TO: DIRECTORS, LOCAL DEPARTMENTS OF SOCIAL SERVICES
   DEPUTY/ASSISTANT DIRECTORS FOR FAMILY INVESTMENT
   FAMILY INVESTMENT SUPERVISORS AND CASE MANAGERS

FROM: CHARLES E. HENRY, EXECUTIVE DIRECTOR
      JOSEPH E. DAVIS, EXECUTIVE DIRECTOR, DHMH, OOE

RE: NARRATION GUIDE

PROGRAM AFFECTED: ALL

ORIGINATING OFFICE: OFFICE OF POLICY, RESEARCH AND SYSTEMS

SUMMARY:

The CARES Narration Desk Guide is complete. Its purpose is to serve as a
resource guide for producing a quality standard narration statewide. The Narration
Guide Workgroup sincerely thanks all the contributors who assisted in completing
this project.

INQUIRIES:

Please direct questions about the Guide to Jean Radcliffe at 410-767-7977 or
jradclif@dhr.state.md.us. If you wish to schedule narration training, please contact
Bob Meagher at 410-767-7194 or rmeagher@dhr.state.md.us.

cc: DHR Executive Staff
    FIA Management Staff
    Constituent Services
    Help Desk
    CTF
TABLE OF CONTENTS

Introduction

I. Writing Tips

II. Narrating in CARES

III. Standard CARES Procedures

IV. Sample Narratives

V. Standard Abbreviations, Codes and Definitions
Introduction

Good documentation in CARES is imperative for good case management. It is critical because it maintains the history of the case. The narration details an accurate representation of the interaction with or on behalf of the customer and should provide in a clear, concise manner the facts of a case at any given time. It is an essential element in determining eligibility, overpayments, appeal hearings, fraud investigations and resolving CARES issues.

The purpose of this desk guide is to assist the case manager in producing a quality standard narration that can result in effective communication for all readers. The information in the guide was obtained from local departments and FIA units and compiled by FIA’s Policy and Training Bureau to produce a resource manual for statewide users.

We would like to extend a special “thank you” to the following local departments and FIA Bureaus for their assistance in completing this project:

- Allegany Co.
- Baltimore Co.
- Frederick Co.
- Harford Co.
- Prince Georges Co.
- Continuous Improvement
- DHMH
- Help Desk
- Quality Control
WRITING TIPS
1. Be clear, concise and to the point.

2. Use only commonly known abbreviations.

3. Name the source of any unearned income. Example: loan, contribution, vendor payments etc.

4. Include the date, period covered and findings/conclusion when noting a redetermination. “Redet Completed” is not adequate documentation.

5. Indicate which individuals are requesting assistance. When adding or subtracting household members, be clear who is in or out of the unit.

6. Note the reason, verification used and appropriate action when correcting an error.

7. State which individuals reside with the customer and their relationship in situations where the customer resides with others.

8. Document telephone verification by giving the name, telephone number, company, and title of the person contacted.

9. State which figures were used and how you verified the information to arrive at the monthly gross when calculating earned and unearned income.

10. Explain your reasoning/rationale when making a “prudent person” or judgmental decision.
THE SIX PRINCIPALS OF CLEAR WRITING

1. **Use clear familiar words**
   Small words are usually the clearest and easiest to understand.
   They are more precise. You will need some large words for explanation,
   but use sparingly.

2. **Keep most sentences short and simple**
   Long sentences are difficult to read.
   Use one major idea per sentence.
   Short sentences are easier to write.

3. **Use active voice verbs: avoid passives (whenever possible)**
   In the active voice the subject performs the action.
   Example: Ms. Jones brought in rent verification.
   Instead of: Verification of rent was brought in by Ms. Jones.

4. **Get people into your writing.**
   People are an important part of what you are writing about.
   Use the person’s name instead of referring to him or her as the customer.

5. **Use a conversational style.**
   Most people are far better talkers than they are writers.

