

# How to Create a Benefit Issuance Document

## STEP-BY-STEP INSTRUCTION

Revised July 2022

Professional Standards Learning Code: 3110, 3120





## Arizona Department of Education (ADE)

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This training was developed by the Arizona Department of Education (ADE) Health and Nutrition Services Division (HNS).

### Intended Audience

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This training is intended for **School Food Authorities (SFAs) operating the National School Lunch Program (NSLP)**. All regulations are specific to operating the NSLP under the direction of ADE.

### Professional Standards

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Information to include when documenting this training for Professional Standards:

**Training Title:** How to Create a Benefit Issuance Document

**Key Area:** 3000 – Administration

**Learning Codes:** 3110, 3120

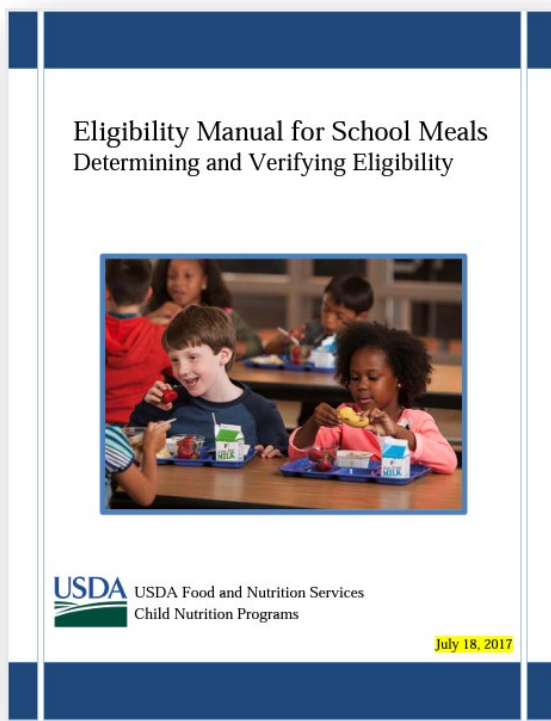
**Length:** 1 hour

# Objectives

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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.



The instruction within this How-To Guide is based on guidance from **USDA's Eligibility Manual for School Meals, Revised July 2017.**

***It is recommended to review this resource in addition to reviewing this training. Click [here](#) to access USDA's Eligibility Manual for School Meals, Revised July 2017.***

# Definitions

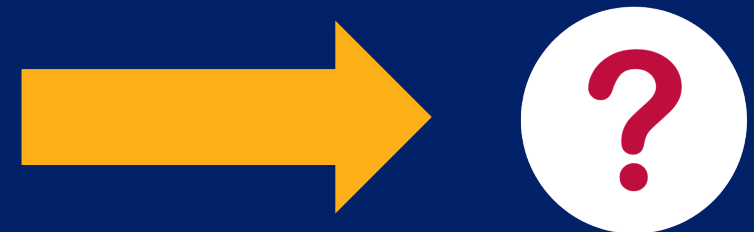
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**BID:** The document that summarizes the meal benefit each student receives, the type of documentation that is on file supporting that benefit eligibility, and the date the documentation was processed.

**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 SFA has on file that support why each student is receiving free, reduced-price, or paid meals.

- 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 answers available within the guide.
- This icon will indicate a comprehension quiz question, and the background of the slides will be blue like you see on this slide.



# How to Create a Benefit Issuance Document

## This Step-by-Step Instruction will include:

Introduction to the Benefit Issuance Document	Slides 9 – 15
Creating the Benefit Issuance Document	Slides 16 – 49
Updating the Benefit Issuance Document	Slides 50 – 58
Coding the Benefit Issuance Document	Slides 59 – 65
Questions & 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.***

# How to Create a Benefit Issuance Document

## Handouts for Training

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

The image shows a 'SAMPLE BID' form. It has a header with the title 'SAMPLE BID' and a small logo. Below the header is a table with five columns: 'Last Name', 'First Name', 'Benefit Status', 'Method Documentation', and 'Certification Date'. The table has seven rows. A red box highlights the first row of the table. At the bottom of the form, there is a footer with the text: 'August 2021 | Health and Nutrition Services | Arizona Department of Education | This institution is an equal opportunity provider.'

[Sample BID](#)

ENROLLMENT EXAMPLE		
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

[Enrollment](#)



# **Introduction to the Benefit Issuance Document**



# Introduction to the Benefit Issuance Document

## Eligibility Determinations and Documentation

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

Based on specific eligibility documentation, each student will be certified for free, reduced-price, or paid meal benefits that will be recorded on the BID. See the chart below that identifies the various eligibility documentation.

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

# Introduction to the Benefit Issuance Document

## Benefit Issuance Document

All eligibility determinations should be recorded on a BID.

It is recommended to include all enrolled students (free, reduced-price and paid) for an inclusive list of all enrolled students' eligibility statuses.

