



HUMAN SERVICES  
DEPARTMENT

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## General Information Memorandum

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ISD-GI 15-08

TO: ISD Employees

FROM:  Marilyn Martinez, Acting Director, Income Support Division

RE: Expedite Processing

DATE: February 16, 2015

The purpose of this GI is to review the key points regarding the screening and processing for Expedite SNAP. All SNAP applications must be registered and screened for Expedite within 24 hours of when the application is filed. All SNAP applications eligible for Expedite benefits are to be processed in accordance with regulation at 8.139.110.16 NMAC.

**Verification Requirements 8.139.110.16A(2) NMAC:** All households entitled to expedited service are only required to verify their Identity. Verification of Identity must be completed through readily available sources such as: verification currently on file with ISD; SOLQ; or through a collateral contact. All other eligibility factors are to be postponed. Reasonable efforts must be made to verify residence, income, receipt of benefits in another state or commodities from the Food Distribution Program on Indian Reservations (FDPIR) and all other eligibility factors. Expedite benefits will not be delayed because of an inability to verify these factors or any questionable information, except for Identity.

**Documentation:** Case notes are to reflect the Expedite Screening determination as Expedite or Non-Expedite.

**Ongoing Training:** All eligibility staff are required to review the attached trainings by March 31, 2015:

1. Process for Expediting SNAP Cases (available on Blackboard); and
2. ASPEN Instructor Led Training: FAA Course, Module 5: Application Registration.

County Directors are required to submit the documentation regarding the review of the ASPEN Instructor Led Training. This can be done with a sign-in sheet for the training. The documentation regarding completion of the Blackboard training "Process for Expediting SNAP Cases" will be obtained from Office of Human Resources.

Please contact Vida Tapia-Sanchez by phone at 505-827-1300 or via email at [Vida.Tapia-Sanchez@state.nm.us](mailto:Vida.Tapia-Sanchez@state.nm.us) should you have questions regarding this GI. Thank you.



# **Instructor-Led Training FAA Course**

## **Module 05: Application Registration**

**NOTES**

# Module 05: Application Registration

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# Module 05: Application Registration

**NOTES**

## Purpose

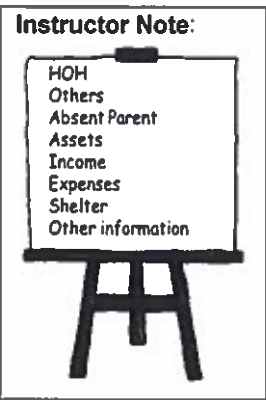
This module describes the procedures for registering an application in ASPEN using the Application Registration function.

## Objectives

After completing this module, you will be able to:

- Register applications in ASPEN.
- Record general household and customer demographic information.
- Perform File Clearance to determine if customers already have an individual record in ASPEN.
- Record the programs the customers have requested on their application.
- Screen customers to determine if they are entitled to expedited service.

### Instructor Note:



HOH  
Others  
Absent Parent  
Assets  
Income  
Expenses  
Shelter  
Other information

## Job Aids and Handouts

Job Aid 04: Statuses and Actions will be used during this module.

## Introduction

The Application Registration function in ASPEN allows staff to record application information in one system so it can be easily tracked and reported, as necessary.

Application Registration will support the following processes:

- Tracking all application information, including the application received date, in order to measure timeliness.
- File clearing of all individuals listed on an application against the Master Client Index (MCI) to reduce the potential for duplicate applications and duplicate aid.
- Establishing new Individual Identification Numbers for customers who do not already have a record in the MCI.

