

How to Create a Benefit Issuance Document (BID)

STEP-BY-STEP INSTRUCTION

Revised June 2020

Professional Standards Learning Code: 3110, 3120



Arizona Department of Education (ADE)

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

Intended Audience

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

Information to include when documenting this training for Professional Standards:

Training Title: How to Create a Benefit Issuance Document (BID)

Key Area: 3000 – Administration

Learning Codes: 3110, 3120

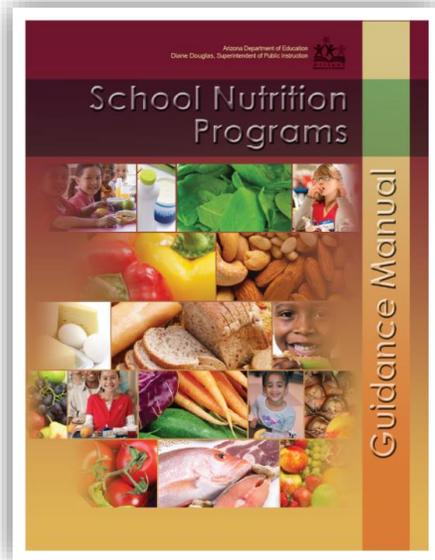
Length: 1 hour



Objectives

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

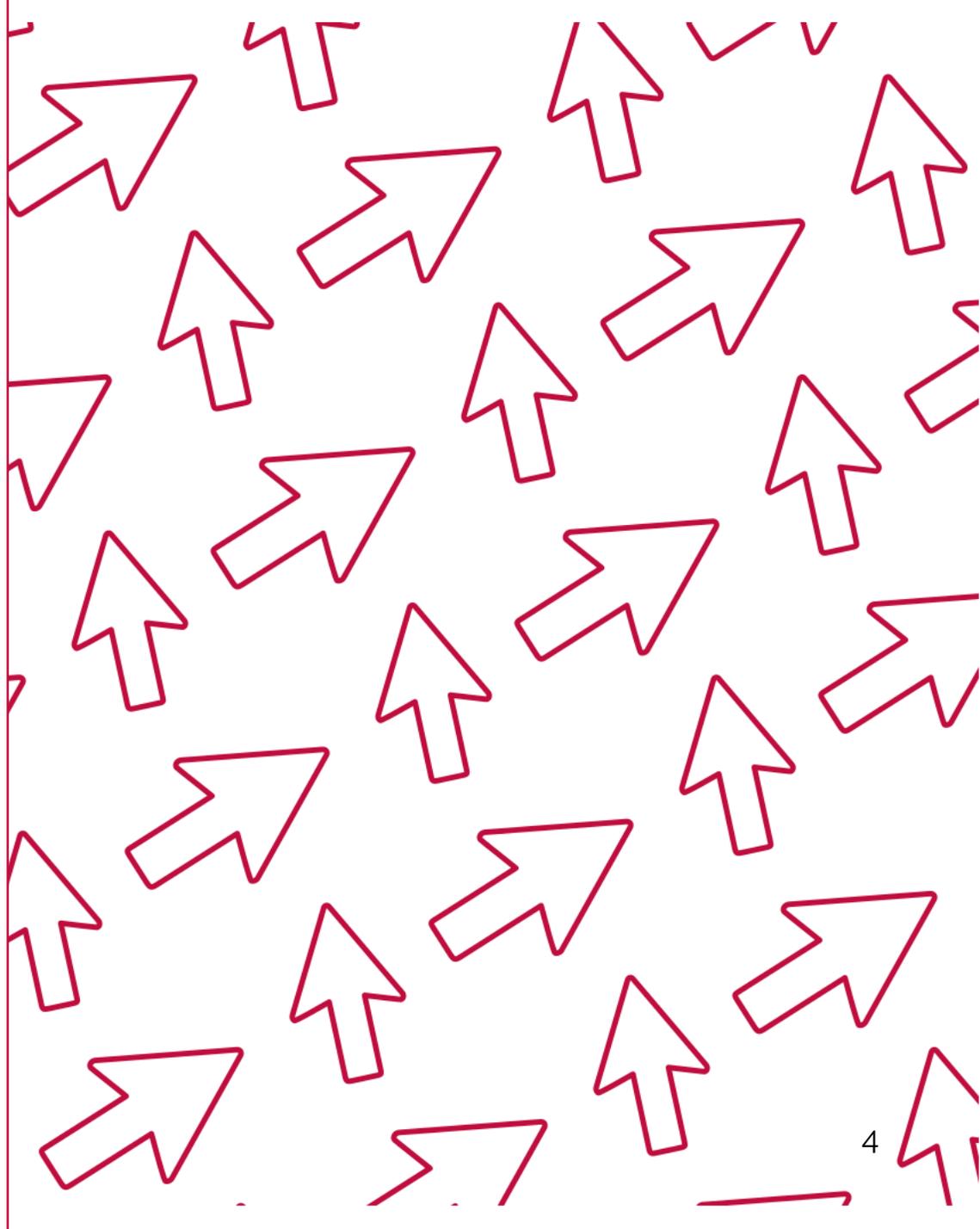
- read a Benefit Issuance Document (BID);
- understand what is required on a BID;
- record individual student eligibility information on the BID; and
- understand how to update an individual student's eligibility information on the BID.



