Income Eligibility Form Evaluation

Overview

Minute Menu allows you to track child Free/Reduced/Paid statuses. You can use the software to print state-specific Income Eligibility Forms (IEFs) (also referred to as Meal Benefit Forms or Household Income Sheets, depending on the state) along with a child enrollment form.   In addition, you can enter household income information to automatically calculate a child's F/R/P reimbursement level.

Tracking Child FRP Info

Each child should be assigned a free/reduced/paid reimbursement level, which is used when claims are processed. (If left unassigned, the child is assumed not to have an application.) There are two functions in Minute Menu that allow you to set the reimbursement level for a child: Manage Child Information and Activate Children.

On the Oversight tab of Manage Child Information function, you can set a child's reimbursement level manually.

The reimbursement level set here for a child will be used throughout the system. It's important not to confuse the Reimbursement Level circled here with the value recorded in the IEF Application calculator (described below).

When no FRP category is selected for a child, the system normally assumes the child is Paid. These "No Application" children can also be disallowed outright, if that is desired. Policy F4 controls this.
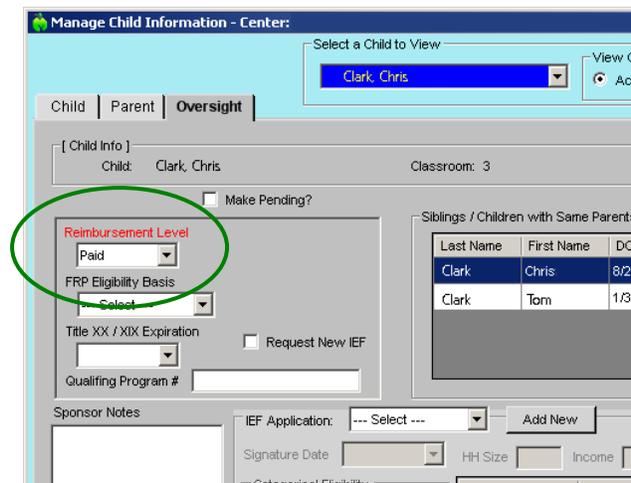
Setting FRP via Activate Children

Different agencies can handle IEFs in different ways. Some have centers manage all aspects of the IEF process. Others require centers to submit paperwork to the sponsor or back office for review. If you operate in the latter situation, you may also use the Activate Children function to activate new enrollments (which will be pending when initially created by a center). You can also designate a child's FRP status when activate children:
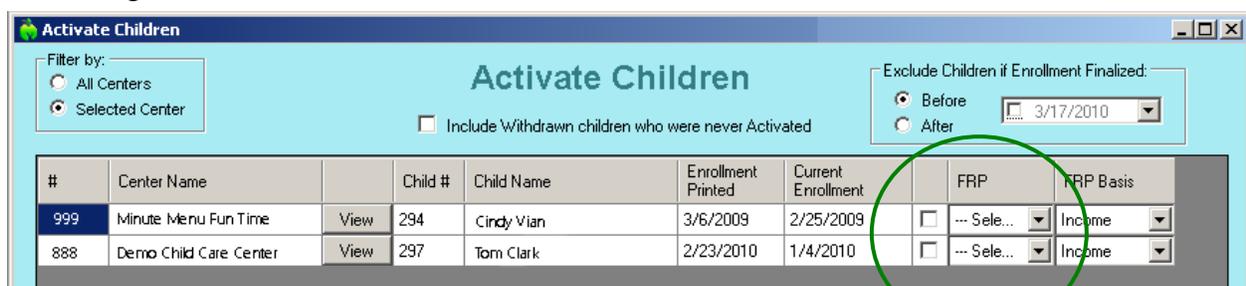
FRP Basis

When classifying a child as free, you can note the underlying reason. They are listed here:
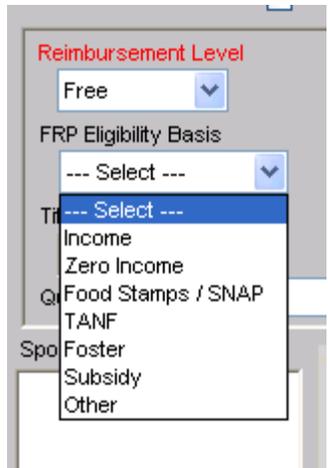
Income,	Actual income numbers received from the parents
Zero Income,	Income is Zero, Kids claimed for FREE for 45 days
Food Stamps/SNAP,	Family receives Food Stamps benefit
TANF,	Family receives TANF benefit
Foster,	This child is a foster child
Subsidy,	voucher program
Other,	eg. homeless kids, FDPIR, etc.