At minimum, a BID is a list of all students at your organization that you determined to be eligible for either free or reduced-price meal benefits.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/20
DeVil	Dusty	Reduced	Income App	9/17/20
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/20
Potter	Harry	Free	Foster App	9/3/20
Weasley	Ron	Free	DC SNAP	7/17/20
Weasley	William	Free	DC SNAP	7/17/20

# Introduction to the Benefit Issuance Document

## Benefit Issuance Document Required Information

The BID contains the:

- first and last name of the student,
- meal benefit status,
- method used to determine benefits (application, direct certification, etc.),
- and date eligibility 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 SFA has more than one site operating, a column should be added for site name.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/20
DeVil	Dusty	Reduced	Income App	9/17/20
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/20
Potter	Harry	Free	Foster App	9/3/20
Weasley	Ron	Free	DC SNAP	7/17/20
Weasley	William	Free	DC SNAP	7/17/20

# Introduction to the Benefit Issuance Document

## How to Read a Benefit Issuance Document

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

For example,

- Dusty DeVil has reduced-price meal benefits due to an income application.
- The application was certified on 9/17/20.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/20
DeVil	Dusty	Reduced	Income App	9/17/20
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/20
Potter	Harry	Free	Foster App	9/3/20
Weasley	Ron	Free	DC SNAP	7/17/20
Weasley	William	Free	DC SNAP	7/17/20

# Introduction to the Benefit Issuance Document

## How to Read a Benefit Issuance Document

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.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/20
DeVil	Dusty	Reduced	Income App	9/17/20
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/20
Potter	Harry	Free	Foster App	9/3/20
Weasley	Ron	Free	DC SNAP	7/17/20
Weasley	William	Free	DC SNAP	7/17/20

# Introduction to the Benefit Issuance Document

## How to Read a Benefit Issuance Document

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 8/15/20.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/20
DeVil	Dusty	Reduced	Income App	9/17/20
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/20
Potter	Harry	Free	Foster App	9/3/20
Weasley	Ron	Free	DC SNAP	7/17/20
Weasley	William	Free	DC SNAP	7/17/20

# **Creating the Benefit Issuance Document**





# Creating the Benefit Issuance Document

## Example Handouts

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 **Enrollment List**.

SAMPLE BID				

[Sample BID](#)

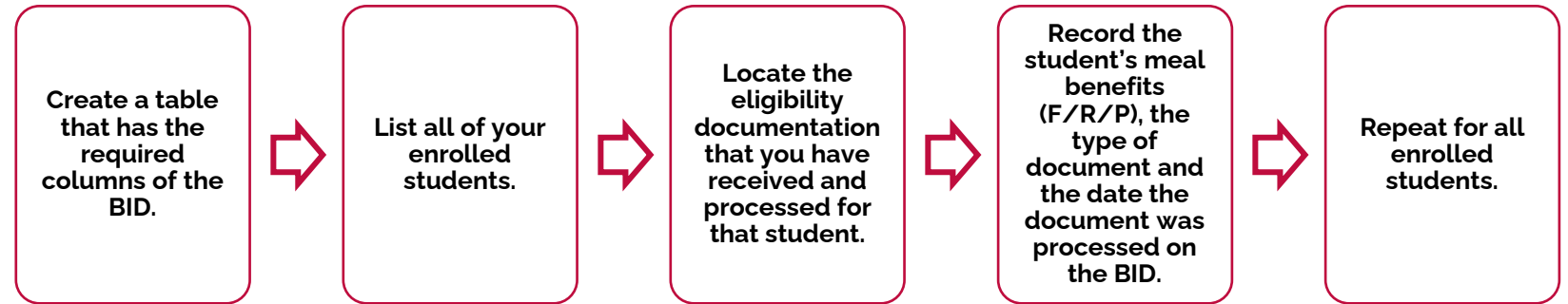
ENROLLMENT EXAMPLE		
First Name	Last Name	School Name
Wiley	Coyote	Dry Desert High
Dusty	DeVil	Dry Desert High
Hermione	Granger	Dry Desert High
Brock	Lee	Dry Desert High
Harry	Potter	Dry Desert High
Ron	Weasley	Dry Desert High
William	Weasley	Dry Desert High

[Enrollment](#)

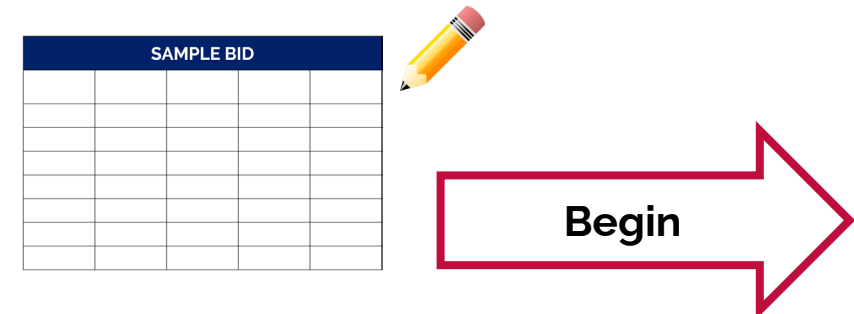


# Creating the Benefit Issuance Document

## Building the Benefit Issuance Document



- 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**.
- Please refer back to the previous slides at any point throughout this training.



# Creating the Benefit Issuance Document



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 Benefit Issuance Document



Using the **Enrollment List**, list all of the students' 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 Benefit Issuance Document



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 screenshot 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 Benefit Issuance Document



The first student on the BID is Wiley Coyote.

- On file, there is a household application that has been processed based on income that certified Wiley Coyote as free on 8/7/20.

OFFICE USE ONLY	
Eligibility: Free <input checked="" type="checkbox"/> Reduced <input type="checkbox"/> Denied <input type="checkbox"/>	<input type="checkbox"/> Directly Certified <input type="checkbox"/> Error-Prone
Determining Official's Signature: <u>Joan Hill</u>	Date: <u>8/7/20</u>
<input type="checkbox"/> Case # Application <input type="checkbox"/> Foster Application	
<input checked="" type="checkbox"/> Income Application	
Household Size: <u>4</u>	
Total Income: <u>\$2,000</u>	Per: <input type="checkbox"/> Week <input type="checkbox"/> Bi-Weekly (Every 2 Weeks) <input type="checkbox"/> 2x Month <input checked="" type="checkbox"/> Monthly <input type="checkbox"/> Annual
<input type="checkbox"/> Selected For Verification	
Confirming Official's Signature: _____	Date: _____
Follow-Up Official's Signature: _____	Date: _____

# Creating the Benefit Issuance Document



Record the information in 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 (8/7/20).

