

Addendum Question for Policy Statement for Free and Reduced-Price Meals Attachment B: Meal Count/Collection Procedure(s) (Attachment B)

Effective Date for Eligibility Flexibility Form

CEs should submit this form to take advantage of the flexibility to (1) set the effective date for eligibility as the date the household application was received by the CE or to (2) set the effective date for eligibility for participation in a categorical program as the date recorded on the eligibility documentation, i.e., the date the originating agency or organization recorded as the date information was in effect. **If a CE needs to update other policies for Attachment B, the CE should submit the full Attachment B instead of this addendum form.**

In assigning the effectiveness date for the approval of categorical eligibility, USDA uses the term *direct certification* when a CE determines eligibility without application for the following categorical programs:

- Supplemental Nutrition Assistance Program (SNAP); Temporary Assistance for Needy Families (TANF); Food Distribution Program on Indian Reservations (FDPIR)
- Homeless, including runaways and individuals displaced by declared disasters
- Foster
- Migrant
- Designated state or federal funded pre-kindergarten programs, including Early Head Start, Even Start, and Head Start



Contracting Entity Name



Date



Contracting Entity ID

5A. When the CE certifies or approves eligibility by application, what is the date the eligibility starts, i.e., the effective date for eligibility?

Check one box from the following:

- All sites and all school nutrition programs assign the effective date for eligibility based on household applications as the date the completed application is approved by the Reviewing Official.
- All sites and all school nutrition programs assign the effective date for eligibility based on household applications as the date the completed application is recorded as received by the CE.

Information Box, Question 5A

The second choice is a new option for School Year 2014-2015. If the CE uses this method, the CE must have procedures in place to (1) refund overpayments accrued by students who pay full price for meals from the date the completed application is recorded as received until the date the application is approved; (2) remove accrued debt from student accounts when debt is accrued after a completed application is recorded as received until the completed application is approved; and (3) submit amended claims as appropriate according to TDA procedures for amending claims, including the requirement to amend a claim no later than 60-calendar days after the last day of the claim month.

5B. When the CE certifies or approves eligibility based on participation in a categorical program without household application, what is the date the eligibility starts, i.e., the effective date for eligibility?

Check one box from the following:

- All sites and all school nutrition programs assign the effective date for eligibility based on participation in a categorical program without household application as the date the categorical program participation list is reviewed and approved by the Reviewing Official.
- All sites and all school nutrition programs assign the effective date for eligibility based on participation in a categorical program without household application as the date recorded on the categorical program eligibility documentation, i.e., the date the originating agency or organization recorded as the date the information was in effect.

Information Box, Question 5B

The second choice is a new option for School Year 2014-2015. If the CE uses this method, the CE must have procedures in place to (1) refund overpayments accrued by students who pay full price for meals from the date recorded as the documentation effective date until the documentation is approved; (2) remove accrued debt from student accounts when debt is accrued before the date recorded as the documentation effective date until the documentation is approved; and (3) submit amended claims as appropriate according to TDA procedures for amending claims, including the requirement to amend a claim no later than 60-calendar days after the last day of the claim month.