

Prospective or Retrospective Eligibility and Budgeting; REF, REFM, SNAP, TANF

In the REF, REFM, SNAP, and TANF programs, the Department determines how and when to use prospective or retrospective *eligibility* (see OAR [461-001-0000](#)) and *budgeting* (see OAR [461-001-0000](#)) as follows:

- (1) For the *initial month* (see OAR [461-001-0000](#)):
 - (a) For a SNAP case in the Change Reporting System (CRS), the Department uses "actual income" (see subsection (g) of this section) in the *initial month*.
 - (b) For a SNAP program case in the Simplified Reporting System (SRS), "actual income" is used in the *initial month* if that income is not reflective of ongoing monthly income due to a new or terminated source or a significant change in ongoing income. All other income is processed under section (3) of this rule.
 - (c) In the REF and TANF programs, ongoing income, processed under section (2) of this rule, is used in the *initial month*, except when the source of income is a new or terminated source. When there is a new or terminated source of income, "actual income" is used in the *initial month*.
 - (d) In the REFM program, the Department uses only the *initial month* for *eligibility* and *budgeting*.
 - (e) The Department uses prospective *eligibility* and *budgeting* under OAR [461-150-0020](#) for cases not covered under subsections (a) to (d) of this section, including for an individual who leaves a filing group (see OAR [461-110-0310](#)) because of *domestic violence* (see OAR [461-001-0000](#)) and enters a *domestic violence shelter* (see OAR [461-001-0000](#)) or *safe home* (see OAR [461-001-0000](#)).
 - (f) No supplement is issued based on incorrectly anticipated information.

- (g) "Actual income" means income already received in the *initial month* plus all the income that reasonably may be expected to be received within the *initial month*.
- (2) Income is budgeted so that the anticipated amount is the same for each month. The type of income is determined and calculated as follows:
- (a) Income that must be annualized is calculated under OAR [461-150-0090](#) to arrive at a monthly figure.
 - (b) Educational income (see OAR [461-145-0150](#)) is assigned to the months it is intended to cover, regardless of when it is received. The income is prorated over these months.
 - (c) Ongoing *stable income* (see OAR [461-001-0000](#)) is anticipated under OAR [461-150-0070](#).
 - (d) Ongoing *variable income* (see OAR [461-001-0000](#)) is anticipated under OAR [461-150-0080](#).
 - (e) *Periodic income* (see OAR [461-001-0000](#)) is anticipated under OAR [461-140-0110](#).
 - (f) *Lump-sum income* (see OAR [461-001-0000](#)) is anticipated under OAR [461-140-0120](#).
- (3) For an *ongoing month* (see OAR [461-001-0000](#)):
- (a) For a *benefit group* (see OAR [461-110-0750](#)), the Department uses prospective *eligibility* and *budgeting*. The type of income is determined and calculated under section (2) of this rule.
 - (b) If the *budgeting* method changes from prospective to retrospective, the Department treats income from a terminated source that was counted prospectively as follows:
 - (A) If the actual amount received was less than or equal to the anticipated amount, the income is excluded.
 - (B) If the actual amount received was greater than the anticipated amount, the Department counts the difference between actual and anticipated amounts.

- (4) When an individual is added to an ongoing filing group, income is budgeted in accordance with sections (2) and (3) of this rule to determine *eligibility* and benefit level.
- (5) In the SNAP program during the Periodic Report Process, the Department follows the budgeting provisions of sections (2) through (4) of this rule to determine *eligibility* and benefit level using all of the following:
 - (a) Income recently verified and currently budgeted for the case that does not meet the provisions of or conflict with income in subsections (b) or (c).
 - (b) Income from computer matches.
 - (c) Total income reported on the Periodic Report form under OAR [461-170-0011](#) and [461-170-0102](#) –
 - (A) Whose verification is provided with the Periodic Report.
 - (B) That, in comparison to the total *countable* (see OAR [461-001-0000](#)) earned income already budgeted for the *financial group* (see OAR [461-110-0530](#)) has changed by more than \$125.
 - (C) That, in comparison to the total *countable* unearned income already budgeted for the *financial group*, has changed by more than \$125.
 - (D) That exceeds the SNAP Countable Income Limit set at 130 percent of the federal poverty level under OAR [461-155-0180](#), for a *financial group* whose *eligibility* was based on total *countable* income at or below 130 percent.

Statutory/Other Authority: ORS [409.050](#), [411.060](#), [411.070](#), [411.404](#), [411.816](#), [412.049](#)

Statutes/Other Implemented: ORS [409.010](#), [409.050](#), [409.610](#), [411.060](#), [411.070](#), [411.404](#), [411.816](#), [412.049](#)

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