Note on Zero Income forms: When you classify a child as free because there is zero income on the form, state policy is usually such that the child can only be considered free for 45 days from the date of the application (including the full month of the 45th day). You will need to manually change the child's F/R/P Reimbursement Level back to paid after the appropriate time period has passed, unless you have chosen to use IEF expiration dates (described in detail below).

You can document relevant case numbers for categorically eligible children (such as Food Stamp/SNAP case #'s or TANF case #'s) in the Qualifying Program # box.   This isn't required, but it can be useful for reporting purposes.

Title XX/XIX

You only need to supply Title XX/XIX Expiration dates on For Profit centers whose free/reduced level is below 25%. For Profit centers can also qualify if 25% of their enrolled children receive Title XX (subsidy or voucher) funds. Note the expiration date, and the children will be assumed eligible for any month including the expiration date.

This does not affect the claim in any other way, other than to make a For Profit center eligible when it otherwise isn't.

Claim Issues

The Reimbursement Level that you set for each child has a substantial impact when you process a claim in Minute Menu. If you use a blended rate method, see the **Process Claims & Calculating Rates** help document for details. See also the **Minute Menu CX Claim Errors** list, paying special attention to errors 53 and 62.

Using IEF Expiration Dates

Enrollments and Income Eligibility forms, when received, are valid for one year. Each time you print a child enrollment form in Minute Menu, the system will print both an enrollment form and the income eligibility form, together. As a result, most agencies track only one enrollment period per child. This is recorded in Manage Child Information on the Child tab in the Enrollment Info section:

The specific rules governing when an enrollment form will expire are highly customizable, and are controlled via Administration >> Manage Policies, policies D01a – D01d. Generally speaking, forms are good from a year from the current enrollment form date, or good until a fixed expiration/renewal date (like September 30 of each year).

If you track income eligibility forms and enrollment forms together, the enrollment expiration date is the same thing as the income eligibility expiration date for your agency, and you can ignore the rest of this section.

However, some agencies find it necessary to track income eligibility forms independent of enrollment forms. So, an enrollment form might be received on Mar 15, 2009 and be good thru Mar 31, 2010, but an income eligibility form might not be signed until April 10, 2009, and be good only until June 30, 2009.

If you require different periods for IEFs and enrollment forms, then you'll need to enable the use of IEF expiration dates in Minute Menu. To enable IEF expiration dates, go to Administration >> Manage Policies and set policy F8. You can control the specific IEF expiration date behavior (in terms of when forms are set to expire) via policies F8b-F8e.

If you choose to track IEF expiration dates for each child, you'll see the IEF Expiration area on the Oversight tab of Manage Child Information:

IEF Expiration Date Impact

When you use distinct IEF expiration dates, a child who is classified as Free will actually be classified for claiming purposes as Paid once the expiration date has passed. A child can only have one FRP eligibility type in a given month, so the Free status will remain until the end of the month within which the IEF expires, and effective the following month, the child will be treated as Paid (unless the date is extended because you receive a new form).

NOTE: currently (effective version 1.0.0.146), the software treats a child as paid the same month the IEF expires, rather than starting the following month. This behavior will be changed soon to include the entire month of expiration.

Child Roster

IEF Expiration dates, if used, will be displayed on the child roster.