**NOTES**

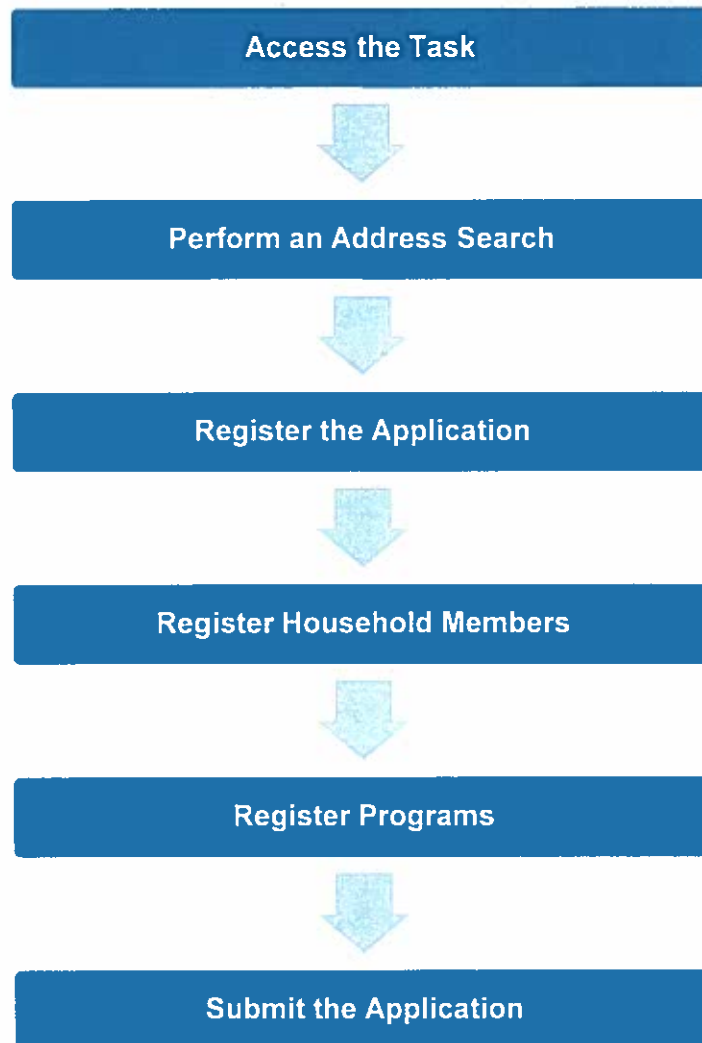
**Key Terms**

Term	Definition
<b>Application Number</b>	A unique number assigned to each new ASPEN application or application request. The Application Number starts with a "T", and will be followed by eight digits. You can search for existing applications using the Application Number.
<b>EDG</b>	Eligibility Determination Group. A grouping of individuals in a case based on the programs they have requested, their relationships to each other, and their non-financial, income, asset, and expense information. Individuals are grouped into EDGs for determining eligibility and calculating benefits for each program requested, based on the rules defined in the Decision Tables.
<b>File Clearance</b>	The File Clearance process compares the individual information recorded in either Application Registration or Data Collection (when adding or updating an individual) against the Master Client Index (MCI). ASPEN returns a score for each potential match based on how closely the data for an individual matches an MCI record with the customer's SSN, name and/or date of birth.
<b>Individual Number</b>	A unique number assigned to each ASPEN customer after the person passes File Clearance.
<b>Inquiry</b>	A function you will use to confirm whether applicants already have an active or inactive case in ASPEN and whether their physical address is already in use on another case before registering a new application. You can access Inquiry from Left Navigation.
<b>Master Client Index (MCI)</b>	The MCI is a database that stores identifying information for every customer known to ASPEN, ISD2, LIHEAP and SDX Master, including the customer's name, date of birth, gender, race, ethnicity, and Social Security Number (SSN). When you register an individual in Application Registration, ASPEN will try to match the individual's name, date of birth, and SSN with records in the MCI to see if they already have an Individual Number with ISD.
<b>Associated Case</b>	<p>Associated cases are cases in which an individual has been a member. For example, if a child lives part-time with a mother and part-time with a father and both parents have an active case, the child would be associated with both of the cases.</p> <p>In File Clearance, if you find that a new applicant previously had a case with ISD, you can associate the application to that case. This allows the household to retain their original case number and allows ISD to add the household's new information to the existing case history.</p>

Term	Definition
<b>Inquiry vs. File Clearance</b>	In ASPEN, Inquiry and File Clearance have different meanings. <ul style="list-style-type: none"> <li>• <b>Inquiry</b> is an ASPEN function to access read-only information. It is a manual process.</li> <li>• <b>File Clearance</b> is an automatic process that runs during Application Registration.</li> </ul>

**NOTES**

### Steps to complete the process



## NOTES

### Scenario

Maria has come into the office to apply for SNAP, Medicaid, and Cash for herself and her 5-year-old daughter, Anna. She and her daughter currently live with a roommate, Jane, who purchases and prepares separately. Maria is 4 months pregnant and has recently separated from her husband, Dan Cook. She works full-time at McDonald's as a cashier, earning \$1050/month and pays \$200/month for childcare. Her rent is \$490 per month and her utility bill is usually \$100 per month. Maria currently has \$168.48 in her checking account and owns her own car.

So far you scanned, linked, and indexed Maria's documents in ImageNow, which created a Task in the Application Registration queue of the EDM Inbox. Then you accessed the EDM Inbox to pick up her Task. Now this Task is yours and, as an FAA, you will need to complete the Application Registration process.

### Lesson 1: Inquiry

#### Individual Inquiry



Maria included three individuals on her application. Perform an Individual Inquiry for Anna and Jane, Maria's daughter and roommate, to see if they are already known to ASPEN.

**Left Navigation**, click **Inquiry > Individual > Individual**

Was Anna or Jane known to ASPEN?  
Based on your FAA experience, is it possible that Anna and Jane could already be known to ASPEN?

Now, you will perform an Address Inquiry for Maria's home to determine if anyone at that address is already receiving benefits. You will use the address on her application on your second monitor. Then you will be ready to begin Maria's Application Registration process.



Refer to the Case Data Sheet and electronic documents for scenario details. You should have the electronic copy of Maria's application visible in your secondary monitor.

1. From **Left Navigation**, click **Inquiry** to expand.
2. Click **Individual** to expand further.
3. Click **Address**.

