

DEPARTMENT OF SOCIAL SERVICES

744 P Street, Sacramento, California 95814



December 8, 1999

ALL-COUNTY LETTER NO. 99-102

TO: ALL COUNTY WELFARE DIRECTORS

Reason For This Transmittal

- State Law Change
- Federal Law or Regulation Change
- Court Order or Settlement Agreement
- Clarification Requested by one or More Counties
- Initiated by CDSS

SUBJECT: JANUARY 2000 SOCIAL SECURITY TITLE II (RETIREMENT, SURVIVOR'S AND DISABILITY INSURANCE [RSDI]) AND TITLE XVI (SUPPLEMENTAL SECURITY INCOME/STATE SUPPLEMENTARY PAYMENT [SSI/SSP] PROGRAM) COST OF LIVING ADJUSTMENTS (COLA) AND RELATED ISSUES THAT AFFECT IN-HOME SUPPORTIVE SERVICES (IHSS) RECIPIENTS

REFERENCE: IN-HOME SUPPORTIVE SERVICES CASE MANAGEMENT, INFORMATION AND PAYROLLING SYSTEM (IHSS/CMIPS) USER'S MANUAL

This All County Letter (ACL) provides you with the following:

- Instructions regarding automating the RSDI increase for affected income eligible IHSS recipients
- Instructions regarding automating all IHSS Share of Cost (SOC) recipient cases with Link 1, 2, 3, 4, or 5 in Field I2 of the form SOC 293
- Instructions regarding forms and listings
- January 1, 2000 SSI/SSP benefit levels
- Changes of dollar amounts used for manually calculating a recipient's share of cost on the forms SOC 294A and SOC 294C, "IHSS Income Eligibility - Adult or Child"

A. RSDI Increases

1. All SOC cases that have been automated by CMIPS and have a Code 1 (RSDI) in Source Field I4, J1, J2, K1, or K2 will have that amount increased in the corresponding Income Field by 2.4 percent.

To facilitate automation of RSDI we are making two assumptions:

- The current entry in the Source Field(s) represents a gross amount that has been rounded down to the nearest dollar by the Social Security Administration (SSA)
- The current entry in the Source Field(s) is the gross amount that includes the Medicare Part B premium for those persons who must pay their own premium.

The computation will produce the RSDI benefit amount to be used in automating the January 2000 SOC. (Example: the benefit amount is \$438.00, multiplying by 1.024 equals \$448.51 and rounding down to the nearest dollar equals \$448.00.)

2. It should be noted, as in previous years, the SSA applies the COLA to the actual, rather than the rounded benefit amount. This may result in a \$1.00 discrepancy in the RSDI benefit amount for some beneficiaries and a \$1.00 understated SOC.

In order to avoid the recomputation of every case subsequently identified as having an incorrect SOC solely due to the RSDI COLA automation, counties are authorized to correct the SOC at the time of the next eligibility redetermination or when an income change is reported. This delay in correcting a SOC does not result in a collectable overpayment.

B. SSI/SSP Benefit Levels

1. Effective January 1, 2000, all SSI/SSP levels in combined total benefits will increase by 2.4 percent.
2. The SSI COLA will also impact the income exclusion allowances for non-eligible children, spouses, and parents that are used in the SOC deeming procedures. Those changes are reflected on the forms SOC 294A and SOC 294C SOC worksheets (Attachments C and D).
3. Some IHSS status-eligible recipients will lose their SSI/SSP eligibility effective January 1, 2000, because the RSDI COLA increase will cause their incomes to exceed the new SSI/SSP benefit levels. Counties must contact those recipients and assess if they are income eligible. We have requested the California

Department of Health Services' (CDHS) assistance in identifying these recipients known as "Pickle Persons" who are potentially eligible for categorically needy Medi-Cal benefits, under the 1976 Pickle Amendment to the Social Security Act.

- The CDHS will place these recipients in Pickle Aid Codes - 16, 26, or 66 - on the Medi-Cal Eligibility Determination System (MEDS) at least until April 30, 2000, or until their eligibility status is determined.
- CDSS will provide county listings when the listings are completed. A "C" by the recipient name will identify those recipients who are probably eligible for the Personal Care Services Program (PCSP). Please provide your county Medi-Cal staff with a copy of the listings; they will be responsible for making the Pickle determinations on these cases.
- Recipients who are PCSP-eligible should remain in IHSS Aid Codes 10, 20 or 60 as status-eligible cases until the county can enter the Pickle Aid Codes in CMIPS and indicate the recipient is now PCSP eligible. Change the aid code to 16, 26 or 66, which should enter the Pickle indicator 16, 26 or 66 into Field D3 of the SOC 293 for those cases. Counties should monitor their listings to assure Pickle eligibility is established.

