

FOOD STAMP FREQUENTLY ASKED QUESTIONS & ANSWERS NYS OPWDD (Revised 12/17/10)

FILING FOR NEW FOOD STAMP BENEFITS

How Do I Apply For Food Stamps?

You will need to complete the LDSS-4826 (Revised 5/08) Food Stamp Benefits Application/Recertification Form and submit it to the local Department of Social Services. This information can be found at:

[http://www.otda.state.ny.us/main/apply.asp#Food Stamps](http://www.otda.state.ny.us/main/apply.asp#Food%20Stamps)

You may also call toll free for the address and phone number of the local Department of Social Services nearest you. For Outside of NYC, you can call 1-800-342-3009. If you live in NYC, you can find the Food Stamp Center near you by calling 1-800-342-3009 or dialing 311.

For an individual that lives in a Voluntary Community Residence or Individualized Residential Alternative (CR/IRA), do we have to include the names of everyone living in that residence on the Food Stamp application form?

No, you should only list the individual that you are applying for and not the entire household. A separate Food Stamp application is required for *each* individual in any given CR/IRA and/or Family Care home. However, you should work with your local district social services office to find ways to work together to coordinate and streamline the application and interview process as much as possible. That makes less work for everyone.

On the top of the Food Stamp application, it says “Residence Address” and then it says “Mailing Address” – in what instance would I want to put a different address?

There are several reasons you would enter a different address. One would be if the “residence” address was a street address and the “mailing” address was a Post Office Box. Another reason you might want to enter a different address is when you are the Authorized Representative of the individual that you are applying for. In the “residence” address, you would enter where the individual actually lives and for the “mailing” address, you would enter the address of the Authorized Representative. We strongly recommend doing it this way. By doing it this way, the Authorized Representative would receive all future Food Stamp Notices which would assist the Authorized Representative in recertifying the Food Stamp case and would be less likely to have the case closed due to not recertifying.

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It is my understanding that resources do not affect the Food Stamp eligibility anymore; is that true?

Resources only affect the eligibility of households that have gross income over 200% of the Federal Poverty Level (FPL) (USDA updates their poverty standards in October of every year – Effective October 1, 2010, 200% FPL is \$1,805 a month. This level will remain in effect until September 30, 2011 and is updated annually). Individuals with income over 200% of the FPL will have a resource limit of \$3,000. Households with aged/disabled members may be eligible for the Food Stamp Program with gross income over 200% of the FPL, but they cannot be categorically eligible. (If the individual's gross income exceeds 200% of FPL, they may still be eligible for benefits. They will need to have resources below the applicable limits and their income must be budgeted so appropriate disregards may be applied to see if they are eligible.)

What income needs to be listed on the application?

Any income the individual has needs to be entered on the Food Stamp application. This includes: wages, pensions, Supplemental Security Income (SSI), Social Security benefits, Veteran's benefits, unemployment benefits, worker's compensation, etc.

Our Food Stamp Office is requesting that we include a birth certificate with the Food Stamp Application – is that necessary?

Yes, the birth certificate is necessary to verify the applicant's date of birth.

What other documentation needs to be included in a new Food Stamp application?

While each Food Stamp Office handles FS applications in their own way, applicants are always required to verify their eligibility.

The following is a list of the ***eligibility factors that must be verified*** as a condition of eligibility for Food Stamp benefits and some of the documents that can be used for verification.

IDENTITY: Must be established and documented for the individual making the FS application. Any of these documents can also be used to verify age. In addition, the U.S. Passport and Naturalization Certificate can also be used to provide citizenship and alien status.

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- Birth Certificate
- Photo I.D., Driver's License
- U.S. Passport
- Naturalization Certificate
- Hospital/Doctor's Records
- Adoption Papers

AGE: Must provide verification of age for all individuals applying for FS benefits.

- Birth Certificate
- Baptismal Certificate

SOCIAL SECURITY NUMBER: Must provide a social security number or proof that one has been applied for. *(If an applicant knows and lists his/her social security number on the application, he/she does not need to provide a social security card.*

- Social Security Card
- Official correspondence from the Social Security Administration (SSA)

CITIZENSHIP AND ALIEN STATUS: Must be documented for immigrant individuals applying for FS benefits. Birth Certificates, hospital records, US passport and naturalization papers can also be used to provide identity and age.

- Birth Certificate
- Hospital Records
- US Passport
- Military Service Records
- Naturalization Papers
- USCIS Documentation
- Evidence of continuous residence in the US since prior to 1/1/72

EARNED INCOME: If individual is employed, the hours worked and amount earned must be documented.

- Current wage stubs (If paid weekly, you'll need the last 4 paystubs. If paid bi-weekly, you'll need the last 2 paystubs.)
- Pay envelopes
- Letter from employer listing hours worked and hourly or weekly salary
- Current income tax returns
- If self-employed – records and related materials concerning earning and expenses

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UNEARNED INCOME: If individual is in receipt of unearned income, the income source and amount must be documented

- Statement from family court
- Current award letter
- Official correspondence from SSA
- Official correspondence from the Veterans Administration
- Current benefit check or stub
- Statement from bank or credit union
- Statement from person providing support
- Unemployment Income Benefit Statement (UIB)

RESOURCES: *Only needed for disabled or aged 60 or older individuals who have income above 200% of the poverty level* Also, households that contain an individual that cannot receive FS because of a sanction **are required to verify resources**, if they have any. Note: If you have resources but are not sure whether or not you are required to verify them, provide the verification. This way, if it turns out that the household was required to verify resources, the eligibility decision will not be delayed.

- Current bank or credit union records
- Stock/bond certificate
- Statement from financial institution
- Burial plot agreement or deed
- Property deed and/or appraisal
- Life Insurance
- Vehicle registration/title

My agency will be applying for Food Stamps for many individuals. Do we have to apply for Food Stamps one at a time at the local DSS Office?

