



Guide to Six-Month Budgeting

For MFIP, UHFS, GA and RCA

Table of Contents

Overview.....	1
Minnesota Family Investment Program (MFIP) Six-Month Budgeting	1
Prospective Budgeting.....	1
Reporting Requirements	3
Six-Month Report Forms	4
MAXIS Coding Instructions	4
Processing the January HRF.....	4
Processing a New Application	6
Processing a Recertification	9
Processing a change	12
Increase in income ONLY:.....	12
Decrease in income ONLY:	12
Change in eligibility for RSDI.....	16
Adding a Household Member.....	16
Cash Prizes and Winnings Above \$4500.....	19
Child Support [REDACTED]	19
Suspensions	19
Uncle Harry Food Support (UHFS) Six-Month Reporting	20
Budgeting Income Changes.....	20
Budgeting Income Workaround	23
UHFS Reporting Changes.....	25
Reporting Change Effective 03/01/25	25
Reporting System Workaround.....	27

Household Report Forms (HRFs)	31
Six-Month Reviews	31
Six-Month Review Dates.....	32
Recertifications.....	33
Child Support	33
General Assistance (GA) Workaround Instructions.....	34
Refugee Cash Assistance (RCA) Work Around for Six-month Budgeting	38

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Overview

This guide provides policy information and system guidance for six-month budgeting for MFIP, UHFS, GA and RCA. The policy information in this guide is effective beginning the benefit month of 3/25. Follow the policy in this guide unless directed to the Combined Manual.

Minnesota Family Investment Program (MFIP) Six-Month Budgeting

Use this guide to learn more about six-month budgeting changes effective 3/1/25. This guide also includes system coding instructions.

Prospective Budgeting

Effective 3/1/25 all MFIP units will use prospective budgeting to determine eligibility and benefit level. All MFIP units will also use six-month budgeting periods effective 3/1/25.

Prospective budgeting is estimating the amount of monthly income a participant will have in the payment month. In prospective budgeting the budget month and payment month are the same.

When budgeting income prospectively only count income both the eligibility worker and the unit are reasonably certain they will get during their six-month budgeting period.

In the first month, for some units, budgeting income to determine the benefit amount is separate from budgeting income to determine eligibility. To be eligible, applicants must pass the initial income eligibility test and also be within the net income limits.

All income must be converted to monthly amounts when anticipating income using multipliers. Use the following multipliers depending on how often the income is received to determine the monthly income.

- Weekly = 4.3
- Biweekly/every other week = 2.15
- Monthly = 1
- Semi-monthly/twice a month = 2

Use income received 30 days back from the most recent pay stubs and/or other counted earned or unearned income verification based on the income received dates, for applications, six-month review or recertification as an indicator of the income that will be available during the next six-month period. Document in case notes, what income was used and why.

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Self-employment income does not use a multiplier. Self-employment income must be converted to a monthly amount prior to being enter in MAXIS. See [CM 0017.15.33.03 \(Self-Employment, Convert Inc. To Monthly Amt\)](#).

Consider the following when determining all prospective income:

- For self-employed persons choosing the 50% of gross income method, use gross business receipts that accurately indicate anticipated gross income. This means considering seasonal work or the fact that new business might not show any income. Using a timeframe other than 30 days of business records to determine countable income may be needed.
- Use all income already received in the application through the date of approval as an indicator of the income that will be available during the six-month budget period. When the date of application and the date of the interview are different, document in case notes what income was used.
- Use only anticipated income both the county agency or Tribal Nation and the client are reasonably certain will be received during the six-month budget period. Using a timeframe other than 30 days to determine countable income may be needed. Document this information in case notes.
- When the unit is unsure of the amount of income or when it will be received, count only that portion of the income that can be anticipated with reasonable certainty.
- If a client gives a reason that the amount an employer says it will pay is inaccurate, contact the employer for confirmation. Ensure that there is a signed release on file before contacting the employer, see [CM 0010.03 \(Verification – Cooperation and Consent\)](#) and [CM 0010.15 \(Verification – Inconsistent Information\)](#). If the employer's and participant's claims cannot be reconciled, budget the amount the participant expects to get. Document all actions in case notes.
- Do not use past income as an indicator of income that will be available during the six-month budget period if the unit cannot anticipate this income continuing in the future. Document in case notes why past income was not used.
- Convert regular recurring income received less often than monthly into a monthly amount.
- When income fluctuates to the extent that 30 days of income prior to the application month is not an accurate indication of anticipated income, use a reasonable period of time and income. Document in case notes the period of time and income used for the six-month budget period.
- When recalculating a new six-month budget period, consider income received in the last 30 days. Use any anticipated income the unit and county agency or Tribal Nation are reasonably certain will be received during the new six-month budget period. If the unit reports no change in income on the Combined Six-Month Review (DHS-5576) (PDF), continue to budget the same income for the next six-month budget period.
- If wages are held by the employer at the request of the participant, count this income in the month the wages would've been received by the participant.
- Budget COLA increases in federal benefits prospectively.

Reporting Requirements

Effective 3/1/25 all MFIP households have updated reported requirements. Six-month review forms will begin being sent out for September benefits. At a household's six month review they will be required to complete a Combined Six-Month Report (CSR) (DHS-5576) (PDF). The form is due by the 8th calendar day of the last month in the current six-month budget period. On this report, units are required to report all changes. A Combined Application Form (CAF) (DHS-5523), MNbenefits application or Household Updated Form (HUF) (DHS-8107) are acceptable in place of the CSR.

Applicants must report changes immediately while their application is pending.

All MFIP units are also required to complete the annual recertification process. At recertification, units are required to report all changes.

Units must report certain changes that affect their eligibility during their six-month budget period. These changes must be reported by the 10th of the month following the month of the change. When a change is reported on weekends, holidays or after hours, the date of the reported change is the next business day. However, if the 10th day lands on a weekend or holiday, consider the change reported timely.

Units may report changes through any means of contact with the county agency or Tribal Nation. This includes but is not limited to in-person, phone, mail or fax. When the unit reports a change to any member of the agency, it is considered reported to the entire agency. Workers within the county agency or Tribal Nation must share information the unit has reported amongst each other and act on changes timely. For a definition of Known to the Agency, see [CM 0002.35 \(Glossary: Inventory...\)](#).

