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Effective December 1, 2015

Policy No. CS:08.0

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### **Adjunctive Income Eligibility**

#### **Purpose**

To allow automatic income eligibility, for the WIC Program, for those applicants who are determined to be adjunctively income eligible.

#### **Authority**

7 CFR Part 246.7; 25 TAC §31.22

#### **Policy**

An applicant for WIC is adjunctively income eligible when the applicant is:

1. Certified as fully eligible to receive Supplemental Nutrition Assistance Program (SNAP), formerly known as Food Stamps;
2. Certified as fully eligible for Temporary Assistance to Needy Families (TANF);
3. Certified as fully eligible or presumptively eligible for Medicaid, including the Medicaid Women's Health Program;
4. A member of a household in which any eligible participant is certified as fully eligible to receive assistance under TANF; or
5. A member of a household in which any pregnant woman or infant is certified as fully eligible to receive Medicaid.

References to the Medicaid Program in this policy are inclusive of the Medicaid Women's Health Program (WHP) unless specified otherwise.

#### **Definitions**

Adjunctive income eligibility – expedited income eligibility for individuals and certain household members who participate in the SNAP, TANF, or Medicaid program.

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Automated Voice Response System (AVR) is operated by the Texas Health and Human Services Commission (HHSC) and is available 24 hours a day through a toll-free number. If applicants know their TANF or SNAP case number, but have brought an unacceptable HHSC form or no form at all, WIC LA staff may call 1-877-541-7905, select either TANF or SNAP and enter the applicant's case number to verify active status.

For clinic sites without a touch-tone phone, the AVR has voice recognition and the case number can be spoken and understood. This line is busiest between 11:00 AM and 3:00 PM, and particularly during the first week of each month when benefits are mailed. WIC LA staff may choose to call their local HHSC office if they are unable to reach the AVR system.

In order to determine eligibility, use the applicant's case number, not the balance/dollar amount of SNAP benefits since merely having a balance does not reflect the applicant's current status.

A Lone Star Card may be issued to a TANF or SNAP recipient for electronic benefits transfer (EBT). The Lone Star Card is not acceptable proof of participation in TANF or SNAP as there is no indication on the debit card if the card is still valid or active. In order to determine eligibility using the debit card, use the AVR system described above.

Household is defined as a group of related or non-related individuals who are living together as one economic unit, except that residents of a homeless facility or an institution shall not all be considered as members of a single household. Participation in one of the three gateway programs for an infant/child placed by the DFPS shall not be used by another member of the foster family's household for adjunctive income eligibility.

A SNAP recipient may be one individual or a group of individuals who are determined eligible for benefits. Most SNAP forms are issued in the name of the head of household. Other unnamed family members may also be recipients. When an applicant/parent guardian is applying for an unnamed family member, the LA shall verbally inquire if the unnamed family members are eligible to receive SNAP benefits. In such cases, the LA shall accept

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documentation, which identifies that the head of the household and other unnamed family members are certified to receive benefits as described in Procedure I. E.

Gateway program is defined under this policy as SNAP, TANF, or Medicaid.

Presumptive eligibility is granted to some Medicaid Program applicants, excluding the WHP, to confer a temporary eligibility status before they have completed the application process and have been determined fully eligible. Limited Medicaid benefits to pregnant women may be presumptively granted based on their categorical eligibility. Such recipients are removed from these programs if they are later determined to be ineligible once the application process has been completed. Although ultimately some clients may be determined ineligible, program data shows such persons characteristically prove to be fully eligible and this is not a frequent cause of persons ceasing to receive benefits under this program. Even when persons cease to be certified under this program, the possibility remains that they may still meet WIC income guidelines; therefore, WIC regulations allow for a client who is presumptively eligible for Medicaid to be considered income eligible for WIC benefits. After WIC certification the client is not required to prove they were subsequently certified as fully eligible for Medicaid. There is no presumptive eligibility for SNAP, TANF, or the WHP.

Provider Help Desk for Your Texas Benefits Card is operated by the Texas Health and Human Services Commission (HHSC) and can be reached at 1-855-827-3747. WIC staff may call the Provider Help Desk to verify current Medicaid eligibility when an applicant presents Your Texas Benefits Card as there is no indication on the card that the recipient is currently participating in the Medicaid Program. Staff should choose Option 3 – Non Provider to enter the Medicaid number listed on the front of the Your Texas Benefits Card (YTBC) and the applicant's date of birth. The system will indicate "eligible for services" or "not eligible for services". Staff may also call the Provider Help Desk for YTBC to verify current Medicaid eligibility for applicants who know their Medicaid client identification number or whose number is on file but have brought an unacceptable HHSC form or no form at all.

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Your Texas Benefits Card (YTBC) is issued to each person who participates in the Medicaid program. YTBC is not acceptable proof of current participation in Medicaid because the card does not reflect eligibility periods. Therefore, staff must verify participation in the Medicaid program as described in Procedure I.B.2. of this policy.