The Office of Temporary Disability has sent out a notice to the local DSS Offices to let them know that many of OPWDD's voluntary agencies will be applying for Food Stamps for a large number of individuals. Many districts will allow the Authorized Representative for the residents to bring a group of Food Stamp Applications at one time and do the interviews for several applicants at one meeting or phone call. You should contact your local district to discuss the situation and work out an arrangement. Please be aware that due to the increased Home Energy Assistance Plan (HEAP) and the large number of new Food Stamp applications, the Food Stamp districts are seeing huge increases in their caseload. Please be patient and understand that the Food Stamp districts are doing their best to accommodate you as fast as they can. It is strongly

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suggested that you have the new Food Stamp applications stamped in as a “protective filing” date. Once the new applications have a protective filing date, the Food Stamps will be opened retroactively to that date. (If you are mailing the applications in, you should mail them certified mail so you have verification that the applications were received by the Food Stamp district.)

For the NYC area: all Food Stamp applications need to go through the F61 Congregate Care Unit located at 227 Schermerhorn Street, 1st Floor, Brooklyn, NY 11201. NYC FS has its own set of instructions. If you need a copy of the instructions, please e-mail Sheila.Carollo@opwdd.ny.gov to request them.

Is the Medicaid Service Coordinator responsible for filing and recertifying Food Stamps?

It is up to the Voluntary Agency to decide who is responsible for filing and recertifying Food Stamp benefits on behalf of the individuals in their care.

Do we apply for Food Stamps for an individual that is being tube fed?

Even though Medicaid will pay for Enteral formulae and supplies for tube feeding, you would have to question if the individual is also receiving other food/drinks not paid for by Medicaid. OTDA has advised as long as an agency is spending on average more on food per person for that particular IRA than they are receiving in Food Stamp benefits for that IRA, the agency will be in compliance. You should use discretion in this area. If an individual is only being tube fed and NOT consuming any other food items, an application should not be filed. However, if an individual is able to consume other food/drinks, you should request additional data about the person in question and base your decision on the information obtained.

What’s the difference between being tube fed and receiving nutrition through a G-Tube?

There are several variations of feeding tubes (e.g. PEG Tube or PEJ Tube). They are all “feeding tubes”. They are named differently according to the placement of the tube.

Would an individual residing in a NYS certified group home (IRA or FC) under the age of 18 be eligible for Food Stamp benefits if they were a U.S. citizen, had a social security number and met the income and resource requirements?

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Yes, the individual residing in an eligible Congregate Care Level I, II, or III facility would be eligible for Food Stamps.

Even though the individual is under the age of 18, living in an eligible Congregate Care Level I, II, and III facility and no longer residing with their family, would their parent's income and resources be counted towards the minor child?

No, the parent's income and resources would NOT be counted against the individual in care.

Our agency will be opening a new IRA in the near future, how do we handle the Food Stamp process for individuals going into the new IRA?

Agencies should begin to prepare the Food Stamp applications and have the applications ready to be submitted to the Food Stamp Office the day that the individual moves into the IRA. The Food Stamp Office cannot process an application without an operating certificate number; therefore, agencies should *not* apply for Food Stamps *before* the individual enters the IRA. But agencies should apply for Food Stamps immediately following the placement so that the Food Stamp application is stamped in that very day.

Why is it so important for the Food Stamp application to be done immediately?

The Food Stamp Office can only go back to the date of the Food Stamp application as the start date of the Food Stamp benefit. If an agency waits to apply for Food Stamps, the individual's Food Stamp case won't be opened until the date that the application is received and not when the individual actually was placed in the residence. It is recommended that the Food Stamp application be personally delivered and date stamped in by the Food Stamp district to protect the Food Stamp filing date. If an agency mails in the application, they should do so by certified mail so they have a receipt that the application was received by the FS District.

What happens if an agency applies for Food Stamps for an individual that has just moved into a new IRA and the county requests the operating certificate that the agency does not have yet?

This issue may come up when a new IRA is opened. A new IRA will not show up on the Congregate Care Directory at the county. At the time of the IRA opening, a handwritten operating certificate number is given to the agency for the IRA. You can copy that handwritten operating certificate number and give it to the

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Food Stamp worker. If there are any issues that come up with this process, you can contact Sheila.Carollo@opwdd.ny.gov and she will follow up with the Office of Temporary Disability (OTDA) for resolution.

Once I go through the application process and complete the Face-to-Face interview – what happens next?

You or your Authorized Representative will get a Food Stamp Notice in the mail if the Food Stamp Office is requiring any additional information. If the local DSS Office has all the information they need, they will send a notice that the Food Stamp Application has been approved or denied. The approval notice will provide dates of coverage and monthly benefit amount. An Electronic Benefit Transfer (EBT) card will be issued to the Authorized Representative along with a PIN to access benefits. The denial notice will give the reason and steps to be taken if you disagree with the determination.

What do I do with the notice?

You should file the notice and make sure that your agency has a way to track the individual's Food Stamps end date. If your agency is the Authorized Representative, it will be your responsibility to make sure a Food Stamp recertification is completed before the end date; otherwise, the individual's Food Stamp case will be closed and you will have to apply for Food Stamps all over again.

Is it mandatory for our organization to apply for Food Stamps for the individuals that we serve? If so, will there be a deadline by which we need to complete our applications?

It is an agency's responsibility to apply for all benefits and entitlements on behalf of the individuals that they serve. Agencies should be applying for benefits on an ongoing basis.

ELECTRONIC BENEFIT TRANSFER (EBT)

What is EBT?

EBT stands for Electronic Benefit Transfer. EBT is the method by which New York State Office of Temporary and Disability Assistance (OTDA) delivers cash and Food Stamp benefits to New York State's recipient population. Cash and Food Stamp benefits are deposited into electronic benefit accounts which can be accessed using a Common Benefit Identification Card (CBIC) and Personal

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Identification Number (PIN). The card can be used at EBT participating ATM machines and Point of Sale (POS) terminals throughout the state.

How do I set up an EBT Cardholder Account?

EBT Cardholder accounts are set up for EBT clients. These accounts are created by JPMorgan once the State transmits the required case, benefit and EBT card information. However once an agency applies and is approved to become a Meal Service Retailer through the Food & Nutrition Service at USDA, your agency will be registered to the FS retailer database maintained by JPMorgan. JPMorgan will review this information and will contact your agency with instructions and provide you with the necessary forms and equipment for processing EBT FS transactions.

When I contact JP Morgan, will they recognize my agency?

