

## 90-500.4. SPECIAL BUDGETING SITUATIONS

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### A. General

This section provides instructions for specific special budget situations in the GR Program.

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### B. Aid through First Payday

#### 1. *Policy*

GR payments may be made on an Aid through First Payday basis when the applicant/recipient:

- has acquired verified employment or paid training that is expected to provide for his/her ongoing needs
- does not have assets or income that would preclude eligibility under Chapters [90-300](#) and [90-400](#)
- does not fall under a sanction as defined in Section [90-700.19](#).

#### 2. *Verification*

The worker shall document the following information in the case record, after receiving verification from the employer of:

- name and address of employer
- beginning date of employment or training
- rate of pay and number of hours expected to work per pay period
- date of first payday and whether first pay is for a full or partial pay period.

This information is also needed for completion of Form 11-4 upon case closing.

#### 3. *Budgeting*

Aid shall be provided through the first payday by prorating needs based upon days eligible. If the first payday is for a partial pay period, additional aid may be granted only if the income received from the partial pay is insufficient to meet the applicant's/recipient's prorated needs from the date of receipt of the partial pay until his/her first full payday. In this situation, subtract the income received from his/her prorated needs and allow the difference, if any.

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### C. Aid through First Payday Example

Single applicant whose first payday will be July 25 and is found eligible on July 5.

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**90-500.4. SPECIAL BUDGETING SITUATIONS, Continued**

**Aid through First Payday Example**  
(continued)

Step	Action
1	\$303* - \$40 (medical in-kind) = \$263 (Basic Need Rate)
2	\$263/31 days in July = \$8.48 per day (prorated)
3	\$8.48 x 20 (July 5-July 25) = \$169 (prorated grant to first pay day)
Additional aid may be granted, if the first payday is for a partial pay period. If in the situation above, the recipient receives \$150 on July 25 for a partial pay period and the first full pay day will be on August 8, determine the recipient's prorated needs to the first full payday.	
4	\$8.48 x 7 (July 25-July 31) = \$59.36 (prorated needs for 7 days)
5	\$263/31 (days in August) = \$8.48 per day (prorated)
6	\$8.48 x 8 (August 1-August 8) = \$67.84 (prorated needs for 8 days)
7	\$59.36 + \$67.84 = \$127 (Total prorated needs to first full payday, July 25-August 8)
In this situation, the recipient's prorated needs (\$127) to the first full payday are less than the income received (\$169) from the partial pay period. No additional aid may be granted.	
<b>If the ...</b>	<b>Then subtract the ...</b>
prorated needs are more than the income received (example recipient received only \$100 on July 25),	income from the prorated needs to the first full payday and allow the difference, if any (\$127-\$100=\$27 will be issued in July).
client's net monthly income for August is anticipated to be less than Maximum Basic Need Rate,	net monthly income and the balance shall be the amount of aid authorized for the entire month.

\*Example based on grant amount effective February 1, 2014.

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**D. Transportation to Resource**

**1. Policy**

Pursuant to the standards of residency established by the Board of Supervisors, GR funds cannot be used to return transients to a previous residence. County residency is required.

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## 90-500.4. SPECIAL BUDGETING SITUATIONS, Continued

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### Transportation to Resource (continued)

When an applicant is determined eligible for Transportation to Resource, the least expensive mode of transportation available must normally be used. Exception to this policy may be made only with the written approval of the FRC Manager. Such exception might be made for a minor child, a pregnant woman, a severely disabled person, etc.

Based on a County Counsel decision, Transportation to Resource shall not be provided to any person unless he/she meets all of the following qualifications:

- Is capable of giving, and does give, a knowing and understanding consent to travel to the intended destination.
- Is physically and mentally capable of traveling alone, or will be adequately supervised during such travel and will be cared for at the point of destination.

The fact that an applicant has previously been provided Transportation to Resource is not cause to deny an applicant for GR. However, no subsequent authorization for Transportation to Resource shall be made unless approved by the FRC Manager or Assistant Manager.

### 2. *Eligibility*

Transportation to Resource shall be authorized only when the applicant meets all eligibility requirements (with the exception of Substance Abuse Services) for GR without approval of a Waiver Request.

Employable Transportation to Resource applicants must also meet Job Quit criteria and must not fall under a sanction.

### 3. *Procedures*

The worker must follow the actions in the table below for Transportation to Resource.

