

Kansas Department of Social and Rehabilitation Services
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MEMORANDUM

TO: EES Field Administrators
Regional Directors
EES Central Office
HealthWave Clearinghouse

Date: May 9, 2008

From: Bobbi Mariani

Andy Allison

RE: Implementation Instructions for TAF
Earned Income Disregard - FINAL

Description and Reason for Proposed Policy Change:

The TAF Work Incentive Enhancement is an increase of the TAF earnings disregard from 40% to 60% for low income families. It will provide transitional assistance when a family member gains employment in the form of a reduced benefit for the first several months of employment.

Research has shown the first six months of successful employment is critical to job retention. The continued TAF benefit along with the earnings disregard will provide an incentive to maintain employment. Once full time employment is reached most families lose TAF assistance and cannot be counted in the Work Participation rate. The Deficit Reduction Act of 2005 mandates that all states meet work participation rates. Current processes limit our ability to count employment successes in the work participation rate. This revision will benefit both the TAF customer and the State of Kansas.

We are not meeting the participation rate of 50% because we have been successful in moving families off cash assistance. By helping families transition successfully off of the TAF program, we can include those successes in the participation rate. The Work Incentive will help meet the required work participation rate.

Implementation Instructions:

The Work Incentive Enhancement policy will be incorporated in KEESM revision 35, effective 5/1/08.

Applications – The new policy is effective for applications processed for the benefit month of May 2008.

Ongoing cases – The following provides implementation information for ongoing cases:

Prior to rollover in March, the TAF Calculation table will be changed to reflect an earned income disregard of 60% instead of 40% for May 1, 2008. Then, effective with March rollover, TAF cases with earned income will be identified and automatically allowed the 60% disregard when the cases are processed for May. Mass Change notices will be mailed informing the customer of May 2008 changes. The Mass Change Detail report MR330 (SWM03828-B59) will be available on March 31, 2008 for review of any cases that fail to authorize.

Any change made for the TAF benefit month of May 2008 and subsequent months will receive the 60% disregard.

See Case Example 1 for an explanation of this process.

If the benefit month in KAECSSES is greater than May 2008, staff will need to manually re-process May 2008 benefits after March 28th, 2008. If this occurs, wording on the notice might include the following: "This increase in your cash benefit may be the result of an increase in the earnings disregard effective May 1, 2008".

There will be an impact on the child care program and the food stamp program:

As families remain eligible for TAF benefits for a longer period of time, they will also remain eligible for JO Child Care.

Food Stamp benefits will decrease as the TAF benefit increases and continues. Generally, a \$3.00 increase in income will reduce Food Stamp benefits by \$1.00. For example, a \$30.00 TAF increase will decrease Food Stamps by \$10.00.

MEDICAL IMPACT

The increased earned income disregard will not be applicable for the Caretaker Medical program. For MA CM, the disregard will remain 40%. Prior to implementation of the 60% disregard, MA CM and TAF financial eligibility policies have been aligned to ensure that cases eligible for TAF were also eligible for MA CM. Beginning with determinations for the benefit month of May 2008, a TAF approval will no longer satisfy the medical assistance financial eligibility requirements for cases with earned income.

Because a TAF financial determination has been used to satisfy the financial requirements of MA CM, staff have not been required to complete a separate determination for MA CM when an individual was found eligible for TAF. In addition, a new MA CM determination has not been necessary for ongoing Clearinghouse (CH) cases for individuals who continue to receive TAF. In most situations, families who are eligible for TAF assistance will also be eligible for MA CM. However, beginning with the benefit month of May 2008 a separate MA CM determination must be completed for cases with earned income.

