How to Create a Benefit Issuance Document



Health and Nutrition Services Arizona Department of Education





Disclaimer

This training was developed by the Arizona Department of Education (ADE) Health and Nutrition Services Division (HNS). The content in this training is intended for professionals operating one or more USDA Child Nutrition Programs in Arizona under the direction of ADE. The information in this training is subject to change. Attendees are encouraged to access professional development materials directly from the training library to prevent use of outdated content.

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.

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.

TRAINING HOURS

Information to include when documenting this training for Professional Standards:

- **Training Title:** How to Create a Benefit Issuance Document
- Key Area: 3000 Administration
- Learning Code: 3110, 3120
- Length: 1 hour





The instruction within this Online Course is based on guidance from USDA's Eligibility Manual For School Meals, 2017.

It is recommended to review this manual in addition to reviewing this course for complete guidance on processing and verifying household applications.

<u>Click here</u> to access the manual.

	Last Nan	ne	First Name	Benefit	t Status	Method Documentation	n	Certification Date
	644						·	ENDOL
	SAI	MPLE						ENROL
Last Name	First Name	Benefit Statu	us Method Ce Documentation	ertification Date				First Name
					-			Wiley
								Dusty
								Hermione
5		-				[Brock
			_					Harry
63								Ron
								William

Sample BID

Enrollment

MENT EXAMPLE

School Name

Dry Desert High

Last Name

Coyote

DeVil

Granger

Lee

Potter

Weasley

Weasley

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.

Definitions

Benefit Issuance Document

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.

Quiz Time



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.

The question mark icon below will indicate a comprehension quiz question.



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Section 1: Introduction to the Benefit Issuance Document Section 2: Creating the Benefit Issuance Document Section 3: Updating the Benefit Issuance Document Section 4: Coding the Benefit Issuance Document Section 5: Questions & Answers



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

Introduction to the Benefit Issuance Document

SECTION 1



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, reducedprice, 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, which identifies the various eligibility documentation.

FREE

CNP Direct Certifica Match Results

Liaison Lists for Home Migrant, Runawa

Household Applicati (Case number, incor foster)

Agency Documenta

SLIDE 10

	REDUCED	PAID
tion	Household Applications based on Income	No documentation on file
eless, y	Directly Certified for Medicaid - Reduced	Submitted Incomplete Household Applications
ions me,		Submitted Household Applications where income is too high
tion		

	SA	MPLE B	ID	
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/24
Potter	Harry	Free	Foster Application	9/3/24
Weasley	Ron	Free	DC SNAP	7/17/24
Weasley	William	Free	DC SNAP	7/17/24

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

Benefit Issuance Document

All eligibility determinations should be recorded

SAM	PL	E	BI	D

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/24
Potter	Harry	Free	Foster Application	9/3/24
Weasley	Ron	Free	DC SNAP	7/17/24
Weasley	William	Free	DC SNAP	7/17/24

Benefit Issuance Document **REQUIRED INFORMATION**

The BID contains the:

If the SFA has more than one site operating, a column should be added for site name.

• 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.

SAMPLE DID

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/24
Potter	Harry	Free	Foster Application	9/3/24
Weasley	Ron	Free	DC SNAP	7/17/24
Weasley	William	Free	DC SNAP	7/17/24

HOW TO READ

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

For example,

SLIDE 13

Benefit Issuance ocument

• Dusty DeVil has reduced-price meal benefits due to an income application.

• The application was certified on 9/17/24.

|--|

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/24
Potter	Harry	Free	Foster Application	9/3/24
Weasley	Ron	Free	DC SNAP	7/17/24
Weasley	William	Free	DC SNAP	7/17/24

HOW TO READ

Each <u>column</u> is a required part of a BID, and each row is a student.

For example,

on file for her.

