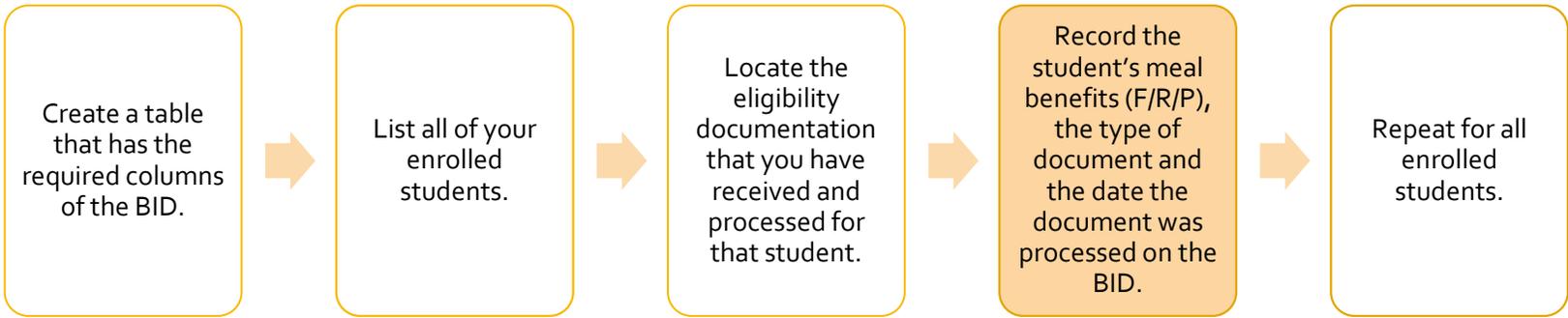
All of the required information for Wiley Coyote has been entered into the BID.

Now, we will enter information for **Dusty DeVil**.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty			
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			



# Creating the BID



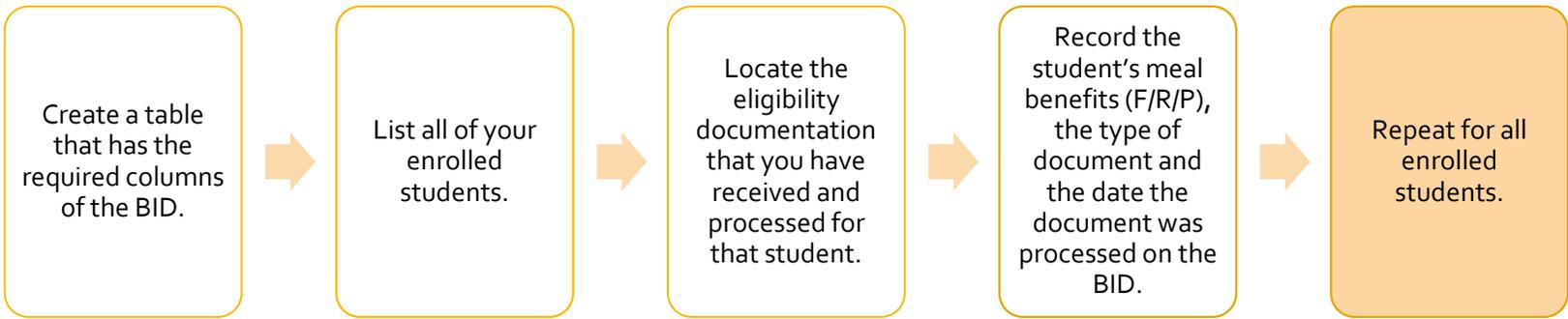
Record the information on the row for **Dusty Devil**.

- Under *Benefit Status* record **Reduced**.
- Under *Method/Documentation* record **Income Application**.
- Under *Certification Date*, record the date the application was processed, **9/17/16**.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			



# Creating the BID

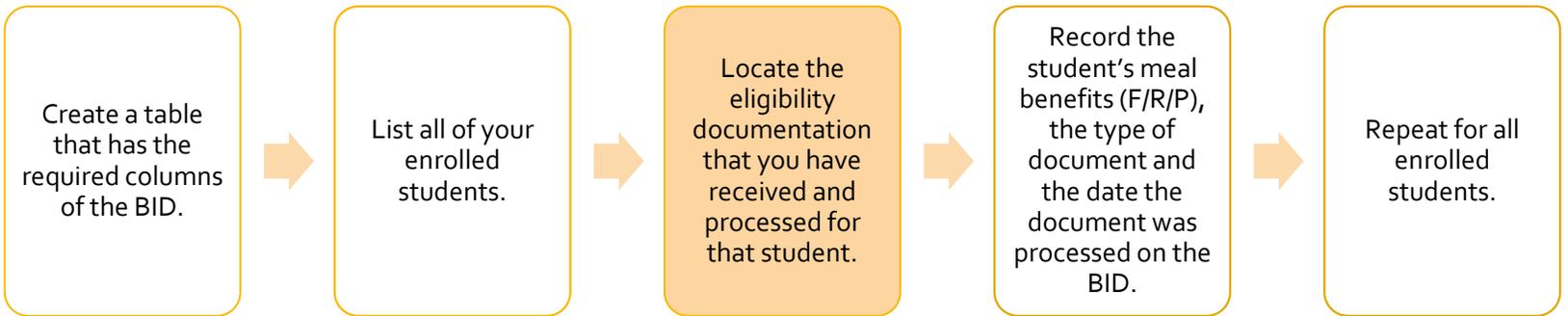


All of the required information for Dusty DeVil has been entered into the BID.

Now, we will enter information for **Hermione Granger**.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

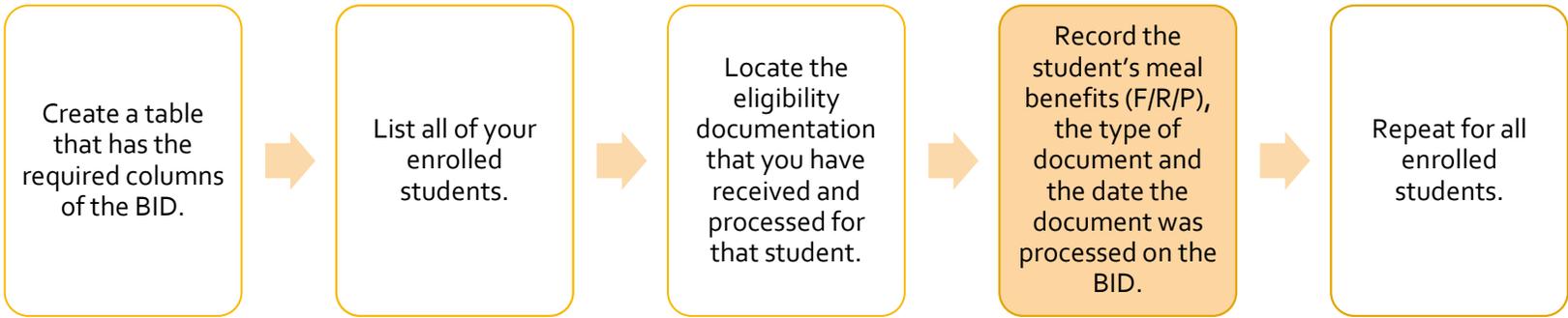
# Creating the BID



## Hermione Granger

- She and none of her household members matched on CNP Direct Certification.
- Her household did not submit a household application.
- Her name is not listed on any liaison lists, other agency documentation, etc.
- **Since there is no documentation on file for Hermione Granger, she stays paid.**