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	free	Income Application	8/7/20
DeVil	Dusty			
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

# Creating the Benefit Issuance Document



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

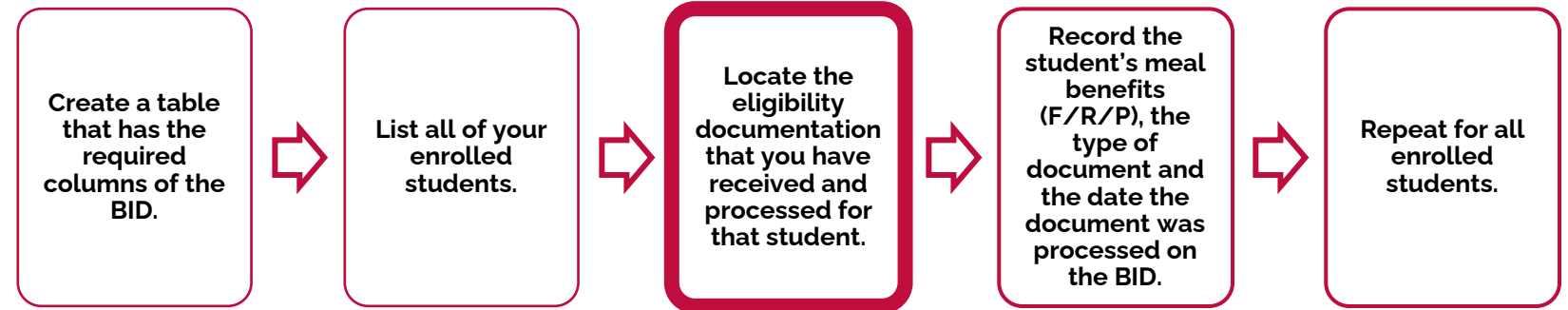
Now, we will enter information for Dusty DeVil.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Coyote	Wiley	free	Income Application	8/7/20
DeVil	Dusty			
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			





# Creating the Benefit Issuance Document



Dusty DeVil

- On file there is a household application that has been processed based on income that certified Dusty DeVil as reduced-price on 9/17/20.

OFFICE USE ONLY	
Eligibility: Free <input type="checkbox"/> Reduced <input checked="" type="checkbox"/> Denied <input type="checkbox"/>	<input type="checkbox"/> Directly Certified <input type="checkbox"/> Error-Prone
Determining Official's Signature: <u>Joan Hill</u>	Date: <u>9/17/20</u>
<input type="checkbox"/> Case # Application <input type="checkbox"/> Foster Application	
<input checked="" type="checkbox"/> Income Application	
Household Size: <u>3</u>	
Total Income: <u>\$600</u>	Per: <input checked="" type="checkbox"/> Week <input type="checkbox"/> Bi-Weekly (Every 2 Weeks) <input type="checkbox"/> 2x Month <input type="checkbox"/> Monthly <input type="checkbox"/> Annual
<input type="checkbox"/> Selected For Verification	
Confirming Official's Signature: _____	Date: _____
Follow-Up Official's Signature: _____	Date: _____

# Creating the Benefit Issuance Document



Record the information in 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 (9/17/20).

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	free	Income Application	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

# Creating the Benefit Issuance Document



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	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			



# Creating the Benefit Issuance Document



Hermione Granger

- She and her household members did not match 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 Benefit Issuance Document



Record the information in the row for Hermione Granger.

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

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	free	Income Application	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione	paid	No Documentation	
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

# Creating the Benefit Issuance Document



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	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione	paid	No Documentation	
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			



# Creating the Benefit Issuance Document

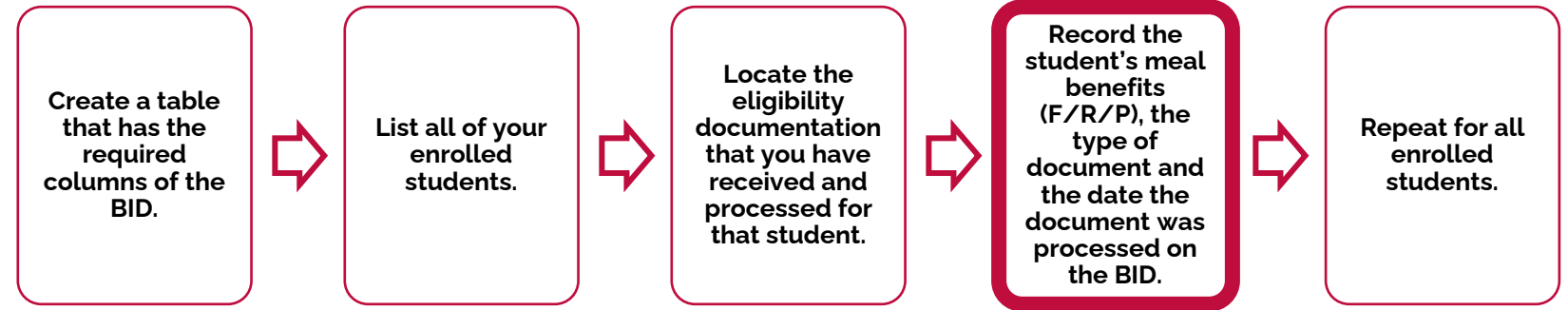


Brock Lee

- On file, there is a printed CNP Direct Certification match result that was run on 7/15/20. He was a match in TANF.