When a unit does not report a required change timely overpayments need to be assessed, see [CM 0025.03 \(Determining Incorrect Payment Amounts\)](#).

During the six-month budget period, units are required to report the following changes:

- Any change in eligibility for Supplemental Security Income, Retirement Survivors Disability Insurance, or another federal income source
- Any change in address or residence, including a change in rental subsidy
- Any change in household composition, including the birth of a child(ren), someone moving in or out of the home or a change in parenting time
- When a unit member receives a Substantial Lottery or Gambling Winning. For the definition of a Substantial Lottery or Gambling Winning, see [CM 0002.65 \(Glossary: Substantial...\)](#)
- A change in citizenship or immigration status
- A change in family status of a unit member (marriage, legal separation, divorce, death)
- A change that makes the value of the assistance unit's assets at or above the \$10,000 asset limit.
- A pregnancy not resulting in a live birth
- A change in school attendance of a parent under 20 years of age
- An individual in the household who is 18 or 19 years of age attending high school who graduates or drops out of school

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The actions needed when these changes occur are identified below in the [Processing a change](#) section of this guide.

Six-Month Report Forms

The six-month review date is determined based off the Eligibility Review (ER) date entered on the [REDACTED] panel in MAXIS. Effective for benefit month 9/25 MAXIS will identify cases due for a 6-month review using the Eligibility Review (ER) date from [REDACTED]. A Combined Six-Month Review (CSR) form (DHS-5576) will be mailed 45 days prior to the review date. The CSR form is due by the 8th of the processing month.

MAXIS Coding Instructions

Processing the January HRF

All MFIP monthly reporters will need to be converted to six-month budgeting when processing the January HRF to determine March benefits. No additional HRFs will be sent or processed for MFIP.

When the HRF is received, review all information, and ensure all questions are answered (like normal) and all mandatory verifications have been provided. If the HRF is not received or is incomplete, the case will auto close.

When the HRF is complete begin to process it as normal. Update all applicable MAXIS [REDACTED] panels including [REDACTED].

Follow the guidance below for updating income panels.

Use the income verification provided with the HRF to anticipate the on-going income. Follow the guidance in the [Prospective Budgeting](#) section of this guide for prospective budgeting policy. [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

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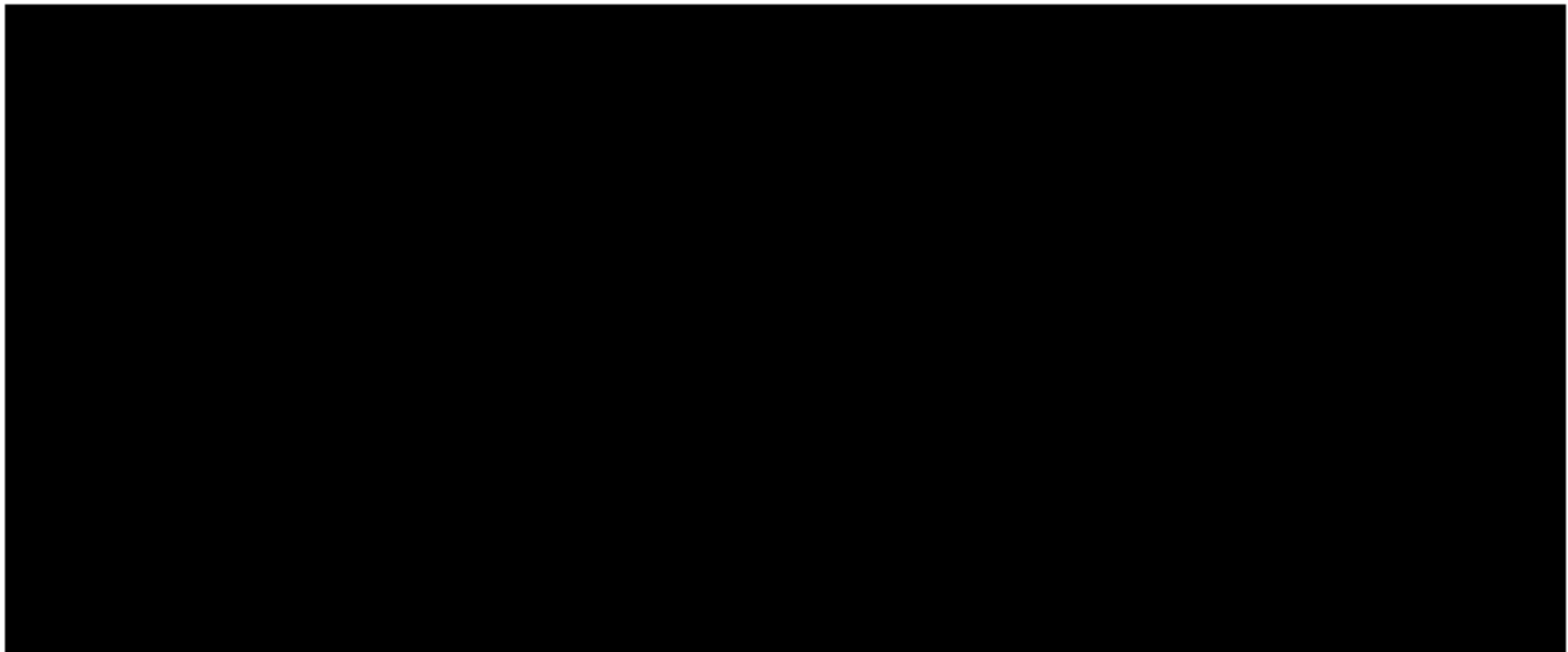
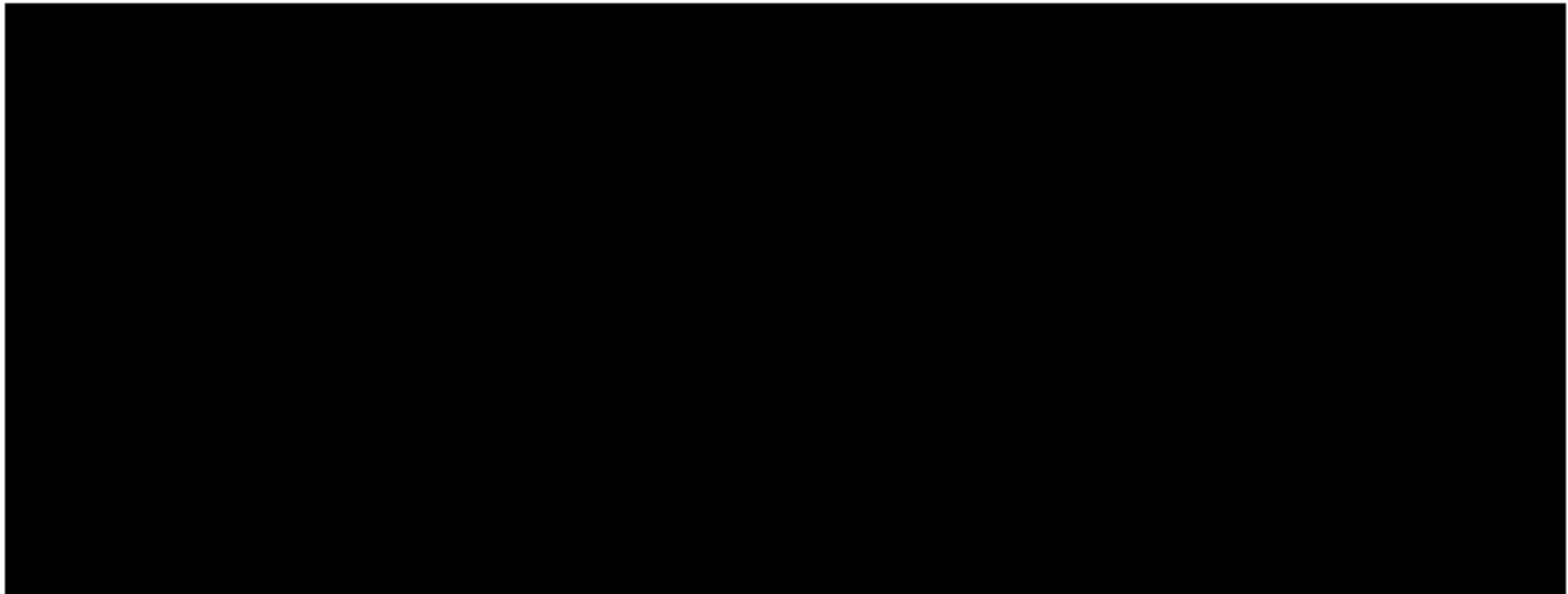
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For self-employment income, there is no change on how to enter income and hours on the [redacted] panel. [redacted]