The **Address – Search** page displays.

4. In **Address Search Criteria** section, type:

**5708 Bohemia Ct SW  
Albuquerque, NM 87105**

5. Click the **Search** button.



If the address is known to ASPEN, it will be displayed under the **Address Search Results** section.

Make sure you perform all the additional inquiries on a new application including individual and SSN searches.

6. Click the **HSD Logo** to return to the **ASPEN Homepage**.

## NOTES

### Instructor Note:

There is another case with Maria's address. Explain that this could be from a customer who previously lived at this address and has not updated their information. It could also be that there are apartments or a duplex. Explore what the implications of finding a match on this page would mean in the real world.

## Lesson 2: Register Application

1. On the **Dashboard**, in **My Tasks**, click the **Continue** hyperlink for Maria's application.

**The Register Application - Application** page displays.



### About the Register Application page:

The tabs at the top of the page are the Logical Units of Work (LUW) for the Register Application process. You must complete each of the pages in the LUW or the data will not be saved.

The **Applying on Behalf** tab is skipped unless you indicate that there is a filing representative or case manager/consultant agency (in the Household Contact Information section).

**Instructor Note:** This is the first time the students are seeing these pages. Make sure to explain the page going left-to-right, top-to-bottom. Point out required fields. Emphasize the importance of the fields in the Application Information section.



### Date Received

The **Date Received** text boxes will always automatically default to today's date. If the application was received earlier, you will need to enter the correct date. This is the only page in ASPEN that will allow you to change the application received date. **Once the application has been submitted, you will not be able to edit this date.**

Applications received from YESNM after 4:30 p.m. are registered in ASPEN as being received the following day.



## NOTES

**Instructor Note:**

Discuss what a PEMOSAA is and in order to access the PEMOSAA driver flow pages you will need to indicate that it is a PEMOSAA application.

**Instructor Note:**

The ISDB 710 Voter Registration IS NOT generated by ASPEN during Application Registration. However, on the Household Information page in Data Collection, ASPEN will automatically generate an ISDB 710 if the "Register to vote?" question is answered 'YES' or if there is an address change reported.

**Instructor Note:**

This is the first time the students are seeing these pages. Make sure to explain the page going left-to-right, top-to-bottom. Make sure to point out required fields.

- In the **Application Information** section, click the **Application Received Type** drop-down list and select **In-Person/Lobby**.
- In the **Primary Application** section, in the **first Name** text box, type **Maria**.
- In the **Last Name** text box, type **Maria's last name** from your Case Data Sheet.
- In the **Household Contact Information** section, click the **Phone #** text boxes, type in **(505) 555-1212**.
- Click the **Does the applicant want to register to vote today** drop-down list and select **NO**.

### ISDB 710 – Voter Registration

#### Does the applicant want to register to vote today?



- In Application Registration, when the voter registration question is marked "YES", ASPEN will not generate an ISDB 710 to the customer.
- ASPEN will automatically generate an ISDB 710 during Data Collection after a worker has selected 'Yes' on the Household page in Data Collection.
- ASPEN will automatically generate an ISDB710 during Data Collection when customers report a change of address.

- Click the **Next** button.

The **Register Application - Address** page displays.

- In the **Address Information** section, verify the **Address Type** selected is **Physical Address**.

### Important Notes about the Address Page

#### Mailing Address v. Physical Address



- When the physical address is entered and no mailing address is entered, the physical address will be used as the mailing address for outgoing correspondence.
- When a physical address is entered and a different mailing address is also entered, the mailing address is used to mail correspondence.
- When the physical and mailing addresses are exactly the same, the worker will only have to enter the physical address. ASPEN will use that address as the mailing address (as long as a mailing address was not entered).

**NOTES**



**Homeless Applicants**

If you indicate that the primary applicant is homeless on the **Register Application – Application** page, ASPEN will require you to enter a mailing address.

9. Click the **Address Line 1** text box, type **5708 Bohemia Ct SW**.
10. Click the **City** text box and type **Albuquerque**.
11. Verify the **State** text box is prefilled with **New Mexico**.
12. Click the **Residency County** drop-down list and select **Bernalillo**.
13. Click the **ZIP Code** text box and type **87105**.
14. Click **Add**.



Notice the **Reservation Information Section**. If your customer lives on an Indian Reservation, it is important to enter the correct data here because some reservations have benefits provided to their residents and the customer may need to be directed to these benefits. Also, some customers may live on tribal lands but are ineligible to receive tribal benefits. Ensuring that the “Reservation Information” on the Household Address screen is accurately updated; and the “Other In State Benefits” screen is completed will result in correct benefit determination.

The **Register Application – Address** page refreshes and the address populates into the bottom of the page.

15. Verify the **Address** displays in the **Address Summary** section.
16. If the address is correct, click **Next**.



The address is run through postal software and if there is a more accurate address it will display at the top of the page, asking if you mean “this” address instead? Click **YES** or **NO** and then **Next** again.