The instruction within this How-To Guide is based on guidance from ADE's School Nutrition Programs Guidance Manual, 2016.

- Section 3.7- Eligibility Documentation (pages 30-31)

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, 2017.



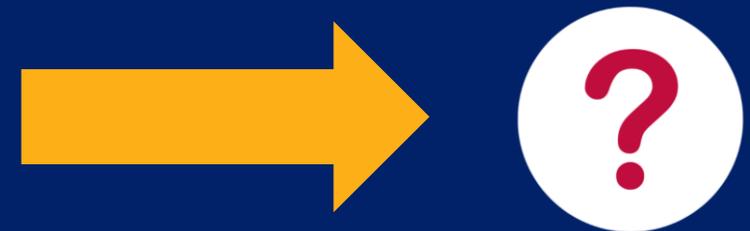
Definitions

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 SFA 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, type of documentation that is on file supporting that benefit eligibility, and the date the documentation was processed.

- 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 BID	Slides 9 – 15
Creating the BID	Slides 16 – 49
Updating the BID	Slides 50 – 58
Coding the BID	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 **SY 20-21 Enrollment List**. You will need these handouts to complete this training.

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

[SY 20-21 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, or paid).

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

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 Benefit Issuance Document (BID).

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.

It is recommended to include all enrolled students (Free, Reduced and Paid).

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

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 LEA 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 BID

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.
- 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

Introduction to the Benefit Issuance Document

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.

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 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 8/15/20.

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 (BID)



Creating the Benefit Issuance Document (BID)

Materials Needed to Create 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 20-21 Enrollment List**.

SAMPLE BID				

[Sample BID](#)

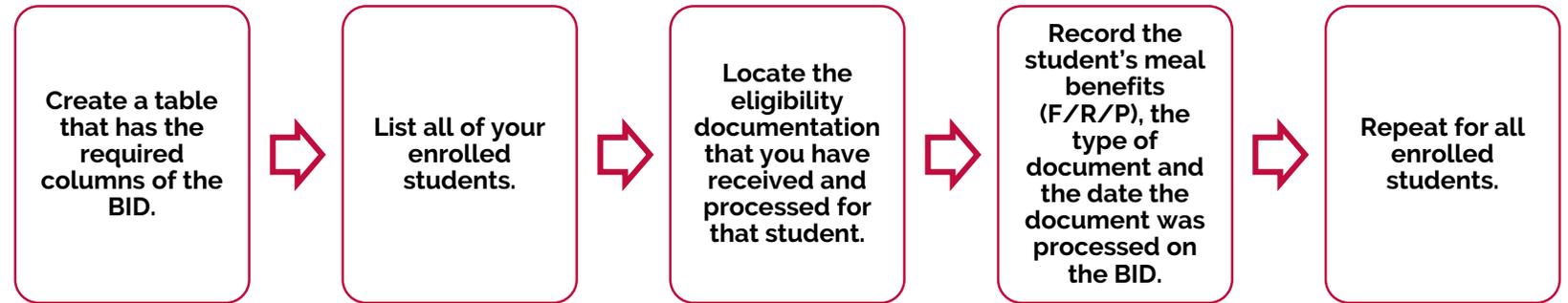
ENROLLMENT EXAMPLE		
First Name	Last Name	School Name
Wiley	Coyote	Dry Desert High
Dusty	DeVil	Dry Desert High
Hermione	Granger	Dry Desert High
Brock	Lee	Dry Desert High
Harry	Potter	Dry Desert High
Ron	Weasley	Dry Desert High
William	Weasley	Dry Desert High