Once your agency is contacted by JP Morgan they will have a record of your assigned Food and Nutrition Service (FNS) number. You will want to make them aware that you are a *MEAL SERVICE RETAILER* and NOT a Grocery Store Retailer. This will verify that your information is registered in the correct database to validate your FNS number for Meal Services.

FOOD STAMP AUTHORIZED REPRESENTATIVES

Who should be the Food Stamp Authorized Representative for our agency?

For the individual that is unable to handle his or her own food stamp benefit, it is recommended that Agency Administrative Personnel (i.e., Business Officer) be authorized as Authorized Representative. An Authorized Representative should be someone who is knowledgeable about the circumstances of the residents applying for benefits. (You cannot just use the agency's name as the FS Authorized Representative - it has to be a person's name within that agency.)

Due to the constant turnover of residents and staff it is not recommended that House Managers become Authorized Representatives (Unless the House Manager at that agency is still going to the store to redeem the FS benefits instead of the agency scanning the cards on the Point of Sale terminals within their agency.)

An individual as determined by his/her treatment team as being capable of handling his or her own Food Stamp benefit may continue to redeem his/her own benefits using his/her CBIC card. An agency may serve as Authorized Representative if the individual does not object.

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Does the Authorized Representative receive a special card to access Food Stamps for the individual?

In order to receive an Authorized Representative Electronic Benefit Transaction (EBT) card, you must request one when you apply for Food Stamps. If you do not request an Authorized Representative card, the individual will automatically receive a Client Benefit Identification Card (CBIC) once the Food Stamp case is opened. The CBIC card can be used for accessing Food Stamps and also for Medicaid transactions. ***NOTE: You will need to contact the Local Department of Social Services Food Stamp Office to find out their process for ordering Food Stamp Authorized Representative Cards. Many Food Stamp Offices require that a LDSS 4942 (Food Stamp Program Authorized Representative Request) Form or a 608V (Client Benefit Identification Card Signature Authorization) Form (for NYC) be completed in order to request a Food Stamp Authorized Representative Card.***

Is our agency required to request Authorized Representative Cards?

Yes, if your agency is Authorized Representative for an individual, the agency should be using a FS Authorized Representative Card. Agencies should not be scanning the CBIC Card on the Point of Sale terminals or at the grocery stores if they are the FS Authorized Representative for that individual. If the individual is buying & preparing his/her own meals, then the individual should be using their CBIC Card at the store.

What is the difference between a FS Authorized Representative Card and a CBIC Card?

FS Authorized Representative Cards are used solely for FS purposes. The CBIC Card is for medical appointments and can also be used to access FS benefits. The FS Authorized Representative card looks similar to a CBIC Card, but it will have a FS Authorized Representative's name as well as the individual's name on the card. The FS Authorized Representative card should be locked up at the main office where the FS benefits are redeemed at the agency. PIN#s for these cards should not be kept in the same place as the FS Authorized Representative Cards for security reasons. The CBIC cards should be locked up at the house where the individual lives and should only be used for medical appointments. (Unless the individual is handling their own FS benefit – in that case, the individual would have their card.)

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Our agency contacted the appropriate local Food Stamp District and ordered Food Stamp Authorized Representative Cards for our individuals. We received some cards, but not all of them. What should we do?

The local Food Stamp Office should be contacted to inquire about the cards that were not received. The Food Stamp Office may ask for a list of the individuals that you haven't received cards on. Make sure to include the FS Case # (The FS Case # will show on the original Food Stamp Notice that your agency received letting you know the case was opened.) It is also helpful to have the Medicaid CIN# available to assist the Food Stamp Worker in locating the case.

Our agency would like to scan the Food Stamp cards on our Point of Sale (POS) terminal, but how can we scan for the individuals that we didn't receive the Food Stamp Authorized Representative Cards for yet?

Agencies can either wait for the Food Stamp Authorized Representative Card to arrive, or if they have the Client Benefit Identification Card (CBIC) (also known as the Medicaid Card) available, they can use that card until they receive the Authorized Representative Card. This would be the only time an agency should scan a CBIC card through their POS terminal to access benefits.

APPLYING TO BECOME A MEAL SERVICE RETAILER

Agencies have the option of becoming a Meal Service Retailer, which would allow their agency to swipe the Food Stamp cards on behalf of their individuals within their own agency without having to go to the store. In order to apply to become a Meal Service Retailer, you will need to complete a Form 252-2 (Application for Meal Services). You will also need to attach copies of operating certificates for all the CR/IRA residences and proof of your agency's tax ID. Make sure that the operating certificates submitted have a current expiration date on them.

Who may become a licensed retailer for Food Stamps?

A licensed retailer is a Food Stamp merchant who is certified and licensed by USDA-FNS for redeeming food sales to eligible Food Stamp customers. An agency providing meals such as a CR or IRA, may also qualify as a Food Stamp retailer providing the facility meets all the Food Stamp licensing guidelines.

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Once I complete the FNS-252-2 Form to become a licensed retailer, where do I send the form?

You will need to send the completed FNS-252-2 Form to the appropriate Food and Nutrition Service (FNS) Field Office. **(Please Note: Do NOT send the FNS-252-2 form to your local DSS Office)**

There are four FNS Field Offices. They are as follows:

New York City (Bronx, Nassau, Manhattan, Suffolk, Westchester)
212-620-3691

Metro (Brooklyn, Staten Island, Queens)
212-620-7803

If your agency is in the **New York City** or **Metro area**, you should mail your FNS-252-2 forms to:

**New York City Field Office (601)
Food and Nutrition Service, USDA
201 Varick Street, Room 609
New York, NY 10014**

Rochester (Allegany, Broome, Cattaraugus, Cayuga, Chatauqua, Chemung, Chenango, Cortland, Erie, Genesee, Jefferson, Lewis, Livingston, Madison, Monroe, Niagara, Oneida, Onondago, Ontario, Orleans, Oswego, Schuyler, Seneca, Steuben, Tioga, Tompkins, Wayne, Wyoming, Yates)
585-263-6744

Albany (Albany, Clinton, Columbia, Delaware, Dutchess, Essex, Franklin, Fulton, Greene, Hamilton, Herkimer, Montgomery, Orange, Otsego, Putnam, Rensselaer, Rockland, St. Lawrence, Saratoga, Schenectady, Schoharie, Sullivan, Ulster, Warren, Washington)
518-431-4274

If your agency is in the Rochester/Albany area as stated above, you should mail your FNS 252-2 forms to:

**Food and Nutrition Service, USDA
O'Brien Federal Building, Room 752
Clinton Avenue & North Pearl Street
Albany, NY 12207**

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For information on the appropriate FNS Field Office contact, go online at http://www.fns.usda.gov/cga/Contacts/FieldOffices/New_York.htm

What do FNS Field Offices do?

