How to Submit a Verification Confirmation Review Waiver



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are encouraged to access professional development materials directly from the training library to prevent use of outdated content.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).

Objectives

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

- review the four phases of verification;
- locate other resources available for verification;
- know what the confirmation review is and how to complete it;
- understand when a confirmation review waiver is allowable;
- properly apply for a confirmation review waiver; and,
- identify when the confirmation review waiver has been approved.

TRAINING HOURS

Information to include when documenting this training for Professional Standards:

- **Training Title:** How to Submit a Verification Confirmation Review Waiver
- Key Area: 3000 Administration
- Learning Code: 3110
- Length: 30 minutes





The instruction within this Online Course is based on guidance from USDA's Eligibility Manual For School Meals, 2017. Verification information can be found on pages 97 -118.

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.



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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7-10 11-20 21-28

The following slides will only cover how-to instructions for submitting a confirmation review waiver and provide a brief overview of the verification process. For a comprehensive review of the verification process, refer to ADE's <u>Online Course: Verification Review</u>.

Introduction to Verification





What is Verification?

Verification is the confirmation of eligibility benefits for free and reduced-price meals. The process of verification begins in October and ends in February each year.

Verification is only required when eligibility is determined through the household application process, not through Direct Certification.

Household applications that are subject to verification are: case number applications, foster applications, and free or reduced-price income applications.



Verification Phases

THE FOUR PHASES

There are four phases of verification. These phases are:

- Phase 1: Prepare
- Phase 2: Calculate and Select
- Phase 3: Verify
- Phase 4: Report

PHASE 1: PREPARE In this phase, organize all approved applications

In this phase, determine how many applications will be verified and select the applications using an appropriate sampling method.

PHASE 3: VERIFY

In this phase, conduct direct verification on the selected applications in CNP Direct Verification, and contact the households that were not directly verified.

PHASE 4: REPORT

In this phase, log into ADEConnect to submit the Verification Summary Report in CNP Verification Reporting.

PHASE 2: CALCULATE AND SELECT

Verification Best Practices Calendar

Stay on track with all tasks and deadlines using ADE's Verification Best Practices Calendar!

This calendar outlines action items and resources available for each phase of verification.

VERIFICATION DEST FRAN

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PRE	ARE
🗆 C	omplete/Review the Student Eligibility Checklist and Why the BID is Important.
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t Certification with:	 Household responded, received documentation that changed. Verification is complete when Letter of Verification Results is <u>sent</u> to household. 	*If you need assistance submitting your Verification					
	 Household did not respond - Verification is complete when Letter of Verification Results is 	Summary Report, training will be available virtually in the form					

Nutrition Services Specialist.

This institution is an equal opportunity provider.

Introduction to a Confirmation Review

SECTION 2



Confirmation

Review

A Confirmation Review is when the **Confirming Official** checks if the applications selected for Verification were initially certified correctly. The confirmation review is the first step in Phase 3 of Verification.

A school official who did not make the original eligibility decision (known as the Confirming Official) will review the application and confirm that the correct eligibility was assigned when the application was initially certified.

EXAMPLE

The Bank household application shown below has been selected for verification at random. Julie Smith processed the application on 9/27/23 as reduced-price. In this example, Julie Smith cannot be the Confirming Official because she has signed as the Determining Official.



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Follow-Up Official's Signature:	Date:	

Evaluating the Original Determination

To perform the confirmation review, the Confirming Official will reprocess the application to check the work of the Determining Official and ensure the correct determination was originally made.

• To learn how to process household applications, take ADE's <u>Step-by-Step</u> Instruction: How to Process Household <u>Applications</u>.

EXAMPLE

The household application below lists three people with an income of \$400 a week. It was determined initially as reduced-price. By using the Income Eligibility Guidelines (IEGs), the Confirming Official should find that the application was incorrectly processed and should have been determined as free eligible.





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The examples in this presentation are using IEGs effective SY 23-24. Ensure IEGs for the current SY are being used. The IEGs change annually but the process remains the same.

Changing the Determination

The Confirming Official must sign, date, and check the 'Selected For Verification' box on the selected household applications.