# Creating the BID

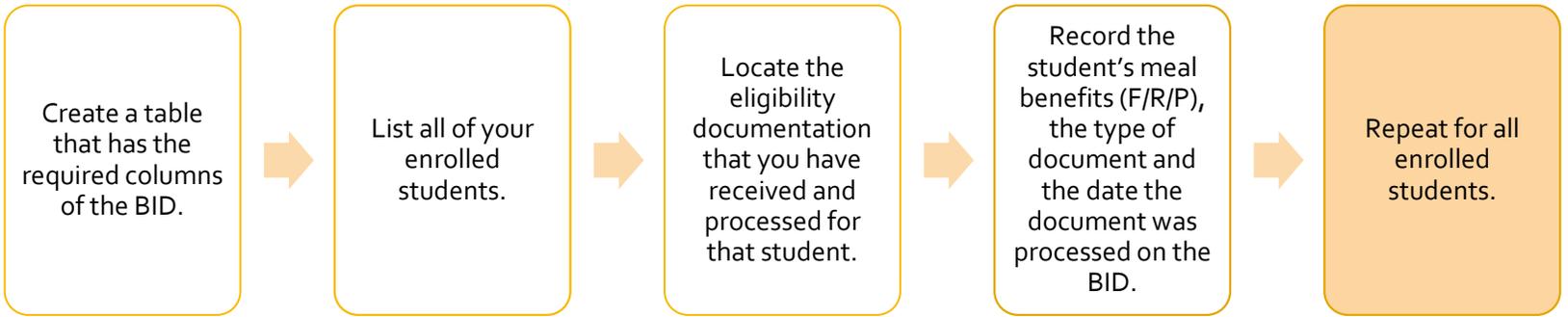


Record the information on the row for **Hermione Granger**.

- Under *Benefit Status* record **Paid**.
- Under *Method/Documentation* you may leave this blank or record **No Documentation**.
- Under *Certification Date*, leave blank.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

# Creating the BID

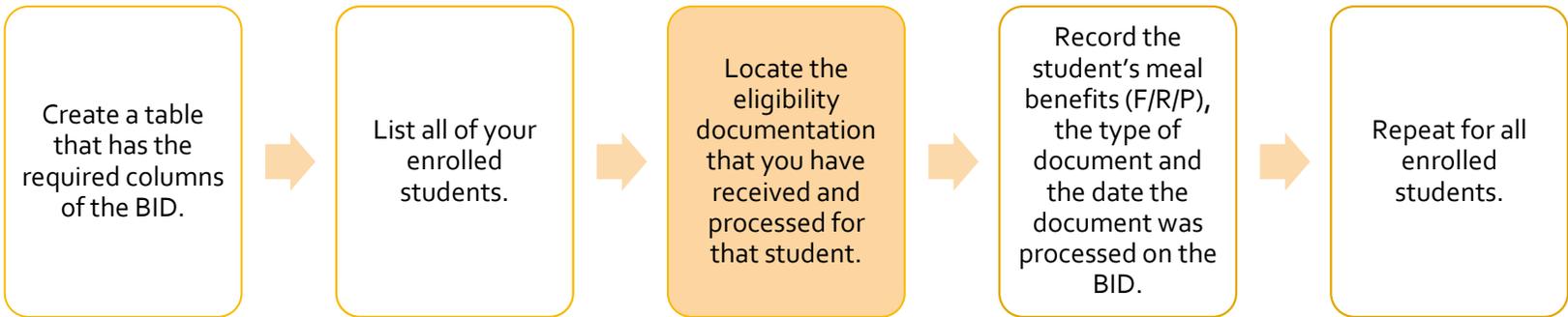


All of the required information for Hermione Granger has been entered into the BID.

Now, we will enter information for **Brock Lee**.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

# Creating the BID



## Brock Lee

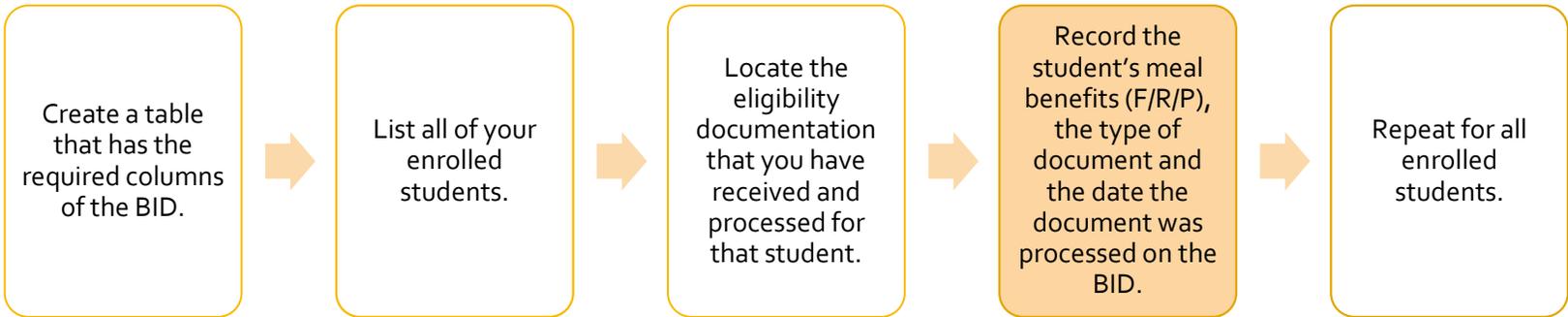
- On file, there is a printed **CNP Direct Certification match result list** that was run on **7/15/16**. He was a match in the **TANF** column.