In addition, policy which establishes TransMed and Extended Medical eligibility are also being modified. Current policy allows a customer to receive TransMed coverage when earnings exceed MACM/TAF standards (or Extended Medical when child or spousal support exceeds MACM/TAF

standards) and there is a household member who has received MACM or TAF in three of the last six months. Effective with benefit month May 2008, TransMed and Extended Medical may only be established if a household member has received MACM in three of the last six months. The Clearinghouse is responsible for processing all TransMed and Extended Medical cases. While SRS staff are not responsible for determining eligibility for these programs, it is necessary to identify the potential for TransMed when MACM eligibility is denied for excess income. The potential for TransMed exists if a household exceeds MACM due to earnings and includes at least one household member who has received MACM in three of the last six months. See Attachment D: TransMed desk guide for additional information about the TransMed program.

A. MA CM FOR CASES WITH TAF

A request for TAF is still considered a request for medical. Current TAF recipients with no income or unearned income only continue to meet financial eligibility criteria for MA CM. Current policy and processes, as outlined in KHPA Policy Memo 2008-02-01 continue to apply. However, for cases with earned income, TAF recipients do not automatically qualify for MACM coverage.

This change will require staff to complete a separate determination for MA CM coverage for all TAF approvals with earnings.

Eligibility for MACM continues to be determined off-KAECSES using a Microsoft Excel document that calculates eligibility using the 40% disregard.

The MACM electronic worksheet is the tool that is used to calculate eligibility for MACM coverage. As a way to simplify the process of reporting changes to the HealthWave Clearinghouse, a new tool has been created that combines the MACM electronic worksheet with a report form to notify the Clearinghouse staff of the type of change that has occurred.

The MACM electronic worksheet is available in the KEESM appendix as item W-6. The new tool, the TAF Change Form is available in the KEESM appendix as item W-11 with instructions found at W-11A.

Important: Every application must be reviewed for prior medical requests. Applicants must be notified of the outcome of their request for prior medical assistance, whether approved or denied. Eligibility for MACM in a prior medical month allows the use of the 40% earnings disregard for the remaining prior medical months and the application month.

B. COMMUNICATION BETWEEN SRS STAFF AND THE CLEARINGHOUSE

Since a request for TAF is a request for medical, but TAF eligibility no longer automatically meets the financial requirements of MACM, communication between local SRS staff and the Clearinghouse is more important than ever.

Both SRS and the Clearinghouse may be requesting the same or similar information from the customer to process different requests. If information is provided to one agency, it shall be copied and forwarded to the other agency if the customer requests this.

Some changes previously reported on the HW-Info form will now be reported on the TAF Change Form. These include:

- TAF case opening (including reinstatements)
- TAF review completed
- TAF case closing
- Add Person/Remove Person – which is defined on the new form as ‘Household Change’

With this policy change, there are additional TAF changes which must be reported to the Clearinghouse. These include:

- Change in Income
- Potential TransMed

Only the top portion of the TAF Change form will be completed if there is no income or if only unearned income is being budgeted for TAF. Both the top & bottom portions of the TAF Change form will be completed when earned income is being considered. If the earnings are different from one month to another, separate TAF Change forms will be needed for each month. Please specify the month of eligibility on the TAF Change Form.

If it is later discovered that a customer was approved for TAF but medical assistance was not considered, the medical must be processed immediately.

C. TAF APPLICATIONS

The 40% earnings disregard will only apply to medical applicants with earnings who have also correctly received MA CM in one of the last four months. When a TAF application is received by SRS, the following procedures are applicable to the MA CM determination, depending on the presence of an open medical case at the Clearinghouse.

1. TAF Application with open medical at the CH:

SRS Staff actions:*

- SRS staff do not process the MACM request if a medical case is already open at the Clearinghouse.
- Send a copy of the entire application with all supporting documentation to the Clearinghouse within 5 business days from the application date
- Complete the TAF Change Form and attach this to the copied application.
- If income has been provided, complete the worksheet portion of the form.
- If income is not yet known, the worksheet portion of the form is not required.
- Email the form to the Clearinghouse at HW-Info@khpas.gov
- Complete the TAF determination.
- Update the TAF Change Form with the income if TAF application is approved.
- Email updated form for TAF approvals to the Clearinghouse at HW-Info@khpas.gov within 5 business days of the TAF determination.

