



FAMILY INDEPENDENCE ADMINISTRATION

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BUDGETING METHODS FOR CA HOUSEHOLDS CONTAINING SSI RECIPIENTS (SWIFT/RICE BUDGETING)

Date: September 11, 2012	Subtopic(s): CA Budgeting, SSI Income
<p>  This procedure can now be accessed on the FIAweb. </p> <p> This methodology does not apply to households residing in shelter with an SSI recipient. </p> <p> FA (Family Assistance) households and SNA (Safety Net Assistance) households with children. </p>	<p> Purpose: The purpose of this policy bulletin is to inform Job Center staff of the budgeting method for households that contain an SSI recipient. </p> <p> When a Cash Assistance household contains an SSI recipient, depending on the case type and the legal lines or responsibility, one of the following budgeting methods must be applied: </p> <ul style="list-style-type: none"> ▪ Regular budgeting – this methodology is applied when determining the monthly TA grant and allowances for a Family Assistance (FA), Safety Net Federally Participating (SNFP), or Safety Net <u>converted</u> (SNA) household, for adults and children residing with an SSI recipient, the presence, income or resources of the SSI recipient must not be considered when determining the needs of the household. ▪ Rice Budgeting – this methodology is applied when the SSI recipient is a “legally responsible relative” (LRR) and/or there is no child in the case who meets the definition of a TANF child ▪ Swift Budgeting – this methodology is applied when an SNA recipient lives with a non-legally responsible relative in receipt of SSI <p> Regular Budgeting When determining the CA grant amount for a FA household, SNFP household, or a SNA household that has received 60 months of assistance in a federal category, if a member of the household is 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 entering Code N (Individual with SSI is Not in Filing Unit) in the Rel (Relationship Indicator Code) field of the Budget (Individual Income/Needs) window in POS. </p>

HAVE QUESTIONS ABOUT THIS PROCEDURE?
 Call 718-557-1313 then press 3 at the prompt followed by 1 or
 send an e-mail to *FIA Call Center Fax* or fax to: (917) 639-0298

Under this budgeting methodology, the CA grant for a household of three, consisting of an SSI mother and two children, will be budgeted as follows:

Semimonthly CA budget for two people, excluding SSI individual:

Pre-added allowance	\$126.00
Shelter allowance (with children)	141.50
Energy grant	<u>+22.50</u>
Total needs for H/H of two:	<u>\$290.00</u> S/M (Rounded down)

RICE Budgeting

A SNA household, which contains a legally responsible SSI recipient, and/or does not contain a child, is subject to Rice budgeting. This method requires the SSI recipient to be **included** in the calculation of the needs on the CA case.

SNA households without children.

In the case of Rice budgeting, when an SSI recipient is legally responsible for the other members of the CA household, when calculating the budget, **Code Y** (SSI Individual Would be in Filing Unit) is entered into the **Rel** field. This will indicate to Welfare Management Systems (WMS) that the individual's prorated needs should be considered in determining CA benefits. In this situation, the individual with **Code Y** in the **Rel** field will be added to the total household count. WMS will calculate CA Benefit Amounts based on the total household count, and then exclude the prorated share of the SSI recipient. Any income associated with Income Source Code **31** (SSI Benefit) will also be excluded from the budgeting calculation.

Under this budgeting methodology, the CA grant for a household of two, consisting of a husband and a legally responsible SSI wife, will be budgeted as follows:

Semimonthly CA budget for two people (includes legally responsible SSI individual):

Pre-added Allowance	\$126.00
Shelter Allowance (Without Children)	125.00
Energy Grant	<u>+22.50</u>
Total needs for H/H of two:	<u>\$273.50</u>
Each Person's pro rata share:	<u>\$136.75</u> (Rounded down)
Total needs:	\$273.50
Less SSI recipient's share:	<u>-136.75</u>
CA grant for this H/H is:	<u>\$136.75</u>

households with non-legally responsible SSI recipients

Swift budgeting

A SNA household which contains a non-legally responsible SSI recipient is subject to Swift budgeting. This method excludes the SSI recipient from the calculation of the needs on the SNA case, but prorates the shelter as the SSI recipient has a share of the shelter expense.

When the SSI recipient is not legally responsible for the SNA Household being budgeted, but the person is on the case for FS, enter **Code N** in the **Rel** field. This will indicate to WMS that the individual's needs should not be prorated from the CA Grant Amount. For this situation, the SSI recipient will not be included in the CA total household count and will be ignored in the CA needs calculation.

If the SSI recipient is not a member of the FS household, then an off line calculation must be done to determine the prorated share of the rent. The prorated share of the rent must be entered in the **SHELT AMT** field on the **NSBL02 (Household/Suffix Financial Data)** screen.

Example:

Mr. Brown, a 25 year old SNCA applicant/participant resides in an apartment in Brooklyn with his mother. Mr. Brown is the tenant of record. The rent is \$200 per month. Mr. Brown's mother receives SSI of \$761 per month and contributes her prorated share of \$100 per month ($200/2 = 100$) toward the rent.

Because Mrs. Brown is not legally responsible for her son, her presence nor her income or resources can be considered in determining the CA grant. Therefore, Mr. Brown's PA budget would be calculated as follows:

Semimonthly CA budget for one person (excluding non-legally responsible SSI individual):

Pre-added Allowance	\$76.00
Shelter Allowance	\$50.00*
Energy Grant	\$14.10

Total Needs for H/H of one: \$140.00
(Rounded Down)

*Note the shelter allowance is prorated and Mr. Brown will only receive his prorated share of the rent (semimonthly amount shown) up to the CA allowable maximum for a household of one. The semimonthly maximum shelter expense for a household of one \$107.50.

In all situations, if the SSI person is applying for or in receipt of Supplemental Nutrition Assistance Program (SNAP) benefits with the CA household, the SSI income must be considered when determining SNAP eligibility and grant amount.

Effective Immediately

References:

[94-ADM-10](#)