

20. Unrelated Adult Male

20.1 Definitions [43-109.2]

20.1.1 Unrelated Adult Male (UAM)

Regulations and procedures regarding the unrelated adult male (UAM) apply only to the UAM who is not a roomer, boarder or lodger and who lives with a CalWORKs family and the mother is the needy caretaker relative. The UAM must be 18 or older and CANNOT BE RELATED to any member of the CalWORKs family, i.e., persons living in the home who could be included for aid payment and/or eligibility determination. [Refer to “Related Males,” page 20-1] below.]

**Note:**

The mother MAY NOT exclude herself from the AU to avoid applying UAM regulations. However, the SSI/SSP mother, the illegal alien mother, etc., is excluded and the UAM regulations are never applied to such cases.

20.1.2 Unrelated Adult “Female”

If an unrelated adult “female” is living in the home, she DOES NOT have the responsibilities of the UAM. She does not have to sign a statement or make a minimum financial contribution; however, if she has no income or resources and refuses to apply or is found ineligible for public assistance (including GA) the payee must be referred for possible misuse of CalWORKs funds. [Refer to “Suspected Misuse of CalWORKs Funds,” page 58-1].] If the unrelated adult female makes a voluntary contribution to the AU, that contribution is net income to the AU. [Refer to “Room and Board,” page 31-3] if she is a roomer and/or boarder.]

20.1.3 Related Males

If the man living in the home is related to the eligible child by blood, marriage or adoption and is within the fifth degree of relatedness, then that man is considered to be a related male and is not a Unrelated Adult Male. [Refer to “Caretaker Relative Requirements [EAS 82-808],” page 25-5] for a complete listing of these individuals.]

**Example:**

The divorced husband of a CalWORKs mother's sister is now living with the CalWORKs mother as her boy friend. He is still the children's uncle, meets the “related” criterion and is not a UAM.

20.1.4 Unmarried Father

When a CalWORKs mother and her separate child(ren) live with a man who is the unmarried father of their common child, and ONLY the mother and her separate child are on aid, he is considered a UAM. If he makes any funds available to her for her needs or the needs of her separate child, those monies must be considered income. [Refer to “Net Income from the UAM [EAS 44-113.5],” page 20-5.]

If the common child has a basis of deprivation, (i.e., the father is unemployed or the mother is incapacitated) then the common child becomes a mandatory AU member. In this situation, the unmarried father then also becomes a mandatory AU member.



Example:

A mother has one child with an absent parent deprivation and she receives CalWORKs for herself and the separate child. She lives with the unmarried father and their common child, who are not eligible to be in the AU as there is no basis of deprivation. There is no requirement that the unmarried father, who is considered a UAM, make funds available to her and her separate child. The income of the unmarried father is not used in the CalWORKs budget, unless he actually makes any monies available to her.

20.1.5 Roomer and Boarder

A person who sleeps and eats in the CalWORKs home is considered a room and boarder. This person must have separate sleeping facilities which could be considered a rental unit. Examples of a rental unit are a separate bedroom or porch. The couch in the living room is not considered a rental unit. If the recipient states that she and the children sleep together in one room and the unrelated male is a roomer and sleeps in the bedroom usually used by the child, this statement must be accepted. Document the situation completely on the SC 163. Get the mother's statement on a "General Affidavit" (CSF 2) if the situation is questionable. The CalWORKs recipient does not have to make the rental unit available on the open market.

The acceptable rate for a person receiving room and board to pay is determined by using the CalWORKs food allowance (income in-kind amount) for one person plus the cost of one room (add the total cost of rent and utilities or house payment, utilities, insurance, taxes, etc., and divide by the number of rooms in the home exclusive of bathrooms, closets, etc.).



Example:

The house payment is \$600 and utilities are \$80 which equals \$680 divided by 4 rooms (living room, 2 bedrooms, kitchen) in the house equals \$170 plus the amount of the CalWORKs food allowance for one (\$92). The acceptable lodger payment would be \$262.

