Self-Employment Enhancements

Kersten Denzin, Income Maintenance Training Nhialee Yang, Systems April 18, 2019 Income Maintenance Advisory Committee (IMAC) Meeting



Project Overview

- Background
- Goals

Background

2016

- Review and initial updates of self-employment worker worksheets began
- A self-employment "wish list" began

2017

- Published trainings (Sole-Proprietorships, Partnerships, and Self-Employment Income Report Forms (SEIRFs))
- Re-designed worker worksheets (Sole-Proprietorships and Partnerships)

Background (cont.)

2018

- Redesigned the (Member) SEIRF and (Member)
 Farm SEIRF
- Published a second SEIRF training
- Redesigned worker worksheets (SEIRF, Farm SEIRF, and S-Corporations)
- Project work began

Goals

- Enhance CARES and ACCESS to ensure selfemployment policies are supported and accurately portrayed by workers, applicants, and members
- Streamline self-employment processes by reducing:
 - a. Workarounds
 - b. Manual Work
 - c. System deficiencies
- 3. Improve communication accuracy

Policy Changes

- FoodShare
- Health Care

FoodShare

- Fishing and hunting losses will now be budgeted like farming losses and potentially offset other countable incomes
- FoodShare Handbook 4.3.3.8

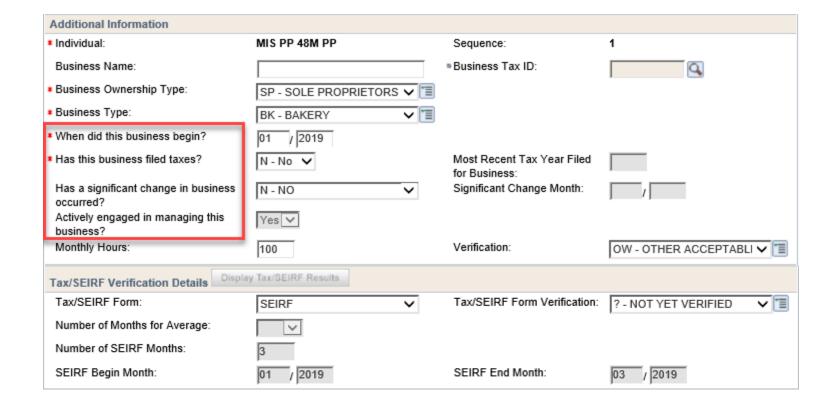
Health Care

- Backdate requests and self-employment
- Budgeting Social Security Income (Operations Memo 18-05)

System Changes

- CWW (Self-Employment page, BC+ Tax Deductions page, Verification Checklist page, and IMQA tool)
- ACCESS
- Correspondences
- IMMR

Self-Employment page



Dynamic Tax Section

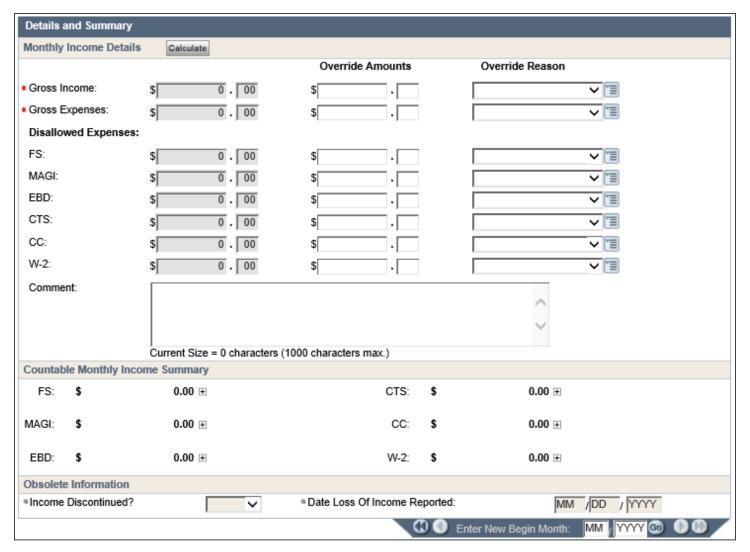
Tax/SEIRF Verification Details	Display Tax/SEIRF Resu	lts					
Tax/SEIRF Form:	Schedule C		Tax/SEIRF Form Verification:	TX - TAX RECORDS ✓ 📜			
Number of Months for Average:	1 🗸		_				
Number of SEIRF Months:							
SEIRF Begin Month:	MM / YYYY		SEIRF End Month:	MM / YYYY			
Tax Form(s)							
▼ Sole Proprietorship: IRS Sch	edule C						
* Gross Income:	\$		Federal, State, and Local Income Tax:	\$.			
Gross Income (If Loss):	\$		Charitable Donations:	\$			
■ Gross Expense:	\$		Guaranteed Payments to Partners:	\$			
* Depreciation:	\$		Employer Work-Related Personal Expens	es: \$.			
* Depletion:	\$		Work-Related Personal Expenses:	\$			
* Amortization:	\$		Principal Payments on Loans:	\$			
Based on client's response, p	opulate blank fields as	· '0'					

