

Quarterly Reporting/Prospective Budgeting Questions and Answers

Question: The quarter is July/Aug/Sept. The family consists of Mother, one cash-aided child, and one SSI child. On 8/3 the recipient calls her worker and reports that she believes her income increased in July to a level whereby she is mandated to report. The worker asks for and receives information from the client about the income that's been reported. The child received one SSI check for \$643, and the mother received two paychecks from her job totaling \$898. The IRT for this family is \$1361. Because the total income of \$1541 exceeded the IRT Mom reported it to the CWD.

A) Should the CWD exclude SSI/SSP from the combined gross income prior to determining whether the income exceeds the IRT?

Response: It is the CWD's responsibility to determine whether income is exempt from being considered for eligibility and benefit determination. In this case, the SSI income would not be included in determining continuing eligibility and benefit amount.

B) Our county will not act on the reported information until verified. So, as of the day the client called, do we document and evaluate the reported information and send a no change NOA? Or do we document the reported information, verbally request verification and recalculate only when the verification has been received?

Response: For reports of income that exceeds the IRT, verification will not be required prior to taking action to discontinue CalWORKs and FS benefits. For voluntary reports of decreased income, the client must verify the decrease prior to the benefits being increased or sending a NOA.