SLIDE 14

Benefit Issuance ocument

• Hermione Granger receives paid meal benefits because there is no documentation

|--|

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/24
Potter	Harry	Free	Foster Application	9/3/24
Weasley	Ron	Free	DC SNAP	7/17/24
Weasley	William	Free	DC SNAP	7/17/24

HOW TO READ

Each <u>column</u> is a required part of a BID and each row is a student.

For example,

- 8/15/24.

Benefit Issuance ocument

• Brock Lee receives free meal benefits because he matched in the TANF column in CNP Direct Certification.

• The CNP Direct Certification was run on

Creating the Benefit Issuance Document

SECTION 2



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 Example**.



Last

SAMPLE BID

Name	First Name	Benefit Status	Method Documentation	Certification Date

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 List Example

Creating 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.

SLIDE 18

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

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



Repeat for all enrolled students.



SAMPLE BID

Last Name	First Name	Benefit Status	Method Documentation	Certification Date

column:

- Last Name
- First Name

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

Repeat for all enrolled students.

Creating the BID

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

• Benefit Status

Method/Documentation

Certification Date



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

Using the Enrollment List, list all of the students' names in the columns titled *Last Name*, and First Name.

SLIDE 20

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

Repeat for all enrolled students.

Creating the BID

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



	SAM	PLE	B	D
--	-----	-----	---	---

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/24
Potter	Harry	Free	Foster Application	9/3/24
Weasley	Ron	Free	DC SNAP	7/17/24
Weasley	William	Free	DC SNAP	7/17/24

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

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

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

Repeat for all enrolled students.

Creating the BID

• Benefit Status, • Method/Documentation, and Certification Date.

CREATING THE BENEFIT ISSUANCE DOCUMENT **SECTION 2**



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 8/7/24

OFFICE USE ONLY	
Eligibility: Free ✓ Reduced Denied Denied Jonah Hill Date: _8/7/ Determining Official's Signature: Jonah Hill Date: _8/7/	24
Case # Application Foster Application Directly Certified: Date of Disregard Income Application Homeless/Migrant/Runaway Household Size: _4 Total Income: 2,000 Per: Week Bi-Weekly (Every 2 Weeks) 2x Month Selected For Verification: Confirming Official's Signature: Follow-Up Official's Signature: Date:	Section of the Section of the household application that must be filled out by SFA.

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

Repeat for all enrolled students.



SAM	PLE	B	D

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty			
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

Coyote.

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

Repeat for all enrolled students.

Creating the BID

Record the information in the row for Wiley

• Under Benefit Status, record free.

• Under *Method/Documentation*, record

Income Application.

• Under *Certification Date*, record the date the application was processed (8/7/24).

CREATING THE BENEFIT ISSUANCE DOCUMENT **SECTION 2**



SA	Μ	Pl	E	B	D

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty			
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

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

Now, we will enter information for Dusty DeVil.

SLIDE 24

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

Repeat for all enrolled students.

Creating the BID



Dusty DeVil

• On file there is a household application that has been processed based on income that certified Dusty DeVil as reduced-price on 9/17/24

(OFFICE USE ONLY		
Eligibility: Free Reduced Denied Determining Official's Signature:	Jonah Hill Date: 9/17/24		
Case # Application Foster Application Household Size: Household Size: Total Income: Per: Week Bi-Week Bi-Week Selected For Verification: Confirming Official's Follow-Up Official's Signature:	Directly Certified: Date of Disregard: naway /eekly (Every 2 Weeks) 2x Month Monthly s Signature: Date:	DAnnual ho te: th	Section of the ousehold application at must be filled out by SFA.

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

Repeat for all enrolled students.



SAM	PLE	B	D

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

Record the information in the row for Dusty DeVil

- Under *Certification Date*, record the date the application was processed (9/17/24).

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

Repeat for all enrolled students.

Creating the BID

- Under *Benefit Status*, record free.
- Under *Method/Documentation*, record
 - Income Application.

