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**Date:** January 6, 2015

**MEPD Bulletin Number: #15-03**

**To:** Eligibility Services – Regional Directors  
Program Managers  
Eligibility Services Supervisors  
Regional Attorneys  
Hearings Officers

**From:** Stephanie Stephens, Director  
Policy Strategy, Analysis, and Development  
State Office 2115

**Subject: Budgeting of Alien Sponsor's Income and Resources**

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Bulletins are sent to supervisors and other regional managers, who must share the information with eligibility staff. Please ensure that copies are provided to staff without access to email. For questions regarding the information in this memo, follow regional procedures. Find active bulletins at the following respective handbook websites:

- Medicaid for the Elderly and People with Disabilities (MEPD):  
[http://www.dads.state.tx.us/handbooks/mepd\\_policy/index.htm](http://www.dads.state.tx.us/handbooks/mepd_policy/index.htm)
- Texas Works:  
[http://www.dads.state.tx.us/handbooks/texasworks\\_bulletins/index.htm](http://www.dads.state.tx.us/handbooks/texasworks_bulletins/index.htm)

## **Budgeting of Alien Sponsor's Income and Resources**

### **Background**

A sponsored alien is a Legal Permanent Resident (LPR) who has been sponsored by an individual who signed an affidavit of support (USCIS I-864 or I-864A) on or after December 19, 1997. Federal law requires counting the income and resources of an alien sponsor and the sponsor's spouse (if the spouse also signed the affidavit of support for the alien) when determining eligibility. The policy does not apply to Emergency Medicaid programs.

## **Current Policy**

Deeming of the sponsor's income and resources does not apply if the sponsored alien meets one of the following exceptions:

- Is ineligible for benefits;
- Is or becomes a U.S. citizen;
- Has 40 qualifying quarters;
- Has refugee status;
- Has asylee status;
- Has a deportation that has been withheld;
- Is sponsored by an organization or is not required to have a sponsor;
- Is a battered alien spouse, or a child or parent of a battered alien;
- Is indigent (unable to obtain both food and shelter).

Sponsor-to-alien deeming does not apply if the alien sponsor is deceased.

Please refer to MEPS Handbook Section D-9000 for more information regarding this policy.

## **New Policy**

There are **no changes** to the policy related to Alien Sponsor's Income and Resources.

Most verification sources for exceptions to deeming an alien sponsor's income and resources are not changing. However, when a sponsor is deceased, client statement is not an acceptable verification source. Acceptable verifications for the death of an alien sponsor are the same as those required for deprivation (TWH A-1081) and are listed on the *Form H1020* as well.

## **Current Process**

The Texas Integrated Eligibility Redesign System (TIERS) does not accurately calculate the income and resources of an alien sponsor and sponsor's spouse (if applicable) when determining eligibility for a sponsored alien.

## **New Process**

When required, TIERS accurately calculates and includes the income and resources of an alien sponsor and sponsor's spouse (if applicable) when determining eligibility and applies the appropriate alien sponsor exemptions and deductions.

Permissible purpose is required when accessing an individual's ELDS information. Staff must request a sponsor's and sponsor's spouse's (if applicable) permission to retrieve information using ELDS by requesting Form H0004, Consent for a Person Sponsoring an Immigrant. TIERS now supports the retrieval and display of electronic data sources (ELDS) for alien sponsors and sponsor's spouse (if applicable) from the Systematic Alien Verification for Entitlements (SAVE). Since these individuals may not be requesting aid, HHSC must request their permission to access their ELDS information for the case.

**Note:** Although a sponsored alien may meet an exception, specialists must enter the sponsor's and sponsor's spouse's (if applicable) information into TIERS. TIERS correctly identifies whether they meet an exception during the budgeting process in EDBC.

## **Automation**

### Permission for ELDS Use

Effective December 13, 2014, TIERS receives information from ELDS SAVE to verify if an alien has a sponsor(s) or is likely to have a sponsor. This information will be received even whether an alien does not report a sponsor.

To record consent, staff must pend for Form H0004, Consent for a Person Sponsoring an Immigrant. The Form H0004 is also required for the sponsor's spouse if applicable. TIERS now include pages and functionality to record and pend for Form H0004. The signature provides HHSC permissible purpose to access ELDS about the sponsor and (if applicable) the sponsor's spouse.

Once the information regarding the sponsor and sponsor's spouse (if applicable) along with their consent is received, TIERS accesses ELDS.

