

# Operations Memorandum

## OPS110701

**SUBJECT:** Requirements to Align all Budgets in a Case Record with a Common Renewal Date

**TO:** Executive Directors

**FROM:** Lourdes Padilla , Acting Director, Bureau of Operations

### **Purpose**

To ensure compliance with current Cash Assistance (CA), Supplemental Nutrition Assistance Program (SNAP) and Medical Assistance (MA) policy.

### **Background/Discussion**

Operations Memorandum 050710 required County Assistance Office (CAO) staff to align all budgets in a case record with a common renewal date. This includes budgets with a household composition that is not identical.

Case records with multiple budgets that have not been aligned with a common renewal date are not in compliance with CA, MA and SNAP procedures. CAOs must manually align budgets at the earliest renewal or case contact in order to be compliant with current procedures.

All CAOs must adhere to policy and procedural requirements and responsibilities when completing a renewal, Semi-annual Reporting (SAR) or case change. Refer to SNAPH [570](#), [571](#) and [576](#); CAH [170](#), [171](#) and [176](#); and MAH [370](#) and [376](#).

1. All budgets in a case record must be aligned with a common renewal due date. Adjust the CA and MA renewal periods to align with the SNAP renewal due date (see SNAPH [576.1](#)). If the case does not receive SNAP benefits, then use the CA renewal due date (see CAH [171.23](#)). If MA budgets are the only budgets open in the case, align all MA budgets to the same renewal date.

**EXCEPTION:** This requirement does not apply to the following budgets:

- MA-EMC budgets (PC/PU 71)
- MA-Extension for support budgets (PC/PU 23)
- MA-MAWD (PW/PI)
- SNAP-Extended SNAP budgets (EFS) (FS-43)
- SNAP-PA CAP budgets (FS-70)
- Cash-Transitional Cash Assistance (TCA) budgets (C/U 71 and C/U 72)

**Note:** Failure to comply with the requirement to align all budgets in the case record with a common renewal date will result in the CAOs processing additional renewals.

2. At the conclusion of a woman's MA post partum eligibility, a caseworker must review for ongoing MA and SelectPlan and determine if a review or complete renewal is required to be completed (see MAH [311.3](#) and [318.3](#)).

3. A case comment must be entered at every renewal, SAR, reported case change and anytime there is verbal or written contact with the client.

a) For renewal, the comment must include how the renewal was conducted (face-to-face, telephone, mail).

b) For renewal and SAR, a comment must be included that IEVS exchanges were reviewed for all individuals who impact the case.

### **Next Steps**

1. Share and review this information with all staff as appropriate.

2. Contact your area manager with any questions.

3. Obsolete Operations Memorandum 11-04-01.

4. This Operations Memorandum will become obsolete when this information is incorporated into the handbooks.