Processing a New Application

Effective in the benefit month of 3/25 all MFIP cases are prospectively budgeted. Process the application as normal. Follow the instructions below for coding income.

For income panels, use the [redacted] when available to help in calculating the average income. Follow the guidance in the [Prospective Budgeting](#) section of this guide for prospective budgeting policy. Follow the specific panel information below depending on the types of income the case has.

Note: This document provides policy guidance for the public. To ensure security, system coding has been removed. Eligibility workers can find the system instructions in this guide on SIR.

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[Redacted]

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There is no change to how Self-Employment income is entered in MAXIS. [REDACTED]
[REDACTED]

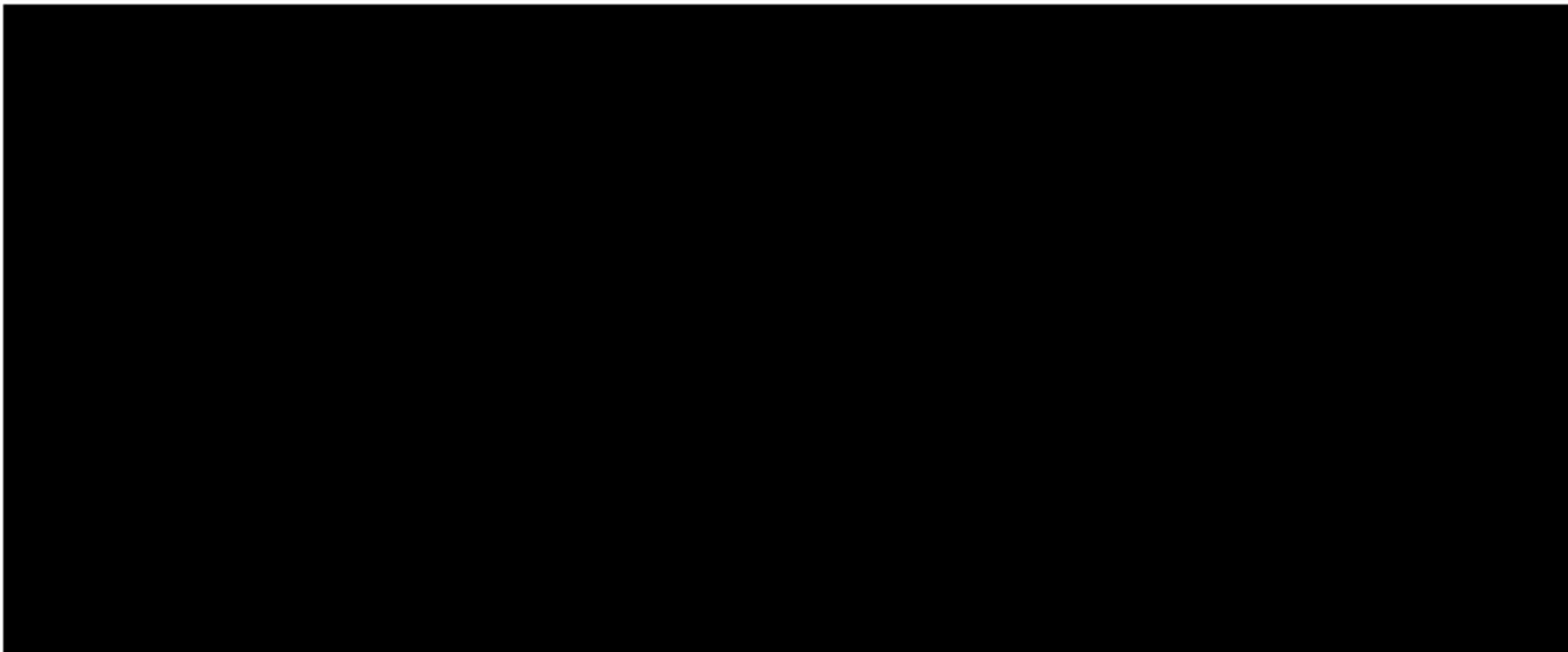
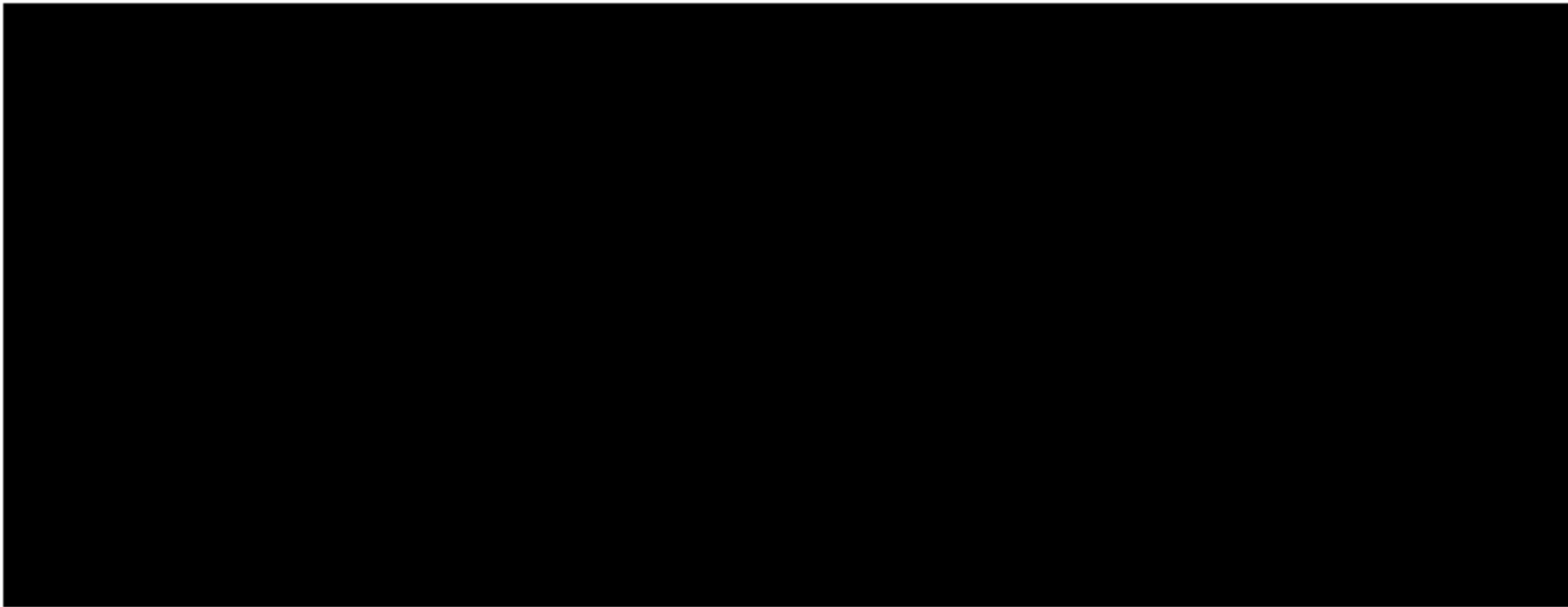
Processing a Recertification