**Messages in ASPEN**



ASPEN populates Green and Red messages at the top of pages you may be working on. When a worker receives a message at the top of the page, it does not necessarily mean that something has gone wrong. These are informational messages that help guide workers when it is necessary to add more details, double check their work, confirm that their work is correct, or warn workers of how ASPEN will handle the information that was submitted.

The **Register Application - Type** page displays.

## NOTES

17. In the **Is this an Application for Assistance** drop-down list, verify **YES** is selected. This is the default.
18. In the **Is this an Initial Asset Assessment** drop-down list, verify **NO** is selected. This is the default.
19. Click **Next**.

**Instructor Notes:**  
Is this an Initial Asset Assessment? IAA establishes possible approval for a waiver or institutional care.



If you indicate that this is an Initial Asset Assessment, ASPEN skips the pages used to specify programs requested.

The Register Individual - Individual page displays.



**Maria's application now has a "T" application number.**

It is important to record your application number each time you process an application. Having your "T" application number written down allows you to quickly access an incomplete application or an application that has already been submitted.

The application status is now "Application Pending" and will remain in this status until you submit the application request.  
Write Your Application Number: \_\_\_\_\_

**Instructor Note:**  
Emphasize the importance of being thorough when registering individuals (Refer to 3<sup>rd</sup> paragraph of the "File Clearance" Student Note)  
**Instructor Note:**  
Enter the HOH first. The first individual will default as the HOH, instead of having to select the HOH from the drop-down.

## Lesson 3: Register Individuals

### File Clearance



All individuals living in a household must be included on the application for assistance. As a result, all household members must go through the File Clearance process regardless of whether they are requesting aid or not.

Once information is entered on an individual, ASPEN automatically runs the File Clearance process, using the Master Client Index (MCI) to see if that individual is already known to HSD. You will then evaluate potential matches to determine whether a new Individual Number needs to be created or whether an existing Individual Number will be used.

After individuals have been filed cleared in ASPEN, their demographic information cannot be updated in Application Registration. This includes name, gender, date of birth, ethnicity, race and SSN. If a change does need to be made, it must be done in Data Collection.

## NOTES

1. In the **Individual Name** section, verify that **Maria's name** is in the text boxes.
2. In the **Demographic Information** section, click the **Gender** drop-down list and select **Female**.
3. Click the **Date of Birth** text boxes, type **05/15/1989**, or use the **Calendar icon** to select the date.
4. Click the **SSN** text box and type **Maria's SSN** from your Case Data Sheet.

**Instructor Note:**  
Demonstrate the use of the calendar icon to select dates.

### Reported SSN Text Boxes



If a new applicant's SSN exactly matches the SSN of an individual in the MCI, ASPEN will return a 100% score during the file clearance process. ASPEN will not allow you to establish a new Individual using an existing SSN.

If the SSN match is questionable (for example, the SSNs are used by completely different individuals), you should move the applicant's SSN to Reported SSN (by clicking the previous button and then the edit icon). This allows you to proceed with the application registration process while the SSN issue is being resolved.

5. Click the **Race** drop-down list and select **White**.
6. Click the **Ethnicity** drop-down list and select **Hispanic**.
7. In the **Other Information** section, click the **Is the Individual currently pregnant** drop-down list and select **YES**.
8. Click the **Due Date** text boxes and select a date **5 months from today**.
9. Click **Next**.

**Instructor Note:**  
Demonstrate how to edit individual info by clicking the previous button and then the edit icon (before getting to the file clearance page).

The **File Clearance - Results** page displays.

### Understanding File Clearance Results:



If no records match, a message stating, "No potential matches found for the individual" appears at the top of the page. If there are any matches, data will display in the Potential matches ... section of the page. We'll see how that works when we file clear Jane, the roommate.

1. In the **Do you wish to view associated cases** drop-down list, verify **NO** is selected (default).

## NOTES

2. In the **Do you wish to establish a new individual** drop-down list, verify **YES** is selected (default).
3. Click the **Next** button.

The **Register Individual - Summary** page displays.

**Instructor Note:**  
Demo the Read-Only screen after clicking the edit icon from the Register Individual – Summary page.



Notice Maria now has an individual number. **She has been successfully file-cleared.** Clicking the Edit icon returns you to the Register Individual – Individual page, but in read-only mode only. Any changes will need to be done in Data Collection.

1. Click the **Add Individual** button.

The **Register Individual – Individual** page displays.

1. In the **Individual Name** section, click the **First** text box, type **Anna** and click the **Last** text box type the last name on your Case Data Sheet.
2. In the **Demographic Information** section, click the **Gender** drop-down list and select **Female**.
3. Click the **Date of Birth** text boxes, type **07/29/2009**, or use the calendar to select the date.
4. Click the **SSN** text box and type **Anna's SSN** from your Case Data Sheet.
5. Click the **Race** drop-down list and select **White**.
6. Click the **Ethnicity** drop-down list and select **Hispanic**.
7. Click the **Next** button.