If the UAM pays less than the acceptable amount, the recipient must be referred to DA-Welfare Fraud Division for misuse of funds.

20.1.6 Roomer

A roomer is a person who only sleeps in the CalWORKs home. All the information pertaining to the roomer/boarder applies except that the amount of the CalWORKs food allowance is not required.

20.1.7 Boarder

A boarder is a person who eats in the CalWORKs home. The person must have an actual residence other than the CalWORKs home which is documented in the **Maintain Case Comments** window of CalWIN. The acceptable payment is the CalWORKs food allowance for one. A referral for misuse of funds to DA-Welfare Fraud must be made if the payment is less than this amount. This income must be reported, with verification, on the SAR 7 and is applied to the CalWORKs budget per income regulations.

20.2 Evidence Required

A UAM living in the home is considered a bona fide lodger, roomer or boarder upon the written statement (CSF 2) of the mother to this effect, supported by evidence such as the following:

- 1040 tax return, indicating that income from the roomer and/or boarder is reported, or
- Possession of a license to operate a rooming house, or
- Evidence that quarters furnished are separate and apart from those occupied by the family, or
- Receipts which indicate payment of room rent and/or board.

Once the initial determination is made, additional verification is only required if there is substantial reason, which must be documented in the case record, to believe that the unrelated male is not a bona fide roomer and/or boarder.

20.2.1 Required Statement (CW 71) [EAS 43-107]

A "Statements of CalWORKs Mother and Unrelated Adult Male" (CW 71) signed by the CalWORKs mother and the UAM living with the family must be provided.

The CW 71 is required at intake, at redetermination, at the time of a restoration if a SAWS 2 is taken, and at any time the EW or client determine that there is a change in the family situation which might affect the UAM contribution. The recipient may submit an amended CW 71 for the current month if

she decides to change her living or income arrangements. The CW 71 or SAR 7 are acceptable notifications of changes in the contribution. The actual contribution MUST BE reported on the semi-annual SAR 7.

- Discussion and completion of the CW 71 is LIMITED only to the fiscal and monetary arrangements between the mother and the UAM.
- The CW 71 is signed by the mother and the UAM under penalty of perjury. If either the mother or the UAM do not understand English, the CW 71 must be provided in a language which each understands, before it is signed.
- If the mother refuses to comply with the requirement to complete and sign the CW 71, CalWORKs must be denied or discontinued. If she appears unable to comprehend or assist in establishing eligibility, action must be taken in accordance with EAS section 40-128.3 and 40-157.213. [Refer to “Redeterminations,” page 8-1]] and [Refer to “Reporting Responsibilities,” page 9-1].]

20.3 Referrals to DA-Welfare Fraud

- When referring an individual to the DA-Welfare Fraud for possible misuse of CalWORKs funds, the CalWIN Referral subsystem must be used, indicating in the comments section "Referral for Possible Misuse of CalWORKs Eligibility Funds Referral". [Refer to “Suspected Misuse of CalWORKs Funds,” page 58-1].]
- If the UAM refuses to cooperate with requirements including signing the CW 71 and/or making the contributions required by CalWORKs regulations (which can be for his needs only), a referral must be made. However, CalWORKs is not denied or discontinued and no UAM contribution is deducted unless actually made.
- If the known or probable income of the UAM is insufficient to provide him with an independent living arrangement, a referral must be made.
- If the UAM makes a contribution which is less than the required contribution, a referral must be made with prior knowledge of the CalWORKs mother and the UAM. Do not refer a UAM who is in receipt of GA. (Contributions may be made in cash and/or in kind.)

20.4 Required Financial Contribution

The UAM is required to make a financial contribution to the family which is not less than it would cost him to provide himself with an independent living arrangement. Any part of the contribution that is designated for his needs is not considered income to the AU.

A UAM who is a recipient of CalWORKs, SSI/SSP, or GA is not required to make a contribution to the CalWORKs AU. Any voluntary contribution must be reported on the SAR 7.

