Six-Month Budgeting Questions and Answers for Cash Programs and Uncle Harry Food Support (UHFS)

This document contains questions and answers about six-month budgeting. Some questions have been consolidated or reworded for clarity. Not every question submitted is included here.

For questions, please submit a PolicyQuest.

Key: Answers highlighted in blue have been updated. Questions highlighted in yellow have been added.

Minnesota Family Investment Program (MFIP)

1. **Question:** Will participants be notified of the change?

   Answer: Yes. A special notice was sent on March 7th.

2. **Question:** Why doesn't the guide contain [redacted] instructions for MFIP?

   Answer: There is no need to [redacted] MFIP cases to prospective budgeting. Monthly report forms and auto-close functionality has been disabled starting with April benefits. This allows cases to remain open prospectively while system automation is being completed. Unless there is a change that is required to be reported that would affect MFIP eligibility. Follow guidance outlined in The Guide to Six-Month Budgeting on how to update income panels to ensure the correct income is being counted

3. **Question:** Will all cases now have reviews or recertifications in March and September instead of staggered dates?

   Answer: No. The six-month review date will be determined based off the Eligibility Review date entered on the review panel in MAXIS as part of system automation starting with the 9/25 benefit month, these cases would be identified due to their 3/26 recertification date. **NOTE:** Do NOT manually update the review panel unless processing a recertification. When processing the rectification continue to follow current procedures and update the panel with the next recertification date.

4. **Question:** When processing a Jan/March HRF, what do I do if a participant reports income ending or income starting?

Answer: If a participant reports their income ended, this can no longer be anticipated to continue and would not be budgeted prospectively. You should enter the income end date on the face of the panel and leave the retrospective and prospective side of the panel blank.

If a participant reports new income starting on or after 2/1/25, use a generic income start date of 1/1/25 and enter the anticipated income on both the retrospective and prospective side of the [redacted] panel. Document in a separate case note the change to the income start date.

5. **Question:** How are [redacted] messages to be handled?

   Answer: The verification request must be sent per current policy. If verification is not returned, the case must close, allowing for proper notice. If verification is returned, follow the Guide to Six-Month Budgeting information on increases and decreases in income.

6. **Question:** If a change in income becomes known to the agency, but the participant did not report it, can the agency act on this?

   Answer: Changes in income are not required to be reported. Follow the guidance regarding an increase in income or a decrease in income found in the Guide to Six-Month Budgeting.

7. **Question:** If a participant reports a decrease in a current source of income, when is the benefit amount adjusted?

   Answer: Change is reported timely (by the 10^{th} of the month following the month of the change): The benefit amount is adjusted for the month the decrease happened. Example: The participant reports on 5/8 that their income decreased on 4/15. Confirm the change is expected to continue, request verification of actual income received in April and determine the amount of income that can be anticipated ongoing. Once verification is received update the 04/25 footer month with actual income and issue a supplement if there is an increase in the benefit amount. Update 05/25 footer month to reflect anticipated income and approve a new benefit amount.
   Note: If the change was reported timely, the decrease takes effect the month the change occurred, regardless of when verification is received.

   Change is not reported timely: The benefit amount is changed for the month the decrease was reported. Example: The participant reports on 5/20 that their income decreased on 4/15. Confirm the change is expected to continue ongoing and request verification of ongoing income. Once verification is received, update the 05/25 footer month with the newly anticipated income amount and approve a new benefit amount. **Note:** When the change is not reported timely, the decrease takes the effect the month the change was reported, regardless of when verification is received.

8. **Question:** If a participant reports a current income source has ended, when is the benefit amount adjusted?

Answer: Change is reported timely (by the 10th of the month following the month of the change): The benefit amount is adjusted for the month the decrease happened. Example: A participant reports on 5/8 that their income ended on 4/15. Request verification of actual income received in April and date income ended. Update the income panel in the footer month of 04/25 with actual income and income end date. Issue a supplement if there is an increase in the benefit amount. Update the income panel in the footer month of 05/25 to reflect the income end date and remove the income from both the retrospective and prospective sides of the panel.
Note: If the change was reported timely, the decrease takes effect the month the change occurred, regardless of when verification is received.

