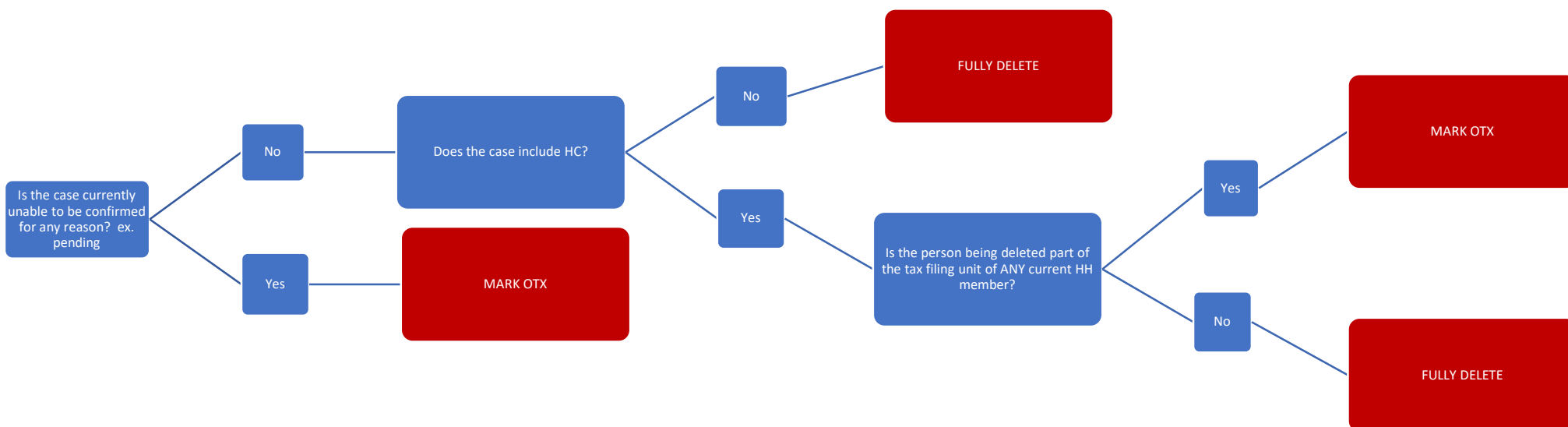


Should I FULLY DELETE or MARK OTX?



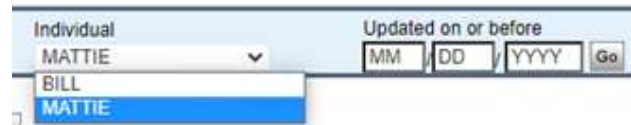
IMPORTANT NOTES:

- If someone who is not in the tax unit is removed by marking them OTX, we should be re-evaluating this at renewal/SMRF/app, and if you can now fully delete them, do so. We can also fully delete these persons at any time once the case can be confirmed.
- There is a different process for children who have been placed outside the home in Foster Care or Kinship Care. Please see Process Help 9.5.2.1 for details. Every county has someone who receives a report from CPS when a child on BC+ is placed in Foster or Kinship care. Please ask your supervisor who the contact is for your agency, as they may already have paperwork regarding the Out of home placement, which could save you from having to email/call CPS for info such as reunification plan in place or cooperation with CPS.
- If a child receiving BC+ moves out of a home but has not moved out of WI to our knowledge, we must maintain their coverage for the 12 month certification period due to Continuous Coverage policies. Please see Process Help 3.20 for guidance on how/when to maintain this coverage at person delete.
- If you are unsure which process applies to the case you're working, please ask a lead or supervisor for assistance before taking action.

How to FULLY DELETE:



Navigate to the HH members page -



Select the correct person and click Go -

Click the 'Delete' box and choose the correct reason (Most common is LC) -

Household Members

The screenshot shows the 'Current Household Members' section of a web application. It contains a table with two members: BILL and MATTIE. Below the table, there is a section for 'Effective Period' with a 'Last Updated:' field. The 'Delete:' checkbox is checked. The 'Delete Reason:' dropdown menu is open, showing a list of reasons: AE - ERROR (DATA IGNORED), AT - ASSET TRANS/RECONVEYED/SOLD/GI, DT - DEATH, KI - INFORMED BY KIDS/CSA, LB - LIVE BIRTH, LC - LEFT CASE/HOUSEHOLD (highlighted in blue), NL - DATA VALID USED FOR DATES ENTD, OT - OTHER, and SB - STILL BIRTH. The form also includes fields for 'Individual Name' (First Name, MI, Last Name, Suffix) and 'Additional Information' (Gender, SSN, Birth Date, SSA Verification, and Verification).

