TIPS FOR USDA SDI FORMS & QUARTERLY REPORTS

The Emergency Food Assistance Program (TEFAP) is the USDA program that provides food for distribution to people in our community who meet certain eligibility requirements. The USDA, through the Virginia Department of Agriculture and Consumer Services (VDACS), provides food to the Blue Ridge Area Food Bank, which, in turn, distributes that food to partner agencies who serve the community through food pantries. The regulations that govern TEFAP require both the Food Bank and our partner agencies to follow certain procedures in order to qualify for receiving USDA commodities.

Each agency's key responsibilities are to help clients fill out Self Declaration of Income forms and provide USDA food only to clients whose SDI forms indicate eligibility, fill out Quarterly Reports, turn in all SDI forms and Quarterly Reports to the Food Bank in a timely manner, store and handle food in a safe and healthy manner, and refrain from discriminating against any person who seeks food.

The Food Bank's key responsibilities are to train agencies on their responsibilities, collect the required recordkeeping from each agency, monitor food storage and handling practices, and act as a conduit for information and communication between the agencies and VDACS.

The BRAFB Agency Relations team created this Tip Sheet as a model for training new USDA agencies. We hope it will also serve as a handy tool for experienced agencies. As always, please do not hesitate to contact your Community Outreach Coordinator whenever you have questions.

Self Declaration Form Tips

- ☐ 1. All information in the top right-hand corner (member agency, member agency number, and volunteer initials) must be completed.
- ☐ 2. Client's name, address and telephone information must be filled in.
- ☐ 3. If the client's *entire* household receives SNAP, SSI, TANF, place a check in the appropriate spot and then fill out the household member components (name, age, gender of each person in the household). No income levels are required.
    - Special rule for Medicaid recipients: For one-person households that receive Medicaid, just fill in the household member information (name, age, gender). For Medicaid recipients who do not live alone, total household income must be declared, therefore it is necessary complete the household member information components as noted below.
- ☐ 4. If not everyone in the household receives *at least one of the same* benefit, income levels should be recorded, including the actual monies received from the benefit program for which an individual qualifies. (SNAP benefits are not actual money and therefore should not be counted as income.) List the income of each household member and check the appropriate payment frequency box (i.e. monthly, weekly, bi-weekly, or yearly).

☐ 5. In the “Total Household Members” box on the last line of the chart, write the number of household members. Then, on that same line, under the Income heading, the household’s total monthly income should be entered. For example, if a household has one member who makes $1,000 monthly, and another member who makes $100 weekly, this box should read “$1,400 monthly.”

☐ 6. Compare the household’s Income with the TEFAP guidelines to determine eligibility.
Income information:
- If monthly income, use the figure to check TEFAP table.
- If weekly, multiply by 52 and check the annual income limit.
- If biweekly, multiply by 26 and check the annual income limit.

☐ 7. The form must be signed by the person requesting assistance each time the person receives food (i.e. up to 6 times), or follow the bullet points below for alternate pick-up or proxy pick-up.
- If signed by an alternate, the alternate information must be filled out on the form in advance. A letter to the pantry is not acceptable.
- A proxy note may be used on a one-time basis to authorize another individual (even though that person is not listed as an alternate on the SDI) to pick up food on behalf of the household. Agencies must keep proxy notes on file whenever anyone picks up USDA food for another household. A proxy note may be used only if an SDI for that six-month period is already on file for that household.

☐ 8. <u>No other information</u> such as birth date or social security number should appear on the SDI form.

☐ 9. Each time a client comes to an agency, the agency volunteer should ask whether any information on the form has changed. When changes have occurred in family composition, address, or income a line should be drawn through incorrect information, dated and initialed by client and volunteer. Or, when such changes have occurred, a new SDI form can be completed

☐ 10. The agency <u>may not</u> ask for any form of identification from the client. Doing so violates TEFAP regulations.

Quarterly Report Tips

☐ In the first row, write the name of each product.

☐ 1. The Amount on Hand should be the same as the Physical Count amount from the previous report.

☐ 2. The Amount Received should be the number of cans or bags of the product that your agency received during this quarter.

☐ 3. In the Amount Available, write the total of lines 1 (Amount on Hand) and 2 (Amount Received).

☐ 4. The Amount Issued should be the number of cans or bags of the product that you distributed to clients during this quarter.

☐ 5. The Amount Damaged should be the number of cans or bags of the product that were damaged and, therefore, not distributed to clients this quarter.

☐ 6. The Physical Count should be the total cans or bags of this product that your agency now has (as of the end of the quarter). (This number should be the amount on line 3, minus the amounts on lines 4 and 5.)