

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are encouraged to access professional development materials directly from the training library to prevent use of outdated content.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

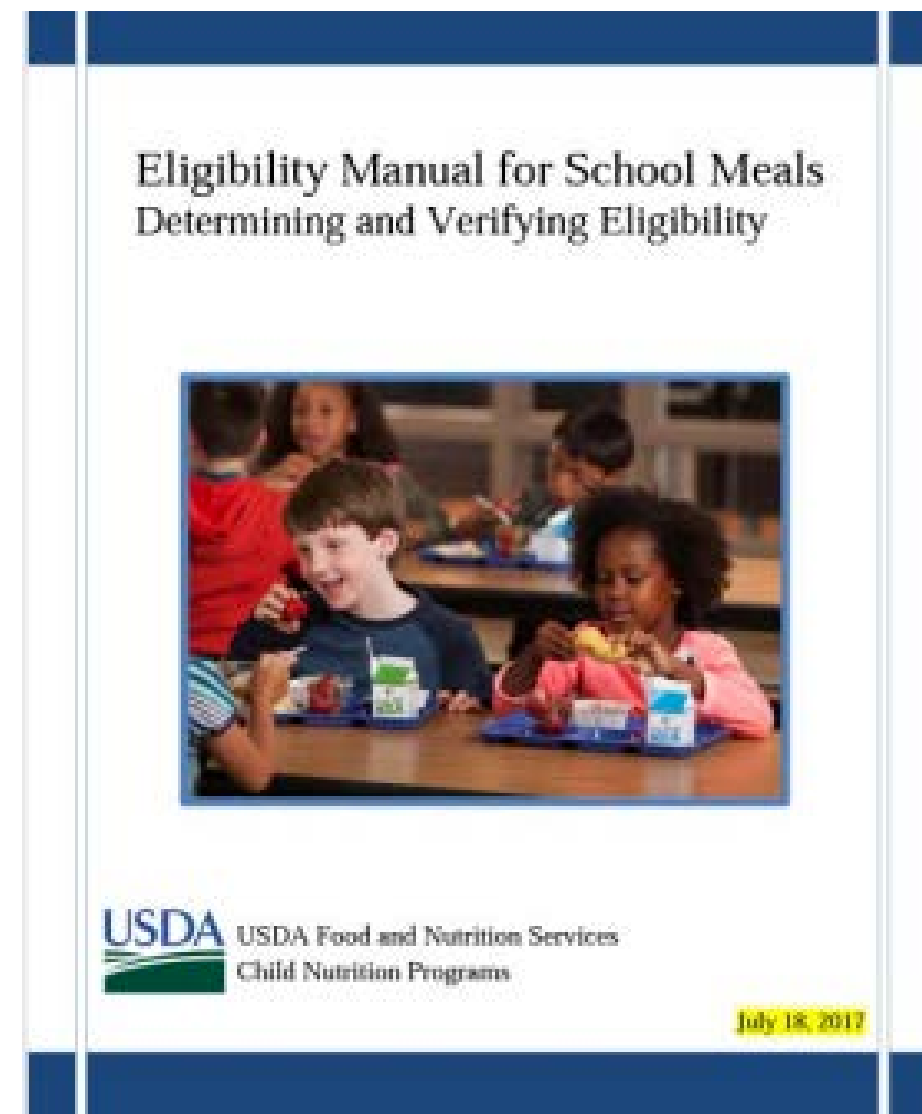
Information to include when documenting this training for Professional Standards:

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.

[Click here](#) to access the manual.

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.

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

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

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

SAMPLE 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		
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

All eligibility determinations should be recorded on a BID.

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

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

SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
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:

- first and last name of the student,
- meal benefit status,
- method used to determine benefits (application, direct certification, etc.),
- and date eligibility was determined.
 - This would be the date the application was processed by the determining official, when CNP Direct Certification was conducted, or when the agency/liaison list was received.

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

SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
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

HOW TO READ

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

For example,

- Dusty DeVil has reduced-price meal benefits due to an income application.
- The application was certified on 9/17/24.

SAMPLE 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		
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

HOW TO READ

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	8/7/24
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

HOW TO READ

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 8/15/24.

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**.

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

[Sample BID](#)

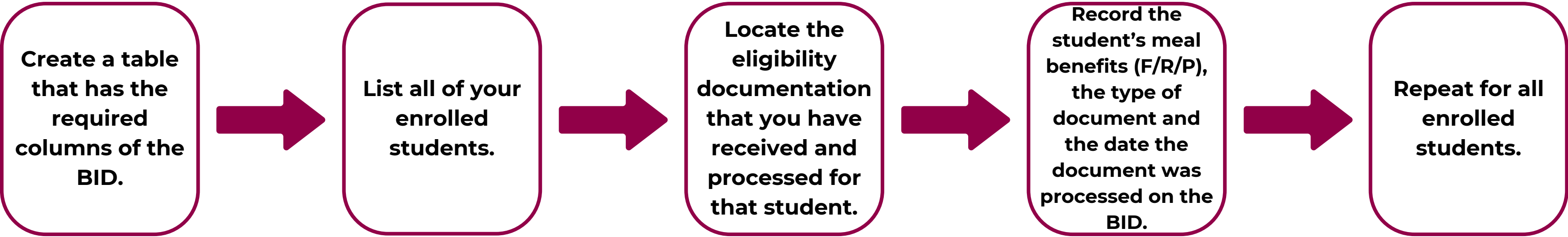
ENROLLMENT EXAMPLE		
First Name	Last Name	School Name
Wiley	Coyote	Dry Desert High
Dusty	DeVil	Dry Desert High
Hermione	Granger	Dry Desert High
Brock	Lee	Dry Desert High
Harry	Potter	Dry Desert High
Ron	Weasley	Dry Desert High
William	Weasley	Dry Desert High