### Sponsor(s)-Permission(s) provided for ELDS Service

The new page is located after the **Initiate Interview** LUW, and just before the **Individual Information** LUW in the driver flow. This page is queued in the driver flow for all MEPD and TW TOAs except MBCC and TWHP.

Each case individual is displayed on this page, along with following two questions, each with the selection of YES, NO or PEND.

- Is Permission Required?
- Individual Provided Permission for ELDS Service?

Depending on the individuals in the case, the questions on this page may be mandatory. Permission is required from the sponsor if the alien indicates he/she has a sponsor (and spouse is applicable) and the sponsor is not requesting aid.

When the questions on the permissions page are set to PEND, TIERS pends the Form H0004 for permission from the sponsor to use ELDS.

If Form H0004 is not returned, TIERS will not retrieve or use ELDS information to verify the sponsor's demographic and income information. Specialists must request verification of income and resources from the alien or the alien's sponsor.

Permission(s) for ELDS Service Change Password Logout Help

**Sponsor(s) - Permission(s) provided for ELDS Service**

Case Name: Case #: Case Mode: Approved Case Status: Complete Action

Reset Previous Next

	Case Individual	Is Permission Required?	Individual Provided Permission for ELDS Service?
<input checked="" type="checkbox"/>		YES	YES
<input checked="" type="checkbox"/>		YES	YES
<input checked="" type="checkbox"/>		PEND	
<input checked="" type="checkbox"/>		NO	NO

Reset Previous Next

Sponsor(s)-Permission(s) provided for ELDS Service page

Deceased Verification:

Mother's Maiden Name:

**Other Information**

Does the individual have other names?

Does the individual have SSCN or Railroad Retirement Number information?

Is the individual an HHSC employee?  Employee #:

Is the individual a State employee Participating In Employee Retirement System ?

Is the Individual a Public school district employee participating in Teachers Retirement System?

Request for data broker information?

Do you wish to request a Credit Report?

Is the individual a member of a federally recognized Indian tribe?  Tribe Name:

Verification:

Is the individual enrolled in DSHS Children with Special Health Care Needs program?

**Is ELDS permission required?**

**Individual provided permission for ELDS Service?**

Is this individual high-need or high-profile?  Criteria:

Was the individual in Foster Care/VolAg Conservatorship on their 18th birthday?  Type of Conservatorship:

If Yes, State:

Verification:

### Individual Information page

**Note:** During add-a-person, permission is collected in the **Individual** LUW. In an add-a-person scenario, these questions are activated on the **Individual Information** page.

#### Alien/Refugee-Details

When the alien indicates he/she has a sponsor, the specialist must answer the question on the **Alien/Refugee-Details** page accordingly. If there is a sponsor, to pend for the sponsor's demographic, income, and resources information, set the question, *Is there a VolAg or a sponsor for this Alien?* to PEND. TIERS pends for the necessary information from the sponsor.

Form H1020, Request for Information or Action, will be mailed to the household requesting the following information:

- Alien sponsor name
- Alien sponsor DOB
- Alien sponsor SSN
- Alien sponsor earned income
- Alien sponsor unearned income
- Alien sponsor self-employment income
- Alien sponsor resources

If permission to use ELDS information is received for the sponsor and/or sponsor's spouse, ELDS may retrieve the same information requested by the Form H1020.

If the sponsored alien does not return Form H0004 with the missing information, specialists must return to the **Sponsor(s)-Permission(s) provided for ELDS Service** page to update the question, *Individual provided permission for ELDS service?* to NO. This ensures the VCL is cleared and TIERS knows not to use ELDS information for the alien sponsor. Process the case/EDG using only the information provided by the sponsored alien.

#### *Alien Sponsor ELDS Information*

When TIERS retrieves ELDS information for an alien, this includes information indicating whether he or she may be a sponsored alien. The SAVE information may be available in real time or ELDS processing timelines may delay this information and it will not be available in real time.