Processed as:	<b>Standard</b>		
Prepared by:	<b>Joan Hill</b>	Date Prepared:	<b>7/15/2016 10:29AM</b>
Direct Verification:	<b>No</b>	Displaying:	<b>Matches , Non-Matches</b>
Records Processed:	<b>7</b>	Validation Errors Found:	<b>0</b>
Matches Found:	<b>1</b>	Non-Matches Found:	<b>6</b>
SNAP Matches:	<b>0</b>	MA Matches:	<b>0</b>
TANF Matches:	<b>1</b>	Foster Matches:	<b>0</b>
BIA Matches:	<b>0</b>	Migrant Matches:	<b>0</b>

Record Number ^	First Name	Last Name	Birthdate	DES Results	DES Decision Date	SNAP	TANF	MA	FOSTER
1	Wiley	Coyote	02/15/2001	No Match					
2	Dusty	DeVil	09/08/2001	No Match					
3	Hermione	Granger	10/31/2000	No Match					
4	Brock	Lee	12/01/1999	Match			Y		
5	Harry	Potter	08/09/2001	No Match					
6	Ron	Weasley	04/06/2000	No Match					
7	William	Weasley	11/08/1999	No Match					



# Creating the BID



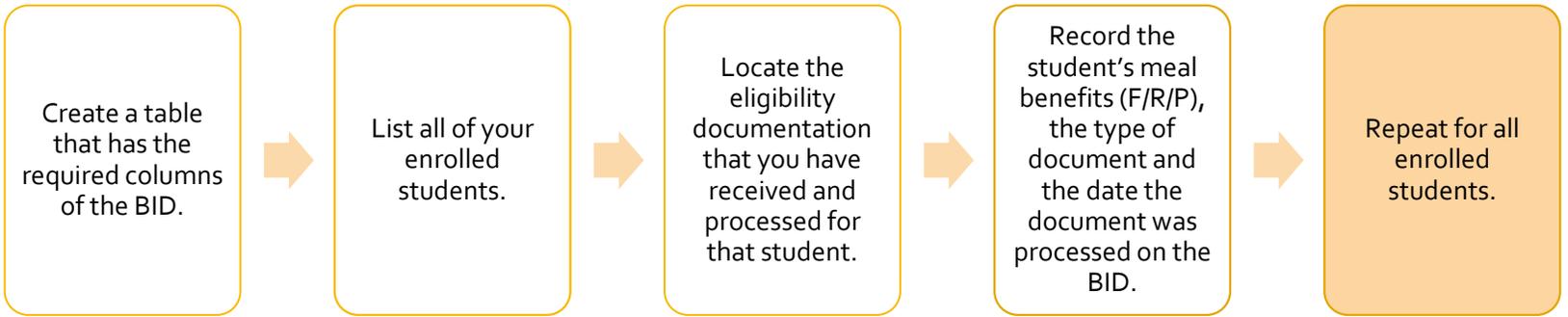
Record the information on the row for **Brock Lee**.

- Under *Benefit Status* record **Free**.
- In the column titled *Method/Documentation* we will write **DC-TANF**. DC is short for Direct Certification and TANF is the category the match (Y) was in.
- Under *Certification Date*, record the date DC was conducted, **7/15/16**.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock	Free	DC- TANF	7/15/16
Potter	Harry			
Weasley	Ron			
Weasley	William			

Continue

# Creating the BID



All of the required information for Brock Lee has been entered into the BID.

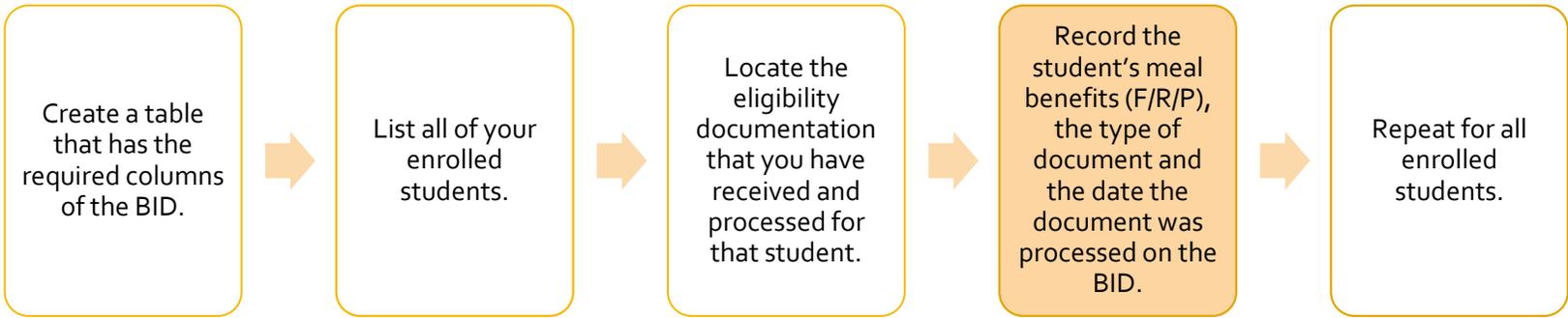
Now, we will enter information for **Harry Potter**.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock	Free	DC- TANF	7/15/16
Potter	Harry			
Weasley	Ron			
Weasley	William			





# Creating the BID

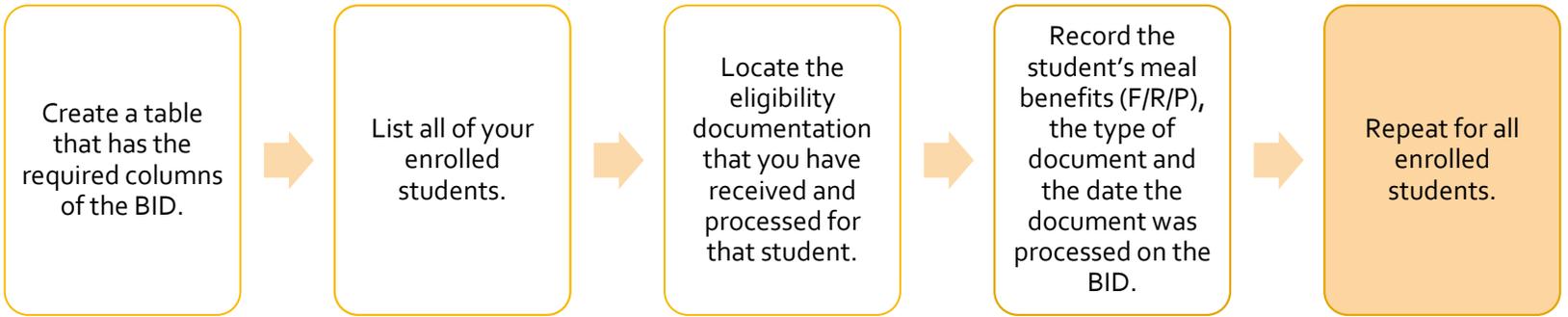


Record the information on the row for **Harry Potter**.