Name	Class /#	Age	DOB	Enrolled	Expires	Status	FRP Qual	Race	Withdrawn
1. Boston, Jennifer	2	1y 1m	1/15/20	2/10/10	3/18/25	FREE	Income	WHITE	
2. Carrillo Padron,Roberto	3	2y 3m	1/15/20	2/10/10	3/18/25	PAID	Title XX	WHITE	
3. Clark, Christine	5	3y 4m	1/15/20	2/10/10	3/18/25	FREE	Income	WHITE	
4. Clark, Wendy	2	4y 5m	1/15/20	2/10/10	3/18/25	FREE	Income	BLACK	
5. Clark,Natalie K	1	5y 6m	1/15/20	2/10/10	3/18/25	FREE	Income	HISPANIC	
6. Clark,Thomas W	6	6y 7m	1/15/20	2/10/10	3/18/25	FREE	Foster	HISPANIC	1/2/24
7. Cooper,Mia	3	1y 1m	1/15/20	2/10/10	3/18/25	PAID	Title XX	WHITE	
8. Daleiden,Samantha Kay	6	2y 3m	1/15/20	2/10/10	3/18/25	FREE		WHITE	
9. Davis,Catherine D	1	3y 4m	1/15/20	2/10/10	3/18/25	PAID	Income	WHITE	
10. Evans,David	6	4y 5m	1/15/20	2/10/10	3/18/25	FREE	Title XX	WHITE	
11. Gardner,Elizabeth A	5	5y 6m	1/15/20	2/10/10	3/18/25	FREE	Income	WHITE	
12. Hamilton,Dawn	2	6y 7m	1/15/20	2/10/10	3/18/25	FREE	Income	BLACK	2/7/23
13. Hanish,Joseph	3	1y 1m	1/15/20	2/10/10	3/18/25	FREE	Income	HISPANIC	
14. Hudson,Richard	5	2y 3m	1/15/20	2/10/10	3/18/25	PAID	Foster	HISPANIC	

Note the IEF Exp column that is now visible. Also look specifically at the child: Lucas Kroll. The child's IEF has expired; previously, the child was Free. So the child's IEF is noted with *F. But the FRP level of the child for the month is Paid, because the child is expired.

When processing claims, expired IEFs will be noted with error #69 on the OER.

Using the IEF Application Calculator

Minute Menu has a built-in tool that can be used to enter a single Income Eligibility Form and determine the reimbursement level of the child. This tool is located on the Oversight tab of the Manage Child Information function.

Each time you have an IEF filled out by a parent, you can enter the information from that IEF into this calculator, and the Minute Menu will tell you whether the child is free, reduced, or paid.

To add a new application, click [Add New].

The IEF calculator has been designed specifically to match the information reported by parents when filling out Income Eligibility Forms (or Meal Benefits Forms, or Household Income Sheets, or whatever the term for the form is in your state). So you'll generally type onto the calculator what you see on the form. Here are some specific instructions:

- The Signature Date should match the signature date of the form. This date controls the poverty rates used when evaluating the form. So, for example, a signature date of 6/30/2009 will use one set of rates and 7/1/2009 will use the new year's rates.
- HH Size and Income are computed automatically based on what you type into the HH Member grid. However, it's not necessary to fill in the HH Member grid if you don't want to. For example, if you see 2 people listed on the IEF form, only one has income, you can simply type in 2 in HH Size and the income of that person. But if there are several with different incomes and different payment frequencies, feel free to type that info in the grid and the HH Size & Income fields will fill in automatically.
- For children who have a categorical eligibility (like TANF, Food Stamps/SNAP, etc), supply the appropriate case # and program type under Categorical Eligibility and leave HH Size & Income blank.
- If the child is a foster child, note that. In rare cases, you may need to note income the foster child receives; otherwise, leave that blank.
- Generally, the signature on the form must correspond to one of the HH Member's names. The system won't check for that, so be sure to check that manually.
- You must supply either the SSN or indicate that no SSN is on file. If you don't have either, you can note the form is Incomplete. Incomplete forms are always treated as Paid.

When the [Evaluate + Save] button is clicked, the system will calculate according to the appropriate year's poverty guidelines, and determine the reimbursement level:

Each IEF Application is saved, historically. So you can use the drop down choice next to IEF Application to review any historic IEF application that you've saved in Minute Menu for this child.