The **File Clearance - Results** page displays.

1. In the **Do you wish to view associated cases** drop-down list, verify **NO** is selected (default).
2. In the **Do you wish to establish a new individual** drop-down list, verify **YES** is selected (default).
3. Click the **Next** button.

**Instructor Note:**  
Show where to select the HOH radio button.



### Head of Household

Since Maria was entered first, ASPEN assumed that she is the Head of the Household (HOH). If that is not correct, you can change that by clicking the HOH radio button next to another individual registered on the application.

The **Register Individual - Summary** page displays.

1. Click the **Add Individual** button.

## NOTES

### The Register Individual – Individual page displays.

1. In the **Individual Name** section, click the **First** text box, type **Jane** and click the **Last** text box and type **Gold**.
2. In the **Demographic Information** section, click the **Gender** drop-down list and select **Female**.

#### **UH OH! Maria does not know her roommate's birthdate or SSN!**

During the interview, Maria gives her roommate a quick call to get her information.



**Remember:** ASPEN requires all members of a household be listed on a case, regardless of whether they are requesting benefits or not. Therefore, it is important to collect as much individual information as possible to prevent the duplication of individuals who are already registered in ASPEN.

- If the **SSN** is unknown, then the FAA will leave it blank.
- If the **DOB** is unknown, then the FAA needs to make the most appropriate selection for this required field according to their office process.

During Data Collection, **"Not verified"** will need to be selected as the verification value.

3. Click the **Date of Birth** text boxes, type **08/22/1952**, or use the calendar to select the date.
4. Click the **SSN** text box and type **012-10-1264** for **Jane Gold**.
5. Click the **Race** drop-down list and select **White**.
6. Click the **Ethnicity** drop-down list and select **Non-Hispanic**.
7. Click the **Next** button.

**Instructor Note:**  
STOP: Have students wait on the Individual page before clicking next.

### The File Clearance - Results page displays.

1. Carefully look through the list of possible matches and select the **radio button** next to Jane Gold with an **exact SSN** match.
2. Click the **Do you wish to view associated cases** drop-down list, select **NO**.
3. Click the **Do you wish to establish as a new individual** drop-down list, select **NO**.
4. Click the **Next** button. This completes the LUWs for registering the household members.

**Instructor Note:**  
Emphasize the importance of verifying whether this is the correct match before selecting any radio button.

Have the students read the student notes on the following pages and review as a group.

## NOTES

### Identifying Potential Matches

Potential matches display a score, based on matching criteria. Exact social security number matches get a 100% score, while similar matches get a lower score. A 100% Score may include the same SSN numbers but not in the correct order.

To see more details on a match, click the Individual Number hyperlink. This will open an Individual – Summary page in a new window. View the individual's demographics to determine if this is the same individual you are File Clearing. At the bottom of the page is a Current EDG Affiliations section. Click the EDG # hyperlink to see more information on the EDG – Search/Summary page, including other people on the EDG. You can also view the case address in the Case Search/Summary page to verify the address. This may help in your research.



### If you determine your person is not known to ISD:

1. Return to the **File Clearance – Results** page.
2. Click the **Do you wish to view associated cases** drop-down list select **NO**.
3. Click the **Do you wish to establish a new individual** drop-down list select **YES**.
4. Click **Next**. The **Register Individual – Summary** page displays.

### Associated cases

Associated cases are cases of which an individual has been a member over time. For example, if a child lives part-time with a mother and part-time with a father and both parents have an active case, the child would be associated with both of the cases.

In File Clearance, if you find that a new applicant previously had a case with ISD, you can associate the application to that case. This allows the household to retain their original case number and allows ISD to add the household's new information to the existing case history.



You can associate a new application to an existing case regardless of the current status. The case status can be:

- Pending,
- Approved,
- Denied,
- Closed.

**NOTES**

Example of when you **would** associate a case:

A customer had been receiving SNAP for five years. When she gained employment, her income increased over allowable limits, and her case was closed. She recently lost her job and applied for SNAP again. When you register her application, you will be able to locate her original Case Number in File Clearance. Associate her new application to the original case so she will keep both her original Case Number and Individual Number.



Example of when you **would not** associate a case:

A husband and his wife have been receiving SNAP for five years. The husband moves out of the home. When he leaves the home, he is removed from the case. The husband later applies for his own food assistance. When you register his application, you will locate his original Case Number in File Clearance. Although you will want to use his original Individual Number, you will not associate his new application to the original case. The wife will retain the original Case Number. The husband should be assigned a new Case Number.

**Multiple Case Numbers**

Customers could potentially have more than one case. For example, BCCP is a category of eligibility that should stand-alone and therefore, if the customer requests additional benefits, another case number must be created. Cases such as SSI or IC are examples of cases that should also stand alone and not be associated. (The MSP program may be included in these stand-alone cases by entering Medicare Part A eligibility on the Medicare Claim page and then running EDBC) - Unless that client is re-requesting the same program.