Change is not reported timely: The benefit amount is changed for the month the decrease was reported. Example: A participant reports on 5/20 that their income ended on 4/15. Request verification of income ending. Once verification is received, update the 05/25 footer month with the income end date and approve a new benefit amount.
Note: When the change is not reported timely, the decrease takes the effect the month the change was reported, regardless of when verification is received.

9. **Question:** How is a significant change processed?

   Answer: There are no longer significant changes.

10. **Question:** How does a worker process a change in SSI eligibility during the six-month budget period?

    Answer: A change in SSI eligibility is a change in household composition. If an individual that was excluded from the unit due to SSI, no longer has SSI eligibility, Follow MFIP Adding a Household Member in the Guide to Six-Month Budgeting. If an MFIP unit member gains SSI eligibility, follow CM 14.06 - Who Must be Excluded from Assistance unit and CM 08.06.09 - Removing a Person from the Unit

11. **Question:** How will participant work hours be reported monthly as it related to the work participation rate?

    Answer: Work hours will continue to be tracked in MAXIS by the eligibility worker. The hours will be prospectively determined to get a monthly average and will be entered into MAXIS for reporting purposes. The hours will remain the same for each month until their6-month review or recertification, whichever comes first.
    Counties and Tribal Nations should not concentrate on the WPR. Instead, the focus should continue to be on the Self-Support Index and work outcomes

12. **Question:** How will we track and verify if an employed extended participant is meeting their monthly 30 hours/week requirement with six-month budgeting?

    Answer: Policies around eligibility for extensions have not changed. However, with 6-month budgeting, instead of participants submitting work hours each month, the hours will be prospectively determined/projected by the eligibility worker for 6 months using a monthly average until their 6-month review or annual recertification, whichever comes first.

The employment counselor's role has not changed with 6-month budgeting. Employment counselors will continue to work with participants as usual, maintain monthly or more frequent contact depending on the activities in the employment plan, update the plan when there are changes, and continue to share information with the eligibility worker and vice versa per the "Known to the agency" policy (ESM 2.24 or CM 2.35).

For the employed extension, current policy allows 30 days for participants to increase hours when work hours have decreased and must review the case for another extension reason, before the case is closed for no extension. The 10-day notice requirements for closure/adverse actions still apply (ESM 18.18.3 or CM 11.33.03).

12. **Question:** How will 6-month reporting impact sanctions?

    Answer: There are no changes to sanctions.

Uncle Harry Food Support (UHFS)

Income and Deductions

13. **Question:** In situations where the client provides verification of their earned income (such as paystubs), but this verification is not a reflection of their anticipated hours ongoing, do we need to request additional verification of the anticipated hours, or can we use the verification along with the client's verbal statement to budget the income?

    Answer: You can use the client's verbal statement along with anticipated hours to budget the income ongoing as long as the verification received verifies the client's name, the employer, how often they are paid and their rate of pay. [redacted] the verification received, the conversation with the client and what was budgeted and why this was budgeted. See the SNAP Anticipating Income Guide on the Training Toolkit of SIR for more information.

14. **Question:** For UHFS units when a client starts or stops a new job, do we use a 1 in the "Payment Frequency" field of PIC for the month of the start or stop work like we do for SNAP? Or always use the multiplier?

    Answer: Effective 03/01/25 UHFS will follow SNAP prospective budgeting policies and procedures. When income starts or stops in the application month, following the guidance in [redacted] (Processing SNAP Applications – Income Starts) and [redacted] (Processing SNAP Applications – Income Ends). For a new job that is anticipated to continue, use the multiplier when calculating the prospective monthly income.

15. **Question:** How are we budgeting child support income effective 03/01/25?

Answer: Child Support income for UHFS will be prospectively budgeted following SNAP policies and procedures. For more information, see the Guidebook about Child Support and SNAP.

