



FAMILY INDEPENDENCE ADMINISTRATION

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POLICY BULLETIN #07-127-ELI (This Policy Bulletin obsoletes PD #04-37-ELI)

CHANGE IN BUDGETING METHODS FOR CA HOUSEHOLDS CONTAINING SSI RECIPIENTS

Date: October 5, 2007	Subtopic(s): CA Budgeting, SSI Income																
<p> This procedure can now be accessed on the FIAweb.</p>	<p>The purpose of this policy bulletin is to inform Job Center staff of a change in the budgeting method for households that contain a mandatory filing unit member in receipt of Supplemental Security Income (SSI).</p> <p>In PD #04-37-ELI, workers were advised that as a result of a State regulatory change, the needs of an SSI recipient who would otherwise be required to be included in the mandatory filing unit of a Cash Assistance (CA) household had to be included when determining the standard of need. Once the standard of need was determined, it would then be reduced by the SSI recipient's proportionate share of needs.</p> <p>Under this budgeting method, the CA grant for a household of three (for example, an SSI mother and two children) would have been determined as follows.</p> <p>Semimonthly CA budget for three people, including SSI individual:</p> <table style="margin-left: 40px;"> <tr> <td>Pre-added food and other allowance</td> <td style="text-align: right;">\$119.00</td> </tr> <tr> <td>Shelter allowance with children</td> <td style="text-align: right;">200.00</td> </tr> <tr> <td>Energy grant</td> <td style="text-align: right;">+ 26.50</td> </tr> <tr> <td>Total needs for this H/H of three:</td> <td style="text-align: right;"><u>\$345.50</u> S/M</td> </tr> <tr> <td>Each person's pro rata share:</td> <td style="text-align: right;">$\\$345.50 / 3 = \underline{\\$115.00}$ S/M (rounded down)</td> </tr> <tr> <td>Total needs</td> <td style="text-align: right;">\$345.50 S/M</td> </tr> <tr> <td>Less SSI recipient's share</td> <td style="text-align: right;"><u>-115.00</u> S/M</td> </tr> <tr> <td>CA grant for this H/H was:</td> <td style="text-align: right;"><u>\$230.50</u> S/M</td> </tr> </table>	Pre-added food and other allowance	\$119.00	Shelter allowance with children	200.00	Energy grant	+ 26.50	Total needs for this H/H of three:	<u>\$345.50</u> S/M	Each person's pro rata share:	$\$345.50 / 3 = \underline{\$115.00}$ S/M (rounded down)	Total needs	\$345.50 S/M	Less SSI recipient's share	<u>-115.00</u> S/M	CA grant for this H/H was:	<u>\$230.50</u> S/M
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HAVE QUESTIONS ABOUT THIS PROCEDURE?
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send an e-mail to *FIA Call Center*

At this time the change in budgeting methodology for these cases at the Job Centers must be **applied to CA application cases only and recipient households where a filing unit member becomes an SSI recipient on or after September 14, 2007.**

The regulatory change guiding this budgeting method has been revoked. Effective immediately, when a multi-person household **applies** for CA, and that household contains minor dependent children and a mandatory filing unit member in receipt of SSI, the needs of the household must be determined by excluding the SSI recipient and basing the CA standard of need on the remaining members. This means using an "N" rather than a "Y" in the **Rel** field of the **Budget (Individual Income/Needs)** window in POS.

The same household of three (SSI mother and two children) will now be budgeted as follows.

Semimonthly CA budget for two people, excluding SSI individual:

Pre-added food and other allowance	\$ 89.50
Shelter allowance with children	141.50
Energy grant	+ <u>19.75</u>
Total needs for H/H of two:	<u>\$250.50</u> S/M (rounded down)

In addition, for a recipient household in which a filing unit member starts to receive SSI **on or after September 14, 2007**, the needs of the household must be determined by excluding the SSI recipient and basing the CA standard of need on the remaining members.

Refer to the PA Budgeting Manual, pgs. A48 through A51 for more information on Rice Budgeting.

This change does not apply to households subject to Rice budgeting. Such households generally contain adults only who are legally responsible for each other (i.e. a married couple). Safety Net Assistance (SNA) cases where there are children on the case who are under age 18 (or age 18 and in full-time secondary school or the equivalent), and one of the adults is an SSI recipient, cannot have Rice budgeting applied even if the child is not active on the case.

Workers are reminded that the legally responsible SSI recipient and income must be included when determining eligibility for food stamps (FS) and benefit amount.

At this time, changes in the budgeting methodology for active cases where the needs of the SSI person were included in the determination of the total household needs must not be made. At recertification, if otherwise eligible for continued assistance, the case must be recertified using the budgeting methodology that was in place prior to the change. New York State Systems Office-Welfare Management Systems (WMS) will rebudget the case and issue any retroactive benefits owed to the household. Any rebudgeting to eliminate the needs of the SSI person done at the Job Center level will affect the integrity of the process.

WMS is preparing to do a mass rebudgeting effective 12/A/07 of all cases where the needs of the SSI individual, other than cases subject to Rice budgeting, were included in the determination of the household standard of need. Further information regarding State actions on this issue will be provided at a later date.

Effective Immediately

Reference:

GIS 07 TA/DC011