[SY 20-21 Enrollment](#)



Creating the Benefit Issuance Document (BID)

Materials Needed to Create the BID

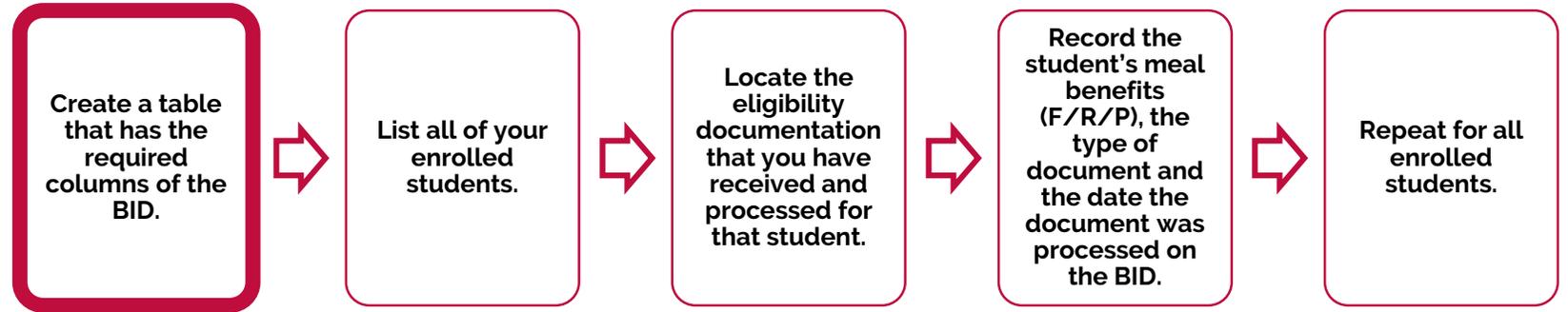


- Together we will fill in the *Sample BID* following the steps listed above.
- The pencil will help you follow where information was filled into the *Sample BID*.
- Please refer back to the previous slides at any point throughout this training.

SAMPLE BID			



Creating the Benefit Issuance Document (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 Benefit Issuance Document (BID)



Using the **SY 20-21 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 (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 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 (BID)



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 (BID)



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			

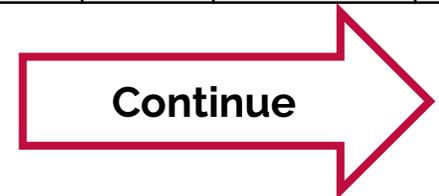
Creating the Benefit Issuance Document (BID)



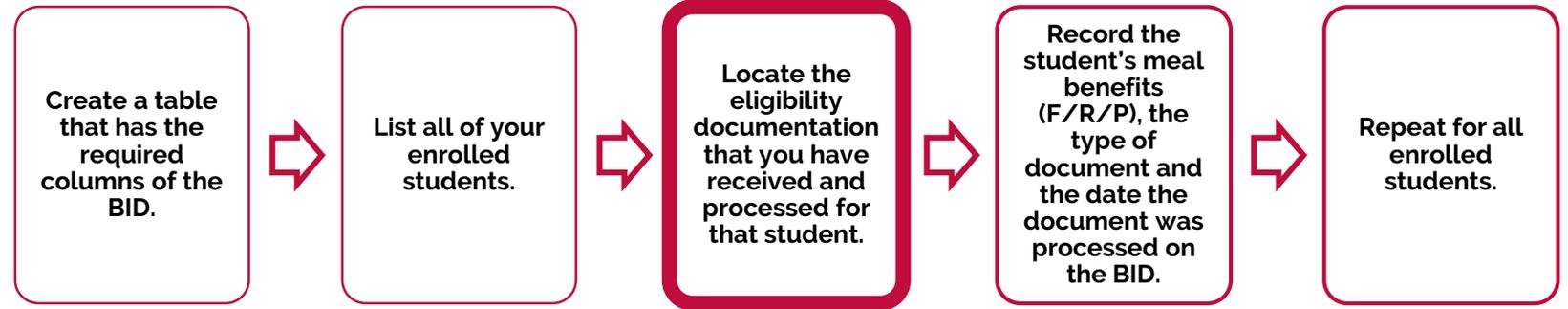
All of the required information for Wiley Coyote has been entered into the BID.