Show 10 entries		Result: All		Search:			
First Name	Last Name	Birth Date	Result	Result Date	Decision Date	Eligibility Type	Possible Duplicate
Brock	Lee	02/02/2008	Match	07/15/2020	11/15/2019	TANF	
Showing 1 to 1 of 1 entries							Previous 1 Next

# Creating the Benefit Issuance Document



Record the information on the row for Brock Lee.

- Under ***Benefit Status***, record free.
- Under ***Method/Documentation***, we will write DC TANF. DC is short for Direct Certification and TANF is the Eligibility Type Brock matched in.
- Under ***Certification Date***, record the date DC was conducted (7/15/20).

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	free	Income Application	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione	paid	No Documentation	
Lee	Brock	free	DC TANF	7/15/20
Potter	Harry			
Weasley	Ron			
Weasley	William			



# Creating the Benefit Issuance Document



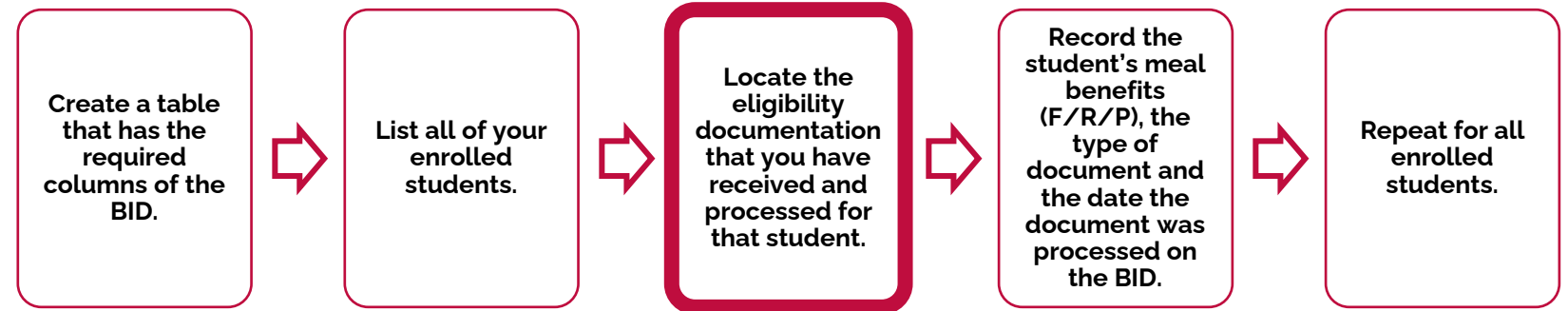
All of the required information for Brock Lee has been entered into the BID.

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	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione	paid	No Documentation	
Lee	Brock	free	DC TANF	7/15/20
Potter	Harry			
Weasley	Ron			
Weasley	William			



# Creating the Benefit Issuance Document



Harry Potter

- On file, there is a household application that has been processed as free on 9/3/20 with the box Foster checked off.

OFFICE USE ONLY	
Eligibility: Free <input checked="" type="checkbox"/> Reduced <input type="checkbox"/> Denied <input type="checkbox"/>	<input type="checkbox"/> Directly Certified <input type="checkbox"/> Error-Prone
Determining Official's Signature: <u>Joan Hill</u>	Date: <u>9/3/20</u>
<input type="checkbox"/> Case # Application <input checked="" type="checkbox"/> Foster Application	
<input type="checkbox"/> Income Application	
Household Size: _____	
Total Income: _____ Per: <input type="checkbox"/> Week <input type="checkbox"/> Bi-Weekly (Every 2 Weeks) <input type="checkbox"/> 2x Month <input type="checkbox"/> Monthly <input type="checkbox"/> Annual	
<input type="checkbox"/> Selected For Verification	
Confirming Official's Signature: _____	Date: _____
Follow-Up Official's Signature: _____	Date: _____

# Creating the Benefit Issuance Document



Record the information in 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 (9/3/20).

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	free	Income Application	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione	paid	No Documentation	
Lee	Brock	free	DC TANF	7/15/20
Potter	Harry	free	Foster Application	9/3/20
Weasley	Ron			
Weasley	William			

# Creating the Benefit Issuance Document



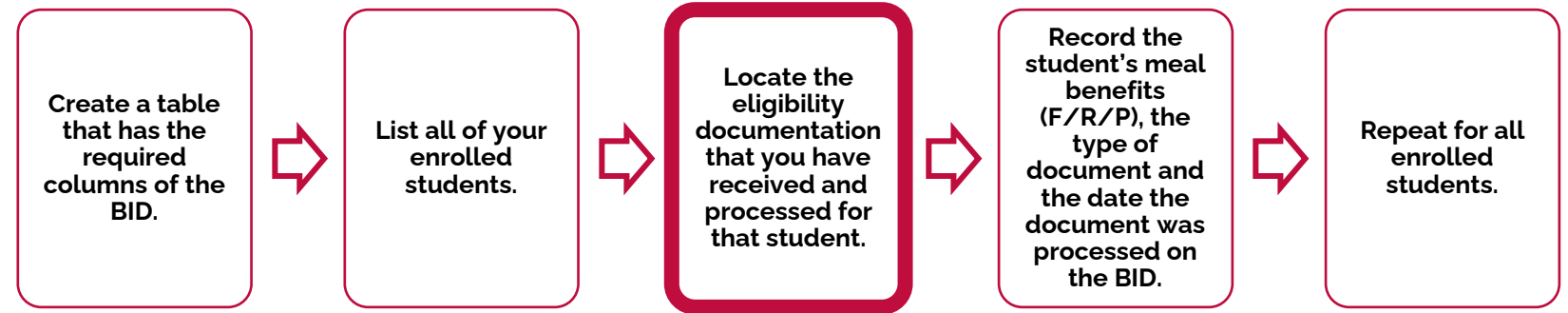
All of the required information for Harry Potter has been entered into the BID.