C. Share of Cost Cases

1. Effective January 1, 2000, all SSI/SSP benefit levels are greater than preceding benefit levels that were listed in two separate benefit tables. You do not need to indicate a table number for benefit levels in Field I1 Share of Cost. CMIPS will automatically default to a D. The field will remain in use for entry if a county must, for some reason, build eligibility segments for years prior to 2000.
2. All automated IHSS income-eligible cases with Link 1, 2, 3, 4, or 5 in Field I2 shall have their SOC re-computed January 1, 2000, because of RSDI increases and/or SSI/SSP benefit level changes. Cases with an end date less than or equal to December 31, 1999 that have not had an end date extension due to an earlier automatic extension (e.g., rate change) will have an end date extension to January 31, 2000 in Field ZZ4. There will, however, be some excluded cases that will be printed on county exception lists.

Regardless of the cause, the following alert message for each excepted case will be printed on the monthly "CMIPS Warning Alert Listing" and will continue on the list until corrected. The alert message is:

"060 Share of Cost Date is not January 1st"

3. A Notice of Action (NOA) will be generated to advise IHSS recipients of the adjustment made to their RSDI and SOC computations. The SOC will be changed for all IHSS recipients affected by the January 2000 COLA. The NOA message (number 353) will read:

“The change in your IHSS Share of Cost shown above is effective ##/##/## because of COST-OF-LIVING adjustment to SSI/SSP benefit levels and to the social security payments available to you which are \$#####.##, \$#####.##, and \$#####.##”. “If the Social Security amount you receive is different from reported here, contact your service worker within ten calendar days. MPP Section 30-755.233.”

4. The automation of SOC cases is scheduled to run December 13, 1999, so that we can meet the timelines for the NOAs. Any changes or new cases added to CMIPS after December 13, 1999, should use the following procedure so that correct segments can be built on the SOC 293 M, N, and O lines:

- Turnaround Document (TAD) #1:

Enter appropriate data for 1999 SOC fields and wait for the next TAD to enter 2000 data. A NOA will be generated containing the usual SOC message(s).

- TAD #2:

Enter 01/01/00 in SOC Field II. Enter corrected RSDI income in Source/Income Field - I4, J1, J2, K1 or K2 (1.024 x 1999 amount rounded down to the nearest dollar).

CMIPS will re-compute the correct SOC, and a NOA will be generated containing the usual SOC message(s).

5. The SOC cases that are not updated may result in the IHSS recipient paying a SOC which exceeds or is less than his/her liability. County welfare departments will be responsible for making reimbursement to, or collecting overpayments from, those persons affected.

D. Aid Codes 14, 24 and 64

The PCSP and IHSS residual recipients in these aid codes lost their SSI/SSP eligibility either September 1, 1993, September 1, 1994, or December 1, 1995, due to SSP reductions in each of those years. However, they have been held harmless from paying either a Medi-Cal or an IHSS SOC. These individuals will continue to receive IHSS/PCSP without a SOC for as long as their special Medi-Cal status continues, and their IHSS/PCSP eligibility is not interrupted.

E. Forms and Listing

1. SOC 293 and SOC 311 TADs will be generated on all automated IHSS income-eligible cases. The TADs will have a message printed at the top that will read “Share of Cost COLA 2000.” There will also be NOAs generated, which will have the message as displayed in section C.3. on page 4.
 - Only the cases that have an identical SOC reflected on both the SOC 293, Share of Cost Field M6, and SOC 311, Share of Cost Field F5, will have a SOC 311 updated and a TAD generated. All other cases will be shown on the County Exception List, and the county must manually change the SOC 311.
 - We are not able to automate the anticipated Veteran’s Administration Benefits, Code 2, in the Source/Income field - I4, J1, J2, K1 or K2. However, for ease in identifying those cases, a separate listing will be provided.
 - We are not able to automate the RSDI increase for a spouse that may affect the recipient’s SOC because CMIPS is not coded to differentiate that income source. However, all cases impacted by the SOC automation will have a dollar sign (\$) by the name on the Monthly Characteristics Listing and Office Caseload Listing that may be used as a reminder to validate any change in a spouse’s income.