Effective in the benefit month of 3/25 all MFIP cases are prospectively budgeted. Follow the guidance in the [Prospective Budgeting](#) section of this guide for prospective budgeting policy. Process the recertification as normal. Follow the instructions below for coding income.

For income panels, use the [REDACTED] when available to help in calculating the average income. Follow the specific panel information below depending on the types of income the case has.



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[REDACTED]

[REDACTED]

[REDACTED]

For self-employment income, there is no change on how to enter income and hours on the [REDACTED] panel. [REDACTED]

Processing a change

See the section of this document on [Reporting Requirements](#) for information on what changes are required to be reported. The information below provides additional policy information regarding changes and how to process those changes in MAXIS.

Increase in income ONLY:

An increase in income is not required to be reported during the six-month budget period. If an increase of income is reported during the six-month budget period, the benefit amount will not decrease due to the increased income. Do not request verification of the increased income. Follow up on the increase in income and request verification at the next six-month review or recertification.

Follow the instructions below for processing the case in MAXIS.

If the increase in income is due to a new source of income, enter the appropriate income panel. Enter \$0 in the prospective column of the panel. If the panel requires a pay frequency, use code "1" for one time per month. If there is an hours field, enter the anticipated hours for the month. MAXIS will have a pop-up warning message asking if entering the hours is correct. Follow the prompts. Enter detailed case notes of all actions taken.

If the increase in income is for a current source of earned income, do not update the income amounts of the panel. Update the hours field to reflect the newly reported hours. Document in case notes the report of income and follow up at the next six-month review or recertification.

If the increase in income is for a current source of unearned income, do not update the panel. Document in case notes the report of income and follow up at the next six-month review or recertification.

Decrease in income ONLY:

A decrease in income is not required to be reported by the participant.

If a decrease in income is reported confirm the decrease in income is expected to continue. Some examples of confirmation include but are not limited to having a conversation with the participant, a conversation with the Employment Services counselor, a conversation with the Child Support worker or receiving a completed employment verification form.

If the change is not expected to continue do not adjust the grant. If the change in income is expected to continue the grant may be increased. Verification is required before the grant can be increased. Request verification and follow the instructions below once verification has been received. If verification is not returned, do not adjust the grant.

Determine the effective date of the change. This is based on the date the change was reported, not verified.

In MAXIS, the month in which the decreased income is entered, and the change is effective is determined by the date the decrease in income was reported.

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- If the decrease in income is reported by the 10th of the month following the date of the change, the change is entered in the footer month of the date of the change.
 - For example, a decrease in income occurs on May 20th and is reported on June 5th, enter the change in the footer month of May.
- If the decrease in income is reported any time after the 10th of the month following the date of the change, the change is entered in the footer month of the date the change was reported.
 - For example, a decrease in income occurs on May 20th and is reported on June 15th, enter the change in the footer month of June.

In both instances there is no proration. Review the case and determine if supplements are due back to the beginning of the appropriate month. Follow the coding instructions below depending on if the source income continues with a decrease or ends. Remember to document all actions taken in case notes including how the continued decrease in income was confirmed and verified.