- Under *Benefit Status* record **Free**.
- Under *Method/Documentation* record **Foster Application**.
- Under *Certification Date*, record the date the application was processed, **9/3/16**.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock	Free	DC- TANF	7/15/16
Potter	Harry	Free	Foster Application	9/3/16
Weasley	Ron			
Weasley	William			

# Creating the BID



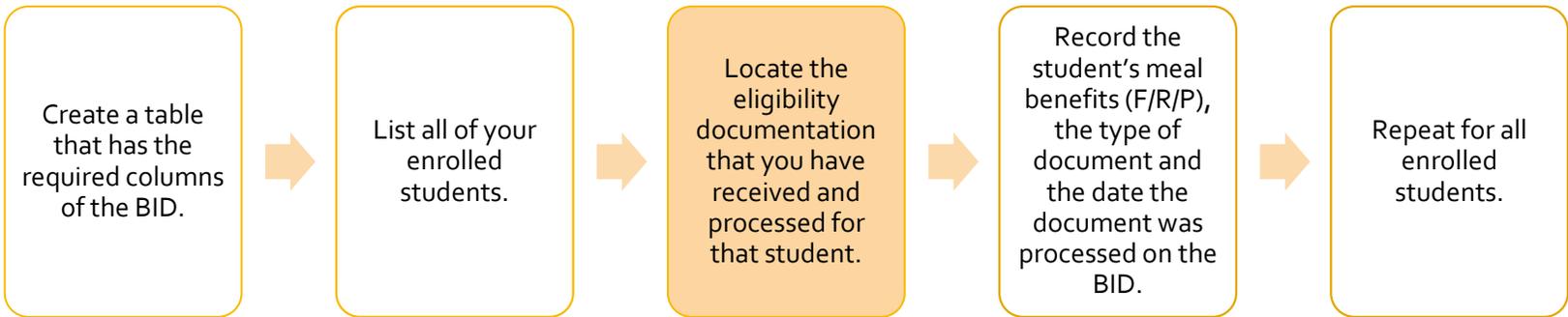
All of the required information for Harry Potter has been entered into the BID.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock	Free	DC- TANF	7/15/16
Potter	Harry	Free	Foster Application	9/3/16
Weasley	Ron			
Weasley	William			

Now, we will enter information for **Ron Weasley**.



# Creating the BID



## Ron Weasley

- On file, there is a printed **CNP Direct Certification match result list** that was run on **9/25/16**. He was a match in the **SNAP** and **TANF** column.

Processed as:	<b>Standard</b>		
Prepared by:	<b>Joan Hill</b>	Date Prepared:	<b>9/25/2016 1:46PM</b>
Direct Verification:	<b>No</b>	Displaying:	<b>Matches , Non-Matches</b>
Records Processed:	<b>7</b>	Validation Errors Found:	<b>0</b>
Matches Found:	<b>2</b>	Non-Matches Found:	<b>5</b>
SNAP Matches:	<b>1</b>	MA Matches:	<b>0</b>
TANF Matches:	<b>2</b>	Foster Matches:	<b>0</b>
BIA Matches:	<b>0</b>	Migrant Matches:	<b>0</b>

Record Number ^	First Name	Last Name	Birthdate	DES Results	DES Decision Date	SNAP	TANF	MA	FOSTER
1	Wiley	Coyote	02/15/2001	No Match					
2	Dusty	DeVil	09/08/2001	No Match					
3	Hermione	Granger	10/31/2000	No Match					
4	Brock	Lee	12/01/1999	Match			Y		
5	Harry	Potter	08/09/2001	No Match					
6	Ron	Weasley	04/06/2000	Match		Y	Y		
7	William	Weasley	11/08/1999	No Match					



# Creating the BID

Create a table that has the required columns of the BID.

List all of your enrolled students.

Locate the eligibility documentation that you have received and processed for that student.

Record the student's meal benefits (F/R/P), the type of document and the date the document was processed on the BID.

Repeat for all enrolled students.

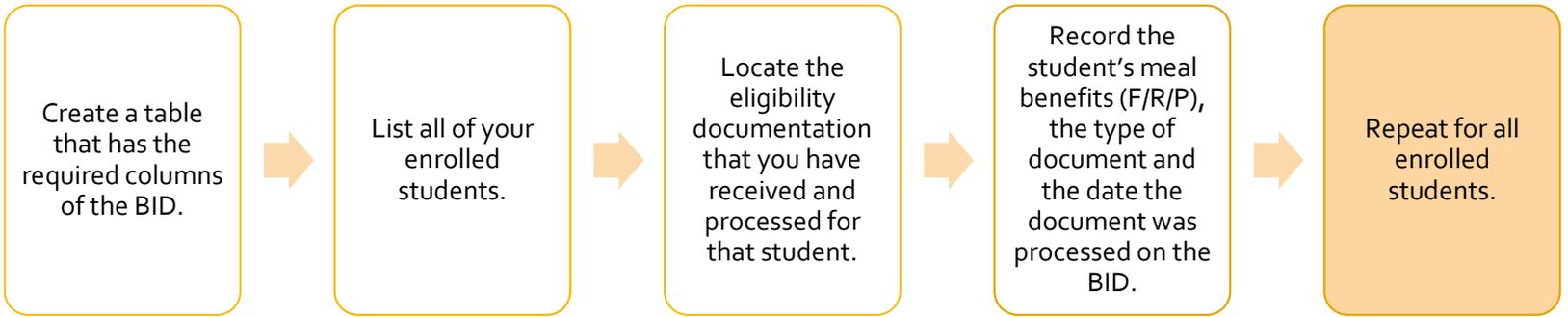
Record the information on the row for **Ron Weasley**.