CREATING THE BENEFIT ISSUANCE DOCUMENT **SECTION 2**



SAM	Pl	. E	B	D

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

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

Granger.

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

Repeat for all enrolled students.

Creating the BID

Now, we will enter information for Hermione



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.

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

Repeat for all enrolled students.



SAM	PLE	B	D

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No docs	
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

Granger.

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

Repeat for all enrolled students.

Creating the BID

Record the information in the row for Hermione

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



SA	M	PL	Ξ	B	D

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No docs	
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

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

Now, we will enter information for Brock Lee.

SLIDE 30

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

Repeat for all enrolled students.

Creating the BID

CREATING THE BENEFIT ISSUANCE DOCUMENT **SECTION 2**



Brock Lee

• On file, there is a printed <u>CNP Direct Certification match result</u> that was run on <u>7/15/24</u>. He was a match in <u>TANF</u>.

Show 10 🗸 entrie	25	Result:	All	~	
First Name	A Last Name	🗧 Birth Date	Result	🗧 Result Date	Decision Date
Brock	Lee	02/02/2008	Match	7/15/2024	

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

Repeat for all enrolled students.

Eligibility Type	Possible Duplicate		
TANF			
	Previous	1	Ne

CREATING THE BENEFIT ISSUANCE DOCUMENT **SECTION 2**



	SAM	PLE	B	D
--	-----	-----	---	---

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No docs	
Lee	Brock	Free	DC TANF	7/15/24
Potter	Harry			
Weasley	Ron			
Weasley	William			

Record the information in the row for Brock Lee.

- 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 (7/15/24).

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

Repeat for all enrolled students.

Creating the BID

• Under **Benefit Status**, record free.



	SA	Μ	Pl	E	B	D
--	----	---	----	---	---	---

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No Docs	
Lee	Brock	Free	DC TANF	7/15/24
Potter	Harry			
Weasley	Ron			
Weasley	William			

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

Now, we will enter information for Harry Potter.

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

Repeat for all enrolled students.

Creating the BID



Dusty DeVil

• On file there is a household application that has been processed that has been processed as free on <u>9/3/24</u> with the box <u>Foster</u> checked off.

OFFICE USE ONLY	
Eligibility: Free Reduced √ Denied Denied Jonah Hill Date: _9/3/24 Determining Official's Signature: Jonah Hill Date: _9/3/24	
Case # Application Income Application Income Application Homeless/Migrant/Runaway Household Size:	CAnnual Section of the household application that must be filled out
Follow-Up Official's Signature: Date:	by SFA.

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

Repeat for all enrolled students.



SAM	PLE	BID	

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No docs	
Lee	Brock	Free	DC TANF	7/15/24
Potter	Harry	Free	Foster Application	9/3/24
Weasley	Ron			
Weasley	William			

Potter.

- Under Benefit Status, record free.
- Under **Certification Date** record the date the application was processed (9/3/24)

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

Repeat for all enrolled students.

Creating the BID

Record the information in the row for Harry

- Under *Method/Documentation*, record
 - **Foster Application**

CREATING THE BENEFIT ISSUANCE DOCUMENT **SECTION 2**



SA	MP	LE	B	D

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No docs	
Lee	Brock	Free	DC TANF	7/15/24
Potter	Harry	Free	Foster Application	9/3/24
Weasley	Ron			
Weasley	William			

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

Now, we will enter information for Ron Weasley.

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

Repeat for all enrolled students.

Creating the BID
SECTION 2 CREATING THE BENEFIT ISSUANCE DOCUMENT



Ron Weasley

• On file, there is a printed <u>CNP Direct Certification</u> match result that was run on <u>9/25/24</u>. He was a match in <u>SNAP</u> and <u>TANF</u>.