Income Continues with a Decrease:

Update the appropriate panel for the decreased income source. Follow the guidance in the [Prospective Budgeting](#) section of this guide for prospective budgeting policy. Use the SNAP PIC when available to help calculate the average income. Follow the specific panel information below depending on the type of income decrease.

[Redacted content]

[Redacted content]

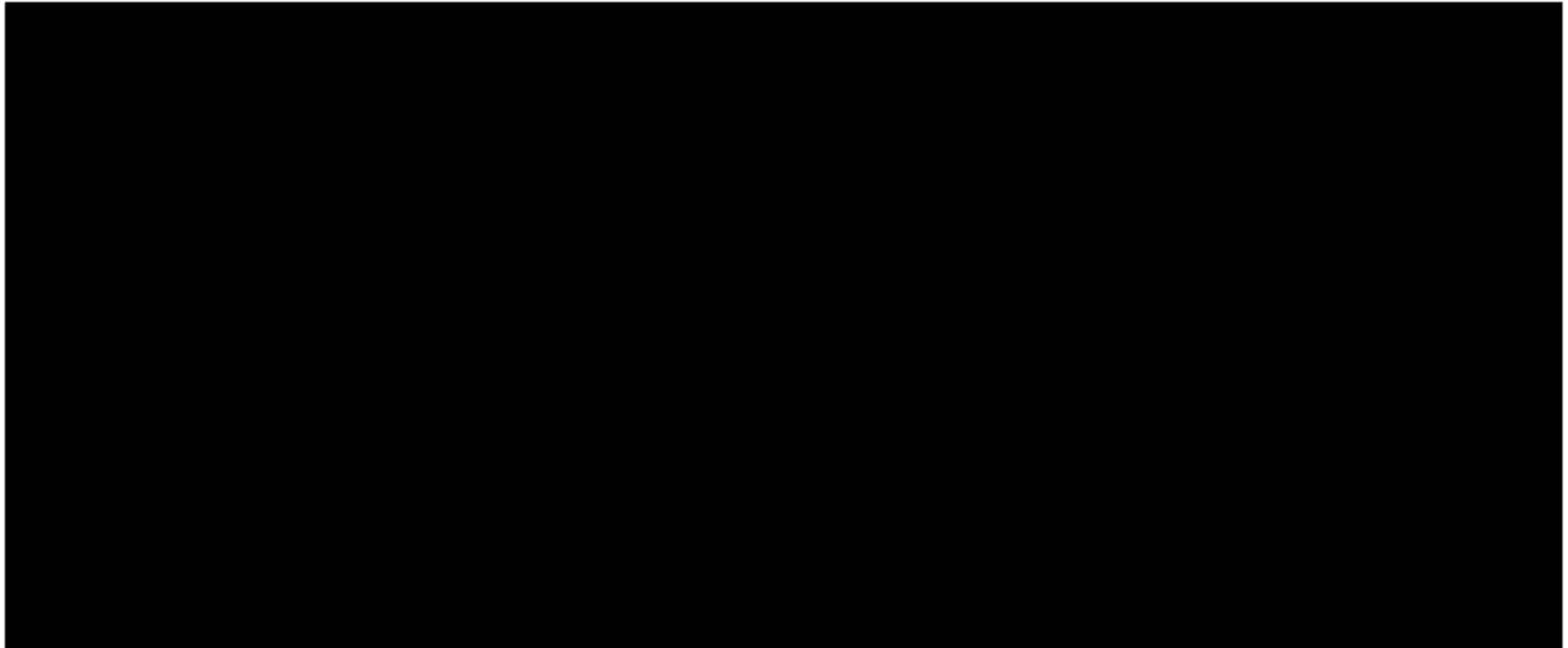
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For self-employment income, there is no change on how to enter income and hours on the [redacted] panel. [redacted]
[redacted]

Once all the panels have been updated review your results and approve the increased grant. Remember to document all actions taken in case notes.

Income Ending:

Update the appropriate income panel for the source of income ending. Put the verified last payment date on the income ending field of the appropriate income panel. Remove the income from both the retrospective and prospective sides of the panel. Remove the hours from both sides of the panel as well. Review results through [redacted] and approve the increased grant. Remember to document all actions taken in case notes.

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Change in eligibility for RSDI

If there is a decrease in overall HH income due to the change in RSDI eligibility, update the [REDACTED] panel with the RSDI income change.

Follow the [REDACTED] instructions for the RSDI income exclusion found on SIR and approve the increased grant.

If there is an increase in overall HH income due to the change in RSDI eligibility, document the change in case notes and create a [REDACTED] to follow up at the next six-month review or at recertification whichever comes first.

Adding a Household Member

Follow the guidance in [CM 8.06.06 Adding A Person To The Unit – Cash](#). Reassess eligibility for the whole unit. Update and/or add all appropriate [REDACTED] panels.

Follow the guidance in the [Prospective Budgeting](#) section of this guide for policy information on prospective budgeting. If the unit has income, follow these instructions to enter or update the income panels.

Use the [REDACTED] when available to help calculate the average income. Follow the specific panel information below depending on the types of income the case has.

[REDACTED]

[REDACTED]