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	8/7/20
DeVil	Dusty			
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			



Creating the Benefit Issuance Document (BID)



Dusty DeVil

- On file there is a household application that has been processed based on income that certified Dusty DeVil as Reduced 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 (BID)



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



Creating the Benefit Issuance Document (BID)



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 (BID)



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 (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	8/7/20
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 (BID)



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.

Result: All

Show 10 entries

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

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Creating the Benefit Issuance Document (BID)



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 (BID)



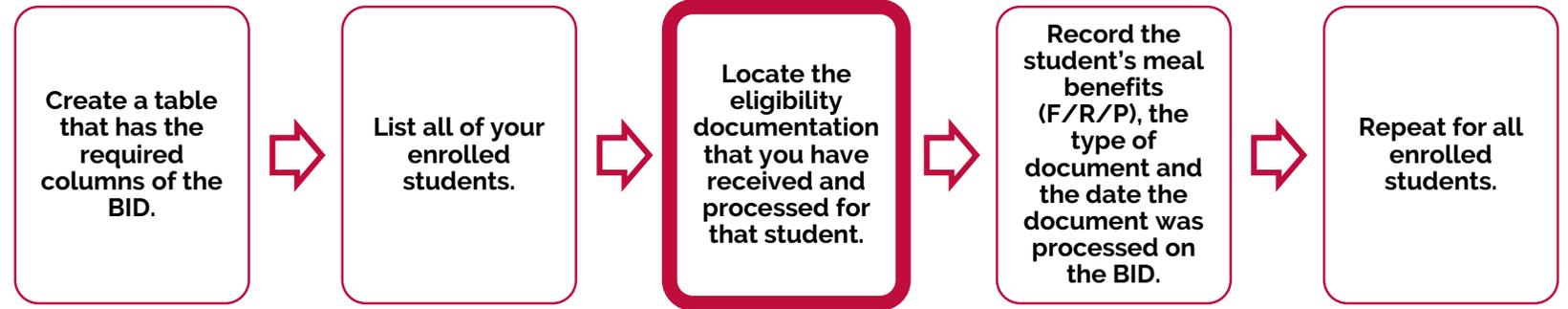
All of the required information for Brock Lee has been entered into the BID.

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	8/7/20
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 (BID)



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 (BID)



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			

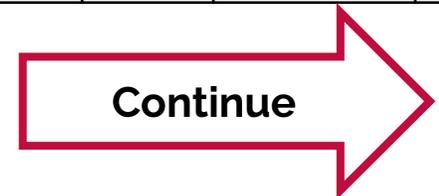
Creating the Benefit Issuance Document (BID)



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 (BID)



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.

Result: All

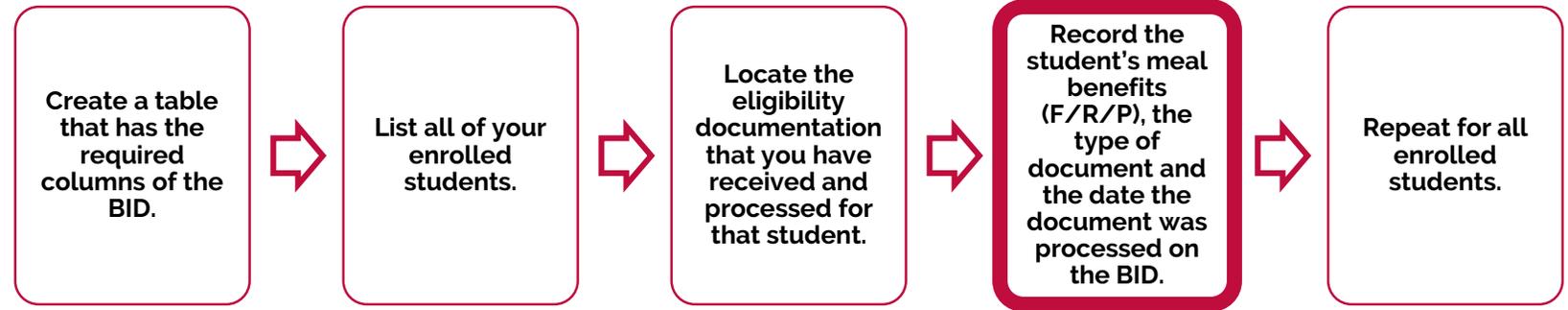
Show 10 entries

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

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Creating the Benefit Issuance Document (BID)