If the client has one of the programs listed below and applies for other benefits, a **New Case MUST be created**, unless that client is re-requesting the same program. Regular SNAP, Medicaid, LIHEAP or a cash program can be associated to the existing case number

Stand-alone cases:

- SSI
- BCCP
- IC
- NMCAP
- 500 numbered case (please see special note below)



## NOTES

### 500 Case Numbers



During conversion, ASPEN creates a “dummy” case # that starts with a 500XXXXXXXX for cases that have been closed or denied for more than 8 months in ISD2. This transfers the client’s benefit history, time clocks and claims.

**Make sure you treat the individual as client known to ASPEN, associating them with the Individual ID. Do NOT associate with the case number that starts with the 500 number.**

The Register Program - Program page displays.

## Lesson 4: Register Programs

1. In the **Application Form Type** drop-down list, verify **ISD 100 Application for Assistance** is selected.
2. In the **Programs** section, check the box for **Cash, SNAP, and Medicaid**.
3. Under the **Requesting Aid** column, check the box for **Maria and Anna**.

**Instructor Note:** It is very important to select the correct Application type because it can affect benefit amounts

### About Registering Programs:

If the requested programs do not apply to all of the requesting individuals, you will need to complete this page for each program by clicking the **Save + Add Program** button.



### Example

- A mother is requesting SNAP for herself and her child, but she only wants to request MA for her child.
  1. Click the checkbox for SNAP and then select the checkboxes for each individual in the ‘Requesting Aid’ section. Then you will click the **Save + Add Program** button.
  2. The page will refresh and the checkbox for SNAP will become unavailable. You will select the Medicaid checkbox from the ‘Programs’ section and then select the checkbox for the individual who is requesting MA in the ‘Requesting Aid’ section.



### Important Note:

The checkboxes located in the **Separate SNAP Assistance** column currently are not being utilized in ASPEN because they do not adhere to ISD Policy in the state of New Mexico. Per policy, individuals who wish to request SNAP separately must complete a new application.

- Click the **Next** button.

## NOTES

The **Register Program – Expedited Screening SNAP** page displays.

### Pro-rated Calculations and Citizenship Status for Determining Expedited Benefits:



In cases where income must be pro-rated, or citizenship status must be taken into account (e.g., undocumented aliens, students and/or customers reporting self-employment income), workers must take an application from Application Registration through Data Collection to determine expedited benefits. ASPEN will automatically calculate pro-rated benefits upon running EDBC.

Expedited SNAP is determined in two places:

- App Reg/Data Collection** – This is done while registering the program using Expedited Screening SNAP pages. This is only used to process the application in a timely manner.
- EDBC** – This is the final determination for expedited SNAP and includes all SNAP rules and pro-rated logic.

#### Instructor Note:

If there are unpaid medical bills for past months, make sure you select the months with unpaid amounts. This would request retroactive coverage for Medicaid program.

- In the **Household Income and Resource** section, click the **Monthly gross income of household** text box and type **1050.00**.
- Click the **Liquid asset of household** text box and type **168.48**.
- In the **Applicant pays for** area, click the **Heating or Cooling (HCSUA)** check box.
- Click the **Rent/Mortgage** text box and type **490.00**.
- In the **Migrant/Seasonal Farmworker** section, click the **Is there a migrant or seasonal farm worker in the household** drop-down list and select **NO**. (This is a required field.)
- Click the **Next** button.

The **Register Application - Summary** page displays.

You may have noticed there are no more 'Next' buttons. Once you click 'Submit' in Application Registration, you will not be able to make any changes to an application. It is important to thoroughly review the **Register Application - Summary** page.



#### Continue with Interview?

- If you select '**YES**', the task will remain on your dashboard and you will be required to complete the Intake process in Data Collection.
- If you select '**NO**', the task will be removed from your dashboard and the application will be placed into the Intake queue for another worker to complete.

#### Instructor Note:

Review why the FAA only needs to select HCSUA and not both HCSUA and TSUA.

Again, even though the other fields on this page are not covered in the text to the right, this is the first time the students are seeing this page, so you should address them.

**NOTES**

1. Verify the **Continue with Interview** drop-down list is selected **YES** (default). If you select **NO**, other questions become mandatory.
2. Click **Submit**.

The **Initiate Action** page displays.

**Instructor Note:**  
Answer the questions as a group.

**Answers:**  
1 - T  
2 - File Clearance  
3 - True  
4 - False

## Application Registration Questions

1. ASPEN assigns an application number to every application during the registration process. These numbers begin with what letter?  
\_\_\_\_\_
2. ASPEN assigns individual numbers to new individuals after what process?  
\_\_\_\_\_
3. True or False: If SNAP is requested, ASPEN will automatically prompt you to screen the application for expedited processing.  
\_\_\_\_\_
4. True or False: ASPEN does not require everyone living in the household to be listed on the case.  
\_\_\_\_\_

Now that you have finished registering an application, you are ready to begin the Intake through Data Collection in the next module.



This is the end of the Module 05.