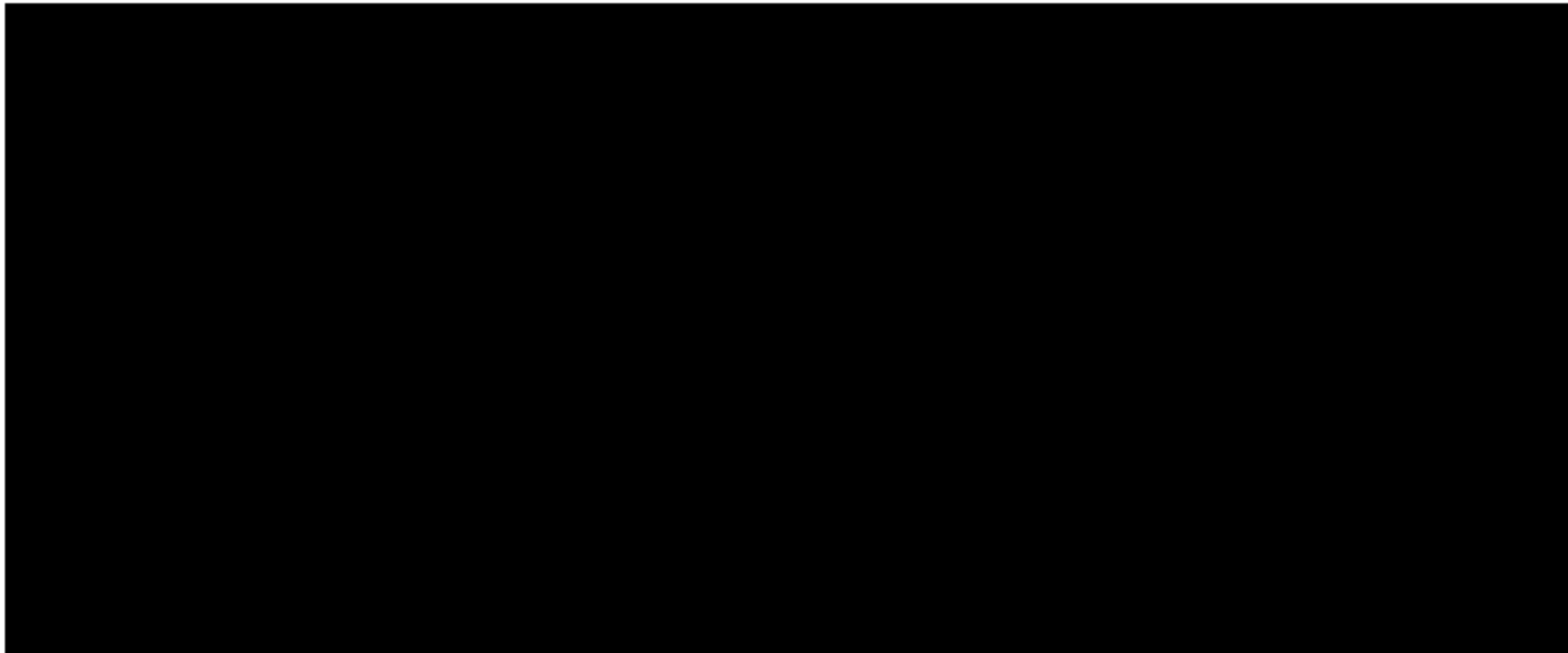
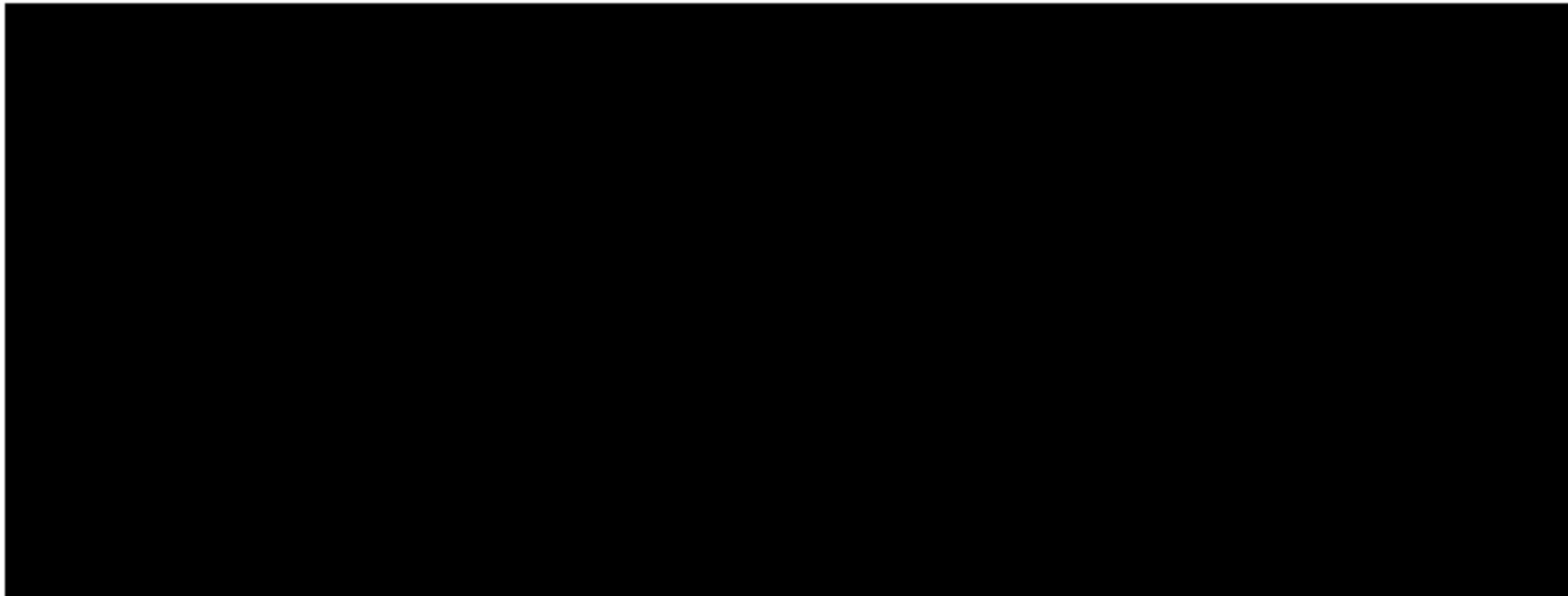
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For self-employment income, there is no change on how to enter income and hours on the  panel. .

If the family is ineligible with this new individual, follow normal procedures to close the case and redetermine SNAP eligibility.

If the family remains eligible with the new unit member, approve the new eligibility results.

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Cash Prizes and Winnings Above \$4500

If this asset in combination with other reported assets puts the unit over the asset limit, verification of current assets is required. Once verification is received, if the unit remains over the asset limit, follow the guidance CM 15.75. There is no process change to closing a case for being over assets or reopening a case once assets have been reduced.

Child Support

Child support will still be issued on cases monthly. Review the messages and consider the following:

Is the child support amount within the realm of past history or information used to prospectively budget this income? There is no set amount or parameters considered when deciding if income is “within the realm”. When the change in income falls within or close to the previous amounts used, it is “within the realm.”

If the answer to this is yes, then there is no change in the income calculation.

If the answer to this is no, then determine if the change is an increase in income or a decrease in income. Follow the guidance in the [Increase in income](#) section or the [Decrease in income](#) section of this guide on how to process the change.