- Under *Benefit Status* record **Free**.
- In the column titled *Method/Documentation* we will write **DC-SNAP**. Even though he also matched in TANF, you will always default to SNAP. Anytime a student matches in SNAP and another category, always record SNAP on your BID.
- Under *Certification Date*, record the date DC was conducted, **9/25/16**.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock	Free	DC- TANF	7/15/16
Potter	Harry	Free	Foster Application	9/3/16
Weasley	Ron	Free	DC- SNAP	9/25/16
Weasley	William			

Continue

# Creating the BID



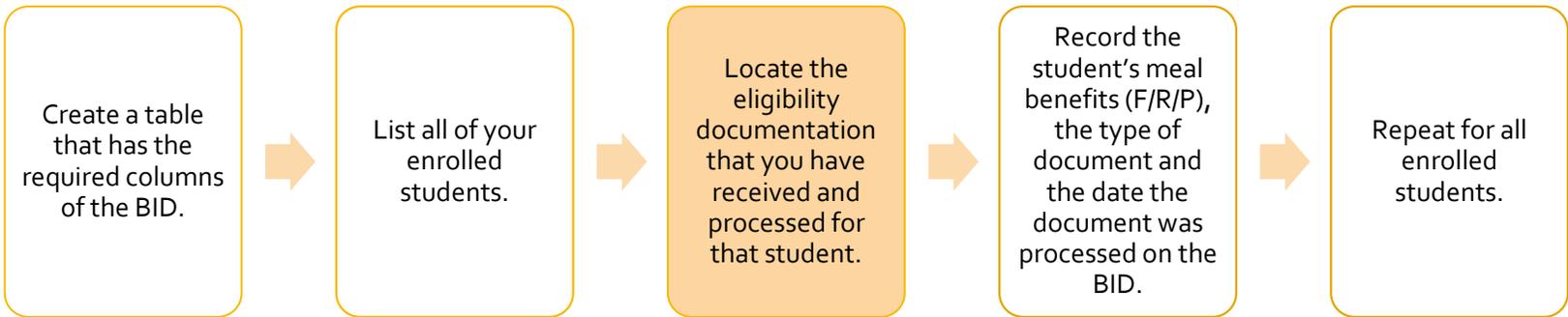
All of the required information for Ron Weasley has been entered into the BID.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock	Free	DC- TANF	7/15/16
Potter	Harry	Free	Foster Application	9/3/16
Weasley	Ron	Free	DC- SNAP	9/25/16
Weasley	William			

Now, we will enter information for **William Weasley**.



# Creating the BID



## William Weasley

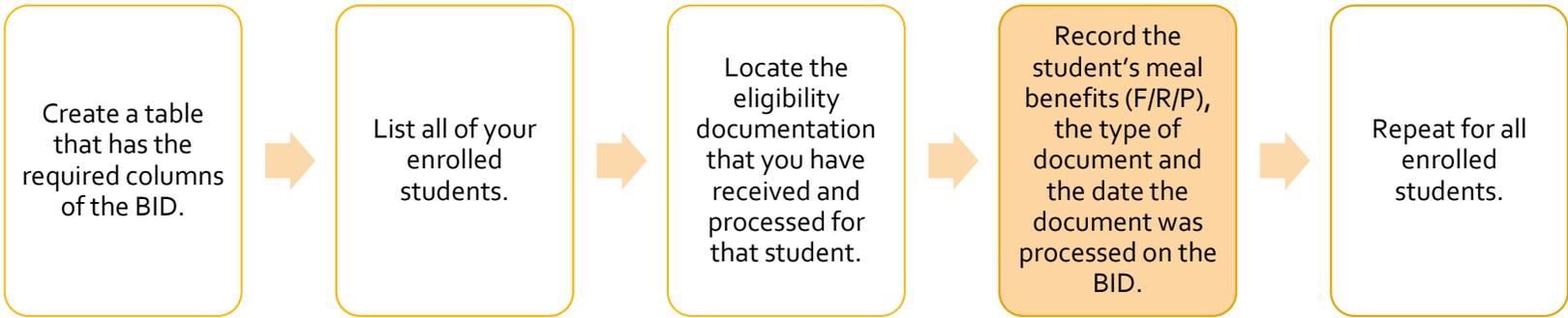
- On file, there is a printed **CNP Direct Certification match result** list that was run on **9/25/16**. William is a not match; however, Ron did match in **SNAP** and **TANF** columns. A match in SNAP or TANF extends to all household members.

Processed as:	<b>Standard</b>		
Prepared by:	<b>Joan Hill</b>	Date Prepared:	<b>9/25/2016 1:46PM</b>
Direct Verification:	<b>No</b>	Displaying:	<b>Matches , Non-Matches</b>
Records Processed:	<b>7</b>	Validation Errors Found:	<b>0</b>
Matches Found:	<b>2</b>	Non-Matches Found:	<b>5</b>
SNAP Matches:	<b>1</b>	MA Matches:	<b>0</b>
TANF Matches:	<b>2</b>	Foster Matches:	<b>0</b>
BIA Matches:	<b>0</b>	Migrant Matches:	<b>0</b>

Record Number ^	First Name	Last Name	Birthdate	DES Results	DES Decision Date	SNAP	TANF	MA	FOSTER
1	Wiley	Coyote	02/15/2001	No Match					
2	Dusty	DeVil	09/08/2001	No Match					
3	Hermione	Granger	10/31/2000	No Match					
4	Brock	Lee	12/01/1999	Match			Y		
5	Harry	Potter	08/09/2001	No Match					
6	Ron	Weasley	04/06/2000	Match		Y	Y		
7	William	Weasley	11/08/1999	No Match					



# Creating the BID



Record the information on the row for **William Weasley**.

- Under *Benefit Status* record **Free**.
- In the column titled *Method/Documentation* we will write **DC-SNAP**. Any time a student does not match, but their household member does in either the SNAP, TANF, or FDPIR column, record what the household member matched in.
- Under *Certification Date*, record the date DC was conducted, **9/25/16**.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock	Free	DC-TANF	7/15/16
Potter	Harry	Free	Foster Application	9/3/16
Weasley	Ron	Free	DC-SNAP	9/25/16
Weasley	William	Free	DC-SNAP	9/25/16



## Comprehension Check

Which of the following is not required on the BID?

- A. Student Name
- B. Benefit Status (Free/Reduced/Paid)
- C. Birthdate
- D. Certification Date



## Comprehension Check

Which of the following is not required on the BID?

- A. Student Name
- B. Benefit Status (Free/Reduced/Paid)
- C. **Birthdate**
- D. Certification Date

Student birthdates are not needed on the BID. It is only required to include information about the benefit status of the child along with the documentation/method of certification and the date the student was certified to receive those benefits.



## *Comprehension Check*

**What should you write on the BID for a household member if they do not match on CNP Direct Certification, but a member of their household is a match in the SNAP column?**

- A. Paid; No Documentation
- B. Free; DC-SNAP
- C. Reduced; DC-SNAP
- D. Unsure; It would depend on additional information from the household.