OFFICE USE ONLY	
Eligibility: Free <u>X</u> - ReducedX Denied Determining Official's Signature: <i>Jalie Smith</i>	Date:
Case # Application Foster Application Directly Certified: Date Income Application Homeless/Migrant/Runaway Household Size: <u>3</u> Total Income: <u>8400</u> Per: Week Di-Weekly (Every 2 Weeks)	e of Disregard:
Selected For Verification: Confirming Official's Signature:	<u>Jacobs</u> Date: <u>10/12/23</u>
Follow-Up Official's Signature: Date:	<u> </u>

Once all required confirmation reviews are completed, the SFA will proceed with verification depending on the status change.

Further details on how to proceed with verification is available on page 104 of USDA's Eligibility Manual for School Meals.

FREE TO REDUCED/REDUCED TO FREE

When the status of an application is changed from reduced to free or free to reduced, the application will progress to the next step of verification.

FREE OR REDUCED TO PAID

When the status of an application changes from free or reduced to paid, another application must be selected for verification by the SFA.

INCREASED MEAL BENEFIT

When the status of an application changes to an increased benefit (e.g. from reduced to free), the SFA is required to:

- Make the inc immediately
- Notify the household of the change in benefits
- Verify the application

• Make the increased benefits available

Changing the Determination

EXAMPLE

Since the household application was incorrectly determined, the eligibility and the Benefit Issuance Document (BID) must be updated to the correct eligibility. To update the application, have the Confirming Official make a note of the status change (shown below).

ELIGIBILITY CORRECTED TO FREE BY CONFIRMING OFFICIAL.
Eligibility: Free X Reduced A Denied Determining Official's Signature: Jalie Smith Date: 9/27/23
□Case # Application □Foster Application □Directly Certified: Date of Disregard:
Selected For Verification: Confirming Official's Signature: <u>Mary Jacobs</u> Date: <u>10/12/23</u> Follow-Up Official's Signature: <u>Date:</u>

Next, since in our example the status changed from reduced-price to free, the SFA would be required to:

- immediately
- benefits
- Verify the application

• Make the increased benefits available

- Notify the household of the change in

Reducing Administrative Burden

The number of household applications that are required to be verified each year will be calculated on an individual basis by each SFA.

The verification sample size varies based on each SFAs sampling method and enrollment.

• For example, some SFAs may have very few applications to verify whereas other SFAs may have a larger amount.





Waiving the confirmation review will **not** reduce the administrative burden of verification for SFAs who have a large enrollment.

True or False: The Confirming Official can be anyone in the school food service staff if they are trained on processing household applications.









True or False: The Confirming Official can be anyone in the school food service staff if they are trained on processing household applications.



Anyone in school food service can be the Confirming Official if they are trained on processing household applications <u>except</u> for the individual who made the initial eligibility determination.



True or False: After the confirmation review for all selected household applications is complete, each household application will have the same next steps.









True or False: After the confirmation review for all selected household applications is complete, each household application will have the same next steps.



Depending on the status change of each individual household application, next steps in the verification process will differ. For details, review page 104 of USDA's **Eligibility Manual for School Meals,** 2017.



Confirmation Review Waiver

SECTION 3



CONFIRMATION REVIEW WAIVER

The confirmation review requirement can be waived if the SFA uses a technology-based system with a high level of accuracy in processing an initial eligibility determination. Waiver

To apply for a confirmation review waiver, SFAs must submit a request to their assigned HNS Specialist on school/district letterhead before beginning the verification process.

The request must include:

Requesting a

• the name of the software system the SFA uses to process household applications; • an explanation of how the software demonstrates a high degree of accuracy; • supporting documentation that shows the software's IEGs and Error-Prone Guidelines match USDA's for the current year; and, • a signature from an authorized representative.

Confirmation Review Waiver

SUPPORTING DOCUMENTATION

As mentioned, SFAs submitted a Confirmation Review Waiver Request must submit supporting documentation that shows the software's IEGs and Error-Prone Guidelines match USDA's for the current year.