6. **Gather all your information before you start to write.**
   Some writers start too soon before they have all the information.
   Have all the information for the clear thinking that clear writing
   requires.
RULES OF GOOD WRITING

- Write the way you speak
- Be specific and concrete in your choice of language
- Avoid jargon
- Get to the point as quickly as possible
- Translate antiquated language into conversational words and phrases
- Avoid averaging more than 17 words per sentence
- Put yourself in your reader’s place
- Inform readers of policies, procedures, and actions taken
- Confirm a decision, an agreement reached
COMMONLY MISSPELLED AND MISUSED WORDS AND PHRASES

✓ However In the meaning nevertheless, not to come first in a sentence or clause

✓ Kind of Not to be used as a substitute for rather

✓ Less Should not be mistaken for fewer (Use less for amount – Ms. Jones has less money than she needs for her rent; fewer for number – there are fewer people in her family than she originally reported.)

✓ Effect As noun means result
As a verb means to bring about or accomplish (should not be confused with affect, which means to influence)

✓ Due to Incorrectly used for through, because of or owing to

✓ State Not to be used as a substitute for remark
PUNCTUATION

Comma
- Use a comma between main clauses joined by and, or, but, yet.
- Use a comma to set off transitional words and short phrases that would require a pause in speaking.
- Use a comma to set off words used to introduce a sentence.
- Use a comma to set off a long phrase that precedes the principal phrase.
- Use a comma to set off short quotations and sayings
- Use a comma to set off the year from the day of the month in noting dates.
- Use a comma to set off the city and state in geographic names.
- Use a comma to set off direct addresses
- Use a comma to set off titles from names
- Use a comma between words or figures which may be misread

Semicolon
- Use a semicolon between clauses that are not joined by and, but, nor, for or yet.
- Use a semicolon between clauses joined by adverbs such as however, therefore, thus and then.
PUNCTUATION

Apostrophes
- Use an apostrophe and an s to form the possessive of a noun.
- Use the apostrophe alone to form the possessive of a plural noun ending in s.
- Use the apostrophe and an s to form the possessive of most singular nouns and names ending in s. Example: Charles’s.

Parenthesis
- Use parentheses to enclose material that is relevant to the subject but doesn’t contribute to the specific thought.
- Use parenthesis around numbers or letters that mark off division in the text.

Quotation Marks
- Use quotation marks to enclose words used other than in the normal fashion.
- Use quotation marks to enclose direct quotations.
- Use quotation marks to enclose words, which convey a special meaning.
Narrating
In
CARES

Public, Mary   CID# 123456789

-------------------------------------------

-------------------------------------------
General Rules and Reminders

✓ Enter narration about every contact and event that affects a case, which includes but is not limited to:
  • Individual appointments
  • Phone calls
  • Applications received
  • Interim changes
  • Documentation and verification requested and received
  • Actions taken
  • Appeals received
  • Fraud reports
  • Redeterminations
✓ Leave a space before each new entry.
✓ Use clear and concise language.
✓ Use only standard abbreviations. (See Section VI)
✓ Record information in paragraph form.
✓ Record only facts NOT opinions.
✓ Record pertinent facts to provide the following information:
  • Type of contact (individual appointment, phone, etc.)
  • Who was involved
  • Who needs assistance
  • What specific problems or issues need resolution
  • What information was provided
  • What figures were used
  • What information was requested; if non-mandatory, the reasons why
  • What decisions were made
  • What facts justify the actions
  • What are the expected outcomes
  • What are the pertinent timelines if any
  • What processing delays occurred
  • What facts justify the delay
  • Include alerts to follow up on deadlines
  • What date the information is due and what action needs to be taken if the material is not provided by the due date.

Note: Be sure to create an alert so follow-up action can be taken in a timely manner.
Record clear and sufficient facts to support all case actions/decisions
Cite responsibility for errors to agency **NOT** to individuals
Provide facts/verifications that support all corrections of errors.
Always cross-reference AUs when there are two different heads of households but they have mutual household members.

**Note:** *Failure to list another AU may result in important information not being considered.*

Narrate in the following format:

- **Begin** every narration by recording:
  - Head of Household (HOH) name
  - Head of Household (HOH) Client Identification (CID#)
  - Date of contact or event
  - Narrator’s first initial and last name
  - District Office

- **Continue** narration by recording pertinent facts in paragraph form
  - Describe the situation
  - Report discussion with customers
  - List verifications received with date of receipt
  - List verifications waived with facts why
  - List options presented to customer
  - Record decisions regarding options
  - Note delays in processing with facts why

- **Conclude** narration
  - Record facts that support all case and program decisions and actions
  - Delineate the Temporary Cash Assistance (TCA) decision from the Food Stamp (FS) decision and from the Medical Assistance (MA) decision
  - State specifically the action taken regarding MA in all closed/denied TCA cases
Narrating Specific Situations

The following instructions list the facts and information that must be entered into the narration to support decisions made and actions taken following the specific contacts and events listed.