## *Comprehension Check*

What should you write on the BID for a household member if they do not match on CNP Direct Certification, but a member of their household is a match in the SNAP column?

- A. Paid; No Documentation
- B. Free; DC-SNAP**
- C. Reduced; DC-SNAP
- D. Unsure; It would depend on additional information from the household.

Anytime a student matches in SNAP, TANF, and/or FDPIR that student and all other students in that household are directly certified.



Below is a household application. What date should be listed on the BID as the certification date?

# Comprehension Check

**2016-2017 Application for Free and Reduced Price School Meals**  
Complete one application per household. Please use a pen (not a pencil).

**STEP 1** List ALL infants, children, and students up to and including grade 12 in your household (if more spaces are required for additional names, attach another sheet of paper)

Child's First Name	MI	Child's Last Name	School Name	Household Member?
SOZY		SMITH		<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

**STEP 2** Do any Household Members (including you) currently participate in one or more of the following assistance programs: SNAP, TANF, or FDIPIR? Circle one: Yes / No  
If you answered NO - Complete STEP 3. If you answered YES - Write a case number here then go to STEP 4 (Do not complete STEP 3) Case Number: 198769

**STEP 3** Report Income for ALL Household Members (Skip this step if you answered "Yes" to STEP 2)

**A. Child Income**  
Sometimes children in the household earn income. Please include the TOTAL GROSS income earned by all Children Household Members listed in STEP 1 here.

Child GROSS income	Household Member?
\$	<input type="checkbox"/>

**B. All Adult Household Members (including yourself)**  
List only the Adult Household Members (including yourself) even if they do not receive income. For each Household Member listed, if they do receive income, report total GROSS income (amount before taxes and deductions) for each source in whole dollars only. If they do not receive income from any source, write 0. If you enter 0 or leave any fields blank, you are certifying (promising) that there is no income to report.

Name of Adult Household Members (First and Last)	GROSS Earnings from Work	Public Assistance/Child Support/Alimony	Pensions/Retirement/All Other Income
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

**C. Total Household Members** (Children and Adults)  Last Four Digits of Social Security Number (SSN) of Primary Wage Earner or Other Adult Household Member: X X X X X X X X Check if no SSN

**STEP 4** Contact information and adult signature

I certify (promise) that all information on this application is true and that all income is reported. I understand that this information is given in connection with the receipt of Federal funds, and that school officials may verify (check) the information. I am aware that if I purposely give false information, my children may lose meal benefits, and I may be prosecuted under applicable State and Federal laws.

Signature of adult completing the form: Gina Smith Date: 07/29/16

Printed name of adult completing the form: \_\_\_\_\_ Daytime Phone and Email (optional): \_\_\_\_\_

Street Address (if available): \_\_\_\_\_ Apt# \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**OFFICE USE ONLY**

Eligibility: Free \_\_\_ Reduced \_\_\_ Denied \_\_\_  Directly Certified  E-mail/Phone

Determining Official's Signature: Diane Jones Date: 8/5/16

Case # Application  Foster Application

Income Application

Total Income: \_\_\_\_\_ Per:  Week  Bi-Weekly (Every 2 Weeks)  2x Month  Monthly  Annual

Selected For Verification

Confirming Official's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Follow-Up Official's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

- A. 7/29/16 - The date the household member signed it.
- B. 8/3/16- The date it was received by the School Nutrition Office.
- C. 8/5/16- The date it was certified by Diane Jones in the School Nutrition Office.



Below is a household application. What date should be listed on the BID as the certification date?

# Comprehension Check

**2016-2017 Application for Free and Reduced Price School Meals**  
Complete one application per household. Please use a pen (not a pencil).

**STEP 1** List ALL infants, children, and students up to and including grade 12 in your household (if more spaces are required for additional names, attach another sheet of paper)

Child's First Name	MI	Child's Last Name	School Name	Grades
SOZY		SMITH		<input type="checkbox"/> Pre-K <input type="checkbox"/> K-12 <input type="checkbox"/> 12th <input type="checkbox"/> Other

**STEP 2** Do any Household Members (including you) currently participate in one or more of the following assistance programs: SNAP, TANF, or FDIPIR? Circle one: Yes / No  
If you answered NO - Complete STEP 3. If you answered YES - Write a case number here then go to STEP 4 (Do not complete STEP 3) Case Number: 128769

**STEP 3** Report Income for ALL Household Members (Skip this step if you answered "Yes" to STEP 2)

**A. Child Income**  
Sometimes children in the household earn income. Please include the TOTAL GROSS income earned by all Children Household Members listed in STEP 1 here.

**B. All Adult Household Members (including yourself)**  
List only the Adult Household Members (including yourself) even if they do not receive income. For each Household Member listed, if they do receive income, report total GROSS income (amount before taxes and deductions) for each source in whole dollars only. If they do not receive income from any source, write "0". If you enter "0" or leave any fields blank, you are certifying (promising) that there is no income to report.

Name of Adult Household Members (First and Last)	GROSS Earnings from Work	Public Assistance/Child Support/Alimony	Pensions/Retirement/All Other Income

**C. Total Household Members** (Children and Adults)  Last Four Digits of Social Security Number (SSN) of Primary Wage Earner or Other Adult Household Member: X X X X X X X X Check if no SSN

**STEP 4** Contact information and adult signature

I certify (promise) that all information on this application is true and that all income is reported. I understand that this information is given in connection with the receipt of Federal funds, and that school officials may verify (check) the information. I am aware that if I purposely give false information, my children may lose meal benefits, and I may be prosecuted under applicable State and Federal laws.

Signature of adult completing the form: Gina Smith Date: 07/29/16

Printed name of adult completing the form: \_\_\_\_\_ Daytime Phone and Email (optional): \_\_\_\_\_  
Street Address (if available): \_\_\_\_\_ Apt# \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**OFFICE USE ONLY**

Eligibility: Free  Reduced  Denied  Diane Jones Date: 8/5/16

Determining Official Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Case # Application: \_\_\_\_\_ Date: \_\_\_\_\_  
Income Application: \_\_\_\_\_  
Household Size: \_\_\_\_\_ Per:  Week \_\_\_\_\_  Annual \_\_\_\_\_

Total Income: \_\_\_\_\_

Selected For Verification  
Confirming Official's Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Follow-Up Official's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

- A. 7/29/16 – The date the household member signed it.
- B. 8/3/16- The date it was received by the School Nutrition Office.
- C. 8/5/16- The date it was certified by Diane Jones in the School Nutrition Office.



