

DEPARTMENT OF SOCIAL SERVICES

744 P Street, Sacramento, CA 95814



April 29, 1997

ALL COUNTY INFORMATION NOTICE I-27-97

TO: ALL COUNTY WELFARE DIRECTORS

REASON FOR THIS TRANSMITTAL

- State Law Change
 Federal Law or Regulation
 Change
 Court Order
 Clarification Requested by
 One or More Counties
 Initiated by CDSS

SUBJECT: CHANGES TO THE JA 2, STATEMENT OF FACTS FOR CASH AID AND FOOD STAMPS

REFERENCE: ALL COUNTY INFORMATION NOTICE I-96-64 AND ALL COUNTY LETTER NO. 95-38

This letter transmits the JA 2 (4/97), Statement of Facts for Cash Aid and Food Stamps. Narrative and format parallel the SAWS 2 (10/96) released in All County Information Notice I-96-64. See Attachment A for information about implementation, obtaining of camera-ready copies, translations, and stock. See Attachment B for a detailed outline of the changes to the form.

If you have any questions or need further information, please contact the following staff regarding the specific program areas:

- o The JA 2 and this letter: Elizabeth Allred at (916) 657-3350 or CALNET 437-3350;
- o Food Stamp Program: Melissa Buchanan at (916) 654-8467 or CALNET 464-8467;
- o Asian/Spanish translations: Shirley LuKung at (916) 654-1277 or CALNET 464-1277.

Sincerely,

BRUCE WAGSTAFF
Deputy Director
Welfare Programs Division

Attachments
c: CWDA

IMPLEMENTATION

For Aid to Families with Dependent Children and Food Stamp cases, non-ISAWS [Interim Statewide Automated Welfare System] counties have the option of using either the JA 2 or the SAWS 2 (Statement of Facts for Cash Aid, Food Stamps, and Medi-Cal/State-Run County Medical Services Program). Counties that use the JA 2 are advised to implement the 4/97 version as soon as administratively feasible.

CAMERA-READY COPIES AND TRANSLATIONS

Counties needing a camera-ready copy of the English and Spanish (SP) versions may call the Forms Management Unit at (916) 657-1907 or CALNET at 437-1907. For Asian language versions (Chinese, Cambodian, and Vietnamese), counties may FAX their requests to the Language Services Bureau at (916) 657-3429 or CALNET at 473-3429. Counties may call (916) 464-1282 if only one form is being ordered.

STOCK

CDSS stock for the BC JA 2 and the BC JA 2 SP are exhausted. The California Department of Social Services (CDSS) will issue the Notice of Change Form (GEN 127) when the English and SP language versions of the forms are available. The English language version is expected to be available in late May 1997. The JA 2 SP is expected to be available at a later date. See the County Forms Catalog for the procedures for ordering forms from the CDSS Warehouse.

JA 2 CHANGES

The JA 2 (4/97) replaces the BC JA 2 (11/92). Differences between the JA 2 and the BC JA 2 are outlined below. "PAGE" numbers refer to placement on the JA 2. "New Item" number refers to the question number on the JA 2 and "Old Item" number to its placement on the BC JA 2.

PAGE 1

- o A "Work Pays" Logo is added.
- o The instructions section under the form title is reformatted into bullets and the narrative is revised.
- o New Item 1: Narrative is revised and applicant/caretaker relative information is numbered to parallel the SAWS 2.
- o New Item 2/Old Item 1: The following subset items regarding adults living in the home are revised and/or reformatted:

In the "Citizen/Non-Citizen Status" section narrative is revised and checkboxes are added for "Lawful Permanent Resident (LPR) and "Amnesty Alien with I-688." The "Blind or Disabled" item is expanded to "Blind, Deaf, Disabled." The "Pregnant" subset status question is added. Old item 3 "Is anyone pregnant?" is eliminated. Documentation of the WIC [Women, Infants, and Children] referral for the Special Supplementary Food Program is relocated to the "Regulations Met" section on Page 13, as follows: "Pregnancy verified/WIC Referral."

- o The County Use Only (CUO) section at the bottom of the form is reformatted and revised:

The first column adds new codes 15-17 for **NON-HH [HOUSEHOLD]/ EXCLUDED MEMBERS** for Food Stamps. Additionally current codes for items 10-13 are renumbered.

The second column is retitled "FS [FOOD STAMP] WORK/fRAINING EXEMPTIONS." Item "b" in the column is revised to "Mentally/physically unfit for work."

A third column adds codes for "FS ABAWD [Able Bodied Adults without Dependents] EXEMPTIONS (63-410.3)."

A fourth column adds the "GAIN EXEMPTIONS."

PAGES I AND 2

- o The County Use Only (CUO) columns to the right of items 2 and 3 are reformatted:

The abbreviations "SFU" and "AU" replace the terms "Standard Filing Unit" and "Assistance Unit" and "GAIN" [Greater Avenues for Independence] replaces "AFDC Status" in the "Work Registration/Exemption Codes" section.