Now, we will enter information for Ron Weasley.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Coyote	Wiley	free	Income Application	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione	paid	No Documentation	
Lee	Brock	free	DC TANF	7/15/20
Potter	Harry	free	Foster Application	9/3/20
Weasley	Ron			
Weasley	William			



# Creating the Benefit Issuance Document



Ron Weasley

- On file, there is a printed CNP Direct Certification match result that was run on 9/25/20. He was a match in SNAP and TANF.

Show 10 entries		Result: All		Search: <input type="text"/>			
First Name	Last Name	Birth Date	Result	Result Date	Decision Date	Eligibility Type	Possible Duplicate
Ron	Weasley	06/22/2005	Match	09/25/2020	12/04/2019	SNAP, TANF	
Showing 1 to 1 of 1 entries							
						Previous	1 Next

# Creating the Benefit Issuance Document



Record the information in the row for Ron Weasley.

- Under ***Benefit Status***, record free.
- Under ***Method/Documentation***, we will write DC SNAP. Any time a student matches in SNAP and another category, (such as TANF), always record SNAP on your BID.
- Under ***Certification Date***, record the date DC was conducted (9/25/20).

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	free	Income Application	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione	paid	No Documentation	
Lee	Brock	free	DC TANF	7/15/20
Potter	Harry	free	Foster Application	9/3/20
Weasley	Ron	free	DC SNAP	9/25/20
Weasley	William			

# Creating the Benefit Issuance Document



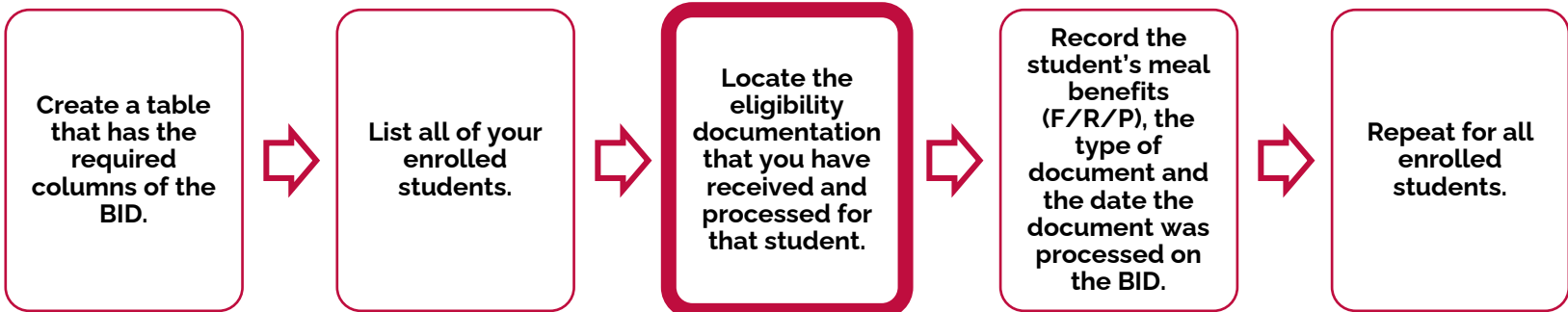
All of the required information for Ron Weasley has been entered into the BID.

Now, we will enter information for William Weasley.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Coyote	Wiley	free	Income Application	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione	paid	No Documentation	
Lee	Brock	free	DC TANF	7/15/20
Potter	Harry	free	Foster Application	9/3/20
Weasley	Ron	free	DC SNAP	9/25/20
Weasley	William			



# Creating the Benefit Issuance Document



William Weasley

- On file, there is a printed CNP Direct Certification match result that was run on 9/25/20. William is a No Match; however, Ron Weasley resides in the same household as William and is matched in SNAP and TANF. SNAP or TANF matches extend benefits to all household members; therefore, William is also free.

Show 10 entries		Result: All		Search:			
First Name	Last Name	Birth Date	Result	Result Date	Decision Date	Eligibility Type	Possible Duplicate
William	Weasley	06/22/2005	No Match	09/25/2020			
Showing 1 to 1 of 1 entries							
				Previous	1	Next	



# Creating the Benefit Issuance Document



Record the information on the row for William Weasley.

- Under **Benefit Status** record free.
- Under **Method/Documentation**, we will write DC SNAP-Extended. Any time a student does not match, but their household member matches in either SNAP, TANF, or FDPIR, record what household member matched in. For ease of review, it is best practice to note all students who are extended due to a household match
- Under **Certification Date**, record the date DC was conducted (9/25/20).

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	free	Income Application	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione	paid	No Documentation	
Lee	Brock	free	DC TANF	7/15/20
Potter	Harry	free	Foster Application	9/3/20
Weasley	Ron	free	DC SNAP	9/25/20
Weasley	William	free	DC SNAP-Extended	9/25/20

Which of the following is not required on the BID?

- A) Student Name
- B) Benefit Status (free/reduced-price/paid)
- C) Birthdate
- D) Certification Date



Which of the following is not required on the BID?

- A) Student Name
- B) Benefit Status (free/reduced-price/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.**

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

- A) Paid, no documentation
- B) Free, DC SNAP-Extended
- C) Reduced-price, DC SNAP-Extended
- D) Unsure, It would depend on additional information from the household



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

- A) Paid, no documentation
- B) Free, DC SNAP-Extended**
- C) Reduced-price, DC SNAP-Extended
- D) Unsure, It would depend on additional information from the household

**Any time 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?

**2020-2021 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)

Definition of Household Member: "Anyone who is living with you and shares income and expenses, even if not related." Children in Foster care and children who meet the definition of Homeless, Migrant or Runaway are eligible for free meals.