[Enrollment List Example](#)

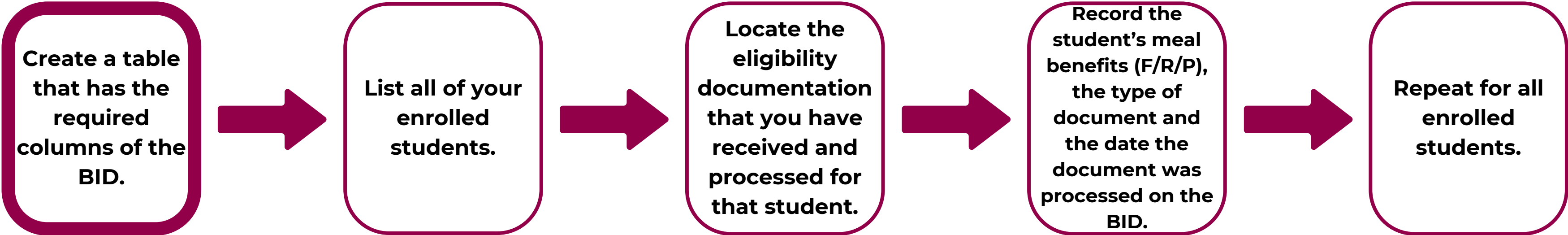
Creating the BID



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



- 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.

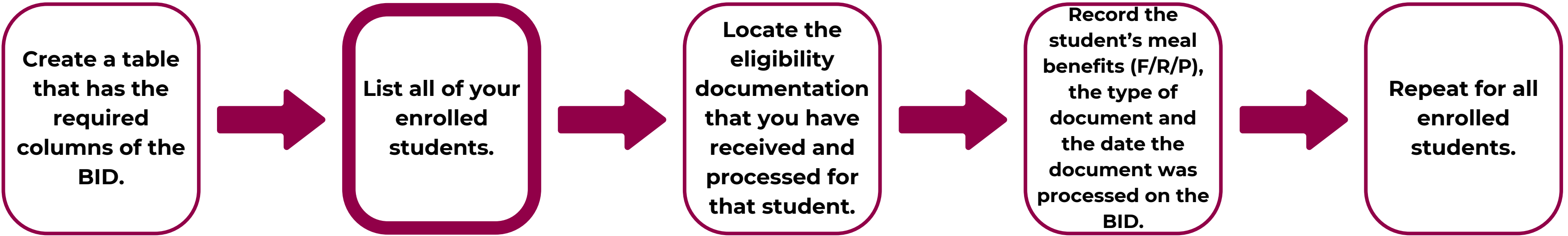


SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date

Creating the BID

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

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

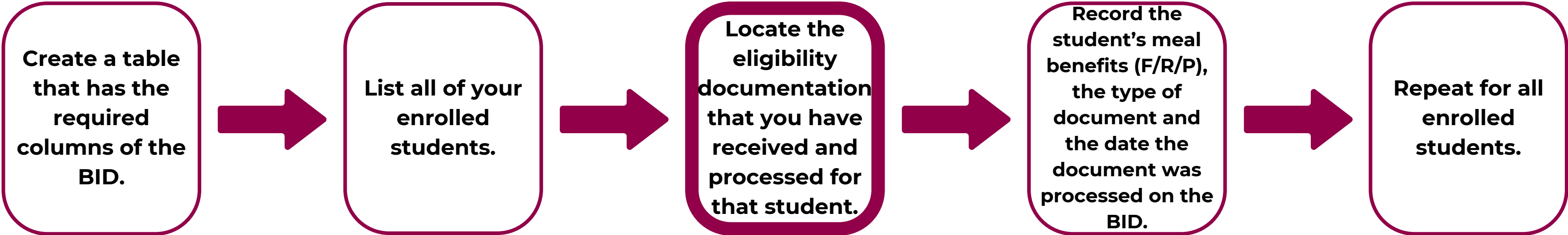


SAMPLE BID				
Last Name	First Name		Method Documentation	Certification Date
Coyote	Wiley			
DeVil	Dusty			
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