*With the exception of the income worksheet (bullet number 4) there is no change to the current policy and procedure. (Instructions included in KEESM Implementation memo, July 2006)

Clearinghouse Staff actions:

- Identify impact on medical program.
- Impacts might include a change in household members, change in income, or address.
- Eligibility may be determined with income provided directly by the customer with the income reported on the TAF Change Form depending on when the actions occur.
- Do not hold the application while waiting for the results of the TAF determination. Proceed with processing following standard application procedures.

See Case Examples 2 and 3 for guidance on the variety of situations which occur when processing a TAF application with an open medical case at the Clearinghouse.

2. TAF Application with no open medical:

- Complete the TAF determination.
- Complete the TAF Change Form with the income used (no requirement to attach income verification) for the TAF determination.
- Consider request for prior medical assistance.
- If eligible for MACM, approve coverage on a separate case number.
- If ineligible for MACM, determine eligibility for MP or MA Spenddown and then determine if a potential for TransMed eligibility exists. To determine a potential for TransMed:
 - SRS staff shall research KAECSES to determine if a household member has received MA CM in three of the last six months.
 - If yes,
 - Send a copy of the entire application and all supporting documentation to the Clearinghouse with the completed TAF Change Form attached.
 - Email the TAF Change Form to the Clearinghouse at HW-Info@khpa.ks.gov
- CARC and transfer the case file to the Clearinghouse. Attach the Transfer Check-list.

See Case Examples 4, 5, and 6 for guidance on the variety of situations which occur when processing a TAF application with no open medical case at the Clearinghouse.

Note: It is critical when sending a potential TransMed application to the Clearinghouse for review that it is sent separately from any case file being transferred to the Clearinghouse. For instance, MP may be approved at the same time SRS staff determine there is a potential for TransMed. The case file transfer and the TAF Change Form identifying the potential MAWT must be routed to the Clearinghouse separately. The simplest method to ensure this separation is to send the TAF Change Form to the Clearinghouse via e-mail to HW-Info@khpa.ks.gov and transfer the MP file through standard methods.

D. TAF REVIEWS:

The 40% earnings disregard applies only to recipients with reported earnings who have also correctly received MA CM in one of the last four months. At the time of the TAF review, medical assistance

may be open under MA CM, MA WT, MP, or the family may have no coverage at all. When a TAF review is received by SRS, the following procedures are applicable to the MA CM determination, depending on the presence of an open medical case at the Clearinghouse.

1. TAF Review with open medical at the CH:

SRS Staff actions:

- Complete the TAF determination.
- Complete the TAF Change Form with the income used for the TAF determination.
- Regardless of the outcome of the worksheet, email the form to the Clearinghouse at HW-Info@khpas.gov
- It is not necessary to attach income verification.

Clearinghouse staff actions upon receipt of the TAF Change Form:

- If recipient is eligible for MA CM, authorize coverage for an additional 12 months.
- If recipient exceeds MA CM income guidelines, determine eligibility for TransMed.
- If ineligible for TransMed, determine eligibility for MP.

See Case Example 7 for an example which may occur when processing a TAF review with an open medical case at the Clearinghouse.

2. TAF Review with no open medical:

- Complete the TAF determination.
- Complete the TAF Change Form with the income used (no requirement to attach income verification) for the TAF determination.
- Consider a request for prior medical assistance.
- If eligible for MACM, approve coverage on a separate case number.
- If ineligible for MACM, determine eligibility for MP or MA Spenddown and then determine if a potential for TransMed eligibility exists. To determine a potential for TransMed:
 - SRS staff shall research KAECSSES to determine if a household member has received MA CM in three of the last six months.
 - If yes,
 - Send a copy of the entire application and all supporting documentation to the Clearinghouse with the completed TAF Change Form attached.
 - Email the TAF Change Form to the Clearinghouse at HW-Info@khpas.gov
- CARC and transfer the case file to the Clearinghouse. Attach the Transfer Check-list.