## Comprehension Check

**True or False: Does the BID below contain all the required information for a BID?**

Last Name	First Name	School Name	Benefit Status	Certification Date
Flintstone	Fred	Dry Desert High School	Free	8/7/16

- A. True, it has all the information needed.
- B. False, it is missing grade level.
- C. False, it is missing method/documentation.



## Comprehension Check

**True or False: Does the BID below contain all the required information for a BID?**

Last Name	First Name	School Name	Benefit Status	Certification Date
Flintstone	Fred	Dry Desert High School	Free	8/7/16

- A. True, it has all the information needed.
- B. False, it is missing grade level.
- C. **False, it is missing method/documentation.**

**The BID must include the method/documentation used to certify the student for meal benefits.**



# Updating the Benefit Issuance Document (BID)

## *Updating the BID*

### **When to Update the BID**

The BID is considered an active document, therefore it is important to update it anytime there is a change in eligibility information. This means it should be updated when:

- new students enroll or withdraw;
- 30 Day Carryover;
- if a household turns in an application that changes student eligibility status; and
- anytime you get new matches in CNP Direct Certification.
  - If a student who has meal benefits due to a household application now matches in CNP Direct Certification; you will update the BID as DC-and the category they matched in with the date that CNP Direct Certification was conducted.
  - If a student who is already directly certified now matches in SNAP; you will update the BID as DC-SNAP with the date that CNP Direct Certification was conducted.

# Updating the BID

## Updating the Student's Eligibility Status

Even if a student already has meal benefits listed on the BID, you will want to update the existing benefits if their change has *increased their meal benefits* or if the new category can *extend benefits to household members*.

It is recommended to reference this diagram when determining if it is necessary to update a meal benefit status or method/documentation on the BID.



- For example, if a child was reduced based on an income application and now submits a case number application, you will change the meal benefits to free, and the method/documentation to case number application. The certification date will also be updated to the date the case number application was processed.

## Updating the BID

*If the child is already certified for free meal benefits as Foster in CNP Direct Certification, do I have to change their eligibility on the BID if they later match under SNAP in CNP Direct Certification?*

- Yes. When children match under SNAP in CNP Direct Certification it is important to update this on your BID even though the student's free meal benefits do not change. When a child matches in Foster, their free meal benefits do not extend to other household members. When a child matches in SNAP, TANF and/or FDPIR, the free meal benefits extend to household members. Using the diagram below, DC-SNAP takes precedence over DC-Foster.



# Updating the BID

## How do I make a change to the BID?

As best practice, you will want to find the name of the student and delete the existing benefit status, method/documentation and certification date. Then enter in the new benefit status, method/documentation and certification date based on the documentation you have recently processed.

For example, Wiley Coyote was certified as free due to an application that was processed on 8/7/16. On 10/1/16, CNP Direct Certification was run and Wiley matched in SNAP. The BID should be updated due to matching in SNAP and the date the CNP Direct Certification was conducted.

*On your Sample BID, practice making this change.*

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/12/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock	Free	DC-TANF	7/15/16
Potter	Harry	Free	Foster Application	9/13/16
Wesley	Ron	Free	DC-SNAP	9/15/16
Wesley	William	Free	DC-SNAP	9/15/16



## Updating the BID

### Does your Sample BID look like this?

On the updated BID, Wiley Coyote's benefit status stays free. The method/documentation is updated to DC SNAP, and the certification date is updated to 10/1/16, which was when CNP Direct Certification was run and Wiley matched in SNAP.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Coyote	Wiley	Free	Income Application	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock	Free	DC-TANF	7/15/16
Potter	Harry	Free	Foster Application	9/3/16
Weasley	Ron	Free	DC-SNAP	9/25/16
Weasley	William	Free	DC-SNAP	9/25/16



SAMPLE BID				
Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Coyote	Wiley	Free	DC-SNAP	10/1/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock	Free	DC-TANF	7/15/16
Potter	Harry	Free	Foster Application	9/3/16
Weasley	Ron	Free	DC-SNAP	9/25/16
Weasley	William	Free	DC-SNAP	9/25/16

## Updating the BID

### Beginning of the School Year- New Student

It's important to remember that you cannot give a student meal benefits unless you have documentation on file.

*For example, Dusty DeVil was a new student that was present for the first day of school on 8/7/16; but did not submit his application until 9/15/16 which was processed for reduced meal benefits on 9/17/16. Below shows the BID during 8/7/16-9/16/16 that Dusty was paid and would have been paying full price for meals. Once the application was processed on 9/17/16, the BID is updated. Now Dusty is charged at the reduced rate.*

#### BID as of 8/7/16-9/16/16

Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Dusty	DeVil	Paid	No Documentation	

#### BID as of 9/17/16

Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Dusty	DeVil	Reduced	Income Application	9/17/16

## Updating the BID

### Beginning of the School Year- 30 Day Carryover

Children are eligible for school meal benefits for the school year and for up to 30 operating days in the following school year. The LEA will carryover meal benefits beginning on the first operating day of school, or until a new eligibility determination is made.

*For example,* last year Scooby Doo received free meal benefits due to an income application processed on 9/1/15. He did not submit a new application and was not a match in CNP Direct Certification. On the 30<sup>th</sup> operating day, 9/25/16; his eligibility status has changed to paid on the BID. You do not need to indicate the date he changed to paid on the BID.

#### BID as of 8/4/16 (First operating day)

Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Doo	Scooby	Free	Income Application	9/1/15

#### BID as of 9/25/16 (30<sup>th</sup> operating day)

Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Doo	Scooby	Paid	No Documentation	

## Updating the BID

### Withdrawn Students

A student's eligibility lasts all school year (July 1-June 30). If the student returns within the same school year, their previously determined eligibility status will continue to be used. You can keep the student on the BID, but be sure to indicate that the child has withdrawn. See an example below of how to track this.

*In this example, the LEA has created another column to the right to be able to add notes. The date the student withdrew is noted.*

Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date	Notes
Coyote	Wiley	Free	Income Application	8/7/16	Withdrawn 10/5/16

# Coding the Benefit Issuance Document (BID)

## *Coding the BID*

### **Protecting Student Eligibility**

LEAs must ensure that a student's eligibility status is protected and is not disclosed at any point in the process of providing free or reduced-price meals.

- An example where student's information is protected would be an electronic point of service where students enter a pin code or scan their IDs. As long as students cannot see other students' eligibility statuses, no coding would be needed.
- An example where student's information isn't protected could be a roster where student names are listed with their eligibility status. Students may be able to see this information when they walk by or are standing in line. Therefore the BID would need to be coded.