An ELDS block will display on both the **Alien/Refugee - Summary** and the **Alien/Refugee - Details** pages. There are two new pieces of information displayed in this block:

- *Alien Sponsor Info Returned?*
- *Is Alien Sponsor Info Likely?*

Summary **Details** Sponsor

Change Password Logout Help

**Alien/Refugee - Details**

Case Name: LastName, FirstName Case #: 1111111111 Case Mode: Complete Action Case Status: Approved

Previous Next

Electronic Data Sources Information

	Date of ELDS Acquisition	Name	Alien Status	Verified by DHS	USCIS Documented US Entry Date	Document Expiration Date	Alien Sponsor Info Returned?	Is Alien Sponsor Info Likely?	Data Source
REMIT	06/25/2014 04:03:51 PM	Test,Test 31F	Documented	YES	01/25/2013	06/25/2014	NO	YES	SAVE (A) (B)

Self Service Change Request Information

	Date Submitted	Name	Alien Status	USCIS Documented US Entry Date	Is there a Sponsor?	Alien Registration Number
REMIT	06/25/2014 04:03:51 PM	Test,Test 31F	Documented		NO	T344444444 (C)

Self Service Redetermination Information

	Date Submitted	Name	Alien Status	USCIS Documented US Entry Date	Is there a Sponsor?	Alien Registration Number
REMIT	06/25/2014 04:03:51 PM	Test,Test 31F	Documented		NO	T344444444 (C)

Self Service Application Information

	Date Submitted	Name	Alien Status	USCIS Documented US Entry Date	Is there a Sponsor?	Alien Registration Number
REMIT	06/25/2014 04:03:51 PM	Test,Test 31F	Documented		NO	T344444444 (C)

### Alien/Refugee – Details page

If SAVE information is returned and indicates there is an alien sponsor, the question, *Alien Sponsor Info Returned?* is set to YES. When ELDS SAVE alien sponsor information is not available or is delayed and it is likely that sponsor information exists, the question, *Is Alien Sponsor info Likely?* is set to YES. The specialist is notified via a missing information task when the information is returned from ELDS.

TIERS sets the answer to the question, *Is there a VolAg or Sponsor for this alien?* according to the information received from ELDS SAVE. TIERS hard pends this question when ELDS SAVE alien sponsor information is delayed, but it is likely that sponsor information exists.

If ELDS SAVE alien sponsor information is not returned by the final due date and the client states he/she does not have a sponsor, the specialist must clear the hard pend and certify the EDG if all other eligibility criteria is met.

### Alert #837, Missing Information Received

TIERS may receive alien sponsor information from ELDS SAVE through a delayed response from Data Broker. When TIERS receives this information from Data Broker, TIERS generates *Alert #837 - Missing Information Received*. This alert generates a task with the same name, *Alert #837, Missing Information Received*. This task requires specialists to navigate to the **Alien/Refugee** LUW to view and process the alien sponsor information received from ELDS.

### Organization Questions

There are two new fields on the **Alien/Refugee - Details** page:

- *Is there verification the organization no longer exists?*
- *Did the organization provide income and resources information?*

These fields capture information about an alien who is applying for TANF and is sponsored by an organization. These questions do not apply to an alien applying for only MEPD programs.

### ELDS Information and File Clearance

Specialists must perform inquiry prior to doing file clearance to avoid assignment of duplicate individual numbers.

If there is ELDS sponsor information, the following message appears at the top of the **Alien/Refugee - Sponsor** page:

*“Before accept, please add the sponsor on the Individual LUW or identify the sponsor as an existing individual with the FC button.”*



ERR001: Before accept, please add the sponsor on the Individual LUW or identify the sponsor as an existing individual with the FC button

Before accepting any ELDS information into TIERS, the specialist must make sure the individual exists in TIERS. There are two ways to do this.

The first option requires the advisor to:

- Enter the individual in the **Individual Information** LUW and perform File Clearance following current processes.
- Use the File Clearance option on the ELDS block on the **Alien/Refugee-Sponsor** page to perform File Clearance from the **Alien/Refugee** LUW.

The second option requires staff to perform File Clearance from the **Alien/Refugee-Sponsor** page, which may be useful if the applicant has not yet reported a sponsor, but SAVE information indicates a sponsor exists.







Summary Details **Sponsor**

**Alien/Refugee - Sponsor** ? Q [PDF] [B] [P]

Case Name: TestL\_TestF Case #: 1000000001 Case Mode: Change Action Case Status: Approved

**ERR001: Before accept, please add the sponsor on the individual LUW or identify the sponsor as an existing individual with the FC button**

Electronic Data Sources Information

	Alien Sponsor Name	Alien Sponsor SSN	Data Source	Date of ELDS Acquisition	
	Test, Test 25F	123-45-6789	SAVE	06/25/2014 04:03:51 PM	 <a href="#">EC</a>
	Test, User 34M	453-45-6765	SAVE	06/25/2014 04:03:51 PM	 <a href="#">EC</a>