FNS Field Offices authorize qualified retailers to accept Food Stamp benefits, provide information to retailers, and enforce the program rules to prevent errors and abuse. The FNS staff is available to answer any questions and advise you on program rules and procedures. Always consult with them if you have a problem or are unsure how to handle a particular situation.

How long does it take to process the Meal Services Application and how will I know to contact JP Morgan for the Point of Sale (POS) terminal?

USDA has reported that it usually takes 45 days to process the Meal Services Application (Form FNS 2-252). Once USDA approves your agency as a provider, they will send you a Food Nutritional Services (FNS) permit including your new FNS number that identifies your agency as a Meal Service Retailer. Once your agency is approved as a Meal Service Retailer you will be registered to the FS retailer database maintained by JPMorgan. JPMorgan will review this information and will contact your agency with instructions and provide you with the necessary forms and equipment for processing EBT FS transactions.

Should we keep copies of the paperwork that we prepared for USDA to become a Meal Retailer?

Yes, copies should be kept of everything – especially the USDA FNS# approval and operating certificates. Every 3-5 years (depending on funding), USDA is required to participate in a Reauthorization Project where some of the same information that was originally provided is needed.

Once our agency has been approved to be a Meal Service Retailer, should we notify the Food and Nutrition Service (FNS) at USDA of any new IRAs that have been added since the permit was issued?

Yes, when you open a new IRA, you should send a letter to the appropriate FNS/USDA Office and attach a copy of the operating certificate of the new IRA to the letter.

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POINT OF SALE TERMINALS

What are Point of Sale (POS) Terminals?

Point of Sale (POS) terminals are only provided to USDA-FNS licensed food retailers and provide a means for using the Authorized Representatives Food Stamp Benefit EBT Card and PIN to debit a food stamp account for an individual being served in one of the voluntary or state operated residences.

How does my agency obtain a POS Terminal?

In order for your agency to become a retailer and set up a POS terminal, you will need to contact the United States Department of Agriculture (USDA) at 1-877-823-4369 or go online at www.fns.usda.gov/snap

USDA will have you complete a USDA Food Stamp Application for Meal Services (FNS-252-2) Form to apply to be licensed and certified. With that form, you will need to submit supporting documentation (e.g., a copy of a current business license in your agency's name, photo ID, and copy of acceptable tax ID.) Once USDA approves the application, you will receive a certificate and will be issued a Food Nutrition Services (FNS) number that will identify your agency whenever a Food Stamp transaction is used. Agencies that redeem \$100 in Food Stamps per month will qualify for one free POS terminal.

For information on FNS Field Office Contacts, look at:
http://www.fns.usda.gov/cga/Contacts/FieldOffices/New_York.htm

What are some advantages of having a POS Terminal?

Agencies would have more centralized control of Food Stamp benefits with a POS Terminal since one individual in the accounting office can swipe each EBT card, enter the PIN and have funds deposited electronically into an agency Food Stamp account. Also, with such an account agencies that do so could use Food Stamp funds for certain bulk purchases of eligible foods (e.g. canned goods, frozen foods, cereal, fresh produce, etc.)

Is my agency required to obtain a POS Terminal?

No, agencies should establish a system of usage of, and accountability for, Food Stamp benefits which fits their unique needs and the needs of the individuals served.

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Will my agency have to pay for the POS Terminal?

If your agency redeems at least \$100 in food stamps per month, your agency will qualify for one free POS terminal.

Are there other costs related to the POS Terminals?

Your agency will be responsible for setting up the phone lines needed for the POS terminals.

Does our agency need to set up a bank account in order to use the POS terminals?

Yes, when you receive your POS terminal from the state contractor, you will need your bank account information so payments may be sent to your account. If you change your bank or your account, you must tell the contractor so that the payment will go to your new account.

When we set up our agency bank account, what name should be on the account?

It is recommended that you identify the agency officer in charge of your account as the signator along with his/her title. This provides controls to a specific person solely responsible for managing the account spending and reconciliation process.

Is there anything else I should know about the POS terminals?

You will receive retailer instructions when you receive your POS terminal.

Now that our agency is applying to be a retailer for the Food Stamp Program, is there any training material available regarding the retailer's responsibilities?

Yes, there is a training guide called "The Food Stamp Program Training Guide for Retailers". This training guide can be found at:

<http://www.fns.usda.gov/snap/retailers/store-training.htm>

I've seen this training guide. Does this guide really apply to my agency?

Yes, as a retailer, you have the responsibility to follow all Program laws and regulations. This guide will help you learn the Program rules and answer common questions about the Food Stamp Programs. You will need to keep in mind, though, that this guide is also geared toward the Grocery Store Retailers.

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If an agency handles both OMR and OMH individuals, do they use the same POS terminal to redeem the Food Stamps for both OMR and OMH?

Yes, having the Food Nutrition Service (FNS) Number and the equipment will provide the agency with the ability to accept any type of EBT card for Food Stamp benefits, regardless of the program.

Our agency has already been approved to be a Meal Service Retailer and received our FNS#. We have just received paperwork from JP Morgan that needs to be completed and sent back right away in order for us to receive our POS terminal. Who do I call if I have any questions regarding this paperwork?

You should contact JP Morgan at 1-800-350-8533 for questions regarding the forms. Make sure to explain that you are a “Meal Service Retailer” and not a Store Retailer. The forms will need to be completed in blue or black ink and white out is not acceptable. If you make a mistake, you will need to contact JP Morgan for a new form. A VOIDED check of the bank account that the agency will be using for their EBT deposits must be attached to the paperwork.