See Case Example 8 for an example which may occur when processing a TAF review with no open medical case at the Clearinghouse.

E. REPORTING CHANGES

Changes reported for TAF may also impact the open medical case maintained at the Clearinghouse. The HW-Info form will continue to be the tool used to report changes, other than those listed on the TAF Change Form as outlined above.

All changes continue to be reported to the Clearinghouse by e-mailing the appropriate form to HW-Info@khpas.gov

1. CHANGE IN INCOME: The 40% earnings disregard applies to recipients with earnings who report a change in the amount of income. Change in income on a TAF program will only affect medical coverage if the family is open on the MACM program.

SRS Staff actions:

- Research KAECSES to determine if any medical programs are open at the Clearinghouse.
- If open MACM, complete the TAF Change Form with the new income reported.
 - If the recipient exceeds MA CM income guidelines, email the form to HW-Info@khpas.gov
- Send the form to the Clearinghouse when the following occurs:
 - There is an open MACM
 - New income exceeds MACM income guidelines

Clearinghouse staff actions:

- Determine eligibility for TransMed.

See Case Example 9 for an example which may occur when a change in income is reported.

2. HOUSEHOLD CHANGE: When a household change occurs for a family who has reported earnings, the change must be reviewed for the impact on medical coverage. Household changes may affect who is eligible to receive coverage, the need standard applied by a change to the county of residence, shared/non-shared living arrangement or by bringing in additional household income.

SRS Staff actions:

- Research KAECSES to determine if any medical programs are open at the Clearinghouse.
- If open MACM, complete the TAF Change Form with the new household change reported.
- Email the form to HW-Info@khpas.gov

Clearinghouse staff actions:

- Determine eligibility for TransMed,
- Remove applicable person who is no longer residing in the home, or
- Add applicable person who has been added to the TAF program.

See Case Example 10 for an example which may occur when a household change is reported.

F. MACM PROCESSING AT THE CLEARINGHOUSE

The 40% earnings disregard will only apply to medical applicants with earnings who have also correctly received MA CM in one of the last four months.

When a TAF case exists, the income used in the TAF determination, as documented on KAECSES screen AFNN shall be used to determine MACM eligibility. If the applicant has provided additional income with the application, this shall only be used if it appears to differ from that which was reported for TAF. In addition, income provided by the applicant shall also be used to determine ongoing MACM eligibility if the reported income represents a change.

If eligible for MACM based on a TAF determination, MACM coverage shall be provided retroactively to the first month of TAF eligibility. The review period shall be established for twelve months from the first TAF month.

G. CHANGES TO TRANSMED AND EXTENDED MED

Prior to implementing this change, TransMed and Extended Med eligibility has been based on the receipt of TAF or MACM in the last six months. With this policy change, TAF months will no longer establish TransMed and Extended Med eligibility. The customer must have three MACM months in the last six months to qualify for these programs.

TransMed has also been viewed as a transitional program that assists customers by providing medical coverage as they transition off of cash assistance. However, with the implementation of this policy change, the TransMed program will be only for individuals transitioning off of MA CM coverage. Customers may be on TransMed and TAF simultaneously.

H. NOTICE REQUIREMENTS

No new KAECSES notices have been identified as a result of this policy change.

Reminder: Appropriate notices are required for all case actions. For example, when denying the MACM program, a separate MACM denial is required. This is the expectation even if TAF is also being denied, or MP is being approved.

I. CLOSING

The addition of the citizenship and identity requirement in July 2006 for MACM recipients was the first time TAF recipients were not automatically eligible for MACM. This was a significant transition for staff and customers as all were accustomed to cash and medical benefits being received simultaneously. The work incentive change further emphasizes the difference in the TAF and MACM program rules. TAF recipients are not guaranteed medical coverage, and also may not receive the transitional medical coverage that has historically been given as a support to those losing TAF assistance due to earnings. It is important to understand these philosophical shifts in order to provide the necessary education to TAF recipients as they adjust to this policy change.