# Process for Expediting SNAP Cases



## **Purpose:**

To provide a checklist of factors for application screening and evaluation of eligibility programs, identifying barriers to the application process and to determine eligibility for expedited SNAP benefits

## **Objectives:**

- Review application for consistencies
- Recognize and address participation barriers
- Identify potential households eligible for Expedite SNAP services.

## **Key Terms:**

**SNAP-** Supplemental Nutrition Assistance Program

**EBT-** Electronic Benefit Transfer

**Barriers-** prevent a client from being able to come into the office to complete their interview

**Expedite-** to execute promptly, accelerate the process or progress.

**SUA-** Standard Utility Allowance

**Migrant Worker-**a person who moves from place to place to get work, especially a farm laborer who harvests crops seasonally

**Destitute-** workers may have little or no income

## **Procedures:**

- Screen for potential eligibility in the various programs
- Review current case status
- Identify barriers to the application process, and to
- Complete expedited screening.

## **Participation Barriers:**

### **What to Ask**

- Do you have special needs that we should know about for your interview?
- Is there any reason that you might have some difficulty coming to our office for your interview?
- If you can't come to our office for your interview...

## **Expedited SNAP Screening:**

Household reporting little or no income or resources may be entitled to receive SNAP benefits within seven (7) days after they file an application.

### **Expedite Screening:**

The following households may qualify for expedited SNAP benefits or "emergency SNAP"

- Households with less than \$150 in gross monthly income, and
- With liquid resources (i.e., cash on hand, checking or savings accounts, savings certificates, lump sum payments, and the like) not exceeding \$100;
- Households whose combined gross monthly income and liquid resources are less than the household's monthly rent/mortgage, and utilities. [When looking at income and resources and utilities, Workers will use the appropriate utility allowance HCSUA (Heating/Cooling Standard Utility Allowance), LUA (Limited Utility Allowance), TS (Telephone Standard)].
  - Determination: Expense and standard deduction amounts are determined by federal guidelines and may be adjusted each year. Households eligible based on income and resource guidelines, and other relevant eligibility factors, are allowed certain deductions to determine countable income.
  - Yearly Adjustment: The expense and standard deductions may change each year. If federal guidelines mandate a change, it is effective each October 1st.

## **Mandatory Utility Allowance:**

- A deduction for actual utility expenses is no longer allowed.
- There are 3 levels of the utility allowance.
- The SUA is no longer prorated.
- SUA amounts will be recalculated each July and changed each October if appropriate. (Policy: Issuance Table Manual section – 8.139.500.8 E NMAC)

### **Heating/Cooling SUA:**

A SNAP household with a heating or cooling expense separate from other shelter expenses will be allowed a flat Heating/Cooling Standard Utility Allowance (HCSUA).

### **Limited Utility Allowance:**

A SNAP household that does not have a separate heating or cooling expense, but has two or more of these expenses, will receive a Limited Utility Allowance (LUA):

- Electricity or fuel, other than for heating or cooling
- Water Sewerage
- Well and septic tank installation or maintenance

- Garbage or trash collection
- One telephone

### **Telephone Standard:**

A SNAP household with no separate utility costs other than an expense for a telephone will be allowed the Telephone Standard (TS).

### **Homeless Shelter Standard:**

- A HH defined as homeless shall be allowed the Homeless Shelter Standard (HSS) if the HH does not receive free shelter throughout the month
- HH is required to indicate only one instance for which they had to pay for shelter in the month to receive the HSS
- The HH may claim actual expenses if greater than the HSS
- The HSS is deducted from HH's countable net income
- The caseworker will accept client's statement regarding the expense.

### **ISD IPP 11-10 (Postponement of Expedite Interview)**

On December 1, 2011, this IPP established the procedure for postponing the interview for applicants who meet the expedite criteria.

Click on the link located on the right under the Resources title to open the IPP document. Note: there is some information on this IPP that no longer applies.

### **Migrant and Seasonal Farm Workers:**

Migrant or seasonal farm worker households with \$100 or less in liquid resources and determined to be destitute as defined by the special income calculations in the manual section.

#### **Destitute Households:**

Migrant and Seasonal farm workers may have little or no income at the time of application and may be in need of immediate food assistance, even though a household may have received income at some time during the month of application.

#### **Determining whether a Migrant and Seasonal Farm worker household is Destitute:**

1. Terminated Income
2. New Income Source
3. Income from Terminated and New Source
4. Travel Advances

### **Terminated Income:**

**Expedited Service:** Migrant or seasonal farm workers whose only income for the month of application was received before the date of application, and was from a terminated source, will be considered destitute and entitled to expedite service.

**Monthly or More Frequent Income:** If income is received on a monthly or more frequent basis...

- It will be considered as coming from a terminated source if it will not be received again from the same source during the balance of the month of application or
- During the following month

**Less Often than Monthly Income:** If income is normally received less often than monthly

- Income will be considered as coming from a terminated source if it will not be received in the month in which the next payment would normally be received.



