



Benefit Issuance

Idaho School Nutrition Reference Guide

OVERVIEW

Benefit issuance is the process of providing school meal benefits to students who are eligible. The process of determining a student's benefits may involve a free and reduced application, direct certification, or categorical eligibility. Maintaining a benefit issuance list is a key component of the benefit issuance process. A school that provides Provision 2 for **both** breakfast and lunch **or** Community Eligibility (CEP) will maintain a list of children enrolled in school, but will not have to maintain a traditional benefits issuance list as explained in this section.

Please refer to the most current Eligibility Manual for School Meals found in MyIdahoCNP under Download Forms, and the Direct Certification and Verification sections of this reference guide for additional details on the process of determining a student's eligibility status and, therefore, what meal benefits they will receive.

TERMINOLOGY

Benefit issuance - Documentation of meal benefit status conveyed to children. A benefit issuance list of all students and their eligibility status must be maintained.

Benefit issuance list - A document (can be electronic, Excel preferred, or handwritten) that lists each student enrolled in a school site and their school meal benefit status- free, reduced, or paid. A benefit issuance list of all students and their eligibility status must be maintained / updated and must document dates when benefits changed. The benefit issuance list shows the source of the student's free meal status (i.e., free because of direct certification (DC), household extended, foster status, household free/reduced income application, or due to being certified as homeless, migrant, or runaway by the designated liaison). This document must be kept confidential. Accurate maintenance of this document is a requirement of the National School Lunch Program and School Breakfast Program.

Categorical eligibility- Those children approved without an application to receive free school meals. A child is categorically eligible for free school meals if they are: on the direct certification State match list, living in a household receiving SNAP (Supplemental Nutrition Assistance Program), FDPIR (Food Distribution Program on Indian Reservations) and/or TAFI (Temporary Assistance for Families in Idaho) benefits, on a signed homeless / migrant / runaway list certified by the appropriate liaison, enrolled in Head Start, or in foster care where the court has the legal responsibility for the child.

Certification/determination- Process used in determining the eligibility status of each student, which includes approving or denying free and reduced applications, matching children on the direct certification list, and using certified lists from the school district's homeless, migrant, runaway liaison.

Direct certification (DC) – A method in which a child is eligible for free meals based on documentation obtained directly from the appropriate State or local agency authorized to certify that the child is a member of a household receiving assistance under SNAP, FDPIR or TAFI programs, and/or is a foster or Head Start child or is certified by the appropriate liaison to be a homeless, migrant, or runaway child.

Free and Reduced Price School Meals Application- Application completed by families and turned into the school district, providing household and income information to determine if the family qualifies for free or reduced price benefits.

Homeless / migrant / runaway list – A list of students from the appropriate school district liaison who are certified to be homeless, migrant, or runaway, and, therefore, qualify to receive free meal benefits. The list(s) must be signed and dated by the designated liaison and retained on file. Homeless, migrant, and runaway status does not convey free meal status to other students in the household.

Overt identification- Any action that may result in a child being recognized as potentially eligible to receive or be certified for free or reduced price school meals or free milk.

Point of service (POS) - The point in the food service operation where a determination can accurately be made that a reimbursable free, reduced price, or paid lunch has been served to an eligible child.

WHAT IS BENEFIT ISSUANCE?

Benefit issuance is the process of providing school meal benefits to students who are eligible. A student's eligibility is determined by a completed free and reduced price meal application from their household, direct certification, or establishing categorical eligibility. The eligibility status of each student enrolled in the school must be documented and updated as appropriate on a master record, known as a benefit issuance list or roster. Schools or districts may have more than one benefit issuance list, as long as there is a complete or master list that includes all of the students. Maintaining an accurate, updated benefit issuance list is a requirement of the NSLP and SBP and the list will be reviewed by the State agency (SA) during an administrative review. The list(s) may be stored electronically or in hard copy depending on the POS system used by the school. The list(s) should be updated as needed, whenever a student is added or whenever a student's status changes to a greater meal benefit and/or becomes categorically eligible (see the Direct Certification section of the Idaho School Nutrition Reference Guide). A student that qualifies for free or reduced meal benefits during the school year is eligible to receive the benefit for the entire school year, unless the household declines the benefit. If the

list is not automated, then the date updated and determining official's signature must be recorded on the printed list(s). The compilation of the benefit issuance list occurs through determination of free and reduced applications, foster status, accessing directly certified lists on the electronic State matching system, communicating with the appropriate agencies/individuals to confirm names of migrant, homeless, runaway, and students enrolled in Head Start, and completing the verification process.

The benefit issuance list must contain the following information (at the minimum):

- Student's first and last name
- Benefit status (free/reduced/paid)
- Method of certification (DC/ application/categorically eligible)
- Date of certification & date of any change in benefit status
- School name
- Total number of eligible/enrolled students in SFA

A benefit issuance list template in Excel is available in MyIdahoCNP under Applications > Download Forms.

For schools utilizing a POS software system, it is recommended that a backup paper copy of the list be kept at the cashier station in case the electronic system goes down.

Remember:

- The benefit issuance list must be updated as changes occur (withdrawals, additions, changes in category). All changes should be dated to reflect when they occurred.
- Student information on the benefit issuance list is highly confidential. The information should not be made available to all school officials. Only those who are directly responsible for the ongoing operation of the nutrition program or responsible for monitoring program compliance should have access.
- The benefit issuance list should **never be faxed or emailed** due to the possibility of the secure information being inadvertently exposed or shared with others. If mailing a list, it must not go by regular mail, but a secure form of mailing. When communicating with the State agency, always upload the benefit issuance list and any other sensitive student data into MyIdahoCNP.
- Schools must ensure, to the maximum extent practicable, that students are not overtly identified as receiving free or reduced priced benefits to their peers and other school staff. Please refer to the Eligibility Manual for additional information on disclosure of student eligibility data to programs and individuals outside the food service operation.

WHY IS BENEFIT ISSUANCE IMPORTANT?

All SFAs participating in the NSLP or SBP must make free and reduced meals available to eligible children and all SFAs participating in the Special Milk Program providing applications must make free milk available to all eligible children. A proper benefit issuance process ensures children in

low income families are able to get the benefits of receiving healthy, nutritious meals at school, providing for the health, wellness, and success of students.

The benefit issuance process and an accurate, updated benefit issuance list are necessary to track the service of free, reduced, and paid price meals. This accurate tracking allows the food service department to maintain accurate claiming counts of how many free, reduced, and paid meals were served, and therefore submit an accurate claim to the SA and receive reimbursement for the meals served.

RESOURCES

Additional resources may be available for this topic. Please check the Idaho School Nutrition Reference Guide website for copies of manuals, user guides and helpful links to relevant subject matter.

For Questions Contact

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