It is our goal to implement this change smoothly with a relatively high degree of accuracy. To do so will require ongoing communication between SRS staff making TAF determinations and the HealthWave Clearinghouse responsible for the medical determinations. Communication between SRS staff and Clearinghouse staff is encouraged to improve accurate and prompt benefit delivery.

If you have any questions about the material included in this memo, please contact:

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Or

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Questions regarding any KAECSES issues are directed to the SRS Business Help Desk at helpdeskbusiness@srs.ks.gov.

Attachments:

Attachment A: Case Examples

Attachment B: Instructions for completing the TAF Change Form

Attachment C: TAF Change Form (separate Excel file)

Attachment D: TransMed desk guide (separate Word file)

Attachment E: SRS Desk Guide for TAF Applications with open medical (separate Word file)

Attachment F: SRS Desk Guide for TAF Reviews with open medical (separate Word file)

Attachment G: SRS Desk Guide for TAF Applications and Reviews with no medical (separate Word file)

Attachment H: SRS Desk Guide for TAF cases with a change in income (separate Word file)

Attachment I: SRS Desk Guide for TAF cases with a change in household (separate Word file)

Attachment A: Case Examples

The following case examples further demonstrate the policy and its impact on TAF and MACM case processing. These examples are not just applicable to implementation of the policy, but also include situations which may occur as we see the further separation of TAF and MACM programs.

		Scenario	TAF Processing	Medical Processing	Notes
1	Cash benefit increased	Ongoing Case, open TAF with Existing Earnings: Individual is employed part time and has been receiving TANF assistance for several months.	Rollover occurs on 3/28/08, and cash assistance grant increases. A mass change notice is sent by the system automatically. No further action is required from the case manager.	No impact on medical.	

		Scenario	TAF Processing	Medical Processing	Notes
2	TAF Denied, MACM Continues	<p>TAF Applicant, open MACM: A household with dad and one child. They have received MACM, but not TAF for the last four months. Dad is employed and earns \$135 weekly.</p> <p>$\\$135 \times 4.3 = \\$580.50$.</p>	<p>He is not allowed the 60% earnings disregard (has not been on TAF within the last 4 months). $(\\$580.50 - \\$90.00 = \\$490.50)$</p> <p>A household of 2 would not be eligible for TAF assistance.</p>	<p>SRS staff will send a copy of the application with all supporting documentation to the CH. Since income was known, the complete TAF Change form is completed and attached to the application.</p> <p>CH staff will review the application and attached form to determine if any changes are required to the ongoing MACM coverage.</p> <p>He is allowed the 40% earnings disregard. $(\\$580.50 - \\$90.00 = \\$490.50 \times 40\% (196.20) = \\$294.30 \text{ net})$ A household of 2 would be eligible for MACM assistance.</p>	

		Scenario	TAF Processing	Medical Processing	Notes
3	TAF Approved, MACM approved, MP closed	<p>TAF Applicant, open MP: A household with mom and one child apply for TAF. They have an open MP at the Clearinghouse.</p> <p>Application reports child support in the amount of \$175 per month. Verification not provided.</p>	<p>TAF worker is unable to verify child support income through local resources. Requests verification of income.</p> <p>Income verification received.</p> <p>Gross child support income of \$175.</p> <p>A household of 2 would be eligible for TAF assistance.</p> <p>Following TAF approval, SRS staff update the TAF Change Form and submit to the CH.</p>	<p>SRS complete the TAF change form (minus the worksheet as income not initially provided) and attach it to the application. Application sent to the Clearinghouse.</p> <p>The TAF application is still pending, so Clearinghouse staff requests income verification.</p> <p>Verification is received. There is gross child support income of \$175.</p> <p>A household of 2 would be eligible for MACM assistance.</p> <p>MP closed, MACM opened.</p>	