# ASPEN:

Below are screen shots of the ASPEN program that is used to enter the client's information.

## Expedited Screening SNAP Page:

On this page is where you enter the information under the Household Income and Resources and Expenses of Household for the Application Month sections. ASPEN will calculate the amounts automatically. See next screen shot for next page.

Program Summary | Program | SCL Member Affiliation | **Expedited Screening SNAP**

Register Program - Expedited Screening SNAP ? \* [ ] [ ] [ ]

Application: I40016310 Status: Application pending Date Received: 01/09/2015

[ RESET ] [ CANCEL ] [ PREVIOUS ] [ NEXT ]

### Household Income and Resources

\* Monthly gross income of household (wages, cash, contributions, odd jobs, child support, etc.) \$ 725.00

\* Liquid asset of household (cash on hand, checking, savings or savings certificates) \$ 0.00

Does the household have less than \$150 in gross monthly income and liquid asset not exceeding \$100? NO

### Expenses of Household for the Application Month

Applicant pays for

Heat or Cooling (HCSUA)  Limited (LSUA)  Telephone (TSUA)

Rent/Mortgage \$ 425.00

Is household's combined monthly income and liquid assets less than the household's monthly rent or mortgage and utilities? NO

### Migrant/Seasonal Farmworker

Is there a migrant or seasonal farm worker in the household? NO

Did household lose only source of income? NO

Date income stopped? 11/11/2012

Did household receive income from the same grower within 30 days prior to the application date? NO

Amount Received \$            Date Received 11/11/2012

Does household expect to receive income later this month? NO

Amount expected \$            Date income expected 11/11/2012

# Application Summary Page:

The Register Application - Summary page displays with the results on the Application Summary section. If a client is applicable for Expedited SNAP, you must complete the application and enter the information in the data collection to finish with running eligibility. All applications that are screened and qualify for Expedited SNAP must be completed at the time of registration.

**Application Summary**  
Register Application - Summary ? ★ 📄 🔍 🚫

Application: TJG018310      Status: Application pending      Date Received: 01/09/2015

[Previous](#) [Submit](#)

**Application Summary**

Head of Household	Winter, Shern 27F	Expedited SNAP	Yes
		Crisis LIHEAP	N/A
		Life Threatening LIHEAP	N/A

Name	SSN	Individual #	Date of Birth	Program	Alias Name(s)	SSCH/ RRN(s)
Winter, Shern 27F	632-58-9674	<u>0110640107</u>	03/26/1987	SNAP		

• Continue with interview?      YES ▾

• Process the expedite with postponed interview?      YES ▾

• Schedule an appointment?      YES ▾

Applicant would like to meet with a Supervisor?      YES ▾

[Previous](#) [Submit](#)

# Program Request - Summary

The Program Request - Summary page will validate the SNAP expedite with a yes or no.

Summary Details SCI Member Affiliation Individuals Expedited Screening SNAP Visited 21

**Program Request - Summary**

Case Name: Winter Sherri Case #: 140018310 Case Action: Case change Case Status: Approved

Program	Application Date	Individuals	Date Requested (Individual)	Program Status	Expedited	Crisis LINEAP	Life Threatening LINEAP
SNAP	01/09/2015	Winter Shern 27F	01/09/2015	Approved	YES	N/A	N/A

PREVIOUS NEXT

PREVIOUS NEXT

# SNAP - EDG Summary:

You can also check to see if the client's SNAP case should be expedited by clicking on the ongoing month to open the Summary page. On this page you can see the Yes or No for Expedited/Crisis (LIHEAP).

Summary
Notice Reasons
Assets
Gross Income
Net Income

SNAP - EDG Summary [Eligibility Summary](#)

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Case Name: Winter, Sherril

EDG Name:

Benefit Period: 01/09/2015-01/31/2015

Certification Period: 01/09/2015-12/31/2015

EDG Information

Eligibility Begin Date: 01/09/2015

Non Financial: Pass

Assets: Not Applicable

Financial: Pass

Verification: Pass

Reporting Type: Simplified Reporter

Penalty Count:

Existing Penalty Count:

Case #: 140018316

EDG #: 4079704

Eligibility Status: Approved

Review Due Date:

Aged/Disabled EDG: No

Migrant Household: No

Expedited/CRISIS (LIHEAP): YES

Maximum Copay Amount: 0.00

Funding Indicator: Federal

Penalty Begin Date(mm/yyyy):

Case Mode: Intake

COE: SNAP

Disposition Status:

Interim Review Date: 06/30/2015

Eligibility End Date:

Last authorized amount for this month:

Current Benefit Amount: 142.00

Supplement/Overpayment:

State Supplement Amount:

Categorically Eligible: Yes

Penalty End Date(mm/yyyy):

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	Name	Certified Group	Relationship	EDG Participation Status	Work Participation Status	Exemption/Participation Reason
	Winter, Sherril	Y	Self	Eligible Adult	Mandatory Participant	Work Participation Mandatory

Excluded

[Eligibility Summary](#)