



# New Mexico Human Services Department

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## INTERDEPARTMENTAL MEMORANDUM MAD-GI: 08-01 DATE: March 13, 2008

TO: ISD AND MAD STAFF  
FROM: CAROLYN INGRAM, DIRECTOR, MEDICAL ASSISTANCE DIVISION  
FREDRICK SANDOVAL, DIRECTOR, INCOME SUPPORT DIVISION  
THROUGH: REBECCA SCHWARZ, ADM/OPS II, CLIENT SERVICES BUREAU  
BY: LIZ MARTINEZ, CLIENT SERVICES BUREAU  
SUBJECT: ISD2 PROGRAMMING CHANGES FOR CATEGORY 062 (SCI)

Changes have been made to the ISD2 System for Category 062 State Coverage Initiative (SCI) effective February 25, 2008. The specific changes are to separately manage unearned and earned income screens for SCI cases as outlined below.

### Income Screens

Previously category 062 SCI EI1 and UEI1 screens were shared in the eligibility process for all active categories. Now the EI1 and UEI1 screens for 062 SCI cases will not be calculated in the eligibility process for other categories. In order for workers to view a 062 SCI case EI and UEI1 screens, they must manually call up the income screens. The EI1 screen for 062 SCI will be identified with \*\*\*For CAT 062\*\*\*. See sample screen below.

```
INQUIRY * * * C L I E N T   F I N A N C I A L   D A T A   * * * 062 EI1 02
MNTH: 0308 * * * E A R N E D   I N C O M E   - 1   * * *           EI2
                *** FOR 062 USE ONLY ***                JOB-NUMBER: 02
      C L I E N T   -   N A M E           S S N           C A S E - I D   C A T   C A S E - I D   C A T
0000000      00000      000000000      000000000      032      000000000      062
```

```
EMPLOYER: 0000000000000
ADDRESS: IN                               PHONE
      C I T Y : A L B U Q U E R Q U E   S T : N M   Z I P : 8 7 7 7 7       ( 5 0 5 )
-----
TYPE AMOUNT-1 HRS V AMOUNT-2 HRS V AMOUNT-3 HRS V AMOUNT-4 HRS V   TFS 10/03
EI      2743.40 175 Y                               1896.30 130 Y
-----
EMPLOYMENT-DATES BUSINESS
START      END      EXPENSES V      EITC      V      IDA      V
090198
GOOD-CAUSE-QUIT:      JTPA-EXEMPT                               UNTIMELY      DELETE-JOB:
VOL-QUIT-CD:      CNTR: 1      IND:                               IND:      ANOTHER-JOB:
VERIF-REMARKS: 000000 000 091807 COPY OF CHECK STUBS IN C/R.
                USED LAST FOUR
```

"ENTER" KEY = CONTINUE "PF3" = CANCEL  
"PF4" = SKIP/HOLD "PF5" = PAGE BACKWARD "PF6" = WORKSHEET END

If a head of household or spouse of head of household has multiple jobs, only **one** EI screen per individual will be permitted for 062 SCI cases. Category 062 SCI now only has one earned income screen per employed individual in the household.

- Workers should utilize the PF6 screens for each job to determine adjusted income needed for the EI1 screen. The SCI workers need to add the income from all jobs and note in the case record and appropriate EI1 screen(s) for the member and/or spouse.
- If a category 062 SCI member or a spouse has multiple self-employment jobs, and any of the job's business expenses exceed the earned income, do not include either the self-employment income or the business expenses in the total earned income or business expenses field on the one EI screens. Workers should utilize the verification remarks field on the EI screens and/or the case records, as applicable. See sample screen below.

```
UPDATE * * * C L I E N T F I N A N C I A L D A T A * * * 062 EI1 01
MNTH: 0208 * * * E A R N E D I N C O M E - 1 * * * EI2
*** FOR 062 USE ONLY *** JOB-NUMBER: 01
C L I E N T - N A M E S S N C A S E - I D C A T C A S E - I D C A T
TEST SCI 55555555 55555555 062
```

```
EMPLOYER: SAMS/WALGREENS/COSCO
ADDRESS: X PHONE
CITY: X ST: NM ZIP: 87504 ( 505 )
-----
TYPE AMOUNT-1 HRS V AMOUNT-2 HRS V AMOUNT-3 HRS V AMOUNT-4 HRS V TFS 10/03
EI 807.95 080 Y Y
-----
EMPLOYMENT-DATES BUSINESS
START END EXPENSES V EITC V IDA V
120107
GOOD-CAUSE-QUIT: JTPA-EXEMPT UNTIMELY DELETE-JOB:
VOL-QUIT-CD: CNTR: IND: IND: ANOTHER-JOB:
VERIF-REMARKS: TEST SCI 010208 SAMS $135. WALGREENS $135.45 COSCO $537.50
```