16. **Question:** Regarding UHFS and child support prospective budgeting, is it not correct that we should always convert Child Support amounts received into monthly amounts (like if client usually receives CS weekly or bi-weekly) and then use pay frequency of monthly on the [redacted]

    Answer: The examples listed in the Guidebook about Child Support and SNAP are using several months of income to prospectively budget child support. In these examples, the clients are paid more than once per month, so the worker has converted the payments to monthly amounts in order to enter more than one month of income into the [redacted]. This is also correct if this is the best reflection of anticipated income. When using one month of income to prospectively budget, you can enter in several payments into the [redacted] rather than converting this to a monthly amount when this is the best reflection of anticipated earnings.

17. **Question:** Why on the jobs panel are we only listing 1 payment for the month instead of probable pay dates? Such as someone gets paid every 2 weeks, for projected income, wouldn't we put in the probable pay dates and income per Pay period instead of just one monthly amount?

    Answer: Currently MAXIS budgets the income information listed on the face [redacted] and [redacted] whereas MAXIS uses the [redacted] for the stand-alone SNAP cases. Starting 03/01/25 the [redacted] needs to be used to prospectively budget income for UHFS as well as stand-alone SNAP. However, MAXIS is not yet programmed to read income from the PIC for UHFS cases. Therefore, the best workaround is to use the [redacted] to determine the prospective monthly amount of income and then enter this on the face of [redacted] or [redacted] so MAXIS is budgeting the correct income with this policy change.

18. **Question:** Do workers still need to act on income increases and decreases during the client's certification period?

    Answer: Yes, both income increases and decreases still need to be acted on for UHFS cases. Follow the guidance in CM 08.06.01 (Processing Changes – Program Provisions) to process these changes.

19. **Question:** What is the dollar amount of "within the realm" for Child support?

    Answer: There is no set dollar amount for "within the realm." This is based on the original conversation you had with the client about anticipated income when the income was budgeted. When there are income fluctuations you need to determine if these fluctuations are within the realm of the previously budgeted income. If they are, [redacted] that this was reviewed, and no action was taken to update the budget. When they are not within the realm, have a conversation with the client about this change and whether it is anticipated to continue. Adjust the budget based on this new conversation about anticipated earnings.

For example, a client receives between $200 - $250 per month in child support. Based on the conversation with the client, this range of income is anticipated to continue and the average of $225 is budgeted per month. Several months later, the worker receives a [redacted] message indicating the client received $240 in child support. This is within the realm of previously budgeted income. Had the Child Support [redacted] amount been $280, this would not be within the realm of previously budgeted income.

20. **Question:** When processing the 03/25 HRFs based on the 01/25 income, do we need to call each client and ask them about their anticipated earnings before budgeting this income?

    Answer: The" Household Report Form" subsection under the "Uncle Harry Food Support Six-Month Reporting" section of the guide states, "The 01/25 income verifications received for the 03/25 HRF may be used in the prospective budget ongoing as long as this income is a reflection of anticipated earnings. If the income is no longer a reflection of anticipated earnings, it is appropriate to use income from a different time period or another form of verification for anticipated earnings."

    For UHFS you therefore do not need to call each case to have a conversation. However, if the unit indicates on the HRF that there are changes to their income, follow up with the unit to determine what is best to prospectively budget 03/01/25 and ongoing.

21. **Question:** Are UHFS units eligible for a shelter deduction even if they are not responsible to pay the rent?

    Answer: CM 22.24 (Uncle Harry Food Support Benefits) states, "UHFS units are allowed the maximum shelter deduction regardless of whether they are eligible for shelter or utility deductions. Units with elderly (people age 60 or older) or disabled individuals are allowed either the maximum shelter deduction, or the full cost of shelter when the costs exceed 50% of net income. In order to receive the full costs of the shelter expenses they must be eligible for a deduction. Do not prorate shelter costs between MFIP and UHFS units. See 0012.15(Incapacity and Disability Determinations), 0018.15 (Shelter Deductions). See TEMP Manual [redacted] (Uncle Harry Food Support Tip Sheet) for instructions on how to code MAXIS to ensure the correct calculation."