		Scenario	TAF Processing	Medical Processing	Notes
4	TAF Denied, MACM Denied, MP Approved	<p>TAF Applicant, no open med: A household with mom and two children. They have not received TAF in the last 4 months or MACM assistance in the last 6 months. There is no other open medical coverage. Mom is employed 30 hours a week at \$6.50 hour, and is paid weekly.</p> <p>30 X \$6.5 X 4.3 = 838.50.</p>	<p>She is not allowed the 60% (has not been on cash assistance within the last 4 months).</p> <p>Her net income is \$748.50, and is therefore not eligible for TAF assistance.</p>	<p>She is not allowed the 40% (has not been on MACM assistance within the last 4 months).</p> <p>Her net income is \$748.50, and is therefore not eligible for MACM assistance. SRS staff deny MACM.</p> <p>Eligibility must then be determined for MP for the two children.</p> <p>(\$838.50 - \$200 = 738.50 net)</p> <p>A household of 3 would be eligible for MP assistance. SRS staff approved MP.</p> <p>SRS staff determined there is no potential eligibility for MAWT.</p> <p>SRS staff CARC and transfer the case file to the Clearinghouse.</p>	

		Scenario	TAF Processing	Medical Processing	Notes
5	TAF Approved, MACM Denied, MP Approved	<p>TAF Applicant, no open med: A household with mom, dad, and two children. They have received TAF but not MACM in the last four months (denied due to failure to provide citizenship & identity). In addition, MACM has also not been received at all in the last six months.</p> <p>Dad is employed 30 hours a week at \$7.00 hour and is paid weekly.</p> <p>$30 \times \\$7 \times 4.3 = 903.00$.</p>	<p>He is allowed the 60% earnings disregard.</p> <p>$(\\$903 - \\$90.00 = \\$813.00 \times 60\%(\\$487.80) = \\$325.20 \text{ net})$</p> <p>A household of 4 would be eligible for TAF assistance.</p>	<p>He is not allowed the 40% earnings disregard (has not been on MACM within the last 4 months). $(\\$903 - \\$90.00 = 813.00 \text{ net})$</p> <p>A household of 4 would not be eligible for MACM assistance. SRS staff deny MACM.</p> <p>Eligibility must then be determined for MP for the two children. $(\\$903 - \\$200 = 703.00 \text{ net})$</p> <p>A household of 4 would be eligible for MP assistance. SRS staff approve MP.</p> <p>SRS staff determined there is no potential eligibility for MAWT.</p> <p>SRS staff CARC and transfer the case file to the Clearinghouse.</p>	

		Scenario	TAF Processing	Medical Processing	Notes
6	TAF Denial, MACM Denied, MP Denied	<p>TAF Applicant, no open med: A household with mom, dad and one child. They have not received TAF or MACM in the last four months. Dad is employed and earns \$175 weekly.</p> <p>\$175 x 4.3 = \$752.50.</p>	<p>He is not allowed the 60% earnings disregard. (has not been on cash assistance within the last 4 months).</p> <p>(\$752.50 - \$90.00 = \$662.50)</p> <p>His net income is \$662.50 and is therefore the family is not eligible for TAF assistance.</p>	<p>He is not allowed the 40% earnings disregard. (Has not been on MACM within the last 4 months).</p> <p>(\$752.50 - \$90.00 = \$662.50)</p> <p>A household of 3 would not be eligible for MACM assistance. SRS staff deny MACM.</p> <p>SRS staff determined there is no potential eligibility for MAWT.</p> <p>Eligibility must then be determined for MP. (\$752.50 - \$200 = \$552.50 net)</p> <p>The child's citizenship has not been verified. The child is not eligible for MP assistance. SRS staff deny MP.</p>	