12		Result:	All	~	
Show 10 V entrie	* Last Name	Birth Date	Result	Result Date	Decision Date
Ron	Weasley	06/22/2005	Match	9/25/24	

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



	Search:	
Eligibility Type	Possible Duplicate	
SNAP, TANF		
	Previous	1 Ne

CREATING THE BENEFIT ISSUANCE DOCUMENT **SECTION 2**



SAM	PL	E	B	D

Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No docs	
Lee	Brock	Free	DC TANF	7/15/24
Potter	Harry	Free	Foster App	9/3/24
Weasley	Ron	Free	DC Snap	9/25/24
Weasley	William			

Weasley

- 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 <u>(9/25/24)</u>.

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

Repeat for all enrolled students.

Creating the BID

Record the information in the row for Ron

• Under **Benefit Status**, record free.

SECTION 2 CREATING THE BENEFIT ISSUANCE DOCUMENT



	SAN	IPLE	BID	
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No Docs	
Lee	Brock	Free	DC TANF	7/15/24
Potter	Harry	Free	Foster App	9/3/24
Weasley	Ron	Free	DC SNAP	9/25/24
Weasley	William			

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

Weasley.

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

Repeat for all enrolled students.

Creating the BID

Now, we will enter information for William

SECTION 2 CREATING THE BENEFIT ISSUANCE DOCUMENT



William Weasley

• On file, there is a printed CNP Direct Certification match result that was run on 9/25/24. William is a No <u>Match</u>; 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.

		Result:	All	~	
First Name	* Last Name	Birth Date	Result	Result Date	Decision Date
William	Weasley	06/22/2005	No Match	9/25/24	

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



	Search:	
	Possible Duplicate	Eligibility Type
1 Ne	Previous	

CREATING THE BENEFIT ISSUANCE DOCUMENT **SECTION 2**



Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No docs	
Lee	Brock	Free	DC TANF	7/15/24
Potter	Harry	Free	Foster App	9/3/24
Weasley	Ron	Free	DC SNAP	9/25/24
Weasley	William	Free	DC SNAP - extended	9/25/24

Creating the BID

Record the information in the row for Ron 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 <u>(9/25/24)</u>.

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

Repeat for all enrolled students.

Which of the following is <u>not</u> required on the BID?

A Student Name

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



Which of the following is <u>not</u> required on the BID?

A Student Name	St
	or
Benefit Status (free/reduced-price/paid)	in
	be
C Birthdate	wi
	ce
D Certification Date	st
	th

tudent birthdates are not needed in the BID. It is only required to clude information about the enefit status of the child along ith the documentation/method of ertification and the date the sudent was certified to receive nose 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?

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



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?

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B Free, DC SNAP-Extended	st
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Unsure, It would depend on additional information from the household D

ny time a student matches in NAP, TANF, and/or FDPIR, that udent and all other students in nat household are directly ertified.



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** 7/29/24, the date the household member signed it.
- **B** 8/3/24, the date it was received by the school.
- **C** 8/5/24, the date it was certified by Diane Jones at the school.

Child's First Name Mile Child's Last Name School Nam	L	nfants	, ch	Idren	ı, an	d stu	iden	ts up	to ar	nd i	nclu	ding g	rade 1	12 in	your he	usehole	l (if mo	re spa	ces ar	re requ	red fo	radditi	ional na	mes,	attaci	anothe	rshee	et of pape	ar)
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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 7/29/24, the date the household member signed it.

B 8/3/24, the date it was received by the school.

C 8/5/24, the date it was certified by Diane Jones at the school.

