

**GENERAL INFORMATION SYSTEM**

12/4/08

**DIVISION:** Office of Health Insurance Programs**PAGE 1**

GIS 08 MA/035

**TO:** Local District Commissioners, Medicaid Directors

**FROM:** Judith Arnold, Director  
Division of Coverage and Enrollment

**SUBJECT:** 2009 SSI, LIF/SCC, and MA Only Income and Resource Levels

**EFFECTIVE DATE:** January 1, 2009

**CONTACT PERSON:** Local District Support Unit  
Upstate (518)474-8887 NYC (212)417-4500

Mass rebudgeting (MRB) will be accomplished in two phases for 2009. Phase I, which will include chronic care cases only, is scheduled for November 27, 2008, upstate, and December 6, 2008 in New York City (NYC). On December 15, 2008 the new Medicaid Standard and Medically Needy levels will be available for MBL budgets with a from date of January 1, 2009.

Phase II of MRB will occur in early 2009. In previous years, Federal Poverty Levels (FPLs) were estimated. For 2009 FPLs, we will no longer be estimating and will update FPLs when they are published in the Federal Register. At that time, a mass rebudgeting for non-chronic care cases will be performed. Further information will be forthcoming.

**Phase I - MRB of Chronic Care Cases (11/27/08 Upstate, 12/6/08 NYC)**

- a) chronic care cases only (Budget types (BTs) 07, 08, 09 and 10, upstate, and BT 07, NYC
- b) will include changes to Principal Provider and chronic care notices, effective January 1, 2009, if elected by the district
- c) No action is to be taken at this time on the community portion of a combination budget type 08, 09 or 10, since these budgets will not reflect the 2009 Medically Needy, LIF, or S/CCs income/resource levels
- d) 5.8% Social Security COLA increase will be applied to income as applicable, to chronic care cases only
- e) the Social Security COLA will not be rebudgeted for community cases.

**Phase I - Update of Medicaid Standard and Medically Needy (MN) Levels (12/15/08)**

- a) will apply to budgets with a from date effective January 1, 2009 or later including recertifications for January 1, 2009 or later (processing must be after 12/15/08)
  - recertifying cases in which there is a negative impact should be put on hold and extended for a limited period so that they can be rebudgeted with Phase II MRB
- b) Federal Poverty Level (FPL) will not be updated, at this time
- c) resource levels will be updated for January 1, 2009

- d) If a district becomes aware of a spenddown case that would have a decrease in the monthly spenddown amount due to the increased medically needy income level, the case should be rebudgeted, after 12/15/08, with an effective date of 1/1/2009 or later. This should be limited to cases in which:
- there is no Social Security income
  - there is no negative impact
- e) SSI benefit levels will be updated for January 1, 2009.

**Phase II - Update of Federal Poverty Levels and MRB of Community Cases with Social Security Benefits**

- a) Actual date will be determined by the date of release of the new FPLs in the Federal Register.
- b) Mass rebudget all the non chronic care cases using:
- new FPLs
  - Medicaid standard (S-CC, LIF)
  - medically needy level
  - 5.8% COLA for remaining cases
- c) Further information will be forthcoming.

Effective January 1, 2009, Medicaid eligibility must be determined using the following updated figures:

1. Medicaid Income Standards (MIS) and Medically Needy (MN) income levels, and resource limits for all categories.

HOUSEHOLD SIZE	MEDICAID STANDARD S/CC - LIF		MEDICALLY NEEDY INCOME LEVEL		RESOURCES
	ANNUAL	MONTHLY	ANNUAL	MONTHLY	
ONE	8,462	706	9,200	767	13,800
TWO	10,563	881	13,400	1,117	20,100
THREE	12,568	1,048	15,410	1,285	23,115
FOUR	14,593	1,217	17,420	1,452	26,130
FIVE	16,686	1,391	19,430	1,620	29,145
SIX	18,217	1,519	21,440	1,787	32,160
SEVEN	19,829	1,653	23,450	1,955	35,175
EIGHT	21,899	1,825	25,460	2,122	38,190
EACH ADD'L PERSON		99	2,010	168	3,015

2. The Supplemental Security Income federal benefit rate (FBR) for an individual living alone is \$674/single and \$1,011/couple.
3. The allocation amount is \$350, the difference between the Medicaid level for a household of two and one.
4. The 249e factors are .965 and .174.
5. The SSI resource levels remain \$2,000 for individuals and \$3,000 for couples.
6. The state supplement remains \$87 for an individual and \$104 for a couple living alone.
7. The Medicare Part A premium is \$244/month for people having 30-39 quarters and \$443/month for people who are not otherwise eligible for premium-free hospital insurance and have less than 30 quarters.

8. The Medicare Part B **standard** monthly premium remains \$96.40 per month.\*
9. Maximum federal Community Spouse Resource Allowance is \$109,560.
10. Minimum State Community Spouse Resource Allowance remains \$74,820.
11. The community spouse Minimum Monthly Maintenance Needs Allowance (MMMNA) is \$2739.
12. Maximum Family Member Allowance remains \$584 until the FPLs for 2009 are published in the Federal Register.
13. Personal Needs Allowance for certain waiver participants subject to spousal impoverishment budgeting is \$350.
14. Family Member Allowance formula number remains \$1750 until the FPLs for 2009 are published in the Federal Register.
15. Substantial Gainful Activity (SGA): Non-Blind \$980/month, Blind \$1640/month, Trial Work Period (TWP) \$700/month.
16. SSI-related student earned income disregard limit of \$1640/monthly up to a maximum of \$6,600/annually.

\* If income is above \$85,000 (single) or \$170,000 (married couple), then your Medicare Part B premium may be higher

**MBL Transmittal 08-4**

- a) The transmittal provides details of this year's upstate MBL Mass Rebudgeting scheduled for November 27, 2008.
- b) Pages 4 and 8 of 20 list Family Health Plus cases (Case type 24) as criteria; however as this MRB will only include chronic care cases. FHP is not a criterion.
- c) Page 8 of 20 instructs workers to review the budget for BUY-IN and Medicaid eligibility changes. Workers should not review these budgets at this time.

Please direct any questions to the Local District Support Unit at 518-474-8887 Upstate and 212-417-4500 for NYC.