Application Assessment

- List of programs for which the customer is applying
- Description of his/her situation
- Results of the assessment (include any language barriers/problems)
- List of all appointments given
- Discussed the customer’s rights, responsibilities and voter registration
- Discussed and signed the DHR/FIA #9707

Interview with Case Manager/FIP Counselor

- Description of customer’s situation
- Details of customer’s past management
- Amount of income or prior income
- Resources
- Shelter expenses
- List of missing information
- Statement about any questionable information
- Statement about discussion with the customer regarding specific program requirements
- List of any appointments scheduled
- List referrals to other agencies or services (include referrals for an interpreter, English as Second Language, etc.)
- Statement and documentation on instances of non-cooperation, sanction or disallowances
- Facts to support the eligibility decision
- Certification dates if eligible
- Facts to support the decision that a customer is not eligible for benefits
- Statement about the customer’s reason for withdrawing an application for benefits
**Interim Change**
- State the change
- Record known details regarding the change
- Discuss the verifications required/obtained
- Include the outcome of the change

**Redetermination**
- Documentation of the current situation, including the new period covered
- Statement of the interviewer’s finding
- Statement of the interviewers conclusions
- Discussed the customer’s rights, responsibilities and voter registration
- Include verifications requested/obtained
- Note if any follow-up is needed.

*Note: Entering the phrase “Redet completed” is insufficient documentation in the narrative to support any decisions made or actions taken.*

**Purchase Of Care (POC) Narrative**
- Record of the date the application was received
- List of other programs in which the customer is active or pending
- Income information
- Employment information
- Household members
- Documentation of special needs children and need for additional compensation
- Notation if care is to be provided by an Informal Child Care provider
- Results of any Child Protective Services (CPS) screenings

*Note: The content of a POC narration applies whether the narration is recorded in CARES or on the form #494, a case narration sheet.*
Documentation

Documentation shall include, but is not limited to:

☑️ **Current Situation**
- Give a brief overview
- Include names and ages of all household members
- Explain who is excluded and why
- Explain what benefits the customer is applying for
- Narrative entered by counselors should reflect the situation, include any problems/barriers facing the customer and decisions regarding removing the barriers/problems (include language barriers and referrals).

☑️ **Past Management**
- Inquire and document how the household supported itself prior to applying for assistance.
- Include calls to other states to verify that a customer who recently moved here is not receiving benefits in another state. If cash assistance was received, document the number of months received. Include the phone number and name of contact.

☑️ **Income**
- Discuss all income (earned and unearned) by type (unemployment benefits, child support, etc.) and amount.
- Include the employer’s name and if no longer employed, the end date.
- Document if there is no income.
- Include potential income (filed for UIB & date, etc).
- Include any deemed, excluded, third party or in-kind income.
- For TCA, verify if the customer resides in subsidized housing.
- For TCA and Food Stamps, verify if money from friends or relatives is a loan that must be repaid.
- For MA cases, remember to complete the #1169, Referral for Potential Recoveries, if there is a settlement pending due to an accident.

☑️ **Resources**
- Indicate if there are any resources/assets (checking, savings, etc), document if there are none.
☑️ **Shelter Expenses**  
- List the type, amount and how often paid.  
- Is heat included in the rent? Discuss utility allowance vs. actual expenses and which option the customer chose.  
- Is there a deficit budget?  
- Document if there are no shelter expenses.

☑️ **Outstanding Information**  
- Document what was requested and when it is due.  
- Include all outstanding appointments and dates.  
- If the information is needed only for a specific program, specify the program.  
- If you request verification because of a questionable situation, document the reason.  
- Be sure to note the due date to receive outstanding information.

☑️ **Questionable Information/Alternate Source of Verification**  
- Discuss why questionable and how resolved.

☑️ **Non-Cooperation, Sanctions and Disallowances**  
- Provide details (failed to keep appointment etc).