    UHFS units are therefore eligible for the maximum shelter deduction even if they are not responsible to pay. However, to receive above the maximum amount they need to be elderly or disabled and be responsible to pay shelter costs that will exceed the maximum when MAXIS calculates the adjusted shelter cost amount.

    Please also see the Instructions for Processing UHFS Elderly or Disabled Shelter Deductions for more information.

System Workaround Instructions

22. **Question:** Do we have to [redacted] results each month that we receive [redacted] messages?

Answer: No. [redacted] is only needed when the unit is subject to six-month reporting and there is a change being processed on the case. If there are changes needed to the case based on the information received from the [redacted] and the case is subject to six-month reporting, the case will need to be [redacted] to tell MAXIS the case is a six-month reporter prior to re-approving [redacted] results. See the Guide to Six-Month Budgeting on the Worker Resources page of SIR for more information on these [redacted] instructions.

23. **Question:** How will MAXIS know to send UHFS cases a Combined Six-Month Report Form for cases that are subject to change reporting?

    Answer: Currently UHFS units that do not meet any of the criteria to be monthly reporters are change reporters. Change reporters are not required to complete a six-month review and will not need to be FIATed.

24. **Question:** For cases that are subject to six-month reporting and will have their first six-month review 04/01/25, how will MAXIS know to send this review?

    Answer: When the case is subject to six-month reporting, follow the [redacted] instructions in the Guide to Six-Month Budgeting to tell MAXIS that the unit are six-month reporters. This [redacted] process will also tell MAXIS to send out a six-month review and track for the return. There may be some circumstances where the case is [redacted] too late to send out a six-month review for 04/01/25. We are not asking workers to manually track these cases at this time.

Other Questions

25. **Question:** Do UHFS unit follow the homeless definition for SNAP?

    Answer: Yes, UHFS units follow the homeless definition for SNAP.

General Assistance (GA)

26. **Question**: If someone starts a job and works 2 months and then no longer works, do they stay on six-month reporting or are they just annual reporters after that?

    Answer: For GA, if the client reported they stopped working (i.e. not earning >$100/month so no longer eligible for six-month reporting), change them from six-month to annual in the next available benefit month.

27. **Question**: Does six-month reporting apply to GA recipients at MSOP who participate in the vocational work program?

    Answer: Yes, six-month reporting applies to all GA clients with earnings >$100/month, including MSOP residents. Whether that income is countable is not relevant. Clients must report earned income regardless of whether such income is countable. They must report all earned income so the agency can determine if it is countable.

28. **Question**: For GA, how do we handle the hours field on the main [redacted] panel? The field is required but the GRH pop-up does not provide an average hours calculation. Please provide guidance on handling the hours field.

    Answer: The [redacted] allows one of 2 methods to determine prospective income.
    - Actual Income and hours – if this method is selected, the worker should take the hours on the checks, then divide into how many ‘checks’ the client would receive in the prospective month(s).
    - Anticipated Income and hours – if this method is selected, the worker should take the hours on that were used to anticipate the income, then determine how many per ‘paycheck’ and use that amount.

    The hours field on this panel is not used for GA purposes or reporting so an estimate is sufficient.

29. **Question**: Are non-SSI MSA recipients now subject to prospective budgeting and six-month reporting?

    Answer: No, the MSA program is not affected by this legislative change. Non-SSI MSA clients with earned income will remain monthly reporters, and retrospectively budgeted.

Refugee Cash Assistance (RCA)

Workers should refer to the RCA Six-Month Budgeting bulletin #25-06-01 for how to implement the six-month budgeting policy for RCA. Below are the Q&As that are listed in the bulletin and shared here in this section. Typically, we don’t usually put the same information in multiple locations, but we believe that due to accessibility to resources, it would be good to have the initial Q&A from the bulletin here. Any future RCA Q&A will only be kept here in this document.

30. **Question:** Can the RCA benefits change during the six-month budget period?

    Answer: Yes, you can make changes only if the reported changes increase the amount of RCA benefits the unit is eligible to receive, provided the unit verifies the changes and continues to meet all other RCA eligibility requirements.