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**90-500.4. SPECIAL BUDGETING SITUATIONS,** Continued

**Transportation to Resource**  
(continued)

Step	Action								
	Request is made for Transportation to Resource during the interview.								
1	Investigate the potential for Transportation to Resource. This may include telephoning relatives or other responsible persons to determine if in fact a resource such as a job or housing is available. Other phone contact may involve calls to make arrangements to pick the applicant up at his/her destination or inquiring about other resources from family or friends.								
2	Complete GR Transportation to Resource Plan form 11-8 HHSA (excluding departure and arrival information). A lien shall also be completed showing the applicant's destination address.  Exception: If a parent of a minor child who is being provided transportation is not available for signature, neither the Statement of Facts nor the lien shall be required. Approval by the FRC Manager of the 11-8 HHSA shall serve as the authorization for payment of the GR funds.								
3	Seek approval of the Transportation to Resource from the FRC Manager.								
4	<table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: center;">If ...</th> <th style="text-align: center;">Then ...</th> </tr> </thead> <tbody> <tr> <td>transportation to Resource is not approved,</td> <td>discuss the following alternatives with the applicant.</td> </tr> <tr> <td>the applicant chooses to continue residence in San Diego County,</td> <td>evaluate for ongoing eligibility.</td> </tr> <tr> <td>the applicant does not intend to continue residence in San Diego County,</td> <td>deny the application.</td> </tr> </tbody> </table>	If ...	Then ...	transportation to Resource is not approved,	discuss the following alternatives with the applicant.	the applicant chooses to continue residence in San Diego County,	evaluate for ongoing eligibility.	the applicant does not intend to continue residence in San Diego County,	deny the application.
If ...	Then ...								
transportation to Resource is not approved,	discuss the following alternatives with the applicant.								
the applicant chooses to continue residence in San Diego County,	evaluate for ongoing eligibility.								
the applicant does not intend to continue residence in San Diego County,	deny the application.								
5	Upon receipt of an approved 11-8 HHSA, continue to Step 6.								
6	Request an immediate need warrant.								
7	Image the copy of form 11-8 HHSA in the case record.								
8	Upon receipt of the request for the immediate need warrant, the Immediate Need Clerk will issue the warrant.								

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**90-500.4. SPECIAL BUDGETING SITUATIONS, Continued**

**Transportation to Resource**  
(continued)

<b>Step</b>	<b>Action</b>
9	Open approved Transportation to Resource applications. The termination must also be entered at the same time.
10	Make checks payable to the transportation source (for example, airlines, train station, bus station, etc.) and the applicant (for example, meals and lodging) as necessary.
11	Immediate Need Clerk or worker will advise the applicant of the transportation arrangements so the applicant can pick up the checks in time to meet the scheduled time of departure.

**E. Sponsored Aliens**

**1. Evaluation of Sponsor's Income**

The sponsor's income at the time the sponsorship agreement was signed shall provide the basis for a Sponsored Alien Financial Eligibility (SAFE) test. Applicants/recipients who pass the SAFE test will be evaluated for deemed income from the sponsor. Applicants/recipients who fail the SAFE test shall be denied or discontinued from GR cash aid.

Note: The SAFE test shall be waived and no income shall be deemed when the sponsor's only income is CalWORKs, GR, or SSI/SSP.

**2. Sponsored Alien Financial Eligibility (SAFE) Test**

The sponsor's total adjusted net income from the tax year in which the sponsorship agreement was signed shall be compared with the total net income reported on the CW 22 to evaluate the change in the sponsor's needs.

<b>If the sponsor's needs have...</b>	<b>Then the ...</b>
not changed or decreased,	sponsored alien shall be ineligible to receive GR.
increased,	the worker shall determine the amount of the sponsor's income that is available to the sponsored alien.

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## 90-500.4. SPECIAL BUDGETING SITUATIONS, Continued

**Sponsored Aliens**  
(continued)

### 3. *Determining Deemed Income*

The sponsor shall be expected to contribute no less than the housing and utility portion of the sponsored alien's GR grant.

To determine the sponsored alien's deemed income, the CalWORKs County Use section of the CW 22 shall be completed. The Line L amount on the CW 22 shall be compared to the housing and utility portion of the sponsored alien's GR grant. Sponsors who have sponsored other aliens not on the GR case may require a second deeming computation. This computation is done only when all the aliens sponsored are in the three year period from the alien's date of entry. Form 11-63 HHS, Computation of Need and Notification of Payment for GR, items one to five under the grant determination column will be used when there are other sponsored aliens not in the GR household.

**F. Sponsored Alien Example 1**

There are four people in the GR household. Sponsor's family consists of three people. The sponsor is fully employed and earns \$736.10 per month.

Grant determination:

Item	Description	Amount
A	Sponsor Earned Income	736.10
B	Less 20% of A (not to exceed \$175)	147.22
C	Equals Total	588.88
D	Plus Sponsor Unearned Income	0
E	Equals Sub-total	588.88
F	Less MBSAC for Sponsor and Dependents (not including aliens)	1,424
G	Equals Sub-total	0
H	Less amounts paid by the sponsor for tax dependents living outside the household	0
I	Less sponsor's child/spousal support paid	0
J	Equals Sub-total	0
K	Number of Sponsored Aliens on GR	1
L	Divide J by K	0

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## 90-500.4. SPECIAL BUDGETING SITUATIONS, Continued

**Sponsored  
Alien Example  
1** (continued)

Amount arrived at in L shall be deemed the unearned income of each of the sponsored aliens.

