



CalSAWS | CAPI In-Kind Support and Maintenance (ISM)

Fact Sheet

Purpose

The purpose of this fact sheet is to show how the CAPI Benefits Analyst (BA) can enter specific details from the SOC 453 form to calculate the In-Kind Support and Maintenance (ISM) using the new ISM income type functionality introduced with SCR CA-208537.

The following steps should be taken to automatically calculate the ISM amount deemed to the Client.

What Should You Do?

1. Place the cursor over **Eligibility** on the [Global navigation bar](#).
2. Select **Customer Information** from the [Local navigator](#).
3. Click **Financial** in the [Task navigation bar](#).
4. Click the **Income link** in the [Task navigation bar](#) to access the **Income List** page.
5. Select **Miscellaneous** from the **Income Category** drop list.
6. Click the **Add** button to access the **Income Detail** page in Add mode.
7. Select CAPI participant from the **Name** field drop-down options on the **Income Detail** page (see screen print below).
8. Select **In-Kind Support and Maintenance (ISM)** from the **Type** field drop-down options on the **Income Detail** page (see screen print below).
9. Add income source in the **Source** text field on the **Income Detail** page. This step is Optional.
10. Select **Monthly** in the **Frequency** field drop-down options on the **Income Detail** page (see screen print below).
11. Add any notes in the **Description** text field on the **Income Detail** page. This step is Optional.



Income Detail

* - Indicates required fields

Save and Add Another

Save and Return

Cancel

Name: *

75F ▼

Retrieve Information

Category:

Miscellaneous

Type: *

In-Kind Support and Maintenance (ISM) ▼

Source:

Frequency: *

Monthly ▼

Description:

12. Under **Income Amounts**, select **Cash/CalFresh** from the **Display Program** drop-down options.
13. Click the **Add** button to access the **Income Amount Detail** page in Add mode.
14. Select the appropriate choice from the **New Change Reason** drop-down options.
15. Enter the current date in the **New Reported Date** field.
16. In the **ISM Calculation** section, enter the responses and values based on the SOC 453 form (see screen print below).

Note: 'What is the Pro Rata Share?' value is a dynamically populated based on the values entered for 'How many people live in the household (including CAPI applicant)?' and 'What are the household's total monthly expenses?' fields.



ISM Calculation

Does the CAPI applicant/recipient live in a public assistance household? *	<input type="text" value="No"/>
Does CAPI applicant/recipient live alone? *	<input type="text" value="No"/>
Does CAPI applicant/recipient live with spouse? *	<input type="text" value="Yes"/>
Does CAPI applicant/recipient live with spouse and/or minor children only? *	<input type="text" value="No"/>
Is this a CAPI couples' case? *	<input type="text" value="Yes"/>
How many people live in the household (including CAPI applicant/recipient)? *	<input type="text" value="4"/>
Does the CAPI applicant/recipient receive food and shelter assistance from one or more members of the household? *	<input type="text" value="No"/>
Does the CAPI applicant/recipient receive non-medical care from one or more members of the household? *	<input type="text" value="No"/>
Is outside ISM applicable? *	<input type="text" value="No"/>
What are the household's total monthly expenses? *	<input type="text" value="4000"/>
What is the Pro Rata Share? *	<input type="text" value="2000"/>
What is the CAPI applicant/recipient's contribution to the household's monthly expenses? *	<input type="text" value="500.00"/>
What is the date that the CAPI applicant started living in the household? *	<input type="text" value="09/01/2023"/>

17. Enter the effective date of the ISM income in the **Begin Date** field.
18. Select **Verified** from the **Verified** drop-down options.
19. Click **Save and Return** on the **Income Amount Detail** page.
20. Click **Save and Return** on the **Income Detail** page.
21. Run EDBC for CAPI program. **Note:** The calculated ISM amount will display under the **Unearned Income** of the **CAPI EDBC Summary** page (see screen print below).

Regular Budget		Regular	
Unearned Income		\$	<u>238.50</u>
Unearned Income Disregards		-	<u>20.00</u>
Net Unearned Income		=	218.50

Click the **Unearned Income** hyperlink to see details (see screen print below).

EDBC Person Line Item Detail - Unearned Income

				Close	
Name	Type	Description	Amount		
██████████ 75F	In-Kind Support and Maintenance (ISM)	(10/01/2023) \$238.50	\$ 238.50		
			Total	\$	238.50