The paperwork that we received from JP Morgan seems to be confusing because it asks about “store” information, which doesn’t pertain to us. What should we do?

JP Morgan only carries one contract regardless of what type of retailer site. Agencies should answer as best they can or enter “Not Applicable” in the sections that don’t pertain to our Meal Service Retailers.

Whose signature should be on page 4 of the Retailer Agreement Electronic Benefits Transfer Program Contract?

JP Morgan reported that the signature on the contract MUST BE the name of the permit holder (the person’s name that is on the FNS Contract) or they will reject the application.

Should we keep copies of the JP Morgan contract?

Yes, agencies should always keep copies of the paperwork involving the POS terminals.

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ACCOUNTABILITY

As a new Agency Retailer, I am worried about an audit. Should I be concerned?

As long as you are able to document that your agency is spending an amount on food each month equal to or above the Food Stamp amount for the individual that you serve, you should not be concerned. You must keep a record of all Food Stamp transactions for the individuals that you serve so that if you are audited, you will have the records readily available. Agencies must also carefully track individuals that leave their residences so that they do not access inappropriate benefits.

How long should my agency keep documentation for auditing purposes?

According to the FS Regulations, documentation should be kept for four years.

What are the accountability requirements for agencies that do not choose to obtain a POS Terminal?

Agencies must maintain an annual record of the amount of Food Stamp benefits *received* by each individual regardless of whether the agency is the Authorized Representative. Agencies must also maintain receipts of all purchases using Food Stamp benefits for a period of four years, preferably for all individuals but minimally, for those individuals for whom the agency is Authorized Representative (there are some individuals, for example, in supportive apartments that purchase their food independently and do not contribute to the agency for the cost of food. These individuals are not required to maintain receipts.)

Some agencies eat “family style” where the staff eats along side the individuals at the residence & they are worried if this will be a problem during an audit. Will this be a problem?

FS benefits should be used for the individuals in the residence. While we understand the “eating family style” concept, agencies need to make sure that the amount spent on the residents equals or exceeds the amount of FS benefits coming in for those individuals at that particular residence. (For example, if the residence has 4 individuals each receiving \$200, they should be spending at least \$800 on food for that residence.) Agencies need to make sure EBT cards are being used for their intended purpose and Food Stamp benefits are being redeemed appropriately and accurately, and all the EBT settlement reporting for each facility is being maintained for audit purposes.

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Will our agency be able to track the available Food Stamp balances for the individuals that we are authorized representative for?

Yes, every time you process a Food Stamp transaction on the POS Terminal a receipt will print reflecting the debit transaction amount and the Food Stamp account balance associated to the EBT card. You may also call the EBT Customer Service Helpline number, printed on the back of the EBT card, to receive transaction and balance information or by going to the JPMorgan Cardholder Account website at: www.ebtaccount.jpmorgan.com

How should an agency build internal controls so the system is not abused?

That is for the agency to determine. Foremost, internal controls must consist of safeguarding EBT cards and PINs. One recommendation to prevent abuse would be to take advantage of becoming an Authorized Retailer and getting a Point of Sale (POS) device for the Business Office, and redeem the benefits to their retailer account. If your agency establishes a process for redeeming benefits each month, it should reduce the likelihood of abuse and simplify accounting and auditing. It is recommended that agencies process food transactions on designated days of the month to ensure that Food Stamp settlement deposits are processed timely and will assist to develop an accurate audit trail and establish processing controls.

Is our agency able to ask an individual to use their Food Stamp benefits toward the individual's meal costs?

As long as the agency is providing the individual's meals and the residence monthly per capita food expenditure exceeds the Food Stamp amount, the agency is entitled to redeem the full monthly amount of a resident's Food Stamp benefits.

When during the month are Food Stamp benefits available for my agency to access through our POS terminal?

Food Stamp benefits are made available for a recipient each month based on the last digit of his or her Food Stamp case number (Except for NYC). The last digit of the Food Stamp case number determines the day of the month the benefit is available. If the last digit of the food stamp case number is a 5, benefits are available on the 5th of the month. For NYC Food Stamp cases, there is a "Benefit Availability Schedule" – Form EBT-52A that will show the day each individual's benefits are available based on the last digit of the Food Stamp Case number.

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Individuals living in OPWDD Congregate Care Homes should follow Cycle “A” on the Benefit Availability Schedule.

I heard that it is recommended that agencies wait until after the 15th of the month to access the Food Stamps. What is the reason for this?

If agencies wait until the 16th of the month to swipe a group of Food Stamp cards, the agency will not have to worry about when each individual’s Food Stamp benefit is available. Another advantage to swiping the Food Stamp card after the 15th of the month is that as long as the individual is in the residence for the first half of a given month, the individual is entitled to the Food Stamp benefit for that month even after they move out of the residence. If the agency swipes a Food Stamp card before the 16th of the month and that same individual left the residence before the 16th of the month, the agency is only entitled to receive a prorated amount of the monthly Food Stamp benefit. The prorated formula used is the amount of the FS benefit divided by 30 days. (For example – if the individual receives a \$200 FS benefit, the agency should divide the \$200 by 30 days which results in \$6.67 per day in benefits; therefore, if the individual leaves the residence on the 5th of the month – the agency is entitled to \$6.67 X 5 days = \$33.35.)

Can an agency EBT Authorized Representative access Food Stamp benefits for an individual if the individual is on home leave?

If while on leave, the individual is not being accounted for food consumption, then the Authorized Representative should not debit the account until the individual returns to the facility. Agencies should keep in mind that monthly benefits do carry over.

If an individual is in a hospital or nursing home for a full calendar month, should the Food Stamps be accessed?

The individual’s food stamp benefit may be accessed the first month. However, the agency should notify the Food Stamp district within 10 days after the 30 day stay to let the district know what is going on. The local Food Stamp district will take the appropriate steps to notify the agency on the disposition of the case.

Our agency already scanned the Food Stamp benefit card for an individual that went to a Nursing Home. We tried to return the amount by following Page 17 of the Retailer EBT Manual “Authorizing a Food Stamp Return”, but kept getting a declined message. Why are we getting declined?