		Scenario	TAF Processing	Medical Processing	Notes
7	TAF Review approved, MACM denied, MP continues	<p>TAF Review, open MP: A household with mom, dad and two children. There has been no MACM in the last four months (denied due to citizenship & identity). Dad is employed and earns \$200 weekly.</p> <p>\$200 x 4.3 = \$860.00</p>	<p>He is allowed the 60% earnings disregard. (\$860.00 - \$90.00 = \$770.00 x 60% (\$462.00) = \$308.00 net)</p> <p>A household of 4 would be eligible for TAF assistance.</p>	<p>He is not allowed the 40% earnings disregard. (Has not been on MACM within the last 4 months).</p> <p>(\$860.00 - \$90.00 = \$770.00) A household of 4 would not be eligible for MACM assistance.</p> <p>SRS staff completes the TAF Change Form and email to the Clearinghouse.</p> <p>CH staff deny the MACM program for the mom and dad and reduce the premium if applicable.</p>	

		Scenario	TAF Processing	Medical Processing	Notes
8	TAF Review , MACM approved then closed, MP approved	<p>TAF Review, no open med: A household with mom and one child. MACM was open in the first of the last four months. Mom is employed and earns \$210 weekly.</p> <p>\$210 x 4.3 = \$903.00</p>	<p>She is allowed the 60% earnings disregard. (\$903.00 - \$90.00 = \$813.00 x 60% (\$487.80) = \$325.20 net)</p> <p>A household of 2 would be eligible for TAF assistance.</p>	<p>She is allowed the 40% earnings disregard. (\$903.00 - \$90.00 = \$813.00 x 40% (325.20) = 487.80 net) A household of 2 would not be eligible for MACM assistance.</p> <p>However, since this is a TAF review, it is worth checking why the PI wasn't already open on MACM. The PRAP screen shows an IM code for the PI, so it appears to be an error that the PI is not open on MACM.</p> <p>SRS staff determine that this is the first month the earnings increased to \$210 per week. Using the income prior to the increase, the household is eligible for MACM in the last three. Based on the approval of these 3 MACM months, the customer now has the potential for MAWT eligibility.</p> <p>SRS staff open MACM for 3 months, close MACM for excess earnings, and open MP for the child. SRS staff complete the TAF Change form and attach to a copy of the application. The case is CARC'd and the file transferred to the Clearinghouse.</p> <p>CH staff determine eligibility for MAWT.</p>	

		Scenario	TAF Processing	Medical Processing	Notes
9	TAF Continued, MACM Closed, potential MAWT	<p>Income Change, open TAF and MACM: A household with Mom and 2 children are open on TAF. They have an open MACM case at the Clearinghouse. She reports in April employment of 30 hours a week, at \$6.50 an hour. She is paid weekly.</p> <p>30 hrs X \$6.50 hr X 4.3 = \$838.50</p>	<p>She is allowed the 60% earnings disregard.</p> <p>$(\\$838.50 - \\$90.00 = \\$748.50 \times 60\%(\\$449.10) = \\$299.40 \text{ net.}$</p> <p>A household of 3 would be eligible for cash assistance.</p>	<p>She is allowed the 40% earnings disregard.</p> <p>$(\\$838.50 - \\$90.00 = \\$748.50 \times 40\%(\\$299.40) = \\$449.10 \text{ net.}$</p> <p>A household of 3 would not be eligible for MACM assistance.</p> <p>SRS staff will complete the TAF Change Form and email to the Clearinghouse. CH staff will determine eligibility for MA WT.</p>	
10	TAF Approved, MA CM Closed, no MA WT	<p>Household Change: A household with mom and three kids have been open on TAF and MACM for one month. The mom has earnings of \$190 per week. $\\$190.00 \times 4.3 = \\817.00</p> <p>The mom reports to her TAF worker that one of her children has left the home, reducing the household size to 3.</p>	<p>She is allowed the 60% earnings disregard.</p> <p>$(\\$817 - \\$90.00 = \\$727.00 \times 60\%(\\$436.20) = \\$290.80 \text{ net)}$</p> <p>A household of 3 would be eligible for TAF assistance.</p>	<p>She is allowed the 40% earnings disregard.</p> <p>$(\\$817 - \\$90.00 = \\$727.00 \times 40\%(\\$290.80) = \\$436.20 \text{ net)}$</p> <p>A household of 3 would not be eligible for MACM assistance.</p> <p>SRS staff completes the TAF Change Form.</p> <p>Upon receipt of the form, CH staff will close the MACM and determine eligibility for MP.</p>	