☑️ **Family Planning**  
- For TCA, indicate family planning and child support policies were discussed.  
- For Food Stamps, indicate family planning and FSET were discussed.

☑️ **Withdrawn Requests**  
- Record the reason; make sure the request is in writing.

☑️ **Decision**  
- Documentation must support the eligibility decision and it must be in sufficient detail so that anyone else can determine the reasonableness and accuracy of the determination.
Standard CARES Procedures

Screeners begin the narrative with the screening session. Screeners also enter the pertinent information on the paper log-in sheet. This entry is important for the larger counties, which have more than one screener, to let workers know who screened the case. Workers will follow up and continue the narrative during their interview or change sessions.

Use the “ADDR” screen for narratives, not the “DONE” screen. If there is an associated case with a different Head of Household it is safer to access the narrative from “ADDR”, as narrative accessed from “DONE” will only go to one client’s narrative screen.

“NARR” is accessed from the “ADDR” screen and can be brought up by hitting the “F9” and “Shift” keys at the same time on the PC keyboard. (PF21 key on dumb terminals).

There is no automatic spell-check in CARES. Correct spelling is the narrator’s responsibility.

To move to the next line when typing in CARES, it is necessary to use the TAB key at the end of every line. There’s no automatic word-wrap from line to line in CARES.

ALWAYS hit the space bar one time BEFORE beginning to type. The first space from the margin is the delete field. Entering a “D” in this space and pressing the “ENTER” key will delete that line.

The “F3” key on the PC (PF13 key on the dumb terminal) will take you to the most recent page. The “F7” key on the PC (PF7 on the dumb terminal) will page back though the narrative.

The initial narrative is committed by pressing “ENTER,” which will then return to the “ADDR” screen. Note: If “F3” is pressed before “ENTER” to commit the narrative, the narrative will be erased.

If the case “abends” while in the narrative, it will be lost. The narrative does not go to the Scratch Pad Area (SPA).
To update the narration on a closed case:

- Go into the case historically, to a month in which it was active
- Go to the “AMEN” screen
- Select option “R”
- Enter the historical month in the BENEFIT MONTH field.
- Use the Client ID number

Narration can only be reviewed or inquired on a denied case by using the client ID if there is another pending or active AU on the customer.

To review the narration on a closed/denied case, select option “B” and use the client ID.

Simulcast/playback can be useful for counties to write standard text information in the narration. (Refer to the attached instructions to set the simulcast/playback).
Simulcast/Playback
(IDEA Terminal)

To create the message:

1. From the DHR Welcome screen, press clear.
2. To begin the recording process, press ALT and the ER EOF key at the same time.
3. A prompt: “PF key?” will display. Select any PF key for the intended message.
4. Press the selected PF key. “Record” will appear on the bottom of the screen.
5. Begin typing the message.
6. Check the message for accuracy.
7. To save the message, press ALT and the ER EOF key at the same time. The “Record” message will disappear from the screen. The message is complete.

To place the pre-recorded message in the Narrative:

1. From the ADDR screen, PF21 to NARR.
2. Place the cursor at the space where the recorded message will be added.
3. Press the “copy play” key.
4. The PF keys will display in a box. (Highlighted keys have messages attached). Select the correct PF key.
5. The message will be displayed on the screen.
6. Press enter to record the message in the narrative.

To delete a PF message:

1. From the DHR Welcome screen, press ALT and the ER EOF key.
2. Select the PF key you want to record over. The machine will beep.
3. Press the delete key ( a oundation).
4. The selected PF key will no longer be highlighted.
Simulcast/Playback
(PC)

To record the message:

1. On the NARR screen, place the cursor where the recorded message will appear.
2. Select Tools (from the standard toolbar)
3. Select Macro
4. Type the name of the message in the name box (ex. TCA narrative)
5. Select record (the record Macro box will appear)
6. Select “OK” if the Macro Name is correct
7. The EXTRA! Basic Macro Recorder will appear in the lower right hand corner of the screen.
8. Type the message, as it should appear in the narrative.
9. When the typed message is completed, click the Stop button (blue square) in the EXTRA! Basic Macro Recorder
10. Press enter to return to the ADDR screen

To place the message in the Narration:

1. On the NARR screen, place the cursor where the recorded message will appear.
2. Select Tools
3. Select Macro
4. Select the name of the message (ex. TCA narrative)
5. Select run; in a few seconds, the message will appear
6. Press enter to return to the ADDR screen

To delete the Macro Message:

1. Select Tools
2. Select Macro
3. Select the Macro name to delete
4. Select delete
Narratives should be clear, concise and contain information on the household size, program of choice, income, resources, and the household circumstances.

