

2022-2023 TEFAP Intake Form & Process Guidance

(Revised 11/2022)

Intake Forms

The intake form is a self-attestation, meaning clients are not required to provide proof of eligibility to receive pantry services. The USDA administrator for NYS (the NYS Office of General Services) has mandated that TEFAP participating programs in NYS use the approved form – *“OGS Food Distribution is not allowing any alterations to this form, including adding a backside to the form for additional intake information. The only exception to this would be a handwritten phone number on the form. Any other additional information found on the front or backside of the form will make us non-compliant with federal regulations.”* **This newly issued form may not be altered.**

From November, 2022 onward any new clients to the food pantry must complete the TEFAP / OGS Intake Form.

Option 1:

Clients complete the TEFAP Intake Form once per year, and sign once per year, but are verbally asked if any information in their household has changed at each visit. If there have been changes, clients need to “re-sign” attesting that they are still eligible.

~~-OR-~~

Option 2:

Clients complete a TEFAP Intake Form, and re-sign each time they visit the food program (similar to previous years).

Whichever processes is used should be fair and equitable and applied to **ALL** clients visiting the food program.

*Permissible under USDA guidance:

- A. Food programs may require proof of address at each visit OR once each year.
- B. Food programs may require clients to sign each time they receive services
- C. Food programs may use an electronic intake / database for recording the services provided.
- D. Food programs may collect the names of each person in the household to determine size of household.
- E. Food Program may allow “proxy” pick-ups (pickups by designated people or household members) as long as the process is fair and equitable.
- F. If your program provides other services that require additional information, you may request the information, so long as the client is informed that the information is not required for receiving food assistance from the pantry **AND** the information is kept in a separate form and file.
- G. Food programs may keep their existing service areas or “boundaries.” Please serve out of area clients the first time and make a referral to the appropriate food program.
- H. Signatures should be requested on each Intake Form; however, it is optional for the clients to sign.

Prohibited under current USDA guidance:

- A. Food programs may not collect birthdates of clients or household members
- B. Food programs may not photo copy or keep proof of address (IDs, birth certificates, utility bills, etc.)
- C. Food programs may not keep additional or prohibited information with, or attached to, the TEFAP Intake.
- D. Food programs may not require proof of income as a condition for receiving food assistance.

Using an electronic registration or intake

Food Bank’s partners are encouraged to use an electronic registration form when and where feasible. If you are using an electronic registration process, or would like to, please consult Food Bank’s Agency Relations Team for guidance and to ensure the process meets the USDA standards for food programs.

As a friendly reminder, additional requirements still apply. To continue being eligible for TEFAP, food programs must:

- Maintain Intake Form & Records
 - Keep intake forms for three years after they “expire” (example: 2021-2022 Intake Forms should be kept until June 30, 2025).
 - Keep a copy of the “executed TEFAP agreement” on site.
 - Keep delivery invoices or copies of delivery invoices on site.
- Post signage
 - “And Justice for All” Poster
 - Income Guidelines
 - Notice of Beneficiary Rights
- Report Service Numbers monthly, on time, to FBCNY
- Food Safety Training
 - Keep copy of training log on-site and renewed annually.
- Civil Rights Training
 - Keep copy of training log on-site.
 - All volunteers with client contact must be renewed annually