"Citizenship/Immig[ration]" is changed to "Citizen/Non-Citizen." Separate checkboxes document verification of "Citizen," "Eligible Non-Citizen" and the "SAVE" [Systematic Alien Verification for Entitlements] on-line system. Also added is a place to document an eligible non-citizen's "Date Admitted to the U.S. [United States]."

On page I: counties can document an "ABAWDS" work/training exemption code.

PAGE 2

- o New Item 3/Old Item 2 for children living in the home :
Narrative is revised to facilitate completion by the applicant/recipient.
"Birthdate" is revised to add "or Due Date." The subset items for "Citizenship/Immigration Status," "Blind, Deaf or Disabled," and "Pregnant" are changed to parallel the narrative/format in new item 2.
New subset item "Is Child Living in Your Home Now?" replaces old item 5.

- o New Item 4/Old Item 6:
Narrative is changed to "Does the other parent(s) of the child(ren) or unborn live with you? If NO, explain below."
Subset narrative is reworded and reformatted: "Name of Other Parent" and "Give the Reason the Other Parent Does Not Live in the Home."

PAGE 3

- o New Item 5 regarding a change in citizenship or immigration status is added.
- o New Item 6A/Old Item 4 regarding foster child(ren) is reworded.
- o CUO for Item 6A: Narrative and checkboxes are added to document foster child/caretaker relative's (CR) aid status for the Aid to Families with Dependent Children-Family Grant Program.
- o New Item 6B adds a question regarding household composition and the treatment of foster care payments in the FS program.
- o New Item 7 adds "Has anyone ever used any other name (Maiden, adoptive, etc.)?"

- o New Item 8/Old Item 7, regarding California residency is reformatted and now labelled for cash aid only.
- o New Item 8C/Old Item 8 regarding relocation to California from another state is included as a subset item to the California residency question. The CUO section is revised to document RFG [Relocation Family Grant] status.
- o New Items 9A and B/Old Items 9A and B: Narratives regarding sanctions, welfare fraud, and Intentional Program Violations (IPVs) are revised.
- o New Item 10 is added regarding fleeing felons and parole/probation violators. Format and narrative parallel the TEMP 2131, the required addendum to an application for FS.
- o New Items 11 and 12/Old Items 10 and 11 regarding separate FS household eligibility clarify that information is requested for persons "living with you." The "purchase food and prepare meals" narrative in item 12 is language simplified to parallel the "buy food and fix meals" narrative in item 11.

PAGE 4

- o New Items 13A and B/Old Items 14A and B: Subset items A and B regarding room and board are reversed and language simplified.
- o New Item 14/Old Item 12 for the FS Food Distribution Program and New Item 15/Old Item 13 for the eligible out-of home institutions: Each item is reformatted to facilitate completion by the applicant/recipient. The CUO section for item 14 is revised to document a FS eligible food program.
- o The CUO section for new item 16A adds yes/no checkboxes to document verification of "School Enrollment."
- o New Item 16B is added to obtain information regarding attendance, educational expenses, and financial aid status when attending college or a similar education institution.
- o New Item 17/Old Item I6: Narrative is revised and subset items are reformatted to obtain information for the Cal-Learn Program.
- o The CUO section for item 17 adds check boxes to document a referral to Cal-Learn and when a CA 25 [Supplemental Statement of Facts - Minor Parent] and a CA 25A [Payee Agreement for Minor Parent] are given to the minor parent.

- o New Item 18/Old Item 17: Narrative regarding military service and dependents is revised. A grid is inserted to obtain specific subset information. Narrative and yes/no checkboxes are added to obtain the "honorable discharge status" of the person serving in the United States military. The CUO section adds yes/no checkboxes for documenting honorable discharge status for FS.

PAGE 5

- o New Item 19/Old Item 18: Narrative regarding current and anticipated work status is revised and reformatted.
- o New Item 20A/Old Items 25A and 25B: Requests for child care and dependent costs are combined into new item 20A.
- o CUO for Item 20A: Narrative and checkboxes are added to annotate when "Trustline Informing (CCP 2)" and the "Health & Safety Certification (CCP 5)" are provided. Also added are yes/no checkboxes to document separate AFDC and FS eligibility for child care deductions.
- o New Item 20B is added to obtain information on reimbursement of child care costs.
- o New Item 21/Old Item 20: Narrative regarding the payment of child/spousal support is slightly modified.
- o New Item 22/Old Item 23: Narrative and format for voluntary quit or job refusal are revised. The CUO section is reformatted: Narrative and checkboxes for job refusal by a FS applicant are eliminated. Checkboxes are added to document when a "FS Work history [during the] last 120 days" is obtained.
- o New Item 23/Old Item 21 regarding strikes is reformatted and a new subset item is added: "Gross Monthly Income Earned From This Job Before the Strike."
- o New Item 24/Old Item 19 regarding application for or receipt of "unemployment or disability insurance benefits" (UIB) is reformatted.