Case managers should ask themselves, “If I didn’t know anything about this case could I pick up the case and understand why this action was taken?”

Narratives should not include your opinion about customer. State only the facts surrounding the case.

Use only standard abbreviations that everyone can understand.
Sample narratives are included in this package although the program of choice may vary. Each narrative includes the facts surrounding the case. There are similarities in each scenario.

Each narrative should include the following information:

♦ Household composition

♦ Date of application

♦ Where the customer applied

♦ Who is the case manager

♦ When the verifications were presented

♦ Statements from the customer

♦ What verifications were supplied at the time of interview

♦ What verifications remain outstanding from the customer

♦ When the information is due

♦ What action is taken

♦ Narratives are descriptive. They should not leave questions.
CLIENT ID# 302000005 NAME: JENNY JONES

10/15/01 R. SMITH – RECEIVED INFO. THAT MS. JONES FAILED TO COMPLY WITH CHILD SUPPORT REQUIREMENTS. SHE DIDN’T KEEP HER APPT WITH STATES ATTORNEY’S OFFICE (SAO).

10/17/01 R. SMITH – SENT A LETTER TO MS. JONES TO INVESTIGATE REASONS FOR HER “NO SHOW” WITH SAO.

“DECISION/ACTION TAKEN.”

10/24/01 R. SMITH – LEFT PHONE MESSAGES ON ANS. MACHINE. (NO RESPONSE FROM MS. JONES) NOAA SENT AND CASE IS BEING SANCTIONED.

12/1/01 R. SMITH – EFFECTIVE DATE SANCTION. MS. JONES IS NOT ELIGIBLE FOR MA BUT HER DAUGHTER RETAINS MA.

12/4/01 R. SMITH – REC’D CALL FROM MS. JONES WHO SAID SHE WAS ILL AND UNABLE TO KEEP APPT. WITH SAO. WANTS TO RESCHEDULE.

12/16/01 R. SMITH- CALLED MS. JONES AND GAVE HER A NEW APPT. DATE OF 12/22/01 WITH THE SAO.

12/24/01 R. SMITH – CALLED SAO TO VERIFY IF MS. JONES KEPT HER APPT. ON 12/22/01. CONFIRMATION REC’D. MS. JONES DID KEEP HER APPT. WITH SAO.
CLIENT ID# 302000005 NAME: JENNY JONES

“DECISION/ACTION TAKEN.”
12/26/01 R. SMITH –RE-OPENED THE TCA CASE, AND CLOSED THE MA FOR CHILD ONLY. MS. JONES WILL RECEIVE FULL BENEFITS FOR THE MONTH OF DECEMBER.
TEMPORARY CASH ASSISTANCE

ASSESSMENT:
5/27/01 J. DAWSON (DO-122) CID# 429891158, REGINE DAVIS
MS. DAVIS (27) APPLYING FOR TCA FOR SELF AND DAUGHTER
JENNIFER MCCARTER (7). CURRENTLY SHE IS ACTIVE FS.
HAS BEEN LOOKING FOR EMPLOYMENT. MS. DAVIS STATES
SHE WAS EMPLOYED FOR 9 YEARS WITH HER LAST
EMPLOYER. SHE ALSO STATES SHE RECEIVED 3 UIB CHECKS
THIS MONTH. DOES NOT RECEIVE CS AND HAS NO OTHER
INCOME. SHE STATES HER ONLY RESOURCES ARE A SMALL
CHECKING ACCT. AND AN AUTO (87 ESCORT). WE DISCUSSED
TCA REQUIREMENTS AND SCHEDULED MS. DAVIS FOR TCA
ORIENTATION ON 6/5 AND CS ORIENTATION ON 6/11. TCA
INTERVIEW SCHEDULED FOR 6/7 AT 10:30 WITH CASE
MANAGER M. GOODE.