Suspensions

Effective 3/1/25, MFIP cases may no longer be suspended. With the change to prospective budgeting, there is no longer a suspension policy for MFIP cases. Until the system is updated, MAXIS will ask if the worker want to suspend or close the case. Do not suspend the case. Close the case if the unit no longer meets the MFIP eligibility requirements and redetermine eligibility for SNAP benefits.

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Uncle Harry Food Support (UHFS) Six-Month Reporting

Use this section to learn more about the policy changes occurring 03/01/25 and the system workaround requirements.

Note: These workaround steps need to be completed each time an application, recertification, six-month review or change is processed in MAXIS. It will also need to be completed for monthly reporters submitting their last Household Report Form (HRF) in 02/25 for 03/25 benefits.

Budgeting Income Changes

Effective 03/01/25 all UHFS units will follow SNAP prospective budgeting policies that are found in Combined Manual [22.03.01.03 \(Prospective Budgeting – SNAP Provisions\)](#). In order to determine what income to budget for the certification period have a conversation with your client about the verification of income they provided and what they are reasonably certain they will continue to receive in the future. Document this income in MAXIS [REDACTED].

For more training information on prospectively budgeting income for UHFS, see the [SNAP Anticipating Income](#) training on the Training Toolkit of SIR.

[REDACTED]

[REDACTED]

[Redacted]

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Budgeting Income Workaround

[Redacted]

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For more information on budgeting self-employment income and entering this into MAXIS, see the [Self-Employment Guide](#) located on the Training Toolkit of SIR.

UHFS Reporting Changes

Reporting Change Effective 03/01/25

Effective 03/01/25 UHFS units will either be change reporters or six-month reporters. The criteria for who is defined as a change reporter as well as their reporting requirements and when they complete a recertification has not changed.

Change reporters are units that meet one of the following:

- All members are homeless.
- All members are in the migrant work stream.
- Any member is a seasonal farm worker.
- All adult members are elderly/disabled without earned income.
- Are living on an Indian Reservation.

All units that do not meet the criteria above are six-month reporters.

Six-Month Reporters are required to complete a Combined Six-Month Report (CSR) (DHS-5576). This is due by the 8th of the month of the last month in the current six-month report period. On this report units are required to report all changes.

Six-Month Reporters are also required to complete the recertification process. At recertification, units are required to report all changes.

Change reporters do not complete a Combined Six-Month Report but are required to complete the recertification process. At recertification, change reporting units are required to report all changes.

During the certification period six-month reporters and change reporters have different reporting requirements. These are highlighted in the table below.

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Change Reporters	Six-Month Reporters
<p>Must report all changes at recertification. During the certification period must report:</p> <ul style="list-style-type: none"> • A change of more than \$125 per month in gross earned income. • A change of more than \$125 in the amount of unearned income, EXCEPT changes relating to public assistance (PA). • A change in the source of income, including starting or stopping a job, if the change in employment is accompanied by a change in income. • A change in unit composition. • A change in residence. • A change in shelter costs (housing and utilities) due to a residency change. • A change in legal obligation to pay child support. • Time-limited SNAP recipients (TLR) need to report when their work hours fall below 20 hours per week, averaged 80 hours monthly. Work includes paid employment, self-employment, in-kind, and unpaid work. • When a unit member receives a Substantial Lottery or Gambling Winning. For the definition of Substantial Lottery or Gambling Winning, see Combined Manual 2.65 (Glossary: Substantial...). Send in a PolicyQuest (PQ) when a unit reports a Substantial Lottery or Gambling Winning to determine how to process this change. 	<p>Must report all changes at six-month review and at recertification time. During the certification period must report:</p> <ul style="list-style-type: none"> • When the unit’s gross income exceeds 130% of the Federal Poverty Guidelines (FPG) for the unit’s size. Use the FPG for unit’s size at the time of the most recent application or recertification. See Combined Manual 19.06 (Gross Income Limits). If the unit is already certified with income above 130% FPG, the unit does not need to report changes until the next renewal. Add a worker comment to the approval notice letting the unit know of these modified reporting requirements. See POLI/TEMP Manual TE02.05.19 (SNAP Notices – Add Worker Comments) for the sample text to add to the approval notice. • When a Time-limited Recipient’s work hours fall below 20 hours per week, averaged 80 hours monthly. Work includes paid employment, self-employment, in-kind, and unpaid work. See Combined Manual 11.24 (Time-limited Recipients). • When a unit member receives a Substantial Lottery or Gambling Winning. For the definition of Substantial Lottery or Gambling Winning, see Combined Manual 2.65 (Glossary: Substantial...). Send in a PolicyQuest (PQ) when a unit reports a Substantial Lottery or Gambling Winning to determine how to process this change.

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Reporting System Workaround

Effective 03/01/25, MAXIS will identify change reporters, but will not automatically identify which UHFS units will be six-month reporters.

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Household Report Forms (HRFs)

The last Household Report Form (HRF) for UHFS cases will be processed for 03/25 benefits. This will be based on all changes reported for the month of 01/25. The HRF must be received in order for monthly reporting cases to receive their 03/25 benefits. If they do not provide the HRF, their case will auto close. If they provide the HRF within 30 days of their case closing, the case can be reinstated with no proration. Once the HRF and all mandatory information is received to process it in MAXIS, follow the steps below to process the HRF.

[REDACTED]

Six-Month Reviews

UHFS units will follow SNAP policy and procedures for processing six-month reviews. The budgeting and reporting workarounds will need to also be completed until MAXIS is automated. See the SNAP Six-Month Review Training (Course ID TES705) on [TrainLink](#) for more information on processing six-month reviews.

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Six-Month Review Dates

Six-month review dates will need to be entered on the “Food Support Reports” pop up window on [REDACTED] for any UHFS cases subject to six-month reporting.

When processing a new application or a recertification for 03/01/25 and ongoing, the six-month review date will be six-months from the date of the application. For example, when the application/recertification is received in 04/25, the six-month review date will be 10/25. The next annual recertification will be 04/26.

When processing a six-month review, the next six-month review date will be a year from the current six-month review. For example, when the six-month review is for 05/25, the next six-month review date will be 05/26 and the next recertification will be 11/25.