Individual Information

Name: TestL\_TestF 27F Individual #: 99999999

Dates

Effective Begin Date: 04 / 01 / 2007 End Date: 08 / 01 / 2016

Alien/ Refugee Sponsor

Name: Individual #:

Alien Sponsor's Spouse Information

Spouse of Sponsor:

Prefix: First: Middle: Last: Suffix:

Alien Sponsor's Deductions/Resources/Unearned Income

Number of tax dependents of Sponsor/spouse not living with the sponsor:	<input type="text" value="0"/>	How many individuals are sponsored by the sponsor:	<input type="text" value="0"/>
Number of tax dependents of sponsor/spouse living with the sponsor:	<input type="text" value="0"/>	Monthly income amount contributed for this individual:	<input type="text" value="0.0"/>
Monthly resources contributed for this individual:	<input type="text" value="0"/>	The total amount the sponsor pays to a claimed tax dependent living outside the home:	<input type="text" value="0.0"/>
Total alimony expenses the sponsor pays to persons living outside the home:	<input type="text" value="0"/>	Total child support expenses the sponsor pays to persons living outside the home:	<input type="text" value="0.0"/>

Sponsor Address

**Alien/Refugee-Sponsor page**

File Clearance

To perform File Clearance from the **Alien/Refugee-Sponsor** page, first select the *FC* hyperlink for the appropriate *Alien Sponsor Name*. The sponsored alien applying for benefits may have

multiple sponsors, so SAVE may return more than one record. Selecting the *FC* hyperlink opens the **Sponsor(s)-Alien Sponsor FC Match** page.

Sponsor	Existing Individual(s)	Score	FC Match Individual	Individual Exists In Current Case
Teste, Mom 34M	Mom, Teste 34F	74	905069676	Yes
Teste, Mom 34M	Teste, Mom 34M	95	905080490	No

### Sponsor(s)-Alien Sponsor FC Match page

This page displays the following information for individuals already in TIERS that may match the information returned from SAVE:

- The *Sponsor* column lists the name of the sponsor that was returned from SAVE
- The *Existing Individual(s)* column lists the name, age, and gender of the existing TIERS individual that may match this SAVE information
- The *Score* column shows a match score for the individual, which TIERS uses to indicate the quality of the match between the SAVE individual and the existing TIERS individual
- The *FC Match Individual* column displays the individual number for the existing TIERS individual
- The *Individual Exists in Current Case* column shows *YES* if the existing individual is already in the sponsored alien's case and *NO* if the existing individual is not already in the sponsored alien's case

#### Match

If there is a match between the SAVE information and an existing TIERS individual, verify that it is the correct individual, select the matching individual, and *Submit* to perform File Clearance. At that time, the SAVE information will populate the **Alien/Refugee-Sponsors** page with the

applicable sponsor information and the existing individual's information will also be associated to the sponsored alien's case.

**IMPORTANT:** When adding a sponsor or a sponsor's spouse as a case individual, the specialist *must* return to the **Individual Household Status** page to make sure that:

- *Out of Household* is selected for the *Household status?* field.
- *NO* is selected for the fields *Is still part of MAGI household?* And *Temporarily Absent?*

The answers to these questions determine how the individual is counted in the sponsored alien's budget group. If the sponsor or sponsor's spouse is not indicated as *Out of Household*, TIERS will not apply alien sponsor budgeting rules.

### No Match

If the sponsor information from SAVE does not match any existing TIERS individual, select *Cancel* to return to the **Alien/Refugee - Sponsor** page.

If the individual provided by SAVE appears to be new to TIERS, return to the **Individual Information** LUW and accept the ELDS information there to establish the sponsor as a new individual in TIERS.

### Alien Sponsor/Spouse Information

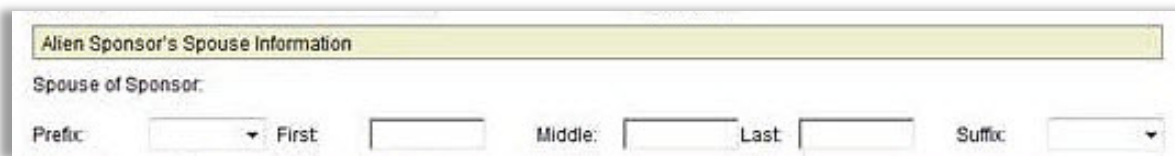
Specialists must enter the alien sponsor and alien sponsor's spouse information on the **Alien/Refugee-Sponsor** page. The alien sponsor must be added to the case as an individual. If the alien sponsor's spouse has signed an affidavit of support (USCIS I-864 or I-864A), add the alien's sponsor's spouse to the case as well. See MEPDH Section D-9230 for more policy information.