TCA INTERVIEW
06/7/01 (DO122) M. GOODE CID# 429891158, REGINE DAVIS
MS. DAVIS IN FOR TCA FOR SELF AND DAUGHTER JENNIFER,
7. SHE IS ACTIVE FS AND HER REDET IS SCHEDULED FOR 6/18.
INITIATED REDET AND NOTIFIED THE FS WORKER THAT I
WILL COMPLETE THE REDET. MS DAVIS IS UNEMPLOYED,
HER UIB ENDED IN 5/01, SHE RECEIVED $324 PER MABS
CLEARANCES (Z03). AGENCY NOTIFIED WHEN SHE APPLIED
ON 5/27, INCOME REMOVED FOR 6/01 AND FS SUPPLEMENTED
BASED ON $0 INCOME. BEG APPROVED BY SUPERVISOR. SHE
STATES SHE HAS NO OTHER INCOME. SHE HAS A CHECKING
ACCOUNT AND AN 87 FORD ESCORT AND LIVES IN SECTION 8
HOUSING. CUSTOMER WAS INFORMED OF THE $60.00
DEDUCTION OF THE TCA GRANT. SHE PAYS $38/MO RENT
PLUS UTILITIES (LUA). MS. DAVIS STATES RENT MAY
CHANGE DUE TO INCOME CHANGE. I INFORMED HER OF THE
10 DAY REPORTING REQUIREMENT, RIGHTS, &
RESPONSIBILITIES WERE DISCUSSED, CUSTOMER
06/7/01 (DO122) M. GOODE CID# 429891158, REGINE DAVIS

SIGNED THE 9707 AND A COPY WAS GIVEN TO MS. DAVIS. WE ALSO DISCUSSED TIME LIMITS, WORK REQUIREMENTS AND F/P. SHE HAS BEEN TO TCA ORIENTATION. HAS APPT SCHEDULED 6/11 FOR CS.
DOMESTIC VIOLENCE

CLIENT ID #515000009 NAME: BETTY BROWN

04/20/01 R. SMITH – TCA REDET - DURING THE INTERVIEW MS. BROWN PROVIDED ALL VERIFICATIONS NEEDED TO PROCESS THE CASE. CUSTOMER CERTIFIED FOR TCA BENEFITS UNTIL 10/31/01. AT THE CONCLUSION OF THE INTERVIEW MS. BROWN INDICATED THAT HER EX-HUSBAND, MR. BROWN, WAS PHYSICALLY ABUSING HER. SHE FURTHER STATES, “HE SLAPS ON ME, AND IT HAPPENS WHEN HE VISITS THE KIDS EVERY OTHER WEEKEND.”

“DECISION/ACTION TAKEN.”
4/20/01 R. SMITH – IT WAS EXPLAINED TO MS. BROWN THAT HER REPORT OF DOMESTIC VIOLENCE IS CONFIDENTIAL. A DHR/FIA-461 FORM COMPLETED AND GIVEN TO MS. GATES, THE IN-HOUSE FAMILY VIOLENCE EXPERT- WHO WAS AVAILABLE TO SEE MS. BROWN TODAY.

4/22/01 R. SMITH- RCVD. DOCUMENTATION FROM MS. GATES, WHICH INCLUDES A SAFETY PLAN SIGNED BY MS. GATES AND MS. BROWN. MS. BROWN WILL BE IN COUNSELING FOR 6 MOS. WITH THE SERVICE PROVIDER, FUNDED BY DHR’S COMMUNITY SERVICES ADMINISTRATION.

“DECISION ACTION TAKEN.”
CUSTOMER IN TO APPLY FOR FOOD STAMPS FOR SELF AND TWO CHILDREN, ALEX, AGE 2 AND ABBY AGE 3. CUSTOMER WORKS PART-TIME CLEANING HOMES. SHE CONSIDERS HERSELF SELF EMPLOYED AND BRINGS HOME $75.00 WEEKLY. SHE LIVES WITH HER AUNT, SALLY SOUP, AND CLAIMS THAT THEY PURCHASE AND PREPARE SEPARATELY. SHE PAYS HER AUNT $100 A MONTH RENT WHICH INCLUDES UTILITIES. CUSTOMER’S MOTHER, WHO LIVES NEXT DOOR, WATCHES HER CHILDREN FOR FREE WHILE CUSTOMER WORKS. CUSTOMER STATES SHE HAS NO CAR, NO BANK ACCOUNTS, NOR ANY ASSETS. CUSTOMER CLAIMS SHE RECEIVES NO CHILD SUPPORT. FATHER OF CHILDREN LEFT HER LAST YEAR AND SHE DOES NOT KNOW HIS WHEREABOUTS.

