

Relationships, Income, Resources, and Expenses (09-13-17)

This supplement to the [Data Acceptance Desk Guide](#) will provide guidance on Data Acceptance related to the **Relationships, Income, Resources, and Expenses** pages in KEES. Due to the nature of the information on these pages, or how these pages function, they have been separated from the main [Data Acceptance Guide](#). This supplement is in two sections. The **Relationships** page displays addresses first. The **Financial Data Collection** screens follow.

Relationships

- Data Acceptance on this page is done differently than other data collection screens. Rather than *New* records; there is a number indicator that shows when there are relationships that still need to be added to the case.
- If there is an existing relationship between all case members, the number indicator will be 0. This does not mean there have not been different relationship statuses reported. The worker should refer to the application they are working on to see what is being reported.



- Workers must be aware that DCF requests paternity tests. DCF will adjust relationship statuses based on the results of these tests. If DCF changes a relationship status because of a paternity test, they will add a new relationship with a begin date that indicates the date the paternity status was established. DCF will use the Non-Custodial page to record paternity status information.
- If there is an existing relationship in the system that conflicts with what is being reported on the current application, then research may be needed. If someone is reporting that they are the father of a child, but are unrelated to the child in KEES, workers should visit the **Non-Custodial** page to see if paternity records exist.
- If a couple reports not being married on the application, but they are in the system as married, the worker should review the Medical and/or Non-Medical case file. If they have previously reported/referred to the person as their spouse anywhere, do not update the relationship. They are considered married.

Income, Resources, and Expenses

Workers are required to *Accept* all data that will be needed to process their eligibility action and *Reject* the data that is not needed. If a MAGI action has a Non-MAGI program block on the same case, or an individual may need a Non-MAGI determination, it is expected that Non-MAGI data is left in *New* status until the MAGI Action is completed. After the MAGI action is completed, workers need to assess if a Non-MAGI Action is still needed on the case. If a Non-MAGI action is

needed, the records will remain in *New* so that a Non-MAGI worker can *Accept* or *Reject* those records. If all requesting individuals are approved for MAGI coverage, then the records specific to Non-MAGI programs are *Rejected* by the worker who authorizes the MAGI coverage.

- **Income**

- *Accept* a new income record if there are no high dated income records for that KEES client.
- *Accept* a new income record if the reported employer is different than the previous Medical income record. The current employer will be linked to the new income record. The income record linked to the previous employer will then be end dated.
- *Reject* a new income record if there is an existing income record with the same employer. A new income detail will need to be created with the new wage amount within the existing income record.

- **Resources**

- If a case is MAGI, only these records need to be *Rejected*. If the case is being sent for a Non-MAGI determination, then records must be left as *New*.
- *Accept* if a Resource type does not already exist in the system.
- *Reject* if a *New* Resource record is the same type and amount as a record already in KEES.
- *Accept* if a *New* Resource record is the same type as what is on file, but the amount is different.

- **Expenses**

- If a case is MAGI only, these records need to be rejected. If the case is sent for a Non-MAGI determination, then records must be left as *New*. The following expenses are only used by Non-Medical programs and should be rejected:

- Actual Utilities Category
 - Electricity- Not Used to heat or cool
 - Water/Sewage/Garbage
- Child Support- Court Ordered Category
- Cost of Home- Temp Absence Category
- Dependent Care Category
- Home Repairs- Natural Disasters- Fires/Floods Category
- Medical Expenses Category
 - Working Healthy Premium
 - HCBS Obligation
 - Medical Expense (FA Only)
- Utility Allowance Category

- The following Expenses are used by Medical only or shared with Non-Medical. These need to be evaluated before *Accepting* any data.

Reminder: unless the Data is relevant to the case being processed, the data should be *Rejected*.

- Blind Work Expense Category (Medical Only)

- Impairment Related Work Expense (Medical Only)
- Health Insurance Premiums Category
 - BS/BC (Shared)
 - Health Insurance Premiums (Shared)
 - LTC Insurance Policy (Shared)
 - Medicare Supplement (Shared)
 - Other (Shared)
- Medical Expenses Category
 - Allocation of Income (Medical Only)
 - Non-Participating HH Member (Medical Only)
 - Non-Covered Medical Expense (Medical Only)
 - Override Allocation of Income (Medical Only)
 - Past Due Owing (Medical Only)
 - Medical Expense (Medical Only) (Medical Only)
 - Durable Medical Equipment/Supplies (Shared)
 - Medical Transportation (Shared)
 - Prescriptions (Shared)
 - Private Pay LTC Expense (Shared)
 - Payment Plan (Shared)
- Shelter Category Note: these will only be used by Medical for Spousal Impoverishment cases
 - Association/Mandatory Fees (Shared)
 - Home Insurance (Shared)
 - Home Taxes (Shared)
 - Lot Rent (Shared)
 - Mortgage (Shared)
 - Rent (Shared)
 - Second Mortgage (Shared)