023-2024 App omplete one applic	ation per household. Please use a pen (not a penci	School Meals	
STEP 1 List AL	L infants, children, and students up to and includ	ing grade 12 in your household (if more spaces	are required for additional names, attach another sheet of paper)
finition of Household mber: "Anyone who is ng with you and shares one and expenses, en Enotrelated." Editen in Foster care 1 children who meet the inition of Homeless, grant of Runaway are able for free meals.	Child's First Name	MI Child's Last Name Simith	School Name
TEP 2 Do any	y Household Members (including you) currently p If you answered NO > Complete STEP 3. If you an	participate in one or more of the following ass swered YES > Write a case number here then go to STEF	sistance programs: SNAP, TANF, or FDPIR? Circle one: Yes / No P 4 (Do not complete STEP 3) Case Number:
TEP 3 Repor	t Income for ALL Household Members (Skip the	s step if you answered 'Yes' to STEP 2)	Write only one case number in this space
you unsure what ome to include e? to the back of this plication and review charts titled purces income" for more ormation. e 'Sources of Income Children' chart will p you with the Child ome Section. a 'Sources of Income Adults' chart will help with the Adult usehold Members ome Section.	A. Child Income Sometimes children in the household earn income. Please ind Household Members listed in STEP 1 here. B. All Adult Household Members (including yourself) ex and deductions) for each source in whole dollars only. If they Name of Adult Household Members (First and Last) GROSS Earnings fro S S S S S S S S S S S S S S S S S S S	lude the TOTAL GROSS income earned by all Children self) ren if they do not receive income. For each Household Me do not receive income from any source, write '0'. If you enter How often? Weekly B-Weekly brittom Momentation Weekly B-Weekly brittom Momentation Weekly B-Weekly brittom Momentation Subject Total Group Statementation Subject Total Gr	How often? Child GROSS income Weakly Is Vasely Dot Marth Mentity amber listed, if they do receive income, report total GROSS income (amount before taxe r 0' or leave any fields blank, you are certifying (promising) that there is no income to re 10' or leave any fields blank, you are certifying (promising) that there is no income to re 10' or leave any fields blank, you are certifying (promising) that there is no income to re 10' Or leave any fields blank, you are certifying (promising) that there is no income to re 10' Or leave any fields blank, you are certifying (promising) that there is no income to re 10' Or leave any fields blank, you are certifying (promising) that there is no income to re 10' Or leave any fields blank, you are certifying (promising) that there is no income to re 10' Or leave any fields blank, you are certifying (promising) that there is no income to re 10' Or leave any fields blank, you are certifying (promising) that there is no income to re 10' Or leave any fields blank, you are certifying (promising) that there is no income to re 10' Or leave any fields blank 10' Or leave any fields blank 10' Or leave any fields blank 10' Or leave any fields blank 10' Or leave any fields blank 10' Or leave any fields blank 10' Or leave any fields blank 10' Or leave any fields blank 10' Or leave any fields blank
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TEP 4 Conta	ct information and adult signature Mail Co	mpleted Form to: UNSERT SCHOOL/DIST	TRICT MAILING ADDRESS
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True or False: The BID below contains all the required information for a BID.

Last Name	First Name	School Name	Benefit Status
Flinstone	Fred	Desert High School	Free

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

Certification Date

8/7/24



True or False: The BID below contains all the required information for a BID.

Last Name	First Name	School Name	Benefit Status
Flinstone	Fred	Desert High School	Free

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

Certification Date 8/7/24

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



Updating the Benefit Issuance Document

SECTION 3



Benefit Issuance Document

WHEN TO UPDATE

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.

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 <u>increased their meal benefits</u> or if the new category can <u>extend</u> 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.

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.



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 8/7/24. On 10/1/24, 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 (10/1/24).

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

On your Sample BID, practice making this change.

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 10/1/24, which was when direct certification was conducted and Wiley matched in SNAP.

