



CDSS

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DIRECTOR

STATE OF CALIFORNIA—HEALTH AND HUMAN SERVICES AGENCY  
**DEPARTMENT OF SOCIAL SERVICES**

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ARNOLD SCHWARZENEGGER  
GOVERNOR

October 1, 2009

ALL COUNTY LETTER NO. 09-55

TO: ALL COUNTY WELFARE DIRECTORS  
ALL CalWORKs PROGRAM SPECIALISTS  
ALL REFUGEE COORDINATORS  
ALL FOOD STAMP COORDINATORS  
ALL CONSORTIUM PROJECT MANAGERS

SUBJECT: CALIFORNIA WORK OPPORTUNITY AND RESPONSIBILITY TO KIDS  
(CalWORKs) INCOME REPORTING THRESHOLD (IRT) FOR  
QUARTERLY REPORTING/PROSPECTIVE BUDGETING (QR/PB)

REFERENCE: WELFARE AND INSTITUTIONS CODE SECTION 11265.3, MANUAL OF  
POLICIES AND PROCEDURES (MPP) SECTIONS 40-173.8,  
44-316.321 (e), 44-316.324, 69-201.4, 69-310 AND CalWORKs ACL NO's.  
07-35 and 08-61

REASON FOR THIS TRANSMITTAL

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

The purpose of this letter is to transmit the Fiscal Year 2009/2010 IRT chart for the CalWORKs Program. The California Department of Social Services (CDSS) developed the attached IRT chart to provide the County Welfare Departments (CWDs) with the IRT amounts to be used to meet the income reporting requirements in MPP Sections 44-316.321(e) and 44-316.324. These IRT levels are effective October 1, 2009.

**IRT Reporting Requirements**

Under the QR/PB reporting system, CalWORKs recipients are required to report only certain changes in their income or family circumstances mid-quarter. One such mandatory mid-quarter report is when the Assistance Unit's (AU) total income exceeds the IRT. The IRT is the greater of 130 percent of the Federal Poverty Level (FPL) for the number of persons whose needs are included in the determination of the cash aid amount, or the level at which an AU becomes financially ineligible. Income that must be reported for IRT purposes is the same income that is required to be reported for penalized, excluded, and timed out individuals and includes the income of persons not in the AU who were included

in the determination of income eligibility and grant amounts.

Note: AUs with either no income or with unearned income only are required to report if they receive new earned income that, when combined with other household income, exceed the IRT mid-quarter. AUs with unearned income only are not required to report when that income by itself exceeds the IRT mid-quarter.

If any member of the AU or person included in the family Maximum Aid Payment (MAP) has earned income or begins receiving earned income, the AU must report to the county when the family's combined gross income, earned and unearned, exceeds the AU's IRT during the QR payment quarter. Once the family receives income in excess of the IRT and reports it to the county, the county must take action, per MPP Section 44-316.324 (QR) (c) (1), to determine if the reported income is reasonably anticipated to continue and whether the AU's net nonexempt monthly averaged income for the remainder of the current QR Payment Quarter will exceed the AU's MAP. If the averaged income is reasonably anticipated to continue to exceed the AU's MAP for the remainder of the QR Payment Quarter, the county shall determine the AU financially ineligible and shall discontinue the AU at the end of the month in which the AU first received the income that exceeded the AU's MAP, with timely and adequate notice.

### **Informing Recipients of their IRT**

The informing notice that provides the IRT limits must be individualized for each CalWORKs case. The CWD shall inform each household of their IRT at the following times: 1) at least once a quarter; 2) at redetermination/recertification; 3) anytime there are changes in the CalWORKs AU or Family MAP size; 4) when there is a change of persons who are required to report income; and 5) upon recipient request. Additionally, the AU must be informed of the new IRT levels any time the IRT chart is updated. CWDs should also remind recipients that in addition to the IRT requirement, they must report all income and property on their QR 7.

Due to differences in automation and other practices, CWDs may inform recipients of the IRT requirements on the QR 7, the Notice of Action used to add or remove AU members, or on a separate informing notice. The CWD shall follow notification rules regarding individualized IRT levels in accordance with MPP Sections 40-173.8 and 44-316.324 as instructed above. The IRT level about which the recipient was last notified will be used for reporting purposes until the CWD has had an opportunity to update the recipient of any applicable IRT change.

### **IRT Chart Increments**

The attached IRT chart is effective October 1, 2009. The figures on the chart for all AU sizes in both Regions are based on the October 2009 Food Stamp gross income limits (130 percent of FPL). This year, Food Stamp gross income limits are higher than the CalWORKs MAP levels for all reporting sizes in both Regions. Therefore, income at 130 percent of FPL

or greater would render the family financially ineligible and CalWORKs MAP levels were not used to establish the IRT.

An entry of zero to the IRT Chart is to reflect the IRT amount for a reporting size of zero. This is to address those relatively rare occurrences where no person's needs are considered in determining the CalWORKs cash aid amount. An example of this would be a case where the only eligible child is a Maximum Family Grant child and his/her caretaker relative (parent) is either being sanctioned or penalized and there are no other persons in the home whose needs are considered in the Family MAP. In this situation, the MAP amount is zero and the IRT is \$227. We arrive at the IRT level for a reporting size of zero using the following formula:  $\$0 + \$225 + \$1 = \$226$  (income limit).  $\$226 + 1 = 227$  (IRT). One additional dollar is added to the income limit of \$226 to make the reporting size of zero over the income limit at \$227.

**Refugee Cash Assistance (RCA)/Entrant Cash Assistance (ECA) and Trafficking and Crime Victims Assistance Programs (TCVAP)**

The above instructions regarding the IRT also apply to the RCA/ECA Program in accordance with MPP Sections 69-201.4 and 69-301, which state that CalWORKs Program regulations relating to financial eligibility and payments apply to RCA/ECA unless specifically superseded by RCA/ECA regulations (i.e., MPP Section 69-206, which exempts specific income and resources from the income eligibility determination process). The above instructions regarding the IRT also apply to TCVAP.

Please direct questions regarding the CalWORKs IRT requirements to your CalWORKs County Consultant at (916) 654-1322. For questions regarding the Food Stamp FPL, you may contact LeAnne Torres at (916) 654-2135. For questions regarding RCA/ECA or TCVAP, please contact Camille Ancona at (916) 653-7785.

Sincerely,

***Original Document Signed By:***

CHARR LEE METSKER  
Deputy Director  
Welfare to Work Division

Attachment

**CalWORKs Income Reporting Threshold (IRT) Chart\***  
**Effective 10/1/09 to 9/30/10**

**Region One**

<b>Family IRT Size</b>	<b>Income Reporting Threshold</b>
0	\$227
1	\$1,174
2	\$1,579
3	\$1,984
4	\$2,389
5	\$2,794
6	\$3,200
7	\$3,605
8	\$4,010
9	\$4,416
10 or more	\$4,822

**Region Two**

<b>Family IRT Size</b>	<b>Income Reporting Threshold</b>
0	\$227
1	\$1,174
2	\$1,579
3	\$1,984
4	\$2,389
5	\$2,794
6	\$3,200
7	\$3,605
8	\$4,010
9	\$4,416
10 or more	\$4,822

\* The figures on the chart for all AU sizes in both Regions are based on the October 2009 Food Stamp gross income limits (130 percent of FPL). This year, Food Stamp gross income limits are higher than the CalWORKs MAP levels for all reporting sizes in both Regions. Therefore, income at 130 percent of FPL or greater would render the family financially ineligible. CalWORKs MAP levels were not used to establish the IRT.