

TR: 16540
SF No.: ESA 16540-135
TITLE: Narrative Template for Special Allowances (SPAL)
Submitted: 02/15/2013
Agency: CAOs
Program:
CITATIONS:

Question:

CAH 135.64 explains the information needed for a SPAL narrative, but to provide consistent data entry that reflects the determination of eligibility for a SPAL, could CAOs be provided with a SPAL narrative template?

RESPONSE: DEPT

Yes. CAOs are encouraged to use a SPAL narrative template and may format the template in paragraph format or a numbered list as long as all necessary aspects are included. Although a narrative template for SPALS is not mandatory, following a specific format could be helpful for:

- supervisory, corrective action and headquarters reviews,
- substantiating decisions when a client appeals, and
- processing an overpayment based on a client's participation.

NOTE: Although a narrative template helps to ensure that all essential factors are considered, CAOs need to be cognizant that the statements indicated in the narrative template are actually completed (i.e. scanning verification, advising the client to submit a receipt within 14 days, and sending a PA 162 notice).

EXAMPLE - Blank Template for an Approved SPAL

1. Name of client and line #
2. Date SPAL requested
3. Allowance Requested w/(Reason Code)
4. To support participation what Program and Activity w(AC) – must be indicated on AMR or EDP
5. Timeframe of the Allowance (From/To)
6. Individual's WPR requirement (hours/week)
7. Date of Authorization
8. Approval amount and explanation of calculation (i.e. participation days, mapquest, schedule, etc)
\$
9. Forms completed and verification scanned (i.e. SPAL Verification Form, Estimates, etc)
10. Remainder of Annual or Lifetime Limit (obtained from SPAL tracking screens)\$
11. PA162 notice of eligibility or ineligibility sent.
12. Explained that a receipt is due to the CAO by _____ (14 days - exception is mileage).

EXAMPLE- Narrative completed using template:

1. Angelica Tree – Line 01
2. Requested SPAL on 1/2/2013
3. Bus Pass (268)
4. Participating in KEYS Community College (AC 14)
5. SPAL supports participation from: 1/7/13 to 1/31/13
6. WPR requirement (30 hours/week)
7. Authorized SPAL on 1/4/2013
8. \$83 bus pass for January authorized. Bus website validates cost of a Monthly pass. Monthly pass determined to be least costly w/consideration of class schedule and dropping children at daycare.
9. AMR and Class schedule scanned into C/R
10. \$ 1085 remains available for Transportation/Annual Limit in FY 12/13 after this SPAL issuance

11. Manual PA162 notice of eligibility sent and scanned into C/R
12. Told Ms. Tree that a receipt to verify the purchase of a monthly bus pass is due to the CAO by 1/18/2013