	SAMPLE BID						SA	MPLE	BID	
Last Name	First Name	Benefit Status	Method Documentation	Certification Date		Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24		Coyote	Wiley	Free	DC SNAP	10/1/24
DeVil	Dusty	Reduced	Income App	9/17/24		DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No docs			Granger	Hermione	Paid	No docs	
Lee	Brock	Free	DC TANF	7/15/24		Lee	Brock	Free	DC TANF	7/15/24
Potter	Harry	Free	Foster App	9/3/24		Potter	Harry	Free	Foster App	9/3/24
Weasley	Ron	Free	DC SNAP	9/25/24		Weasley	Ron	Free	DC SNAP	9/25/24
Weasley	William	Free	DC SNAP - extended	9/25/24		Weasley	William	Free	DC SNAP - extended	9/25/24

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 8/7/24 but did not submit an application until 9/15/24 which was processed for reduced-price meal benefits on 9/17/24. Below shows the BID during 8/7/24 - 9/17/24 when Dusty was paid and would have been paying full price for meals. Once the application was processed on 9/17/24, the BID is updated. Now Dusty is charged at the reduced-price rate.

BID as of 8/7/24 - 9/17/24

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

BID as of 9/17/24:

Last Name	First Name	Benefit Status	Method/Documentation	Certification Date
DeVil	Dusty	Reduced	Income Application	9/17/24

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 9/1/23. 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 (9/25/24), 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
Lee	Brock	Free	Income Application

Last Name	First Name	Benefit Status	Method/Documentation
Lee	Brock	Paid	No Documentation

on	Certification Date
	9/1/23
on	Certification Date

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
Wiley	Coyote	Free	Income Application	8/7/24	Withdrawn 10/5/24

Coding the Benefit Issuance Document

SECTION 4



Coding the 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. 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.

Coding the BID

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 Da
Weasley	William	Free	DC SNAP	9/5/24
Last Name	First Name		Eligibility	Certification Da
Weasley	William		123401	9/5/24

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
Арр
Four random numbers + 05=Free by Case #
Арр
Four random numbers + 06=Free by Foster
Арр
Four random numbers + 07=Free by H/M/R
Four random numbers + 08=Reduce by
Income
Four random numbers + 09=Paid/Denied

ite

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.

ate

Coding the BID Practice Coding Your Sample BID

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

CODED BID							
Last Name	First Name	Eligibility	Certification Date				
Coyote	Wiley	123401	10/1/24				
Devil Dusty			9/17/24				
Granger	Hermione	989809					
Lee	Lee Brock		7/15/24				
Potter	Harry	839206	9/3/24				
Weasley	Ron	232301	9/25/24				
Weasley	William		9/25/24				

Coding the BID Practice Coding Your Sample BID

SAMPLE BID								
Last Name	First Name	Benefit Status	Method Documentation	Certification Date				
Coyote	Wiley	Free	Income App	10/1/24				
DeVil	Dusty	Reduced	Income App	9/17/24				
Granger	Hermione	Paid	No docs					
Lee	Brock	Free	DC TANF	7/15/24				
Potter	Harry	Free	Foster App	9/3/24				
Weasley	Ron	Free	DC SNAP	9/25/24				
Weasley	William	Free	DC SNAP - extended	9/25/24				

SLIDE 63

CODED BID

ist Name	First Name	Eligibility	Certification Date
oyote	Wiley	123401	10/1/24
Devil	Dusty	323208	9/17/24
anger	Hermione	989809	
Lee	Brock	321302	7/15/24
otter	Harry	839206	9/3/24
easley	Ron	232301	9/25/24
easley	William	323201	9/25/24

True or False: Every BID must be coded.







True or False: Every BID must be coded.





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

SECTION 5



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.

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.

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.

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.



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.

Technical Assistance

CONTACT US

If you have a question or require additional assistance, please contact your assigned specialist or contact HNS.



602-542-8700



ContactHNS@azed.gov



www.azed.gov/hns





Insert title.

Information to include when documenting this training for Professional Standards:

Training Title: Key Area: 3000 – Administration How to Create a Benefit Learning Code: 3110, 3120 **Issuance Document** 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.

Congratulations

You have completed the Online Course:

Certificate

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



Information to include when documenting this training for Professional Standards:

Training Title: How to Create a Benefit Issuance Document Key Area: 3000 – Administration Learning Code: 3110, 3120 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.




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