If the spouse is not also a sponsor, do not enter the spouse as a case individual. Specialists must enter the spouse in the *Alien Sponsor's Spouse Information* section of the **Alien/Refugee - Sponsor** page. If the sponsor's spouse does not live with the sponsor, do not enter the sponsor's spouse into TIERS.

1st Example: Jean is a sponsored alien applying for benefits. She is sponsored by David, who lives outside Jean's household with his wife, Linda. Both David and Linda have signed an affidavit of support for Jean. Since they both signed the affidavit, David and Linda are entered as individuals in the **Individual Information** LUW and added to the case. TIERS will count the income and resources of both David and Linda in Jean's budget.

2nd Example: Alan is a sponsored alien applying for benefits. He is sponsored by Janet, who lives outside Alan's household with her husband, Edward. Janet has signed an Affidavit of Support for Alan, but Edward has not. Janet is added to the case as a case individual. Edward is not added as a case individual. Edward's information is only recorded in the *Alien Sponsor's*

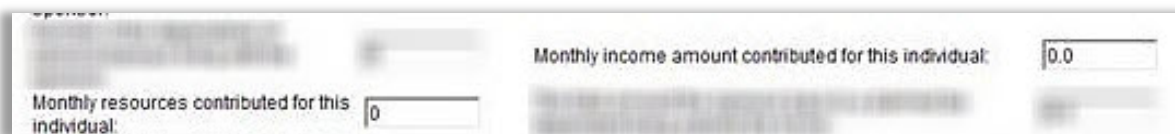
*Spouse Information* section of the **Alien/Refugee - Sponsor** page. TIERS will count only the income and resources of Janet in Alan's budget.



### *Contributed Income/Resources*

In the *Sponsor Information* section of the **Alien/Refugee - Sponsor** page, the field, *Contributed amount for this individual*, has been replaced with the following two fields:

- *Monthly income amount contributed for this individual*
- *Monthly resources contributed for this individual*



Specialists must complete these fields when a sponsor is contributing income and/or resources to the sponsored alien. The information must be provided by the alien or the alien's sponsor and will be used to determine if the alien meets indigent criteria. For SNAP, the information is used to determine the sponsor's gross countable income.

**Note:** TIERS does not have VCLs for these questions. If the alien does not provide the required information, attempt to contact the individual by telephone to confirm these amounts. If unable to contact the individual, create an unearned income record for the sponsored alien and select *Not Verified* on the **Unearned Income-Payments** page. TIERS will pend the EDG for the income information. Document in the following places:

- On the *Form H1020* indicate the alien must provide information about the income and resources that their sponsor gives them;
- In case comments, document that the EDG has been pended for information about contributed income and resources.

### *Sponsor Expenses*

There are three other new fields on the **Alien/Refugee - Sponsor** page:

- Total alimony expenses the sponsor pays to persons living outside the home
- Total amount the sponsor pays to a claimed tax dependent living outside the home

- Total child support expenses the sponsor pays to persons living outside the home

Total alimony expenses the sponsor pays to persons living outside the home:	<input type="text" value="0"/>	The total amount the sponsor pays to a claimed tax dependent living outside the home:	<input type="text" value="0.0"/>
		Total child support expenses the sponsor pays to persons living outside the home:	<input type="text" value="0.0"/>

These questions refer to an individual who is living outside of the sponsor's home.

TIERS deducts these expenses when determining the income of the sponsor and the sponsor's spouse for TW programs. TIERS does not use these fields for MEPD programs. For existing cases, these new fields will be defaulted to \$0. MEPD specialists do not need to update these fields.

**Note:** TIERS does not have VCLs for these questions. The EDG must be manually pended to collect this information.

### Recording Multiple Sponsors

Once the **Alien/Refugee - Sponsor** page is completed for an alien sponsor, click **Add** to save the record. If the sponsored alien has multiple sponsors, complete the page and click **Add** again to add another sponsor. The specialist must repeat these steps until all applicable sponsors are added to the page. Use the **Edit** icon to update a sponsor record or the **Delete** icon to remove a sponsor record.

Alien Sponsor Name	Spouse of Sponsor	Sponsor Address	Effective Begin Date	End Date	
					 

The **Alien/Refugee** LUW creates records based on the sponsored alien. If an individual sponsors multiple immigrants in the case, complete the **Alien/Refugee—Sponsor** page for each sponsored alien.

