

County of San Diego, Health and Human Services Agency (HHS) CalWORKs Program Guide

Persons Included in the Assistance Unit

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Revision Date:

July 1, 2020

Background:

The Assistance Unit (AU) is a group of related persons living in the same home who have been determined eligible for CalWORKs and for whom cash aid has been authorized.

Purpose:

To define the minimum requirements to establishing the AU, differentiate between the AU members, non-AU members and optional persons in the AU. The purpose of this material revision is to incorporate regulation changes concerning mandatory inclusion for determining AU composition.

Policy:

The Assistance Unit (AU)

After the Filing Unit (refer to CPG 41-500.A) has been established, an AU will be established when all eligibility factors have been met, including those persons who meet the mandatory inclusion and optional person requirements. If a person, not otherwise excluded, is found to meet the eligibility requirements, they are considered an eligible person who must be added to the AU if not considered an optional person. The AU is also referred to as the "Little MAP (Maximum Aid Payment)".

These eligible individuals must be living in the same home at the time of initial family application, mid-period if their addition has no negative action to the grant amount, at the beginning of the Semi-Annual Reporting (SAR) payment period for SAR cases, or the first of the month following the month the change was reported for Annual Reporting/Child-Only (AR/CO) cases.

Minimum Requirements

The AU is required to have at least one of the following:

- An eligible child
- One non-minor dependent in their own AU of one
- A needy caretaker relative of a:
 - Supplemental Security Income/State Supplementary Payment (SSI/SSP) child
 - Child who is eligible to receive federal Foster Care (aid code 42)
 - Kin-GAP child (aid code 4F or 4G)
- A pregnant woman
- A relative of a 16 or 17-year-old teen who is sanctioned by Employment Services (ES)

Mandatory Inclusion

The Mandatory Inclusion requirement means that a parent, sibling or half-sibling must be included in a Filing Unit and requires that an eligible parent, sibling or half-sibling must be included in the AU with the applicant or eligible child. An eligible child must be both deprived and needy, meaning that the child meets the requirements of all necessary linking and non-linking eligibility factors.

Linking eligibility factors are those single conditions that link a customer to the program: blindness and deprivation of parental care or support.

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Non-linking eligibility factors are those factors that establish whether an individual is eligible to assistance under the program to which the applicant is linked: age, property, residence, financial and institutional statuses.

The AU must include the following persons when they are living in the same home and are eligible:

- The applicant child(ren)
- Any eligible sibling or half-sibling of the applicant child who meets the age requirement
- Any birth or adoptive parent of the applicant child, or of an eligible sibling or half-sibling who meets the age requirement, except for an Alternatively Sentenced Prisoner (ASP)*
*An ASP is a parent who is a convicted offender permitted to live at home while serving a court-imposed sentence that precludes the parent from providing support through paid employment

The application must be denied, or the case be discontinued, when a mandatorily included person refuses to be included in the AU or fails to provide required documentation to determine eligibility.

Voluntary Maximum Aid Payment (MAP) Exclusion

Effective November 1, 2018, an AU may opt to receive full child support payments for a step/half-sibling of an eligible child in the AU, in lieu of CalWORKs for that step/half-sibling (refer to CPG 44-300.H).

Optional Persons

The following optional persons are those who are not otherwise required to be in the AU but can be included upon customer's request:

- Any non-parent relative who has been determined to be the caretaker relative of the child
- Any other eligible child, including but not limited to, a grandchild or niece/nephew of the caretaker relative
- Any essential person (stepparent, California domestic partner of the eligible child's parent, or ASP) meeting the identification of persons for claiming of financial participation requirements (refer to CPG 41-500.G)

A person identified as an excluded person cannot be in the AU even if previously identified as a mandatorily included or optional person.

When a change in the number of persons living in the home is reported, the Human Services Specialist (HSS) must:

- Identify for the customer any person living in the home who may be included in the AU
- Explain the effect of including or excluding the optional person by describing the AU composition which will result in the maximum grant amount to which the family is eligible, considering the income and resources of each person who may be included

AU Determination

- The HSS determines who is mandatorily to be included or excluded from the AU
- The HSS and customer together decide whether an optional person is included in the AU

The HSS will use the mandatory inclusion regulations based on the circumstances unique to that family when determining an AU, ensuring no conflicts with other CalWORKs regulations.

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A child may be deprived of parental care or support for more than one reason. Before identifying a sibling or half-sibling as an eligible child, the HSS must evaluate non-linking factors. A sibling or half-sibling may meet a basis of deprivation but remain an ineligible child for inclusion in the AU.

Combining Assistance Units

Two or more AUs in the same home must be combined into one AU when any of the following is met:

- A caretaker relative is married to another caretaker relative in another AU
- Two caretaker relatives in the home have separate children and have a child in common
- There is only one caretaker relative

Combining AUs Mid-Period

When a voluntary mid-period change is made that would combine separate AUs, the worker will compare the monthly grant for the combined AUs to the total combined monthly grants of the separate AUs and combine the AUs the first of the:

- Month following the voluntary report, if the combined AU's monthly grant would be higher than the total combined monthly grant of two separate AUs
- Next Payment Period, if the combined AU's monthly grant does not result in an increase to the total combined monthly grant of the separate AUs

Procedure:

- Desk Aid - Mandatory Inclusion in the Assistance Unit (AU) - Scenario Examples
Refer to the desk aid, located in Eligibility Essentials, for mandatory inclusion examples

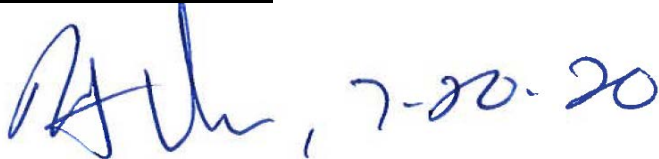
References:

- EAS 82-800
- ACL No. 18-82
- ACIN No. I-03-20

Sunset Date:

This policy will be reviewed for continuance by July 31, 2023.

Approval for Release:



Rick Wanne, Director
Eligibility Operations