CUSTOMER IS NOT EXPEDITABLE SINCE EXPENSES DO NOT EXCEED INCOME. CUSTOMER PENDED FOR RENT FORM AND VERIFICATION OF INCOME.

4/7/01 S. DIGGS – DSS #341, ALICIA BROWN CL#214547541
CUSTOMER RETURNED VERIFICATION OF RENT AND INCOME.

“DECISION/ ACTION TAKEN,”
FOOD STAMPS CASE IS CERTIFIED 04/01-07/01.
MR. WARD AND MRS. JUNE CLEAVER ARE IN TO APPLY FOR MEDICAL ASSISTANCE FOR THEIR FAMILY. THEY HAVE TWO MINOR CHILDREN, THEODORE, AGE 16, AND WALLY AGE 10. THEY ARE APPLYING FOR FAC MA. RIGHTS & RESPONSIBILITIES WERE DISCUSSED AND THE CUSTOMER’S SIGNATURES WERE OBTAINED. WARD IS EMPLOYED F/T FOR ALLSTATE INSURANCE COMPANY AND JUNE IS A HOUSEWIFE. THEY CLAIM ONE CHECKING ACCOUNT AS THEIR ONLY RESOURCE AND PRESENTED 3 BANK STATEMENTS AT THE TIME OF INTERVIEW (VERIFIES $75.00 BALANCE PER THE CUSTOMER’S STATEMENT). MR. CLEAVER’S GROSS MONTHLY INCOME IS $1450.00 AND HE IS PAID MONTHLY.

DECISION/ACTION TAKEN
THE FAC (AU #123456789) CASE REMAINS PRESERVED. THE CLEAVER’S SPENDDOWN AMOUNT WAS $5850.00. MEDICAL BILLS TOTALING $2450.00 WERE ENTERED. THE REMAINING SPENDDOWN AMOUNT IS $3400.00. 2 MCHP (AU #987654321; AU #234567890) CASES WERE CERTIFIED ON-GOING 7/01/01-06/30/02, FOR BOTH CHILDREN.
CUSTOMER APPLIED FOR POC ON 12/14/00 FOR HER 2 YOUNGEST CHILDREN. MS. PALMER HAS 3 MINOR CHILDREN, WHICH MAKES THIS A HH OF 4. CLIENT IS CURRENTLY EMPLOYED AT McDONALD’S AND WAS RECEIVING TCA AT THE TIME OF APPLICATION. WAGE FORM VERIFYING EMPLOYMENT WAS SUBMITTED ON 12/15/00. APPL. COMPLETE CLIENT WAS ISSUED VOUCHERS FROM 12/15/00 THRU 1/14/01. THE CUSTOMER’S PERIOD OF ELIGIBILITY IS 12/15/00-12/14/01 FOR BOTH CHILDREN FOR FT CARE WITH A CO PAY. CLIENTS EARNINGS WERE CALCULATED AS FOLLOWS: 96.00 + 231.00 = 327.00 DIV. BY 2 = 163.50 BI WKLY AVERAGE EARNINGS. THIS INCOME PLACES CLIENT AT SUBSIDY LEVEL A. SHORT TERM VOUCHERS ISSUED AT THIS TIME SINCE EMPLOYER HAS STATED THAT CLIENT HAS COPAY OF 4.00/MONTH PER CHILD. IN 12/00, CLIENT WILL NEED HER LAST 2 BI-WEEKLY CONSECUTIVE PAYSTUBS IN ORDER TO RECEIVE FUTURE VOUCHERS. NEXT REDET IS DUE 12/14/01.
CID #951951951, PUBLIC, TANISHIA

06/04/01 SMITH, J. (DO-30) THE CUSTOMER IS ELIGIBLE FOR EMERGENCY ASSISTANCE (EA) TO ASSIST WITH AN EVICTION. ALL VERIFICATIONS WERE RECEIVED AND A CHECK WAS ISSUED TO THE VENDOR, #342342, FOR $438.

ABBREVIATIONS, CODES & DEFINITIONS