### Procedures

- I. When determining income eligibility staff shall inquire if the applicant is fully eligible to receive SNAP or TANF benefits, or fully/presumptively eligible to receive regular Medicaid benefits or fully eligible to receive Medicaid Women's Health Program benefits.

If the applicant is not eligible for benefits from one of these three gateway programs, the LA shall inquire if the applicant is a member of a household that is fully eligible to receive TANF or a member of a household in which a pregnant woman or an infant is fully or presumptively eligible to receive Medicaid.

A. Adjunctive eligibility shall be determined at each certification.

B. Current status shall be determined by:

1. Visual review of acceptable written documentation or proof obtained from an electronic device authorizing current eligibility in one of the gateway programs. A copy of the document is not required for the participant's file.

Acceptable forms include those identified on the Family Certification Form/WIC Program Income Screening Form (WIC-35) and any form, including those without a form number, authorizing gateway eligibility for a certification period which includes the date of application to WIC.

Example: Form indicates certification period 1/1/XX – 6/30/XX. Date of application to WIC 5/3/XX. The form is an acceptable

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document as the application to WIC is before the expiration date listed on the form. ; or

2. Inquiry by phone or on-line computer system by the local agency for the SNAP, Medicaid Program, or TANF Program **may** be used when an applicant fails to bring proper documentation of their current eligibility status for SNAP Medicaid, or TANF benefits or presents Your Texas Benefits Card. LA staff shall obtain verbal permission from the applicant to conduct the phone inquiry.
  - a. SNAP and TANF can be verified through the HHSC Automated Voice Response System (AVR) at 1-877-541-7905. Staff should select Option 1 for English or 2 for Spanish, and then select Option 2 - Benefit Information. Select Option 1 for all Medicaid, SNAP and TANF information. Once prompted enter in clients information and select Option 1 again to hear benefit status (stay on the line to talk to a representative).
  - b. Medicaid eligibility can be verified through the Provider Help Desk for YTBC at 1-855-827-3747.
  - c. Forms obtained from an on-line computer system can be accepted if they clearly indicate the applicant is eligible for one of the gateway programs.
  
- C. Documentation from only one of the three gateway programs is required per applicant. When entering client data into the WIC Information Network (WIN), answer "Y" only once to indicate the gateway program used in determining eligibility even if the applicant indicates they are receiving assistance from more than one gateway program.
  
- D. Adjunctive income eligibility shall be documented on the WIC-35 as described in **Policy CS: 14.0**. Participation in the Women's Health Program is documented as Medicaid.
  
- E. Applicants eligible to receive SNAP benefits shall provide one of the following:

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1. proof showing the applicant himself/herself is eligible to receive such benefits. Minors applying for themselves who reside with their parents and provide proof the parent is eligible to receive SNAP benefits (LA staff shall verbally inquire if the applicant is eligible to receive SNAP) shall be considered adjunctively income eligible as they are considered in the economic unit.
  2. proof showing the parent/guardian applying on behalf of an infant or child receives such benefits for himself/herself or any household member.
    - a. A newborn infant who becomes part of a SNAP household shall be deemed adjunctively income eligible for WIC.
    - b. Other household members shall be considered adjunctively income eligible if the parent/guardian states the family/household members are certified to receive SNAP benefits. If the other household members are **not** certified to receive SNAP benefits, the LA staff shall determine if the household members are eligible under another gateway program or procedures of **Policy CS:07.0**, Income Screening as a Certification Requirement.
  3. proof showing the applicant resides with the parent/guardian named as the SNAP head of household if the WIC applicant himself/herself is not specifically named on the form.
    - a. For applicants or parent/guardians applying on behalf of a child, compare the proof of residency presented by the applicant or parent/guardian to the address on the SNAP form for the head of household. The two addresses shall match; or
    - b. if the applicant or parent/guardian applying on behalf of a child does not have proof that their address matches the address of the SNAP head of household, the adult shall provide a signed written statement or a Residency Form (WIC-RO2) with section C completed by the head of household confirming the living arrangements.
- F. Applicants eligible to receive TANF or eligible/presumptively eligible to receive Medicaid benefits as applicable shall provide proof. WHP eligibility can only be used for adjunctive income eligibility by

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postpartum and breastfeeding women. Proof of Medicaid for participant shall be accepted regardless of who is listed as the parent/guardian and regardless of Department of Family and Protective Services (DFPS) Placement.

G. Applicants applying for WIC based on a household member's eligibility for TANF or Medicaid, excluding the WHP, shall provide one of the following:

1. proof showing a pregnant woman or infant household member as a Medicaid recipient or the household member's eligibility for TANF; **and**

Note: A pregnant woman can present any current acceptable Medicaid document to qualify another member in the household. The Medicaid would not have to specify that it is Pregnant Medicaid. A pregnant woman's Medicaid eligibility ends on the last day of the second month following the month the pregnancy terminates; therefore, her infant could be determined eligible based on the mother's Medicaid until two months of age. The infant's presumptive eligibility may be used to adjunctively certify other household members. A fully eligible infant can also adjunctively qualify other household members. The infant and other household members shall be certified for a full certification period.