Creating the BID

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

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



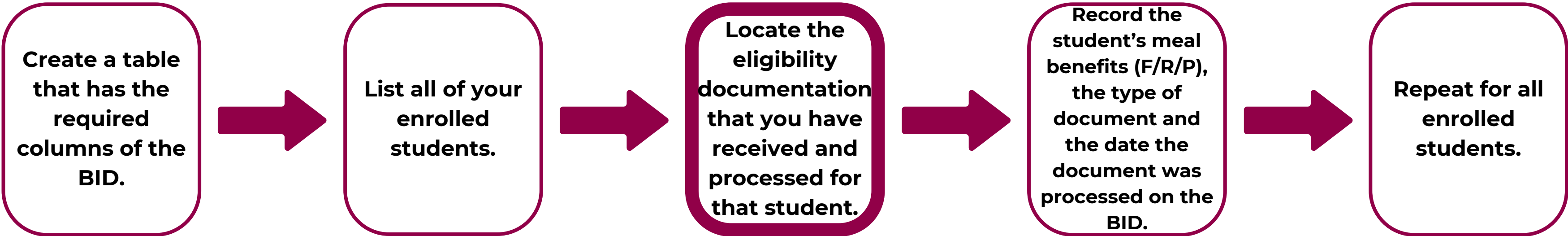
SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid		
Lee	Brock	Free	DC TANF	8/15/24
Potter	Harry	Free	Foster Application	9/3/24
Weasley	Ron	Free	DC SNAP	7/17/24
Weasley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

Creating the BID

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

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

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



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

☐ Error Prone

Eligibility: Free ☒ Reduced ☐ Denied ☐

Determining Official's Signature: Jonah Hill Date: 8/7/24

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

☐ Income Application ☐ Homeless/Migrant/Runaway

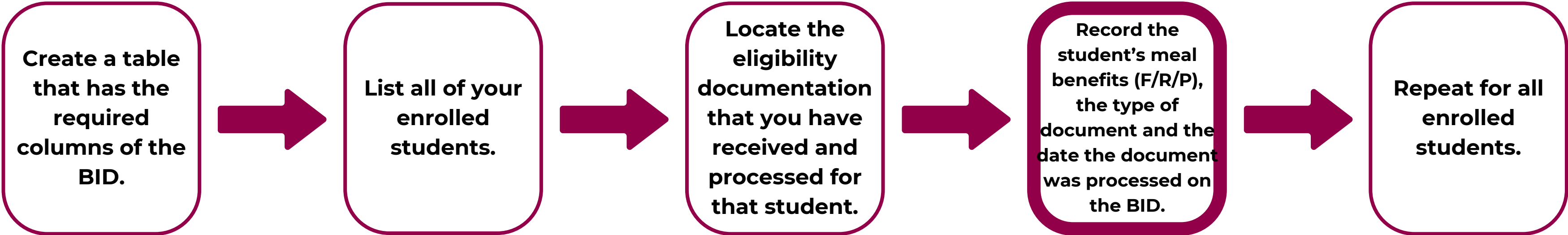
Household Size: 4

Total Income: 2,000 Per: ☐ Week ☐ Bi-Weekly (Every 2 Weeks) ☐ 2x Month ☒ Monthly ☐ Annual

☐ Selected For Verification: Confirming Official's Signature: _____ Date: _____

Follow-Up Official's Signature: _____ Date: _____

Section of the household application that must be filled out by SFA.

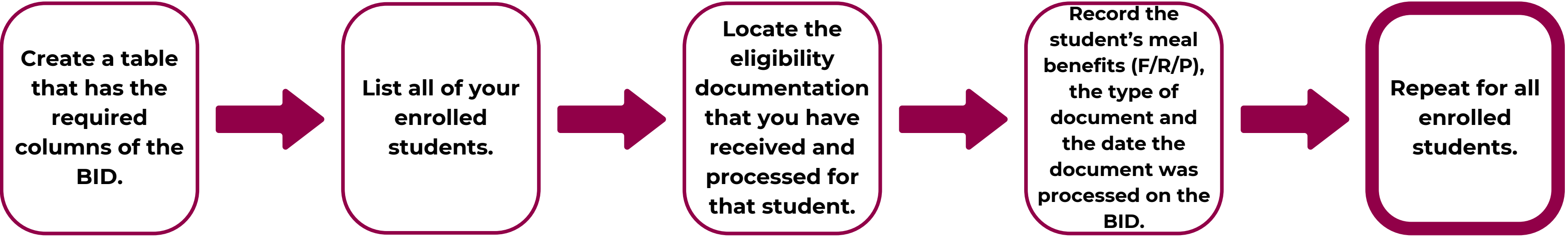


SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty			
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

Creating the 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 (8/7/24).



SAMPLE BID				
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			

Creating the BID

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

Now, we will enter information for Dusty DeVil.