Step	Action										
1	Determine the housing and utility portion of the sponsored alien's GR grant amount. <table border="1" data-bbox="548 604 1401 800"> <thead> <tr> <th>Item</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>No. of persons in household</td> <td>4</td> </tr> <tr> <td>Housing</td> <td>125</td> </tr> <tr> <td>Utilities</td> <td>23</td> </tr> <tr> <td>Total</td> <td>148</td> </tr> </tbody> </table>	Item	Amount	No. of persons in household	4	Housing	125	Utilities	23	Total	148
Item	Amount										
No. of persons in household	4										
Housing	125										
Utilities	23										
Total	148										
2	Compare the amount on line L of the computation above with the housing/utility portion of the sponsored alien's GR grant. The greater amount is counted as the sponsored alien's deemed income. The deemed income amount in this example is \$148.										

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**G.  
Sponsored  
Alien Example  
2**

Case situation:

- Sponsored Alien GR Household – 2 people.
- Sponsored Alien Housing and Utility - \$150 per month.
- Sponsor's Family – 5 people.
- MBSAC - \$1,626.
- Sponsor is receiving CalWORKs.
- Sponsor is receiving Child Support - \$300 per month.
- No spousal support.

Grant determination:

Item	Description	Amount
A	Sponsor Earned Income	0
B	Less 20% of A (not to exceed \$175)	0
C	Equals Total	0
D	Plus Sponsor Unearned Income	300

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**90-500.4. SPECIAL BUDGETING SITUATIONS, Continued**

**Sponsored Alien Example 2 (continued)**

Item	Description	Amount
E	Equals Sub-total	300
F	Less MBSAC for Sponsor and Dependents (not including aliens)	1,626
G	Equals Sub-total	0
H	Less amounts paid by the sponsor for tax dependents living outside the household	0
I	Less sponsor's child/spousal support paid	0
J	Equals Sub-total	0
K	Number of Sponsored Aliens on GR	1
L	Divide J by K	0
M	The housing & utility portion of the sponsored aliens grant	150
N	The greater of L, M, or Income Counted as Available to each Sponsored Alien is deducted from the GR grant amount	

No income shall be deemed when the sponsor is receiving CalWORKs.

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**H. Sponsored Alien Example 3**

Case situation:

- Sponsored Alien GR Household – 1 person
- Sponsor's Family – 4 people
- MBSAC for 4 = \$1,424
- Sponsor fully employed
- No other Unearned Income
- No Child/Spousal Support

Grant determination:

Item	Description	Amount
A	Sponsor Earned Income	1,200
B	Less 20% of A (not to exceed \$175)	175
C	Equals Total	1,025
D	Plus Sponsor Unearned Income	0

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## 90-500.4. SPECIAL BUDGETING SITUATIONS, Continued

### Sponsored Alien Example 3 (continued)

Item	Description	Amount
E	Equals Sub-total	1,025
F	Less MBSAC for Sponsor and Dependents (not including aliens)	1,424
G	Equals Sub-total	0
H	Less amounts paid by the sponsor for tax dependents living outside the household	0
I	Less sponsor's child/spousal support paid	0
J	Equals Sub-total	0
K	Number of Sponsored Aliens on GR	1
L	Divide J by K	0
M	The housing & utility portion of the sponsored aliens grant	197
N	The greater of L, M, or Income Counted as Available to each Sponsored Alien is deducted from the GR grant amount	

Since the sponsor has not sponsored any other person(s) not in the GR household, deduct \$197 from the GR grant.

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### I. Sponsored Alien Example 4

#### Case situation:

- Sponsored Alien GR Household – 3 persons
- Sponsored Alien Housing and Utility - \$142
- Sponsor's Family – 2 persons
- MBSAC = \$968
- Sponsor is fully employed – earns \$2,500 per month
- Child Support Paid - \$300 per month
- No Spousal Support
- No other Unearned Income

#### Grant determination:

Item	Description	Amount
A	Sponsor Earned Income	2,500
B	Less 20% of A (not to exceed \$175)	175

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## 90-500.4. SPECIAL BUDGETING SITUATIONS, Continued

**Sponsored  
Alien Example  
4 (continued)**

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Item	Description	Amount
C	Equals Total	2,325
D	Plus Sponsor Unearned Income	0
E	Equals Sub-total	2,325
F	Less MBSAC for Sponsor and Dependents (not including aliens)	968
G	Equals Sub-total	1,357
H	Less amounts paid by the sponsor for tax dependents living outside the household	0
I	Less sponsor's child/spousal support paid	300
J	Equals Sub-total	957
K	Number of Sponsored Aliens on GR	1
L	Divide J by K	957
M	The housing & utility portion of the sponsored aliens grant	142
N	The greater of L, M, or Income Counted as Available to each Sponsored Alien is deducted from the GR grant amount	

Applicant is not eligible to GR. Excess Sponsored Alien Deemed Income.

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