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The agency should make certain they are using the correct card and PIN to process the return and the user has logged into the terminal using the supervisory information. Returns to Food Stamp accounts may only be processed if there is a sufficient credit balance associated to the account. The EBT system will only authorize returns once the benefit has been withdrawn and the credit amount has been established; therefore, it is very important that FS returns be made immediately after discovering the error. As a reminder, return transactions can only be done in \$75 increments. For example, if you want to return \$250, you have to do it \$75, \$75, \$75, and then \$25 to make up the total return of \$250.

When our agency tried to return the amount as stated above, the terminal asked for the “3 digit supervisor ID” – how do I know what that ID is?

When you received your POS terminal, you should have received a manual and a 3-digit supervisor ID with the terminal. If you did not receive the 3-digit supervisor ID, you should contact JP Morgan at 1-800-831-5235 to ask for one. **Note:** Have your FNS# available before you make the call, so you have it readily available when JP Morgan asks for it.

If we accessed Food Stamp benefits for an individual in error, can we reimburse that individual with a check or cash?

No. All reimbursement transactions must take place through the EBT Card system by following the directions on Page 17 of the Retailer EBT Manual “Authorizing a Food Stamp Return”. If you are following the directions but still getting denied, you should contact Sheila Carollo at Sheila.Carollo@opwdd.ny.gov describing everything that was tried along with the denial reason and Sheila will contact OTDA, if necessary, to resolve the issue.

How long do I have to access Food Stamp benefits for an individual through my POS terminal before the benefits are no longer available?

If the Food Stamp account is not used for 365 consecutive days, any Food Stamp benefit remaining in the EBT account that is at least 365 days old will be expunged (removed) from the account.

While reviewing our JP Morgan statement, we noticed that each month we received a small deposit that stated “ACHE Funds, Corp, NY OTDA EBT”. We can’t match this deposit to any of our card swipes. What could this deposit be for?

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These credits consist of reimbursements for POS supplies. JP Morgan credits the Point of Sale holder small amounts of money for supplies that are needed for the POS terminal (reimbursing agencies for machine tape or ink that might be needed for the terminal). These small amounts are credited to the account on a monthly basis and are for your agency to use for supplies needed for the terminal. If you have questions, you can contact the first level helpline number printed on the terminal. Agencies can also confirm this by contacting the eFunds/FIS helpline at 800-831-5235.

Our agency swiped for \$14,923 worth of Food Stamp benefits for a specific day, but when we looked at the amounts on the terminal record, the amount is different than what we swiped for. What happened?

Your agency most likely cleared the totals off the POS terminal prior to having completed the activities for that specific day.

As a good basis for reconciliation it is recommended that an agency clear their daily POS totals closer to the end of the business day. This will provide the opportunity to capture the accurate number of transactions processed during the balance of the day.

Agencies can directly contact the Retailer Help Desk (800-350-8533) if they experience any other problems with their daily settlement and reconciliation. Agencies can also go on the JP Morgan EFS Retailer Website link www.ebtreailerinfo.jpmorgan.com. Agencies simply need to register, at no cost, to review their settlement information. The upper Blue bar contains the Log-In link for registering to the site.

Our agency recently moved its administrative office. After setting up the POS terminal in our new location, we discovered that it is not working properly. Our Information Technology group determined that it doesn't appear to be the phone line. Each time we try to process an Authorized Representative Card, the machines states for about 2-3 minutes that no connection can be made – then it does finally connect. After that, it still takes another 5 minutes or so for the information to be transmitted. Before our move, we could process over 70 cards in two hours. Now, it is taking us about 1 hour to do 7 cards. What should we do about this?

The agency should call the FIS/eFunds POS Equipment Helpline and discuss the problem. Their operators will direct the agency on how to troubleshoot the transaction delays or request a replacement. The POS Equipment Helpline is at 1-800-831-5235.

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What are the agency's responsibilities for reporting changes for individuals receiving Food Stamps?

As Authorized Representative, you must notify the local Department of Social Services Food Stamp Department or the New York City Food Stamp Center of the person's move (This is any move – whether the individual moves to another agency or whether the individual moves from one IRA to another, etc.). Change of address, change in source of income, increase or decrease in monthly income, and excess resources are some of the changes that need to be reported. The time frames are determined by the type of income received and most changes must be reported within 10 days of the end of the month in which the change occurred. Agencies should report changes in monthly wages of more than \$100. If the individual's income is over 200% of the FPL *and* their resources exceed \$3,000 – the excess income & assets must be reported.

If your agency is a licensed retailer, you must also let your Business Office know of the move so they will no longer redeem the Food Stamp benefits for the person.

If a person leaves your residence after the 15th of the month, no refund is due to Food Stamps.

If the person leaves your residence before the 16th of the month a prorated refund of that month's benefit will have to be made to Food Stamps. (For example: If the individual receives a \$200 FS benefit, the agency should divide the \$200 by 30 days which results in \$6.67 per day in benefits; therefore, if the individual leaves the residence on the 5th of the month – the agency is entitled to \$6.67 X 5 days = \$33.35) This can be done by following the directions on Chapter 7, Page 18 of your EBT Retailers Manual "Authorizing a Food Stamp Return".

How do I find the various Food Stamp Regulations?

You can find the Regulations at:

USDA - <http://www.fns.usda.gov/snap/rules/regulations>

OPWDD – http://www.opwdd.ny.gov/regq/hp_regq_foodstampoffset_text.jsp

How do I know what food is acceptable under the Food Stamp Program?

You can find a list of eligible and ineligible food items online at:

<http://www.fns.usda.gov/snap/retailers/eligible.htm>

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Should our agency apply for the Home Energy Assistance Program (HEAP) in addition to applying for Food Stamps for the individuals in our CR/IRAs?

No, you should not apply for HEAP separately. When you apply for Food Stamps on behalf of your individual in a CR/IRA, the dollar HEAP benefit (which is the only amount individuals in CR/IRAs are eligible for) is already included in the Food Stamp budget methodology which allows the individual to receive a higher Food Stamp benefit. Applying separately for HEAP benefits will NOT increase the Food Stamp benefit.

As a Service Coordinator I meet families I think that may qualify for Food Stamp Benefits. What can I tell the family?