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

☐ Error Prone

Eligibility: Free___ Reduced☒ Denied___

Determining Official's Signature: Jonah Hill Date: 9/17/24

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

☐ Income Application ☐ Homeless/Migrant/Runaway

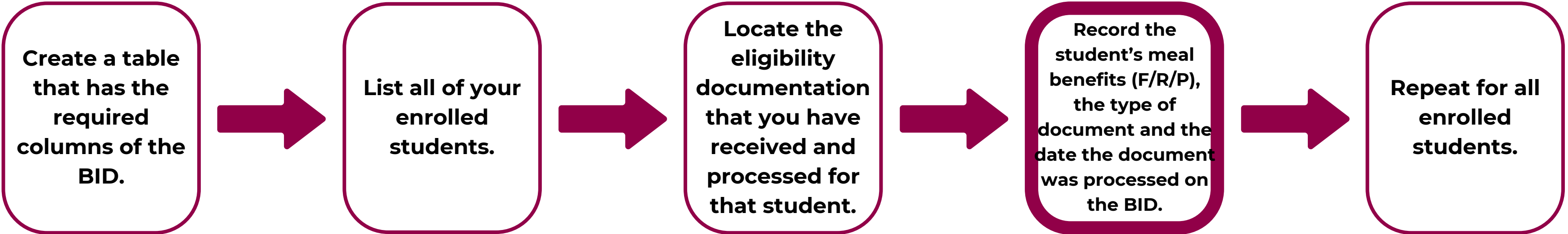
Household Size: 3

Total Income: 600 Per: ☒ Week ☐ Bi-Weekly (Every 2 Weeks) ☐ 2x Month ☐ Monthly ☐ Annual

☐ Selected For Verification: Confirming Official's Signature: _____ Date: _____

Follow-Up Official's Signature: _____ Date: _____

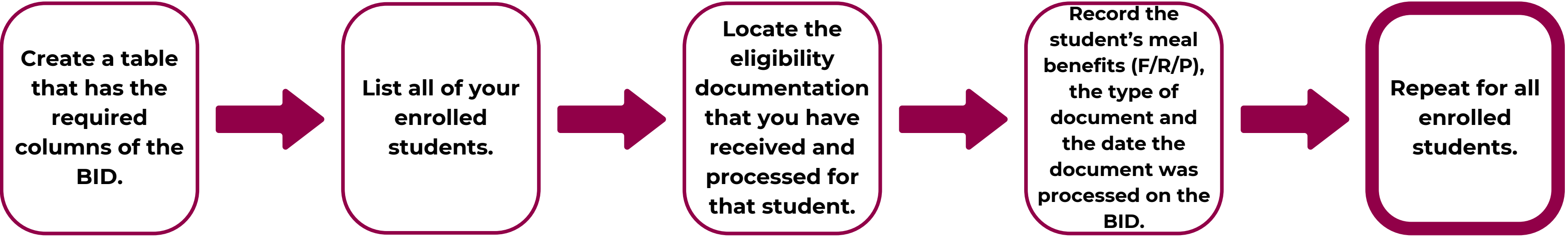
Section of the household application that must be filled out by SFA.



SAMPLE 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			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

Creating the BID

- Record the information in the row for Dusty DeVil
- Under **Benefit Status**, record free.
 - Under **Method/Documentation**, record Income Application.
 - Under **Certification Date**, record the date the application was processed (9/17/24).

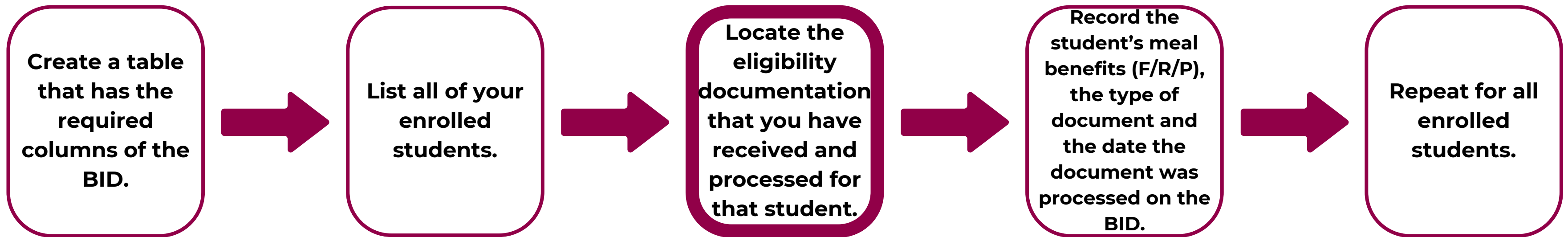


SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione			
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

Creating the BID

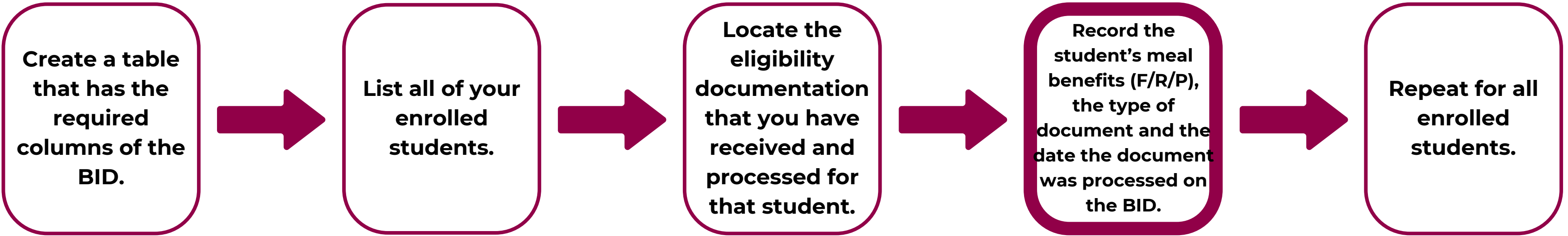
All of the required information for Dusty DeVil has been entered into the BID.