Dynamic SEIRF Section

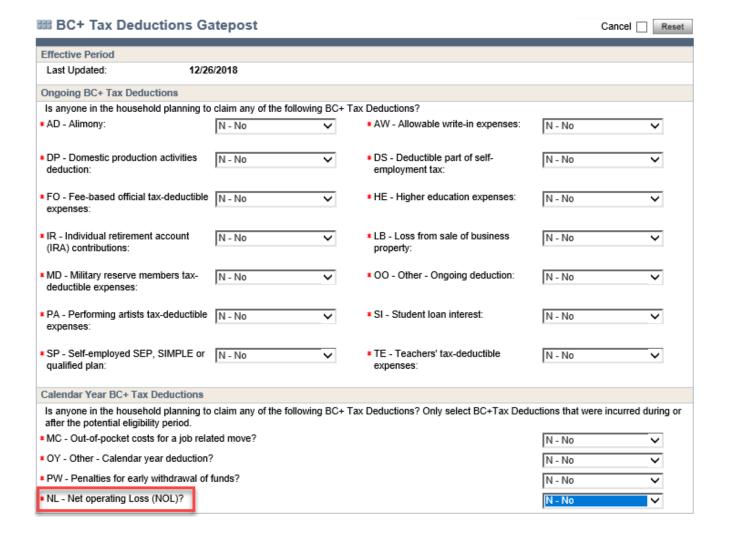
Tax/SEIRF Verification Details Display Tax/SEIRF Results

Tax/SEIRF Form: SE	IRF	~	Tax/SEIRF	Form Verifi	cation:	AF - A	AGENCY	FORM	~ 🔳	
Number of Months for Average:	~									
Number of SEIRF Months: 3										
SEIRF Begin Month: 01	/ 2019		SEIRF End	Month:		03	/ 2019			
Self-Employment Income Report Form	S Export to PDF						▼ Вфа	and All	▶Collapse All	
▼ SEIRF										
SEIRF Month(s):										
Gross Business Income										
Gross Receipts and/or Sales:	\$									
Other Income - Specify:	\$									
Gross Business Expenses										
 Wages and Commissions Paid to Employees: 	Advertising, Dues, and Publications: Taxes (do not include income taxes): \$ 3									
Employee Benefit Programs, Pensions, and Profit Sharing:	\$	* Taxes (do not include income taxes): \$								
■ Travel:	\$		* Purchase F	Price of Inco	me-Produc	ing Asse	ts: \$		□. □	
■ Vehicle:	\$		* Principal P	ayment on L	_oans:		\$		□.┌	
Rent or Lease:	\$		* Depreciation:							
Repairs and Maintenance:	\$									
*Telephone and Utilities:	\$	· [
Materials and Supplies:	\$	· —	Amorazane	A11.			\$			
▶ Freight:	\$									
Legal and Professional Fees:	\$									
Other Expenses				Disallo	wed Expe	nses For				
Description		Amount		FS	MAGI	EBD	CTS	CC	W-2	
		\$	⊐.⊟ 						✓	
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Based on client's response, populate	e blank fields as '0'									
_									onal SEIRE(s)	