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 (BID)



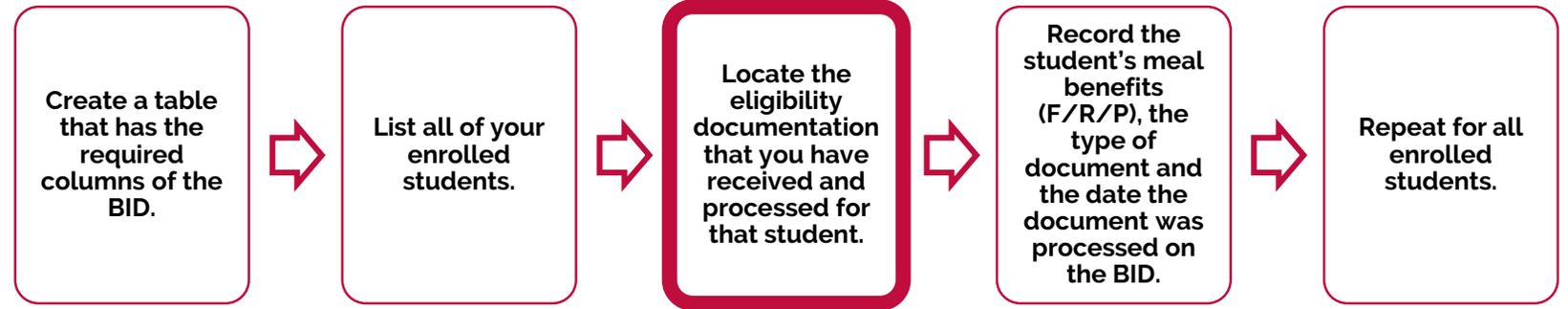
All of the required information for Ron Weasley has been entered into the BID.

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 (BID)



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 matched in SNAP and TANF. SNAP or TANF matches extends benefits to all household members; therefore, William is also Free.

Result: All

Show 10 entries

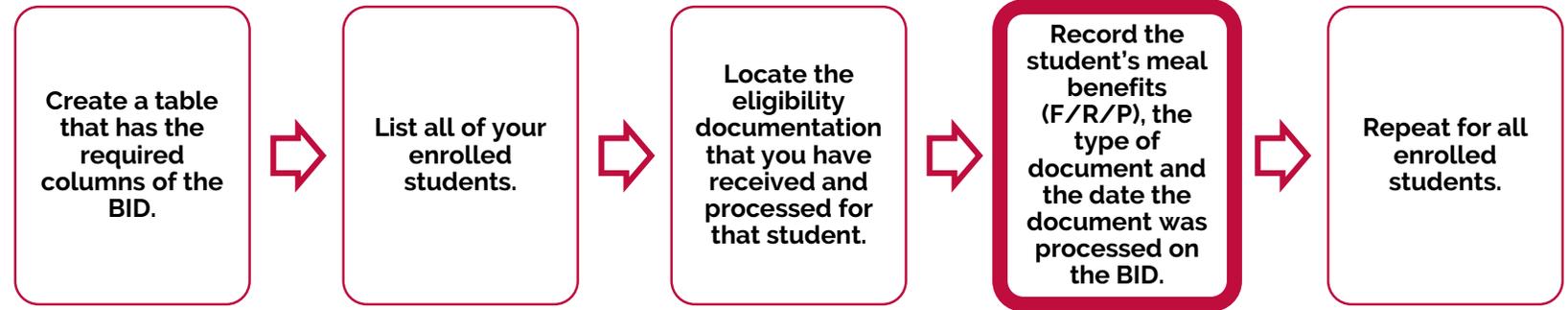
Search:

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

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Creating the Benefit Issuance Document (BID)



Record the information on the row for William Weasley.

- Under *Benefit Status* record Free.
- Under *Method/Documentation*, we will write DC SNAP. Any time a student does not match, but their household member matches in either SNAP, TANF, or FDPIR, record what the household member matched in.
- 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	9/25/20

Which of the following is not required on the BID?

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



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.