Now, we will enter information for Hermione Granger.



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.

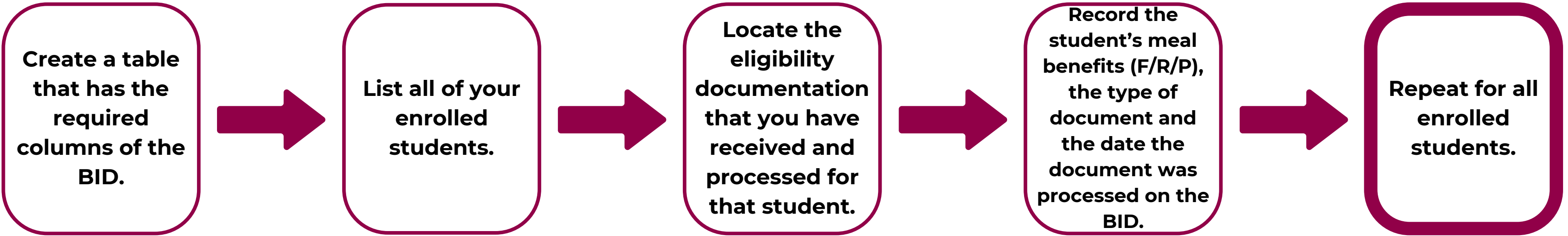


SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No docs	
Lee	Brock			
Potter	Harry			
Weasley	Ron			
Weasley	William			

Creating the 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 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			

Creating the BID

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

Now, we will enter information for Brock Lee.



Brock Lee

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

Result: All

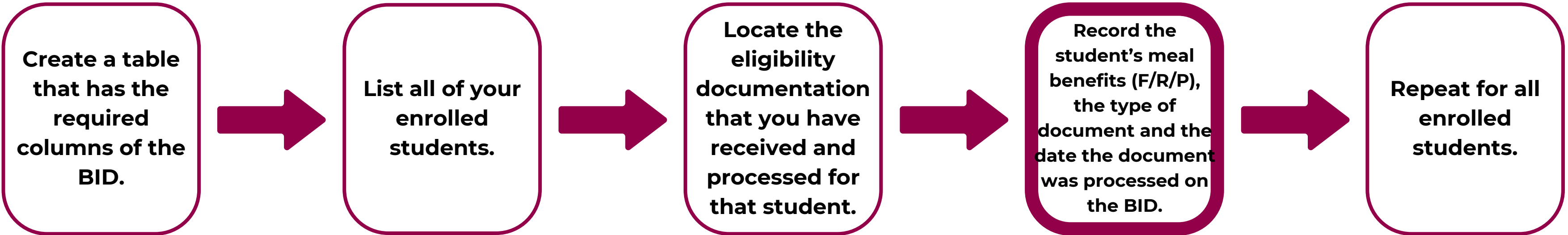
Showing 10 entries

Search:

First Name	Last Name	Birth Date	Result	Result Date	Decision Date	Eligibility Type	Possible Duplicate
Brock	Lee	02/02/2008	Match	7/15/2024		TANF	

Showing 1 to 1 of 1 entries

Previous1Next

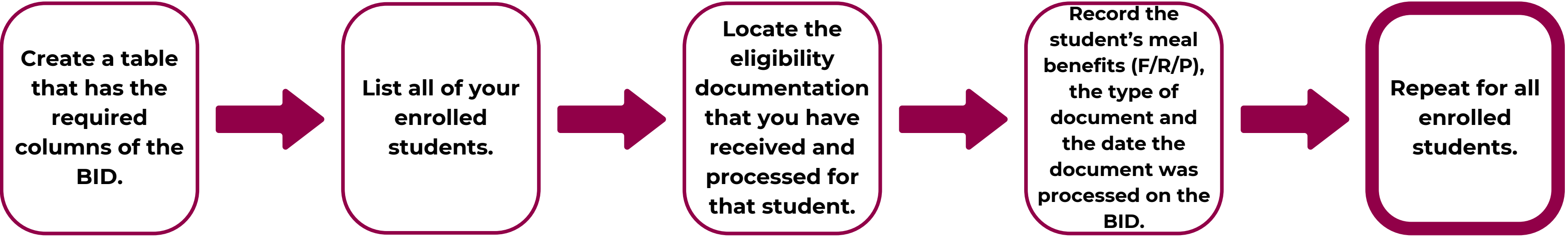


SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No docs	
Lee	Brock	Free	DC TANF	7/15/24
Potter	Harry			
Weasley	Ron			
Weasley	William			

Creating the BID

Record the information in 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 (7/15/24).



SAMPLE 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			
Weasley	Ron			
Weasley	William			

Creating the BID

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

Now, we will enter information for Harry Potter.