It is encouraged to include sample applications and eligibility determinations made by the software to demonstrate accuracy.

EDUCATION

National School Lunch Program and School **Breakfast Program - Program Forms and** Resources

n Forms for School Year 2023-2024 have been updated

EMINDER: As per USDA, the Program Forms should be distributed on or around the be chool year. *Forms cannot be distributed before July 1. Application Packet

· Parent Letter for School Meals (English) (Spanish ousehold Application for Free and Reduced-Price Meals (<u>English</u>) (<u>Spanisl</u> ation for Free and Reduced-Price Meals (<u>English</u>) (<u>Spanish</u>) Guardian Consent for Sharing Information (English) (Spanish) ster Outreach Letter - USDA Sample Template (PDF) (Word)

USDA Translated School Meal Application Materia

etters for Special Provision Ontio Parent Letter for Provision 2/3 Non-Base Year & for CEP (English) (Spanis)

nt Letters for the Special Milk Program

 Parent Letter, collects applications and charges (English) (Spanish *Use the instructions and the household application for free and red arent Letter, does not collect applications and charges (English) (Spanish Parent Letter, does not collect applications and does not charge (English) (Spania

on of Benefits Letter, Special Milk (English) (Spanish) tion for Free School Meals Letter, Direct Certification (English) (Spanish d-Price School Meals Letter Direct Certification - Medicaid (English



Current IEGs and Error-Prone Guidelines are available on HNS' NSLP & SBP Forms and Resources webpage.

& Supp	ports	About ADE	ADEConnect	0
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ninistrators and School Loaders

Parents and Families •

HNS/USDA Memo

Submit Data Par

Civil Rights



Child Nutrition Program Error-Prone Guidelines

Effective July 1, 2023 - June 30, 2024

The following are the error-prone guidelines to be used by child nutrition program operators when whether an income application is error-prone.

	We	okty	Bi-Weekly		2x Month		Mon	thly	Annually		
hold e	Max Amount	Min Amount	Max Amount	Min Amount	Max Amount	Min Amount	Max Amount	Min Amount	Max Amount	Min Amoun	
	341.93	to 365	682.85	to 729	740 t	o 790	1,480 1	o 1,580	17,754	to 18,954	
	469.93	3 to 493	939.85	to 986	1,019 1	0 1,069	2,037 1	0 2,137	24,436	to 25,636	
	598.93	3 to 622	1,196.85	to 1,243	1,297 1	o 1,347	2,594 1	o 2,694	31,118	10 32,318	
	726.93	to 750	1,453.85	to 1,500	1,575 t	o 1,625	3,150 t	0 3,250	37,800	to 39,000	
	855.93	3 to 879	1,710.85	to 1,757	1,854 0	o 1,904					
	983.93	to 1,007	1,967.85	to 2,014	2,132 1	0 2,182					
_	1.12.12.12.12.1	100 C 102 C 10	112122	1	200000		+ -				

Income Eligibility Guidelines

Effect	tive Ju	ly 1	, 2023 – .	June 3	0, 202
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Min	The following are the income guidelines to be used by child nutrition program operators when processing mea
nount	benefit income eliability forms using reported income.
124	Effective July 1, 2023 – June 30, 2024

2 678.93 to 702 1,357.85 to 1,404 1,471 to 1,521 3 861.93 to 885 1,722.85 to 1,769 1,867 to 1,917 4 1,044.93 to 1,068 2,088.85 to 2,135 2,263 to 2,313 5 2,263 to 2,130 2,264.85 to 2,100 2,069.85 to 2,135	
3 861.93 to 885 1,722.85 to 1,769 1,867 to 1,917 4 1,044.93 to 1,068 2,088.85 to 2,135 2,263 to 2,313 5 1,022.73 to 1,261 2,864.85 to 2,135 2,263 to 2,313	1
4 1,044.93 to 1,068 2,088.85 to 2,135 2,263 to 2,313	
5 1 222 02 In 1 255 2 454 05 In 2 501 2 656 In 2 700]
5 1,227.93 (0 1,231 2,434.03 (0 2,301 2,039 (0 2,109]
6 1,410.93 to 1,434 2,820.85 to 2,867 3,055 to 3,105	Have
7 1,592.93 to 1,616 3,185.85 to 3,232 3,452 to 3,502	S
8 1,775.93 to 1,799 3,551.85 to 3,598 3,848 to 3,898	