2. All TADs and NOAs will be printed at the printer sites by on-line counties. Non-printer site counties will have TADs and NOAs printed by the Electronic Data Systems and mailed to the recipient and county, as appropriate.
 - Please plan for printing needs by ordering forms SOC 293, SOC 311, and NA 690
 - Please do not delay printing and mailing the NOAs following the December 13, 1999 COLA automation run.
 - The printing of the SOC 293 and SOC 311 TADs may be delayed for one or two days to suit the convenience of the county.

F. SOC 294A and SOC 294C

Consistent with the SSI/SSP benefit payment level adjustments, the following changes should be made to the allowances shown on forms SOC 294A (IHSS Income Eligibility-Adult) and SOC 294 (IHSS Income Eligibility-Child).

1. SOC 294A (Attachment D):

Change allowance in Column B, Row 2a to \$257.00, and change allowances in Column B, Row 6 to \$257.00.

2. SOC 294C (Attachment E):

Change allowances in Column A, Row 2a to 257, and change allowances in Column A, Row 14 to (1) \$512.00 and (2) \$769.00.

G. Attachments

1. Attachment A is the SSI/SSP Payment Standards, effective January 1, 2000.
2. Attachment B is a copy of the revised pages for the IHSS/CMIPS User's Manual pages V-A-15 through V-A-19.
3. Attachment C - Form SOC 294A (IHSS Income Eligibility - Adult).
5. Attachment D - SOC 294C (IHSS Income Eligibility - Child).

For questions regarding CMIPS procedures, please call Michiyo Laing at (916) 229-4015 or Cathy Briggs at (916) 229-4020; policy questions should be directed to your county operations analyst at (916) 220-4000.

Original Signed By
Donna L. Mandelstam on December 8, 1999
DONNA L. MANDELSTAM
Deputy Director
Disability and Adult Programs Division

Attachments

STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL SERVICES
ADMINISTRATION DIVISION

ESTIMATED SSI/SSP PAYMENT STANDARDS
EFFECTIVE JANUARY 1, 2000
Includes the 1/00 CNI and CPI COLAS.

ESTIMATES BRANCH
November 1999
November 3, 1999

CNI: 2.36% (c)
CPI: 2.40% (c)

	INDEPENDENT LIVING			REDUCED NEEDS			NON-MEDICAL OUT-OF-HOME CARE 1/ (NIMOH)			IN LICENSED FACILITY OR HOUSEHOLD OF RELATIVE WITHOUT IN-KIND ROOM & BOARD		
	RESIDING IN OWN HOUSEHOLD	HOUSEHOLD OF ANOTHER WITH IN-KIND ROOM & BOARD	HOUSEHOLD OF RELATIVE WITH IN-KIND ROOM & BOARD	WITH IN-KIND ROOM & BOARD	WITH IN-KIND ROOM & BOARD	WITHOUT IN-KIND ROOM & BOARD	WITH IN-KIND ROOM & BOARD	WITHOUT IN-KIND ROOM & BOARD				
	TOTAL	SSI	SSP	TOTAL	SSI	SSP	TOTAL	SSI	SSP	TOTAL	SSI	SSP
INDIVIDUAL:												
AGED OR DISABLED - without cooking facilities (RMA) 2	692.00	512.00	180.00	529.00	341.34	187.66	679.00	341.34	337.66	847.00	512.00	335.00
BLIND - living with parent(s) or non-relative guardian	765.00	512.00	253.00	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
DISABLED MINOR	749.00	512.00	237.00	599.00	341.34	257.66	679.00	341.34	337.66	847.00	512.00	335.00
COUPLE:												
AGED OR DISABLED - per couple	1,229.00	769.00	460.00	1,006.00	512.67	493.33	1,396.00	512.67	883.33	1,694.00	769.00	925.00
BLIND - per couple	1,375.00	769.00	606.00	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
BLIND/AGED OR DISABLED - per couple	1,424.00	769.00	655.00	1,202.00	512.67	689.33	1,396.00	512.67	883.33	1,694.00	769.00	925.00
	1,351.00	769.00	582.00	1,128.00	512.67	615.33	1,396.00	512.67	883.33	1,694.00	769.00	925.00