You can inform the families that they can go online at: www.mybenefits.ny.gov to see if they are eligible for Food Stamp benefits This website is a prescreening tool which provides a quick and easy way for people who live in New York State to find out if they might be able to receive Food Stamp benefits (as well as other government benefits)

This website will take about 10 minutes to use. There will be questions about the people in the home, the money received from jobs and other places, housing costs, and a few other bills. When the required information is complete, the system will let the person know if they might be able to receive help through the Food Stamp program. Keep in mind that this website is just a test to see if you might be able to receive benefits. The test results are based on the information that is provided. Therefore, if the information provided is not complete or incorrect, the test results listed may not be accurate.

Legally, does the resident staff person need to bring each consumer (whose Food Stamp card is being used) to the grocery store with them?

No, the staff person does not need to bring each individual to the store with them. Some individuals are not able to go to the store. As long as the staff person has the individual's card and the PIN#, they can use it without the individual being there. Keep in mind, if the agency is the FS Authorized Representative for the individual, they should be using the FS Authorized Representative Card at the store.

If we decide to use the POS machine at our office (and swipe the Food Stamp cards each month, for the money to be credited to a bank account), do we need to keep separate grocery expense records BY INDIVIDUAL CONSUMER? Or by household?

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If you use the POS machines, you will print a receipt for *each* individual to keep for your records. As long as you keep track of the expenses for the *household* AND the per capita expenditures on food for the residents in care exceeds the average benefit amount received by residents in receipt of Food Stamps for that household, you should satisfy any audit requirements.

When a person leaves an IRA and moves back home, how does the Food Stamp money stop being put on the same benefit card used for Medicaid? Or is it the same amount received if they move back home with their parents?

If a person leaves their IRA and moves to their family or into an independent living situation, the residential provider should notify the local Food Stamps Office of the change in the person's type and location of residence. The Food Stamps Office will change the amount on the case to the appropriate amount for the new living situation. The Food Stamps will continue to be accessible through the same benefit card used for Medicaid. You should destroy the Authorized Representative Card that your agency may have at that time. Agencies should remember that if the individual leaves their IRA before the 16th of the month, the agency should refund a prorated amount of the benefit back to the individual on the EBT system. This can be done by following directions on Chapter 7, Page 18 of your EBT Retailers Manual "Authorizing a Food Stamp Return".

Note: If the individual is moving into another county – the Food Stamp case should be closed by the local Department of Social Services and the individual should reapply for Food Stamps in the new county.

Can an individual access Food Stamps in another state?

Yes, you can access Food Stamps in another state - although we wouldn't expect to see this happening unless the individual lives on the border of another state and shops in that state.

What happens if my agency doesn't spend equal to or above the amount of Food Stamps received for an individual?

It should be questioned as to **why** the agency is not spending at least that amount. Food Stamps are to be used for the ongoing nutritional benefit of the individual. Agencies want to be sure that they are spending, on average, more than the amount of Food Stamps received each month. If, for some reason, the individual is not using the entire FS amount, the agency should not swipe the entire amount.

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When swiping the Food Stamp card through the Point of Sale (POS) terminal, does the entire amount have to be taken out or can the agency decide what amount they want to take out each month?

No, the entire amount does not have to be taken. OTDA actually encourages debiting accounts during the course of the month to allow for benefits to last longer and to not fall short of being able to make the purchases before the account is depleted.

How does my agency know if the “correct” Food Stamp amount is received for an individual?

It is your agency's responsibility to make sure that the most up to date and correct information is provided to the Food Stamp Office. If the correct information has been given, the Food Stamp budget should be correct. If you feel that the Food Stamp amount for an individual is not accurate, you should contact the Food Stamp Office to discuss the specific case. For State Operated DDSOs – you should contact your local Revenue Support Field Office to check into the matter.

An individual that has already been receiving Food Stamps has come to our agency with an outstanding Food Stamp balance on their EBT card. Our agency is now Authorized Representative for this individual. If our agency has receipts to show that we spent more than the monthly FS amount for this individual, can the agency scan for part of the individual's previous balance on the EBT card?

No, it is not acceptable for the agency to scan for more than the monthly benefit the individual receives. Agencies can only swipe for the benefit amount issued each month even if they may have spent more. Agencies cannot access Food Stamp benefits that were accumulated before the start date of the new agency. (The only way the previous benefit can be spent, is if the individual him/herself used their own card to purchase something that they wanted.)

Remember: The balance that was on the individual's EBT card BEFORE they arrived at the new agency, should remain as the balance on the EBT card AFTER they leave the agency (unless the individual decides to use their own card for purchases that they wanted).

Although Food Stamp recipients will see an increase in their allowances for 2009, will their wages if above the SSI threshold negatively affect the amount of their Food Stamp allowances or will they receive the maximum allowances as projected regardless of their wages?

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Food Stamp benefit amounts are determined through the budgeting process at the local Food Stamp Offices. Wages will always be budgeted for Food Stamps and if high enough, will cause a reduction in the Food Stamp benefit that the individual receives.

Individuals do not automatically receive the maximum benefit. It is based on the individual's earned & unearned income. So, if you have an individual that has high wages, they will see an amount lower than the maximum benefit.

If individuals begin receiving Food Stamps, will this affect/reduce their Medicaid benefits?

Medicaid benefits are not reduced or affected in any way by someone receiving a Food Stamp benefit.

Our agency has been in the practice of giving individuals in our Supported IRA program \$50 per week to shop for groceries. Recently, we changed this process so they actually get \$50 per week in W-dollars through our local Wegmans grocery stores. Up until this point, the individuals have also received and used their own Food Stamps. At this time we are looking to secure the Food Stamps. If an individual refuses to give us access to his/her Food Stamps, can we deduct the amount of money we give them on the W-dollars to cover the Food Stamps amount?

Agencies are able to ask an individual to use their Food Stamp benefits toward the individual's meal costs. Agencies are entitled to redeem the full monthly amount of a resident's Food Stamp benefit as long as the agency is providing meals for the individual and the residence monthly per capita food expenditure exceeds the Food Stamp amount.

OPERATING CERTIFICATES

Some of our operating certificates have dates that have expired and USDA will not accept them. Who should I contact to resolve the situation?