Bi-Weekly 2x Month

Weekly

lousehold Size*	Free	Reduced	Free	Reduced	Free	Reduced	Free	Reduced	Free	Reduced	
1	\$365	\$519	\$729	\$1,038	\$790	\$1,124	\$1,580	\$2,248	\$18,954	\$26,973	
2	\$493	\$702	\$986	\$1,404	\$1,069	\$1,521	\$2,137	\$3,041	\$25,636	\$36,482	
3	\$622	\$885	\$1,243	\$1,769	\$1,347	\$1,917	\$2,694	\$3,833	\$32,318	\$45,991	
4	\$750	\$1,068	\$1,500	\$2,135	\$1,625	\$2,313	\$3,250	\$4,625	\$39,000	\$55,500	
5	\$879	\$1,251	\$1,757	\$2,501	\$1,904	\$2,709	\$3,807	\$5,418	\$45,682	\$65,009	
6	\$1,007	\$1,434	\$2,014	\$2,867	\$2,182	\$3,105	\$4,364	\$6,210	\$52,364	\$74,518	
7	\$1,136	\$1,616	\$2,271	\$3,232	\$2,461	\$3,502	\$4,921	\$7,003	\$59,046	\$84,027	
8	\$1,264	\$1,799	\$2,528	\$3,598	\$2,739	\$3,898	\$5,478	\$7,795	\$65,728	\$93,536	
Additional embers, add:	\$129	\$183	\$257	\$366	\$279	\$397	\$557	\$793	\$6,682	\$9,509	

Annual Income Conversion for Multiple Reported Incomes

come or multiple incomes with the same frequency, do not con-

come. Total Income: \$10,400 + \$36,000 = \$46,400

old's size of four. The

Confirmation Review Waiver Approval

The assigned HNS Specialist will review the waiver request and supporting documentation while providing technical assistance to the SFA if needed.

If all documentation is acceptable, the waiver will be approved and the SFA will be sent a Confirmation Review Waiver Approval Letter via email from ADE. This letter must be kept on file for a minimum of five years.





Once approved, the Confirmation Review Waiver only applies to the year of approval. SFAs are required to submit a confirmation review waiver request each year they wish the confirmation review to be waived.

True or False: SFAs can only request a confirmation review waiver if they use a technology-based system with a high level of accuracy in processing an initial eligibility determination.









True or False: SFAs can only request a confirmation review waiver if they use a technology-based system with a high level of accuracy in processing an initial eligibility determination.



Technology-based systems used by the SFA to process household applications are the only form of processing household applications that is eligible for the confirmation review waiver. SFAs must be able to provide ADE with all documentation required for the waiver and be able to demonstrate the software system being used demonstrates a high level of accuracy.



How often are SFAs required to request a confirmation review waiver?

- A Each year a different software system is being used.
- **B** Annually.
- **C** Every other year.
- **D** Only once.





How often are SFAs required to request a confirmation review waiver?

A Each year a different software system is being	Th
used.	m
	ea
B Annually.	CO
	P١
C Every other year.	SF
	av
D Only once.	re
	th

The confirmation review waiver must be requested annually by each SFA that wishes to have the confirmation review waived for that PY's verification. It is expected that SFAs who conduct verification are aware of the confirmation review requirement and should request this waiver prior to the start of verification each year.



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





Congratulations

You have completed the Online Course: How to Submit a Verification Confirmation Review Waiver.

Information to include when documenting this training for Professional Standards:

Training Title: How to Submit a Verification Confirmation Review Waiver

Please note, attendees must document the amount of training hours indicated on the training despite the amount of time it takes to complete it.

Key Area: 3000 – Administration Learning Code: 3110 Length: 0.5 hour

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 Submit a Verification Confirmation Review Waiver

Key Area: 3000 – Administration Learning Code: 3110 Length: 0.5 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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