PAGE 6

- o New Item 25/Old Item 22 adds "Is He/She a Native American? If YES, List Tribe." In the CUO section, yes/no checkboxes are added to document when a "Tribal JOBS Referral" is made.
- o CUO for Item 25: The table for determining the Principal Earner for AFDC is reformatted and reworded. The summary for "UIB" for person 25A is now located below the table.

PAGE 7

- o New Item 26A/Old Item 24: Narrative and format for the income question are revised.
- o New Item 26B adds "Does anyone expect a change in the current amount of money received now, such as a cost-of-living raise?"
- o New Item 27/Old Item 26: Narrative and format for the free or in-kind income question/CUO sections are revised.
- o New Item 28A/Old Item 27: Narrative and format changes for the real estate holdings/purchases question and CUO sections are revised.
- o New Item 28B adds an AFDC question: "Does anyone own a house that is not lived in now that he/she hopes to return to someday?"
- o CUO sections on Pages 7, 8, and 9 are revised to document page totals for "Countable property" for AFDC and FS.

PAGE 8

- o New Item 29A/Old Items 28A and 29: Instructive narrative for clients regarding liquid assets is streamlined and reformatted.
 - The subset table is reconfigured to separate some types of "resources;" to request information about additional types of resources; and to incorporate information about burial trusts and life insurance policies from old item 29.
 - The CUO section for new item 29A adds a checkbox for a "Restricted Account."
- o New Item 29B/Old Item 28B: Minor narrative and format changes are made for the question and subset table regarding current or anticipated income from real and personal property.
- o New Item 30/Old Items 30A and B: Narrative and format changes are made regarding personal property. The CUO section adds check boxes to identify property that is "Owned Jointly" or "Owned Separately."

PAGE 9

- o New Item 31/Old Item 34: Narrative and format changes are made for the question and the CUO section regarding transfer of real and personal property.
- o New Item 32/Old Item 30C: The motor vehicle sections completed by the applicant and the county are substantially reformatted.

PAGE 10

- o New Item 33/Old Item 31 is substantially reformatted to obtain more accurate information regarding housing costs.
- o New Item 34/Old Item 32 is substantially reformatted to obtain more accurate information regarding PS utility costs. The CUO section is modified for PS documentation of metering and proration of the SUA [Standard Utility Allowance].
- o New Item 35/Old Item 33: narrative is changed to include authorizing "someone else in your household...to pick up your food stamps... "

PAGE 11

- o New Items 36, 37, 38, 39, and 40/Old Items 35, 36, 37 and 38 for .health insurance coverage and prior health care costs: Narratives and formats are changed and reformatted. Items are resequenced.
- o New Item 37 is now labeled for PS. The item is reformatted to determine the total amount eligible for a PS medical deduction.
- o The CUO section for item 37 documents when the "DFA 285-C [PS Supplemental Statement of Facts For Special Medical Deductions]" is given to the household. Additionally, the worker documents the amount of the Medicare premium eligible for a PS deduction in "Gross Premium."
- o New Item 41 identifies a disability caused by injury or accident for AFDC.
- o New Item 42/Old Item 39 is now labeled for PS. The CUO section is reformatted to separate verifications of medical needs for AFDC and PS.
- o New Item 42B obtains information regarding the receipt of "In-Home Supportive Services (IHSS)." The item identifies potential eligibility for cash aid to the higher MAP amount and for PS a medical deduction for out-of-pocket IHSS expenses. The CUO section documents when a "DFA 285-C" is given to the PS household.

PAGE 12

- o New Item 43/Old Item 40: Narrative for AFDC special need status is changed.
- o New Item 44/Old Item 41: Narratives and formatting are changed in the social services sections: "Child Health and Disability Prevention Program (CHDP)" (new item 44A); "WIC" (new items 44B and C); and Family Planning Services (new item 44D).
- o CERTIFICATION SECTION:

The section is changed to a two-column format; information is resequenced; and cash aid penalties and food stamp penalties are stated separately.
Narrative regarding IPV's for FS and AFDC is updated.
In column two the first sentence in the fourth bullet is changed to add "and full Medi-Cal" and the final bullet adds narrative for FS regarding fleeing felons and parole/probation violators.

PAGE 13

- o The "REGULATIONS MET?" section: "Citizenship/Alien" is changed to "Citizen/non-citizen" [status]. The following items are added to the grid: "Pregnancy verified/WIC referral," "ABAWDs," "Referred for Health Care Options (HCO) Presentation (Managed Care)," and "Incapacity MAP Exemption."
- o The table documenting AFDC case status adds checkboxes for "Redetermination," "Selects CAAP [California Alternative Assistance Payment]," and "MAP Exemption."
- o The "FOOD STAMP TESTS" section is reformatted.