### New RC Result

At redetermination, a new RC result, *No Permission Granted*, may appear on the **EDG Summary** page when the question, *Individual Provided Permission for ELDS Service?*, is set to *NO* on the **Sponsor(s)-Permission(s) provided for ELDS Service** or **Individual Information** page.

The RC result of *No Permission Granted* indicates the Alien Sponsor did not give HHSC permission to use their ELDS information. TIERS will run the regular financial rules since it cannot compare the ELDS information to the client statement for the RC process.

For example: Gloria is a sponsored alien who is applying for benefits. Daisy, her cousin who lives in another city, is her sponsor. Daisy does not provide permission to use ELDS information. The specialist must select *NO* for the question, *Individual Provided Permission for ELDS Service?*

However, Gloria provides paper verification of Daisy's demographic, income, and resource information. Since TIERS cannot use ELDS information for Daisy, it does not run the RC process and only runs regular financial rules. The RC result is *No Permission Granted*.

Since Gloria provided all necessary verification, including Daisy's information, she may be eligible for benefits.

Summary Notice Reasons Resource Budget Copay Reasonable Compatibility

**Medicaid Eligibility - EDG Summary** ?

Case Name: Walker, Johnny Case #: 1902179673 Case Mode: Intake Case Status: Pending

EDG Name: EDG #: 919778655 TOA: ME - State Group Home  
 Benefit Period: 08/01/2014- Eligibility Status: Approved Authorization Status:  
 Special Review Date: Certification Period: 06/01/2014- Review Due Date:  
 Special Review Reason:

EDG Information:

Eligibility Begin Date: 06/01/2014 Eligibility End Date:

Non Financial	: Pass	Verification	: Pass	Previous Benefit Amount	:
Resources	: Pass	Auto Dispose	: No	Current Benefit Amount	:
Reasonable Compatibility Type	: Not Applicable	Expedited	: No	Supplement	:
Reasonable Compatibility Result	: Not Applicable	Late Determination Date	:	Overpayment	:
Financial	: Pass	Short Certification	:	Manual Issuance	:
SNAP	: No				
RASCL	:				

Food Stamp Streamlined Reporting Type :  
 MEPD Streamlined Redetermination :

Supplement Comments :

Restored Benefit Details:

Restored Benefit Request Date	:	Court Order	:
Reason Household is Entitled to Benefits:		Original Benefit	:
		Approved Amount	:
Reason HHSC Owes Benefits:		Net Restoration Amount	:
		Restored Offset Amount	:

Name	Certified Group	Relationship	Indigent Alien	Participation Status	Type of Assistance
EDG Walker, Johnny	Y	Self	N	Eligible Adult	ME - State Group Home
Walker, Jane	N	Wife	N	Other Adult	ME - State Group Home

Excluded

Override Details Eligibility Summary

Medicaid Eligibility-EDG Summary page

Indigent Alien Field

At the bottom of the **EDG Summary** page, new information, *Indigent Alien*, appears for each individual. TIERS will set this field to Y, if the individual is a sponsored alien whose total income in the month of application does not exceed the SSI income limit for an individual.

If an individual is identified as an *Indigent Alien*, TIERS will not include the income of the alien sponsor in the budget. TIERS will use the information entered on the **Alien/Refugee Sponsor** page to calculate the budget. TIERS adds the income entered for *Monthly income amount contributed for this individual* to the sponsored alien's total income.

For example, Vera is an immigrant being sponsored by her brother, Isaac, who lives in a different city. She makes \$100 a month. Isaac is giving Vera a cash contribution of \$200 monthly. When TIERS calculates the budget, it counts Vera's own income, \$100 a month, and adds the amount from the field *Monthly income amount contributed for this individual*. Vera's total income is \$300 a month, which is below the SSI FBR for an individual. Therefore, Vera is considered an indigent alien, and her sponsor's income and resources are not deemed to her budget.

#### *Alien Sponsor Income Hyperlink*

On the **ME-Institutional/Waivers Income Results** page, a hyperlink appears for *Deemed Income from Alien Sponsor*. The amount for *Deemed Income from Alien Sponsor* is counted in the total income for an EDG with an alien sponsor. When the hyperlink is selected, a breakdown of the Alien Sponsor budget appears. If TIERS determines the sponsored alien is indigent, this link is disabled.