You will need to contact the OPWDD Quality Management Department to explain the situation. Upstate agencies should contact the Albany Office at 518-474-3625. Downstate agencies should contact the NYC Office at 212-229-3350. They are able to verify whether the operating certificate is still valid and can send a letter on their letterhead stating that the expired certificate is still valid & current if further verification is needed.

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MAG-TEK (PIN CHANGING) TERMINALS

Agencies have the option of requesting PIN Changing Terminals that will allow them to change PIN #s for the Food Stamp Authorized Representative Cards. Agencies should make sure they consider whether or not they feel it necessary to obtain a terminal. Many agencies feel that since they rarely have to change PIN#s they prefer to call the 800# to change the PIN#s without having to maintain & secure the PIN changing terminals.

Before requesting a PIN changing terminal, agencies should have already applied to become a Meal Service Retailer through USDA, have been approved and assigned a FNS# through USDA, and have applied for or have already received a Point of Sale (POS) terminal from the vendor - JP Morgan.

Below is a checklist of the steps that are required of the Facility Coordinator that is requesting a PIN changing terminal:

- Notify Sheila Carollo, NYS OPWDD, at 518-402-4339 or Sheila.Carollo@opwdd.ny.gov to start the process
- Complete *Caps Terminal Information Form* (Sheila will provide this form upon first contact) and return to Sheila
- Once form is submitted to Sheila, Sheila will submit information to OTDA who will forward the terminal request to JP Morgan
- Complete and electronically submit the CAPS User ID Request Form and e-mail to Tina.Sorell@otda.state.ny.us (Sheila will also provide this form.)
- Once the EBT MAGTEK CAPS terminal has been received from JP Morgan, notify Sheila of the date the terminal was received and the serial number of the terminal
- Report any future changes in users (adding, deleting, name changes) to Tina Sorell at OTDA and Sheila Carollo at OPWDD

REMINDER: *Agencies should be aware that a shared or dedicated phone line must be provided to connect the terminal modem. A shared phone line is acceptable during the times the terminal is being used. The phone line must be capable of dialing to an 800 number without any special dial-out code, such as *9 or any other special text.*

We are completing the CAPS User ID Form that needs to go to Tina Sorell and have a few questions:

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Since we are applying for a NEW User ID, we should leave the “Existing CAPS ID” field blank, correct?

Yes, when you are adding a new user for the first time, you should leave that area blank.

In the “Notes on What To Do Next” that we receive from Sheila Carollo, it states that the CAPS User ID Form does not need to be signed, but should we still type in the name of the user and manager?

Yes, you should type the User and Manager name in the fields.

On the CAPS User ID Request Form, it has areas that say “State Section” and “State Security Administrator Use Only” and “JP Morgan EFS Use Only”. Are we correct that we do not have to fill out these sections?

Yes, that is correct. You will only need to complete the top section and leave all the other sections blank.

We received our MAG TEK CAPS terminal, but the machine keeps saying “no dial tone”. To check our line, we have plugged in a regular phone and received a dial tone and can make calls, so we know it’s not a problem with the line. What should we do?

JP Morgan should be contacted to let them know the problem. Most likely, they will send another terminal.

We received a new terminal and had the same problem above. What do we do now?

First, you should check to see if you sent the terminal AND black modem. If you only sent the terminal, it could be a problem with the modem. If you sent back *both* the terminal and modem the first time, your only option is to request another terminal. Much of the equipment is rebuilt and reissued and there is always the possibility replacements will fail several times and will need to be reordered. If you have further problems, you should contact Sheila Carollo at 518-402-4339 or e-mail her at Sheila.Carollo@opwdd.ny.gov so that she can refer the problem to OTDA for resolution.

We’ve haven’t used our MAG TEK CAPS terminal for a while now. Recently, when we went to use the terminal, it wouldn’t let us access it. What seems to be the problem?

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It is suggested that agencies access their MAG TEK CAPS terminal every 30 days to keep your User ID current. If the terminal is not used within 90 days, the User ID & password will be removed from the system and you will have to contact Sheila.Carollo@opwdd.ny.gov to arrange for a new User ID & password again.

We no longer use our MAG TEK CAPS terminal, we would rather change our PIN numbers going through the 800#; what should we do with the terminal?

An agency that has a MAG TEK CAPS terminal that is no longer being used, should return the terminal to JP Morgan. Agencies can do this by calling 1-866-607-7734 to request a shipping label. Agencies should provide Sheila Carollo (Sheila.Carollo@opwdd.ny.gov) and Tina Sorell (Tina.Sorell@otda.state.ny.us) the serial number and the date of shipment of the terminal.

Who should we notify if we recently replaced one of our MAG TEK CAPS terminals with a new one?

Agencies should provide Sheila Carollo and Tina Sorell (at the e-mail address listed above) the serial #s and the date of shipment of any terminal that has been replaced. The NYS Office of Temporary Disability Assistance (OTDA) is required to track all terminals (including Point of Sale (POS) terminals) that have been distributed by JP Morgan.

MISCELLANEOUS

For Consolidated Fiscal Report (CFR) reporting purposes, should food expense be reported as gross or net of Food Stamps?

Food expenses should be reported as gross on CFR-1, Line 21.

For CFR reporting purposes, will the food stamp revenue be reported as gross with an offset on another line for the recoupment or will it just be reported as net?

The Food Stamp revenue should be reported as gross on CFR-1, Line 82. There is no recoupment for the Food Stamps. The prices will be issued net of the Food Stamp offset. The resulting revenue for the billing of these prices should be reported at this revised level on the appropriate line on CFR-1. (Either Line 72, Medicaid or Line 94, Other, for non-Medicaid eligible billings.)

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Who should our agency contact when we have questions or concerns about the OPWDD Offset or further questions about CFR reporting?

Your agency should contact Joanne Howard, Director of OPWDD's Rate Setting Unit at 518-402-4330.

How will our agency keep up with the latest changes with the Food Stamp Program?

Agencies should go online to the Office of Temporary Disability Assistance (OTDA) website to find out the latest changes with the Food Stamp Program:
<http://otda.ny.gov/main/>

To find the latest General Information System (GIS) Messages that OTDA releases:
<http://otda.ny.gov/main/policy/gis/>