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

Fact Sheet

Purpose

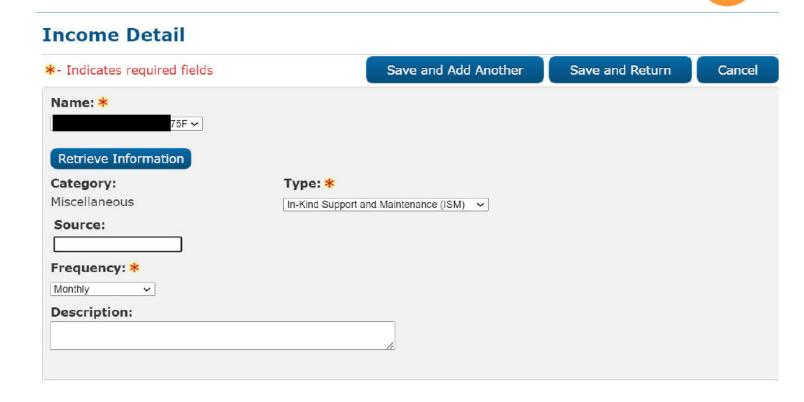
The purpose of this fact sheet is to show how the CAPI Benefits Analyst (BA) can enter specific details from the SOC 453 form to calculate the In-Kind Support and Maintenance (ISM) using the new ISM income type functionality introduced with SCR CA-208537.

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

What Should You Do?

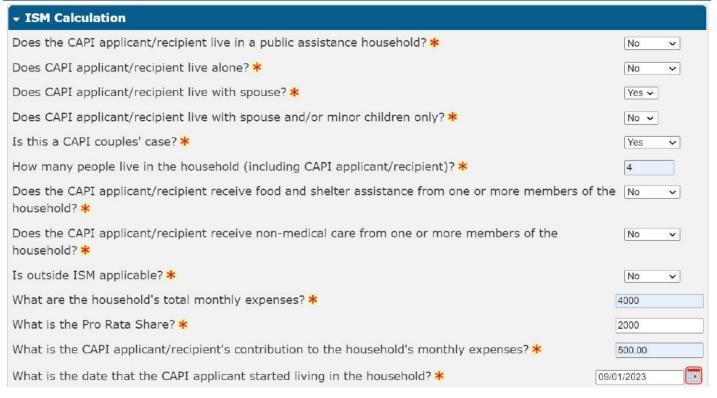
- 1. Place the cursor over **Eligibility** on the Global navigation bar.
- 2. Select **Customer Information** from the <u>Local navigator</u>.
- 3. Click **Financial** in the <u>Task navigation bar</u>.
- 4. Click the **Income link** in the Task navigation bar to access the **Income List** page.
- 5. 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.
- 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.

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- 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.



- 17. Enter the effective date of the ISM income in the **Begin Date** field.
- 18. Select **Verified** from the **Verified** drop-down options.
- 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	\$	238.50
Unearned Income Disregards	-	20.00
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		Туре	Description	Amount
	75F	In-Kind Support and Maintenance (ISM)	(10/01/2023) \$238.50	\$ 238.50
			Total	\$ 238.50