

CalWORKs Program Guide Letter No. 307

Subject INCOME REPORTING THRESHOLD (IRT) – UPDATES FOR FEDERAL FISCAL YEAR (FFY) 2013-14

Reference All County Letters (ACLs) 12-25; 13-80; and 13-109

Effective Date October 1, 2013 – February 28, 2014
NOTE: There will be another IRT update effective March 1, 2014 due to the upcoming 5% increase in Maximum Aid Payment (MAP) levels.

Purpose To issue the FFY 2013-14 CalWORKs IRT chart and provide clarification regarding the Annual Reporting/Child Only (AR/CO) IRT

Background Each year the California Department of Social Services (CDSS) issues an updated IRT chart for the upcoming Federal Fiscal Year (FFY).

A new three-tiered IRT system was implemented October 1, 2012 for CalWORKs AR/CO Assistance Units (AUs). Under this system, recipients may remain eligible to CalWORKs even when their income exceeds the IRT.

With the implementation of Semi-Annual Reporting (SAR), the same three-tiered IRT system is now used for **all** CalWORKs AUs.

Policy Change The IRT values issued in this Letter are effective **October 1, 2013**. The IRT level **previously** sent to the AU will be used for mandatory reporting purposes and as a basis for establishing overpayments (OPs) until the AU is notified of their new IRT.

IRT rules for AR/CO and SAR are identical. CalWORKs AUs are only required to report within 10 days when they receive earned income **and** their total household monthly gross income (earned and unearned) exceeds the IRT for their AU size.

AUs with **only** unearned income are **not** required to report mid-year (AR/CO) or mid-period (SAR) when that income, by itself, exceeds their IRT. CalWORKs may not be decreased or discontinued mid-year (or mid-period) due to a voluntary report of unearned income over IRT.

Summary of Updates

The following sections have been updated in the online CalWORKs Program Guide (CPG):

CPG Section	Updates
44-260.D	Updated existing AR/CO information to include references to SAR and clarify that the IRT rules for AR/CO and SAR are identical.
44-260.E	
44-300.G	Added current IRT information for FFY 2013-14.
45-200	Updated the Assistance Standards Chart to reflect IRT values for FFY 2013-14. Added a new CalWORKs IRT Chart desk aid for FFY 2013-14 to replace the IRT chart for FFY 2012-13 that was issued during initial SAR Training.

Changes to the CPG are noted with **highlighted text**.

Automation Impact

Reference tables for the CalWORKs IRT were updated in CalWIN Production on December 7, 2013.

The CalWORKs Scratch Budget has been updated to reflect the FFY 2013-14 IRT values.

Program Impact

CALFRESH PROGRAM

For Public Assistance CalFresh (PACF) households, the HSS will also recalculate the CalFresh benefit amount mid-period when CalWORKs eligibility is reevaluated due to income exceeding the CalWORKs IRT.

For Non-Assistance CalFresh (NACF) households, the IRT for CalFresh is 130% of the Federal Poverty Level (FPL), per [CalFresh Program Guide Letter \(CFPG\) #587 Addendum A](#).

OTHER PROGRAMS

There is no impact to other programs.

Document Capture and Forms Impact

County Policy requires any manually-generated notice to be submitted for document capture. This Policy applies when the following IRT notices are generated outside of CalWIN:

- **Reporting Changes for CalWORKs and CalFresh (AR 2 or AR 2 SAR);** or
- **Reporting Changes for Cash Aid and CalFresh (SAR 2)**

**Quality
Control (QC)
Impact**

QC will cite the appropriate error when instructions in this material are not followed or are followed incorrectly.

**Director
Approval**

Rick Wanne, 1-21-14

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