Complete driver flow and make sure you update the following pages for those remaining in the household if applicable:

Current Demo – Is a married person now divorced/widowed/separated?

Absent Parent – Did a parent leave the home and should now be referred to Child Support?

Tax Filing Information – Has there been any change to who files or is being claimed on taxes?

FS Work Registrant / ABAWD Info – Has there been a change to someone’s exemption status?

Once eligibility has been determined please confirm **ALL** programs and check the Case Member History page to ensure the person(s) are **fully deleted**. If there is NO date in the “Deleted Date” column they have **not been fully removed** and this will cause issues in any other case they may be a member of now or in the future. -

Case Member History

Cleared Individuals									
Individual	MCI ID/MAID	PIN	Birth Date	Household Status	Deleted Date	Living Arrangement	Elig Hist	Part Hist	
BOWEN	3803	3407	05/15/1987	Deleted	02/15/2023	15-OUT OF HOME	🔍	🔍	
JAXON	3812	3415	08/02/2014	Current		15-OUT OF HOME	🔍	🔍	
CAROLYN	3798	3393	01/23/1992	Current		01-INDEPENDENT (HOME/APT/TRLR)	🔍	🔍	

Check for other cases the deleted person may be listed on using the “Part Hist” magnifying glass and correct the living arrangement/run elig. -

Living Arrangement	Elig Hist	Part Hist
15-OUT OF HOME	🔍	🔍
15-OUT OF HOME	🔍	🔍
01-INDEPENDENT (HOME/APT/TRLR)	🔍	🔍

MAKE CASE COMMENTS ON ALL CASES YOU TOUCHED

How to MARK OTX:

- Application Entry (0)
- Case Information
- Individual Demographics
- Summary
- Permanent Demo
- Current Demo

Navigate to Current Demo –

Individual	Updated on or before
JAXON	MM DD YYYY Go
CAROLYN	
JAXON	

Select the correct person and click Go -

Update the following fields on the “Living Arrangement Information” section of the Current Demo page for the individual who left the home:

Begin month – Current month

Is this individual a tax dependent or tax co-filer living outside of the household? – YES

DO NOT UPDATE THE “Living Arrangement Type” FIELD. Leave this as 01, 10, etc. DO NOT MARK 15

Living Arrangement Information	
Effective Period	
*Begin Month:	02 / 2023 Last Updated:
Living Arrangements	
*Living Arrangement Type:	01 - INDEPENDENT HOME/AP *Verification: NQ - NOT QUESTIONABLE
*Living Arrangement Date:	MM DD YYYY DOC Record Query
*Minor Parent Living Arrangement:	
*Is this person considered part of the health care household?	
Residential SUD Information Details	
Homelessness Information	
*Expects to have a regular nighttime residence in the next 30 days?	
Has this individual experienced homelessness in the past 12 months?	
Child Out of Home Details	
*Is this a child living outside this home and in Foster Care or court-ordered Kinship Care?	No
Are the parents / caretakers cooperating to re-unite with this child?	Verification: NQ - NOT QUESTIONABLE
Tax Dependent / Tax Co-Filer Out of Home Details	
*Is this individual a tax dependent or tax co-filer living outside of the household?	Yes



Complete driver flow and make sure you update the following pages for those remaining in the household if applicable:

Current Demo – Is a married person now divorced/widowed/separated?

Absent Parent – Did a parent leave the home and should now be referred to Child Support?

Tax Filing Information – Has there been any change to who files or is being claimed on taxes?

FS Work Registrant / ABAWD Info – Has there been a change to someone’s exemption status?

Check for other cases the OTX’ed person may be listed on using the “Part Hist” magnifying glass and run eligibility if needed -

Living Arrangement	Elig Hist	Part Hist
15-OUT OF HOME		
15-OUT OF HOME		
01-INDEPENDENT (HOME/APT/TRLR)		

MAKE CASE COMMENTS ON ALL CASES YOU TOUCHED



Remember, “When in doubt, OTX them out!” We can always fully delete them later