When processing the Household Report Form for 03/25 benefits or processing a change during the certification period on 03/01/25 or after, set the Six-Month review date based on the current yearly renewal date.

- The six-month review date must be calculated **out** six months if yearly renewal date is 03/25 through 09/25.
- The six-month review date must be calculated **back** six months if yearly renewal date is 10/25 through 02/26.

Use the table below to determine the next six-month review date based on the instructions listed above.

Next Recertification Date	Six-Month Review Date
03/01/25	09/01/25
04/01/25	10/01/25
05/01/25	11/01/25
06/01/25	12/01/25
07/01/25	01/01/26
08/01/25	02/01/26
09/01/25	03/01/26
10/01/25	04/01/25

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11/01/25	05/01/25
12/01/25	06/01/25
01/01/26	07/01/25
02/01/26	08/01/25

Recertifications

UHFS units will follow SNAP policy and procedures for processing recertifications. The budgeting and reporting workarounds will need to also be completed until MAXIS is automated. See the [SNAP Recertification Guide](#) on the SNAP Resources Page of SIR for more information on processing recertifications.

Child Support

Effective 03/01/25 UHFS cases will follow SNAP prospective budgeting policies for budgeting child support income. See the [Guidebook about Child Support and SNAP](#) located on the Training Toolkit of SIR for more instructions.

Child support DAILs will continue to be issued on cases monthly. Review the [REDACTED] messages and consider whether the child support amount is within the realm of the past information used to prospectively budget this income. If so, do not update the income amount. [REDACTED] that the income was reviewed, and the budget was not updated due to the child support amount being within the realm of the previous amount budgeted.

When the child support amount on the [REDACTED] message is not within the realm of what was previously budgeted, follow the guidance in the [Guidebook about Child Support and SNAP](#) to update the budget. When the case is updated, be sure to follow the guidance in the [Budgeting Income Changes](#) and the [Reporting System Workaround](#) sections to update and code MAXIS correctly.

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General Assistance (GA) Workaround Instructions

Effective 3/1/25, all GA cases will be prospectively budgeted. GA cases with \$100 or more in earned income per month will be subject to six-month reporting. To apply changes to cases subject to six-month reporting, follow all work-around steps listed below.

Until MAXIS is updated, for full implementation and accurate results, all steps must be completed for every case change requiring a program approval starting with the benefit month of 03/2025 and later.

Note: There is no workaround to change GA cases to 6-Month reporting as it doesn't exist for GA.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Note: This document provides policy guidance for the public. To ensure security, system coding has been removed. Eligibility workers can find the system instructions in this guide on SIR.

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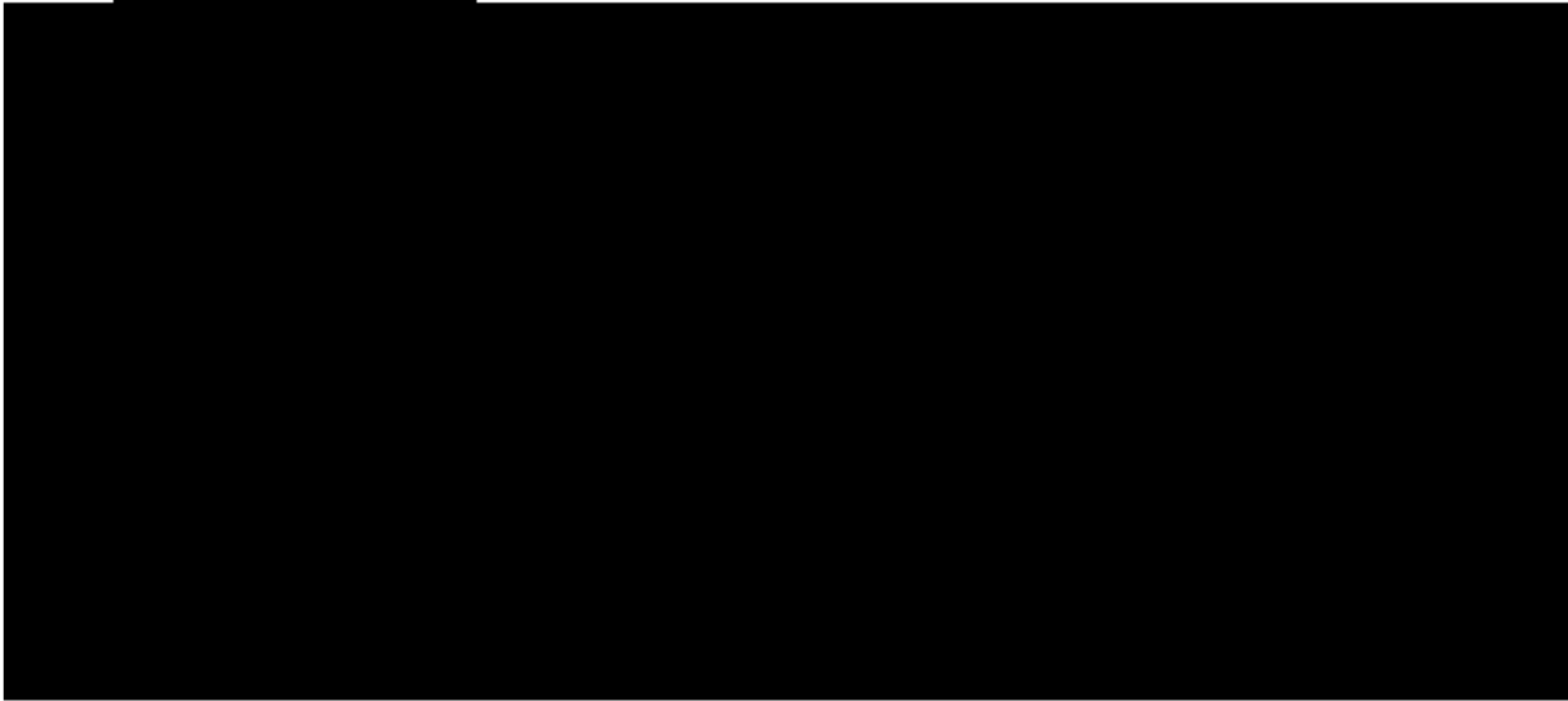
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Note: This document provides policy guidance for the public. To ensure security, system coding has been removed. Eligibility workers can find the system instructions in this guide on SIR.



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