Summary	Notice Reasons	Resource	Budget	Copy	Reasonable Compatibility
<b>ME - Institutional / Waivers Income Results</b>					
<b>Case Name:</b> Walker, Johnny		<b>Case #:</b> 1902179673		<b>Case Mode:</b> Intake	
<b>Case Status:</b> Pending					
<b>EDG Name:</b> Walker, Johnny		<b>EDG #:</b> 919778655		<b>TOA:</b> ME - State Group Home	
<b>Benefit Period:</b> 08/01/2014-		<b>Eligibility Status:</b> Approved		<b>Authorization Status:</b>	
<b>Special Review Date:</b>		<b>Certification Period:</b> 06/01/2014-		<b>Review Due Date:</b>	
<b>Special Review Reason:</b>					
Budget Type : Companion					
Earned Income : \$ 2000.00					
<a href="#">Self Employment Income</a> + \$ 0.00					
Total Earned Income = \$ 2000.00					
Unearned Income + \$ 0.00					
<a href="#">Deemed Income from Alien Sponsor</a> + \$ 0.00					
Total Income = \$ 2000.00					
VA Special Needs Exclusion - \$ 0.00					
COLA Exclusion - \$ 0.00					
Total Income Deposited to QIT - \$ 0.00					
Countable Income = \$ 2000.00					
Income Limit : \$ 2163.00					
Income Test Result : Pass					

### ME-Institutional/Waivers Income Results page

#### ME-EDG Alien Sponsor Group Income Results Page

The *Deemed Income from Alien Sponsor* hyperlink leads to the **ME-EDG Alien Sponsor Group Income Results** page. Here, TIERS displays the information for the *Alien Sponsor's Countable Income* to be included in the Medicaid budget.

TIERS calculates and displays the earned and unearned income for the sponsor and the applicable allocations for the sponsor, sponsor's spouse, and sponsor's dependents **on the ME-EDG Alien Sponsor Group Income Results** page.

TIERS calculates the allocations using information from the **Alien/Refugee-Sponsor** page. The allocation for the sponsor is equal to the individual SSI FBR amount. The allocation for each dependent of the sponsor is equal to one-half of the individual SSI FBR. TIERS then subtracts the allocations from the sponsor's gross income to arrive at the *Alien Sponsor's Countable Income*.

Alien Sponsor

### ME- EDG Alien Sponsor Group Income Results ?

<b>Case Name:</b> Walker, Johnny	<b>Case #:</b> 1902179673	<b>Case Mode:</b> Intake	<b>Case Status:</b> Pending
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<b>EDG Name:</b> Walker, Johnny	<b>EDG #:</b> 919778655	<b>TOA:</b> ME -State Group Home
<b>Benefit Period:</b> 08/01/2014-	<b>Eligibility Status:</b> Approved	<b>Authorization Status:</b>
<b>Special Review Date:</b>	<b>Certification Period:</b> 06/01/2014-	<b>Review Due Date:</b>
<b>Special Review Reason:</b>		

Alien Sponsor Group Income:

Total Earned Income:		\$	0.00
Total Unearned Income:	+		0.00
<b>Total Income:</b>	=	<b>\$</b>	<b>0.00</b>
SSI FBR for Alien Sponsor:	-		0.00
SSI FBR for Alien Sponsor's Spouse:	-		0.00
SSI FBR for each tax dependent of Alien Sponsor & Sponsor's Spouse	-		0.00
<b>Alien Sponsor's Countable Income:</b>	=	<b>\$</b>	<b>0.00</b>

[← Previous](#)
[Eligibility Summary](#)

**ME-EDG Alien Sponsor Group Income Results page**

*ME Resources*

On the **ME-Resource Results** page, a new item appears in the calculation of the EDG's resources. The amount for Deemed Resources from alien sponsor is the amount of the alien sponsor's resources that TIERS will count for the EDG.

Summary	Notice Reasons	<b>Resource</b>	Budget	Copay	Reasonable Compatibility
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**ME - Resource Results** ⓘ

<b>Case Name:</b> Walker, Johnny	<b>Case #:</b> 1902179673	<b>Case Mode:</b> Intake	<b>Case Status:</b> Pending
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<b>EDG Name:</b>	<b>EDG #:</b> 919778655	<b>TOA:</b> ME - State Group Home
<b>Benefit Period:</b> 08/01/2014-	<b>Eligibility Status:</b> Approved	<b>Authorization Status:</b>
<b>Special Review Date:</b>	<b>Certification Period:</b> 06/01/2014-	<b>Review Due Date:</b>
<b>Special Review Reason:</b>		