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
- C) Reduced; DC SNAP
- 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**
- C) Reduced; DC SNAP
- 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.

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 (BID)



Updating the Benefit Issuance Document (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;
- 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 (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 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 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 (BID)

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 (BID)

How Do I Make a Change to the BID?

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 run 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	Henry	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 (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 10/1/20, which was when 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	8/7/20
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 (BID)

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 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 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 (BID)

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 LEA 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 Dusty DeVil 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 30th operating day of the new school year (9/25/20), 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 8/4/20 (first operating day):

Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
Dusty	DeVil	Free	Income Application	9/1/19

BID as of 9/25/20 (30th operating day):

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

Updating the Benefit Issuance Document (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 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 (BID)



Coding the Benefit Issuance Document (BID)

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. As long as 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 (BID)

Example of Coding the BID

In order to protect the students' 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	9/25/20



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

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 (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 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 (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 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.

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?

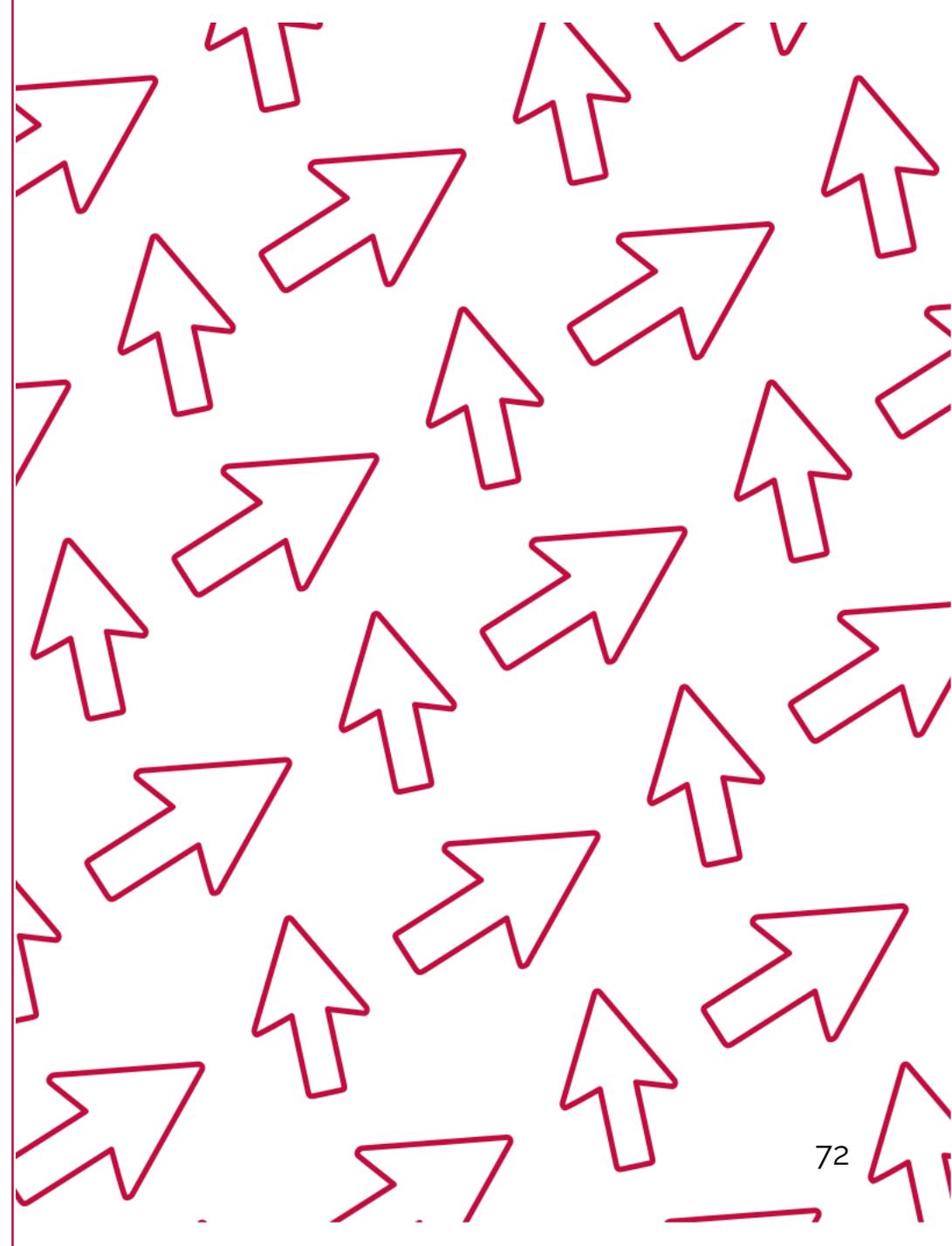
- It is important to write the type of category the child matched in for several reasons. First, if you do not record which category the child matched in, you will not know if you are able to extend free meal benefits to other household members. Additionally, ADE will ask specifically for the number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