Dusty DeVil

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

OFFICE USE ONLY

☐ Error Prone

Eligibility: Free___ Reduced☒ Denied___

Determining Official's Signature: Jonah Hill Date: 9/3/24

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

☐ Income Application ☐ Homeless/Migrant/Runaway

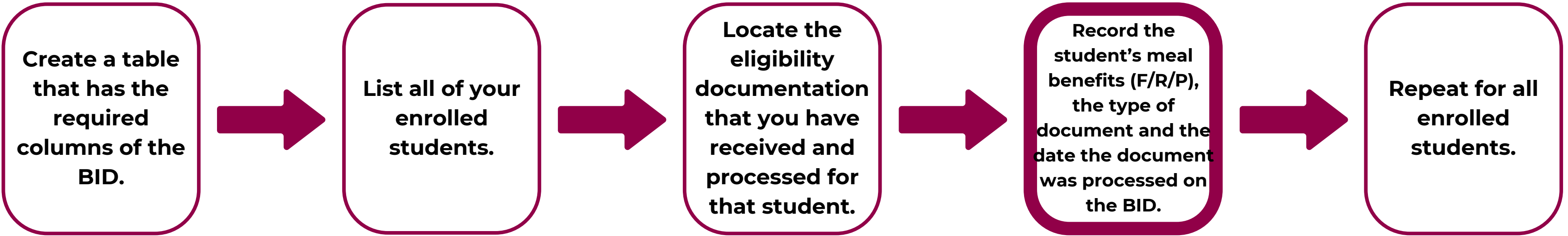
Household Size: _____

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

☐ Selected For Verification: Confirming Official's Signature: _____ Date: _____

Follow-Up Official's Signature: _____ Date: _____

Section of the household application that must be filled out by SFA.

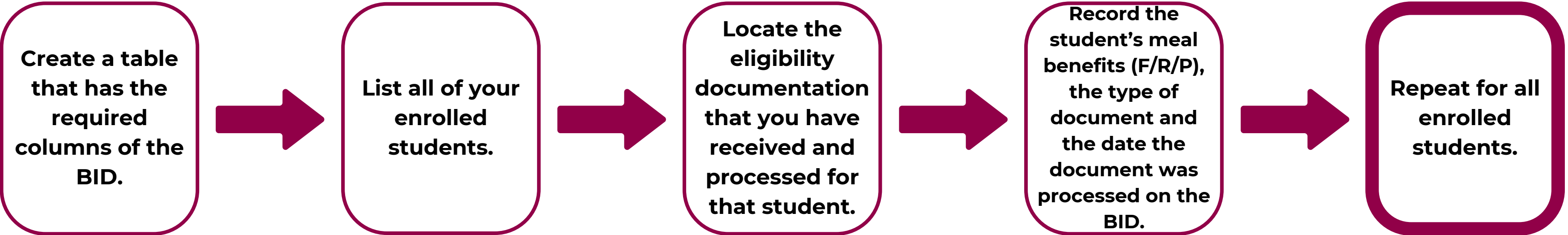


SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No docs	
Lee	Brock	Free	DC TANF	7/15/24
Potter	Harry	Free	Foster Application	9/3/24
Weasley	Ron			
Weasley	William			

Creating the 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 (9/3/24).



SAMPLE 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			

Creating the BID

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

Now, we will enter information for Ron Weasley.



Ron Weasley

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

Result:

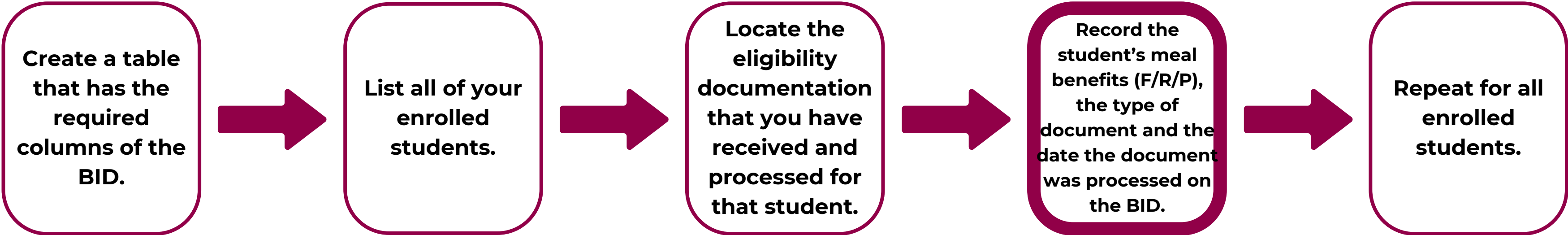
All

Showing 1 to 1 of 1 entries

First Name	Last Name	Birth Date	Result	Result Date	Decision Date	Eligibility Type	Possible Duplicate
Ron	Weasley	06/22/2005	Match	9/25/24		SNAP, TANF	