Child's First Name: S u z y MI: Child's Last Name: S m i t h School Name: **RECEIVED 8/3/20**

**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.

Child GROSS income: \$ How often? Weekly Bi-Weekly 2x Month Monthly

**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 How often? Public Assistance/Child Support/Alimony How often? Pensions/Retirement/All Other Income How often?

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

**STEP 4** Contact information and adult signature Mail Completed Form to: INSERT SCHOOL/DISTRICT MAILING ADDRESS

"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** Today's date: **07/29/20**

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 ☐ Error Prone

Determining Official's Signature: **Diane Jones** Date: **8/5/20**

☐ Case # Application ☐ Foster Application ☐ Directly Certified: Date of Disregard:

☐ Income Application Household Size: 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) 7/29/20, the date the household member signed it.
- B) 8/3/20, the date it was received by the school.
- C) 8/5/20, the date it was certified by Diane Jones at the school.



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

**2020-2021 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)

Definition of Household Member: "Anyone who is living with you and shares income and expenses, even if not related." Children in Foster care and children who meet the definition of Homeless, Migrant or Runaway are eligible for free meals.

Child's First Name: S u z y MI: Child's Last Name: S m i t h School Name: **RECEIVED 8/3/20**

**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.

Child GROSS income: \$ How often? Weekly Bi-Weekly 2x Month Monthly

**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 How often? Weekly Bi-Weekly 2x Month Monthly Public Assistance/Child Support/Alimony How often? Weekly Bi-Weekly 2x Month Monthly Pensions/Retirement/All Other Income How often? Weekly Bi-Weekly 2x Month Monthly

**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 Check if no SSN

**STEP 4** Contact information and adult signature Mail Completed Form to: INSERT SCHOOL/DISTRICT MAILING ADDRESS

"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** Today's date: **07/29/20**

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 ☐ Error Prone

Determining Official's Signature: **Diane Jones** Date: **8/5/20**

☐ Case # Application ☐ Foster Application ☐ Directly Certified: Date of Disregard:

☐ Income Application Household Size: 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) 7/29/20, the date the household member signed it.
- B) 8/3/20, the date it was received by the school.
- C) 8/5/20, the date it was certified by Diane Jones at the school.

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	8/7/20

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





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	8/7/20

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

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

# Updating the Benefit Issuance Document



# Updating the Benefit Issuance Document

## When to Update the Benefit Issuance Document

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;
- the 30-Day Carryover is over;
- a household turns in an application that changes student eligibility status; and
- 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 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 direct certification was conducted.

# Updating the Benefit Issuance Document

## 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 the 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-price 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 Benefit Issuance Document

## Benefit Status Change

When a student is already certified for free meal benefits as Foster in CNP Direct Certification and they later match as SNAP, it is required to change their eligibility on the BID.

- 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 other household members.
- Using the diagram below, DC-SNAP takes precedence over DC-Foster.



# Updating the Benefit Issuance Document

## How do I Make a Change?

As a 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 most recently processed documentation.

- For example, Wiley Coyote was certified as free due to an application that was processed on 8/7/20. On 10/1/20, direct certification was conducted and Wiley matched in SNAP. The BID should be updated to reflect Wiley's new method/documentation (DC SNAP) and the date that direct certification was conducted (10/1/20).

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

SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/20
DeVil	Dusty	Reduced	Income App	9/17/20
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/20
Potter	Harry	Free	Foster App	9/3/20
Weasley	Ron	Free	DC SNAP	7/17/20
Weasley	William	Free	DC SNAP	7/17/20

# Updating the Benefit Issuance Document

## Does Your Benefit Issuance Document 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 10/1/20, which was when direct certification was conducted and Wiley matched in SNAP.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Coyote	Wiley	free	Income Application	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione	paid	No Documentation	
Lee	Brock	free	DC TANF	7/15/20
Potter	Harry	free	Foster Application	9/3/20
Weasley	Ron	free	DC SNAP	9/25/20
Weasley	William	free	DC SNAP	



SAMPLE BID				
Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Coyote	Wiley	free	DC SNAP	10/1/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione	paid	No Documentation	
Lee	Brock	free	DC TANF	7/15/20
Potter	Harry	free	Foster Application	9/3/20
Weasley	Ron	free	DC SNAP	9/25/20
Weasley	William			

# Updating the Benefit Issuance Document

## Beginning of the School Year & New Students

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 8/7/20 but did not submit an application until 9/15/20 which was processed for reduced-price meal benefits on 9/17/20. Below shows the BID during 8/7/20 - 9/17/20 when Dusty was paid and would have been paying full price for meals. Once the application was processed on 9/17/20, the BID is updated. Now Dusty is charged at the reduced-price rate.

### ***BID as of 8/7/20 – 9/17/20:***

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

### ***BID as of 9/17/20:***

Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Dusty	DeVil	reduced	Income Application	9/17/20



# Updating the Benefit Issuance Document

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

Children are eligible for school meal benefits throughout the school year they were approved in and up to 30 operating days into the following school year. The SFA will carry over meal benefits for 30 operating days beginning on the first operating day, or until a new eligibility determination is made.

For example, last year Brock Lee received free meal benefits based on an income application processed on 9/1/19. He did not submit a new application and was not a match in CNP Direct Certification. On the 30<sup>th</sup> operating day of the new school year (9/25/20), his eligibility status has changed to paid on the BID. It is best practice, but not a requirement, to include the date that carryover ended and the student changed to paid.

Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Lee	Brock	free	Income Application	9/1/19

Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Lee	Brock	paid	No Documentation	

# Updating the Benefit Issuance Document

## 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 SFA has created another column to the right 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	8/7/20	Withdrawn 10/5/20

# **Coding the Benefit Issuance Document**



# Coding the Benefit Issuance Document

## Protecting Student Eligibility

SFAs 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 students' information is protected would be an electronic point of service where students enter a PIN or scan their IDs. If students cannot see other students' eligibility statuses, no coding would be needed.
- An example where students' information isn't protected would 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.



**Example**

# Coding the Benefit Issuance Document

## Example of Coding the BID

In order to protect the students' information on the BID, the words free, reduced-price, 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.

***As a best practice, include a category for those students free eligible based on a household member’s direct certification match.***

Last Name	First Name	Benefit Status	Method/ Documentation	Certification Date
Weasley	William	free	DC SNAP	9/25/20



Last Name	First Name	Eligibility	Certification Date
Weasley	William	123401	9/25/20

### 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

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

# Coding the Benefit Issuance Document

## 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 answers.

CODED BID			
Last Name	First Name	Eligibility	Certification Date
Coyote	Wiley	123401	8/7/20
DeVil	Dusty		9/17/20
Granger	Hermione	989809	
Lee	Brock	321302	7/15/20
Potter	Harry	839206	9/3/20
Weasley	Ron	232301	9/25/20
Weasley	William		9/25/20

Answers

# Coding the Benefit Issuance Document

## 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 answers.

SAMPLE BID				
Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Coyote	Wiley	free	Income Application	8/7/20
DeVil	Dusty	reduced	Income Application	9/17/20
Granger	Hermione	paid	No Documentation	
Lee	Brock	free	DC TANF	7/15/20
Potter	Harry	free	Foster Application	9/3/20
Weasley	Ron	free	DC SNAP	9/25/20
Weasley	William	free	DC SNAP	9/25/20



CODED BID			
Last Name	First Name	Eligibility	Certification Date
Coyote	Wiley	123401	8/7/20
DeVil	Dusty	323208	9/17/20
Granger	Hermione	989809	
Lee	Brock	321302	7/15/20
Potter	Harry	839206	9/3/20
Weasley	Ron	232301	9/25/20
Weasley	William	323201	9/25/20

True or False: Every BID must be coded.

- A) True
- B) False





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 SFA to decide if the BID should be coded based on how their operation is set up as student eligibility must not be overtly identified.**

# Questions & 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 in CNP Direct Certification?***

- Yes. When children match in CNP Direct Certification, it is important to update this on your BID. The number of matched students will be referred to when submitting mandatory reports to ADE.

## 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?***

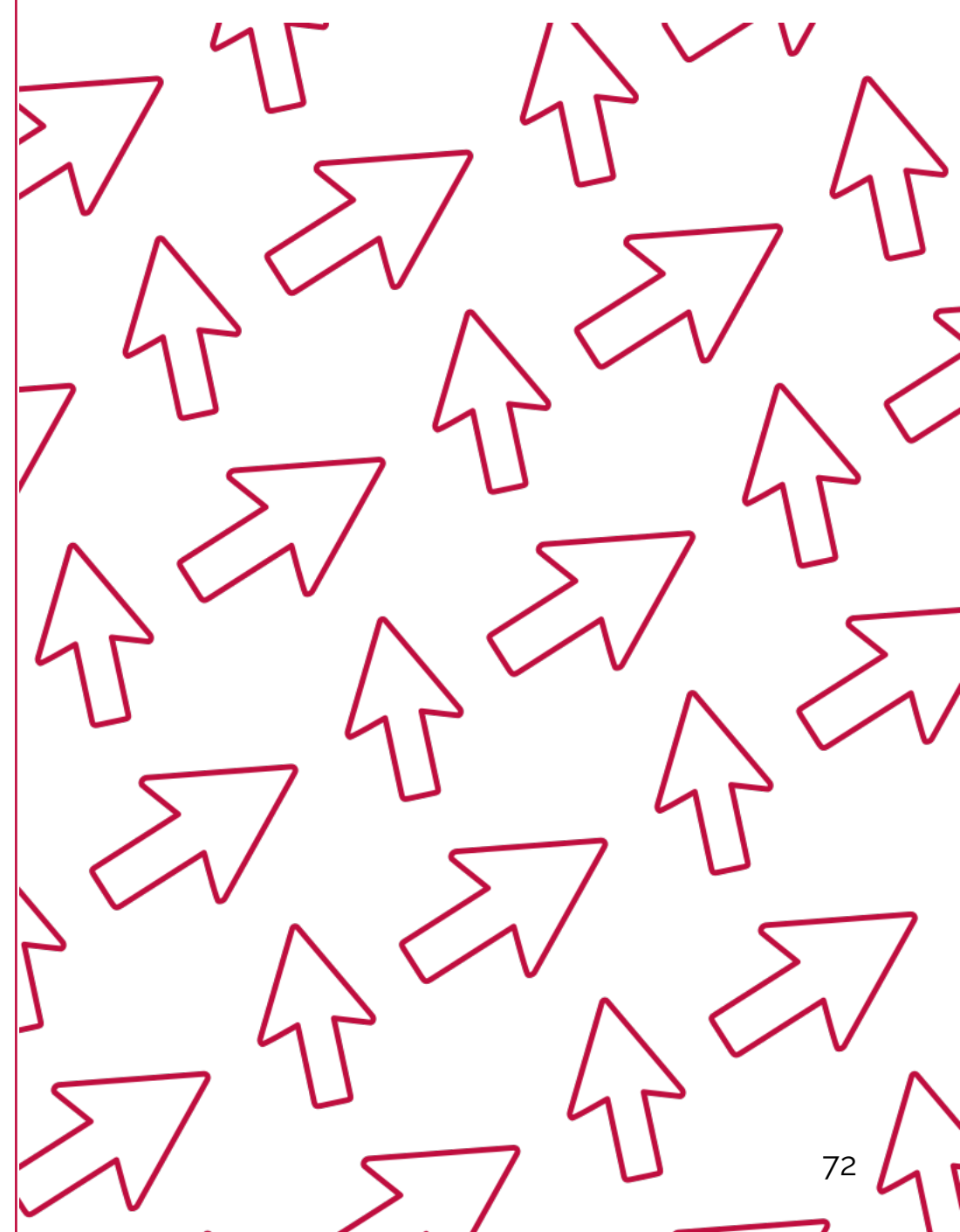
- It is important to write the type of category the child matched in for several reasons. First, if you do not record which category the child matched in, you will not know if you are able to extend free meal benefits to other household members. Additionally, ADE will ask specifically for the number 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