IEF Application FRP vs. Child FRP

It's important to note that the FRP level that is computed and displayed in the IEF Calculator is NOT the FRP level used by the software generally. The software exclusively uses the FRP

Reimbursement Level found in the upper left hand corner of this Oversight tab. When you save an IEF Application, if the child's current reimbursement level is different than the level computed by the IEF calculator, it will ask you if you want to apply that to the child's file. Typically, you'll say yes:
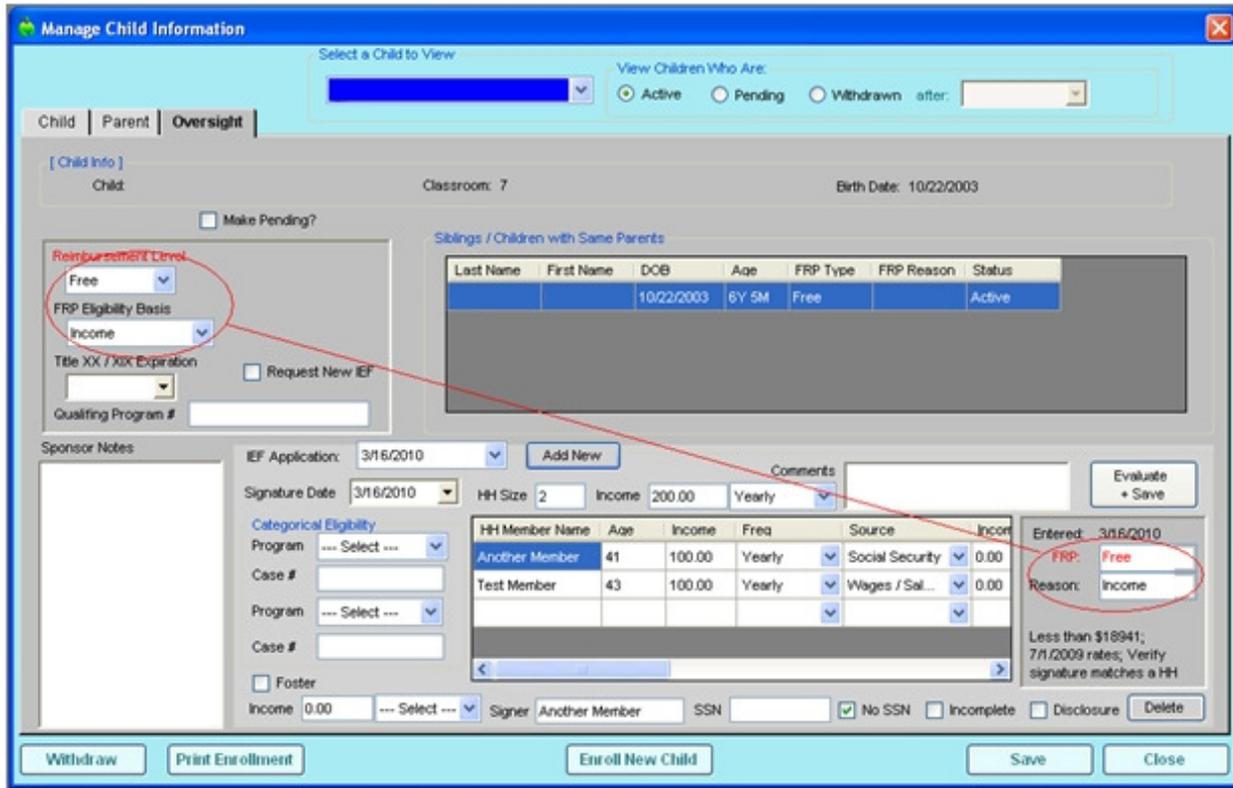
And you'll still need to [Save] the child's file afterward, as the IEF Application Calculator record is saved independent of the child's.

Siblings

Unless a foster child is involved, all children in the same family should have the same reimbursement level. Minute Menu knows children are in the same family if they have the same parent selected on the Parent tab of Manage Child Information. Children in the same family are listed in the Siblings grid on the Oversight tab of Manage Child Information:

Siblings / Children with Same Parents

Last Name	First Name	DOB	Age	FRP Type	FRP Reason	IEF Expires	Status
Bishop	Hank	7/20/2009	1Y 6M	Free	Foster	11/30/2011	Active
Brown	Mark	4/7/2004	6Y 9M	Free	Income		Active
Brown	Susan	3/23/2003	7Y 10M	Free	Income		Active

If you notice any discrepancies in that siblings grid w/respect to FRP level, fix them! When enrolling a second child in a family, there's no reason to supply the IEF Application information for each additional child. When you enroll the child, you'll see in the Siblings grid the other sibling's FRP level, so you can apply that Reimbursement Level to this child.