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/hns/nslp/programguidance/>

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



Congratulations

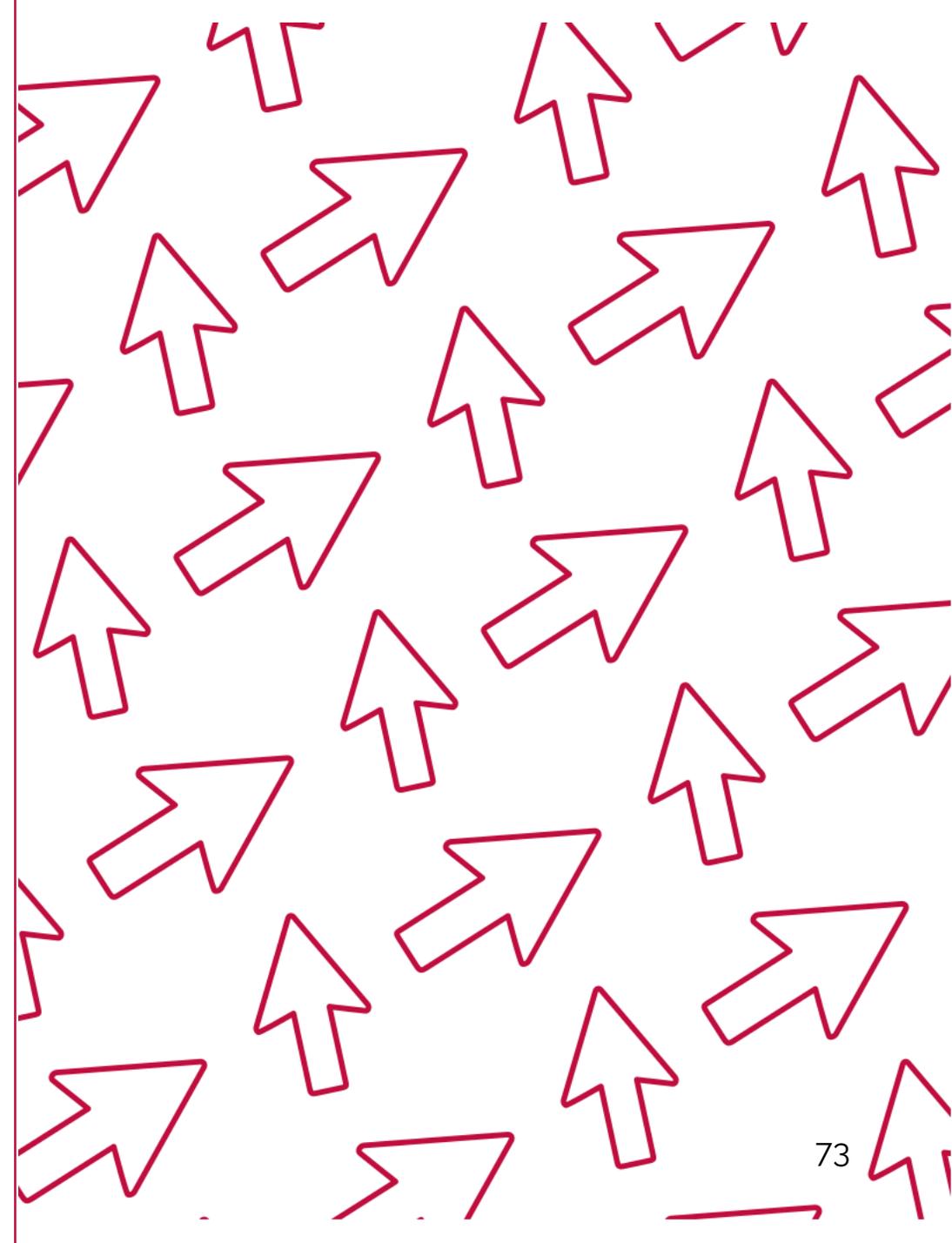
You have completed the Step-by-Step Instruction:
How to Create a Benefit Issuance Document (BID)