Vehicle	:	\$	0.00
Real Property	+	\$	0.00
Liquid	+	\$	0.00
Trust	+	\$	0.00
Burial	+	\$	0.00
Lump Sum	+	\$	0.00
Life Insurance	+	\$	0.00
Mineral Rights	+	\$	0.00
CCRC and LCCA	+	\$	0.00
Other Resources	+	\$	0.00
Deemed Resources from Parent(s)	+	\$	0.00
<b>Deemed Resources from Alien Sponsor</b>	+	\$	<b>0.00</b>
<b>Total Resource Amount</b>	=	\$	<b>0.00</b>
<b>Spousal Protected Resource Amount</b>	-	\$	<b>23448.00</b>
Expanded SPRA Amount	-	\$	0.00
<b>Total Countable Resources Amount</b>	=	\$	<b>0.00</b>
Resource Limit	:	\$	2000.00
<b>Resource Eligibility Result</b>	:		<b>Pass</b>

Resource Transfer Period of Ineligibility

Individual Name	Begin Date	End Date

[Details](#)

### ME-Resource Results page

#### FS-EDG Alien Sponsor Group Income Results

The *Alien Sponsor Group Applied Income* hyperlink on the **FS Gross Income/165% Income Results** page leads to the **FS-EDG Alien Sponsor Group Income Results** page. Here, TIERS displays information from the alien sponsor that is considered for the SNAP budget.

For SNAP, TIERS uses 20% of the Sponsor's monthly gross earned income for the *Work Related Expense Deduction*.

TIERS calculates a *Needs Deduction* using information from the **Alien/Refugee-Sponsor** page. TIERS allows a needs deduction that corresponds to the SNAP gross income limit for size of the alien sponsor's household. TIERS determines the sponsor's household size by adding together:

- The sponsor
- The sponsor's spouse
- The total number of tax dependents of the sponsor and spouse, either living with or not living with the sponsor and/or spouse

TIERS then subtracts this *Needs Deduction* to arrive at the *Net Actual Income*.

TIERS then compares the *Prorated New Actual Income* to the *Monthly Contribution from Alien Sponsor*, which was entered on the **Alien/Refugee-Sponsor** page, and counts the larger of these two as the *Alien Sponsor's Countable Income*.

## FS- EDG Alien Sponsor Group Income Results ?

<b>Case Name:</b> F, Mama	<b>Case #:</b> 1902178433	<b>Case Mode:</b> Change Action	<b>Case Status:</b> Approved
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<b>EDG Name:</b> F, Mama	<b>EDG #:</b> 919774068	<b>TOA:</b> FS - NPA
<b>Benefit Period:</b> 06/01/2014-	<b>Eligibility Status:</b> Approved	<b>Authorization Status:</b>
<b>Special Review Date:</b>	<b>Certification Period:</b> 04/01/2014-09/30/2014	<b>Review Due Date:</b> 09/30/2014
<b>Special Review Reason:</b>		

## Alien Sponsor Group Income:

Name : Nina F

Individual #: 905071431

Earned Income Eligible for Work Related Expense Deduction:	\$	5527.46
Earned Income Ineligible for Work Related Expense Deduction:	+	0.00
<b>Countable Earned Income:</b>	=	<b>\$ 5527.46</b>
Work Related Expense Deduction:	-	1105.49
<b>Net Earned Income:</b>	=	<b>\$ 4421.97</b>
Unearned Income	+	0.00
<b>Adjusted Income:</b>	=	<b>\$ 4421.97</b>
Needs Deduction:	-	1180.00
<b>Net Actual Income:</b>	=	<b>\$ 3241.97</b>
Count of Adults in Income Group:		N/A
Count of Children in Income Group:		N/A
Count of Sponsored Aliens Receiving SNAP:		1
<b>Prorated Net Actual Income:</b>	<b>\$</b>	<b>3241.97</b>
Monthly Contribution from Alien Sponsor:	<b>\$</b>	<b>3300.00</b>
<b>Alien Sponsor's Countable Income :</b>	<b>\$</b>	<b>3300.00</b>

**Effective Date**

Changes are effective with the implementation of Release 92 scheduled on December 13, 2014 for actions processed effective January 2015 and ongoing.

**Handbook**

The Texas Works Handbook will be updated with the April 2015 revision.

## **Training**

Training will be delivered via web-based courses and live webinars titled “Course D2: ACA – Alien Sponsor Income and Resources for MEPD.”