*The following slides will provide an example of coding the BID. Note: this is one way of coding, you may use any numbers and/or letters for your coding process.*

# Coding the BID

## Example of Coding the BID

- In order to protect the student's information on the BID the words Free, Reduced and Paid are coded in a way that only the school nutrition staff can understand. In order to do this, the school has created a Category Code Key.
- For example, instead of using Free and DC SNAP, we can use the code from the table "Four random numbers + 01= Free-DC SNAP", such as 123401.

Category Code Key
Four random numbers + 01= Free- DC SNAP
Four random numbers + 02= Free - DC TANF
Four random numbers + 03= Free - DC Foster
Four random numbers + 04= Free by Income App
Four random numbers + 05= Free by Case # App
Four random numbers + 06= Free by Foster App
Four random numbers + 07= Free by H/M/R
Four random numbers + 08= Reduced by Income
Four random numbers + 09= Paid/Denied

Last Name	First Name	Benefit Status	Method/ Documentation	Certification date
Weasley	William	Free	DC -SNAP	9/25/16

↓

Last Name	First Name	Eligibility	Certification date
Weasley	William	123401	9/25/16

*William, and all other students that are free due to matching in SNAP will have listed four different random numbers + 01 in the column titled Eligibility.*

## Coding the BID

### Practice Coding your Sample BID

On the back side of your handout, *Sample BID*, is a table titled *Coded BID*. Complete the missing eligibility codes for Dusty DeVil and William Weasley, which are highlighted in red. When completed click on the next slide for the correct answer.

CODED BID			
Last Name	First Name	Eligibility	Certification Date
Coyote	Wiley	123401	10/1/16
DeVil	Dusty		9/17/16
Granger	Hermione	989809	
Lee	Brock	321302	7/15/16
Potter	Harry	839206	9/3/16
Weasley	Ron	232301	9/25/16
Weasley	William		9/25/16

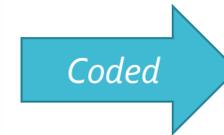
Answer

# Coding the BID

## Does your Coded BID look like this?

On the *Coded BID*, Dusty DeVil's coded eligibility status is four random digits + 08. William Weasley's coded eligibility status should be four random digits + 01. These are entered into the *Coded BID* as shown below, highlighted in purple.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Coyote	Wiley	Free	DC-SNAP	8/7/16
DeVil	Dusty	Reduced	Income Application	9/17/16
Granger	Hermione	Paid	No Documentation	
Lee	Brock	Free	DC-TANF	7/15/16
Potter	Harry	Free	Foster Application	9/3/16
Weasley	Ron	Free	DC-SNAP	9/25/16
Weasley	William	Free	DC-SNAP	9/25/16



CODED BID			
Last Name	First Name	Eligibility	Certification Date
Coyote	Wiley	123401	10/1/16
DeVil	Dusty	323208	9/17/16
Granger	Hermione	989809	
Lee	Brock	321302	7/15/16
Potter	Harry	839206	9/3/16
Weasley	Ron	232301	9/25/16
Weasley	William	323201	9/25/16

## *Comprehension Check*

**True or False: Every BID must be coded.**

- A. True
- B. False



## Comprehension Check

**True or False: Every BID must be coded.**

- A. True
- B. False**

**A BID only needs to be coded if the eligibility status of students is visible at the point of service. If only the school nutrition staff have access to and see the BID, no coding is needed. If students can see the BID, it needs to be coded. It's up to the LEA to decide if the BID should be coded based on how their operation is set up.**



# Questions and Answers

## Questions & Answers

*I have an electronic system that creates a BID for me. Do I need to create another one?*

- No. However, you do need to ensure the BID created by your system includes the required information for all students who receive benefits and that your system accurately reflects when changes in eligibility status occur.
- You also want to ensure you understand how the eligibility status of each student is transferred and categorized in your electronic system.

## Questions & Answers

*I have an electronic system that only lets me enter Free, Reduced, or Paid, and I can't list the method of certification in detail. What should I do?*

- You are strongly encouraged to contact the vendor and ask about adding more detail to your system codes and reports. You are still required to know and track how each student is eligible for benefits, even if your system doesn't track that.

## Questions & Answers

*Does ADE have a specific template I can download and fill in to make my BID?*

- No. ADE does not have a specific template; but you could use the sample BID in this training. Remember, the BID should be customized to meet your needs and should be in a format you are comfortable working with.

## Questions & Answers

*If the child is already certified for free meal benefits due to an application, do I have to change their eligibility on the BID if they match on CNP Direct Certification?*

- Yes. When children match in CNP Direct Certification it is important to update this on your BID. Later in the year, ADE will ask for the number of students that match in CNP Direct Certification.

## Questions & Answers

*If a child matches in CNP Direct Certification, can I just write DC instead of writing DC and the column the child matched in?*

- It is important to write the type of category the child matched in for several reasons. First, if you do not record which category the child matched in, you will not know if you are able to extend free meal benefits to other household members. Additionally, ADE will ask specifically for the number of students (and extended household members) that matched in SNAP on the CNP Verification Summary Report due in February. If you only indicated DC, you would not be able to count the number of students who matched in SNAP from your BID.

# Technical Assistance

If you have any questions about certifying students for meal benefits, use:

- The Eligibility Manual for School Meals and the various other How To Guides found at:  
[http://www.azed.gov/health\\_nutrition/nslp/programguidance/](http://www.azed.gov/health_nutrition/nslp/programguidance/)

***For other questions about the BID,  
please contact your School Nutrition Program Specialist.***

# End of Training

## Congratulations!

You have completed the ***Step by Step Instruction: How to Create a Benefit Issuance Document***. To request a Certificate, please go to the next slide.

In order to count this training towards your Professional Standards training hours, the training content must align with your job duties.

- Information to include when documenting this training for Professional Standards:
  - Training Title: ***Step by Step Instruction: How to Create a Benefit Issuance Document***
  - Learning Codes: 3110, 3120
  - Key Area: 3000-Administration
  - Length: 1 hour
- *Please note, attendees must document the amount of training hours indicated on the training despite the amount of time it takes to complete it.*

Request a  
Certificate

## End of Training

# Requesting a Training Certificate

Please click on the link below to complete a brief survey about this training. Once the survey is complete, ADE will create a certificate of completion and email it to you within 10 business days.

<https://www.surveymonkey.com/r/OnlineHowToGuides>

The information below is for your reference when completing the survey.

Training Title: ***Step by Step Instruction: How to Create a Benefit Issuance Document***

Professional Standards Learning Code: ***3110, 3120***

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