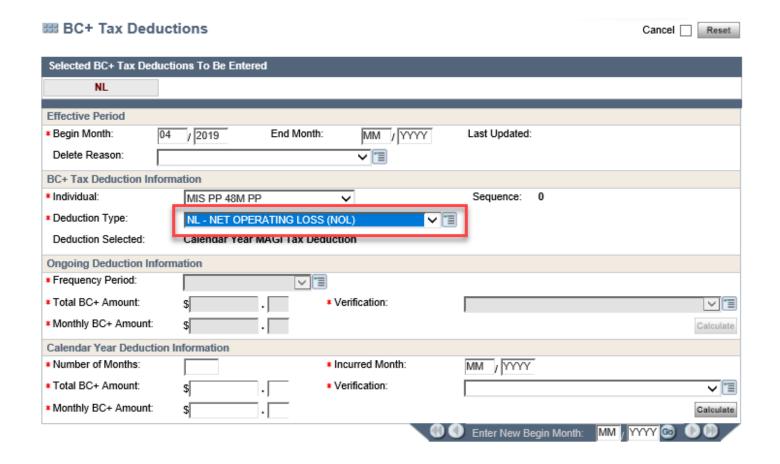
Self-Employment page



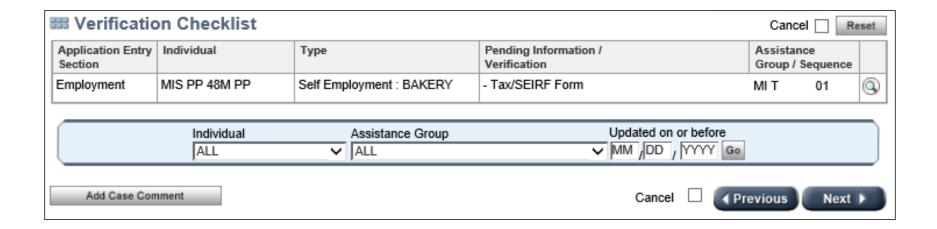
BC+ Tax Deductions



BC+ Tax Deductions



Verification Checklist



IMQA

 New Self-Employment page fields will be represented within the Income Maintenance Quality Assurance (IMQA) tool

ACCESS

- ACCESS Help Text updated
- Self-employment related questions reworded and made required
- Connections made between ACCESS and CARES Worker Web

Correspondences

- Notice of Pending (NOP)
- Notice of Decision (NOD)
- Six Month Report Form (SMRF)
- Self-Employment Income Report Forms (SEIRFs)
- Pre-printed Renewal Form (PPRF)
- Verification Checklist (VCL)

IMMR

- No new reports
- Only three reports in Income Maintenance Management Reports (IMMR) use selfemployment data

Impacts

- Affected populations
- Eligibility Determinations
- Case Processing

Affected Populations

- Approximately 8% of all cases statewide have reported self-employment
- A number of individuals may regain eligibility or experience a reduced (or eliminated) premium due to social security being budgeted differently

Eligibility Determination

- Social Security Income will first be added to other income. Then, deductions and losses will be subtracted
- Reported negative income will display as an expense
- Verification Due Date page will display a banner if the number of SEIRFs being sent to the member updates

Case Processing

- Will be a transition period for workers becoming accustomed to the new Self-Employment page
- Conversion processes will be outlined in the Self-Employment Enhancements Operations Memo
- Doubled the amount of sequences CARES Worker Web supports per person

Pre-Release and Post-Release Efforts

- Operations Memos
- CARES Bulletin Demos
- Training
- Q and A Session

Pre-Release and Post-Release

- Self-Employment Enhancements Operations Memo (6/7)
- Social Security Income Budgeting Operations Memo (6/7)
- CARES Bulletin Demos (6/17)
- Re-write of New Worker Training Self-Employment module and Self-Employment Refresher courses (6/17)
- Questions and Answers Session (7/9)

Questions