Showing 1 to 1 of 1 entries

Previous1Next

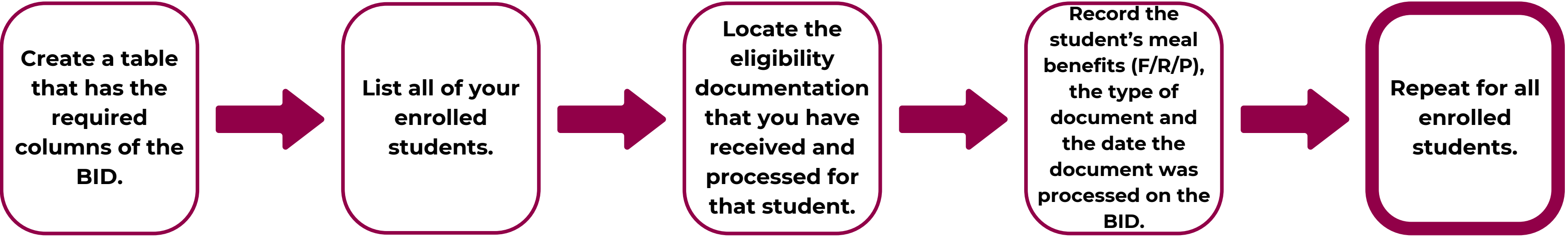


SAMPLE BID				
Last Name	First Name	Benefit Status	Method Documentation	Certification Date
Coyote	Wiley	Free	Income App	8/7/24
DeVil	Dusty	Reduced	Income App	9/17/24
Granger	Hermione	Paid	No docs	
Lee	Brock	Free	DC TANF	7/15/24
Potter	Harry	Free	Foster App	9/3/24
Weasley	Ron	Free	DC Snap	9/25/24
Weasley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

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. 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 (9/25/24).



SAMPLE 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			

Creating the BID

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

Now, we will enter information for William Weasley.



William Weasley

- On file, there is a printed CNP Direct Certification match result that was run on 9/25/24. William is a No Match; however, Ron Weasley resides in the same household as William and is matched in SNAP and TANF. SNAP or TANF matches extend benefits to all household members; therefore, William is also free.

Result:

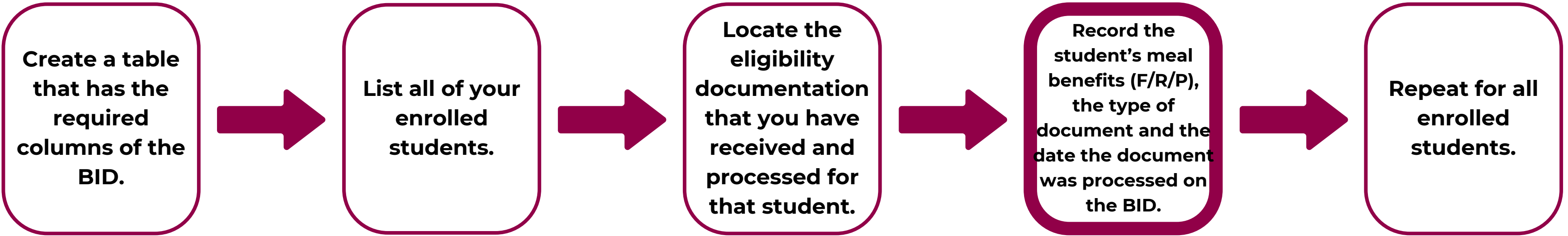
All

Showing 1 to 1 of 1 entries

First Name	Last Name	Birth Date	Result	Result Date	Decision Date	Eligibility Type	Possible Duplicate
William	Weasley	06/22/2005	No Match	9/25/24			

Showing 1 to 1 of 1 entries

Previous1Next



SAMPLE 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	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 (9/25/24).

Quiz Time

Which of the following is not required on the BID?

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



Quiz Time

Which of the following is not required on the BID?

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

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



Quiz Time

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

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



Quiz Time

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

A Paid, no documentation

B Free, DC SNAP-Extended

C Reduced-price, DC SNAP-Extended

D Unsure, It would depend on additional information from the household

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



Quiz Time

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.

2023-2024 Application for Free and Reduced-Price School Meals
Complete one application per household. Please use a pen (not a pencil).

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

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

Child's First Name	MI	Child's Last Name	School Name	Foster Care	Homeless, Migrant, Runaway
Suzy		Smith		☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐

STEP 2 Do any Household Members (including you) currently participate in one or more of the following assistance programs: SNAP, TANF, or FDPIR? Circle one: Yes / No

If you answered NO > Complete STEP 3. If you answered YES > Write a case number here then go to STEP 4 (Do not complete STEP 3) Case Number: _____

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

Are you unsure what income to include here? Flip to the back of this application and review the charts titled "Sources of Income" for more information. The "Sources of Income for Children" chart will help you with the Child Income Section. The "Sources of Income for Adults" chart will help you with the Adult Household Members Income Section.

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

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

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

Name of Adult Household Members (First and Last)	GROSS Earnings from Work	How often?	Public Assistance/Child Support/Alimony	How often?	Pension/Retirement/All Other Income	How often?
	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐
	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐
	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐
	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐

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

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

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

Signature of adult completing the form: Jim Carrey Today's date: 07/29/24

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

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

OFFICE USE ONLY

Eligibility: Free ☒ Reduced ☐ Denied ☐ Error Prone ☐

Determining Official's Signature: Jonah Hill Date: 8/5/24

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

☐ Income Application ☐ Homeless/Migrant/Runaway

Household Size: _____ Total Income: _____ Per: ☐ Week ☐ Bi-Weekly (Every 2 Weeks) ☐ 2x Month ☐ Monthly ☐ Annual

☐ Selected For Verification: Confirming Official's Signature: _____ Date: _____

Follow-Up Official's Signature: _____ Date: _____

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.