    Workers must also act on required reported changes, whether they increase or decrease benefits. For the required reporting changes, see section II (b)(1).

31. **Question:** Can participants report a change in income during the six-month budget period?

    Answer: Yes, it is beneficial for people on RCA to report income changes, especially when income decreases, as this could increase their benefits for ongoing until the next review. Before making any changes to income, contact the unit to determine if the changes are expected to continue ongoing and request verification. A new approval action must be taken if the verified income change results in an increase to the benefits.

32. **Question:** When the unit's income is verified to have ended or continues with a decrease, how do we apply that to the RCA case during the budget period?

    Answer: If the decrease is reported by the 10th of the month following the month the decrease occurred, the worker must verify and review for a supplement for the month when the change occurred. If the change is reported after the 10th of the following month, it must be verified and reviewed for a supplement for the month it is reported. MAXIS may not allow you to approve the past month's supplement. Therefore, the supplement needs to be issued manually.

    For example:

    If income decreases on May 20th and is reported on June 5th, the change will be considered for May.

    If income decreases on May 20th and is reported on June 15th, the change will be considered for June.

33. **Question:** What happens if the agency learns of unreported income other than the required reporting items under section II (b)(1), which decreases the program benefit or exceeds the program standard during the budget period?

    Answer: The benefit stays the same until the budget period is up for review. Case note the information reported and set a [redacted] to follow up at the next review. Do not take any action until the next review. During the review period, review all changes and request verification.

34. **Question:** Will participants be notified of this policy change?

    Answer: Yes. The state will send a one-time special notice in March 2025 to cases that are impacted by this new policy change.

35. **Question:** What does it mean that RCA still requires a monthly check-in?

    Answer: The check-in is to follow up with the people on RCA to see how they are doing, how their employment services and search are progressing, and if they need additional resources connections or assistance. RCA participants are new arrivals within 12 months in the United States, and navigating their new life here may be complex, and they face many new barriers. The monthly check-in is required to ensure they have active support to address those early barriers. The check-in can be over the phone, in person, or via electronic communication.

36. **Question:** Will there be a form to conduct the RCA monthly check-in?

    Answer: No, a form is not required. This can be done verbally, and case noted. The CM will be updated to cover this.

37. **Question:** How do we handle RCA if a participant is verified and approved for SSI?

    Answer: SSI is one of the required reporting changes that must be reported by the 10th of the following month. Once SSI is verified approved for someone, close (or approve the decrease if another unit member is still eligible) RCA for the next available month, allowing 10-day notice.

38. **Question:** What amount must the client report for the cash prizes and lottery winnings?

    Answer: The RCA amount for the cash prizes and lotteries aligns with the SNAP policy amount. The client must report their cash prizes and lottery winnings; however, only take action if the reported amount exceeds the asset limit. See CM0002.65 – Glossary: Substantial, under Substantial Lottery or Gambling Winning definition.

    If the reported amount exceeds the limit and the unit's combined assets are $10,000.00 or above, request asset verification. See CM0015.75 – Excess Assets – Participants.

39. **Question:** Will the worker need to update the review dates in MAXIS?

    Answer: No. Workers do not need to worry about the review dates. Prior to system implementation, the worker will not be allowed to enter a [redacted] six-month review date, so no updates are required.

    When six-month and prospective budgeting changes are implemented in the system, a batch job will be run to handle active RCA cases. This job will determine the Six-Month report date based on the ER date and update [redacted] Workers will be required to determine and enter the Six-Month report date for any cases that are not updated.

40. **Question:** Will workers have to send out the Combined Six-Month (CSR) form DHS-5576?

    Answer: No. Workers will not need to worry about sending this out manually unless the client requests it. For the six-month review for September 2025, a CSR will be automated and sent out in July 2025.

41. **Question:** Are counties responsible for taking action on RCA cases?

    Answer: This depends on whether your county is one of the 12 counties that have the RCA administered by the Public-Private-Partnership (PPP) agencies.

    If your county is one of the 12 counties, the RCA cases will be approved by the PPP agency's RCA staff.