"ENTER" KEY = CONTINUE "PF3" = CANCEL  
 "PF4" = SKIP/HOLD "PF5" = PAGE BACKWARD "PF6" = WORKSHEET END

Currently, there are category SCI 062 cases where either the applicant or the spouse has multiple jobs. ISD2 has consolidated the jobs into the one EI screen as applicable **only for Category 062 cases**. The employer name is displayed as "SCI Employer Roll-Up". See sample screen below.

```
UPDATE * * * C L I E N T F I N A N C I A L D A T A * * * 062 EI1 02
MNTH: 0208 * * * E A R N E D I N C O M E - 1 * * * EI2
*** FOR 062 USE ONLY *** JOB-NUMBER: 04
C L I E N T - N A M E S S N C A S E - I D C A T C A S E - I D C A T
SPOUSE for SCI CASE XXXXXXXXXX XXXXXXXXXX 032 350808358 062
XXXXXXXXXX 062
```

```
EMPLOYER: SCI EMPLOYER ROLL-UP
ADDRESS: LOCAL PHONE
CITY: PORTALES ST: NM ZIP: 88130 ( 505 )
-----
TYPE AMOUNT-1 HRS V AMOUNT-2 HRS V AMOUNT-3 HRS V AMOUNT-4 HRS V TFS 10/03
SE 2136.50 344 Y
-----
EMPLOYMENT-DATES BUSINESS
START END EXPENSES V EITC V IDA V
010106 90.93
GOOD-CAUSE-QUIT: JTPA-EXEMPT UNTIMELY DELETE-JOB:
VOL-QUIT-CD: CNTR: 1 IND: IND: ANOTHER-JOB:
VERIF-REMARKS: SPOUSE FOR SCI 081407 LETTER IN C/R, HE IS ON SALARY, USED
2006 TAXES TO CALCULATE ESTIMATED MO INCOME INCL RENTAL
```

"ENTER" KEY = CONTINUE "PF3" = CANCEL  
 "PF4" = SKIP/HOLD "PF5" = PAGE BACKWARD "PF6" = WORKSHEET END

After an SCI 062 case is registered or recertified in the appropriate Geo/Admin, the income(s) entered in the applicable screens as noted above remain locked for the 12-month periodic review (PR) period.

- Once a SCI 062 case is finalized, ISD2 uses the countable income to determine the Case Status Type A, B, or C as displayed on the FACL screen.
- The Status Case Type as displayed on the FACL screen will also remain locked for the 12 month PR period.

The SCI workers or non-SCI workers are not able to make changes to the Category 062 SCI EI or UEI income screens during the PR period unless:

- it is determined that an administrative error occurred regarding the entry of earned or unearned income(s), changes to the EI or UEI income screens can only be made by an SCI supervisor; or
- the change is due to an administrative error, the Case Status Type can potentially change.

The SCI workers cannot make changes to the EI or UEI screens on other categories. The non-SCI workers cannot make changes to the EI or UEI screens on SCI 062 cases.

**New Geo/Admin Offices**

Two new Geo/Admin Offices have been added to ISD2: (1) 45/45 for the North SCI Office, and (2) 47/47 for the South SCI Office (Las Cruces).

- The Geo/Admin codes for SCI 062 cases will remain as they currently are in ISD2.
- SCI workers will utilize the new Geo/Admin codes during case registrations, re-certifications or case changes only.
- A category SCI 062 can be transferred to Geo 45 or 47 only.

Stand alone SCI 062 cases will be registered in either geo/admin, 45/45 or 47/47. After the case has been processed by the SCI 062 worker, when transferring the case, the worker will retain Geo 45 or 47, but will be assigned the administrative area for which the client resides in. For example, if an applicant resides in Santa Fe County, after the SCI worker takes action on a SCI 062 case in 45/45, the SCI worker will then transfer the case to the administrative office in which the client resides, 45/26.

For 062 SCI cases with multiple categories the SCI case worker will transfer the existing 062 SCI into their GEO office and keep the same ADMIN. See sample screen below.

```

UPDATE                * * *   C A S E   T R A N S F E R   * * *                XFER

                CURRENT-GEO: 32  ADM: 32                NEW-GEO: 47  ADM: 32

CASE-ID    CAT    NAME    ST SU/EW                CASE-ID    CAT    NAME    ST SU/EW
000000000  032 TEST    MED A 08 08                585638745  062 TEST    MED A 08 08
000000000  062 TEST    MED A 08 08
  
```

"ENTER" KEY = CONTINUE "PF3" = CANCEL

When an SCI worker transfers an existing multiple category case to 45 or 47, only the 062 SCI case(s) will transfer. All other categories will remain in their current geo/admin. Once the SCI 062 case has been transferred, the worker will have to go back in the case transfer function to assign the SCI 062 case(s) their worker ID. All other categories will retain their geo/admin and worker IDs.

If workers have any questions regarding this information, please contact the ISD2 Help Desk @ HSD-ISD2 Help Desk or (505) 827-7255 or 827-7266.