20.5 Net Income from the UAM [EAS 44-113.5]

The net income to the CalWORKs AU from the UAM is the total of:

- Cash given to the AU which is available to meet the needs of the AU and;
- The value of FULL items of need provided in-kind to the AU, unless the AU is receiving this full item of need in exchange for the AU providing the UAM with a different item of need.

Cash given to the AU is not considered income when:

- The cash has conditions placed on its use for non-need items for the AU, the unrelated adult, or any other person.
- The cash has been designated to meet the needs and expenses of the UAM, including work related expenses, i.e., business expenses, child care, and/or the needs and expenses of the unrelated adult's child(ren) or other unaided persons in the home the UAM is supporting.
- The cash equals the UAM's share of the cost of living arrangement.
- The UAM has designated the income as not available to the AU.

20.5.1 Pooled Income

When the UAM's income is pooled with that of the AU, the pooled income is treated as if cash were given to the AU.

20.5.2 Income in-Kind

The value of full items of need provided to the AU is determined according to the income in-kind rules. [\[Refer to "Income in Kind," page 28-1\]](#)

20.5.3 Miscellaneous

Food Stamps and CalWORKs do not treat the UAM in the same manner. [\[Refer to CalFresh Handbook, "UAM," page 9-22.\]](#)

20.5.4 Budgeting Examples

The examples given below are not all inclusive, but are intended as a reference. The EW must document all pertinent information in the case record and resolve any discrepancies. The EW must continue to look for possible misuse of CalWORKs funds.



Example:

It is determined that the UAM and CalWORKs mother have agreed that his contribution of \$386 is for his share of the rent, utilities, and food. In this situation, there is no income to the AU.

Computation follows:

	\$386		UAM contribution
	-	386	UAM's designated share of H/H expense

	\$ 0		Income to AU



Example:

It is determined that the UAM and CalWORKs mother have agreed that \$386 of his total \$400 contribution is for his share of the rent, utilities, and food. In this situation, there is income to the AU.

Computation follows:

	\$400		UAM contribution
	-	386	UAM's designated share of H/H expense

	\$ 14		Income to AU (Unearned)



Example:

It is determined that the UAM has specifically designated his \$486 contribution be used as follows: (1) \$386 is for his needs (e.g., rent, food); (2) \$100 is for his car payment for which the CalWORKs mother makes out a check or money order for him. In this situation, there is no income to the AU, provided it can be verified that the money given to the CalWORKs mother by

the UAM was for the UAM's expenses and not available for use by the AU.

Computation follows:

			\$486	UAM contribution
			-	386
				Designated for his needs
			-	100
				Designated for his expenses

			\$ 0	Income to AU



Example:

It is determined that the UAM has a separate child who is not in the AU. The UAM has designated that of his \$375 contribution (1) \$200 is for his needs; (2) \$175 is for the needs of his child. In this situation, there is no income to the AU.

Computation follows:

	\$375	UAM contribution
-	200	Designated for his needs
-	175	Designated for his child's needs

\$ 0		Income to AU



Example:

It is determined that the UAM pays directly to the landlord \$600 of the \$785 total rent as his contribution. There is no income to the AU as the UAM is providing a partial item of need.



Note:

Rent is used only as an example; it could be any need item (i.e., rent, utilities, food and clothing).



Example:

It is determined that the UAM pays the entire \$975 rent directly to the landlord. In this situation, the income to the AU is the lesser of the income in kind table amount for the number of people in the AU, the prorated share of the net market value or the actual cost of the item. For this example, assume the household consists of the UAM, the CalWORKs mother, and her two

aided children.

Computation follows:

- a. Determine AU's prorated share of the rent
 $\$975 \text{ (rent)} \times 75\% = \$731 \text{ (AU's prorated share)}$
- b. Determine in kind value of housing for AU size per chart-
AU (3) = \$321 (effective 1/1/07)
- c. Income to the AU is the lesser of \$731 and \$321
Income is \$321 (Unearned).



Example:

It is determined that the UAM and CalWORKs mother have no specified arrangement for the use of his \$500 contribution and he has not designated any portion for his needs. In this situation, the income to the AU is the total amount contributed.