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 (BID)
- **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

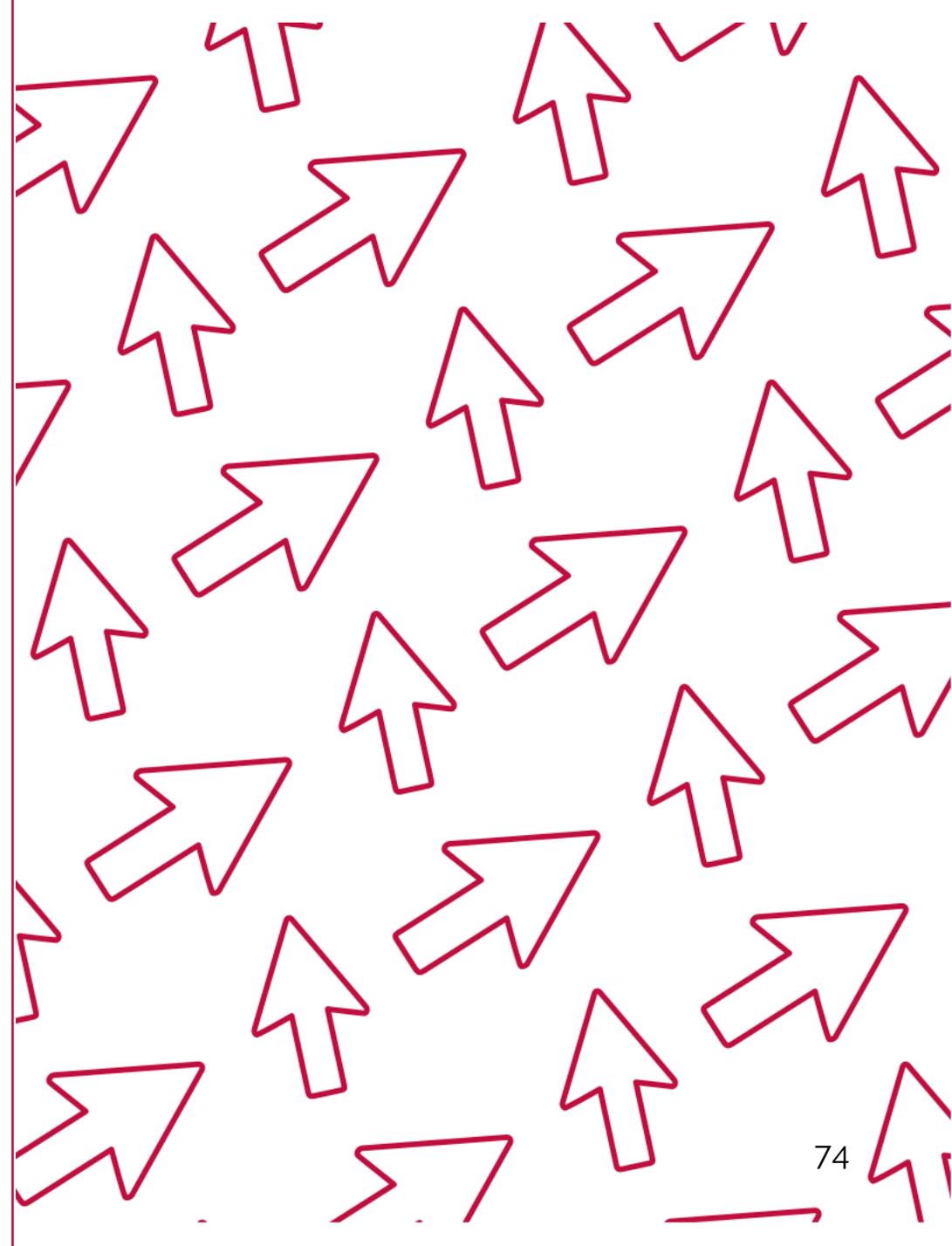
Please click on the link below to complete a brief survey about this training. Once the survey is complete, you will be able to print your certificate of completion from Survey Monkey.

**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 (BID)***
- Professional Standards Learning Code: **3110, 3120**





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