TITLE XIX MEDICAL FACILITY	
Individual	Couple
Total	\$44
SSI	30
SSP	14

1/ NON-MEDICAL OUT-OF-HOME CARE		Personal and Incidental Needs Maximum:		Care and Supervision Minimum:	
Individual	Couple	Board and Room	Board and Room	Board and Room	Board and Room
\$174	\$88	\$310	\$363	\$174	\$310
Minimum:	Maximum:	Minimum:	Maximum:	Minimum:	Maximum:
\$98	\$366	\$363	\$363	\$98	\$366

2/ RMA - Restaurant Meals Allowance - \$73 Individual; \$146 Couple

This field displays two entries on the RHSA and RELA screens; one for the INDEX and the other for the HOURS.

Field H3: W/O IHSS - Required, Numeric

Length: 1

Description: Without IHSS - Rating of recipient's outcome with reduced services. Indicate one of the following codes

- 1 - Recipient not at risk with services reduction
- 2 - Recipient at risk with services reduction
- 3 - Recipient will require out of home community care
- 4 - Recipient will require out of home medical care
- 5 - Recipient will become unemployed

Field H4: NEED PROVIDER - Required, Numeric

Length: 2

Description: Need Provider - Indicates whether IHSS recipient needs help to obtain a service provider.

- 00 - Recipient has own resources to obtain a provider
- 11 - Recipient does need help to obtain a provider

Field I1: SHARE OF COST DATE/*INDICATOR*(The word *INDICATOR* is not printed in this field.) - Optional, Alphanumeric

Length: 6/1, Format: MM = Month DD = Day YY = Year

Description: Share of Cost Date - Indicates the effective date of a recipient's share of cost. The date may be mid-month for intake cases but it must be the first of the month when a change is made.

Indicator – Immediately to the right of the date there is a space for a code, which has been used in some years to indicate the multiple yearly IHSS share of cost benefit levels. Effective January 1, 1999 there is only one benefit level table. Enter one of the following codes.

- D - All shares of cost effective on or after January 1, 2000.
- N - Recipients who have been continuously income eligible for IHSS since prior to September 1, 1993 and before January 1, 2000. Use this code only if a share of cost must be computed for a period prior to January 1, 2000.
- C – All income eligible recipients that became eligible for IHSS on or after September 1, 1993 and before January 1, 2000. Use this code only if a share of cost must be computed for a period prior to January 1, 2000.

- This field is required for automated share of cost computation.
- Whenever there is an automatic COLA resulting in a change in share of cost, the share of cost date will be updated. This will normally occur yearly on January 1.

Refer to Section V-B, Special Instructions, Share of Cost Computations - SOC 293.

Field I2: LINK - Optional, Numeric
 Length: 1
 Description: Link - Enter the code which indicates recipient's income computation status and spouse/parent(s) linkage to Supplemental Security Income/State Supplemental Program (SSI/SSP) - Aged, Blind and Disabled. This field is required for automated share of cost computation.

- 1 - IHSS individual
- 2 - IHSS individual/linked spouse
- 3 - IHSS individual/non-linked spouse
- 4 - IHSS individual/non-linked parent
- 5 - IHSS individual/non-linked parents

Refer to Section V-B, Share of Cost Computations - SOC 293.

Field I3: DEP - Optional, Numeric
 Length: 2
 Description: Dependents -The number of minor legal dependents with no income of their own to be considered in the automatic computation of countable income for an adult recipient with a non-linked spouse, or a child recipient whose parent(s) income must be considered. This field is required for automated share of cost computation.

The numbering of the data entry fields on the RHSB and RELB screens differs from the numbering listed here for the SOC 293, beginning at Field I4 through Field L2, although the field name is the same.

Field I4, J1, J2, K1, K2: SOURCE/INCOME/DEDUCT - Optional, Numerical
 Length: 1, 7, 7 - Format: X, XXXX.XX, XXXX.XX
 Description: Source/Income/Deduct - Source and amount of deductions from income of the recipient, parent, spouse. This field is required for automated share of cost computation.

Source - These codes indicate the source of the recipient's, spouse's, parent(s) gross income.