2023-2024 Application for Free and Reduced-Price School Meals
Complete one application per household. Please use a pen (not a pencil).

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

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

Child's First Name	MI	Child's Last Name	School Name	Foster Care?	Homeless, Migrant, Runaway?
Suzy		Smith		☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐
				☐	☐

STEP 2 Do any Household Members (including you) currently participate in one or more of the following assistance programs: SNAP, TANF, or FDPIR? Circle one: Yes / No

If you answered NO > Complete STEP 3. If you answered YES > Write a case number here then go to STEP 4 (Do not complete STEP 3) Case Number: _____

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

Are you unsure what income to include here? Flip to the back of this application and review the charts titled "Sources of Income" for more information. The "Sources of Income for Children" chart will help you with the Child Income Section. The "Sources of Income for Adults" chart will help you with the Adult Household Members Income Section.

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

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

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

Name of Adult Household Members (First and Last)	GROSS Earnings from Work	How often?	Public Assistance/Child Support/Alimony	How often?	Pension/Retirement/All Other Income	How often?
	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐
	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐
	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐
	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐	\$ _____	Weekly ☐ Bi-Weekly ☐ 2x Month ☐ Monthly ☐

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

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

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

Signature of adult completing the form: *Jim Carrey* Today's date: 07/29/24

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

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

OFFICE USE ONLY

Eligibility: Free ☒ Reduced ☐ Denied ☐ *Jonah Hill* ☐ Error Prone

Determining Official's Signature: _____ Date: 8/5/24

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

☐ Income Application ☐ Homeless/Migrant/Runaway

Household Size: _____ Total Income: _____ Per: ☐ Week ☐ Bi-Weekly (Every 2 Weeks) ☐ 2x Month ☐ Monthly ☐ Annual

☐ Selected For Verification: Confirming Official's Signature: _____ Date: _____

Follow-Up Official's Signature: _____ Date: _____

Quiz Time

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

Last Name	First Name	School Name	Benefit Status	Certification Date
Flinstone	Fred	Desert High School	Free	8/7/24

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



Quiz Time

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

Last Name	First Name	School Name	Benefit Status	Certification Date
Flinstone	Fred	Desert High School	Free	8/7/24

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

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 increased their meal benefits or if the new category can extend benefits to household members. It is recommended to reference this diagram when determining if it is necessary to update a meal benefit status or method/documentation on the BID.



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

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

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						SAMPLE 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	Certification Date
Lee	Brock	Free	Income Application	9/1/23

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

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 Date
Weasley	William	Free	DC SNAP	9/5/24



Last Name	First Name	Eligibility	Certification Date
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 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=Reduce by Income
- Four random numbers + 09=Paid/Denied

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

Coding the BID

Practice Coding Your Sample BID

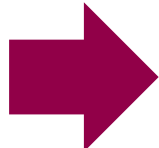
On the back side of your handout, **Sample BID** is a table titled **Coded BID**. Complete the missing eligibility codes for Dusty DeVil and William Weasley, which are highlighted in red. When completed click on the next slide for the correct answers.

CODED BID			
Last Name	First Name	Eligibility	Certification Date
Coyote	Wiley	123401	10/1/24
Devil	Dusty		9/17/24
Granger	Hermione	989809	
Lee	Brock	321302	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



CODED BID			
Last Name	First Name	Eligibility	Certification Date
Coyote	Wiley	123401	10/1/24
Devil	Dusty	323208	9/17/24
Granger	Hermione	989809	
Lee	Brock	321302	7/15/24
Potter	Harry	839206	9/3/24
Weasley	Ron	232301	9/25/24
Weasley	William	323201	9/25/24

Quiz Time

True or False: Every BID must be coded.

A True

B False



Quiz Time

True or False: Every BID must be coded.

A True

B False

A BID only needs to be coded if the eligibility status of students is visible at the point of service. If only the school nutrition staff have access to and see the BID, no coding is needed. If students can see the BID, it needs to be coded. It's up to the SFA to decide if the BID should be coded based on how their operation is set up as student eligibility must not be overtly identified.



Questions & Answers

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.

Eligibility Manual for School Meals Determining and Verifying Eligibility



USDA USDA Food and Nutrition Services
Child Nutrition Programs

July 18, 2017

Technical Assistance

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.

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:
Insert title.**

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.

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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Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the state or local agency that administers the program or contact USDA through the Telecommunications Relay Service at 711 (voice and TTY). Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, [AD-3027](#), found online at [How to File a Program Discrimination Complaint](#) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

1. **Mail:** U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Mail Stop 9410, Washington, D.C. 20250-9410;
2. **Fax:** (202) 690-7442; or
3. **Email:** program.intake@usda.gov.

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