Example: Infant is born May 5<sup>th</sup>. Mother's Medicaid ends on July 31<sup>st</sup>. Infant is adjunctively income eligible if application to WIC is on or before July 31<sup>st</sup>. Household members can be enrolled using the infant's presumptive Medicaid eligibility if the application to WIC is on or before July 31<sup>st</sup>. Document the name of the gateway recipient on the WIC-35 per **CS:14.0**.

2. proof showing the applicant resides with the TANF or Medicaid recipient:

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- a. applicant's or parent/guardian's proof of address (utility bill, etc.) shall match the address of the TANF or Medicaid recipient shown on the form; or
  - b. if the adult applying for herself or a child does not have proof that their address matches the address of the TANF or Medicaid recipient, the adult shall provide a signed written statement or Residency Form (WIC-R02) with section C completed.
  
- II. Persons determined income eligible for WIC under this policy shall meet the eligibility criteria for program participation outlined in **CS:01.0**.
  
- III. The LA staff shall document the household size and income on those participants determined income adjunctively eligible under this policy.
  - A. LA staff shall ask the applicant to verbally declare their economic unit size and income. Applicants shall not be required to provide proof of income, such as: paycheck stubs, W2 forms, or bank statements, etc. Even if the applicant's income exceeds the WIC income limits, the applicant is still adjunctively income eligible.
  
  - B. LA staff shall document economic unit size and income on the WIC-35 and in the WIN system for reporting purposes to the United States Department of Agriculture (USDA).
  
  - C. LA staff shall not compare verbally declared income with the limits in **Policy CS: 12.0**. Income eligibility under this policy shall be automatic and determined solely on the documentation of the applicant or household member's eligibility to receive benefits, as applicable, from one of the three gateway programs.
  
- IV. Staff shall document the gateway client identification (ID) or case number on the Gateway Verification Section of the WIC-35 for all participants determined adjunctively income eligible. (Note: A copy of the gateway document is not required.) Select "Online," "By Phone" or

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“Automated” on the WIC-35 if one of these methods is used to verify current gateway eligibility. If phone or automated verification is indicated, the name of the person contacted for phone verification or the phone number used to verify gateway eligibility shall be recorded. When staff verify gateway eligibility by phone or on-line for an applicant who fails to present a written document authorizing gateway eligibility, staff shall also check or circle “27” for “Other” and complete the blank field by entering “phone”, “automated”, or “on-line” on the Gateway Income Method Section of the WIC-35.

- V. The LA has no responsibility to verify the continued eligibility of the participant in their respective gateway program(s) during the current WIC certification period.
- VI. If the participant applies for subsequent certification at the end of the current WIC certification period and is not adjunctively income eligible the applicant shall be screened in accordance with **Policy CS:07.0** for income eligibility.
- VII. Participants are not required to report income changes during certification periods nor are local agencies required to inquire about such changes. However, if information comes to the attention of the local agency during a certification period which suggests ineligibility, a reassessment of program eligibility must be performed during a certification period. Such reassessments are not required when there is 90 days or less before the expiration of the certification period. If the individual is determined ineligible, the local agency shall disqualify the individual and any other family members participating in WIC at the time of the reassessment.
  - A. Some examples of situations which trigger a mandatory reassessment when using gateway eligibility through TANF or SNAP include:
    - 1. household member certified and adjunctive eligibility has changed; or
    - 2. a change in custody, excluding DFPS placements, and/or

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3. household size.
- B. Have the participant bring proof of their continued eligibility in the TANF or SNAP gateway program or proof of income to their next appointment:
1. The individual shall be issued one month of benefits and be required to bring written documentation to the next appointment.
  2. If the client fails to bring proof of continued participation in the gateway program or proof of income, the individual and any other household members participating in WIC at the time of the reassessment shall be disqualified from the Program.
  3. Any reassessment shall determine:
    - a. If the individual is certified as eligible to participate in either TANF or SNAP gateway programs; or
    - b. If the individual is a member of a household which contains a person certified as eligible to receive TANF or a member of a household in which a pregnant woman or an infant is certified as eligible to receive Medicaid; or
    - c. If the individual is income eligible under the procedures of **Policy CS:07.0**.
- C. Medicaid does not need to be reassessed if Medicaid benefits remain in participant's name.

### **Guidelines**

The Women's Health Program provides a limited Medicaid-paid family planning benefit to women ages 18-44 with income at or below 185 percent of the federal poverty level. Only citizens and some immigrants are eligible. Benefits include an annual family planning exam and choice of contraception for 12 months. A pregnant woman is not eligible for Women's Health Program; as such, receipt of Women's Health Program cannot confer adjunctive eligibility to other household members applying for WIC. For more information go to: <http://www.texaswomenshealth.org>.