- 1 - Retirement, Survivors, Disability Insurance (RSDI) - recipient
- 2 - Veteran's administration - Recipient
- 4 - Railroad retirement - Recipient
- 5 - Other pension - Recipient
- 6 - Other unearned - Recipient
- 7 - Earned - Recipient
- 8 - Unearned - Spouse/parent
- 9 - Earned - Spouse/parent

Income - Amount of gross income available to the recipient, spouse, parent.

Deduct - Dollar amount of total income deductions other than the income exclusions. The allowable deductions in this category include:

- Any amount that a recipient pays for services that are an alternative to IHSS may be entered in the deduct field. This deduction should not exceed the IHSS cost for the same service(s).
- Impairment related work expenses and expenses for a Plan for Achieving Self-Support (PASS). These are work and training related programs for recipients.

Standard income exclusions that are included in the automatic share of cost computation are:

\$20.00	Standard exclusion
\$65.00	Earned income exclusion
One half remainder of income	- Earned income exclusion
\$257.00	Needs of children/non-linked spouse
\$512.00 or \$769.00	Allowance for parent(s)

Refer to Section V-B, Special Instructions, Share of Cost Computation - SOC 293.

Field I5: COUNTABLE INCOME - Optional, Numeric

Length: 6

Description: Countable Income - The sum of all net income available to recipient.

- For those recipients whose share of cost is automated, this field will be calculated and the countable income figure will be system-generated.

- The amount that has been manually computed (for those recipients whose countable income is not automated) must be entered in this field to enable the correct share of cost information on an automated Notice of Action.
- For a linked couple, both of whom are income eligible IHSS recipients, either divide that countable income by 2 or allocate the countable income in unequal portions, whichever is the most advantageous to the couple. Enter that sum in I5.

Refer to Section V-B, Special Instructions: Share of cost computation - SOC 293.

Field J3: BENEFIT CODE/LEVEL - Optional, Numeric
 Length: 2, 8 - Format: XX, XXXXX.XX
 Description: Benefit Code/Level - This field indicates the SSI/SSP benefit code and level used to determine the recipient's share of cost.

- This field includes both recipients who have countable income which is automatically computed or countable income which is manually computed.
- For those recipients whose share of cost is automated, this field must have a two digit benefit code entered.

<u>Benefit Code</u>	<u>Benefit Level</u>
01 - Individual aged or disabled, own home	\$ 692.00
02 - Individual blind, own home	749.00
03 - Individual disabled minor, own home	593.00
04 - Individual aged or disabled, household of another	529.00
05 - Individual blind, household of another	599.00
06 - Individual disabled minor, household of another	421.00
07 - Individual aged or disabled, independent, living without cooking facilities	765.00
08 - Couple aged or disabled, own home	1,229.00
09 - Couple both blind, own home	1,424.00
10 - Couple blind/aged or disabled, own home	1,351.00
11 - Couple aged or disabled, household of another	1,006.00
12 - Couple both blind, household of another	1,202.00

13 - Couple blind/aged or disabled, household of another	1,128.00
14 - Couple aged or disabled, independent, living without cooking facilities	1,375.00

- Linked Couple - Both members of a couple are blind, disabled, or over age 65.
- If one member of the linked couple is income eligible and the other receives SSI/SSP, is PCSP eligible, or has no need for any services, then use the appropriate code above (08 - 14) and the couple's income for the remaining member's share of cost computation
- For a linked couple, both of whom are income eligible and need IHSS, enter the appropriate code below (15 - 21) for the partially automated share of cost computation, based on the countable income entered in Field I5.

<u>Benefit Code</u>	<u>Benefit Level</u>
15 - Couple aged or disabled - own home, per person	\$ 614.50
16 - Couple both blind - own home, per person	712.00
17 - Couple blind/aged or disabled - own home, per person	675.50
18 - Couple aged or disabled - without cooking facilities, per person	687.50
19 - Couple aged or disabled - household of another, per person	503.00
20 - Couple blind - household of another, per person	601.00
21 - Couple blind, aged or disabled - household of another, per person	564.00

Refer to Section V-B, Special Instructions, Share of Cost Computations - SOC 293.

Field K3: SHARE OF COST - System Generated, Numeric

Length: 6

Description: Share of Cost - Monthly amount of money to be paid by the recipient before IHSS will be paid by the county.

- For those recipients whose Shares of Cost are automated, this field will have an entry.