Also, check out **Reports >> Children >> Verify Family RFP Consistency Report**. This report identifies any FRP discrepancies in any center, immediately, so you can easily fix any discrepancies to maximize your CACFP reimbursement.

Renewing IEFs and Notifying Centers

As noted above, IEFs can be set to expire independent of enrollment forms, or they can be assumed to expire with the child's enrollment. This is tracked via Manage Child Information on the Child tab via the Enrollment Expiration date; and if IEF expiration dates are used, they are recorded on the Oversight tab of Manage Child Information.

When centers log into the software, the center is given a pop-up screen advising them of any children who are expiring soon, or who have already expired. This list of expiring children could include just one list: children whose enrollments are expiring. Or it could include a second list if you track IEFs separately, where the second list notes children whose IEFs are expiring.

So child care centers will be automatically notified about any enrollments and/or IEFs that need to be renewed. The center would just print out a new enrollment & IEF for the child, have the parent fill it out, and then the expiration dates for the enrollment could be moved forward and a new IEF Application could be put into Minute Menu's calculator.

Note: If you don't want centers to see these reminders, you can disable them via Administration >> Manage Policies, policy D12b.

Requesting New IEFs

In some cases, it's useful to request new IEFs from centers even before the IEFs expire. For example, if a child is right on the cusp of being classified as Reduced, but the child's IEF form doesn't expire until February of the following year, you may want to obtain
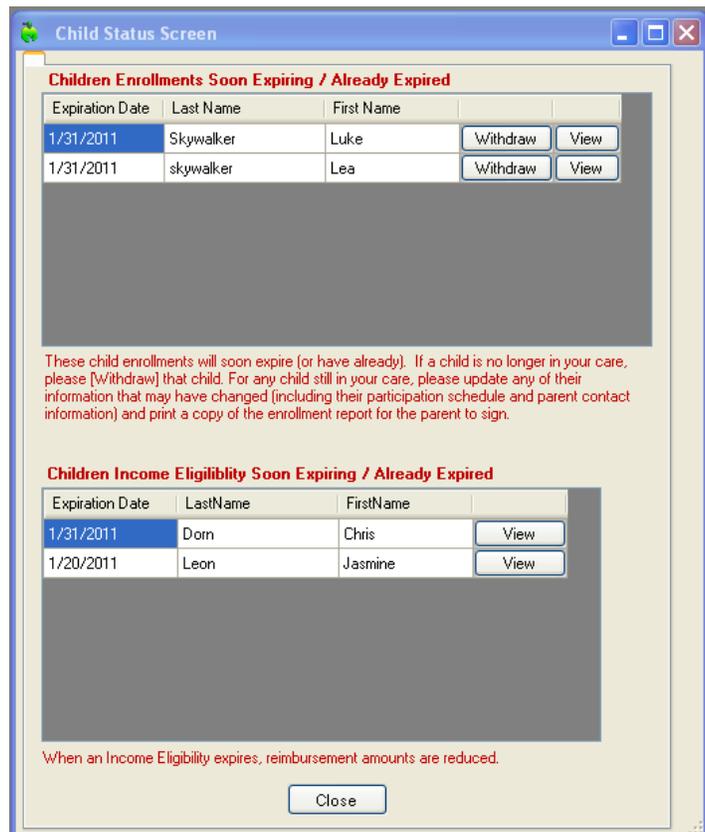
an updated IEF for the child in July because the child may now be classified as Reduced given the new poverty rates.

You can specifically request the center get an updated version of the IEF. Put a check in the **Request New IEF** box on the Oversight tab of Manage Child Information. When the center next logs in, the center will have a pop-up asking them to get an update of that form:

Updated Eligibility Form Requested

Last Name	First Name	Accepted	
Dorn	Chris	☐	View
Dorn	Cindy	☐	View

The above children are eligible, but we believe these children are newly eligible for a higher rate of reimbursement. Please have the parents fill out a new income eligibility form and send that in to increase reimbursement.
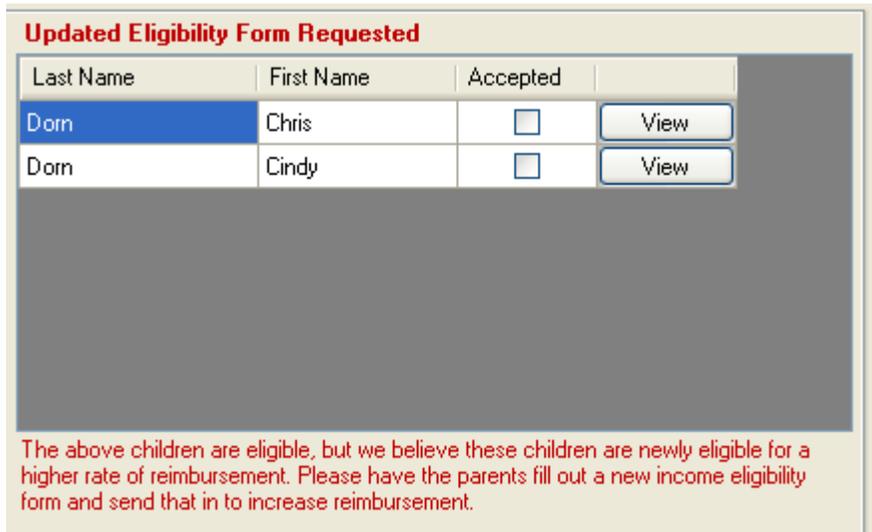
Mass Renewal

Different agencies can handle IEFs in different ways. Some have centers manage all aspects of the IEF process. Others handle forms in the sponsor or back office. The Renew Child Enrollments function can be useful in the latter scenario.

When it's time to renew a large number of IEFs (and enrollment forms), centers will send those forms to the back office. You can quickly update enrollment expirations, and if necessary set/change FRP levels, for all the children in a center using the File >> Renew Child Enrollments function:
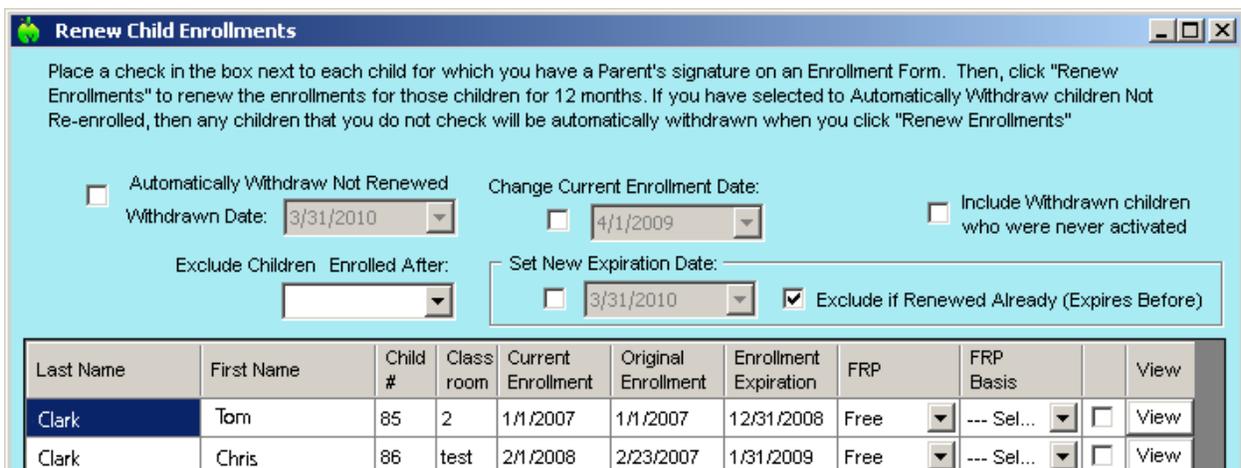
Put a check next to each child for whom a new enrollment / IEF form has been received. Here are some tips to using this properly:
- If you want to automatically withdraw children that aren't marked, put a check in the **Automatically Withdraw Not Renewed** box (and choose an appropriate effective Withdrawal Date).

- Be sure to put a check in **Set New Expiration Date**, and each child will have their enrollment expiration date updated to the date you supply.
- If you also want to move the Current Enrollment form date forward, be sure to check **Change Current Enrollment Date** and set it appropriately.
- You can filter the list of children to exclude brand new enrollments by supplying a date in the **Exclude Children Enrolled After** field.