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If you have any questions about certifying students for meal benefits use the Eligibility Manual for School Meals on the [NSLP and SBP webpage](#) under the 'Guidance Manuals' accordion.

***For other questions about the BID, please contact your Health and Nutrition Services Specialist***





# Congratulations

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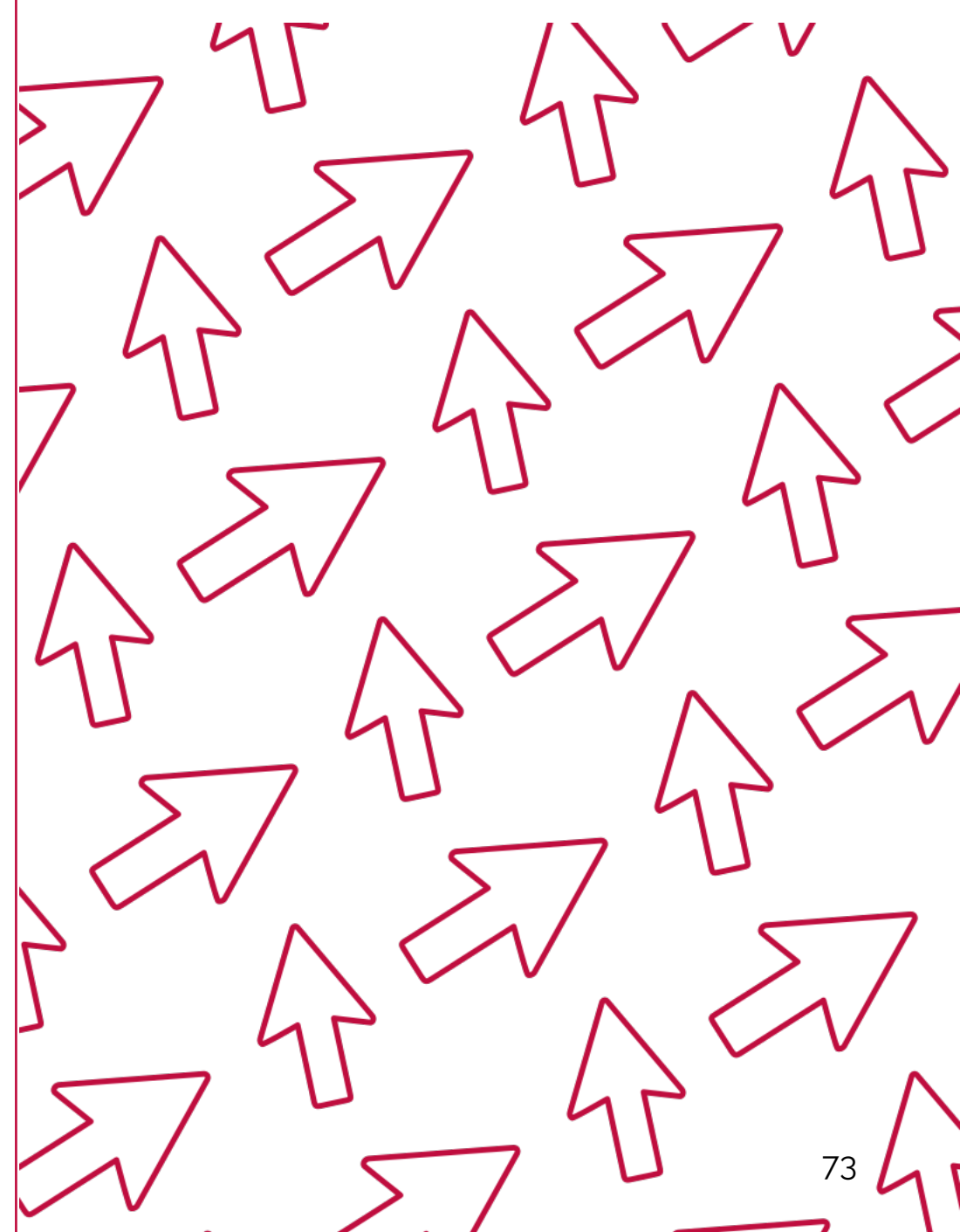
You have completed the Step-by-Step Instruction:  
***How to Create a Benefit Issuance Document***

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:** How to Create a Benefit Issuance Document
- **Learning Code:** 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.***



# Training Certificate

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Please click on the link below to complete a brief survey about this training. Once the survey is complete, you will be able to print your certificate of completion from Survey Monkey.

***\*This will not appear in your Event Management System (EMS) Account***

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

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

- Training Title: ***How to Create a Benefit Issuance Document***
- Professional Standards Learning Code: **3110, 3120**



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*<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](mailto:program.intake@usda.gov)*

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