Attachment B: Instructions for the TAF Change Form

The TAF Change Form can be found in the KEESM Appendix, form W-11. The form is a Microsoft Excel file. When prompted to save the file, save it to your personal drive or to your Desktop. Use Tab or Shift/Tab to navigate between fields on the form. Do not use the Enter or Return keys. The only fields enterable are those where data may be input. These fields are highlighted in yellow.

The TAF Change Form has multiple purposes. These include:

- Calculation of MACM financial eligibility
- Notification of Clearinghouse staff when changes made to the TAF case

The following instructions provide detailed information about each of the fields included on the form:

- **Date** – Enter the date the form is being completed
- **Sent to CH** – Place an 'X' in the box if the form is sent to the Clearinghouse. There will be times that the form is completed to determine MACM eligibility but it is not required to be sent to the Clearinghouse. The form may be placed in the SRS file as documentation of the MACM income determination.
- **Worker Name** – The name of the worker completing the form.
- **Casehead Name** – Can be copied and pasted from KAECSES
- **SRS Case #** - Can be copied and pasted from KAECSES
- **CH Case #** - Can be copied and pasted from KAECSES
- **MP, MACM, MAWT, No Med** – Place an 'X' in the appropriate box based on what type of medical coverage is open at the Clearinghouse. Place an 'X' in the 'No Med' checkbox when there are no open medical programs.
- **TAF Application** – Place an 'X' in this box when a TAF application is received and the Clearinghouse has an open medical program. The form shall be completed with the income used in the TAF determination, if known, and attached to the TAF application with all supporting documents. The application is then mailed to the Clearinghouse within 5 business days of receipt.
- **TAF Review** – Place an 'X' in this box when a TAF review is processed. The form must be sent to the Clearinghouse for every TAF review completed.
- **TAF Closure** – Place an 'X' in this box when the form has been completed as the result of a TAF Closure, regardless of the reason for closure.

- **Change in Income** – Place an ‘X’ in this box when an income change has been processed. The form shall then be sent to the Clearinghouse if the income exceeds MACM guidelines.
- **Household Change** – Place an ‘X’ in this box when a household change occurs. Examples include adding or removing a TAF household member or a change in the shelter group as the result of an address change.
- **Potential TransMed** – Place an ‘X’ in this box when the household exceeds MACM income guidelines and a household member has received MACM in three of the last six months.
- **No income reported** – Place an ‘X’ in this box when the household has zero income. This is intended to explain a blank worksheet.
- **Benefit Month** – Enter the month that this income information applies to. A separate form will be required when the income differs from one month to the next.

MACM Income Calculations

1. Calculations will be completed as soon as data is entered. Although the table is set up to accommodate 2 wage earners, it will compute without information on the second wage earner.
2. Question regarding MACM history – Enter ‘1’ if the wage earner has received MACM in one of the prior four months. Enter ‘0’ if the wage earner has not. Do not use a Y or N to answer this question.
3. Income – Enter the earned income, child support, and other unearned income as applicable.
4. Enter the appropriate Payment Standard as instructed in KEESM 7411.
5. If the client is eligible for MA-CM, a positive number will result in the Adjusted Need field. If the result is a negative number, there is no eligibility and the client is not eligible for MA-CM. **Positive is good – Negative is bad.**