    If your county is not one of the 12 counties, your county must act by approving the RCA cases for March 2025 following the Guide to Six-Month Budgeting.

    See CM00.30.01 – Processing RCA Applications for the 12 counties listing.

42. **Question:** Do all RCA cases need new approval for the benefit month of March 2025?

    Answer: No. Workers do not need to complete an approval for an RCA case in which no change has been reported. However, if the RCA case is due for an HRF or six-month review, or if there are changes reported, the worker will need to review the RCA case for March 2025 benefits and approve the case for six-month budgeting.

43. **Question:** Will the worker need to apply the workaround for Six-Month Budgeting every month?

    Answer: No, unless an RCA case needs new approval due to changes reported and resulting in a benefit increase. The new RCA workaround for the Six-Month Budgeting must be followed. See the Guide to Six-Month Budgeting posted out on SIR.

44. **Question:** Can you clarify what you mean by this statement, "The RCA cases will be budgeted prospectively for six months or up to the twelfth month of RCA eligibility, whichever comes first."

    Answer: There are many reasons why RCA applicants do not necessarily have a full 12 months of RCA eligibility when they apply. The six-month budgeting policy does not reset or change the 12-month eligibility period for RCA. Workers must review these applications and only allow RCA to be active up to the 12th month, provided they meet all RCA eligibility criteria.

    Here are some case examples of when an applicant could have less than 12 months of RCA's 12-month eligibility period.

    When the applicant is a secondary arrival to Minnesota from another state, and they have already exhausted 6 months of RCA eligibility from their entry date in that previous state. The worker can only review for the remaining 6 months up to the 12th month.

    When an adult child is not initially on RCA upon arrival and later is no longer eligible for MFIP because they turned 19 years old. They may be eligible for the remaining RCA months up to the 12 months from their entry date.

    When an individual does not apply for RCA immediately after arriving in the U.S. Workers will see the number of RCA months remaining out of the 12 months. They will be eligible for RCA for the remaining months up to the 12th month.

45. **Question:** Can workers suspend RCA cases?

    Answer: No. Workers must not suspend RCA cases because the policy is no longer in effect. For the March 2025 benefit month, workers must review all RCA cases that are suspended for continued RCA eligibility based on the best information known to the agency and take action. If the case is not eligible, it must be closed.

46. **Question:** When a participant does not cooperate with the RCA program requirements, can we still sanction the RCA case?

    Answer: Yes. The six-month budgeting policy does not change the sanction policy for RCA. See CM30.15 – RCA Sanction Provisions.

47. **Question:** Can participants request Significant Change with this six-month budgeting policy?

    Answer: No. Significant Change policy is no longer in effect with the six-month budgeting policy.

48. **Question:** Can worker close RCA if it is verified that a participant is a full-time student during the six-month budget?

    Answer: Yes. The worker can closed RCA for the next available month, allowing 10-day notice.

49. **Question:** Can worker close the RCA case, if participant is not cooperating with the monthly check-in requirement?

Answer: Yes. Before closing the RCA case, send out a 2919 and allow 10 days to participant requesting for contact and check-in. If the participant does not follow through with the request, closed the RCA case for the next available month allowing 10-day notice.

50. **Question**: What should a worker do in the situation that an HRF is sent out and a [redacted] panel is flagged for a case, and it is not yet a six-month review nor annual recertification? And does it matter if the HRF is returned or not?

Answer: In the event that the case was somehow sent out a HRF and the [redacted] panel was flagged, worker does not need to take any action. This does not matter if the HRF is returned or not, there are no more HRF after March 2025 when the Six-Month Budgeting policy went into effect. If an HRF is returned, worker must review for any changes and take appropriate action as required.

Do not manually create a [redacted] panel for any benefit month on/after 4/2025 for any program that is not subject to monthly reporting. If a HRF tracking record is inadvertently created it can be ignored. A list of impacted cases is displayed on [redacted] and on [redacted] on each impacted case.

The monthly HRF Mailing batch job runs 6 business days prior to the end of the month. If a case is approved as a monthly reporter AFTER the HRF mailing batch job, [redacted]